



Additional Retail Commentary for
Deeley Properties Limited

LAND SOUTH OF LEADON WAY, LEDBURY, HEREFORDSHIRE, HR8 2JQ

January 2021

Our Ref: 19-01809

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Appendix 2	Capacity, Turnover and Impact Tables

QUALITY ASSURANCE

This report has been prepared within the quality system operated at Rapleys LLP according to British Standard ISO 9001:2008.

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1 INTRODUCTION

1.1 This Statement provides further commentary and updated ‘sensitivity testing’ of the applicant’s supporting retail impact assessment in response to observations made by Barton Willmore on behalf of Co-operative Estates on 11th December 2020. For the readers assistance, a full copy of this commentary can be found at **Appendix 1**.

1.2 This Statement is structured as follows:

- **Section 2 - Commentary Breakdown** - Provides a synopsis of key themes and statements within Barton Willmore’s commentary.
- **Section 3 - Retail Impact Sensitivity Testing** - Provides a revised Retail Impact Assessment, which objectively considers further scenarios in relation to trade draw assumptions.
- **Section 4 - Analysis of Other Matters** - Provides a response to other matters (other than retail impact) raised within Barton Willmore’s commentary.
- **Section 5 - Summary and Conclusions** - Provides a summary of all the material considerations to Barton Willmore’s commentary.

2 COMMENTARY BREAKDOWN

2.1 This section presents a synopsis of Barton Willmore's representations.

Co-operative Food and Ledbury

2.2 Barton Willmore state:

"...The Co-op store is less than 300m from the Primary Retail Area of Ledbury which starts on The Southend, directly to the east of the Co-op store. The walk between the Town Centre's Primary Retail Area and the Co-op store is a simple one along New Street with no barriers to pedestrian movement. The proximity of the Co-op store and its car park to Ledbury Town Centre means that linked trips do occur between the store and the Town Centre. Indeed, the Co-op foodstore operates as part of Ledbury Town Centre."

"If trade is lost from Co-op to an out-of-centre store trade will also be lost from Ledbury Town Centre. We assert this not just because of the physical characteristics explained above but because it is our client's direct experience. The Aldi foodstore on Leaden Way opened in 2017 and as a result the Co-op store in Ledbury saw an immediate 19% reduction in turnover - or a 19% impact on store turnover."

"Furthermore, we would like to highlight that the turnover of the Co-op foodstore is significantly overstated by Rapleys (in the region of £1m), this again will mean that the impact on Co-op is understated. If the turnover of Co-op is overstated there is also a very real risk that the turnover figures for other stores and the centre of a whole is inaccurate."

Commentary on the Retail Assessment prepared by Rapleys

In addition, the following points are highlighted:

"First, in relation to the sequential assessment, we note that Rapleys have failed to examine the accessibility of their own site in comparison to other sites that may be suitable and available. This is a very important point because for a site to be sequentially preferable it does not simply have to be closer to the designated retail centre in question. Paragraph 87 of NPPF clearly states:

"When considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre."

It is our understanding that the application site, whilst positioned favourably in terms of the road network and access by car, is not readily accessible by public transport. The applicant should examine out of centre sites as well as in and edge of centre ones because others might be sequentially preferable due to their proximity to bus services for example. On this basis the Sequential Assessment fails to comply with national planning policy in relation to the application of the sequential test."

2.3 Additional comments made by Barton Willmore also state:

1. Inadequate expenditure capacity for the proposed Lidl;
2. Alternative sales densities for the proposed foodstore should be considered(e.g. Tesco and Asda);

-
3. Lack of commentary on the implications of COVID - Barton Willmore state that the effect of the pandemic on the retail market is that online sales (including for food) has increased markedly. Research by the High Street Task Force (which is available to view on their website) shows that there has been a 72% increase in online shopping, 85% of people are making fewer physical shopping and a quarter of all people are now rethinking how they shop; and that more people are switching permanently to online shopping which has rocketed to over 30% of total spend for all goods.
 4. There is no analysis on whether leakage levels are acceptable - Outlines that Rapleys say in their original Retail Assessment that they will claw back what constitutes about 50% of existing the leakage from the catchment area; however, there is no examination of whether the current levels of leakage are indeed an issue.

2.4 We respond to these comments in Section 3 below.

3 RETAIL IMPACT SENSITIVITY TESTING

- 3.1 In light of Barton Willmore's assertion that the Co-op only has a turnover of circa. £1m, Rapleys have taken the opportunity to provide a further 'sensitivity test' scenario based on the most up to date Household Survey data available.
- 3.2 The 'sensitivity test' provided in this section and at Appendix 2 utilises 2018 Household Survey data prepared and submitted in support of a planning application for a Lidl foodstore in Ross-on-Wye (application ref. 190114). The broad methodology of this survey was discussed and agreed with the Council; and follows the methodology of the Council's 2012 Retail Study survey. The date of the household survey also post-dates the trading of Aldi at Ledbury.
- 3.3 Rapleys note that the £1m turnover figure provided by Co-op's consultant cannot be independently or objectively verified. As such, it cannot just be taken at 'face value', particularly when ensuring other store turnovers are considered on a consistent basis. Providing additional shopping pattern data based on the 2018 Household Survey, therefore provides a verifiable and consistent data source.
- 3.4 With the above considerations in mind, this Statement's quantitative assessment is set out within a series of Tables in Appendix 2. In summary, they provide the following information:
- **Table 1** - Population forecasts within the agreed 10-minute drivetime catchment area;
 - **Table 2** - Provides per person convenience and comparison goods spending forecasts;
 - **Table 3** - Provides total turnover forecasts on convenience and comparison goods within identified catchment area;
 - **Table 4** - Provides predicted turnover figures for the proposed Lidl store. Predicted turnovers based on Lidl average sales densities (benchmark turnover);
 - **Table 5** - Provides theoretical expenditure capacity for convenience and comparison goods within the catchment area;
 - **Tables 6** - Provides predicted trade diversion patterns (impact) from existing retailers to the proposed store. Where applicable in assessment allows for identified planning commitments (i.e. Implementable retail planning permissions). An allowance is also made for expenditure inflow from other locations outside the agreed 10-minute drivetime catchment. Existing store turnovers are based on Household Survey turnovers.
 - **Tables 7A - 7F** - Provides convenience shopping Household Survey base data.
 - **Table 8** - Provides comparison shopping Household Survey base data.
 - **Table 9** - Provides a summary between the original trade draw assessment; JWPlanning's trade draw assessment; Revised trade draw assessment (November 2020); and the 2018 household survey derived impact.
- 3.5 Before outlining predicted trade diversion patterns based on the 2018 household survey derived turnovers for existing stores in Ledbury, it is important to understand the role of existing retailers within Ledbury. Specifically, this includes whether stores are principally a main-food (weekly shopping) destination or perform more of a top-up (limited ad-hoc shopping for key items) role. Understanding this key dynamic will influence whether the

proposed Lidl foodstore will compete within the same market space as existing retailers and if so, the extent of this overlap. To that end Table 7F at Appendix 2 undertakes this assessment and is summarised within Table 3.1 below.

Table 3.1 Main-food and Top-up shopping patterns

	Main-Food Turnover Ratio (%)	Top-up Turnover Ratio (%)
Aldi, Leadon Way, Ledbury	80.0%	20.0%
Co-op, New Street, Ledbury	58.7%	41.3%
Jenkins Greengrocers, The Homend, Ledbury	56.6%	43.4%
One Stop, The Homend, Ledbury	0.0%	100.0%
Spar, A417, Parkway, Ledbury	14.5%	85.5%
Tesco Superstore, Orchard Lane, Ledbury	70.1%	29.9%
Local shops, Ledbury Town Centre	58.5%	41.5%

Source: Proportions based on responses to the 2018 Household Survey

- 3.6 Firstly, it is important to note that the proposed Lidl store format will primarily compete with stores that provide for the main-food shopping needs of residents
- 3.7 Table 3.1 demonstrates that Ledbury Town Centre itself has a limited foodstore offer from the One Stop, Spar, and various independent retailers; primarily cater for resident's top-up shopping needs. As the proposal is a discount foodstore operator, this means it serves a greater main food shopping role, with proportionally much lower levels of top-up. Lidl's primary competitors are therefore other discount retailers and other larger foodstore operators which have a certain level of overlap in offer to that of a discount operator. This position is supported by national practice planning guidance (NPPG) and relevant Appeal Case Law, under the 'like-trades-with-like principle'. On this basis, it is therefore unlikely that a significant proportion of trade will be diverted from existing town centre stores.
- 3.8 As is evidenced by the applicant's retail assessment, it is considered that the proposal's key competitors will be the existing Tesco and Aldi. The proposed Lidl will - in Rapleys view - not divert any trade from the existing One Stop as 100% of its trade can be attributed to top-up shopping trip according to the Household Survey results. In addition, with a broad 60/40% split for main-food/top-up shopping trips for Co-op and other retailers, it is also considered that the proposal will not directly compete with these facilities; and that any potential trade diversion will be modest. Indeed the nature of top-up shopping is localised and as such will not materially affect the overall trips into and around town centre shops. As has been highlighted in our previous response, shopping patterns adjusted in Ledbury town centre when Aldi started trading in August 2017. The presence of Lidl will not significantly alter those existing shopping patterns within the town centre.
- 3.9 To assist in comparing the various trade diversion patterns considered as part of consideration of the application proposal, Table 8 at Appendix 2, and Tables 3.2 to 3.4 below summarises the various scenarios considered.

Table 3.2. Ledbury Town Centre Trade Diversion Patterns (2025)								
	Original Diversion		JWPlanning Diversion		Revised Diversion (November 2020)		Household Survey Diversion	
	£m	%	£m	%	£m	%	£m	%
One Stop	£0.08	0.75%	£0.21	1.90%	£0.16	1.50%	£0.00	0.00%
Spar	£0.08	0.75%	£0.21	1.90%	£0.16	1.50%	£0.03	0.25%
Other Stores	£0.08	0.75%	£0.41	3.80%	£0.16	1.50%	£0.08	0.75%
Total	£0.24	2.25%	£0.80	7.70%	£0.49	4.50%	£0.11	1.00%

Source: Table 9, Appendix 2

Table 3.3. Ledbury Town Centre Impact (2025)				
	Original Impact %	JWPlanning Impact %	Revised Impact (November 2020) %	Household Survey Impact %
One Stop	5.3%	13.4%	10.6%	0%
Spar	6.3%	15.9%	12.6%	8.17%
Other Stores	2.8%	14.1%	5.6%	8.5%
Overall Town Centre	4.2%	14.3%	8.5%	7.21%

Source: Table 9, Appendix 2

Table 3.4. Edge/ Out of Centre Diversion (2025)								
	Original Diversion		JWPlanning Diversion		Revised Diversion (November 2020)		Household Survey Diversion	
	£m	%	£m	%	£m	%	£m	%
Aldi Leadon Way	£4.70	44.75%	£3.72	35.40%	£4.52	43.00%	£5.29	48.6%
Co-Op	£0.53	5.0%	£1.01	9.60%	£0.89	8.50%	£0.41	3.75%
Tesco	£2.36	22.5%	£2.77	26.40%	£2.42	23.00%	£2.85	26.15%
Other Stores	£0.05	0.5%	£0.11	1.00%	£0.05	0.50%	-	-
Total	£7.64	72.75%	£7.61	72.30%	£7.88	75.00%	£8.55	78.50%

Source: Table 9, Appendix 2 Note: Other stores category not included within Household Survey Results.

- 3.10 Before analysing the patterns above, it is important to note that Co-op have asserted that they have lost 19% of their trade due to the opening of the Aldi; and as a result they are only trading at £1m. It follows that if this is the case, the store was previously trading at approximately £1.2m per annum prior to the arrival of Aldi. Taken at face value, this would

suggest that the Co-op store was already significantly under-trading against company average benchmark figures.

- 3.11 However, the 2018 household survey data clearly shows that the Co-op trades at over £3m. It is also important to consider that Household Surveys - due to their reliance on the memory of respondents - tend to slightly under-estimate trading patterns to shops with higher levels of top-up trade. As such, we consider that it is more appropriate to test the 2018 survey derived figure for the Co-op, Ledbury store, alongside the survey derived figures for other existing retailers within the catchment of the proposal. This is because the figures are based on an objective and independent household survey, providing a consistent and up to date picture of shopping patterns.
- 3.12 In addition, when considering the impact figures above, it should be noted that Rapleys have not changed the overall predicted turnover to be taken from the catchment area (£8.66m) from that of the November 2020 assessment. This figure is only slightly lower than the estimations of JWPlanning. The only changes that have occurred have been to existing turnover figures and trade diversion percentages.
- 3.13 In light of the above, Table 3.5 below summarises the predicted impact of the proposed Lidl store on existing centres within the study area.

