

Bishop's Castle: Town Centre Audit Analysis, 2023



Shropshire
Council

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For more information, please contact:

BusinessIntelligence@shropshire.gov.uk

Introduction

An audit of businesses operating in Bishop's Castle's main shopping streets was undertaken in September 2023 as part of an on-going piece of research reviewing the vibrancy of Shropshire's main market towns and key settlements. Bishop's Castle centre was first audited in February 2020 and then again in September 2020, 2021 and 2022. The objective of these audits is to provide a snapshot of the vitality of the town by investigating:

- The range and diversity of the retail offer
- The number and types of non-retail businesses operating
- The number and location of vacant properties
- Distinctive characteristics within the town, for example a strong tourism offer or a high penetration of "low end" traders
- The amount, location and type of domestic residences in the centre of the town

The research also aims to monitor change over time. The functionality of the High Street has been changing for some time, and through 2020 and 2021 the coronavirus pandemic has posed additional challenges to High Street businesses. The 2020 audits for all towns took place in September, following the first national lockdown. Non-essential retail and hospitality businesses were able to trade at this time (albeit with strict social distancing measures in place). The 2021 audits also took place when High Street businesses were able to trade. By 2022 High Streets were trading normally with no Covid-19 restrictions, but the cost of living crisis was gathering pace. Inflation was elevated in 2023, which has also impacted people's spending power.

Key Findings

- 67 commercial units, occupying 8,300m² gross floor space
- Amongst the smallest centres in Shropshire, accounting for 2.6% of all Shropshire High Street traders
- However, more stores per head of population than any other town, at a rate of 43 units per 1,000 population (13 on average for Shropshire)
- Average store size 124m² compared with a Shropshire average of 147m²
- 147 residential premises in the main shopping area, giving a ratio of 0.5:1 commercial versus residential properties
- Bishop's Castle had a 9% business churn rate between 2022 and 2023, down from 15% in 2022.
- 10% of all commercial premises were vacant in 2023—this is slightly below average in relation to the rest of Shropshire (11% across all towns) and remains unchanged compared with 2022
- Tourism & leisure businesses are strongly represented in the town although comparison retail accounts for the largest share of business premises
- Relatively low numbers of restaurants/takeaways are located in the town, although the public houses in the town centre (classified as tourism and leisure businesses) also offer hospitality
- Retail services businesses are also under-represented in Bishop's Castle

Methodology Statement

Only the main retail centre of the town was surveyed, as shown on Map 4.

Both retail and non-retail businesses will be operating in other parts of the town.

All commercial premises within the defined area were audited, and classified as:

- Comparison Retail—defined as stores selling non-food/drink/tobacco products
- Convenience Retail—defined as stores selling food/drink/tobacco products
- Retail Service— defined as stores selling a service rather than a product, such as hair dressers or travel agents
- Financial & Business Services — for example, banks, solicitors, accountants, estate agents
- Health - including dentists, health centres, GP practices, alternative therapies
- Restaurants & Takeaways—including cafés and tea rooms
- Tourism & Leisure—hotels and public houses/bars as well as visitor attractions and cultural assets
- Education & Community Facilities—including schools, colleges, libraries, community centres
- Other Non-Retail
- Vacant

Gross floor space was matched to each premise using OS Master Map. It should be noted, that where two outlets shared the same premise (as shown on Master Map) an assumption was made that both occupied the same amount of floor space. For multi-storey buildings occupied by multiple businesses, it is assumed that all floors have the same gross space. Unless it is clear that a single business occupies more than one floor of a building, it has been assumed that it occupies only one floor. This means that in some cases, gross floor space may be under-estimated as some traders use upper floors for storage. No estimate relating to net floor space has been made.

Businesses occupying above ground floor level premises have only been included in this audit if their presence is clear from street level (by door signs or external hoardings for example). It is likely, therefore, that some non-consumer businesses operating in the area may have been missed.

Premises are assumed to have changed hands if their name or function has changed since the 2022 audit. In some cases though, ownership may be unchanged but the business has been rebranded or renamed.

An estimate of the number of domestic residences in the main retail centre has been made using OS Address Base (complete version) using all residential classification codes.

Retail Centre Hierarchy

Town centres represent important employment, entertainment and shopping hubs for their local population and hinterland. They also represent an important component of the visitor economy.

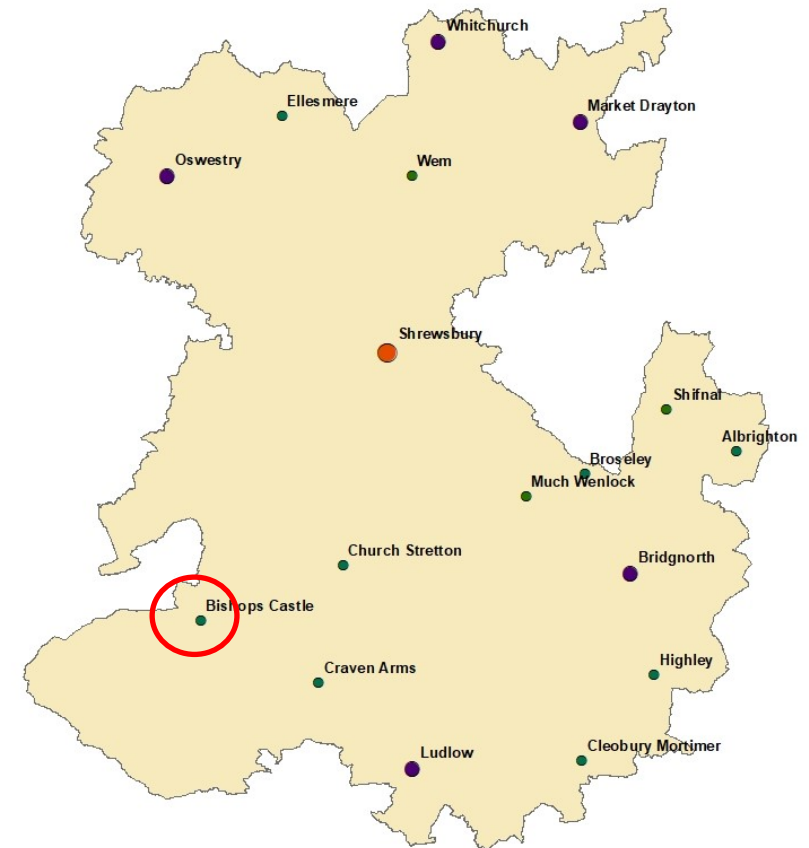
However, not all centres have comparable functions. Larger centres tend to attract workers and shoppers from much further afield than smaller centres, and consequently offer a much greater volume and variety of retail trade and consumer and business services.

