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Herefordshire Council

Herefordshire Town Centres PPS4 Assessments

Paper 2: Town Centre Health Checks

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Contents

1 Introduction

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 assessment of the existing town centre uses within Herefordshire, focusing on the health of the main centres of Hereford, Leominster, Ross-on-Wye, Ledbury, Kington and Bromyard. It also provides an assessment of some other centres and facilities – see Section 2. A plan showing the location of the key centres within the Study Area is included at Appendix 1.

Information Sources

1.3 A significant amount of health check work has been carried out for Hereford City in the past by consultants and the Council. We draw on the findings from these earlier assessments and, where practical we make comparisons and observe historic changes.

1.4 The principal assessments to which have had regard are:

- Hereford City Centre, Retail Audit and City Centre Management Strategy, Hillier Parker, July 1994;
- Hereford City Centre Study, Retail Audit, June 1999; and
- Hereford City Centre – Assessment of Development Sites, Donaldsons, January 2001.

1.5 We have also drawn on material from the West Midlands Regional Spatial Strategy – Regional Centres Study, Roger Tym and Partners, March 2006 (and updates) for the purpose of comparing the performance of Hereford City Centre with the competing centres of Worcester, Gloucester and Cheltenham.

1.6 The principal information sources that we have used are as follows.

- Drivers Jonas field surveys undertaken in September/October 2007 (additional 'addendum update' field surveys undertaken in March/April 2009 and June/July 2010);
- Herefordshire Council information on floorspace, commitments and proposals, available at October 2007 (updated July 2010);
- Experian Goad information on floorspace, retailer representation and vacancies;
- Published databases on retailer representation and demand - EGi, Focus, IGD, and Promis;
- Local estate agents for local market information;
- Valuation Office for information on rents and yields; and
- PMRS on pedestrian flows within Hereford City Centre:

2 Methodology

2.1 This Paper provides an assessment of existing ‘town centre’ uses in accordance with PPS4 criteria, which we have described in Paper 1.

2.2 The majority of health check work was undertaken during initial site surveys in 2007. However, where appropriate these have been updated to note any significant changes in retailer representation, changes in vacant premises, and noticeable changes in the overall appearance and performance of the centre in market and environmental terms. These updates have been informed by Drivers Jonas site visits in March/April 2009 and most recently by Drivers Jonas Deloitte visits in June/July 2010.

Centres and Facilities Covered

Town Centres

2.3 This analysis focuses on an assessment of the performance of the existing ‘town centres’ of Hereford, Leominster, Ross-on-Wye, Ledbury, Kington and Bromyard, against the key indicators of vitality and viability. The indicators used in this assessment are described below.

2.4 Unless otherwise stated, references to the City Centre and town centres generally refer to the UDP Central Shopping and Commercial Area (CSCAs).

2.5 The Herefordshire UDP classifies the County’s retail hierarchy under four levels. Below the Sub Regional Shopping Centre of Hereford, and the Market Towns, the hierarchy includes Local Shopping Centres and Neighbourhood Shopping Centres (within the urban areas of Hereford).

2.6 We have not undertaken health checks of the Local Shopping Centres within the County, or the Neighbourhood Shopping Centres in Hereford City.

Other Shopping and Commercial Facilities

2.7 We have noted the presence of other retail and ‘town centre’ uses in non-town centre locations. This covers all centres, but has particular significance for Hereford City. It includes out-of-centre food stores, factory outlet centres (Ross-on-Wye), retail warehouses, significant office developments, and significant restaurant, catering, hotel uses.

2.8 Information in respect of these facilities includes, where available, floorspace and units, occupation / user, planning permissions and restrictive conditions, etc.

Competing Strategic Centres

2.9 The competing centres of Worcester, Gloucester and Cheltenham are covered, focuses on the headline details including: diversity of uses, vacancies, demand for representation, rents and yields, and commitments and proposals.

Health Indicators

Quantity and Quality of Retailing and Other Commercial Uses

2.10 Key uses such as cinemas and other large leisure facilities, business, office developments, large retail facilities and concentrations of Class A3-A5 uses have been identified.

2.11 We have also included an overview of the location of the key uses within the centres, particularly the primary and secondary shopping areas, any leisure quarters and concentrations of night-time activities – pubs, bars, restaurants, nightclubs etc.

Diversity of Uses

2.12 An analysis of the mix of uses within the centres and the quantum of floorspace they occupy has been undertaken. We have used data from the Council's analysis for Hereford City (updated by Drivers Jonas Deloitte site surveys), and data from Experian Goad on Leominster, Ledbury and Ross-on-Wye.

2.13 The analysis compares the proportion of different uses in each centre against the national average levels.

Representation by retailers and other commercial operators

2.14 The analysis covers the level of representation by national retailers and the proportion of independent retailers within the centre.

2.15 Where available we have placed the centres within a retail hierarchy using an independent guide, the Management Horizons Europe (MHE) UK Shopping Index (2008). Using the MHE Index it is possible to compare Hereford to neighbouring and competing centres both within Herefordshire and beyond. Towns and major shopping centres are rated using a weighted scoring system which takes account of each location's provision of retailers and anchor store strengths. This provides a basis for analysing the critical mass and marketing position of the top 6,000+ retail destinations in the United Kingdom.

2.16 We have also assessed the presence of national leisure operators, public house and restaurant operators.

Demand for Representation by Retailers and Other Commercial Operators

2.17 Demand for floorspace has been assessed using the EGi (Estates Gazette website) and Focus databases of commercial requirements for each of the centres. Information from these national sources should be treated with caution, as it represents interest only from operators who make use of the data-base. Retailer demand can, for example, be strongly influenced by new property being made available and marketed. This latent demand may not be evident from national databases.

2.18 For the smaller centres and for other uses that EGi and Focus do not highlight (office uses for example) we have undertaken initial discussions with local agents to assess the level any nature of demand for units within the centres.

Shopping Rents and Yields

2.19 Data from the Valuation Office has enabled an analysis of yield levels. This includes an examination of historic and current data to understand the changes over time, particularly in relation to investor confidence.

2.20 It should be noted that a low yield indicates that a centre is attractive where rents are expected to grow. Conversely a high yield indicates some investor caution about a centre's growth prospects.

2.21 Within the smaller centres, current and historic data on rents and yields is less readily available. We have therefore sought data from Estates Gazette and local agents.

Primary and Secondary Shopping Frontages

2.22 Within the larger centres we comment on the characteristics of primary and secondary retail frontages - their location and any concentrations of uses or vacancies within the frontages.

2.23 For some of the smaller centres primary and secondary frontages are not defined. In these instances we have commented on the active frontages and identified any areas of the centres that are less active.

2.24 The assessment of frontages relies on a combination of pedestrian flow counts, evidence of the mix of uses, presence of national and independent operators, location of vacancies and Drivers Jonas site surveys.

Vacant Street-level Property

2.25 Evidence from Experian Goad, Council data (for Hereford) and Drivers Jonas Deloitte site visits provide an understanding of the level and location of vacancies within the identified centres. It is important to note that some level of vacancies is a healthy and natural function of centres, though concentrations or long term vacancies can be an indicator of stagnation or weakness.

2.26 Any concentrations of vacancies or large vacant units and long term vacancies have been identified as areas that may require management.

Pedestrian Flows

2.27 Data from Pedestrian Market Research Services (PMRS) has been used to understand the overall levels and the concentrations of footfall within the centre of Hereford.

2.28 For the smaller centres, independent data on pedestrian flows is not available. We have therefore provided a commentary on the active areas within the centres to provide a meaningful understanding of pedestrian levels and routes within these centres.

Accessibility

2.29 We have provided an analysis of the availability and frequency of public transport access to the centres from a range of destinations.

2.30 Availability of car parking within and around the centres has also been assessed including on-street parking, managed car parks, and parking charges.

2.31 Access to the centres for pedestrians and cyclists and facilities for pedestrians and cyclists has also been assessed. Key indicators are cycle routes into and through the centres and pedestrianised areas to enable circulation.

Perception of Safety and Occurrence of Crime

2.32 For the larger centres, indicators such as CCTV, police presence on street and location of police stations have been assessed.

2.33 West Mercia Constabulary data on the occurrence of crime in the various centres has been used.

Centre Environmental Quality

2.34 The overall quality and state of repair of existing buildings has been assessed using indicators such as the presence of pedestrianised areas, street furniture, soft landscaping, availability of public areas, parks etc. Indicators also include any air pollution, noise, litter and graffiti.

Development Plan Allocations, Proposals and Commitments

2.35 This includes commentary on any sites that are allocated within the development plan for town centre uses, that have not come forward

2.36 We also note extant planning permissions for significant levels of new floorspace (over circa 500 sq m) and change of use of premises over this size. This includes a general description of the type and location of the proposals and the expiry date for the planning permission.

2.37 We also provide commentary on the type and location of any significant planning applications currently being considered by the Council or forthcoming applications. An example is the Edgar Street Grid scheme within Hereford City Centre. This commentary is not exhaustive.

Soft Areas and Potential Development Sites

2.38 In addition to development plan allocations, we have noted sites within the centres that are vacant and could be re-developed for a town centre use.

3 Retail Market

3.1 The past 2 years have been a turbulent time for the retail property market. Across the UK rising unemployment, falling house prices, sluggish wage growth and fears over the overall health of the economy have resulted in more difficult personal circumstances and low levels of consumer confidence. This in turn has led to a prolonged fall in consumer spending and stifled levels of business investment.

3.2 Although there have been signs of economic recovery in 2010, the Coalition government elected in May is committed to major cuts in public expenditure as well as increase in the VAT at the year end. It is likely therefore that pressure on consumer spending will remain for some yet and that conditions for retailers will remain difficult. The UK retail property market is in a period of significant uncertainty.

Town Centre Retailing

3.3 Town centre retailing is the most important sales channel in UK retailing, although it has been significantly hit by the global economic recession. High street retailer failures have become commonplace recent examples including Woolworths, Sofa Workshop, Whittards, Streetwise Sports, Ethel Austin and the fashion group Mosaic, and there remains concern that more will follow.

3.4 On a more positive note, there are some new entrants to the UK market (including Steve Madden Footwear and Hollister) and more are looking to expand (including Bank Fashion, Primark and Fat Face). Other retailers such as H&M and Halfords are investing in their existing store formats.

3.5 In terms of vacancy rates, primary stock has remained fairly fully occupied: hence the rapid take up of the best Woolworths' stores when the group failed. This has been evident in Herefordshire where in Hereford City Centre the former Woolworth store has been relet to Peacocks, whilst WH Smith have taken the store in Leominster, Carpetright have opened in the Ross on Wye store and Well Worth It in the Ledbury store. Retailer demand across the board however remains subdued and secondary and tertiary areas are being worst hit by the increase in vacancy rates.

3.6 In terms of new development anticipated to come forward in the UK in 2009-2010, the shopping centre pipeline shrank quite dramatically from 1.5 million sq m that was anticipated at June 2008 to only 530,000 sq m by December 2008. This is a result of delays to many town centre regeneration schemes throughout the UK. The Edgar Street Grid is the major regeneration initiative within Hereford City of which redevelopment of the Livestock Market site for retail and leisure purposes is a key component. We understand that the selected developer Stanhope remains committed to making a planning application for this development by the end of 2010.

Market Towns

3.7 Other than Hereford City the principal Herefordshire centres (Ross-on-Wye, Ledbury and Leominster) are akin to market towns, which at a national level have been strongly affected by changing retail trends.

3.8 Strong income and expenditure growth in recent decades has affected retailing in two principal ways. First, as disposable incomes rise an increasing proportion is spent on discretionary and luxury items. Shops selling quality and fashion related products have therefore expanded disproportionately, relative to other forms of comparison trading (household goods, etc). This has been coupled with a large increase in the spending power of the most fashion conscious younger age groups.

3.9 Second, there has been a strong rise in car ownership and mobility. In 1961 only 30% of households had a car and only 2% had more than one car. With public transport (as well as walking and cycling) the dominant mode of transport, shopping choices were limited and distances travelled were short. For the UK as a whole, about 77% of households now have one or more cars and a third of households have two or more cars, representing a huge increase in mobility over the last fifty years.

3.10 The stronger emphasis on quality and fashion products coupled with increased mobility has favoured larger centres over smaller centres. The larger centres have increased in size and importance relative to smaller centres, which in turn has further reinforced the attraction of larger centres to more mobile shoppers. The smaller centres and market towns have, therefore, lost market share and have seen much less new development than the overall rate of expenditure growth could actually support. This situation is very evident from the relatively low market shares of comparison goods expenditure attracted by the Herefordshire centres from their catchment areas.

Grocery and Food Retailing

3.11 The supermarket sector continued to grow despite the economic downturn, with 2008 witnessing food and grocery specialists defying the wider retail market gloom and increasing their combined sales by 5.0% to £124.1bn[1]. Grocers (such as Tesco and Asda) performed especially well with sales ahead by 5.6% - their strongest growth since 2001[2].

3.12 Indeed, despite the deteriorating economic conditions within the UK, grocers' sales have continued to grow However, improved performances from the likes of Morrisons and Asda have also been highly influential, as has the continued roll out of new floorspace and product innovation within the sector. Generally, grocers have shown themselves to be more adept in reacting to the changing market conditions than retailers within other sectors.

3.13 The 'Top Four' supermarkets (Tesco, Sainsbury's, Asda and Morrisons) have become more flexible in their criteria for new site selection, have worked hard to increase floorspace at their existing outlets (particularly through the installation of mezzanine floors) and diversified into new formats such as non-food only stores. In the last two years there have been proposals for extensions of Morrisons large foodstores in Ross-on-Wye and Leominster, whilst an extension application for Sainsbury's in Hereford is currently under consideration. Also included within the sales of grocers' superstores are online sales, which have provided a strong sales boost over the past decade.

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[1] Verdict – UK Grocery Food and Retailers (2009)

[2] Verdict – UK Grocery Food and Retailers (2009)

3.14 The non-food market within the supermarket sector has been hit particularly hard by the economic climate. Whereas food represents an essential purchase, non-food purchases are becoming increasingly more discretionary. This is reflected in recent trading updates from Tesco, which has a large proportion of non food within its sales mix. Nevertheless, grocers as a whole have managed to outperform the non-food market by adapting their ranges to reflect more cautious purchasing behaviour and by focusing even more closely on price[3].

3.15 'Hard discounters' such as Aldi, Lidl and Netto have substantially increased their advertising expenditure over the last couple of years and have been busy opening new stores in a bid to increase their market share. While these types of stores have previously struggled to make significant inroads into the UK market, they are now attracting new customers, including a proportion of more affluent shoppers. Verdict predicts that this will continue well into the future, coinciding with slower economic growth[4].

3.16 There has also been a key change in consumer shopping patterns. Many more consumers shop around for the best prices. M&S Food is under the most pressure from its competitors, due to its upmarket position and low success in initiatives such as meal deals and other promotional activity. This has resulted in a shift to lower price products, with a wider range and variety of promotional activities and expansion or launches of retailers own brand discount ranges (for example Waitrose).

3.17 The role of Multi-channel retailing[5] is also becoming increasingly more important to the grocery sector. Many of the top four grocers (Tesco, Sainsbury's, Asda and Morrisons) have increased their capacity and geographical coverage, and the growth in online shopping has driven their sales.

Out-of-Centre Retailing

3.18 The out-of-centre retailing market has been particularly susceptible to the economic downturn, especially bulky goods retailers.

3.19 A number of out of centre fascias have been placed into administration over the past twelve months, including Floors 2 Go, MFI, Rosebys, Au Naturale, Sleep Depot, ILVA, ScS and Big W (Woolworths).

3.20 There are some more positive trends taking place in this particular sector however. For example, there remains some interest to expand further into this market including from operators such as the Steinhoff Group (including Bensons for Beds and Harvey's the Furniture Store), the Carphone Warehouse, Peacocks, Kutchenhaus, Dreams and Pets at Home.