Table 3.5 Revised Town Centre Trade Diversion & Impact (Convenience Goods)							
	Pre-proposal Turnover (£m)		Post-proposal Turnover (£m)		Diversion (£m)		Impact %
	2020	2025	2020	2025	2020	2025	2025
Ledbury Town Centre	£1.64	£1.51	£1.51	£1.40	£0.12	£0.11	7.21%
Edge/ Out of Centre stores/ locations Catchment Area	£29.23	£27.47	£20.13	£18.92	£9.10	£8.55	
Locations outside the Catchment Area.	£2.50	£2.35	£1.28	£1.20	£1.22	£1.14	
Inflow Expenditure					£1.16	£1.09	
Total Turnovers *	40.13	37.72	30.06	28.26	11.18	10.51	

Source: Table 8, Appendix 2. Notes: Figures may appear rounded +/-

- 3.14 The revised assessment demonstrates that, taking into account the household survey derived turnovers, the predicted convenience impact on the town centre will be 7.21%. This compares to the 4.2% impact originally forecast and 8.5% impact under our November 2020 assessment.
- 3.15 As highlighted in our November 2020 representations, we note that JWPlanning estimate that 3.8% of the proposal's turnover would be from other local in-centre stores. Our review of Experian GOAD (outlines town centre uses) shows that apart from the One Stop and Spar, the centre only has two butchers (DT Waller and Gurneys), a greengrocer (Handley), two artisan bakeries (Home and Bakery Shop & Jade's Humble Bakes). In our view, these stores do not compete with discount food retailers, so taking a total of £410k (3.8%) from these stores is wholly unrealistic. Indeed this point is underlined by the results of the 2018 household survey,

with shopping patterns clearly indicating that Ledbury is not a main food shopping destination. Accordingly, it is considered that the predicted impact of the proposed will range from 4.2 - 8.5%.

- 3.16 In addition, this assessment only considers convenience impact and does not include comparison impact as the proposed provides a very limited comparison offer. If comparison goods impact is considered, the proposals impact on the town centre, and in turn the Co-op will be lower. As such, the assessment provided is considered to be robust.
- 3.17 Household Survey data at Table 8 at Appendix 2 confirms that comparison shops in Ledbury achieved a total turnover of approximately £23m in 2018. When combined with Household Survey convenience turnovers (£1.5m [2018]), Ledbury has a total turnover of approximately £24.5m. As is evident from the 2018 household survey derived figures, it is clear that the sale of comparison goods is proportionately (at 94%) the main driver for maintaining the centre's viability and vitality by a significant margin. Conversely, convenience retailing has a much more modest turnover at 6% of the town centre's total combined turnover. Accordingly, it is reasonable to assume that the proposed Lidl in terms of its offer, will not undermine the viability and vitality of the centre as a whole.

SEQUENTIAL TEST

- 3.18 Rapleys note that the Council's independent retail planning consultant (JWPlanning) conclude that there are no viable and available sites that can accommodate the development proposed.
- 3.19 Rapleys has provided a robust and thorough review of sequential sites. This demonstrates that there are no sequentially preferable, suitable or available sites to accommodate the application proposal. This includes an assessment of the connectivity of the site to public transport provision. It should be noted that the proposal is a mixed-use development and not simply a Lidl foodstore.

LINKED TRIPS

- 3.20 There is no verifiable data to confirm the Co-op's role in providing linked trips towards the centre and therefore it is difficult to objectively assess the level and nature of any linked trips. Notwithstanding that, the household survey results do provide data to understand the nature of shopping trips undertaken at the Co-op store. As outlined above in Table 3.1, the data indicates that residents undertake a large proportion of their shopping trips at the Co-op as 'quick' top-up shopping visits. Whilst it is possible that shoppers then go on to visit the rest of the centre, it is also likely that - due to the presence of the associated car park - that shopping trips are car borne and short in nature being pass-by trips due to the store's location along New Street.

RETAIL CAPACITY & AVAILABLE EXPENDITURE

- 3.21 Retail capacity is not a retail policy test for decision making. In addition, as noted within previous versions of our assessment, capacity figures are theoretical and are shown for information purposes.

RETAIL SALES DENSITY

- 3.22 The proposed foodstore is to be occupied by a named retailer (Lidl) for the long-term and is not speculative. The format and layout of the store is specifically designed for occupation by a discount foodstore operator as outlined in Appendix 2 of the Planning and Retail Statement.
- 3.23 Rapleys consider that the likelihood of the store being occupied by either Tesco or ASDA is very limited as they have a different trading model being mainstream convenience retailers. It is also standard practice that appropriate conditions can be applied by the Local Planning Authority which are specific to discount foodstore operators, as distinct from mainstream food retailers. As such, the retail sales density used within the submitted retail assessment is entirely appropriate. The testing of the retail sales densities of other mainstream retailers is therefore not necessary.

COMMENTARY ON THE IMPACTS OF COVID-19

- 3.24 The impact assessment previously provided (November 2020) and outlined above does consider the impact of COVID based on quantifiable growth rate figures provided by Experian within the Experian Retail Planner Briefing 18, published in October 2020; and from updated sales density figures from Mintel (September 2020).
- 3.25 Experian highlight a net increase in convenience spend of 8.4% in 2020, as a result of bulk buying from March 2020 onwards, due to the COVID-19 pandemic; and updated sales densities from Mintel. However, Experian predict the most of this growth will be cancelled out in 2021, with a 6.2% decrease in spend. From 2022 onwards, growth in spend is predicted to range from 0 - 0.2%.
- 3.26 In terms of comparison goods expenditure, there has been an 8.5% decrease in spend primarily as a result of the growth in convenience spend and higher than expected growth in online

(Special Forms of Trading) shopping. Notwithstanding, the results of our revised capacity assessment are outlined below.

- 3.27 Furthermore, increases in internet shopping (Special Forms of Trading [SFT]) have also been accounted for within Table 2 of the assessment.
- 3.28 Notwithstanding the above, Barton Willmore assert that there has been a significant increase (72%) in online shopping. However, no further information is provided to justify this claim; nor do the figure provided take into account SFT differences between convenience and comparison goods. In addition, regard has been had to the overall online convenience goods market share. Based on Experian's data, online shopping only accounts for 6.3% (2020) of market (Source: Experian Retail Planner Briefing Note 18 - Appendix 3). Experian also highlight a 30% increase with this market share. Experian also predict that online market share will fall slightly to 5.4% in 2021.
- 3.29 Furthermore, with exception of Tesco, none of the existing retailers within Ledbury have a significant presence online. As such, it is considered that whilst in-person shopping trips may have decreased, the amount spent during shopping trips has increased.
- 3.30 Overall, given that COVID measures are currently on going, the full effects cannot be fully determined until retail shopping patterns are normalised; and it is considered that Barton Willmore are conflating online shopping growth to overall market share. Online shopping levels remain relatively low for convenience goods.

RETAIL EXPENDITURE LEAKAGE

- 3.31 The existing leakage from the catchment is relatively modest at £2.35m (2025). The amount of predicted clawback trade only amounts to circa. 10% of the proposal's turnover. Rapleys also note that the Council's JWPlanning's independent review of this matter raises no concerns.

4 SUMMARY AND CONCLUSIONS

- 4.1 This Statement has assessed the proposed development against the NPPF, relevant policies contained within the Development Plan and other relevant material considerations.
- 4.2 It is also important to note that the proposed Lidl foodstore forms part of a wider development which will provide additional medical and nursery facilities in Ledbury; uses which are supported within the Core Strategy and adopted Neighbourhood Plan. Bringing forward the foodstore will provide the capital to deliver these facilities.
- 4.3 It is concluded that the proposal is in accordance with national policy and the Development Plan, and there are no other material considerations that indicate planning permission should not be forthcoming. The development proposals constitute sustainable development for the following reasons:
- The proposal will provide a new discount foodstore for the residents of in the Ledbury area;
 - The proposal will improve customer choice and enhance the shopping experience for shoppers within Ledbury and the neighbouring areas;
 - There are no suitable or available sites - which could accommodate the development proposed - in or on the edge of Ledbury Town Centre;
 - There are no units (occupied or vacant) which can reasonably accommodate the development proposed;
 - Ledbury Town Centre's convenience goods offer is limited to small shops and are primarily independent retailers.
 - The proposals impact on the town centre will be limited between **4.2% to 8.5%** by 2025;
 - The proposals fully comply with both the sequential and retail impact tests set out within the NPPF;
 - The proposed building will provide a clean and contemporary design that will be complimentary to the visual character of the surrounding area;
 - The development will contribute significantly to the local economy during the construction phase and over its lifetime with the creation of 200 jobs during the construction phase and 65 jobs at the nursery and foodstore; and
 - New improved landscaping will be provided within the site providing a high level of visual amenity.
- 4.4 Overall, the proposed scheme adopts the principles of sustainable development, in relation to social, economic and environmental factors. The proposals accord with the emphasis in national policy contained within the NPPF, which confirms a presumption in favour of sustainable development.
- 4.5 In these terms, it has been demonstrated that the scheme complies with relevant policy as set out within the NPPF and the Development Plan. Therefore, the application should be supported.
- 4.6 In light of all of the above, it is considered that the proposal therefore is compliant with paragraphs 86, 87 and 89 of the NPPF.

APPENDIX 1: BARTON WILLMORE LETTER, DATED 11TH DECEMBER 2020.

Mr C Brace
Planning Services
Herefordshire Council
PO BOX 4
Hereford
HR1 2ZB

VIA EMAIL ONLY: cbrace@herefordshire.co.uk

32436/A3/NR

11 December 2020

Dear Mr Brace,

RE: A HYBRID APPLICATION COMPRISING: AN APPLICATION FOR FULL PLANNING PERMISSION FOR THE ERECTION OF A CHILDREN'S DAY NURSERY (USE CLASS D1), FOOD STORE (USE CLASS A1), WITH ASSOCIATED ACCESS, LANDSCAPING AND ASSOCIATED WORK; AND AN APPLICATION FOR OUTLINE PLANNING PERMISSION FOR THE ERECTION OF A MEDICAL CENTRE (USE CLASS D1), WITH ALL MATTERS BAR ACCESS RESERVED. REFERENCE P201718/O COMMENTS ON BEHALF OF CO-OPERATIVE ESTATES

We write on behalf of our client, Co-operative Estates, in connection with the above planning application which was submitted by Deeley Properties Ltd and Countrywide Farmers PLC ("the applicants") and is currently under consideration by Herefordshire Council ("the Council"). We have reviewed the planning application submission in full, including the additional and revised information submitted to the Council recently, and have a number of significant concerns about the proposed development, particularly its impact upon Ledbury Town Centre.

A particular matter that we feel should be raised at the outset, relates to the fact that the planning application is made as a 'hybrid' submission, with only outline details submitted for the medical centre but full information provided for the foodstore (operated by Lidl GmbH) and children's day nursery. This immediately raises the question of what assertion, or assumptions, can be made for the delivery of the medical centre? The medical centre element of the proposed development is, arguably, the part of the proposed development which is most needed in Ledbury but with no timescales or assurances provided over its delivery its viability is brought into question. We would also question the applicant's intention to deliver the medical centre as they have not consulted with Worcestershire Clinical Commissioning Group, which is evidenced by their letter of 30th July 2020. It is a key component of the proposed development which goes to the heart of the matters under review, it is a clear benefit that could arise, and it is relied on as such by the applicants, and for it to be seen as such and its benefits weighed in the planning balance during the determination of the application further information must be provided to give clarity of its delivery.



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Co-operative Food and Ledbury

Our client operates a circa 10,000sqft gross foodstore on New Street on the edge of Ledbury Town Centre. The store is supported by a circa 100 space car park which is free for customers to use for a 2-hour period. The Co-op store is less than 300m from the Primary Retail Area of Ledbury which starts on The Southend, directly to the east of the Co-op store. The walk between the Town Centre's Primary Retail Area and the Co-op store is a simple one along New Street with no barriers to pedestrian movement. The proximity of the Co-op store and its car park to Ledbury Town Centre means that linked trips do occur between the store and the Town Centre. Indeed, the Co-op foodstore operates as part of Ledbury Town Centre.

If trade is lost from Co-op to an out-of-centre store trade will also be lost from Ledbury Town Centre. We assert this not just because of the physical characteristics explained above but because it is our client's direct experience. The Aldi foodstore on Leadon Way opened in 2017 and as a result the Co-op store in Ledbury saw an immediate 19% reduction in turnover – or a 19% impact on store turnover.

Impacts such as that experienced when Aldi commenced trading in Ledbury are a major concern for our client because it compromises the existing store's viability. Having already absorbed a 20% reduction in turnover the store is unlikely be able to sustain another impact of a similar magnitude. Furthermore, we would like to highlight that the turnover of the Co-op foodstore is significantly overstated by Rapleys (in the region of £1m), this again will mean that the impact on Co-op is understated. If the turnover of Co-op is overstated there is also a very real risk that the turnover figures for other stores and the centre of a whole is inaccurate.