In order to benchmark Shropshire towns against each other in an appropriate manner, the following hierarchy has been adopted:

- Tier 1: Shrewsbury
- Tier 2: Bridgnorth
Ludlow
Oswestry
Market Drayton
Whitchurch
- Tier 3: Albrighton
Bishops Castle
Broseley
Church Stretton
Cleobury Mortimer
Craven Arms
Ellesmere
Highley
Much Wenlock
Shifnal
Wem

With 67 commercial units in the town centre, Bishop's Castle has a large retail centre in relation to the size of the town's population.

Map 1: Shropshire's Main Retail Centres



About Bishop's Castle

Bishop's Castle is a small market town located in the south west of Shropshire close to the Welsh border. The origins of the town date back to the 8th Century when the King of Mercia, Offa, built a dyke to protect his kingdom. Today, it is a popular destination for walkers, and the commercial offer in the town reflects its status as a tourism hub.

Today the town has a population of 1,843 and 868 households (*2021 Census*). The town's population has remained stable over the last decade. It is the nineteenth largest settlement in the county.

Bishop's Castle is located in a rural area and lacks direct access to key arterial roads. The A49 is 10 miles east of the town and is accessed via local A and B roads. The A488 is the main transport route in and out of the town heading north to Minsterley (13 miles) and on to Shrewsbury. The A488 heads south to Clun (6 miles) and Knighton (13 miles). Bishop's Castle is no longer on the national rail network. The closest station is at Craven Arms (10 miles). The total population within a 10 mile radius is approximately 24,500.

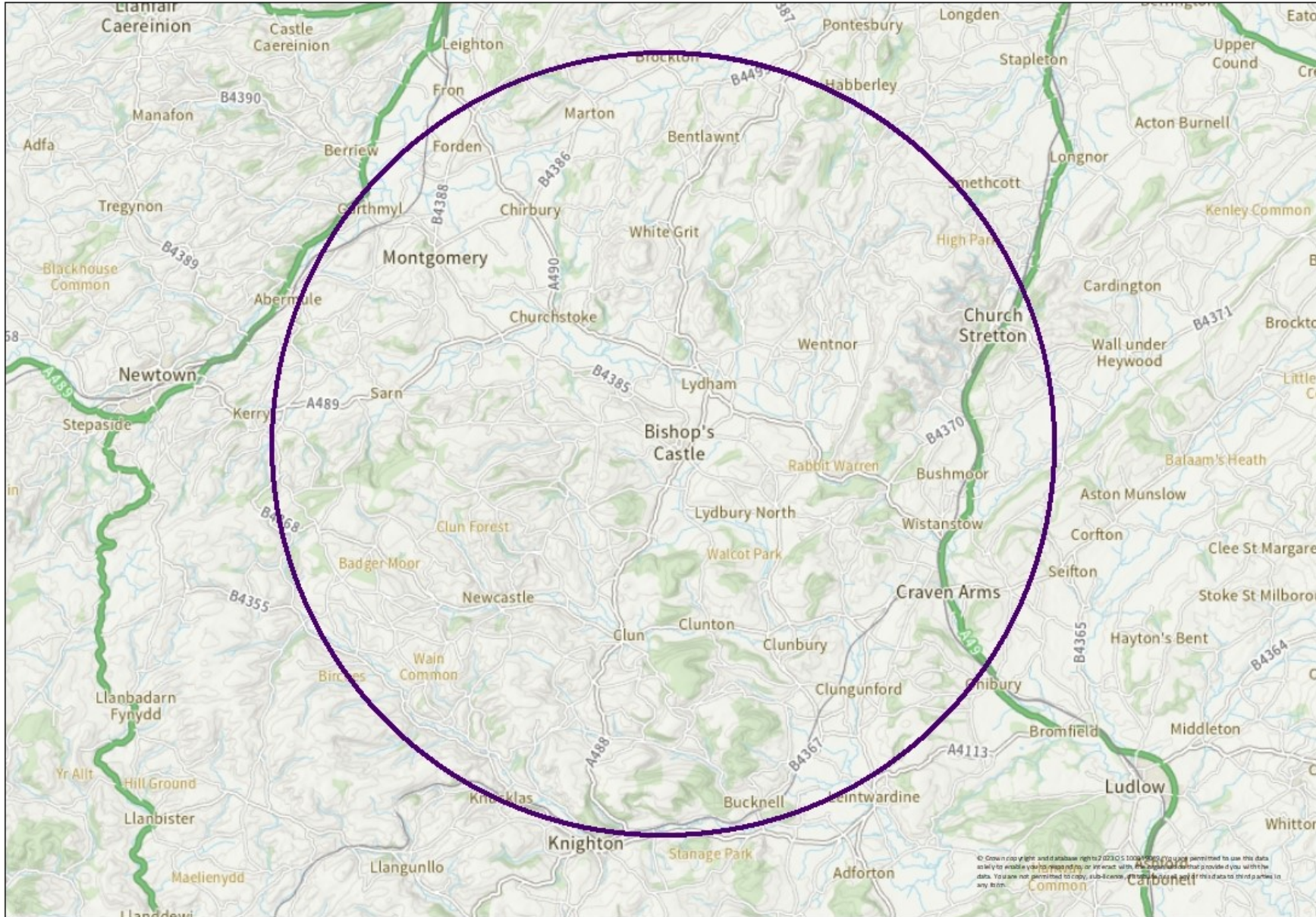
Bishop's Castle provides approximately 500 jobs across the town council area (*ONS Business Register and Employment Survey, 2022*). Key sectors include:

- Manufacturing (32.4% of jobs)
- Health (28.6% of jobs)
- Retail (9.5% of jobs)
- Accommodation and Food Services (7.6% of jobs)

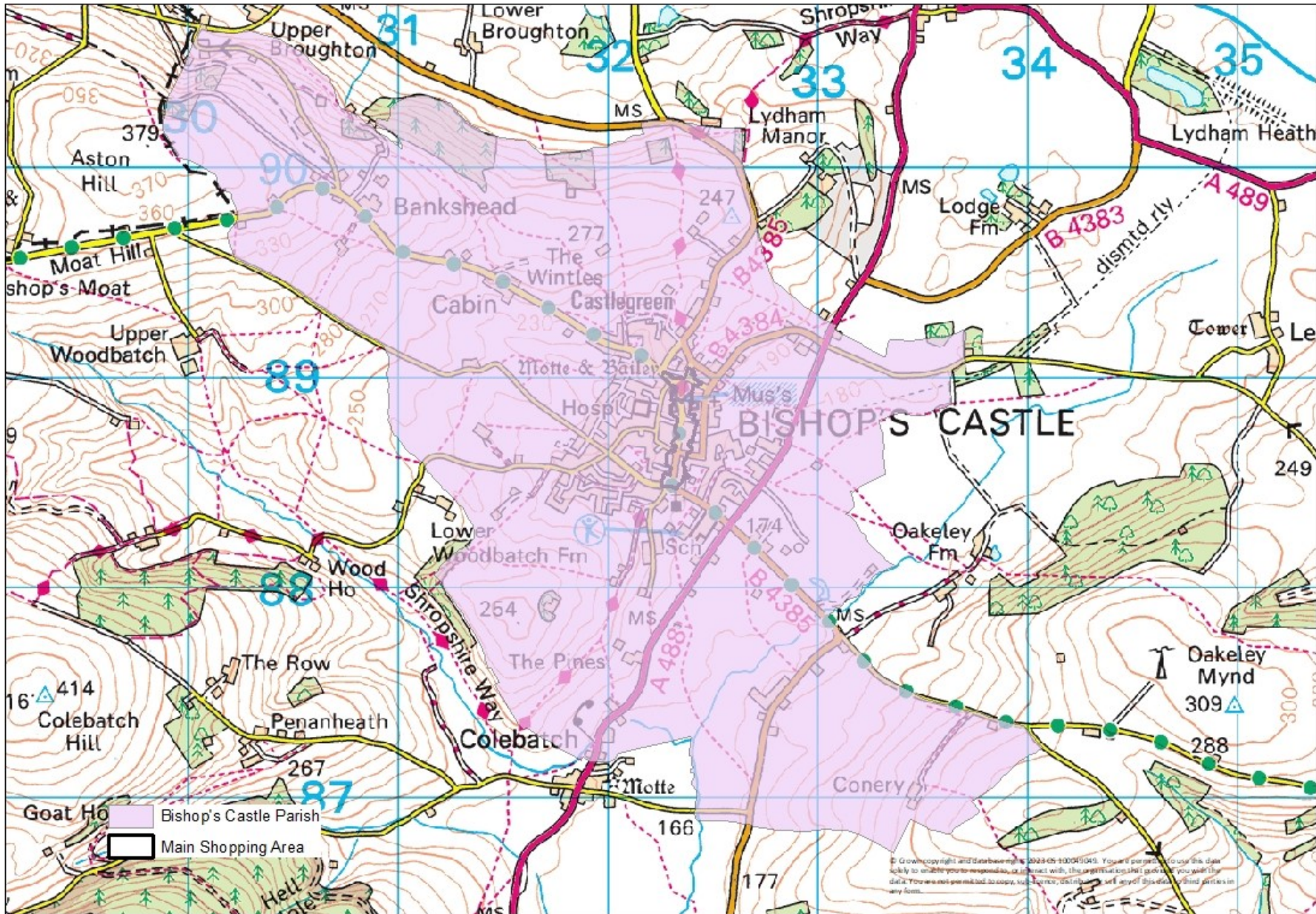
Overall, Bishop's Castle town council area (depicted on Map 3) covers an area of 755 hectares. The main shopping area (depicted on Map 4) is much smaller than this, at around 5 hectares.

The town comprises predominantly independent retail and there is a significant amount of residential housing stock in the main shopping area of the town. A farmers' market is held on the third Saturday of the month in the town hall. There is also a flea market on the first Saturday of the month, as well as a livestock market.