3.21 Elsewhere, operators are taking advantage of empty properties, for example, B&M and Home Bargains. Discounter retailers are also being acquisitive on retail parks, in particular Lidl and Aldi.

3.22 Other operators who opened stores in 2008 but then deferred their expansion programmes, for example Tesco Home Plus, BHS Home and Marks and Spencer, are expected to resume their expansion when the conditions begin to pick up.

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[3] Verdict – UK Grocery Food and Retailers (2009)

[4] Verdict – UK Grocery Food and Retailers (2009)

[5] Multichannel retailing is where retailers provide customers with more than one way to buy their goods: e.g. through providing both a physical retail store and an online store.

E-Retail

3.23 Shopping patterns have shifted significantly in the past decade due to internet retailing, and it now accounts for a large proportion of retail sales within the UK. Most retailers continue to value retail stores above all other forms of retailing. However, retailers are adopting a 'multi-channel' approach – using physical store, websites and catalogues to sell their merchandise. Many are also at the forefront of internet retailing, as they have an existing brand loyalty, strong buying power and efficient distribution networks, and the internet is another means of attracting custom.

3.24 The effect of the internet on some retail sectors including electricals, books, music and travel has been highly significant, as price-led shoppers seek such items on the internet where they can be found at lower prices. For example, in 2006 Dixons withdrew from the High Street completely to become a wholly on-line retailer. These retail sectors are having to adapt quickly in order to maintain a presence on the High Street. Consumers are becoming increasingly comfortable in buying these products without handling them.

3.25 Some companies who began on the internet, now recognise the advantage of having regionally based shops. This strategy shows that the internet may be the nursery for new independent retailers.

3.26 Electricals and food and grocery continue to dominate online retailing accounting for 25.7% and 25.3% of all online sales respectively[6]. Even in the recession, the sector continues to perform well, and saw a growth of 25% to £18.4 billion in 2008[7], a growth which is predicted to continue. This is a result of an increased number of internet users, resulting in more shoppers and more transactions taking place online.

3.27 As prices are frequently cheaper than on the high street, the main issue deterring customers from shopping online is the cost of delivery. 59.4% of shoppers[8] say that free delivery is an important incentive to online shopping. Hence the retailers that offer this more are likely to be more successful in the market place. E-retailers which offer free delivery options already include Play, Waitrose and Amazon.

3.28 However, high broadband costs are limiting the further growth of this sector, and usage is limited within some socio-economic and age groups. There is a low appreciation of the E-retail sector by those aged 55+, but this age group is becoming increasingly more 'technology savvy', and this is likely to result in the growth of E-retail within this age band.

3.29 Where internet access exists in rural areas, the use of online shopping is generally higher than average due to its increased convenience respective to urban areas. This is a result of increased distances to the nearest shopping area (especially for specialist goods) in rural areas.

[6] Verdict – UK e-Retail 2009

[7] Verdict – UK e-Retail 2009

[8] Verdict – UK e-Retail 2009

4 Hereford City

4.1 This Section focuses on an analysis of the current health and retail standing of Hereford City Centre, but also refers to facilities outside the centre.

City Centre Overview

4.2 Hereford is identified as the sole sub-regional shopping centre within Herefordshire, as defined within the adopted Herefordshire Unitary Development Plan. The primary retail area is centred around the mainly pedestrianised areas of High Town, High Street, Eign Gate and Commercial Street. The only part covered shopping centre in the City Centre is the Maylord Shopping Centre, located between Blueschool Street (Ring Road) and Commercial Street.

4.3 The shopping area within Hereford is mainly accommodated in ground floor units, thus providing accessible retail facilities. The City Centre is also well served by a number of modes of transport, including cycling, on foot, train and bus.

4.4 Overall, Hereford City Centre faces below average competition from competing retail centres and ranks 12 out of the 200 PROMIS centres on the PMA Competition Indicator (a rank closest to 1 indicates a low level of competition).

City Centre Health Indicators

Quantity and Quality of Retailing and Other Commercial Uses

4.5 Hereford City Centre accommodates a range of retail facilities that are discussed in detail below. In addition to retailing, the centre also has a wide range of non-retail facilities and activities including tourist attractions such as Hereford Museum on Broad Street. Of particular significance and of major religious and tourist importance is Hereford Cathedral with its world famous library collection.

4.6 Within the UDP CSCA boundary, there is a mix of retail facilities. The table below summarises this mix as at the time of the initial 2007 survey: -

Sector	No. of Units	% of Units	National Average %
Convenience	28	5.2	9.2
Comparison	239	44.3	45.5
Service	214	39.6	33.2
Other	7	1.3	1.3
Vacant	52	9.6	10.8
Total	500	100	100

Source/notes:
(1) The categories are based on the classification provided by GOAD, relate to ground floor uses only and are based on the

GOAD analysis of August 2006, updated by Drivers Jonas site visits in September 2007. Data on UK averages has been provided by GOAD (October 2007).
(2) Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services, building societies, estate agents and valuers. Taxi offices are also included in the service category, although this use is not categorised by GOAD.
(3) Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis. Therefore for the purpose of comparison, these have been excluded from our analysis.
(4) 'Other' category includes employment agencies, tourism offices and main and sub-post offices.

4.7 This table demonstrates that the dominant uses within Hereford City Centre were comparison shops and services. Service uses comprised 39.6% of the total units within the centre, which was above the national average of 33.2%. Although the convenience retail figure appeared below average in the above table, it should be noted that these figures related to uses inside the City Centre boundary. Beyond this boundary lie several other convenience retailers which were not included in the above analysis but did feature in the GOAD analysis. This includes retail stores such as Morrisons and Aldi.

4.8 The size of the City Centre has allowed different uses to proliferate within distinct areas of the city. Retailing essentially cuts a swathe through the City Centre from Eign Gate to the west to Commercial Square in the east. This entirely pedestrianised thoroughfare then feeds neighbouring streets such as Widemarsh Street and St Peters Street to swell the retail concentration in the very core of the City Centre around High Town.

4.9 Independent retail also has created niche shopping streets offering an broader range of specialist items largely unavailable in the primary shopping area. Of particular note is the pedestrianised and historically important Church Street.

4.10 Within Hereford City Centre, there are also a number of 'town centre' facilities which are used after shopping hours for activities such as eating and drinking. In particular, there is a marked concentration of leisure uses along Commercial Road towards Brook Retail Park. The street is occupied by a variety of public houses, takeaways and leisure uses. The concentration of such service uses is pronounced in this area with many public houses such as The Kings Fee (560 sq. m.) operated by JD Wetherspoons, The Hop Pole and The Saracen's Head all adjacent to each other. Further along the street is Hereford's Odeon cinema, the smallest cinema in the Odeon chain with one screen only, incorporating 330 seats.

4.11 Although restaurants and cafes are widely dispersed through the centre, there is a marked concentration of those establishments along Broad Street, a street which connects High Street and shopping core to the Cathedral grounds. Occupiers on the street include national chains such as Pizza Express and Ask alongside local independent outlets. A sign of the increasing proliferation of such establishments on the streets was the conversion of two former vacant units into one restaurant unit which is now known as Thai Gallery.

4.12 There is a good spread of service uses throughout the centre which contributes to a varied street scene and encourages footfall around the centre. Amongst the most dispersed service uses are hair and beauty centres which can be found on most streets within the centre. Whilst there are some notable and prominent ground level units, such as the Toni & Guy Salon on Commercial Street (140 sq m), grouping of such uses tends to occur within the smaller units on side streets such as East Street.

4.13 Beyond the CSCA boundary there was a noticeable change in occupiers and use during the initial survey. Of the 28 identified retail/service units beyond the CSCA boundary, 68% of units were dedicated to service uses.

4.14 Overall, having regard to the diversity of leisure and service uses and their spread around the centre, we consider that the variety of out-of-hours activities within the centre is fair.

Representation by retailers and other commercial operators

4.15 There are a number of national multiple retailers located within Hereford, including Marks & Spencer, and W H Smiths. As of 2007, Hereford City Centre included 65% of the top 20 retailers in their classification, with notable retailers such as Debenhams and John Lewis absent from the centre. This rank was based on ORC's forecast of average town centre sales for individual retailers within Great Britain. There are also a large number of smaller independent traders present within Hereford which contributes to the diversity of the retail offer.

4.16 The City Centre has however been adversely affected by the closure of Hereford's only department store and largest independent retailer, Chadds. The store closed in June 2008 with the loss of 128 jobs, with the store's manager stating that a store of its size could not survive without a more modern and efficient building. The store was subsequently sold and subdivided into four retail units. The largest of these at 40-46 Commercial Street (770 sq.m. sales) is a sizeable vacancy. However the unit was in the process of being remodelled/refurbished at the time of the July 2010 health check, with national toy retailer The Entertainer scheduled to open in the unit. The remaining former Chadds units (opposite) are currently occupied by discount retailers.

4.17 Although most of Hereford City Centre's retail provision is located within the historic streets, there is one major shopping centre within the retail core. The Maylord Shopping Centre was opened in 1987 and accommodates 14,214 sq m (gross) of Class A1 retail uses in 46 units in addition to 225 car parking spaces. The Maylord Shopping Centre is currently occupied by a variety of national retailers including a two floor TK Maxx outlet (1,080 sq m gross) as well as several smaller independent units such as Fairy Godmother's Clothing Hire (70 sq m gross).

4.18 Whilst the level of convenience retailing in Hereford looks noticeably low when compared to the national average, it is important to understand the breakdown of this provision. Within the CSCA there are two principal foodstores, the largest of which are the 6,314 sq m gross (3,120 sq m net) Tesco on Bewell Street and the 510 sq m (gross) Iceland on Eign Gate. These units, alongside the further convenience retailing provided by Marks & Spencer's High Town store, ensures that the amount of convenience floorspace and range of goods offered is good.

4.19 In addition, within Hereford there are a number of convenience units located outside the CSCA. These units include Aldi off Eign Gate (1,160 sq m gross), Lidl at Brook Retail Park (1,220 sq m gross), Sainsbury Barton Yard (approx 6,000 sq m gross) and Morrisons on Commercial Road (4,645 sq m gross). Aldi and Lidl provide a good range of convenience goods to cater for the discount element of the convenience market.

4.20 The Morrisons store provides a wide range of convenience and comparison goods within a store that also includes a café, pharmacy, photo-processing and dry cleaning. It is located close to the train station and provides a destination shopping facility at the eastern end of Commercial Road. The Sainsburys store on Whitecross Road Barton Yard opened in 1988 and is the second largest food store in the county after the ASDA on Belmont Road. The store has a sales area of 4,884 sq m, 28 checkouts and parking provision for 417 cars. It contains a restaurant and pharmacy, whilst the range of goods on offer includes an extensive clothing range.

4.21 In addition to the multiple retailers, the City Centre has a good provision of independent/specialist retailers. Facilities include the Market Hall off High Town, which during site visits appeared well occupied by vendors and appeared popular with shoppers. The pedestrianised Church Street, which connects High Town to Hereford Cathedral, accommodates a collection of independent stores in small retail units providing a more bespoke range of services than the national multiples elsewhere in the centre.

4.22 As expected with a 'County town', there is also a significant presence of financial and property services in the city. A major concentration of such services is found on King Street and Bridge Street. The area that connects the Cathedral to the bridge crossing is almost entirely dominated by estate agents, solicitors and legal/professional services (albeit with a notable high vacancy rate – see below). Unlike the retail core, where upper floors are largely occupied by storage and ancillary space, the upper floors of the buildings in the King Street/Bridge Street area are dominated by offices, the majority of which correspond to the ground floor commercial frontage.

4.23 Using the independent MHE Shopping Index (2008) it is possible to compare Hereford to neighbouring and competing centres both within Herefordshire and beyond. As indicated in Section 2 above, towns and major shopping centres are rated using a weighted scoring system which takes account of each location's provision of retailers and anchor store strengths. This provides a basis for analysing the critical mass and marketing position of the top 6,000+ retail destinations in the United Kingdom.

4.24 The MHE Shopping Index (2008) table below summarises the sub-regional and district retail hierarchy and places Hereford within this: -

Centre	MHE Ranking	MHE Classification
Worcester	62	Regional Centre
Hereford	**66**	**Regional Centre**
Gloucester	70	Regional Centre
Abergavenny	477	District
Monmouth	590	District
Ross on Wye	731	District
Leominster	914	Minor District
Malvern	1,066	Minor District
Ledbury	1,175	Minor District
Bromyard	3,321	Minor Local
Kington	4,666	Minor Local

Source/ Notes:
(1) Management Horizons Europe (MHE) UK Shopping Index (2008).
(2) This classifications reflect nine grades of retail centres in the United Kingdom: Major City, Major Regional, Regional, Sub-regional, Major District, District, Minor District, Local and Minor Local..

4.25 The table shows that Hereford is classified as a Regional Centre and achieves a ranking of 66, which places it marginally behind the competing centre of Worcester and four places ahead of Gloucester. As is to be expected, Hereford is well ahead of the closest ranking Herefordshire market town, Ross on Wye with a ranking of 731.

Demand for Representation by Retailers and Other Commercial Operators

4.26 The initial 2007 data noted that there were 20 reported requirements for Hereford, indicating that Hereford had a somewhat low level of demand for a town of its size and status.

4.27 According to the Focus database, as of July 2010, there were 23 unique retailer requirements for Hereford, compared to 26 in April 2009. Of these, by far the largest requirement remains that from discount department store TJ Hughes, with a requirement now ranging from circa 2,300 sq.m. – 14,000 sq.m. It should be noted that the 14,000 sq.m. figure is likely to represent their largest store requirement nationwide, rather than a specific size requirement for Hereford (such a requirement would roughly equate to all the floorspace in the existing Maylord Centre). A 1,400 – 3,700 sq.m. requirement from TK Maxx is also significant, although the location of such a requirement (in-centre or out-of-centre) is not stated, and therefore it is not clear if this would be a relocation from the existing Maylord Centre unit. The remaining list of requirements includes a limited range of national retailers such as Superdrug and Poundland.

Shopping Rents and Yields

4.28 Information regarding shopping centre yields has been obtained from the Valuation Office Shopping Centre Yields July 2008 report.

4.29 The table below sets out the reported yields for the centre in the period from April 2002 to July 2008 and makes comparisons with Worcester.

Date	04/02	10/02	04/03	01/04	07/04	01/05	07/05	01/06	07/06	01/07	07/07	01/08	07/08
Hereford	5.5	5.5	5.5	5.5	5.5	5.5	5.5	5.5	5.5	5.25	5.25	5.25	5.25
Worcester	4.75	4.75	4.75	4.75	4.75	4.75	4.75	4.75	4.75	4.75	4.75	4.75	4.75

4.30 Yields within Hereford have decreased from 5.5% in 2006 to 5.25% in 2008, but over the period 2001-2005 they remained stable which is an indication of the strength of the centre. Both Hereford and Worcester have low yields indicating potential for future growth and a favourable perception by investors. Throughout the recorded time-period, Worcester has proved to be the more attractive centre as measured by yields.

4.31 The yield profile for Hereford is very much as expected for a shopping centre occupying a sub-regional position in the hierarchy of centres.

4.32 The Hereford PROMIS Report stated that at mid 2007, agent sources estimated prime rents in Hereford at £135 psf Zone A. This represented a significant increase on the end 2006 level of prime rents in the town and was a positive indicator of the strength of Hereford City Centre at that time. The latest available retail data from Focus (July 2010) indicates that this figure is now in decline, with rents falling to £120 p.s.f by June 2008 and an estimated £100 p.s.f at June 2009. The decline witnessed since 2007 represented the first fall in Zone A rents since June 1991.