Retail Assessment prepared by Rapleys

Lidl GmbH has commissioned Rapleys to prepare a Retail Sequential and Impact Assessment to support the planning application. That Assessment dated May 2020 was subsequently updated by a Retail Addendum dated November 2020, which answers comments made by JW Planning on behalf of the Council. As the more up to date of the two documents submitted relating to Retail Planning Issues, our observations and comments relate, in the main, to the Retail Addendum but are points which underpin the whole retail case.

We do not look to find extensive fault in the workings of the Assessment by Rapleys, but we have identified some major issues with the way that they have conducted the sequential assessment and their calculations (and therefore conclusions) on the retail impact assessment.

First, in relation to the sequential assessment, we note that Rapleys have failed to examine the accessibility of their own site in comparison to other sites that may be suitable and available. This is a very important point because for a site to be sequentially preferable it does not simply have to be closer to the designated retail centre in question. Paragraph 87 of NPPF clearly states:

"When considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre."

It is our understanding that the application site, whilst positioned favourably in terms of the road network and access by car, is not readily accessible by public transport. The applicant should examine out of centre sites as well as in and edge of centre ones because others might be sequentially preferable due to their proximity to bus services for example. On this basis the Sequential Assessment fails to comply with national planning policy in relation to the application of the sequential test.

With regards to the Impact Assessment, we have identified some fundamental issues. These issues can be summarised as:

1. **Capacity for the proposed Lidl store is expressed incorrectly.** The applicant identifies total available convenience goods expenditure and then deducts the predicted turnover of the store to conclude that there is capacity. To calculate capacity, total available expenditure should be compared against the existing total turnover of stores. Within the Herefordshire

Council Town Centre Study 2012 the Council has identified that there was a requirement of between 846sqm and 1,946sqm convenience floorspace but since those figures were produced the Aldi store on Leadon Way has been built and is open to trade. The Aldi store absorbed all identified capacity – there is no capacity for additional food retail floorspace in Ledbury. This fact is supported by Rapleys identifying £35.25m of total available convenience goods expenditure in the catchment area versus a total turnover of existing stores of £40.13m (these figures are at 2020 and taken from the Retail Addendum). Within their Assessment Rapleys have demonstrated that there is over provision in the catchment area in the region of £5m without the proposed Lidl store. If there is an oversupply of floorspace then stores are going to have turnover levels below benchmark level which in turn means that the introduction of a new store will have a greater, more harmful impact than it might otherwise.

2. **Within their retail tables Rapleys only use Lidl's sales density rate.** Contrary to national planning guidance, they do not examine the scenario of the store being operated by a mainstream retailer such as Asda or Tesco, which has a higher sales density rate, at some point in the future. If this is not undertaken then any planning consent must be restricted so that the proposed store can only be occupied by a deep discount retailer. This is because a mainstream operator would have a higher turnover and a greater trade diversion from existing retailers. If there is a high level of trade diversion it needs to be tested in an impact assessment to ascertain whether it would result in a significant adverse impact. It is a requirement of NPPG Paragraph 18 that applicants:

"consider a range of plausible scenarios in assessing the impact of the proposal on existing centres and facilities".

3. **There is no commentary on the implications of COVID.** The effect of the pandemic on the retail market is that online sales (including for food) has increased markedly. Research by the High Street Task Force (which is available to view on their website) shows that there has been a 72% increase in online shopping, 85% of people are making fewer physical shopping and a quarter of all people are now rethinking how they shop. More people are switching permanently to online shopping which has rocketed to over 30% of total spend for all goods. The implication for these structural changes to the retail market for this planning application is that total available expenditure is more than likely to be significantly overstated. If total available expenditure is over-stated then the overprovision of retail floorspace in Ledbury is higher than already demonstrated by Rapleys. Therefore, making it likely that a significant adverse impact will arise contrary to Chapter 7 of NPPF and Local Plan Core Strategy Policy E5.
4. **The Market is not mentioned within their retail assessment.** Ledbury Market is held twice a week but there is no mention of it within Rapleys' retail assessment or of the impact upon it.
5. **Rapleys are claiming that Lidl turnover will be one third of the total available expenditure available in the catchment area.** This is a disproportionate amount of expenditure to be claiming in such a small market area, especially with three large/medium scale national multiple foodstores present as well as the local market and convenience stores. It again indicates that the proposals will have a significant adverse impact upon Ledbury.
6. **There is no analysis on whether leakage levels are acceptable.** Rapleys say in their original Retail Assessment that they will claw back what constitutes about 50% of existing the leakage from the catchment area; however, there is no examination of whether the current levels of leakage are indeed an issue. Within even the healthiest of retail markets there is some natural leakage of expenditure, some people prefer particular town centres or operators, or undertake foodshopping as part of their daily commute. There needs to be some analysis of the where the expenditure is currently leaking to and why, before Rapleys can conclude that it will be realistic for them to clawback 50% of it. Overstating clawback within an impact assessment means that the trade draw from existing retailers in the catchment area is understated and therefore mis-represented. This is a fact picked up by JW Planning who asked Rapleys to reduce the amount of clawback from 15% to 10%, however, there appears to be no justification for the 10% figure either; it could still be too high.

All of the above points are fundamental failings of the Retail Assessment prepared by Rapleys. We are firmly of the view that Rapleys do not provide a sufficiently robust assessment and that it cannot be concluded beyond reasonable doubt that there would not be a significantly adverse impact on Ledbury Town Centre as a result of the proposed development.

We can say with a degree of certainty through our own experience of the Aldi store opening in 2017 that if the Assessment is remedied in line with the above comments the level of impact shown will be far in excess of what is expressed by Rapleys.

Based on the above we conclude that the proposed development clearly fails the retail tests as expressed by NPPF and the development plan and planning permission should be refused on that basis.

We trust that these representations will be given due consideration in the determination of this planning application. We ask that we be notified in the event that any additional or amended information is submitted by or on behalf of the applicant, and that we be afforded the opportunity to comment further if we consider it necessary. Finally, we ask that we be notified of the Council's decision in due course.

Yours Sincerely



NICOLE ROE
Planning Associate

APPENDIX 2: CAPACITY, TURNOVER AND IMPACT TABLES

Table 1: Population Forecast for 10 Minute Drive Time Catchment

Year	2018	2019	2020	2021	2022	2023	2024	2025
Catchment Area	14,672	14,711	14,753	14,798	14,852	14,882	14,921	14,980
Total	14,672	14,711	14,753	14,798	14,852	14,882	14,921	14,980

Notes

Population Figures - ONS Based Population Projections (2017 Base Year). 2018 Figures based on ONS estimates
Figures Provided by Experian

Table 2: Convenience Expenditure Per Capita

Year	2018	2019	2020	2021	2022	2023	2024	2025
Expenditure (£) (with SFT)	£2,374	£2,353	£2,550	£2,392	£2,397	£2,397	£2,397	£2,397
Expenditure (£) (minus SFT)	£2,284	£2,254	£2,390	£2,263	£2,267	£2,260	£2,253	£2,248
SFT Expenditure (£)	£90	£99	£161	£129	£129	£137	£144	£149

Table 2b: Comparison Expenditure Per Capita

Study Area Zone	2018	2019	2020	2021	2022	2023	2024	2025
Expenditure (£) (with SFT)	£4,033	£4,206	£3,849	£4,099	£4,255	£4,382	£4,514	£4,649
Expenditure (£) (minus SFT)	£3,355	£3,470	£2,967	£3,205	£3,297	£3,366	£3,431	£3,506
SFT Expenditure (£)	£678	£736	£881	£894	£957	£1,017	£1,083	£1,144

Assumptions Regarding Available Expenditure on Convenience Goods

Year	2018	2019	2020	2021	2022	2023	2024	2025
Growth in Expenditure (%)	0.00%	-0.90%	8.40%	-6.20%	0.20%	0.00%	0.00%	0.00%
Non store spend (SFT) (%)	3.80%	4.20%	6.30%	5.40%	5.40%	5.70%	6.00%	6.20%

Assumptions Regarding Available Expenditure on Comparison Goods

	2018	2019	2020	2021	2022	2023	2024	2025
Growth in Expenditure (%)	0.00%	4.30%	-8.50%	6.50%	3.80%	3.00%	3.00%	3.00%
Non store spend (SFT) (%)	16.80%	17.50%	22.90%	21.80%	22.50%	23.20%	24.00%	24.60%

Notes

2018 Base Year Convenience Expenditure - Experian Micromarketer (February 2020)
Growth Rates - Experian Retail Planner Briefing Note 18 (October 2020) - Figure 1a
Special Forms of Trading (SFT) - Experian Retail Planner Briefing Note 18 (October 2020) - Appendix 3

Table 3: Total Convenience Goods Expenditure

Year	2018	2019	2020	2021	2022	2023	2024	2025
Expenditure (£m) (with SFT)	34.83	34.61	37.62	35.40	35.60	35.67	35.76	35.91
Expenditure (£m) (minus SFT)	33.51	33.16	35.25	33.49	33.68	33.64	33.62	33.68
SFT Expenditure (£m)	1.32	1.45	2.37	1.91	1.92	2.03	2.15	2.23

Notes

Source - Rapleys LLP Tables 1 & 2

Table 3b: Total Comparison Goods Expenditure

Year	2018	2019	2020	2021	2022	2023	2024	2025
Expenditure (£m) (with SFT)	59.17	61.88	56.78	60.66	63.19	65.22	67.35	69.65
Expenditure (£m) (minus SFT)	49.23	51.05	43.78	47.43	48.97	50.09	51.19	52.51
SFT Expenditure (£m)	9.94	10.83	13.00	13.22	14.22	15.13	16.16	17.13

Notes

Source - Rapleys LLP Tables 1 & 2

Table 4: Turnover of Proposed Lidl Store

	Gross Floorspace (sq.m)	Total Net Sales Floorspace (sq.m)	Benchmark Turnover (£/sq.m)	Total Store Turnover (£m)
Convenience	-	1,078	£10,005	10.79
Comparison	-	269	£10,005	2.69
Total		1,347	-	13.48

Notes

Benchmark Turnover - Sourced from Mintel Retail Rankings (2020)
2019 Prices

Table 5: Turnover of Proposed Store Compared to Available Convenience Expenditure within Catchment

	2020	2021	2022	2023	2024	2025
Catchment Area Available Expenditure (£m)*	35.25	33.49	33.68	33.64	33.62	33.68
Convenience Turnover of the Proposed Store (£m)	11.59	10.87	10.89	10.89	10.89	10.89
Percentage of Total Available Convenience Expenditure (%)	32.87	32.45	32.34	32.37	32.39	32.33
Expenditure Remaining (£m)	23.67	22.62	22.79	22.75	22.73	22.79

Notes

Adjusted for Density Growth - Experian Retail Planner Briefing Note 18 (October 2020) - Figure 3a
Catchment Area Available Expenditure - Rapleys LLP Table 3

Table 5b: Turnover of Proposed Lidl Comparison Floorspace Compared to Available Comparison Expenditure within Catchment

	2020	2021	2022	2023	2024	2025
Catchment Area Available Expenditure (£m)*	43.78	47.43	48.97	50.09	51.19	52.51
Comparison Turnover of the Proposed Store (£m)	2.57	2.74	2.84	2.92	3.01	3.10
Percentage of Total Available Convenience Expenditure (%)	6.1	5.8	5.8	5.8	5.9	5.9
Expenditure Remaining (£m)	41.09	44.70	46.13	47.16	48.18	49.41

Table 5c: Turnover of Proposed Lidl Floorspace (Convenience and Comparison) Compared to Available Total Expenditure within Catchment

	2020	2021	2022	2023	2024	2025
Catchment Area Available Expenditure (£m)*	79.03	80.92	82.65	83.73	84.81	86.19
Turnover of the Proposed Store (£m)	14.15	13.60	13.73	13.81	13.90	13.99
Percentage of Total Available Expenditure (%)	17.9	16.8	16.6	16.5	16.4	16.2
Expenditure Remaining (£m)	64.88	67.32	68.92	69.91	70.90	72.20

Notes

* Available expenditure excludes SFT
Adjusted for Density Growth - Experian Retail Planner Briefing Note 18 (October 2020) - Figure 3a
Catchment Area Available Expenditure - Rapleys LLP Table 3

Assumptions Regarding Convenience Sales Density Growth Rate

	2018	2019	2020	2021	2022	2023	2024	2025
Convenience Growth Rate (%)	0.0%	-0.9%	8.4%	-6.2%	0.2%	0.0%	0.0%	0.0%
Comparison Growth Rate (%)	0.0%	4.3%	-8.5%	6.5%	3.8%	3.0%	3.0%	3.0%

Table 6: Benchmark Convenience Turnover Calculations (10-Minute Drive Time)