Map 2: Location of Bishop's Castle showing 10 mile radius



Map 3: Bishop's Castle Town Council Area



Map 4: Main Retail Shopping Area

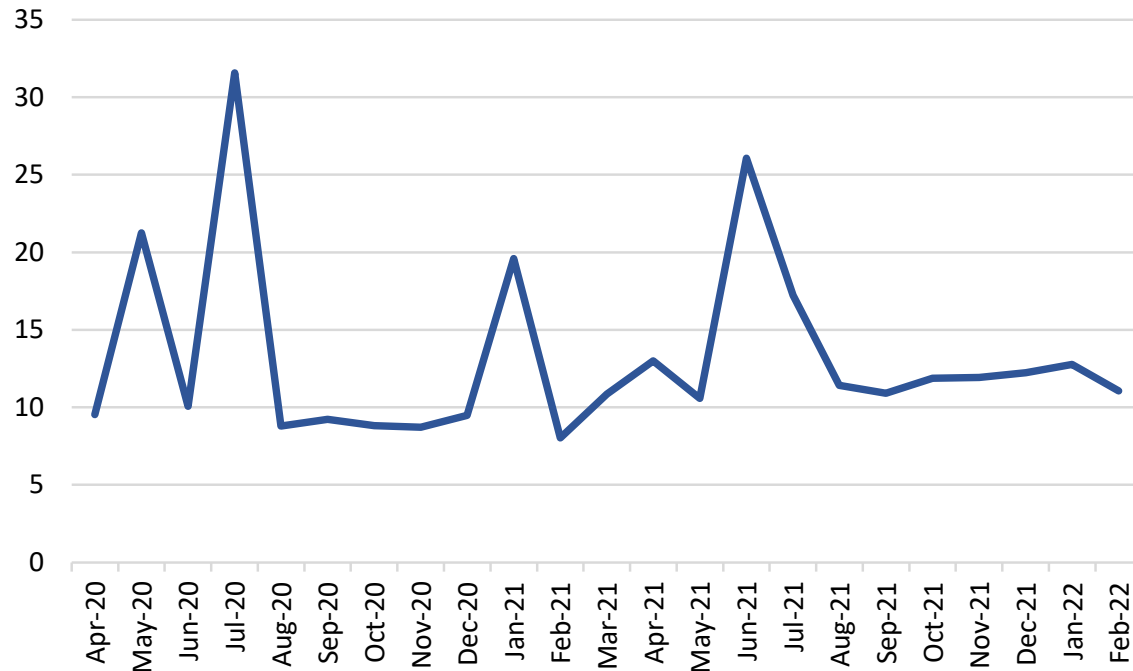


Catchment and Footfall

The map on the following page shows the main catchment for Bishop's Castle town centre. It covers the town itself and a substantial hinterland that stretches into Wales to the west. The total population within the catchment is 42,764 people, and the average catchment distance is 32.17 miles. This is the longest of any Shropshire town and reflects the large amount of rural hinterland for which Bishop's Castle is a key centre. Notwithstanding this, the catchment, while covering a sizeable area, represents a relatively small number of people.

The chart below shows the percentage of the catchment population visiting Bishop's Castle at least once a month since April 2020. The conversion rate has ranged between 8% (February 2021) and 31.6% (July 2020).

Chart 1: Catchment Conversion (%)