Primary and Secondary Shopping Frontages

4.33 The adopted Herefordshire UDP Proposals Map shows the primary and secondary shopping frontages within Hereford City Centre.

4.34 The primary shopping frontage is identified as a swathe of streets from Eign Gate, through High Town and continuing up Commercial Street to Commercial Square. It also extends as far as the northern end of Broad Street, the majority of Church Street, St Peters Street, Widemarsh Street, and the area of Trinity Square/Maylord Shopping Centre.

4.35 Street RankingsTM identifies multiples located in shopping streets and allocates an attraction value based on sales density and average selling area. Using these values, streets within a centre are ranked. The Street RankingsTM top three streets within Hereford City Centre are High Town, Eign Gate and Commercial Street.

4.36 The primary shopping frontage is predominantly retail with some vacant outlets interspersed along the frontage. The secondary shopping frontages, as identified by the UDP Proposals Map, are the remainder of Broad Street to the Cathedral grounds, one side of King Street and Bridge Street, the majority of St Owens Street, Union Street and Commercial Road as far as the Odeon Cinema.

4.37 The secondary shopping frontages contain a much more diverse range of occupiers with a range of service occupiers operating alongside the convenience and comparison retailers. Beyond the Primary and Secondary Frontages service uses become more dominant. Of particular note are streets such as King Street and Bridge Street where estate and letting agents represent the majority of occupiers.

Vacant Street-level Property

4.38 Town centres are constantly evolving and vacant units provide opportunities for retailers to locate in such centres and add to the diversity of retailer representation. Vacant units are therefore not necessarily a sign of stagnation or weakness; they are a function of the economic cycle within all retail centres.

4.39 A site visit by Drivers Jonas in September 2007, confirmed the number of vacant units within Hereford City Centre stood at 49 units. This vacancy rate accounted for 9.6% of the total number of units within the CSCA and was below the national average of 10.8% and an indication of the health of the centre.

4.40 The table below demonstrates the levels of vacancy in Hereford 2000-2009, based on GOAD data and indicates the fluctuation in vacancy levels. It should be noted that these figures are based on GOAD data and encompass areas beyond the defined UDP CSCA.

Year	Vacant Retail Floorspace (sq ft)	Vacant Retail units	Vacant as % retail floorspace
2000	37,900	32	4.7
2003	62,500	50	7.3
2006	80,100	60	7.5
2009	127,100	76	12

4.41 A site visit by Drivers Jonas in April 2009, confirmed the number of vacant units within Hereford City Centre had risen from 49 units in September 2007 to 59 units. The most recent GOAD survey in November 2009 noted that the level of vacant floorspace stood at 127,100 sq.ft. representing 12% of total space. A significant element of this floorspace increase is of course the result of the closure of Chadds (see above). As of July 2010, the number of vacant units stood at 60, although a number of these were in the process of being refurbished.

4.42 In addition to changes within the local retail market, Hereford's vacancy rate has been particularly affected by wider retail market trends which have caused some national multiple retailers to close. Most noticeable was the closure of Woolworths (1,348 sq.m. sales) on Eign Gate, the relatively new Zavvi store on Commercial Street, Adams in the Maylord Centre and the Priceless Shoes store fronting High Town. As a consequence, several of the city's larger and most prominent retail units became vacant, although many, like the examples mentioned, resulted from national rather than local circumstances.

4.43 There has been some evidence of recovery since 2009. As of July 2010, HMV has replaced Zavvi, whilst Peacocks are scheduled to occupy the former Woolworths unit on Eign Gate. The introduction of the latter should enhance the attractiveness of Eign Gate area by increasing the number of shopper visits.

4.44 Since the initial survey three areas in particular within the City Centre are showing signs of stress. An increased vacancy rate is noticeable on Commercial Street, which despite its prime location contains five vacant units (formerly A1). Additionally, the nearby Maylord Centre suffers from a high proportion of vacancies (in the internal 'Atrium' area of the centre), with four prominent vacancies within the ground floor.

4.45 The other area of concern is Bridge Street, where there has been a marked increase in vacancies since the initial survey. The 2007 survey revealed 6 vacancies on this street. However at July 2010 this figure had risen to 12 units, including an unbroken stretch of 4 consecutive vacant units. Although Bridge Street has traditionally been services dominated, rather than A1 retail, the high level of vacancy has implications for footfall and the street's future attractiveness to potential tenants.

Pedestrian Flows

4.46 A pedestrian flow count report was undertaken by PMRS on a Friday and Saturday in June 2005. Pedestrian footfall data was collected at 30 positions throughout the City Centre. Of these the locations, the position outside Marks and Spencer in High Town recorded the busiest footfall with a footfall figure of 16,800 persons on the Friday and 32,700 persons on the Saturday.

4.47 Over the week footfall at this location was 116,470 persons which is 115% higher than the average flow. The lowest pedestrian flow count in the town centre was recorded at 21 Union Street with a footfall 73% below average. As expected, the PMRS data largely conforms to the identified primary and secondary shopping frontages.

4.48 When plotted on a map of the centre, the footfall numbers are greatest around High Town and Commercial Street. Generally speaking, the further away from these streets, the smaller the footfall. It is interesting to note that although Primary Frontage, the count on Church Street was significantly lower than other primary streets. This probably reflects the narrow width of the street and the higher number of specialist retailers on the street.

4.49 These results have been further supported during additional site visits by Drivers Jonas Deloitte, with this area of High Town being the busiest during the visit.

Accessibility

4.50 Hereford is very well served by public and private transport. The County road network focuses on the City, with the A49 providing north / south links via Leominster and Ross-on-Wye. The City Centre is widely accessible by public transport with both train and bus stations situated on Commercial Road providing local, regional and national connections.

4.51 The parking provision in Hereford City Centre is good with 3,052 spaces in public car parks, with 60p for one hour being a general price line.

4.52 Provision for cyclists is generally good in Hereford with cycle racks provided in key areas of the City Centre. There are however no dedicated cycle routes through the retail core and the routes which do run through the City Centre are on the fringe and heavily trafficked.

Perception of Safety and Occurrence of Crime

4.53 West Mercia Police Divisional HQ is located on Bath Street, within the CSCA. During site visits the police presence in the centre has been noticeable with both police officers and community support officers regularly patrolling. It should be noted that the initial 2007 site visit coincided with a Flower Festival and that the number of visitors and thus police was perhaps above average at that time.

4.54 There is extensive CCTV coverage in Hereford City Centre. However this does not appear intrusive to users and is often discreetly positioned.

4.55 According to the Herefordshire CCTV Annual Report 2006/2007, there were 3,137 incidents in Hereford recorded by CCTV. The breakdown of these figures shows that 1,174 of the incidents took place between 20:00 and 00:00 with the CCTV camera at the Marks and Spencer store recording the highest number of incidents (387). This is not surprising given that the PMRS data indicated this to be the busiest pedestrian area in the City Centre. The 2009/2010 report noted that the level of incidents had risen to 4,230.

4.56 There was no obvious evidence of graffiti in the town centre and the centre appeared to be well lit.

Centre Environmental Quality

4.57 Much of Hereford's CSCA falls within a Conservation Area, which has helped maintain the centre as an attractive destination with a variety of architecturally interesting buildings.

4.58 The centre benefits from extensive areas of pedestrianisation, especially in High Town where the open paved square accommodates seasonal outdoor cafes as well as being used as an exhibition space.

4.59 The pedestrianised shopping areas provide a relaxing and comfortable shopping environment. The areas on the fringe of the centre facing the ring road suffer from the lowest environmental quality. The ring road acts as a barrier to movement with limited at grade crossing points. This is especially apparent at the junction of Eign Street and Victoria Street, where the ring road can be crossed safely only by a pedestrian subway, leaving the area to the west of the ring road isolated from the City Centre. These fringe locations facing the ring road are also affected by the noise and disturbance generated by passing traffic.

4.60 The environmental impact of the ring road is demonstrated by the designation of the A49 corridor through Hereford as an Air Quality Management Area (AQMA). As such the corridor is noted as having levels of the pollutant nitrogen dioxide that exceed government recommendations. The boundary of the AQMA follows the A49 from Newtown Road in the north of the city as far south as the junction with the A465. The AQMA also covers Eign Street to the west of the City Centre and the Newmarket St/Blueschool St sections of the ring road.

4.61 Street furniture, planting and trees are provided throughout the centre which enhance the physical environment and attractiveness of the centre.

4.62 The quality of pedestrian entrances to the City Centre is varied. For visitors arriving at the train station, the route into the City is unclear. Entry to the City is initially dominated by the Morrisons store, though once pedestrians reach Commercial Road the route is much clearer. The Commercial Road / ring road junction then creates a difficult crossing point for pedestrians.

4.63 The entrance to the City Centre into Eign Gate is particularly poor, with visitors having to use a pedestrian subway to cross the Ring Road, which forms a barrier to the retail units located along Eign Street. Conversely however, arrival into the City Centre along St Owen Street is legible and pleasant for pedestrians.

Development Plan Allocations, Proposals and Commitments

4.64 The adopted Herefordshire UDP (2007) states that its primary aim is to retain Hereford's status as a sub regional shopping centre, and identifies various requirements to achieve this, including potential areas for new development.

4.65 A key proposal for the City Centre is regeneration of the area known as the Edgar Street Grid comprising 43 hectares of land bounded by Edgar Street to the west, Newmarket Street and Blueschool Street to the south, Commercial Road to the east and the railway line to the north. The proposed redevelopment of the Cattle Market forms Phase 1 of this scheme. We understand that the selected developer Stanhope remains committed to making a planning application for this development by the end of 2010 and that their proposals will contain some 23,000 sq m gross floorspace and include a small concept department store, a medium sized food store and a multi-screen cinema, as well as 15 or so shops and some restaurant units.

4.66 The UDP includes a number of development and land use proposals based on the Grid Master Plan. A brief summary of the sites covered in the Plan is provided below.

Eign Gate

4.67 Policy TCR20 covers the Eign Gate regeneration area and states that land within this area provides a major opportunity for further development to support the vitality and viability of the City Centre. The area is identified as the preferred location for Class A1 retail development. In particular, the UDP seeks further comparison retail opportunities at Bewell Street, should opportunities arise. This has been achieved with the recent development of All Saints Court on Bewell Street that now accommodates four retail units including 'Animal'. The plan also advocates further comparison retailing in the Berrington Street area.

Canal Basin & Historic Core

4.68 This area is situated in the north eastern part of the Grid area between Widemarsh Street and the railway station and historically included the terminus basin of the Herefordshire and Gloucestershire Canal. It is covered by policy TCR21.

4.69 The UDP supports a mixed use scheme is proposed in this area comprising high density housing, canal basin wharfage, visitor centre, as well as complementary retail/leisure uses including bars, restaurants, and a hotel. It is expected that 180 dwellings will be provided within the plan-period. A high quality design is required reflecting its waterside location and industrial heritage.

Hereford United Football Club

4.70 This area is bounded by Edgar Street to the west, by the rear of residential properties fronting Edgar Street and Newtown Road to the north, by Blackfriars Street to the south, and by Widemarsh Street to the east.

4.71 As described in policy TCR22, the area is identified for cultural and leisure development. Development proposals should include the redevelopment of the existing Football Club stadium, complementary leisure based development including a multiplex cinema, accompanied by related Class A3 to A5 developments and car parking provision.

Civic Quarter

4.72 Policy TCR23 covers the area between Blueschool Street and Coningsby Street within the central shopping and commercial area known as the Civic Quarter. The UDP identifies the site for comprehensive development based on public/commercial offices and library possibly incorporating some ground floor ancillary retail and leisure uses.

4.73 Further development here should seek to address the difficulties posed to pedestrians by the inner ring road and promote movement through the area into the remainder of the Edgar Street Grid.

Land at Commercial Road

4.74 Policy TCR26 covers land at Commercial Road, which is expected to be freed through the integration of bus interchange facilities within the City allowing the existing Country Bus Station site to be redeveloped. The land is identified for mixed use office/leisure development.

Soft areas and potential development sites

4.75 We have referred above to key areas within the City Centre identified within the UDP that have potential for further development or redevelopment.

4.76 We have not identified any additional soft areas or potential development sites of merit as part of this health check.

City Centre Health Check Summary

4.77 The initial health check noted that Hereford City Centre was a healthy and attractive centre which plays an important role in the region. Whilst the City Centre clearly continues to perform this role and to provide a good mix of national multiple retailers and independent stores, the level of provision has suffered since 2007, and the centre remains vulnerable to any further downturn in the retail market.

4.78 Declines in rents, the closure of Chadds and the other prominent vacancies within the City Centre will have had some affect on the attractiveness of Hereford to shoppers and retailers alike, and possibly the City's ability to compete with nearby centres. It should however be remembered that the economic downturn has in no way been unique to Hereford, and that competing centres are also experiencing similar economic problems.

4.79 The City Centre still provides a good range of comparison and convenience retailing with a good mix of national multiple retailers and independent stores. This provision is supported by a wide range of other town centre uses that reflect Hereford's role as a tourist destination for the region.

Neighbourhood Centres

4.80 The shopping hierarchy within Hereford City includes the following 'neighbourhood shopping centres':

Belmont

Bobblestock

Chilton Square

College Green

Folly Lane (Whittern Way)

Grandstand Road

Holme Lacy Road

Hinton Road

Old Eign Hill

Oval

Quarry Road

Whitecross

4.81 These centres focus on the day to day convenience needs of nearby residential areas, mostly containing small foodstores and services. We have not undertaken specific health check of these centres.

Out-of-centre Foodstores

4.82 Data on floorspace is based on the IGD list of food stores and information gathered from Drivers Jonas site visits in September/October 2007.

ASDA – Belmont Road, Hereford

4.83 The ASDA store on Belmont Road is the largest food store in the County. Opened in 2006 the store has a gross area of approximately 7,000 sq m of which the sales area accounts for 4,131 sq m

4.84 The store provides an extensive range of goods including large sections of clothing and some bulky goods. In addition the store also contains a café, pharmacy and photo processing laboratory.

4.85 The store is supported by a large car park and is open 24 hours between Monday and Friday. Adjacent to the store is a Dental Access Centre, which shares the ASDA car parking and access.

4.86 Condition seven of the planning permission for the store states that the sale of non food or non convenience goods shall not take place from more than 40% of the total net sales area of the food store. Condition 38 adds that there shall be no insertion of any additional retail floorspace, including a mezzanine floor.

Tesco – Abbotsmead Road

4.87 The Tesco store on Abbotsmead Road opened in 1989. The store has a gross area of approximately 4,480 sq m of which the sales area accounts for 2,525 sq m. There are 28 checkouts and the store is able to trade 24 hours a day between Monday and Friday.

4.88 The store contains a pharmacy, café and photo processing facilities and also retails an extensive range of comparison goods including clothing and some bulky goods. Based on Drivers Jonas site visits it is estimated that comparison floorspace accounts for around one sixth of the total sales floorspace. Site visits also noted that the store is well used with checkout queues 2-3 persons deep during the early morning period.

4.89 The store provides circa 400 parking spaces, as well as a petrol filling station and car wash.

Retail Parks

Brook Retail Park

4.90 Brook Retail Park is located approximately 140m from the CSCA boundary and comprises approximately 2,900 sq m (gross). The retail park is currently occupied by three anchor tenants - Blockbuster (400 sq m net), Pets at Home, (500 sq m net) and Lidl (854 sq m net). The former Tiles R Us unit (400 sq m net) is currently vacant (2010) following temporary occupation by ‘Hyper Extra’ variety store.

4.91 The original planning permission for the site, obtained in 1997 was for the erection of two buildings for Class A1 retail comprising a total of 2,926 sq m. One building comprised 1,345 sq m for Class A1 non food retailing and the second building some 1,579 sq m to be subdivided into food and non food units. The application was permitted subject to 20 conditions, the key ones of which restricted the type of goods that could be retailed to food or bulky goods and restricted subdivision.