CATCHMENT AREA LOCATIONS	Net Sales Area - Convenience (Sq.m) (2)	Benchmark Turnover Figure (£/per Sq.m) (3)	Benchmark Turnover in 2018 (£m)	HS Turnover in 2018 (£m)	HS Turnover in 2019 (£m)	HS Turnover in 2020 (£m)	HS Turnover in 2021 (£m)	HS Turnover in 2022 (£m)	HS Turnover in 2023 (£m)	HS Turnover in 2024 (£m)	HS Turnover in 2025 (£m)	Proposed Store Trade Diversion 2020 (£m)	Proposed Store Trade Diversion 2025 (£m)	Post Diversion Turnover 2020 (£m)	Post Diversion Turnover 2025 (£m)	HS - 2020 Impact %	HS - 2025 Impact %
Ledbury Town Centre (1)	1262		£5.67	£1.50	£1.50	£1.62	£1.52	£1.51	£1.51	£1.51	£1.51	£0.12	£0.11	£1.51	£1.40	7.14%	7.21%
One Stop, The Homend, Ledbury Town Centre	191	7919	£1.51	£0.23	£0.23	£0.25	£0.23	£0.22	£0.22	£0.22	£0.22	£0.00	£0.00	£0.25	£0.22	0.00%	0.00%
Spar, High Street, Ledbury Town Centre	171	7457	£1.28	£0.33	£0.33	£0.35	£0.33	£0.33	£0.33	£0.33	£0.33	£0.03	£0.03	£0.33	£0.31	8.17%	8.17%
Other Stores, Ledbury Town Centre	900	3200	£2.88	£0.94	£0.94	£1.02	£0.96	£0.96	£0.96	£0.96	£0.96	£0.09	£0.08	£0.94	£0.88	8.50%	8.50%
Edge / Out of Centre Locations (1)	2654		£30.12	£26.96	£26.96	£29.23	£27.42	£27.47	£27.47	£27.47	£27.47	£9.10	£8.55	£20.13	£18.92	31.12%	31.12%
Aldi, Leaddon Way, Ledbury	982	12387	£12.16	£11.07	£11.07	£12.00	£11.26	£11.28	£11.28	£11.28	£11.28	£5.63	£5.29	£6.37	£5.99	46.93%	46.93%
Co-op, New Street, Ledbury	769	9332	£7.18	£3.01	£3.01	£3.26	£3.06	£3.07	£3.07	£3.07	£3.07	£0.43	£0.41	£2.83	£2.66	13.32%	13.32%
Tesco, Orchard Lane, Ledbury	903	11940	£10.78	£12.89	£12.89	£13.97	£13.10	£13.13	£13.13	£13.13	£13.13	£3.03	£2.85	£10.94	£10.28	21.69%	21.69%
CATCHMENT TOTALS	3916		£35.79	£28.46	£28.46	£30.85	£28.94	£28.98	£28.98	£28.98	£28.98	£9.21	£8.66	£21.64	£20.32		

LOCATIONS OUTSIDE THE CATCHMENT (4)	Net Sales Area - Convenience (Sq.m) (2)	Benchmark Turnover Figure (£/per Sq.m) (3)	Benchmark Turnover in 2018 (£m)	HS Turnover in 2018 (£m)	HS Turnover in 2019 (£m)	HS Turnover in 2020 (£m)	HS Turnover in 2021 (£m)	HS Turnover in 2022 (£m)	HS Turnover in 2023 (£m)	HS Turnover in 2024 (£m)	HS Turnover in 2025 (£m)	Proposed Store Trade Diversion 2020 (£m)	Proposed Store Trade Diversion 2025 (£m)	Post Diversion Turnover 2020 (£m)	Post Diversion Turnover 2025 (£m)
Zone 1A															
Aldi, Elgin Street, Hereford				£0.11	£0.11	£0.12	£0.11	£0.11	£0.11	£0.11	£0.11	£0.12	£0.11	£0.00	£0.00
Asda, Belmont Road, Hereford				£0.19	£0.19	£0.21	£0.19	£0.19	£0.19	£0.19	£0.19	£0.12	£0.11	£0.09	£0.08
Co-op, College Road, Hereford				£0.19	£0.19	£0.20	£0.19	£0.19	£0.19	£0.19	£0.19	£0.00	£0.00	£0.20	£0.19
Lidl, Brook Retail Park, Commercial Road, Hereford				£0.06	£0.06	£0.06	£0.06	£0.06	£0.06	£0.06	£0.06	£0.00	£0.00	£0.06	£0.06
Marks & Spencer, High Town, Hereford				£0.05	£0.05	£0.05	£0.05	£0.05	£0.05	£0.05	£0.05	£0.03	£0.03	£0.02	£0.02
Morrisons, Station Approach, Hereford				£0.32	£0.32	£0.35	£0.33	£0.33	£0.33	£0.33	£0.33	£0.26	£0.25	£0.09	£0.08
Sainsbury's Superstore, Barton Yard, Hereford				£0.27	£0.27	£0.29	£0.28	£0.28	£0.28	£0.28	£0.28	£0.17	£0.16	£0.12	£0.11
Tesco Superstore, Bewell Street, Hereford				£0.06	£0.06	£0.06	£0.06	£0.06	£0.06	£0.06	£0.06	£0.06	£0.05	£0.00	£0.00
Waitrose, Auctioneers Walk, The Old Market, Edgar Street, Hereford				£0.49	£0.49	£0.53	£0.50	£0.50	£0.50	£0.50	£0.50	£0.23	£0.22	£0.30	£0.28
ZONE 1A TOTAL				£1.73	£1.73	£1.88	£1.76	£1.76	£1.76	£1.76	£1.76	£0.98	£0.93	£0.89	£0.84
Zone 6															
Aldi, Brookend Street, Ross-on-Wye				£0.10	£0.10	£0.11	£0.11	£0.11	£0.11	£0.11	£0.11	£0.06	£0.05	£0.05	£0.05
Morrisons, Station Street, Ross-on-Wye				£0.36	£0.36	£0.39	£0.36	£0.36	£0.36	£0.36	£0.36	£0.17	£0.16	£0.21	£0.20
Sainsbury's Superstore, The Maltings, Ross-on-Wye				£0.06	£0.06	£0.07	£0.06	£0.06	£0.06	£0.06	£0.06	£0.00	£0.00	£0.07	£0.06
Gorsley Community Shop & Post Office, Gorsley, Ross-on-Wye				£0.05	£0.05	£0.06	£0.05	£0.05	£0.05	£0.05	£0.05	£0.00	£0.00	£0.06	£0.05
ZONE 6 TOTAL				£0.57	£0.57	£0.62	£0.58	£0.58	£0.58	£0.58	£0.58	£0.23	£0.22	£0.39	£0.37
LOCATIONS FROM OUTSIDE THE CATCHMENT TOTALS				£2.30	£2.30	£2.50	£2.34	£2.35	£2.35	£2.35	£2.35	£1.22	£1.14	£1.28	£1.20

COMMITMENTS / PLANNED INVESTMENT (6)															
Within Catchment Area															
None identified				-	-	-	-	-	-	-	-	-	-	-	-

INFLow EXPENDITURE (5)	£1.16	£1.09
Proposed Store Turnover (%) (£m)	£11.59	£10.89

Assumptions Regarding Convenience Sales

	2018	2019	2020	2021	2022	2023	2024	2025
Convenience Growth Rate (%)			8.4%	-6.2%	0.2%	0.0%	0.0%	0.0%

Notes

- (1) Locations based on Local Plan Proposals Map for Ledbury Town Centre.
- (3) Mintel Rankings 2020. Other stores turnover estimated by Rapleys.
- (4) Locations and Turnovers based on Zone 5 trade draw patterns from Household Survey 2018.
- (5) Assumed Turnover from other locations outside the Catchment Area.
- (6) Commitments / Planned Investment with Retail Study Zone 1a and Zone 6.

Table 7A - Household Survey Results - Total Convenience Goods Flows of Expenditure 2018