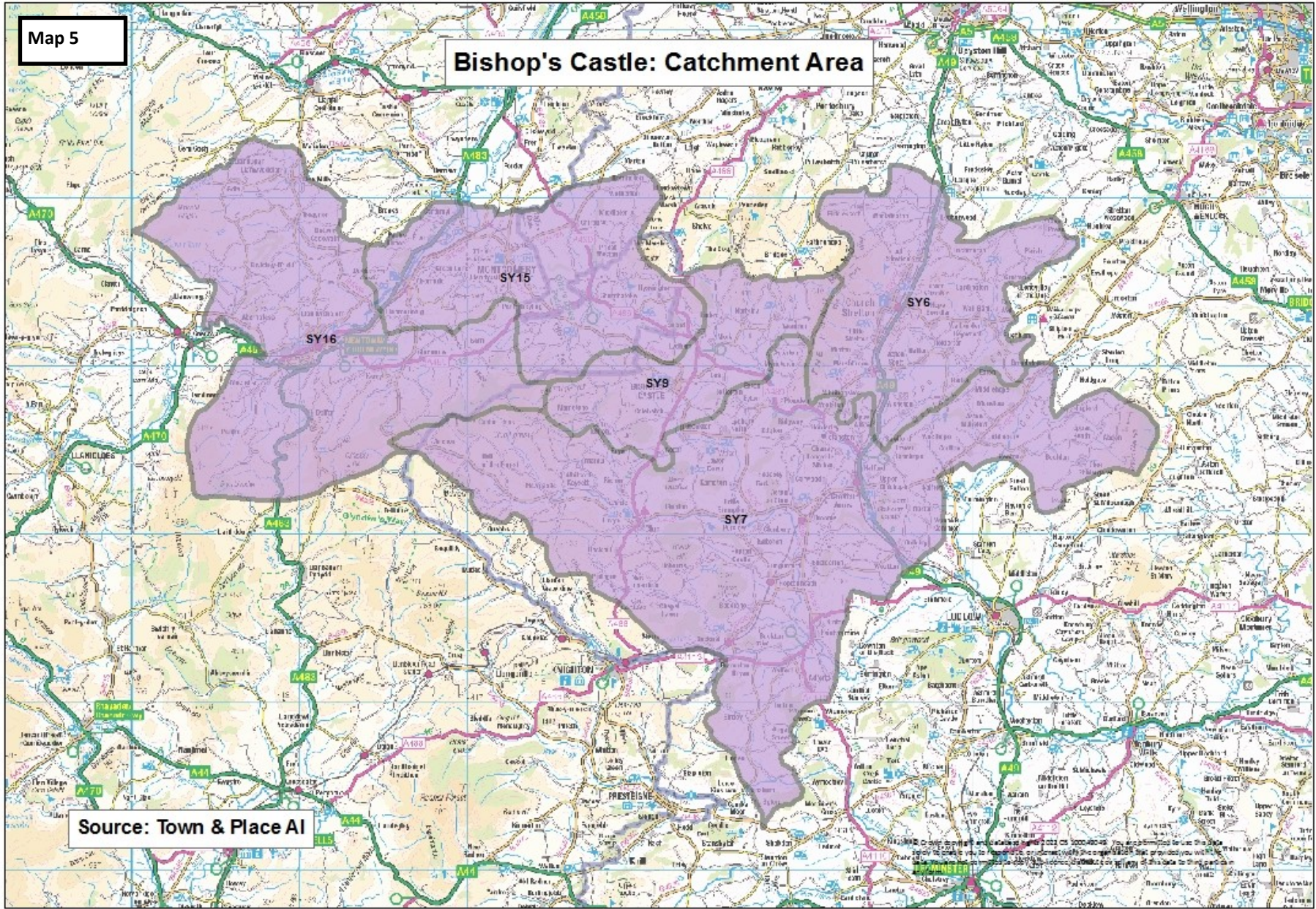


Source: Town & Place AI

Note: Catchment defined as any postcode district from which at least 3% of residents visited the town on at least one occasion during the preceding month. Hence, the precise catchment area and catchment population will change on a monthly basis.

Map 5

Bishop's Castle: Catchment Area



Source: Town & Place AI

The map on the following page shows the percentage of each postcode that forms part of the Bishop’s Castle catchment area that visited the town centre at least once in February 2022.

The overall catchment conversion stood at 11.1% in February 2022. However, this ranges from almost 65% in SY9 (where the town is located) to less than 5% in SY16.

Overall, 38% of visitors to Bishop’s Castle originate from the postcode district that makes up the core catchment (SY9). This proportion is low compared to most other Shropshire towns and is reflective of the town’s substantial rural hinterland. The remainder of the catchment accounts for 44% of visitors, with the remaining 18% representing visitors from further afield (classified as tourists). The proportion of visitors accounted for by tourists is relatively high.

Chart 2: Breakdown of Visitors to Bishop’s Castle, February 2022

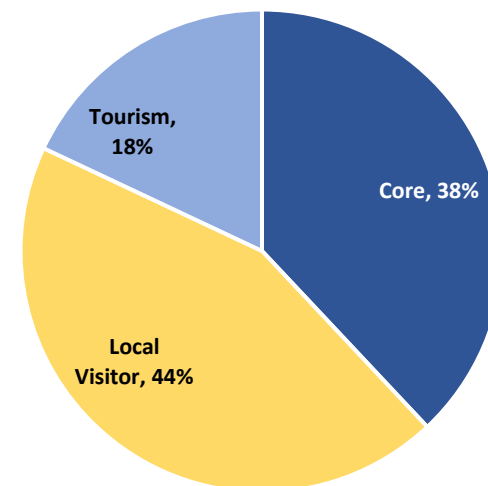
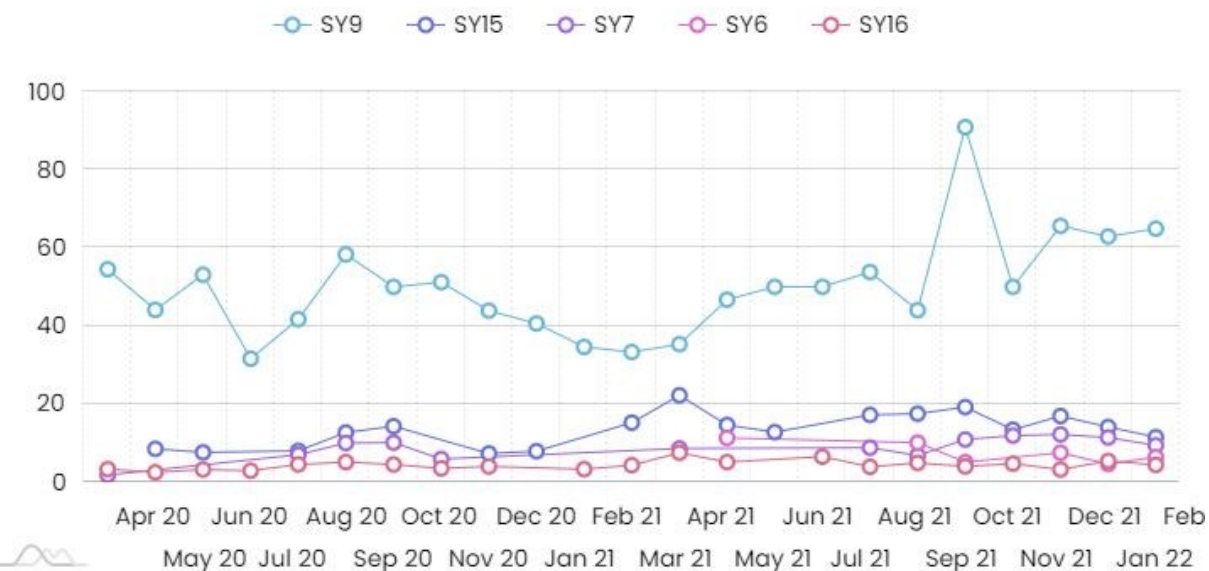