4.92 In December 2006 planning permission was granted on appeal for the variation of condition 2 attached to the original planning permission (HC970294/PF/E) relating to Unit A2. The variation allowed the range of goods that could be sold to be extended to allow the sale of clothing and footwear from the unit and to remove the ‘catalogue only’ retailer clause.

Hereford Retail Park

4.93 Hereford Retail Park is located approximately 1.5 km from Hereford City Centre and comprises circa 6,302 sq m (gross) of Class A1 retail. The retail park comprises four retail warehouse units and a separate restaurant outlet.

4.94 The original planning application for the retail park was registered in November 1997 and sought permission for the erection of 4,646 sq m of Class A1 non food retail buildings together with a fast food restaurant and formation of parking areas, service area, access and landscaping. The application was called in for consideration by the Secretary of State.

4.95 The planning permission was granted subject to conditions, which restricted comparison goods sales to bulky goods only and prohibited sub division of units.

4.96 The current tenants at the retail park are Carpetright (890 sq m), Harvey’s (440 sq m, also has 80% mezzanine), which includes Sleepmasters (430 sq m), Currys (1,580 sq m), PC World (1,610 sq m), and Pizza Hut (360 sq m). (Floorspace obtained from GOAD, shown as gross).

4.97 The planning condition controlling the further subdivision of the units to not less than 900 sq m serves to control the effect that further sub-division could have on the City Centre.

4.98 To the north west of Hereford Retail Park there are two additional vacant retail units. These were previously occupied by Floors to Go (500 sq m gross) and Motor World (500 sq m gross).

Holmer Road Retail Park (Spur Retail Park)

4.99 The Holmer Road Retail Park is currently undergoing partial re-configuration and redevelopment. The B&Q store (circa 7,500 sq m) relocated in autumn 2007 to new premises just to the north of the its former premises.

4.100 The Council granted planning permission for the original retail warehouse units including the former B&Q store in November 1988. The consent was subject to a condition that basically restricted retail sales to bulky goods.

4.101 Planning permission was granted in December 2006 for refurbishment of the former B&Q unit, dividing it into two, and constructing a new unit on the site of the former garden centre.

4.102 A subsequent appeal to relax the condition restricting sales so as to permit occupation by Next and Argos was dismissed in on 15 January 2008. The Inspector concluded that the proposal, would prejudice the implementation of the Edgar Street Grid, which would be harmful to the future vitality and viability of the CSCA.

4.103 On land to the north of the retail warehouses and to the rear of the new B&Q store, an outline planning application for the development of 3,623 sq m of additional A1 space was also approved by the Council in March 2006, subject to retail sales being restricted to bulky goods.

4.104 Two applications were submitted in October 2006 to vary this condition. One application sought a relaxation consent for part of the floorspace to be used for the sale of sports goods and as a fitness centre. The other application sought a relaxation of the goods conditions to allow the sale of goods associated with a catalogue retailer, and the sale of clothing and footwear respectively.

4.105 Both applications were refused on grounds including detriment to the vitality and viability of the CSCA. The Council's refusal of planning permission was supported on appeal in a decision issued by the Planning Inspectorate on 5 December 2007.

4.106 Re-configuration and redevelopment of the park is complete and the park has been rebranded as Spur Retail Park. As part of the reconfigurations, Maplin have opened a store on the park (circa 450 sq m gross), immediately adjacent to Halfords (929 sq m gross). The three newly created retail warehouse units remain vacant.

Salmon Retail Park

4.107 To the south of the Holmer Road retail park are a number of existing retail units including B&M Bargains who replaced MFI following their nationwide collapse (1,400 sq m), Dunelm (1,160 sq m also has 50% mezzanine) and Dreams (720 sq m) - floorspace obtained from GOAD, shown as gross. These retail units are known as the Salmon Retail Park.

4.108 The original outline planning permission for the erection of three Class A1 retail stores with associated parking and access on land to the south of Perseverance Road and Holmer Road junction was issued in 1993. Planning conditions restricted sales to bulky goods (other than in the unit identified in the permission as Currys) and limited unit size to no less than 7,500 sq ft .

4.109 To the south of these units lies two further retail units, Comet (1,480 sq m gross) and Bensons for Beds (720 sq m gross).

4.110 To the rear of these units is a trade park, predominantly accommodating industrial uses, such as catering suppliers. Here there is one retail unit occupied by Beds and Mattresses Direct extending to some 600 sq m gross including a showroom of circa 300 sq m.

Belmont Road

4.111 Located on Belmont Road is a small collection of retail units incorporating Farmfoods (400 sq m net), Bathstore (400 sq m net), Dominos Pizza (100 sq m net), and Carphone Warehouse (100 sq m net).

4.112 This retail park provides a modern retail environment with car parking to the front and good circulation space at the time of our visit around midday.

Freestanding Retail Units & Significant Office/Leisure Developments

4.113 Discussions with the Council have indicated that there have been no major purely office developments in the County since the 1970s. There have, however, have been some large scale developments that include office units. There are no large out-of-centre entertainment parks in Herefordshire.

Moreton Business Park

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

Holmer Park

4.115 Holmer Park is a large spa and health club complex located near Hereford railway station. The complex, which has a membership of circa 750 people, includes a swimming pool, gym, café-bar, tennis and volleyball courts as well as conference facilities.

Wye Leisure Health Club

4.116 Wye Leisure is a private health and leisure complex located in Fownhope on the outskirts of Hereford. The club has circa 250 members.

Countrywide Farmers County Store

4.117 This freestanding unit is located on Mortimer Road, off Newtown Road, north of the City Centre. The store retails a variety of agricultural supplies including equestrian supplies, country clothing and garden machinery.

5 Ross-on-Wye

Town Overview

5.1 The adopted UDP classifies Ross-on-Wye as a Market Town under the County's retail hierarchy. Street RankingsTM identifies The Maltings, Broad Street and Market Place as the top three retail streets.

5.2 Shops within Ross-on-Wye town centre are mainly accommodated in ground floor units, thus providing accessible retail facilities. In addition, the centre can be easily accessed by a number of modes of transport, including cycling, train and bus.

5.3 Ross-on-Wye has had a long historical association with tourism. However in recent years the town has suffered from competition, and several of the tourist attractions of the town such as the Lost Street Museum and Button Museum have closed.

Town Centre Health Indicators

The Quantity and Quality of Retailing and Other Commercial uses

5.4 Ross-on-Wye accommodates a range of retail facilities which are discussed below. In addition to retailing, the centre also contains a range of retail facilities and activities which reflect the importance of tourism to the centre. There is a public library on the edge of the town centre and a small museum in the Market House.

5.5 The overall mix of uses within Ross on Wye town centre at 2007 is summarised in the table below, based on data from GOAD and a Drivers Jonas site visit in October 2007

Sector	No. of Units	% of Units	National Average %
Convenience	15	6.9	9.2
Comparison	98	45.4	45.5
Service	71	33.9	33.2
Other	4	1.9	1.3
Vacant	28	13	10.8
Total	218	100	100

Source/notes:
(1) The categories are based on the classification provided by GOAD, relate to ground floor uses only and are based on data obtained by site visit in October 2007. Data on UK averages has been provided by GOAD (October 2007).
(2) Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services, building societies, estate agents and valuers. Taxi offices are also included in the service category, although this use is not categorised by GOAD.
(3) Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis, therefore for the purpose of comparison, these have been excluded from our analysis.
(4) 'Other' category includes employment agencies, tourism offices and main and sub-post offices.

5.6 It should be noted that the national average figures provided by GOAD do include areas beyond designated town centre boundaries, but for the purposes of this analysis we have only identified units within the UDP CSCA. Significant units beyond this boundary are discussed below.

5.7 The above table demonstrates that the dominant uses within Ross-on-Wye were comparison shops and services. Service uses comprised 33.9% of the total units within the centre, which was marginally higher than the national average of 33.2%. Similarly the level of comparison uses was very close to the national average.

5.8 The level of convenience retail in Ross-on-Wye was slightly below the national average. As previously mentioned however, the figures in the above table do not include retail outside the CSCA. It should be noted that there is a large Morrisons store which lies within a short distance of the CSCA. This store is approximately 3,406 sq m (gross) with a sales area of approximately 2,313 sq m.

5.9 Within Ross-on-Wye town centre, there are also a number of 'town centre' facilities that are used after shopping hours for activities such as eating and drinking. In particular, there are historic public houses such as King Charles II on Broad Street and the Kings Head on High Street. National pub chains are generally not present in Ross-on-Wye, although the Wetherspoons chain own and operate a large public house on Gloucester Road. In terms of other leisure uses, there is a swimming pool located beyond the CSCA boundary, but there is currently no purpose-built cinema in Ross-on-Wye, though 'flicks in the sticks' operate from St Mary's Church Hall adjacent to the town centre. Overall we consider that the variety of out-of-hours activities within the centre is fair.

5.10 Tourism still plays an important role in the town centre economy. The centre contains many independent niche retail units which cater for, and create a market for, tourists visiting the centre. Of particular interest during the 2007 survey was Grandma Peggy's sweetshop (180 sq m gross) which served traditional sweets, but also had a significant area of its floorspace devoted to a small local museum. This has since ceased trading.

5.11 There are also a significant number of antique, retail galleries and gift shops in the centre. Many of these units are located in the area between Market Place and St Mary's Street. Within a short distance there are a number of retailers including Gallery 54 (140 sq m gross) and Waterfall Antiques (60 sq m gross). There are similar units interspersed throughout the town centre, further emphasising the importance of visitors to the local economy.

5.12 The June 2010 inspection indicated a noticeable improvement in the overall health of the prime pitch. Whilst the presence of four charity shops along a relatively short stretch of Broad Street continues to indicate the weakness of Ross-on-Wye's retail offer, the introduction of a number of new operators has had a noticeable positive effect on the centre. The opening of a number of cafes such as national chain Costa Coffee alongside a number of regional/independent operators such as Café Elegance has increased the attractiveness of the centre to visitors. Additionally, there are a number of new retail operators within the town, including Tudor Sweets replacing a prominent vacancy in Market Place, and national operator Shoe Zone taking a unit in The Maltings.

Representation by retailers and other commercial operators

5.13 There are several national multiple retailers located within Ross-on-Wye, including W H Smith, Boots and Argos. However according to the Focus Town Centre Report, the Centre contains only 30% of the top 20 retailers.

5.14 The centre also has a large independent sector, including several small convenience goods retailers. As mentioned previously, there are also a number of independent antique shops, gift shops and art galleries, reflecting the importance of tourism to the town.

5.15 Convenience provision within the CSCA is led by a Sainsbury (formerly Somerfield) food store located within The Maltings Shopping Centre. The store has a sales area of 1,069 sq m. Outside the CSCA there is a large Morrisons food store located approximately 250m walk from Somerfield. This is substantially larger than Somerfield at approximately 3,406 sq m (gross), with a sales area of approximately 2,313 sq m.

5.16 Since the initial survey, there have additionally been a number of changes in the current convenience retailers, including Sainsbury's taking over the former Somerfield unit within The Maltings. In the summer 2008 the Council received a planning application for a 1,002 sq m net floorspace extension to the Morrisons store on the edge of the town centre. This was to increase the floorspace of the store devoted to the sale of convenience and comparison goods, as well as storage areas. Construction of the extension is now underway. Additionally, the approval of an Aldi store (1,312 sq.m. gross / 900 sq.m. sales) on Brookend Street will significantly increase the level of convenience retail floorspace within the centre, and help address the high vacancy level in this area.

5.17 All major banks are represented in Ross and in addition the centre has a wide range of service uses including hairdressers, opticians and professional services.

5.18 The MHE Index (2008) classifies Ross-on-Wye as a District Centre and ranks it 731. This places Ross-on-Wye ahead of Leominster and Ledbury in the ranking, but significantly behind Hereford (ranked 66). A detailed comparison of MHE performance across the region is provided in the Health Check of Hereford provided in Section 4.

Demand for Representation by Retailers and Other Commercial Operators

5.19 The level of retail requirements had stayed relatively stable in the period 2002 -2007. At the time of the initial survey, Focus noted that there were nine retailers with requirements in Ross-on-Wye. Of these The Original Factory Shop was the largest requirement with a unit of between 565 sq m and 1,859 sq m (gross).

5.20 The latest information from Focus regarding retail requirements states that as of July 2010, there were five retail requirements within Ross-on-Wye, down from 10 requirements in January 2009 and thus a relatively low level of demand when compared with 2006/2007 levels. Of these five requirements, two are from charity shop operators, with an additional requirement by 'Neat n Cheap', further reflecting concerns over the quality of the retail offer. The remaining requirements are from Dolland & Aitchison Opticians, and Guardian Jewellery.

Shopping Rents and Yields

5.21 Information regarding shopping centre yields has been obtained from the Valuation Office (July 2008). The table below sets out the reported yields for the centre in the period from April 2002 to July 2008.

Date	04/02	10/02	04/03	01/04	07/04	01/05	07/05	01/06	07/06	01/07	07/07	01/08	07/08
Ross	8	8	8	8	8	8	8	7.5	7.5	7.5	7.5	7.5	7.5

5.22 Yields within the centre have remained stable, with a slight reduction from 2006 to 7.5%, suggesting investor confidence and buoyant national economic conditions at that time. For a town of its size, the centre can be seen as performing reasonably.

5.23 Retail rental level data is not available for Ross on Wye post-2008. However Zone A rents had stayed at around £40 psf between 2007 and 2008.

Primary and Secondary Retail Frontages

5.24 The UDP defined primary shopping frontage encompasses the Market Place as far as Church Street and extends down Broad Street to Station Street. In addition The Maltings Shopping Centre is also classed as Primary Frontage, as is Gloucester Road up to the junction with Cantilupe Road.

5.25 The Proposals Map also identifies a secondary frontage for Ross-on-Wye. Three areas are identified, Gloucester Road between Hill Street and Chase Road, the junction between High Street and Church Street, and Brookend Street.

5.26 As Broad Street descends from the Market Place changes in the frontages can be seen. The area around the Market Place is largely occupied by national retailers such as Boots and WH Smith. Further away from the Market Place and in the secondary frontages, the mix of units becomes more diverse with independent retail units interspersed with takeaways, dwellings and other non-town centre uses.

5.27 Ross-on-Wye contains one dedicated shopping centre, The Maltings which is considered primary frontage. Opened in 1987, The Maltings comprises 3,762 sq m and is anchored by the Sainsbury's store mentioned previously. It is predominantly occupied by national multiple retailers including Argos (110 sq m gross), Dorothy Perkins (130 sq m gross) and Clinton Cards (120 sq m gross). The most recent tenant to take space in the centre was national retailer Holland & Barrett (97 sq m gross).

Vacant Street-level Property

5.28 The site visit undertaken by Drivers Jonas in September 2007 identified 28 vacant units within Ross on Wye. The majority of the vacant units, with the exception of those in The Maltings, were small in size suggesting that their size gives them limited commercial appeal, especially to national multiple retailers. In addition to vacant units the 2007 survey noted concentrations of charity shops in the centre, including the concentration of five charity shops on Broad Street between Market Place and The Maltings Shopping Centre.

5.29 The 2009 field survey noted that the vacancy rate had remained the same, although there had been notable changes in the distribution of these units and the types of retailers that Ross-on-Wye had lost. The collapse of national multiple chains due to wider economic troubles significantly contributed to this change in retailer representation within Ross-on-Wye. The loss of the Woolworths Store (460 sq m gross / 316 sq m sales) and Priceless Shoes (230 sq m gross) had added two relatively large vacancies to the shopping frontages and further eroded the appeal of the Primary Shopping Area. The Woolworths store has however now been relet to Carpetright, although given the speciality of the offer, this is unlikely to have the same broad consumer appeal.