Zone	Facility	Zone 1A - Hereford (City)	Zone 1B - Hereford (Rural)	Zone 2 - Kingston	Zone 3 - Leominster	Zone 4 - Bromyard	Zone 5 - Ledbury	Zone 6 - Ross-on-Wye	Total Flow of Expenditure From Catchment (£)	% Inflow	Inflow from Beyond Catchment (£)	Total Flow of Expenditure Inc. Inflow (£)
		Flow of Expenditure (£)	Flow of Expenditure (£)	Flow of Expenditure (£)	Flow of Expenditure (£)	Flow of Expenditure (£)	Flow of Expenditure (£)	Flow of Expenditure (£)				
Zone 1A - Hereford (City)	Aldi, Eign Street, Hereford	£30,067,113	£9,588,981	£239,408	£0	£808,619	£108,071	£0	£28,812,752	10.00	£2,881,275.16	£31,694,027
	Asda, Belmont Road, Hereford	£17,383,326	£4,605,252	£73,948	£427,870	£713,872	£39,381	£516,780	£23,910,738	10.00	£2,391,072.88	£26,301,801
	Brampton Stores, Brampton Road, Hereford	£0	£0	£0	£0	£0	£0	£0	£0	0.00	£0	£0
	Central Stores, Church Road, Hereford	£0	£0	£0	£0	£0	£0	£0	£0	0.00	£0	£0
	Co-op, College Road, Hereford	£1,289,437	£1,246,385	£0	£0	£41,809	£389,912	£0	£2,776,582	0.00	£0	£2,776,582
	Co-op, Grandstand Road, Hereford	£4,650,736	£1,250,308	£0	£188,571	£0	£0	£0	£6,069,616	0.00	£0	£6,069,616
	Co-op, Holme Lacy Road, Hereford	£1,479,198	£903,764	£0	£0	£99,288	£0	£0	£2,482,250	0.00	£0	£2,482,250
	Co-op, Holmer Road, Widemansh, Hereford	£384,261	£760,352	£0	£0	£0	£0	£0	£484,634	0.00	£0	£484,634
	Co-op, Ledbury Road, Tuxley, Hereford	£2,177,007	£593,988	£0	£0	£0	£0	£0	£2,759,995	0.00	£0	£2,759,995
	Co-op, Whitecross Road, Hereford	£2,963,346	£1,019,022	£0	£0	£0	£0	£0	£4,002,367	0.00	£0	£4,002,367
	Farmfoods, Belmont Road, Hereford	£1,079,683	£175,803	£0	£0	£0	£0	£0	£1,255,486	0.00	£0	£1,255,486
	Fodder Health Food Shop, Church Street, Hereford	£88,095	£0	£0	£0	£0	£0	£0	£88,095	0.00	£0	£88,095
	Heggies of Hereford, Yazor Road, Hereford	£0	£0	£0	£0	£0	£0	£0	£0	0.00	£0	£0
	Iceland, Eign Gate, Hereford	£151,259	£902,096	£0	£0	£0	£0	£0	£1,053,355	10.00	£105,335.46	£1,198,690
	Lidl, Brook Retail Park, Commercial Road, Hereford	£6,648,317	£3,867,485	£0	£0	£654,277	£57,175	£535,752	£11,769,006	10.00	£1,176,300.58	£12,939,306
	Marks & Spencer, High Town, Hereford	£3,465,557	£2,326,069	£0	£0	£0	£47,519	£55,256	£5,887,402	10.00	£588,740.19	£6,476,142
	McColl's, The Oval, Hereford	£289,273	£0	£0	£0	£0	£0	£0	£289,273	0.00	£0	£289,273
	Marsons, Station Approach, Hereford	£35,855,809	£12,907,825	£31,488	£357,431	£1,050,356	£321,736	£586,014	£39,210,769	10.00	£3,121,076.91	£43,331,846
	Premier (Stokes Stones), Horwethy Road, Hereford	£38,7724	£0	£0	£0	£0	£0	£0	£38,7724	0.00	£0	£38,7724
	Premier, Catterell Street, Hereford	£0	£0	£0	£0	£0	£0	£0	£0	0.00	£0	£0
	Sainsbury's Superstore, Barton Yard, Hereford	£16,816,984	£9,531,156	£480,703	£1,085,150	£486,092	£271,558	£404,093	£29,085,796	10.00	£2,905,573.59	£33,994,309
	Tesco Express, Buckingham Inn, Whitecross Road, Hereford	£1,373,903	£540,169	£0	£0	£0	£0	£0	£1,914,071	0.00	£0	£1,914,071
	Tesco Express, Holme Lacy Road, Hereford	£4,481,600	£2,188,784	£0	£0	£311,492	£0	£0	£7,161,876	0.00	£0	£7,161,876
	Tesco Superstore, Abbotsway Road, Belmont, Hereford	£11,802,427	£11,469,329	£179,288	£0	£165,489	£268,469	£0	£23,363,449.26	10.00	£2,363,449.26	£26,000,065
	Tesco Superstore, Beval Street, Hereford	£10,338,572	£3,676,526	£0	£699,158	£447,081	£56,953	£123,319	£15,583,909	10.00	£1,536,190.79	£16,899,099
	Waitrose, Auctioneers Walk, The Old Market, Edgar Street, Hereford	£4,690,462	£5,799,669	£204,838	£1,001,013	£104,763	£483,369	£542,826	£12,832,738	10.00	£1,283,275.11	£14,116,006
	Home Bargains, Holmer Road Retail Park, Hereford	£653,106	£736,770	£0	£87,885	£0	£0	£0	£1,069,860	10.00	£106,886.04	£1,176,846
	Local shops, Hereford City Centre	£1,999,140	£1,477,516	£0	£0	£45,276	£0	£51,195	£3,573,126	10.00	£357,312.59	£3,930,439
	Tesco (Bso) Express, Ledbury Road, Hereford	£628,421	£101,598	£0	£0	£0	£0	£0	£730,029	0.00	£0	£730,029
	Total Zone 1A	£129,397,875	£7,525,656	£1,209,183	£3,817,178	£4,772,323	£1,790,294	£2,990,643	£219,618,689	£120	£1,681,978.1	£221,309,664
Zone 1B - Hereford (Rural)	Beaker Cash & Carry, Centurion Way, Hereford	£0	£0	£0	£100,699	£0	£0	£0	£100,699	0.00	£0	£100,699
	Canon Ryan Post Office & Stores, Canon Ryan, Hereford	£0	£22,889	£0	£0	£0	£0	£196,812	£419,701	0.00	£0	£419,701
	Convenience, The Old School Shop, Portland Street, Wootley, Hereford	£77,294	£1,101,195	£0	£0	£0	£0	£1,276,688	£1,374,689	0.00	£0	£1,374,689
	Lands, St Mary's Close, Madley, Hereford	£0	£864,187	£0	£0	£0	£0	£864,187	£864,187	0.00	£0	£864,187
	One Stop, Meadow Drive, Credenhill, Hereford	£0	£186,472	£0	£0	£0	£0	£186,472	£186,472	0.00	£0	£186,472
	Total Zone 1B	£77,294	£2,572,843	£0	£100,699	£0	£0	£1,968,112	£2,943,748	£0	£0	£2,943,748
Zone 2 - Kingston	Co-op, Crabtree Road, Kingston	£0	£1,405,732	£4,936,748	£633,795	£0	£0	£0	£6,976,276	15.00	£1,046,441.43	£8,022,718
	Jones Butchers, High Street, Kingston	£0	£0	£31,498	£0	£0	£0	£0	£31,498	0.00	£0	£31,498
	Lomas Service Station, Headbrook, Kingston	£0	£0	£0	£0	£0	£0	£0	£0	0.00	£0	£0
	New Local, High Street, Kingston	£0	£136,129	£1,600,946	£0	£0	£0	£1,736,073	£1,736,073	0.00	£0	£1,736,073
	Spar, Church Street, Kingston	£0	£0	£174,596	£0	£0	£0	£174,595	£174,595	0.00	£0	£174,595
	The Grapevine Fishmonger, High Street, Kingston	£0	£0	£382,763	£0	£0	£0	£382,763	£382,763	0.00	£0	£382,763
	Local shops, Kingston Town Centre	£0	£636,963	£500,917	£0	£0	£0	£1,139,880	£1,139,880	0.00	£0	£1,139,880
	Total Zone 2	£0	£2,180,824	£7,027,016	£633,795	£0	£0	£0	£10,441,635	£15	£1,046,441	£11,488,077
	Aldi, Dishley Street, Leominster	£0	£3,265,863	£997,441	£15,352,359	£1,744,027	£0	£55,256	£21,514,747	10.00	£2,153,474.66	£23,666,221
	Bright's Butcher, High Street, Leominster	£0	£133,898	£0	£276,670	£0	£0	£0	£410,568	0.00	£0	£410,568
Zone 3 - Leominster	Central Bakery, West Street, Leominster	£0	£0	£0	£0	£0	£0	£0	£0	0.00	£0	£0
	Co-op, Dishley Street, Leominster	£0	£272,288	£0	£5,489,532	£0	£0	£0	£5,761,790	0.00	£0	£5,761,790
	Marsons, Barons Cross Road, Leominster	£0	£45,90,980	£1,539,879	£17,933,316	£1,088,211	£0	£0	£25,122,386	15.00	£3,746,257.88	£28,869,744
	Organic & Wholefoods, West Street, Leominster	£0	£0	£0	£0	£0	£0	£0	£0	0.00	£0	£0
	Parry's Fruit & Veg, High Street, Leominster	£0	£0	£0	£276,670	£0	£0	£0	£276,670	0.00	£0	£276,670
	Spar, Bargate, Leominster	£92,796	£0	£0	£164,142	£0	£0	£0	£256,938	0.00	£0	£256,938
	Local shops, Leominster Town Centre	£0	£423,915	£0	£645,406	£0	£0	£0	£1,069,322	0.00	£0	£1,069,322
	Total Zone 3	£92,796	£8,786,714	£2,537,320	£40,138,095	£2,802,238	£0	£55,256	£58,412,413	£25	£5,919,839	£60,332,252
	Co-op, High Street, Bromyard	£0	£0	£0	£196,127	£0	£0	£0	£196,127	20.00	£772,314.36	£4,633,886
	Co-op, Tenbury Road, Bromyard	£122,270	£625,314	£0	£100,699	£0	£0	£0	£2,723,126	20.00	£746,925.17	£4,474,951
Zone 4 - Bromyard	Lamings Bakery, High Street, Bromyard	£0	£0	£0	£0	£0	£0	£0	£452,275	0.00	£0	£452,275
	Legg's of Bromyard Butcher, Tenbury Road, Bromyard	£0	£0	£0	£87,985	£0	£0	£0	£484,343	0.00	£0	£484,343
	McColl's, Hatton Park, Bromyard	£0	£0	£0	£108,142	£0	£0	£0	£108,142	0.00	£0	£108,142
	Total Zone 4	£122,270	£625,314	£0	£100,699	£0	£0	£0	£872,845	£40	£1,518,140	£5,746,597
Zone 5 - Ledbury	Aldi, Leadon Way, Ledbury	£189,522	£1,231,711	£0	£250,670	£242,886	£7,794,899	£243,062	£10,062,880	10.00	£1,006,284.98	£11,069,136
	Co-op, New Street, Ledbury	£0	£0	£0	£0	£0	£2,735,368	£0	£2,735,368	10.00	£273,536.81	£3,008,905
	Jenkins Greengrocers, The Homend, Ledbury	£0	£75,955	£0	£0	£0	£158,663	£0	£234,618	0.00	£0	£234,618
	One Stop, The Homend, Ledbury	£0	£0	£0	£0	£0	£226,357	£0	£226,357	0.00	£0	£226,357
	Spar, A417 Parkway, Ledbury	£0	£0	£0	£0	£0	£237,076	£0	£237,076	0.00	£0	£237,076
	Tesco Superstore, Orchard Lane, Ledbury	£941,116	£975,981	£31,498	£106,762	£240,785	£6,462,602	£46,158	£11,204,608	15.00	£1,680,890.15	£12,885,291
	Local shops, Ledbury Town Centre	£0	£0	£0	£0	£0	£0	£0	£0	15.00	£92,414.75	£708,913
	Total Zone 5	£980,638	£2,283,347	£31,498	£357,431	£489,770	£23,330,864	£98,220	£25,406,769	£90	£3,052,927	£28,459,696
Zone 6 - Ross-on-Wye	Aldi, Brookland Street, Ross-on-Wye	£151,259	£625,314	£0	£141,808	£0	£103,821	£10,441,549	£11,469,758	10.00	£1,146,375.13	£12,616,102
	Brampton Stores, Springfield Road, Ross-on-Wye	£0	£0	£0	£0	£0	£0	£0	£0	0.00	£0	£0
	Co-op, Overrass Street, Ross-on-Wye	£0	£270,027	£0	£0	£62,955	£0	£933,887	£1,266,869	10.00	£126,686.91	£1,393,556
	Field Fays The Organic Store, Broad Street, Ross-on-Wye	£0	£0	£0	£0	£0	£72,885	£0	£72,885	0.00	£0	£72,885
	Marsons, Station Street, Ross-on-Wye	£203,493	£1,460,727	£0	£0	£0	£35,613	£21,412,219	£23,472,022	15.00	£3,512,853.23	£27,000,875
	One Stop, Gloucester Road, Ross-on-Wye	£0	£0	£0	£0	£0	£628,051	£0	£628,051	0.00	£0	£628,051
	Sainsbury's Superstore, The Maltings, Ross-on-Wye	£195,743	£119,988	£0	£0	£0	£40,951	£6,789,288	£7,165,990	10.00	£716,595.02	£7,882,545
	Spar, Broad Street, Ross-on-Wye	£0	£0	£0	£0	£0	£0	£608,470	£608,470	0.00	£0	£608,470
	Local shops, Ross-on-Wye Town Centre	£0	£0	£0	£0	£0	£0	£774,392	£774,392	15.00	£116,198.75	£890,580
	Gonsley Community Shop & Post Office, Gonsley, Ross-on-Wye	£0	£0	£0	£0	£0	£50,855	£97,352	£148,207	0.00	£0	£148,207
Zone 6 - Ross-on-Wye	Total Zone 6	£980,445	£2,496,057	£0	£0	£20						

Table 7B - Household Survey Main Food Shopping Market Share and Flows of Expenditure 2018 (First Choice)