Chart 3 : Trends in Bishop’s Castle Postcode Conversion

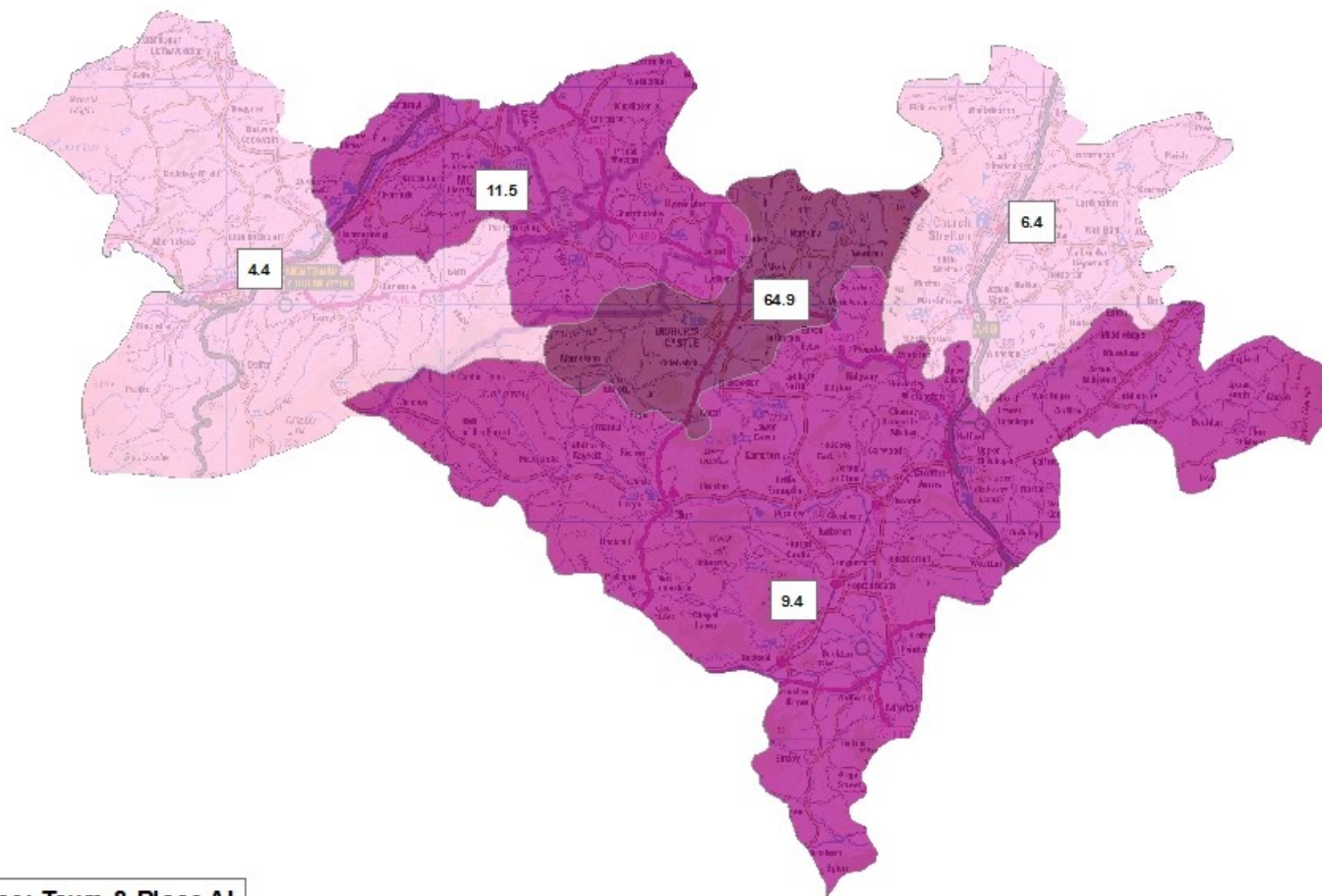
Postcode Conversion Trend (%)



The adjacent chart shows trends in postcode conversion for the Bishop’s Castle catchment area. It shows that conversion from the core postcode district SY9 has been consistently higher than any other since April 2020, but also that conversion rates are subject to a significant level of fluctuation. In October 2021, when the conversion rate peaked, more than nine out of 10 SY9 residents visited Bishop’s Castle town centre at least once.

Source: Town & Place AI

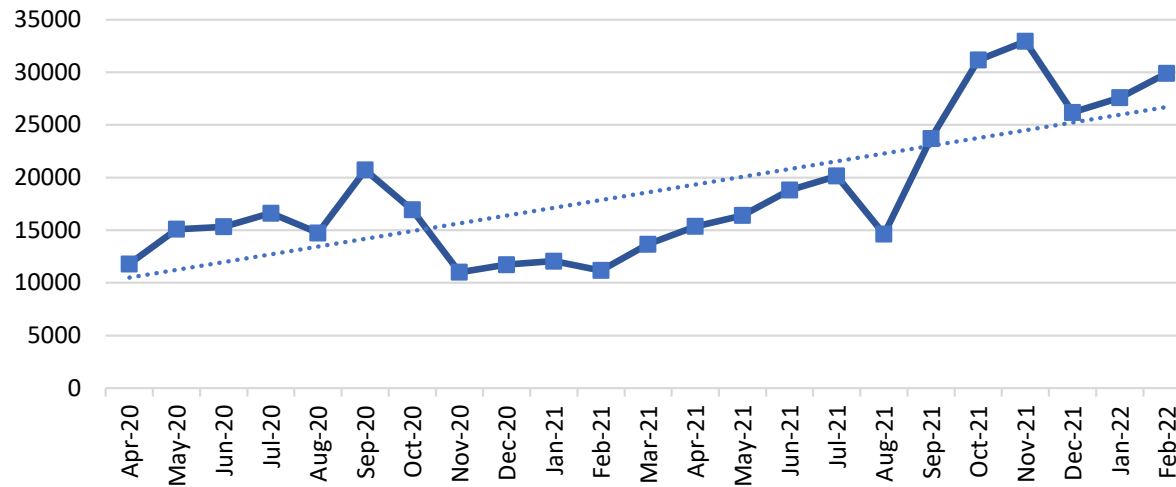
Bishop's Castle: Postcode Conversion February 2022



Source: Town & Place AI

The following chart shows footfall in Bishop’s Castle town centre from April 2020 to February 2022. Not surprisingly, the overall trend is upward given that the start of the review period coincided with the first national lockdown arising from the Covid-19 pandemic. Overall footfall stood at 29,899 in February 2022, which represents an increase of 168% over the same month in 2021.