5.30 At the time of the June 2010 survey, the level of vacancy stood at 27 units. This increased level of vacancy does not, on its own, tell the full story of the town centre's health. The spatial distribution of vacancies is of particular note, with 33% of vacancies (12 units) located on Brookend Street, toward the fringes of the retail area. Of these 12 units, three form part of the Aldi development site, whilst five are within the small Parma Court arcade.

Pedestrian Flows

5.31 No PMRS data is available for Ross-on-Wye. However, visits to the town centre indicated that the Market Place section of Broad Street was the busiest pedestrian area. Pedestrian numbers were much smaller on High Street nearest to St Mary's Church whilst Brookend Street also had small levels of pedestrian activity.

Accessibility

5.32 Ross-on-Wye is easily accessible within the region and is situated on a traditionally important communication route. The town is located near the A40 and A49 as well as being close to Junction 1 of the M50 which connects the town to the wider national motorway network.

5.33 Although there is no railway station in Ross-on-Wye, there are a number of regional bus services which operate through the town providing connections to other regional centres such as Hereford.

5.34 The main retail streets such as High Street and Broad Street are not pedestrianised, but traffic speeds are low and traffic does not impinge on shopping activity too greatly, particularly in the primary frontage. Traffic is diverted around the Market Place creating a relatively large traffic free space which improves the streetscape and the setting of the historically significant Market House. The town centre does contain several smaller traffic-free precincts and courtyards such as Croft Court and Palma Court.

5.35 There are car parks off New Street, Henry Street, Kyrle Street and Brookend Street, with car parking charged from 40p per hour for short term parking. There is also extensive on-street parking with waiting time limited to one hour.

Perception of Safety and Occurrence of Crime

5.36 According to the Herefordshire CCTV Annual Report 2009/2010, there were 433 incidents in Ross-on-Wye recorded by CCTV. It is important to remember that this figure is not a crime statistic but does indicate the level of proactive monitoring that occurs. CCTV was largely discreet although in areas such as Croft Court cameras were more evident given the seclusion of the area.

5.37 The active traffic frontages increase the perception of safety and keep the streets active. There are few signs of crime or graffiti and the centre is generally not considered to be intimidating or having a high fear of crime.

Centre Environmental Quality

5.38 Ross on Wye town centre is generally of a high environmental quality and is a Conservation Area. The centre has a number of historic buildings and relatively limited number of buildings of poor architectural quality. There are numerous buildings of architectural and historic significance typified by the 17th century market hall, below which a market is still held on Thursdays and Saturdays each week.

5.39 The town streetscape was refurbished in 1998 when numerous engraved information boards were erected to inform visitors of the town's history and inhabitants. Although the historic environment does create a largely attractive environment, compared to some of the other historic market towns in Herefordshire such as Ledbury, the appearance of some parts of the town, e.g. Brookend Street, is tired and unkempt.

Development Plan Allocations, Proposals & Commitments

5.40 Other than a housing site, now developed, the UDP contains no development site allocations within Ross-on-Wye town centre.

5.41 A proposed Aldi store (1,312 sq.m. gross / 900 sq.m. sales) looks set to replace the garage premises at the lower end of Brookend Street.

Soft areas and potential development sites

5.42 From our appraisal of Ross-on-Wye town centre, there is a potential development site off Kyrle Street/Brookend Street, part of which lies outside the CSCA. The land lies between Brookend Street (the site of the proposed discount foodstore) and the Leisure Centre: much of it is devoted to Council owned car parking. This area is well located for further retail development that would enhance the vitality and viability of the northern part of the town centre.

5.43 There are also other 'soft areas' on the northern fringes of the town centre outside the currently defined CSCA. These include a depot, which was formerly occupied by JS Carpets, prior to their relocation to new premises close to the Morrisons foodstore.

5.44 We understand that there are flooding issues that would need to be addressed in the context of any proposal for built development in this part of the town centre.

Town Centre Health Check Summary

5.45 Ross-on-Wye, is historically an important town centre for the local community and the tourist economy. There are clear strengths within the centre. The Conservation Area and variety of architectural styles create a pleasing built realm for shoppers. The mix of retail services is good and independent provision offers a selection of niche retailers such as antique stores and gift shops.

5.46 The initial 2007 health check noted that despite some clear strengths, Ross on Wye town centre did have some weaknesses, reflected particularly in the vacancy level and quality of retailers. Although the vacancy level has risen, the centre has recovered relatively well (in the context of the wider economic downturn) and shows signs of improvement in its overall offer, particularly in the prime retail areas.

5.47 Addressing these identified weaknesses further will be necessary to retain the standing of Ross-on-Wye in the local retail hierarchy and tourism market.

Out-of-centre Retail and Leisure Uses

Over Ross Park

5.48 Over Ross Park is a out-of-centre retail park which contains two large retail units currently occupied by Ross Labels and Focus Do It All.

5.49 Ross Labels is a large department store predominantly offering factory outlet clothing with a variety of brand names. The store has a net floorspace of 6,768 sq m and contains a mezzanine level which covers the entirety of the ground floor. It also incorporates a café and toilet facilities and clearly functions as a tourist facility in addition to serving the local community. There is parking provision for circa 200 cars.

5.50 The second unit in the park is occupied by Focus Do It All DIY store and garden centre with a gross floorspace of 2,834 sq m and parking provision for 150 cars.

Premier Inn – M50 junction

5.51 A Premier Inn is located approximately one mile outside the town centre on the roundabout near the M50. There is a Beefeater restaurant adjoining the hotel.

6 Ledbury

Town Overview

6.1 The adopted UDP classifies Ledbury as a Market Town under the County's retail hierarchy. The retail area of the town centre is largely centred along The Homend / High Street with secondary provision located on intersecting streets.

6.2 Shops within Ledbury town centre are mainly accommodated in ground floor units. There are a large number of historic buildings, some of which because of their location and configuration can limit ease of access for wheelchair users or the mobility impaired.

6.3 The town centre can be easily accessed by a number of modes of transport, including cycling, train and bus.

Town Centre Health Indicators

The Quantity and Quality of Retailing and Other Commercial Uses

6.4 Ledbury accommodates a range of retail facilities that are discussed below. In addition to retailing the centre is also a popular destination for tourists with several buildings offering tourist attractions including the Council run Ledbury Heritage Centre.

6.5 The overall mix of uses within Ledbury town centre at 2007 is summarised in the table below, based on data from GOAD and a Drivers Jonas site visit in October 2007

Sector	No. of Units	% of Units	National Average %
Convenience	16	10.7	9.2
Comparison	66	44.3	45.5
Service	60	40.3	33.2
Other	2	1.3	1.3
Vacant	5	3.4	10.8
Total	149	100	100

Source/notes:
(1) The categories are based on the classification provided by GOAD, relate to ground floor uses only. Data on UK averages has been provided by GOAD (October 2007).
(2) Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services, building societies, estate agents and valuers.
(3) Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis, therefore for the purpose of comparison, these have been excluded from our analysis.
(4) 'Other' category includes employment agencies, tourism offices and main and sub-post offices.

6.6 This table demonstrates that the dominant uses within Ledbury were comparison shops and services. Service uses comprised 40.3% of the total units within the centre, which was significantly higher than the national average of 33.2%. Figures for convenience and comparison retailing were broadly consistent with national averages.

Representation by retailers and other commercial operators

6.7 There are limited national multiple retailers located within Ledbury. The age and inflexibility of some of the historic buildings make them difficult to meet the needs of modern retailing. One such example is the Boots store on High Street, the interior of which seems tight and constrained by the limited floorspace of one of Ledbury's most prominent historic buildings.

6.8 As with the other major market towns, the most noticeable change to retail provision in Ledbury since the initial study has been the closure of the Woolworths store. This unit represented a sizeable vacant space relative to other units in Ledbury with circa 255 sq m sales floorspace and a further circa 213 sq m of stock/ancillary space. Although the store was the smaller Woolworths Local format, its loss did raise some concern over the implications for the range of goods on sale in Ledbury. However, by the time of the July 2010 survey 'Wellworth It' had opened in the former Woolworths unit, selling a broad range of household goods, Wellworth It has used the additional ancillary space at the rear of the store to increase the sales floorspace. Ledbury's ability to attract new operators into former national chain units is further emphasised by the occupation of the former Wine Rack unit on High Street by Hay Wines.

6.9 In terms of retailer representation, there has been a small but noticeable increase in the range of convenience goods retailers operating in the town. Although the Wyedean Wholefoods unit (100 sq.m. gross) has since become vacant, a number of small deli/grocers have opened in the town, including Hadley Organics (30 sq m gross) and Cameron & Swan's Deli (150 sq m gross), the latter of which replaced The Orangery gift store.

6.10 The MHE Index (2008) classifies Ledbury as a Minor District Centre with a rank of 1,175. This places Ledbury behind the other major Market Towns of Leominster (ranked 914) and Ross-on-Wye (ranked 731). A detailed comparison of MHE performance across the region is provided in the Health Check of Hereford provided in Section 4.

6.11 Whilst the lack of national multiple retailers causes Ledbury to perform poorly in comparison rankings such as MHE, this deficiency should not be considered only as a disadvantage. Much of Ledbury's character comes from its thriving independent retail provision, which is a counter-attraction for local residents and visitors as compared with the widespread provision of multiple shops found in larger centres.

Demand for Representation by Retailers and Other Commercial Operators

6.12 As there is no Focus Retail Report published for Ledbury, information on retail requirements in previous years is not available. At September 2007 there were 7 reported requirements for Ledbury, of which The Original Factory Shop had the largest requirement with a unit of between 565 sq m and 1,859 sq m gross.

6.13 According to Focus (July 2010), there are currently six retail requirements in Ledbury. Of these, two are charity shops and another is for Neat and Cheap Discount Stores. Interestingly, however, Austin Reed features in the list, which is unusual for a centre of this size and is therefore indicative of Ledbury's particular character and appeal.

6.14 It should be noted that the Focus database generally covers national retailers requirements, and given Ledbury's strength of independent traders, there is likely to be a stronger but unrecorded demand from independent retailers.

Shopping Rents and Yields

6.15 Information regarding shopping centre yields from the Valuation Office (July 2008) for the period from April 2002 to July 2008 is shown below.

Date	04/02	10/02	04/03	01/04	07/04	01/05	07/05	01/06	07/06	01/07	07/07	01/08	07/08
Ledbury	9	9	9	9	9	9	9	9	9	9	9	9	9

6.16 The rental yields within the centre have remained consistent at 9% since 2001. Whilst a 9% yield is higher than the yields identified for higher order centres, it is not surprising for a smaller centre such as Ledbury. The consistency of this level since 2001 suggests a stable centre.

Primary and Secondary Retail Frontages

6.17 The primary and secondary shopping frontage is identified on the UDP Proposals Map. Primary frontage is shown at The Homend and the market side of High Street. It is in this area that the majority of national retailers and larger units are found including Boots (440 sq m gross) and Spar (300 sq m gross).

6.18 The secondary frontage encompasses the remaining areas of The Homend up to the former Ledbury College Hospital, the opposite side of High Street as well as side streets such as Bye Street and New Street. New Street reflects its secondary frontage status, providing a mix of service and retail uses, with several Estate Agents located in close proximity but interspersed with independent retail provision.

6.19 Generally the limited size and linear nature of the centre restricts the forming of distinct concentration of uses in different areas of the centre. Public houses, cafes and restaurants are evenly spread across the centre. However, the corner of High Street and New Street is of note with Black Pepper Restaurant (100 sq m gross) and The Feathers Public House and Hotel (830 sq m gross) in close proximity to a number of other food and drink outlets.

Vacant Street-level Property

6.20 A clear indicator of the health of Ledbury during the 2007 initial study was the low vacancy rate. Based on the site visit by Drivers Jonas in October 2007 it was noted that there were five vacant units within the town centre. Of these, three were located along The Homend, one was on New Street and the smallest of the vacant units was located in a small mews off High Street.

6.21 This low number of vacant units in Ledbury representing 3.4% of units compared to the national average of 10.8% showed the strength of the centre in attracting and retaining business. However, this low level of vacant units suggested that limited opportunities exist for new retailers to establish themselves in the centre, which could potentially affect further development of the centre.

6.22 Since the initial survey, work has also been completed on a prominent vacant unit on The Homend. The former Abbeys Bakery on The Homend was identified previously with a floorspace of 1,710 sq m (gross). However, this unit has now been completely refurbished and converted into Tudor Mews, a small retail courtyard incorporating two new units, J.T Interiors and Just for Kids clothing. The reuse of this prominent building enhances the street scene and, with the exception of the small former Merlins Household Goods unit, there are no vacancies fronting Homend/High Street from this point south.

6.23 The 2009 field survey revealed that the number of vacant units in Ledbury had risen by two to seven. However by the time of the July 2010 survey this figure had risen further to 10 units, although two were actively under refurbishment. It should be noted that only one of these units is within the prime Homend/High Street pitch, with vacant units primarily concentrated on the fringes of the shopping area, such as at the junction of Market Street/New Street, or Church Street.

Pedestrian Flows

6.24 There is no data available from Pedestrian Market Research Services (PMRS) for Ledbury. Therefore our assessment of pedestrian flows is based on information obtained during site visits and provides indicators of the areas in which pedestrian footfall was highest.

6.25 The busiest area observed during the site visits was High Street in the area surrounding the historic Market Hall. As expected pedestrian numbers decreased with distance from this area, reflecting the linear nature of the shopping street. Pedestrian footfall was considerably lower on the streets intersecting with High Street / The Homend.

Accessibility

6.26 Ledbury is well served by public transport. There are regular rail services to Hereford and Birmingham, whilst a number of regional bus routes include the centre.

6.27 There are a number of car parks in Ledbury including four that are publicly owned and operated by Herefordshire County Council at Bridge Street, Bye Street, Lawnside Road and St Katherines. These car parks charge from 30p for one hour, although the Bridge Street car park is free of charge.

6.28 Cycle provision in Ledbury is good, with Herefordshire Council publishing specific guides to cycling within the town and its surroundings. There are several cycle racks provided at sites off the main shopping streets.

6.29 As mentioned previously, the prevalence of historic buildings does mean that those with limited mobility may find access to some units difficult. However it should be noted that Ledbury does contain a Shopmobility Centre and a local Community Voluntary Action group exists which has successfully campaigned for improvements in the pavements of Ledbury and the increase in automatic doors.

Perception of Safety and Occurrence of Crime

6.30 There are few signs of crime or graffiti within Ledbury. From Drivers Jonas Deloitte site visits, the centre did not appear intimidating.

6.31 According to the CCTV Annual Report 2009/10, cameras recorded 173 incidents during the monitoring period. Although cameras are visible throughout the centre, CCTV coverage had previously been noted as an issue. The Homend for instance was at the time of the initial survey, covered by only one camera and local police had called for a second camera as the under-provision was an identified weakness in the town.

Centre Environmental Quality

6.32 The town centre falls within a Conservation Area and consequently contains high numbers of historic buildings incorporating many different historic periods.

6.33 Although the historic streetscapes help create an aesthetically pleasing environment, traffic is a concern in parts of the centre, especially on High Street. Many of the retailers receive deliveries through their frontage and this can lead to traffic hold-ups caused by large lorries attempting to manoeuvre through the street.

6.34 In addition to the major retail thoroughfare of The Homend / High Street, there are numerous small mews and side streets that form attractive shopping areas which are largely free of traffic. The pedestrianised Church Lane is one such street offering a scenic vista to the nearby church. Elsewhere Homend Mews can be accessed through two small passages off The Homend and provides a courtyard setting for several retailers, enhanced by benches and planting.