Zone	Facility	Zone 1A - Hereford (City)		Zone 1B - Hereford (Rural)		Zone 2 - Kingston		Zone 3 - Leominster		Zone 4 - Bromyard		Zone 5 - Ledbury		Zone 6 - Ross-on-Wye		Total Flow of Expenditure From Catchment (£)
		Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	
Zone 1A - Hereford (City)	Aldi, Eign Street, Hereford	18.82%	£12,484,185	11.60%	£6,361,449	2.73%	£170,171	0.00%	£0	7.30%	£632,667	0.00%	£0	0.00%	£0	£19,648,472
	Asda, Belmont Road, Hereford	14.40%	£9,554,535	3.08%	£1,690,865	1.18%	£73,448	0.69%	£168,571	5.58%	£483,692	0.00%	£0	0.67%	£173,799	£12,144,909
	Brampton Stores, Brampton Road, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Central Stores, Church Road, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Co-op, College Road, Hereford	0.23%	£151,259	0.25%	£137,660	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£288,920
	Co-op, Grandstand Road, Hereford	25.2%	£1,673,138	0.90%	£492,506	0.00%	£0	0.69%	£168,571	0.00%	£0	0.00%	£0	0.00%	£0	£2,334,215
	Co-op, Holme Lacy Road, Hereford	0.19%	£126,049	0.25%	£137,660	0.00%	£0	0.00%	£0	1.15%	£99,288	0.00%	£0	0.00%	£0	£362,997
	Co-op, Holmer Road, Widemarsh, Hereford	0.00%	£0	0.40%	£217,185	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£217,185
	Co-op, Ledbury Road, Tupsley, Hereford	0.19%	£126,049	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£126,049
	Co-op, Whitcross Road, Hereford	0.49%	£325,074	0.99%	£511,154	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£836,228
	Farmfoods, Belmont Road, Hereford	0.30%	£199,025	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£199,025
	Fodder Health Food Shop, Church Street, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Heggies of Hereford, Yazor Road, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Iceland, Eign Gate, Hereford	0.23%	£151,259	0.99%	£511,154	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£662,413
	Lidl, Brook Retail Park, Commercial Road, Hereford	4.90%	£3,248,754	3.05%	£1,672,218	0.00%	£0	0.00%	£0	5.58%	£483,692	0.00%	£0	0.00%	£0	£5,404,664
	Marks & Spencer, High Town, Hereford	0.68%	£451,124	1.69%	£924,135	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£1,375,259
	McCol's, The Oval, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Morrisons, Station Approach, Hereford	14.56%	£9,662,008	14.44%	£8,031,473	0.00%	£0	0.44%	£106,762	6.47%	£560,607	2.35%	£321,736	1.24%	£323,067	£19,005,653
	Premier (Stokes Stores), Hoanwilly Road, Hereford	0.19%	£126,049	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£126,049
	Premier, Cottrell Street, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Sainsbury's Superstore, Barton Yard, Hereford	16.86%	£11,187,204	9.86%	£5,406,052	4.69%	£292,605	1.13%	£275,577	4.00%	£346,510	0.00%	£0	0.86%	£224,425	£17,732,373
	Tesco Express, Buckingham Inn, Whitcross Road, Hereford	0.23%	£151,259	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£151,259
	Tesco Express, Holme Lacy Road, Hereford	1.36%	£880,980	1.61%	£880,259	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£1,779,189
	Tesco Superstore, Abbotsway Road, Belmont, Hereford	9.81%	£6,509,450	13.32%	£7,306,425	1.55%	£96,786	0.00%	£0	0.00%	£0	0.00%	£0	0.40%	£104,128	£14,016,783
	Tesco Superstore, Bevell Street, Hereford	7.60%	£5,039,980	3.70%	£2,030,355	0.00%	£0	1.72%	£419,961	1.45%	£125,796	0.00%	£0	0.33%	£87,160	£7,703,192
	Waitrose, Auctioners Walk, The Old Market, Edgar Street, Hereford	25.3%	£1,675,792	3.72%	£2,040,775	0.00%	£0	1.62%	£396,752	0.73%	£62,955	0.63%	£86,563	0.80%	£208,506	£4,471,343
	Home Bargains, Holmer Road Retail Park, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Local shops, Hereford City Centre	0.75%	£495,573	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£495,573
	Tesco (Esso) Express, Ledbury Road, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Total Zone 1A	96.83%	£64,236,698	69.93%	£38,351,327	10.14%	£633,010	6.29%	£1,536,194	32.23%	£2,795,146	2.98%	£408,299	4.30%	£1,121,080	£109,081,753
Zone 1B - Hereford (Rural)	Booker Cash & Carry, Centurion Way, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Canon Pyon Post Office & Stores, Canon Pyon, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.53%	£137,525	£137,525
	Costcutter, The Old School Shop, Portland Street, Vleobley, Hereford	0.00%	£0	0.25%	£137,660	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£137,660
	Londis, St Mary's Close, Madley, Hereford	0.00%	£0	0.25%	£137,660	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£137,660
	One Stop, Meadow Drive, Credehill, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Total Zone 1B	0.00%	£0	0.50%	£275,321	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.53%	£137,525	£412,846
Zone 2 - Kingston	Co-op, Crabtree Road, Kingston	0.00%	£0	0.50%	£275,321	38.71%	£2,415,284	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£2,690,605
	Jones Butchers, High Street, Kingston	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Lomas Service Station, Headbrook, Kingston	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Nisa Local, High Street, Kingston	0.00%	£0	0.00%	£0	3.98%	£244,992	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£244,992
	Spar, Church Street, Kingston	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	The Grapevine Fishmonger, High Street, Kingston	0.00%	£0	0.00%	£0	5.61%	£350,015	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£350,015
	Local shops, Kingston Town Centre	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Total Zone 2	0.00%	£0	0.50%	£275,321	48.24%	£3,010,291	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£3,285,612
Zone 3 - Leominster	Aldi, Dishley Street, Leominster	0.00%	£0	3.78%	£2,071,488	11.86%	£740,242	37.00%	£9,089,063	16.55%	£1,487,895	0.00%	£0	0.00%	£0	£13,288,788
	Bright's Butcher, High Street, Leominster	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Central Bakery, West Street, Leominster	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Co-op, Dishley Street, Leominster	0.00%	£0	0.00%	£0	0.00%	£0	5.72%	£1,398,161	0.00%	£0	0.00%	£0	0.00%	£0	£1,398,161
	Morrisons, Barons Cross Road, Leominster	0.00%	£0	5.52%	£3,025,788	16.79%	£1,047,549	45.03%	£11,001,814	5.48%	£475,107	0.00%	£0	0.00%	£0	£15,550,258
	Organic & Wholefoods, West Street, Leominster	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Parry's Fruit & Veg, High Street, Leominster	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Spar, Bargates, Leominster	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Local shops, Leominster Town Centre	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Total Zone 3	0.00%	£0	9.80%	£5,172,597	28.65%	£1,787,891	87.76%	£21,435,839	22.06%	£1,913,002	0.00%	£0	0.00%	£0	£26,512,528
Zone 4 - Bromyard	Co-op, High Street, Bromyard	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	14.15%	£1,226,833	0.00%	£0	0.00%	£0	£1,226,833
	Co-op, Tenbury Road, Bromyard	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	20.71%	£1,796,025	0.00%	£0	0.00%	£0	£1,796,025
	Laming's Bakery, High Street, Bromyard	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Leggess of Bromyard Butcher, Tenbury Road, Bromyard	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	1.15%	£99,288	0.00%	£0	0.00%	£0	£99,288
	McCol's, Hatton Park, Bromyard	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Total Zone 4	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	36.81%	£3,122,145	0.00%	£0	0.00%	£0	£3,122,145
Zone 5 - Ledbury	Aldi, Leaddon Way, Ledbury	0.19%	£126,049	1.29%	£705,853	0.00%	£0	0.00%	£0	2.32%	£201,177	32.66%	£4,472,797	0.93%	£241,648	£5,747,524
	Co-op, New Street, Ledbury	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	5.82%	£796,601	0.00%	£0	£796,601
	Jenkins Greengrocers, The Homend, Ledbury	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£			

Table 7C - Household Survey Main Food Shopping Market Share and Flows of Expenditure 2018 (Second Choice)

Zone	Facility	Zone 1A - Hereford (City)		Zone 1B - Hereford (Rural)		Zone 2 - Kingston		Zone 3 - Leominster		Zone 4 - Bromyard		Zone 5 - Ledbury		Zone 6 - Ross-on-Wye		Total Flow of Expenditure From Catchment (£)
		Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	
Zone 1A - Hereford (City)	Aldi, Eign Street, Hereford	9.53%	£2,710,172	11.13%	£2,616,436	2.59%	£69,237	0.00%	£0	2.69%	£100,108	0.00%	£0	0.00%	£0	£5,495,953
	Asda, Belmont Road, Hereford	14.84%	£4,220,236	8.07%	£1,897,534	0.00%	£0	1.69%	£177,173	6.19%	£230,180	2.25%	£132,006	2.60%	£290,309	£6,947,438
	Brampton Stores, Brampton Road, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Central Stores, Church Road, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Co-op, College Road, Hereford	0.52%	£146,945	1.20%	£282,264	0.00%	£0	0.00%	£0	1.13%	£41,809	0.00%	£0	0.00%	£0	£474,018
	Co-op, Grandstand Road, Hereford	1.29%	£365,647	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£365,647
	Co-op, Holme Lacy Road, Hereford	0.31%	£88,095	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£88,095
	Co-op, Holmer Road, Widemarsh, Hereford	0.00%	£0	0.32%	£75,955	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£75,955
	Co-op, Ledbury Road, Tuppasay, Hereford	1.07%	£305,623	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£305,623
	Co-op, Whitescross Road, Hereford	2.59%	£735,445	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£735,445
	Farmfoods, Belmont Road, Hereford	1.33%	£376,839	0.39%	£91,043	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£467,882
	Fodder Health Food Shop, Church Street, Hereford	0.31%	£88,095	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£88,095
	Heggies of Hereford, Yazor Road, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Iceland, Eign Gate, Hereford	0.00%	£0	0.32%	£75,955	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£75,955
	Lidl, Brook Retail Park, Commercial Road, Hereford	6.67%	£1,897,644	5.46%	£1,284,046	0.00%	£0	0.00%	£0	3.37%	£125,310	0.00%	£0	4.24%	£474,465	£3,781,465
	Marks & Spencer, High Town, Hereford	5.55%	£1,577,399	2.49%	£686,186	0.00%	£0	0.00%	£0	0.81%	£47,519	0.49%	£55,256			£2,266,360
	McCol's, The Oval, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Morrisons, Station Approach, Hereford	11.65%	£3,311,309	7.00%	£1,855,759	1.18%	£31,498	2.39%	£250,670	11.14%	£413,905	0.00%	£0	0.65%	£72,885	£5,936,028
	Premier (Stokes Stores), Hoanwilly Road, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Premier, Cottrell Street, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Sainsbury's Superstore, Barton Yard, Hereford	11.65%	£3,313,746	14.26%	£3,951,555	7.09%	£188,099	3.48%	£364,405	4.03%	£149,582	4.63%	£271,558	0.41%	£46,158	£7,686,103
	Tesco Express, Buckingham Inn, Whitescross Road, Hereford	0.52%	£146,945	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£146,945
	Tesco Express, Holme Lacy Road, Hereford	4.99%	£1,419,532	1.39%	£373,410	0.00%	£0	4.42%	£1,245,000	0.00%	£0	0.00%	£0	0.00%	£0	£1,955,157
	Tesco Superstore, Abbotsway Road, Belmont, Hereford	7.26%	£2,063,453	9.12%	£2,149,053	1.86%	£49,724	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£4,255,230
	Tesco Superstore, Bevell Street, Hereford	9.65%	£2,744,020	3.19%	£750,310	0.00%	£0	0.00%	£0	8.65%	£321,346	0.97%	£56,953	0.41%	£46,158	£3,916,786
	Waitrose, Auctioneers Walk, The Old Market, Edgar Street, Hereford	6.84%	£1,945,121	10.71%	£2,516,874	7.66%	£204,838	2.56%	£267,710	1.13%	£41,809	4.52%	£265,129	1.97%	£220,362	£5,461,843
	Home Bargains, Holmer Road Retail Park, Hereford	0.52%	£146,945	0.39%	£91,043	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£237,988
	Local shops, Hereford City Centre	0.26%	£73,472	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£73,472
	Tesco (Esso) Express, Ledbury Road, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Total Zone 1A	97.34%	£27,676,683	76.54%	£17,991,423	26.32%	£543,396	10.12%	£1,059,958	42.74%	£1,586,264	13.17%	£773,165	10.76%	£1,265,593	£50,838,481
Zone 1B - Hereford (Rural)	Booker Cash & Carry, Centurion Way, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.96%	£100,699	0.00%	£0	0.00%	£0	0.00%	£0	£100,699
	Canon Pyon Post Office & Stores, Canon Pyon, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Costcutter, The Old School Shop, Portland Street, Vleobley, Hereford	0.00%	£0	0.32%	£75,955	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£75,955
	Londis, St Mary's Close, Madley, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	One Stop, Meadow Drive, Credenhill, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Total Zone 1B	0.00%	£0	0.32%	£75,955	0.00%	£0	0.96%	£100,699	0.00%	£0	0.00%	£0	0.00%	£0	£176,654
Zone 2 - Kingston	Co-op, Crabtree Road, Kingston	0.00%	£0	0.32%	£75,955	22.44%	£600,053	0.96%	£100,699	0.00%	£0	0.00%	£0	0.00%	£0	£776,707
	Jones Butchers, High Street, Kingston	0.00%	£0	0.00%	£0	1.18%	£31,498	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£31,498
	Lomas Service Station, Headbrook, Kingston	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Nisa Local, High Street, Kingston	0.00%	£0	0.00%	£0	21.19%	£566,772	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£566,772
	Spar, Church Street, Kingston	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	The Grapevine Fishmonger, High Street, Kingston	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Local shops, Kingston Town Centre	0.00%	£0	0.00%	£0	4.44%	£118,862	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£118,862
	Total Zone 2	0.00%	£0	0.32%	£75,955	26.25%	£1,317,186	0.96%	£100,699	0.00%	£0	0.00%	£0	0.00%	£0	£1,493,839
Zone 3 - Leominster	Aldi, Dishley Street, Leominster	0.00%	£0	3.21%	£755,031	8.39%	£224,251	25.25%	£2,643,838	8.24%	£306,132	0.00%	£0	0.49%	£55,256	£3,984,610
	Bright's Butcher, High Street, Leominster	0.00%	£0	0.00%	£0	0.00%	£0	0.96%	£100,699	0.00%	£0	0.00%	£0	0.00%	£0	£100,699
	Central Bakery, West Street, Leominster	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Co-op, Dishley Street, Leominster	0.00%	£0	0.00%	£0	0.00%	£0	15.21%	£1,592,606	0.00%	£0	0.00%	£0	0.00%	£0	£1,592,606
	Morrisons, Barons Cross Road, Leominster	0.00%	£0	3.80%	£893,187	13.31%	£955,991	35.79%	£3,747,525	12.43%	£461,985	0.00%	£0	0.00%	£0	£5,458,688
	Organic & Wholefoods, West Street, Leominster	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Perry's Fruit & Veg, High Street, Leominster	0.00%	£0	0.00%	£0	0.00%	£0	0.96%	£100,699	0.00%	£0	0.00%	£0	0.00%	£0	£100,699
	Spar, Bargates, Leominster	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Local shops, Leominster Town Centre	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Total Zone 3	0.00%	£0	7.01%	£1,640,218	21.70%	£580,342	26.19%	£8,185,367	20.67%	£768,118	0.00%	£0	0.49%	£55,256	£11,237,301
Zone 4 - Bromyard	Co-op, High Street, Bromyard	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	11.22%	£416,809	0.00%	£0	0.00%	£0	£416,809
	Co-op, Tenbury Road, Bromyard	0.00%	£0	0.00%	£0	0.00%	£0	0.96%	£100,699	6.43%	£238,774	0.00%	£0	0.00%	£0	£339,473
	Laming's Bakery, High Street, Bromyard	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Leggess of Bromyard Butcher, Tenbury Road, Bromyard	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	2.69%	£100,108	0.00%	£0	0.00%	£0	£100,108
	McCol's, Hatton Park, Bromyard	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Total Zone 4	0.00%	£0	0.00%	£0	0.00%	£0	2.96%	£100,699	20.33%	£755,691	0.00%	£0	0.00%	£0	£856,390
Zone 5 - Ledbury	Aldi, Leaden Way, Ledbury	0.26%	£73,472	1.66%	£889,730	0.00%	£0	2.39%	£250,670	1.13%	£41,809	24.65%	£1,446,890	0.91%	£101,414	£2,303,984
	Co-op, New Street, Ledbury	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	13.76%	£808,735	0.00%	£0	£808,735
	Jenkins Greengrocers, The Homend, Ledbury	0.00%	£0	0.32%	£75,955	0.00%	£0	0.00%	£0	0.00%	£0	0.97%	£56,953	0.00%	£0	£132,908
	One Stop, The Homend, Ledbury	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Spar, A417, Parkway, Ledbury	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.81%	£47,519	0.00%	£0	£47,519
	Tesco Superstore, Orchard Lane, Ledbury	0.00%	£0	0.00%	£0	1.18%	£31,498	0.00%	£0	0.00%	£0	30.76%	£1,805,659	0.41%	£46,158	£1,883,315
	Local shops, Ledbury Town Centre	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	2.90%	£170,091	0.00%	£0	£170,091
	Total Zone 5	0.26%	£73,472	1.98%	£465,685	1.18%	£31,498	2.39%	£250,670	1.13%	£41,809	73.16%	£4,335,847	1.32%	£147,571	£5,346,552
Zone 6 - Ross-on-Wye	Aldi, Brookend Street, Ross-on-Wye	0.00%	£0	1.16%	£277,000	0.00%	£0	0.00%	£0	1.78%	£65,965	0.00%	£0	27.60%	£3,086,869	£3,424,834