Chart 4: Trends in Footfall



Bishop’s Castle attracted 3,194 unique visitors in February 2022, each of whom visited an average of 9.4 times to generate footfall of just under 30,000. The average dwell time was 37 minutes.

Alternative Shopping Destinations

Although 64.9% of SY9 residents visited Bishop’s Castle in February 2022, the town’s population also utilises alternative shopping destinations further afield which may offer a greater choice of comparison retail and more leisure and hospitality opportunities. Almost a quarter of residents (24.3%) visited the county town, Shrewsbury, at least once in February 2022. An even higher proportion, 29.7%, visited Ludlow. As shown in the charts below, the conversion rate for both towns from the SY9 postcode district fluctuates, but for Ludlow, visit numbers have been clearly rising over the last year.

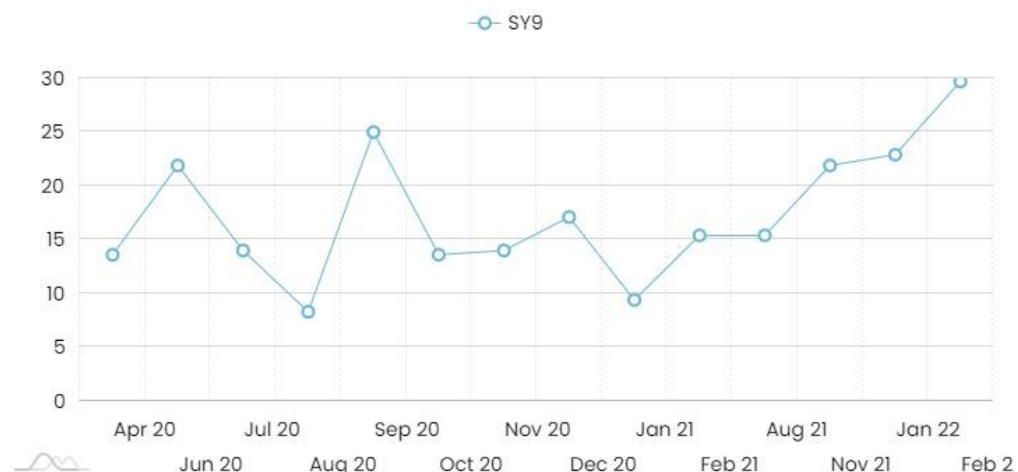
Chart 5: Shrewsbury

Postcode Conversion Trend (%)



Chart 6: Ludlow

Postcode Conversion Trend (%)



Residents of the SY9 postcode are also frequent visitors across the border into Wales. Newtown is the closest Welsh town to Bishop’s Castle, and 18.9% of SY9 visitors went to Newtown at least once in February 2022. Welshpool is slightly further afield, with 10.8% of Bishop’s castle residents visiting.

Chart 7: Newtown

Postcode Conversion Trend (%)



Chart 8: Welshpool

Postcode Conversion Trend (%)



Postcode conversion charts have been downloaded from the Town and Place AI tool, which monitors visitor numbers and footfall across a range of towns and city centres across the UK.

Key Audit Results

A total of 67 commercial premises are located within the Bishop’s Castle survey area. These are primarily in Church Street (23 businesses), High Street (25 businesses), and Market Square (15 businesses) with a small number in Chapel Yard, New Street and Salop Street. Gross floor space allocated to these businesses is over 8,300m² (more than three quarters in Church Street and High Street). The average store size is 124m² with units ranging in size from 20m² to 566m². There was no change in the number of commercial units operating in Bishop’s Castle between 2019 and 2022; however, in 2023 one premise in Market Square was converted into a residential property.

Chart 9: Number of Commercial Premises in Bishop’s Castle, 2019—2023

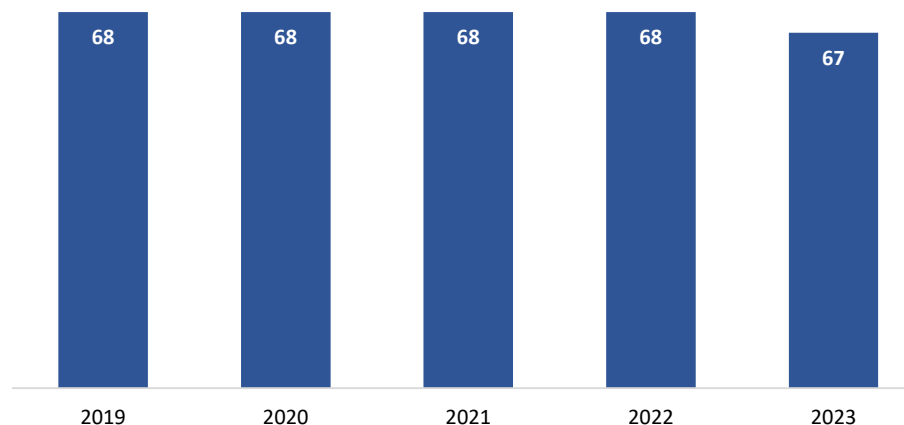
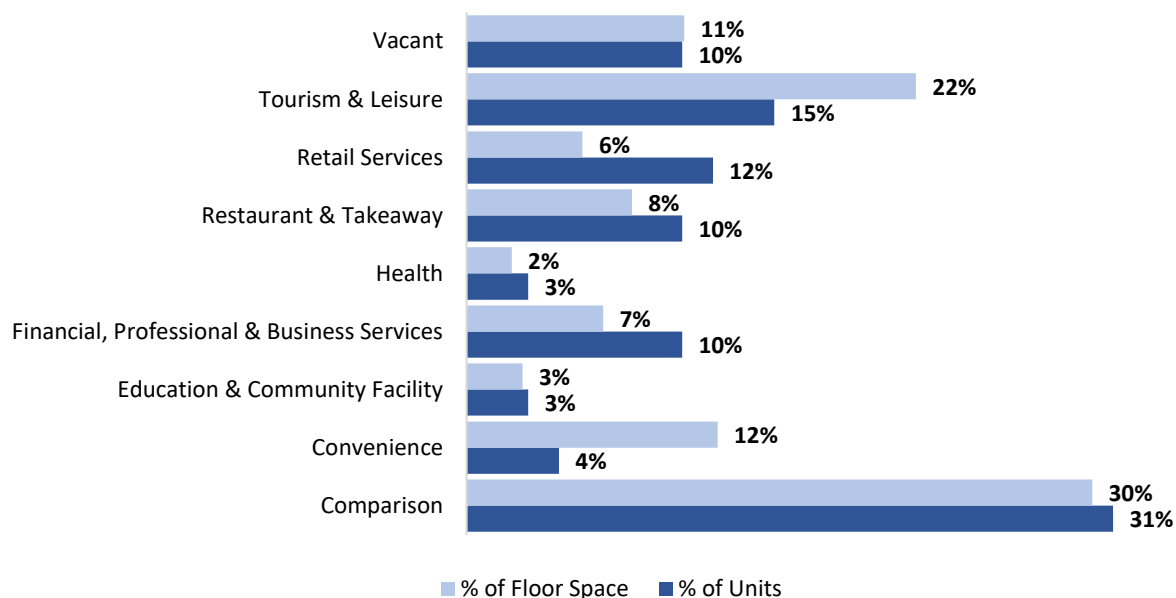