Development Plan Allocations, Proposals & Commitments

6.35 The adopted UDP contains no development site allocations within Ledbury town centre and there are no extant planning permissions for significant levels of new floorspace (over circa 500 sq m).

Soft Areas and Potential Development Sites

6.36 Ledbury town centre has a linear form along the main street of High Street and the Homend. In addition there are small yards and lanes off the main street, where existing buildings have been converted to accommodate further retail units.

6.37 From our appraisal of the centre, an area of possible development potential lies along Bye Street, where the most retail development has taken place. The former car park on Bye Street / Market Street has already been redeveloped for mixed uses. There is further car parking off Bye Street and this may offer scope for further development, although our initial view is that this is likely to be limited.

Town Centre Health Check Summary

6.38 Despite the changes to the national retail market and the loss of Woolworths (one of the few national multiple retailers in the town), the town has adapted to such changes well and the July 2010 survey suggests that Ledbury remains a vibrant and strong centre.

6.39 Ledbury benefits from its historic environment, with many of the narrow pedestrianised streets providing accommodation for small independent boutiques and art galleries which cater for both residents and the tourists who visit the centre.

6.40 However, the historic layout of the town, although creating an attractive shopping environment, also places constraints on the centre. Streets are narrow and congestion is made worse, as most units do not have loading bays, which means that delivery lorries must navigate and park outside store entrances. Also the Conservation Area status of the town centre makes development opportunities for stores which meet modern requirements hard to find.

Out-of-centre Retail and Leisure Uses

Tesco – Orchard Lane

6.41 A Tesco store opened in 1997 is located approximately 250m walk from the CSCA boundary. The store has a gross sales area of approximately 2,137 sq m with a sales area of around 1,365 sq m. There are approximately 170 car parking spaces provided and 14 checkouts available.

6.42 Although the store does contain a café and photo processing facilities, it does not offer the wide range of goods offered by larger Tesco stores. The provision of goods is predominantly limited to convenience goods and the store does not contain significant ranges of clothing or household and bulky goods.

Homebase – Leadon Way

6.43 A Homebase store is located south west of the town centre. The store is circa 2,540 sq m (gross) with circa 50% cover mezzanine and has 102 parking spaces.

Countrywide Farmers Country Store – Hazel Park

6.44 This store is located south west of the town centre. This is a substantial sized store which sells a wide variety of goods serving the rural community. This includes a wide range of clothing and household goods. In addition to agricultural supplies, the store also contains a garden centre and Autogas key site.

7 Leominster

Town Overview

7.1 Leominster is classified as a Market Town within the adopted UDP. The primary retail area is centred around the High Street and West Street.

7.2 Leominster contains several national multiple retailers located within the town centre and the Co-operative (formerly Somerfield) is the only national food store operator in the town centre. Following the closure of Kwik Save, an Aldi store has opened adjacent to the defined town centre boundary. There are a large number of smaller independent traders present within the centre.

7.3 Shops within Leominster town centre are accommodated in ground floor units, thus providing an accessible retail facility. In addition, the centre can be easily accessed by a number of modes of transport, including cycling, train and bus.

Town Centre Health Indicators

The Quantity and Quality of Retailing and Other Commercial Uses

7.4 Leominster accommodates a range of retail facilities which are discussed below. In addition to retailing the centre also hosts a wide range of non-retail facilities and activities. These includes several leisure units within the town centre including the Re-Rack Snooker Club, Top Ten Bingo and numerous social clubs.

7.5 The overall mix of uses within Leominster town centre at 2007 is summarised in the table below, based on data from GOAD and a Drivers Jonas site visit in October 2007

Sector	No. of Units	% of Units	National Average %
Convenience	15	7.5	9.2
Comparison	103	51.2	45.5
Service	61	30.3	33.2
Other	4	2	1.3
Vacant	18	9	10.8
Total	201	100	100

Source/notes:
(1) The categories are based on the classification provided by GOAD, relate to ground floor uses only. Data on UK averages has been provided by GOAD (October 2007).
(2) Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services, building societies, estate agents and valuers. Taxi offices are also included in the service category, although this use is not categorised by GOAD.
(3) Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis, therefore for the purpose of comparison, these have been excluded from our analysis.
(4) 'Other' category includes employment agencies, tourism offices and main and sub-post offices.

7.6 This table demonstrates that the dominant uses within Leominster were comparison shops and services. Service uses comprised 30.3% of the total units within the centre, which was slightly lower than the national average of 33.2%. comparison goods retailers in the town centre represented 51.2% of units, which was above the national average indicating that comparison goods trading was (and remains) the dominant use within the centre.

Representation by retailers and other commercial operators

7.7 In 2007, Leominster had several national multiple retailers present including Boots, Woolworths and Lloyds Pharmacy, representing 15% of top 20 retailers. Since 2007 however, there have been some interesting changes in retailer representation within the centre.

7.8 As with the other major market towns in Herefordshire, the 390 sq.m. (gross) former Woolworths store has been let (although this occurred much more quickly than in the other towns), with national multiple retailer WH Smith now occupying this unit. Indeed, where larger floorspace units have become available, such as the former Peter Briggs Shoes unit, these appear to have been let relatively quickly, albeit in this instance, to a charity shop (YMCA).

7.9 In terms of convenience goods, a Co-op store (1,388 sq m gross, 756 sq m sales area) is located within the town centre off Dishley Street. From Drivers Jonas Deloitte site visits, we note that this store is popular with a good range of convenience goods, some comparison goods available and circa eight checkouts. In addition, an Aldi store (1,570 sq m gross) is located off Dishley Street, adjacent to the defined town centre boundary.

7.10 Leominster contains a significant number of independent retailers selling a range of goods including discount goods, antiques, gifts, as well as independent delicatessens and butchers. These independent retailers provide a good mix of products and services within the town centre.

7.11 The MHE Shopping Index (2008) classifies Leominster as a Minor District centre and ranks it 914. This places Leominster ahead of Ledbury (ranked 1,175) but behind Ross-on-Wye (ranked 731) and Hereford (ranked 66). A detailed comparison of MHE performance across the region is provided in the Health Check of Hereford provided in Section 4

Demand for Representation by Retailers and Other Commercial Operators

7.12 Based on information obtained from the Focus database in September 2007, there were 13 reported retail requirements for Leominster. These requirements included major national operators such as Superdrug, Edinburgh Woollen Mill and supermarket chain Farmfoods, whilst the largest requirement came from Pets at Home with a store size requirement for up to 1,114 sq m. In 2007 (Focus August 2007) the level of retail demand in Leominster was the highest level since at least 1992.

7.13 According to Focus, at July 2010 there were six retailers with requirements in Leominster, down slightly from April 2009 (eight requirements) and noticeably down from the 13 requirements that were live during the initial health check surveys. Although the requirements include two charity shop operators, there are some notable national multiple retailers with requirements in Leominster. These include The Works and Edinburgh Woollen Mill, and in addition the Co-operative has recently reported (6 July 2010) a small 50-100 sq m convenience goods requirement within the town.

Shopping Rents and Yields

7.14 Information regarding shopping centre yields has been obtained from a Valuation Office report (July 2008). The table below sets out the reported yields for the centre in the period from April 2002 to July 2008.

Date	04/02	10/02	04/03	01/04	07/04	01/05	07/05	01/06	07/06	01/07	07/07	01/08	07/08
Leominster	>=10	>=10	>=10	>=10	>=10	>=10	>=10	>=10	>=10	>=10	>=10	>=10	>=10

7.15 The rental yields within the centre are relatively high indicating some investor caution in Leominster as compared with Ross-on-Wye and Ledbury.

Primary and Secondary Retail Frontages

7.16 The primary and secondary shopping frontages are identified on the UDP Proposals Map. The primary shopping frontage is quite extensive stretching the length of West Street from the CSCA boundary and encompassing the entirety of High Street. In addition, the pedestrianised Drapers Lane is considered primary frontage, as are Corn Street, Victoria Street and the Buttercross Arcade.

7.17 The primary frontage is well linked to parking provision within the centre. The Buttercross Arcade connects the primary frontages of Church Street, and High Street to the central car park accessed off West Street. Similarly the large Euro Car Park is connected by Black Swan Walk to the primary shopping of West Street.

7.18 The secondary frontage includes Broad Street to the junction with New Street, School Lane and parts of Church Street. There is a wider mix of uses in the secondary frontage compared to the primary frontages. Broad Street, despite its immediate proximity to High Street, contains a more diverse selection of uses with Property Agents, independent antique stores and delicatessens all contributing to the mix.

Vacant Street-level Property

7.19 At September 2007, Leominster had a vacancy rate below the national average with 18 vacant units representing 9% of total units.

7.20 By the time of the first supplementary survey in March 2009, the number of vacant units in the centre had risen from 18 in 2007 to 21. By June 2010 however, the level of vacancy in the town had dropped to only 12 units, the majority of which are small units such as the former J&F Chinese Herbalists on High Street (30 sq.m. gross), or are located in fringe locations on side streets.

Pedestrian Flows

7.21 Pedestrian Market Research Services (PMRS) data is not available for Leominster. Based on observations during site visits it was found that the area with the highest pedestrian footfall was the junction between High Street and Corn Street.

7.22 It should be noted that during the site visits there was a Farmers Market operating in Corn Square which is likely to have increased footfall in this area. However given the prominence of retail on this area of the High Street and that Corn Street is a key connection between High Street and the pedestrianised School Lane, it is likely the Farmers Market boosted already high footfall figures.

7.23 Pedestrian footfall at the time of the study was particularly low towards the fringes of the shopping areas, including the northern end of Broad Street and western end of West Street. The pedestrianised shopping precincts of Drapers Lane and School Lane experienced moderate levels of footfall. However, the majority of shoppers tended to remain on the trafficked roads where the majority of retail provision is located.

Accessibility

7.24 Leominster has good road connections via the A49, A4112 and A44 running through the town. The centre is also served by frequent train services which connect the town to South Wales as well as other regional centres. There are also a number of bus services which connect the town to neighbouring centres and smaller settlements as well as national coach services.

7.25 There are several car parks in Leominster town centre with 575 spaces provided in Council run car parks as well as some on street parking in the CSCA. The largest of the car parks, Broad Street and Etnam Street, provide free parking. The charges for the other car parks start at 30p for one hour.

Perception of Safety and Occurrence of Crime

7.26 Leominster showed few signs of crime or graffiti and the centre is generally not considered to be intimidating or to have a high perception of crime.

7.27 There is adequate CCTV provision in the town centre and in parts this coverage is very noticeable. This is especially clear in Corn Square where a CCTV lamppost is prominent within the streetscape. According to figures obtained from Herefordshire Council, there were however 533 recorded incidents in the period 2009/2010.

Centre Environmental Quality

7.28 As with the other market towns in Herefordshire, Leominster town centre benefits from being a Conservation Area. Much of the town centre is of good environmental quality and contains a range of historic buildings and a relatively limited number of buildings of poor architectural quality.

7.29 Of particular note is Broad Street, where wide pavements, good parking provision and traffic restrictions create a pleasant public realm, encouraging the public to linger. The street is enhanced by street furniture and planting which add to the physical environment.

7.30 The street pattern in Leominster is the result of the town’s history and the layout of the streets continue to reflect its historic character. This results in some of the streets such as High Street, appearing cramped and enclosed. However, there are several traffic free areas: Drapers Lane and School Lane are pedestrianised and offer a wide variety of retailing and service uses in a historic environment.

7.31 The quality of environmental is less good in some of the fringe locations within the town centre. A proliferation of surface car parking and limited crossing opportunities are a particular problem around the bus interchange on Westbury Street. Similarly, traffic is a major concern at the junction of Bargates and Cursneh Road and creates not only an unpleasant street scene but also creates a physical barrier for the Spar store and takeaway.

Development Plan Allocations, Proposals & Commitments

7.32 The adopted UDP contains no development site allocations within the CSCA and there are no extant planning permissions for significant levels of new floorspace (over circa 500 sq m).

Soft Areas and Potential Development Sites

7.33 From our analysis of Leominster, we note that the town centre has some scope for further development. The Burgess Street car park in the centre of the town is within a central location surrounded by other retail units. There are a number of access points into this car park from the surrounding streets and there may be scope to re-provide this car parking elsewhere on the fringes of Leominster, to enable development of this site.

7.34 Our appraisal has also highlighted the presence of other sites off Dishley Street, adjacent to the town centre boundary that may be suitable for more intensive forms of development. These sites currently accommodate uses such as car maintenance and repairs, nurseries, etc.

Town Centre Health Check Summary

7.35 Despite the economic downturn and loss of Woolworths, Leominster has retained (and continues to attract) a good variety of retail provision within the town centre. Unlike some of the other market towns within Herefordshire, there is a good mix of national multiple retailers and specialist independent stores which creates a vibrant town centre offer.

7.36 Whilst the surface car parking and narrow trafficked streets does impact on the quality of the shopping environment in parts of the centre; in general, away from the fringes, the core area offers a pleasant town centre streetscape and attractive environment.

Local Centres

Barons Cross Road, Leominster

7.37 Although not identified as such on the UDP Proposals Map, Baron's Cross Road is included as a local centre in County's retail hierarchy set out in paragraph 7.3.2 of the UDP. It was included as a local centre as a result of representations made by Safeway and the ensuing UDP Inspector's recommendations. He found that it fulfilled at least three of the functions typically associated with local centres identified in PPS6.

7.38 The centre is located approximately one km to the west of the town centre and consists of a large Morrisons foodstore. The store opened as a Safeway store in 1992 before being converted into a Morrisons store in 2004. The food store has a gross area of approximately 3,340 sq m. and a sales area of approximately 2,460 sq m. There are 518 spaces and 24 checkouts available. In addition to the on-site petrol station, the store offers a range of services including a dry cleaners, café and photo processing laboratory.

7.39 An application to extend the Morrisons store was received by Herefordshire Council in May 2008. The proposal was for an additional 365 sq m net additional sales area, of which 171 sq m was for convenience goods and 194 sq m for comparison goods. Planning permission was granted in August 2008 and the extension is currently under construction.

Out-of-centre Retail, Business and Leisure Uses

Leominster Enterprise Park

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

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

Focus Do It All

7.42 This store is circa 2,764 sq m (net) and is located circa 650m beyond the CSCA on Mill Street. The store also contains a garden centre and is served by 135 car parking spaces.

Countrywide Farmers Store

7.43 This store is located in the Railway Industrial Estate to the east of the town centre and next to Leominster train station. As with other Countrywide stores in the region the unit sells a range of agricultural supplies, as well as household goods and clothing. This branch does not however include a garden centre.

8 Bromyard

Town Overview

8.1 Bromyard is classified as a Market Town within the adopted UDP town centres hierarchy. The UDP does not identify a primary shopping frontage for Bromyard stating that that Bromyard's shopping centre is unique in character, differing from the other market towns. Secondary shopping frontages are identified running the length of High Street and Broad Street from the Leisure Centre site to the Market Place.

8.2 Retailing in Bromyard is predominantly located along High Street/Broad Street, where shopping floorspace is at ground floor level. However the age of many buildings means that some units are not easily accessible to wheelchair users. In addition, the centre is accessible by private car and buses, but does not have a train station.

8.3 In the absence of much published data on the centre, our analysis of the health of the centre was derived from an initial site visit undertaken in September 2007, as well as through discussions with local agents and retail operators. The figures provided are estimates based on visible sales floorspace. Supplementary health checks were undertaken in March 2009 and July 2010 and are referenced accordingly.