Table 7E - Household Survey - Top Up Food Shopping Market Share and Flows of Expenditure 2018 (Second Choice)

Zone	Facility	Zone 1A - Hereford (City)		Zone 1B - Hereford (Rural)		Zone 2 - Kingston		Zone 3 - Leominster		Zone 4 - Bromyard		Zone 5 - Ledbury		Zone 6 - Ross-on-Wye		Total Flow of Expenditure From Catchment (£)
		Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	
Zone 1A - Hereford (City)	Aldi, Eign Street, Hereford	7.02%	£895,103	4.06%	£408,387	0.00%	£0	0.00%	£0	4.76%	£75,843	2.27%	£57,175	0.00%	£0	£1,396,508
	Asda, Belmont Road, Hereford	14.91%	£1,817,093	6.76%	£680,644	0.00%	£0	0.00%	£0	0.00%	£0	2.27%	£57,175	1.10%	£52,672	£2,607,585
	Brampton Stores, Brampton Road, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Central Stores, Church Road, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Co-op, College Road, Hereford	2.63%	£320,664	4.06%	£408,387	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£729,050
	Co-op, Grandstand Road, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£320,664
	Co-op, Holme Lacy Road, Hereford	1.75%	£213,776	1.35%	£136,129	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£349,905
	Co-op, Holmer Road, Widemarsh, Hereford	0.88%	£106,888	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£106,888
	Co-op, Ledbury Road, Tupsley, Hereford	3.51%	£427,551	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£427,551
	Co-op, Whitescross Road, Hereford	2.63%	£320,664	2.70%	£272,258	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£592,921
	Farmfoods, Belmont Road, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Fodder Health Food Shop, Church Street, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Heggies of Hereford, Yazor Road, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Iceland, Eign Gate, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Lidl, Brook Retail Park, Commercial Road, Hereford	7.02%	£895,103	4.06%	£408,387	0.00%	£0	0.00%	£0	0.00%	£0	2.27%	£57,175	0.00%	£0	£1,320,665
	Marks & Spencer, High Town, Hereford	2.63%	£320,664	5.41%	£544,515	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£865,179
	McColl's, The Oval, Hereford	1.75%	£213,776	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£213,776
	Morrisons, Station Approach, Hereford	7.89%	£961,991	9.46%	£952,902	0.00%	£0	0.00%	£0	4.76%	£75,843	0.00%	£0	0.00%	£0	£1,990,736
	Premier (Stokes Stores), Hoanwilly Road, Hereford	0.88%	£106,888	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£106,888
	Premier, Cottrell Street, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Sainsbury's Superstore, Barton Yard, Hereford	5.26%	£641,327	1.35%	£136,129	0.00%	£0	3.92%	£175,970	0.00%	£0	0.00%	£0	1.10%	£52,672	£1,006,098
	Tesco Express, Buckingham Inn, Whitescross Road, Hereford	3.51%	£427,551	2.70%	£272,258	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£699,809
	Tesco Express, Holme Lacy Road, Hereford	7.02%	£895,103	4.06%	£408,387	0.00%	£0	4.76%	£75,843	0.00%	£0	0.00%	£0	0.00%	£0	£1,338,333
	Tesco Superstore, Abbotsway Road, Belmont, Hereford	4.39%	£534,439	2.70%	£272,258	2.86%	£32,748	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£839,445
	Tesco Superstore, Beville Street, Hereford	6.14%	£748,215	2.70%	£272,258	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£1,020,473
	Waitrose, Auctioneers Walk, The Old Market, Edgar Street, Hereford	4.39%	£534,439	1.35%	£136,129	0.00%	£0	0.00%	£0	0.00%	£0	2.27%	£57,175	1.10%	£52,672	£780,415
	Home Bargains, Holmer Road Retail Park, Hereford	2.63%	£320,664	1.35%	£136,129	0.00%	£0	1.96%	£87,985	0.00%	£0	0.00%	£0	0.00%	£0	£544,778
	Local shops, Hereford City Centre	5.26%	£641,327	1.35%	£136,129	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£777,456
	Tesco (Esso) Express, Ledbury Road, Hereford	2.63%	£320,664	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£320,664
	Total Zone 1A	97.37%	£11,864,550	55.41%	£5,581,283	2.86%	£32,748	5.88%	£263,956	14.29%	£227,530	9.09%	£228,702	3.30%	£158,015	£18,356,784
Zone 1B - Hereford (Rural)	Booker Cash & Carry, Centurion Way, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Canon Pym Post Office & Stores, Canon Pym, Hereford	0.00%	£0	0.00%	£136,129	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£136,129
	Costcutter, The Old School Shop, Portland Street, Weobley, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Londis, St Mary's Close, Madley, Hereford	0.00%	£0	2.70%	£272,258	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£272,258
	One Stop, Meadow Drive, Credenhill, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Total Zone 1B	0.00%	£0	4.05%	£408,387	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£408,387
Zone 2 - Kingston	Co-op, Crabtree Road, Kingston	0.00%	£0	2.70%	£272,258	17.14%	£196,486	5.88%	£263,956	0.00%	£0	0.00%	£0	0.00%	£0	£732,699
	Jones Butchers, High Street, Kingston	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Lomas Service Station, Headbrook, Kingston	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Nisa Local, High Street, Kingston	0.00%	£0	1.35%	£136,129	42.86%	£491,214	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£627,343
	Spar, Church Street, Kingston	0.00%	£0	0.00%	£0	8.57%	£98,243	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£98,243
	The Grapevine Fishmonger, High Street, Kingston	0.00%	£0	2.86%	£32,748	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£32,748
	Local shops, Kingston Town Centre	0.00%	£0	1.35%	£136,129	14.29%	£163,738	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£299,867
	Total Zone 2	0.00%	£0	5.41%	£544,515	85.71%	£982,428	5.88%	£263,956	0.00%	£0	0.00%	£0	0.00%	£0	£1,796,899
Zone 3 - Leominster	Aldi, Dishley Street, Leominster	0.00%	£0	0.00%	£0	2.86%	£32,748	15.69%	£703,882	0.00%	£0	0.00%	£0	0.00%	£0	£736,629
	Bright's Butcher, High Street, Leominster	0.00%	£0	0.00%	£0	0.00%	£0	3.92%	£175,970	0.00%	£0	0.00%	£0	0.00%	£0	£175,970
	Central Bakery, West Street, Leominster	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Co-op, Dishley Street, Leominster	0.00%	£0	2.70%	£272,258	0.00%	£0	17.65%	£791,867	0.00%	£0	0.00%	£0	0.00%	£0	£1,064,125
	Morrisons, Barons Cross Road, Leominster	0.00%	£0	2.70%	£272,258	0.00%	£0	15.69%	£703,882	4.76%	£75,843	0.00%	£0	0.00%	£0	£1,051,983
	Organic & Wholefoods, West Street, Leominster	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Parry's Fruit & Veg, High Street, Leominster	0.00%	£0	0.00%	£0	0.00%	£0	3.92%	£175,970	0.00%	£0	0.00%	£0	0.00%	£0	£175,970
	Spar, Bargates, Leominster	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Local shops, Leominster Town Centre	0.00%	£0	0.00%	£0	0.00%	£0	9.80%	£439,926	0.00%	£0	0.00%	£0	0.00%	£0	£439,926
	Total Zone 3	0.00%	£0	5.41%	£544,515	2.86%	£32,748	66.67%	£2,991,497	4.76%	£75,843	0.00%	£0	0.00%	£0	£3,641,604
Zone 4 - Bromyard	Co-op, High Street, Bromyard	0.00%	£0	0.00%	£0	0.00%	£0	1.96%	£87,985	14.29%	£227,530	0.00%	£0	0.00%	£0	£315,515
	Co-op, Tenbury Road, Bromyard	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	28.57%	£455,060	0.00%	£0	0.00%	£0	£455,060
	Laming's Bakery, High Street, Bromyard	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Leggess of Bromyard Butcher, Tenbury Road, Bromyard	0.00%	£0	0.00%	£0	0.00%	£0	1.96%	£87,985	9.52%	£151,687	0.00%	£0	0.00%	£0	£239,672
	McColl's, Hatton Park, Bromyard	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	Total Zone 4	0.00%	£0	0.00%	£0	0.00%	£0	3.92%	£175,970	52.38%	£834,277	0.00%	£0	0.00%	£0	£1,010,247
Zone 5 - Ledbury	Aldi, Leaden Way, Ledbury	0.00%	£0	1.35%	£136,129	0.00%	£0	0.00%	£0	0.00%	£0	18.18%	£457,404	0.00%	£0	£593,533
	Co-op, New Street, Ledbury	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	9.09%	£228,702	0.00%	£0	£228,702
	Jenkins Greengrocers, The Homend, Ledbury	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	£0
	One Stop, The Homend, Ledbury	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	4.55%	£114,351			

Table 7F - Household Survey - Household Survey Main Food / Top-up Turnover percentage split (2018)

		Main-Food Turnover Ratio (%)	Top-up Turnover Ratio (%)
Zone 5 - Ledbury	Aldi, Leadon Way, Ledbury	80.0%	20.0%
	Co-op, New Street, Ledbury	58.7%	41.3%
	Jenkins Greengrocers, The Homend, Ledbury	56.6%	43.4%
	One Stop, The Homend, Ledbury	0.0%	100.0%
	Spar, A417, Parkway, Ledbury	14.5%	85.5%
	Tesco Superstore, Orchard Lane, Ledbury	70.1%	29.9%
	Local shops, Ledbury Town Centre	58.5%	41.5%
	Total Zone 5		

Notes

Turnover excludes inflow assumptions

Sourced from Tables 7B - 7E

Table 8 - Household Survey - Combined Comparison Market Shares and Flow of Expenditure 2018