Town Centre Health Indicators

The Quantity and Quality of Retailing and Other Commercial Uses

8.4 The overall mix of uses within Bromyard town centre at 2007 is summarised in the table below, based on data from GOAD and a Drivers Jonas site visit in September 2007

Sector	No. of Units	% of Units	National Average %
Convenience	9	11.7	9.2
Comparison	31	40.3	45.5
Service	27	35	33.2
Other	0	0	1.3
Vacant	10	13	10.8
Total	77	100	100

Source/notes:
(1) The categories are based on the classification provided by GOAD, relate to ground floor uses only. Data on UK averages has been provided by GOAD (October 2007).
(2) Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services, building societies, estate agents and valuers. Taxi offices are also included in the service category, although this use is not categorised by GOAD.
(3) Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis, therefore for the purpose of comparison, these have been excluded from our analysis.
(4) 'Other' category includes employment agencies, tourism offices and main and sub-post offices.

8.5 Representation of convenience retailing in Bromyard is above the national average. This indicates that the town centre is often used as a facility for people to undertake day-to-day shopping. Consequently local residents utilise the larger centres of Hereford or Worcester for their comparison goods shopping. This explains why the comparison retail provision within the town is lower than the national average.

8.6 The CSCA boundary extends to the Leisure Centre to the north. Beyond this lies the Conquest Theatre, a Co-op food store (1,208 sq m gross), a local farmshop (local convenience goods) and a Countrywide store (outdoor goods and clothing) (circa 532 sq m net). These facilities contribute significantly to the retail offer of the town centre, but are not linked to the main town centre in a particularly legible manner.

8.7 Within the town centre, there were no facilities in the 'Other' category. This reflects the absence of ground floor tourism offices and employment agencies within Bromyard which given its small size, is not surprising. It should be noted however that there remains a Post Office east of the town centre boundary, the inclusion of which would bring Bromyard in line with the national average.

8.8 The town centre is dominated by a mixture of small independent shops, service outlets and non-retail uses. These facilities are dispersed within the secondary shopping frontages.

8.9 In terms of other town centre uses (excluded from the above table), a museum is located at the corner of Broad Street and Church Street. The Time Machine Museum contains large displays of science fiction memorabilia as well as a coffee shop. The Conquest Theatre, whilst located outside the CSCA boundary, performs an important function for the community displaying local productions and film viewings. Such attractions emphasise the importance of tourism and services for the centre.

8.10 The majority of buildings have town centre uses on their ground floors with residential floorspace above. There is some office space above certain units, such as the offices for Hanley Builders, but broadly speaking office uses appear to accommodate financial and property services.

Representation by retailers and other commercial operators

8.11 Bromyard does not feature in the Venuescore rankings.

8.12 The MHE Shopping Index (2008) classifies Bromyard as a Minor Local Centre and ranks it 3,321. This places it ahead of Kington (ranked 4,666) but significantly the other market towns such as Ross-on-Wye (ranked 731) and Ledbury (ranked 1,175). A detailed comparison of MHE performance across the region is provided in the Health Check of Hereford provided in Section 4.

8.13 There are very few national retailers present in the town and its retail provision is characterised by small independent units. In addition to the Co-Op's approximately 278 sq m net High Street store, the Co-op group also operate a large superstore to the rear of the Leisure Centre. This large Co-op store is approximately 1,208 sq m (gross) with a sales area of approximately 1,025 sq m.

8.14 Aside from a 85 sq m Stars Newsagents, the majority of the remaining convenience units are independent specialist retailers such as Neil Gladwin Butchers (60 sq m in two units) and Gilberts Fruit & Veg (120 sq m). These independent traders appear to be trading successfully from the town centre.

8.15 The comparison offer in the town was, and remains, relatively limited. There are no major national multiple retailers present and fashion provision is limited to small boutique stores such as Sez ladieswear. Financial and property services are distributed throughout the commercial area, as are a range of antique shops, art galleries and niche tourism retailers such as the Old Print Shop. The outlets make up a diverse range of facilities though perhaps a limited depth of goods.

8.16 A number of new businesses have opened since the original Drivers Jonas survey, including Foxy's Steak Bar at the western end of High Street. Whilst there have also been a number of losses of independent retailers, particularly in the period 2008-2009, such as The Candle Shineth (35 sq m net) and Bromyard Tartan (40 sq m net), the July 2010 position suggests a fair level of demand by independent retailers to take up available premises (see below).

8.17 There is a discernable sense of pride evident through the independent retail provision in Bromyard. Many of the units surveyed contained a placard which stated "*This is an Independent Shop…Support Your Local Shops*".

Vacant Street-level Property

8.18 At the time of the September 2007 site visit, Bromyard had an above average level of vacancies when compared with the national average with ten units vacant in the centre, representing 13% of units (although work was being undertaken on a number of these units).

8.19 An additional field survey undertaken by Drivers Jonas in March 2009 noted that there had been fairly significant changes in Bromyard. This survey revealed that the number of vacant units had actually increased to 14 units, of which one was currently being refitted and a further unit was marked as let. At this time, vacant units were distributed along the length of High Street / Broad Street, but were most pronounced toward the eastern end of Broad Street, which included a row of three vacant units. The 2009 updated health check concluded that the increase in the number and prominence of vacant units in Bromyard had an negative impact on the environmental quality of the centre, and appeared to have impacted on pedestrian flows through the town centre, particularly towards the Market Square end of Broad Street.

8.20 By July 2010 there had been a noticeable upturn in the health of the centre. The level of vacancy in the town had halved to seven units. The size of vacant units are generally small. However a noticeable exception to this remains the former First Stop Direct discount store (circa 250 sq m net). Although the decline in vacant units appears to have stabilised, there remains a degree of polarisation in health along the length of the main streets. Whilst the northern end and southern end (Market Square) are well occupied and include a variety of retailers, there is a more noticeable decline in the areas between them. The area, roughly between Frog Lane and Pump Street contains the most prominent vacancies, including the former Peter Briggs shoes unit and the former First Stop unit.

Discussions with local agents

8.21 Discussions with local agents in Bromyard in 2007 confirmed that a number of the vacant units were in the process of being refitted and that many had been let. Agents suggested that there was a good level of demand in Bromyard and that most properties are not on the market for long.

8.22 Much of the demand comes from start-up independent retailers rather than any significant interest from larger national retailers. Agents suggested that some of the units, although small compared to some of the other Herefordshire centres, are often too big for the independent retailers with rents too high for start-up companies.

8.23 One agent suggested that there is a significant level of demand from retailers wishing to open fast food takeaways in the town centre, and was concerned about over-replication of facilities in the centre.

8.24 The office market in Bromyard, consists primarily of small units above service units such as estate agents, and was described as healthy with units of around 70 sq m to 100 sq m being about the average size. Agents have suggested that one of the major issues in letting available space is the poor parking provision within the centre.

8.25 A noted major positive for potential occupiers however, is Bromyard's location on the road network. The town is strategically sited midway between Worcester (and access to the motorway network) to the east and Leominster to the west. In addition there is a good road link to Hereford which lies to the south west of the town. The agents did however also raise concerns about traffic outside the town, particularly near to Worcester which can substantially increase journey times.

Pedestrian Flows

8.26 PRMS data is not available for Bromyard.

8.27 Because of the linear nature of the main shopping area, the largest pedestrian flows were noted on High Street and Broad Street. The busiest area was High Street around the Co-op store. Pedestrian footfall levels were significantly lower on streets beyond High Street / Broad Street.

Accessibility

8.28 The A44 which runs through Bromyard connects the town to Worcester to the east and Leominster to the west.

8.29 Although there is no railway station within the town, there is fairly good bus and coach provision. There are frequent services connecting the town to the nearby centres including Hereford. This journey takes just over one hour and is operated by several different companies Monday to Saturday meaning that a good frequency is maintained.

8.30 Council operated car parks provide 107 spaces within Bromyard, with no charge at Rowbery Street and a charge of 40p for one hour at the larger Tenbury Road site. Although much of the parking provision is located off the main commercial streets, there is a small parking provision in the Market Square outside the Hop Pole Hotel. As mentioned, local agents have raised concern that parking provision is inadequate and is affecting their ability to let space.

Perception of Safety and Occurrence of Crime

8.31 Crime statistics from West Mercia Police show that levels of crime in Bromyard are much lower than the UK average. There are few signs of crime or graffiti and the centre is generally not considered to be intimidating or to have a high perception of crime.

8.32 There is a strong emphasis on community policing with neighbourhood watch schemes as well as community websites where crime is reported and the police provide summaries of the issues that affect local residents.

Centre Environmental Quality

8.33 When assessing the environmental quality of small centres such as Bromyard it is important to bear in mind that the absence of pedestrianised streets is not necessarily a negative point. Traffic flows in the centre are relatively low with traffic using the A44 by-pass of the town centre. Although flows will undoubtedly be higher during peak hours, there are benefits from direct access to, and activity within, the core shopping area.

8.34 Conservation Area status which encompasses the town centre protects the existing built environment from harm caused by unsympathetic or poor quality architecture. The result is a pleasing environmental quality which complements Bromyard's retail character. We noted however that some of the retail frontages, particularly in the Broad Street area showed signs of disrepair.

8.35 It is noticeable that efforts have been undertaken to address some aesthetic issues. Since 2007 several small vacant units have been temporarily converted into displays by the Bromyard Heritage Trust, who in their window displays, state that they are attempting to "reinvigorate the town". These displays form part of a Bromyard Heritage Trail and utilise the shop windows/display areas to recreate heritage scenes such as a Victorian Parlour.

Development Plan Allocations, Proposals & Commitments

8.36 The adopted UDP contains no development site allocations within CSCA of Bromyard and there are no extant planning permissions for significant levels of new floorspace (over circa 500 sq m).

Soft Areas and Potential Development Sites

8.37 Our appraisal of Bromyard has highlighted the presence of potentially developable land to the south of the town centre boundary. There is an existing garage site located on the A44 Bromyard By-pass and accessed from the town centre along Frog Lane. This site could provide a potential expansion area for the town centre, also serving to enhance the vitality and viability of the Broad Street area of the town centre.

Town Centre Health Check Summary

8.38 Following the 2007 survey Bromyard town centre showed clear signs of the effects of the recent economic downturn. However, it has since recovered well and continues to offers residents and visitors a diverse range of town centre uses relative to its size in a pleasant shopping environment within a Conservation Area.

8.39 There are few multiple retailers, and independents predominate including niche traders and specialist facilities. Convenience shopping needs are well provided for within the wider town centre. Otherwise the depth of goods on offer in the centre is somewhat limited. Most higher order comparison goods shopping trips are attracted to the larger centres of Hereford and Worcester.

9 Kington

Town Overview

9.1 Kington is classified as a Market Town within the adopted UDP retail hierarchy. The town is located approximately 32km north west of Hereford and 23km west of Leominster.

9.2 Shops within Kington are at ground floor level, thus providing a generally accessible retail facility. In addition, the centre can be easily accessed by a number of modes of transport, including cycling and bus, whilst the Offa's Dyke pathway runs through the town making it a tourist stop *enroute*.

9.3 The primary shopping frontage identified on the UDP Proposals Map runs from Church Street (opposite the Market Hall) to the junction with Bridge Street (including the northern section of Bridge Street).

Town Centre Health Indicators

The Quantity and Quality of Retailing and Other Commercial Uses

9.4 The town contains a broad range of retailers, and commercial uses are predominately limited to ground floor units with residential space above.

9.5 The overall mix of uses within Kington town centre at 2007 is summarised in the table below, based on data from GOAD and a Drivers Jonas site visit in October 2007

Sector	No. of Units	% of Units	National Average %
Convenience	11	17.5	9.2
Comparison	25	39.7	45.5
Service	21	33.3	33.2
Other	1	1.6	1.3
Vacant	5	7.9	10.8
Total	63	100	100

Source/notes:
(1) The categories are based on the classification provided by GOAD, relate to ground floor uses only. Data on UK averages has been provided by GOAD (October 2007).
(2) Service uses include restaurants, coffee bars, fast food and take-away, hairdressers, beauty parlours and health centres, laundries and dry cleaners, travel agents, banks and financial services, building societies, estate agents and valuers. Taxi offices are also included in the service category, although this use is not categorised by GOAD.
(3) Pubs, night-clubs and other leisure uses are excluded by GOAD from the national analysis, therefore for the purpose of comparison, these have been excluded from our analysis.
(4) 'Other' category includes employment agencies, tourism offices and main and sub-post offices.

9.6 The table above illustrates that convenience provision was, at 2007, above the national average with 17.5% of town centre units. This provision remains led by a relatively large Co-op store on Crabtree Road (700 sq m net), a mid-sized Spar outlet on Church Street (300 sq m net) and Nisa on High Street (320 sq m net). Other than these national retailers, there is a good range of independent convenience retailers including specialist food stores such as George's Deli (60 sq m net) and Chocolate Box (45 sq m net).

9.7 At circa 40% of units in 2007, Kington offered a below average provision of comparison retail. Much of the comparison offer consisted of second hand stores/antique stores with seven units offering a range of bric-a-brac and specialist antiques. Specialist provision in the town is complemented by several gift stores including Bopsom & Son on High Street.

9.8 Other than specialist stores, the main-stream comparison retail range in Kington remains very limited with few fashion retailers. Cliff Hedges Menswear (60 sq m net) is indicative of the unit size of fashion retail space in the town, although the Club Sport store (200 sq m net) provides a fair range of sports clothing. The remainder of the comparison retail tends to focus on specialist goods such as tools or electrical.

9.9 Although retail frontages in the centre are relatively strong, service units are widely distributed and often occupy prominent locations. This is most obvious at the strategic junction of High Street and Bridge Street where McCartney's Estate Agent occupies the prominent corner plot, whilst HSBC and Russell Baldwin Estate Agents have units opposite.

9.10 Because of the predominance of independent retailers, some shops have irregular opening hours.

Demand for Representation by Retailers and Other Commercial Operators

9.11 The MHE Shopping Index (2008) classifies Kington as a Minor Local centre and ranks it 4,666, the lowest of all the Herefordshire towns. This places it behind Bromyard (ranked 3,321) and significantly behind the other market towns such as Ross-on-Wye (ranked 731) and Ledbury (ranked 1,175). A detailed comparison of MHE performance across the region is provided in the Health Check of Hereford provided in Section 4.

9.12 Information on demand for retailer representation is not readily available. However, discussion with local agents indicated that demand for units is (and is likely to remain) from independent companies and start-up businesses with little interest from national retailers. Also securing an occupier can be more difficult and take longer than in other centres.

9.13 Agents suggested the small size of a centre need not be an insuperable problem, referring to the nearby Hay-on-Wye, which has developed a very specialist upmarket niche role increasingly attracting the interest of national retailers.

Vacant Street-level Property

9.14 During the 2007 site visit five vacant units were identified of which most were towards the fringes of the retail area on Church Street. This vacancy rate of 7.2% of total units was well below the national average. The vacant units often had an irregular footprint and appeared to contain several small rooms rather than an open floorplate, which is likely to reduce their attractiveness to the market and limit the potential occupiers.

9.15 The two supplementary town centre health checks (March 2009 & July 2010) revealed that the level of vacancy within Kington has remained relatively static since the 2007 health check. The number of vacant units had risen slightly by March 2009 from five to seven units, but then decreased to six by July 2010. However, one of these units had become vacant one week before the survey, with the Olive Café ceasing trading after 18 months in operation.

9.16 Vacancies within the town centre are broadly distributed. However, there is one noticeable concentration of vacant units, at the junction of High Street / Bridge Street, where there are three vacant units including the former Inner Secrets Gifts store (circa 70 sq.m.).

9.17 Information on shopping rents/yields is not readily available for Kington.

Accessibility

9.18 Kington is located approximately 32km north west of Hereford and 23km west of Leominster. The town is served by a number of bus routes linking it to surrounding destinations including Hereford and Llandrindod Wells. There are a number of bus stops located on the High Street and Bridge Street.

9.19 There are four Council operated car parks in Kington, offering 140 spaces of which all but the 41 spaces at Mill Street are free of charge. Parking at Mill Street is charged at 30p for one hour.

Perception of Safety and Occurrence of Crime

9.20 Crime statistics from West Mercia Police show that levels of crime in Kington are much lower than the UK average. However, we have been made aware of concerns expressed by residents about a fear of crime and anti-social behaviour in the town. A ban on street drinking came into effect on 28 September 2007 and covers most areas within the town centre.

Centre Environmental Quality

9.21 Kington's compact and linear town centre is of good environmental quality. The restrictions on street parking along High Street allow traffic to move freely through the centre without disruption, although the absence of dedicated crossings may create accessibility issues for some. Similarly the narrow pavements could negatively affect pedestrian movement during peak times.

9.22 Because of the narrow width of the High Street, the absence of co-ordinated street planting and furnishing is not surprising. However, small touches such as decoration of the street with colourful banners help to create a pleasant environment for visitors. Outside the shopping areas however there is a noticeable decline in the quality with many buildings looking in need of refurbishment.

Development Plan Allocations, Proposals & Commitments

9.23 The adopted Hereford UDP contains no development site allocations within Kington CSCA and there are no extant planning permissions for significant levels of new floorspace (over circa 500 sq m).

9.24 Planning permission was granted on appeal for a further 'general store/shop' of some 334 sq m gross at 20 Bridge Street, south of the CSCA boundary. However, we understand that this consent has lapsed.

Soft areas and potential development sites

9.25 The majority of retail provision in Kington town centre is located on the main High Street and along Bridge Street. To the south of properties along High Street is an existing car park accommodating circa 80 spaces. This lies adjacent to the Co-op store and could provide a potential area for further development, within the town centre boundary.

Town Centre Health Check Summary

9.26 The supplementary health checks have found that the health of the centre has remained relatively static since the initial 2007 survey, with the centre remaining healthy

9.27 Kington town centre is similar in size to Bromyard and offers residents and visitors a diverse range of town centre uses. The town centre provides a pleasant shopping environment, although traffic is a little obtrusive in High Street. The whole of the town centre is Conservation Area.

9.28 There are few multiple retailers and independents predominate. Convenience shopping needs are well provided for within the town centre. Otherwise the depth of goods on offer in the centre is somewhat limited. Most higher order comparison goods shopping trips are attracted to Hereford.

10 Comparative Centres

10.1 Our analysis of comparative centres is largely based on the Roger Tym & Partners' Regional Centres Study (2005 and subsequent updates). Where appropriate the figures provided have been updated to reflect changes in the centres since the Study was published. We have also provided summary updates for each centre identifying any significant changes in the centres since the initial Study was completed.

Worcester

10.2 Worcester is located approximately 40km north-east of Hereford and is a major centre in the region. The City is very well connected and easily accessible by all public and private transport with good rail, bus and road links to the rest of the country. The City Centre benefits from high visual amenity, with the majority of the centre falling within a Conservation Area.

10.3 Worcester's principal competitors are Cheltenham and Birmingham City Centre, the being around 40 minutes drive to the north-east. Birmingham has an extensive retail offer, which was bolstered with the opening of the redeveloped Bullring shopping centre in 2003.

10.4 The MHE Shopping Index (2008) (table below) compares the position of Worcester against the other nearby regional centres.

Centre	MHE Ranking	MHE Classification
Birmingham	3	Major City
Cheltenham	22	Major Regional
Bristol	29	Major Regional
Worcester	62	Regional Centre
Hereford	66	Regional Centre
Gloucester	70	Regional Centre

Source/ Notes:
1) Management Horizons Europe (MHE) Shopping Index (2008).
2) This classifications reflect nine grades of retail centres in the United Kingdom: Major City, Major Regional, Regional, Sub-regional, Major District, District, Minor District, Local and Minor Local.

10.5 Worcester's rank of 62 is ahead of Hereford (66) and Gloucester (70), but behind Cheltenham (22). Worcester's ranking indicates the volume and quality of retail provision in the City, reflecting its size, affluence and catchment area.

10.6 According to a February 2009 survey by Retail PROMIS, the vacancy rate in Worcester City Centre was 13.2% of units, marginally above the PROMIS average (of 200 centres selected on the basis of size and prime rents) and a slight increase from July 2007. However the PROMIS report also states that at July 2010, there were 23 City Centre reported requirements for Worcester against an average of 18 across PROMIS centres.

10.7 According to the Focus Town Centre Report (October 2007), 80% of top 20 retailers are present in the town centre. Worcester City Centre contains 59,200 sq m of comparison floorspace, which is the ninth-highest in the Region.

10.8 Analysis of key vitality and viability indicators shows that Worcester is a steady performer as a retail centre. The PROMIS report estimated that prime rents in Worcester in mid 2007 were above those in Hereford (£135 psf) at £160 psf Zone A. The Regional Centres Study showed that Worcester's prime retail yield of 4.75 per cent (July 2004) has been consistent since 1999 and is the lowest in the West Midlands Region. The Promis report of July 2007 stated that agent sources placed prime retail yields at 4.5%, slightly superior to Hereford at 4.75%. Such a yield indicates that Worcester is considered to have strong potential for future growth and is perceived favourably by investors. At end 2009, agent sources estimated prime rents in Worcester at £145 psf Zone A, a small decline since the £160 psf rates estimated in mid 2007.

10.9 There is no additional floorspace currently under construction within Worcester City Centre. The PROMIS report however does state that agents have confirmed that there are further plans to reconfigure units in Cathedral Plaza following the departure of Sainsburys.

10.10 Outside the City Centre, the Lowesmoor Trading Estate development proposed on land adjacent to Shrub Hill Retail Park, has yet to come forward, although it is now known as St Martins. This development was originally planned as a mixed retail and leisure development with an element of residential, as well as a health club and hotel. The application has since been revised for a smaller development including an Asda superstore and circa 9,300 sq m non-food retail, but excluding the hotel and health club. Full planning permission was granted after land issues regarding access were resolved.

10.11 Aside from its retail provision, the City Centre of Worcester is a desirable office location, but is restricted by a relatively small supply of sites and office space. According to the Regional Centres Study, the City Centre has a built stock of 80,000 sq m (861,000 sq ft) but current availability at the time of the study stood at 4,700 sq m (50,600 sq ft) only, equating to a vacancy rate of 5.9 per cent.

10.12 Worcester has a good level of leisure provision and the Centres Study indicated that the City had a broader range of leisure uses, including two multi-screen cinemas, than many of the nearby regional centres.

Gloucester

10.13 Gloucester is a historic cathedral city and popular tourist destination approximately 48km from Worcester and 51km from Hereford. The City is very well connected and easily accessible to the UK motorway network with the M5 running close to the City. Public transportation links are also very good with frequent rail and bus connections locally, regionally and nationally. The City Centre benefits from high visual amenity, with the majority of the centre falling within Conservation Areas.

10.14 Arising from the historic layout of the City, Gloucester has a relatively compact central shopping area with retail provision focused around The Cross and the four 'gate' streets leading from it.

10.15 With a drive-time of around 20 minutes, Cheltenham is Gloucester's nearest competitor. However, Gloucester's location on the motorway network means that it competes with numerous other centres including Worcester to the north and Bristol City Centre and The Mall at Cribbs Causeway.

10.16 The MHE Shopping Index 2008 shows that Gloucester is ranked 70, four places behind Hereford and eight behind Worcester. PROMIS estimates that the town centre retail floorspace in Gloucester is circa 124,000 sq m, which is above the Major Town average in their ranking.

10.17 According to a 2007 PROMIS report, Gloucester has a slightly below average volume and quality of retail provision relative to the size and affluence of the shopping population. The city also has poor provision of anchor stores with Debenhams being the only department store. The situation is similar with regard to up-market fashion, with retailers favouring Cheltenham for their regional requirements.

10.18 There are several significant development sites coming forward within the next few years in the Gloucester area. Of these schemes, two fall within the City Centre whilst others are at Gloucester Docks and Gloucester Quays. In 2001 outline planning permission was granted for the 20,000 sq m development of retail, office and leisure space called the Blackfriars Centre. However the High Court ruled this planning permission invalid. The Council are understood to be seeking a new development partner for the scheme. Additionally, a site has been allocated for a mixed use scheme at the King's Square Bus Station site to comprise of a shopping centre, offices and residential space. The shopping centre is understood to be linked to the existing Kings Square Shopping Centre although an application is yet to be submitted.

10.19 In May 2009, Gloucester Quays Designer Outlet Centre opened at Bakers Quay, circa 1 mile from Gloucester City Centre. The development includes factory outlet shopping (circa 20,438 sq m net), a 7,800 sq m supermarket, a hotel, bars, restaurants and waterfront apartments. Key retailers include Next Clearance, Gap Outlet and Marks & Spencer Outlet, as well as quality fashion retailers Austin Reed, Hawes & Curtis, LK Bennett and CK Jeans. Opening of the malls has been phased and certain elements of the scheme have been altered to adapt to falling levels of demand.

10.20 The fall in retailed demand is reinforced by the number of retail requirements identified by PROMIS within the town, with local agents suggesting that retailers had awaited the opening of Gloucester Quays and its impacts before considering taking space in the City Centre.

10.21 A 2006 Retail PROMIS survey indicated that the vacancy rate in Gloucester town centre stood at 7.1% of units (below the PROMIS average). At the time of the March 2009 PROMIS survey the vacancy rate in Gloucester City Centre stood at 12.2% of units, higher than the 7.1% recorded in July 2007.

10.22 According to the PROMIS report, at mid 2007 agent sources estimated prime rents in Gloucester at £135 psf Zone A. Agents also placed prime retail yields at 4.75% in Spring 2007, showing no change on the level 6 months previous in line with the pattern across the majority of the PROMIS Centres. This figure places yields at the same level as Hereford and indicates that Gloucester is considered to have strong potential for future growth and is perceived favourably by investors.

Cheltenham

10.23 Cheltenham is a large spa town located approximately 47km south-east of Hereford and seven miles from Gloucester. The town is very well connected and easily accessible by all public and private transport with good rail, bus and road links to the rest of the country. The town centre benefits from high visual amenity, and is famous for its regency architecture.

10.24 Despite the close proximity of Cheltenham to Gloucester, the town is highly regarded for its retail and leisure provision, with many stores catering for the upper end of the market. Other town centre uses are also renowned in Cheltenham, including its restaurant provision which includes 'Le Champignon Sauvage', a Michelin two star restaurant.

10.25 A MHE Shopping Index 2008 ranking of 22 reflects the volume and quality of retail provision in Cheltenham and places the town significantly higher in the rankings than Hereford.

10.26 The August 2007 survey by Retail PROMIS identified a vacancy rate in Cheltenham town centre of 10% of units. By March 2009, the PROMIS survey noted that this figure had increased slightly to 12.3% of units and was broadly comparable to the 2009 PROMIS average.

10.27 In terms of retailer demand, at July 2010 there were 38 town centre reported requirements identified for Cheltenham.This figure demonstrates that Cheltenham has a relatively high level of demand for a town of its size and status. Retailers that have recently expressed interest in the town include fashion multiples Republic, Zara and LK Bennett, further illustrating Cheltenham's provision of high-quality fashion and speciality retailers.

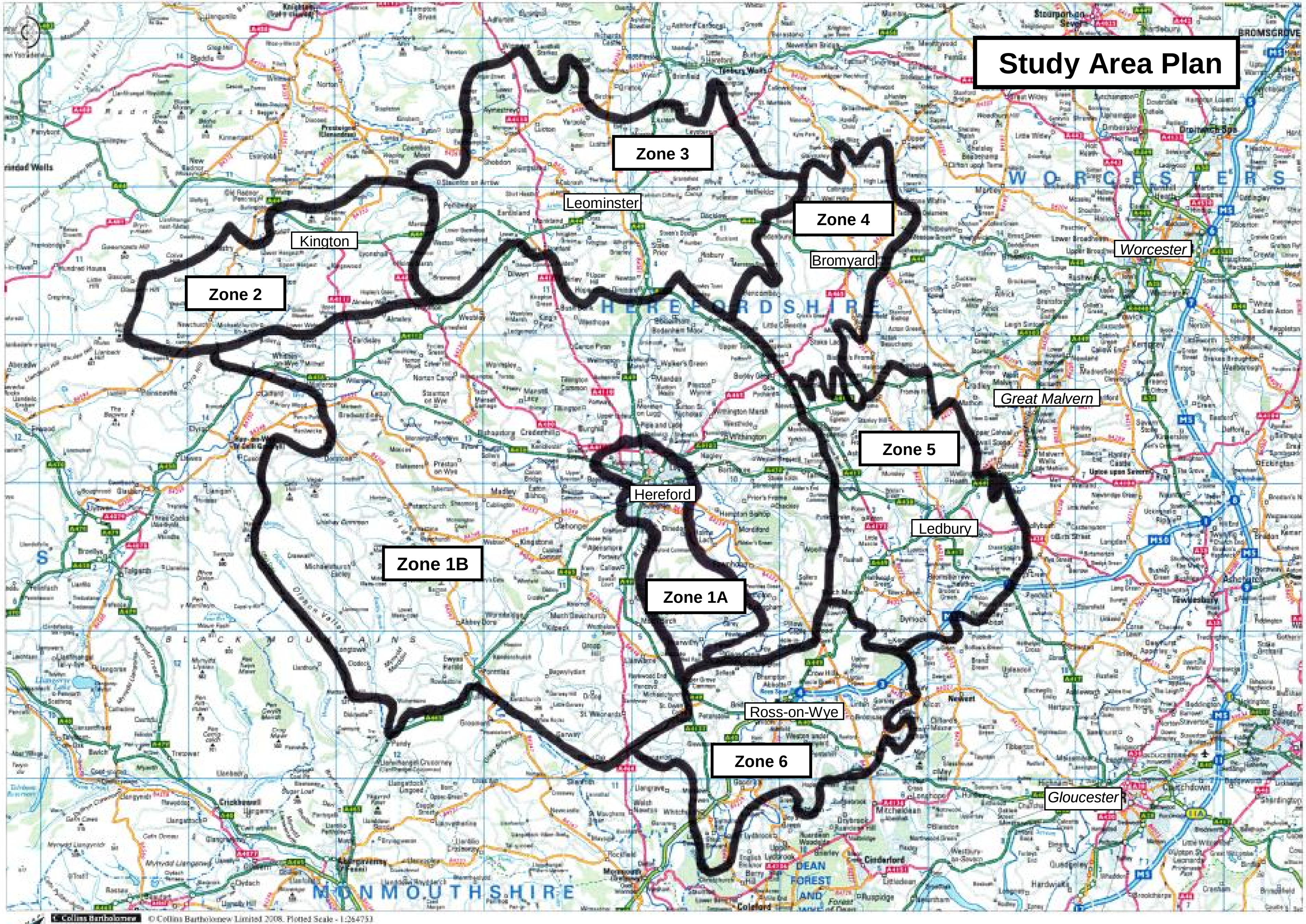
10.28 According to the Focus Town Centre Report (January 2008), 80% of top 20 retailers are present in the town centre. Of the 20% not present, John Lewis is the highest ranked retailer absent.

10.29 The PROMIS report estimated that prime rents in Cheltenham in mid 2007 were £210 psf Zone A, compared to £160 psf in Worcester and £135 in Hereford. This figure represents no change on the end 2006 levels. The PROMIS report also states that agent sources placed retail yields at 4.75% in Autumn 2007, showing an outward yield shift on the level six months previously. Whilst prime rents in Cheltenham have fallen from £210 psf in Zone A in mid 2007 to an estimated £185 psf Zone A, the town retains the status of having the highest rentals of the comparative centres covered in this report.

10.30 There is no additional floorspace currently under construction within Cheltenham Town Centre, although there are several retail warehouse schemes in the development pipeline.

Appendix 1

Study Area Plan



Drivers Jonas Deloitte.