1b

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Zone	Facility	Zone 1A - Hereford (City)		Zone 1B - Hereford (Rural)		Zone 2 - Kingston		Zone 3 - Leominster		Zone 4 - Bromley		Zone 5 - Ludbury		Zone 6 - Ross-on-Wye		Inflow beyond catchment	Total Flow of Expenditure (inc. inflow)	Total Flow of Expenditure from Catchment (inc. inflow)	
		Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)	Market Share (%)	Flow of Expenditure (£)				% Inflow
Zone 1A - Hereford (City)	Hereford City Centre	74.91%	£134,599,636	68.04%	£102,836,278	46.04%	£7,265,161	43.89%	£77,596,815	51.04%	£103,26,579	26.22%	£13,857,942	25.90%	£17,802,719	15%	£47,206,518	£361,916,846	£314,710,122
	Topical Local Centre	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£0	£0	£0
	Brook Retail Park, Commercial Road, Hereford	0.14%	£263,526	0.00%	£66,333	0.00%	£11,155	0.00%	£18,163	0.00%	£143,801	0.00%	£0	0.00%	£0	0%	£66,436	£66,436	£66,436
	Hereford Retail Park, Newtown Road, Hereford	6.78%	£12,179,317	6.14%	£6,366,407	4.83%	£70,200	3.75%	£2,588,515	3.36%	£69,1708	1.09%	£50,966	2.22%	£1,635,361	0%	£77,485,374	£77,485,374	£77,485,374
	Mayold Shopping Centre, Mayold Street, Hereford	0.31%	£56,402	0.14%	£47,667	0.40%	£90,988	0.35%	£75,859	1.77%	£93,859	0.00%	£0	0.00%	£0	0%	£2,185,576	£2,185,576	£2,185,576
	Old Market Shopping Centre, Newmarket Street, Hereford	1.55%	£2,776,504	3.22%	£4,871,708	1.59%	£2,534,742	0.75%	£473,365	0.42%	£86,425	1.39%	£13,533	0.12%	£88,814	0%	£9,246,568	£9,246,568	£9,246,568
	Spirit Retail Park, Holmer Road, Hereford	2.53%	£4,516,927	1.20%	£1,831,610	1.89%	£2,713,803	1.27%	£796,363	0.85%	£144,568	0.34%	£4,568	0.00%	£1,444,838	0%	£7,722,827	£7,722,827	£7,722,827
	Abul Ege Street, Hereford	0.05%	£90,405	0.17%	£255,311	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£9,457.16	£9,457.16	£9,457.16
	Asda, Belmont Road, Hereford	25.54%	£4,650,669	0.90%	£1,362,894	0.00%	£0	0.00%	£23,348	0.00%	£0	0.00%	£157,512	0.26%	£177,255	0%	£6,346,788	£6,346,788	£6,346,788
	1 Mart Warehouse, Widemarsh Street, Hereford	0.01%	£16,007	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£16,007	£16,007	£16,007
	Jewsons, Canal Wharf Canal Road, Hereford	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£0	£0	£0
	Morrison, Station Approach, Hereford	0.32%	£57,25.15	0.42%	£66,306	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£1,202,424	£1,202,424	£1,202,424
	Stinchbury's Superstore, Barton Yard, Hereford	2.47%	£4,433,478	0.77%	£1,163,788	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£5,597,266	£5,597,266	£5,597,266
	Screwfix, Mortimer Road, Hereford	0.00%	£60,488	0.00%	£7,4576	0.00%	£0	0.00%	£19,181	0.05%	£10,125	0.00%	£0	0.00%	£31,887	0%	£196,266	£196,266	£196,266
	Timco Superstore, Albion Road, Belmont, Hereford	1.73%	£3,101,962	2.02%	£3,036,028	0.80%	£118,385	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£46,226,274	£46,226,274	£46,226,274
	Timco Superstore, Bevell Street, Hereford	0.21%	£374,091	0.44%	£665,865	0.00%	£0	0.00%	£0	0.25%	£52,157	0.00%	£0	0.00%	£0	0%	£1,061,014	£1,061,014	£1,061,014
	Wickes, Widemarsh Street, Hereford	0.22%	£366,663	0.00%	£48,666	0.00%	£6,940	0.00%	£0	0.04%	£8,455	0.00%	£0	0.00%	£0	0%	£45,126	£45,126	£45,126
	Annetts Fine Furniture, Three Elm Road, Hereford	0.45%	£808,026	0.00%	£28,320	0.26%	£42,255	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£1,066,582	£1,066,582	£1,066,582
	BSQ, Holmer Road, Hereford	0.37%	£660,102	0.11%	£158,920	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.23%	£146,584	0%	£668,607	£668,607	£668,607
	Tudon Building Supplies, Northwood Yard, Burcott Road, Hereford	0.01%	£25,289	0.02%	£39,969	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£55,258	£55,258	£55,258
	Wynpark Garden Centre, Kings Acre Road, Hereford	0.01%	£2,369	0.00%	£138,087	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£140,456	£140,456	£140,456
	Total Zone 1A	64.67%	£170,307,220	64.13%	£127,253,553	58.92%	£6,866,192	49.81%	£1,362,466	56.67%	£12,026,655	30.77%	£16,241,536	27.08%	£30,174,050		£47,206,518	£433,016,191	£385,811,673
Zone 1B - Hereford (Rural)	Chester Valley Village Centre	0.01%	£18,367	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£18,367	£18,367	£18,367
	Rownhope Village Centre	0.00%	£108,024	0.00%	£75,121	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£183,135	£183,135	£183,135
	Knightsbridge Village Centre	0.00%	£0	0.26%	£446,238	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£446,238	£446,238	£446,238
	Woolley Village Centre	0.00%	£0	0.84%	£734,180	0.00%	£0	0.00%	£0	2.88%	£611,617	0.00%	£0	0.00%	£0	0%	£1,345,797	£1,345,797	£1,345,797
	Whitney-on-Wye Village Centre	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£0	£0	£0
	Budenham Village Centre	0.00%	£0	0.13%	£185,864	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£185,864	£185,864	£185,864
	Pewsey Road Village Centre	0.00%	£0	0.00%	£29,969	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£29,969	£29,969	£29,969
	Much Dewchurch Village Centre	0.14%	£254,036	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£254,036	£254,036	£254,036
	Peterchurch Village Centre	0.00%	£0	0.39%	£441,306	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£441,306	£441,306	£441,306
	Portbury Village Centre	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£74,136	0.00%	£0	0.00%	£0	0%	£74,136	£74,136	£74,136
	Railway Bridge Garden Centre, Whitestone, Hereford	0.01%	£16,007	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£16,007	£16,007	£16,007
	Whitstone, Business Park, Whitstone, Hereford	0.00%	£110,872	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£110,872	£110,872	£110,872
	Wormwood Farm Village Centre	0.00%	£110,872	0.00%	£12,160	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£123,032	£123,032	£123,032
	Total Zone 1B	0.16%	£668,162	0.13%	£2,016,661	0.00%	£0	0.00%	£1,362,466	3.86%	£611,617	0.00%	£0	0.00%	£3,061,510		£3,061,510	£3,061,510	£3,061,510
Zone 3 - Leominster	Kingston Town Centre	0.00%	£0	0.75%	£1,153,936	26.94%	£4,269,824	0.00%	£275,518	0.00%	£0	0.00%	£0	0.00%	£0	15%	£851,141.64	£65,25,416	£5,674,278
	1 Mart Warehouse, Bridge Street, Kingston	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£0	£0	£0
	Total Zone 3	0.00%	£0	0.75%	£1,153,936	26.94%	£4,269,824	0.00%	£275,518	0.00%	£0	0.00%	£0	0.00%	£0		£851,142	£65,25,416	£5,674,278
	Leominster Town Centre	0.00%	£0	2.73%	£4,421,336	3.84%	£567,769	39.17%	£24,637,469	0.17%	£66,431.1	0.00%	£18,136	0.00%	£0	15%	£143,53,362	£30,666,213	£30,666,213
	Penbridge Village Centre	0.00%	£0	0.00%	£125,160	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£125,160	£125,160	£125,160
	Wigmore Village Centre	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0%	£0	£0	£0
	Abul, Dingley Street, Leominster	0.00%	£0	0.00%	£0	0.00%	£0	0.38%	£241,318	0.00%	£0	0.00%	£0	0.00%	£0	0%	£241,318	£241,318	£241,318
	BSQ, Mill Street, Leominster	0.11%	£285,098	0.11%	£466,166	0.11%	£17,811	2.22%	£1,365,549	0.10%	£26,765	0.00%	£0	0.00%	£0	15%	£2,465,802	£2,465,802	£2,465,802
	Jewsons, Bridge Street, Leominster	0.00%	£0	0.00%	£0	0.00%	£19,181	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	15%	£2,877	£2,877	£2,877
	Morrison, Baron Cross Road, Leominster	0.00%	£0	0.00%	£0	0.98%	£1,668,722	2.48%	£1,558,501	0.00%	£0	0.00%	£0	0.00%	£0	15%	£26,488	£1,668,722	£1,668,722
	Cardinalville Village Centre	0.00%	£0	0.12%	£185,969	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	0.00%	£0	15%	£185,969	£185,969	£185,969
Total Zone 3	0.11%	£285,098	3.28%	£6,076,608	4.44%	£7,826,361	44.22%	£27,853,087	0.27%	£66,431.1	0.00%	£18,136	0.00%	£0		£26,488	£6,076,608	£6,076,608	
Zone 5 - Ludbury	McColl's, Hutton Park, Bromyard	0.00%	£0	0.33%	£501,462	0.00%	£0	0.41%	£261,062	24.58%	£52,18,034	0.31%	£162,895	0.00%	£0	10%	£152,669	£1,506,668	£1,526,669
	Total Zone 4	0.00%	£0	0.33%	£501,462	0.00%	£0	0.41%	£261,062	24.58%	£52,18,034	0.31%	£162,895	0.00%	£0		£152,669	£6,346,788	£6,346,788
	Ludbury Town Centre	0.00%	£46,345	0.00%	£0	0.00%	£0	0.00%	£0	0.03%	£133,418	41.26%	£21,771,261	0.15%	£106,019	15%	£3,326,859.85	£2,367,3	

Table 9 - Impact Range Summary Table

		Benchmark Store Turnovers (£m)		Original Diversion *		JW Diversion *		Revised Diversion * (November 2020)		HS Diversion (January 2021)		Original Residual Turnover *		JW Residual Turnover *		Revised Residual Turnover (November 2020)*		Residual HS Turnover (January 2021)		Original Impact		JW Impact		Revised Impact (November 2020)		HS Impact (January 2021)		
				£m	%	£m	%	£m	%	£m	%	£m	£m	£m	£m	£m	£m	%	%	%	%	%	%	%	%	%	%	
Ledbury																												
One Stop		£1.54	£0.22	£0.08	0.75%	£0.21	1.90%	£0.16	1.50%	£0.00	0.00%		£1.46	£1.33	£1.38	£0.22			5.3%	13.4%	10.6%	0.00%						
Spar		£1.30	£0.33	£0.08	0.75%	£0.21	1.90%	£0.16	1.50%	£0.03	0.25%		£1.22	£1.09	£1.14	£0.31			6.3%	15.9%	12.6%	8.17%						
Other Stores		£2.93	£0.96	£0.08	0.75%	£0.41	3.80%	£0.16	1.50%	£0.08	0.75%		£2.85	£2.52	£2.77	£0.88			2.8%	14.1%	5.6%	8.50%						
Town Centre		£5.77	£1.51	£0.25	2.25%	£0.83	7.70%	£0.49	4.50%	£0.11	1.00%		£5.53	£4.95	£5.28	£1.40			4.2%	14.3%	8.5%	7.21%						
Co-Op		£7.31	£3.07	£0.54	5.0%	£1.05	9.60%	£0.93	8.50%	£0.41	3.75%		£6.77	£6.27	£6.39	£2.66			7.8%	15.0%	12.7%	13.32%						
Tesco		£10.98	£13.13	£2.45	22.5%	£2.87	26.40%	£2.50	23.00%	£2.85	26.15%		£8.53	£8.11	£8.48	£10.28			22.1%	25.9%	22.8%	21.69%						
Other Stores		£0.65		£0.05	0.5%	£0.11	1.00%	£0.05	0.50%				£0.60	£0.54	£0.60			8.1%	16.1%	8.4%								
Edge-of-Centre		£18.95	£16.19	£3.05	28.00%	£4.03	36.90%	£3.48	32.00%	£3.26	29.90%		£15.90	£14.92	£15.46	£12.94			16.3%	21.5%	18.4%	17.5%						
Town Centre / Edge of Centre		£24.72	£17.70	£3.29	30.25%	£4.86	44.60%	£3.97	36.50%	£3.36	30.90%		£21.43	£19.87	£20.75	£14.34			13.4%	19.8%	16.1%	19.01%						
Aldi Leaden Way		£12.39	£11.28	£4.87	44.75%	£3.85	35.40%	£4.68	43.00%	£5.29	48.60%		£7.52	£8.54	£7.71	£5.99			39.70%	31.40%	37.78%	46.93%						
Out-of-Centre		£12.39	£11.28	£4.87	44.75%	£3.85	35.40%	£4.68	43.00%	£5.29	48.60%		£7.52	£8.54	£7.71	£5.99			39.70%	31.40%	37.78%	46.93%						
Total Ledbury		£37.12	£28.98	£8.17	75.00%	£8.71	80.00%	£8.66	79.50%	£8.66	79.50%		£28.95	£28.40	£28.46	£20.32			22.00%	23.47%	23.32%	29.87%						
Zone 1A Hereford Stores		£1.76	£1.76	£0.90	8.25%	£0.90	8.25%	£0.90	8.25%	£0.90	8.25%		£0.86	£0.86	£0.86	£0.86												
Zone 6 Ross-on-Wye Stores		£0.58	£0.58	£0.19	1.75%	£0.19	1.75%	£0.25	2.25%	£0.25	2.25%		£0.39	£0.39	£0.34	£0.34												
Stores Elsewhere (Inflow)				£1.63	15.00%	£1.09	10.00%	£1.09	10.00%	£1.09	10.00%																	
Total Outside Catchment				£2.72	25.00%	£2.18	20.00%	£2.23	20.50%	£2.23	20.50%		£1.26	£1.26	£1.20	£1.20												
				£10.89	100%	£10.89	100%	£10.89	100%	£10.89	100%																	

Note

Total numbers may not match precisely due to rounding+/-

* Diverted Turnovers based on benchmark turnovers