Chart 10: Breakdown of Commercial Premises by Classification, 2023



The highest proportion of commercial units are allocated to comparison retail (31%). They account for a similar share of floor space (30%). Convenience retail accounts for only a small share of units (4%) but for a notably higher proportion of floor space (12%). 10% of units are attributable to restaurants and takeaways, while 10% of units are filled by a financial/professional/business services operator. A relatively small number of retail service businesses operate in the town (12% of units accounting for 6% of floor space). A significant number of units are filled by tourism & leisure operators (15%), with these accounting for 22% of gross floor space.

There are seven vacant premises in Bishop’s Castle in 2023 (10% of units), which is the equivalent of just over a tenth of floor space.

Change Since 2022

There has only been limited change in the commercial mix in Bishop's Castle over the last several years, including 2023. The overall number of commercial premises fell by one between the 2022 and 2023 audits. The loss of one operator in both the retail services and comparison retail sectors was counter-balanced partially by the opening of an additional operator in the health sector.

The number of vacant premises remains unchanged.

The overall churn rate stood at 9% in 2023, which is much reduced compared with 2022 (15%). It is at a similar level to churn in 2021 (7%) and 2020 (9%).

Chart 12: Breakdown of Business Churn 2019-2023

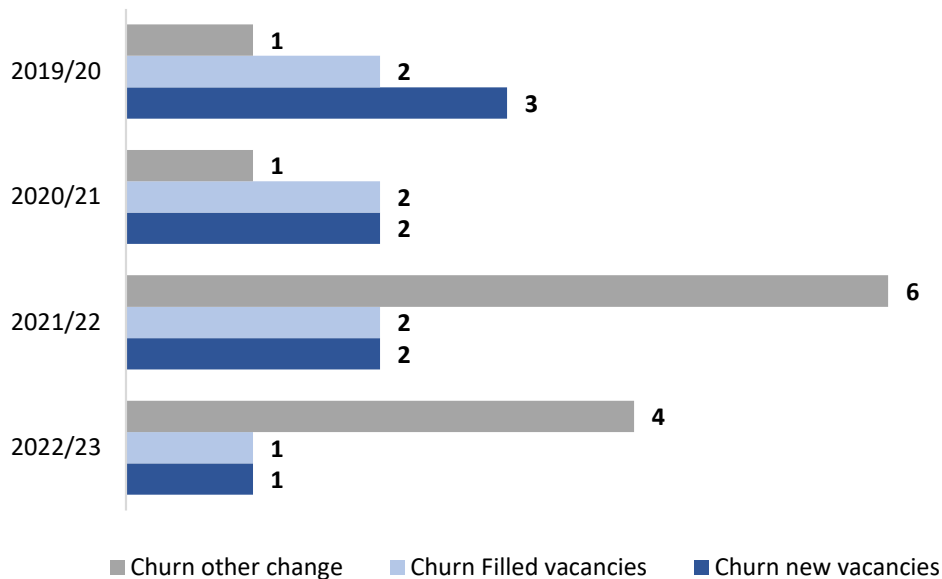
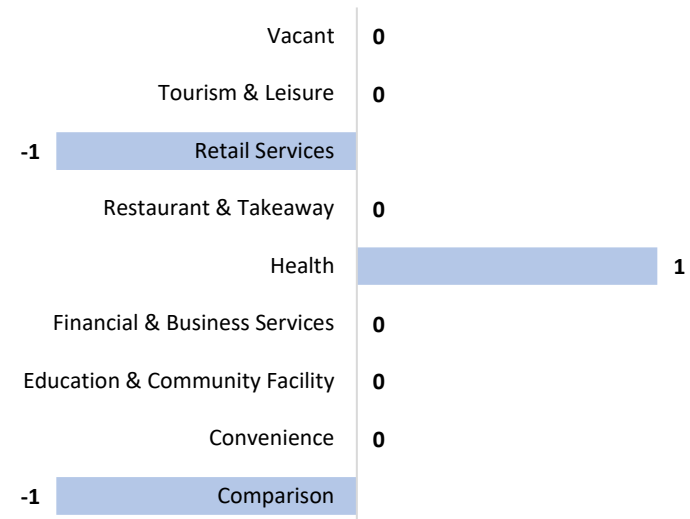


Chart 11: Change in Number of Units by Category, 2022/2023



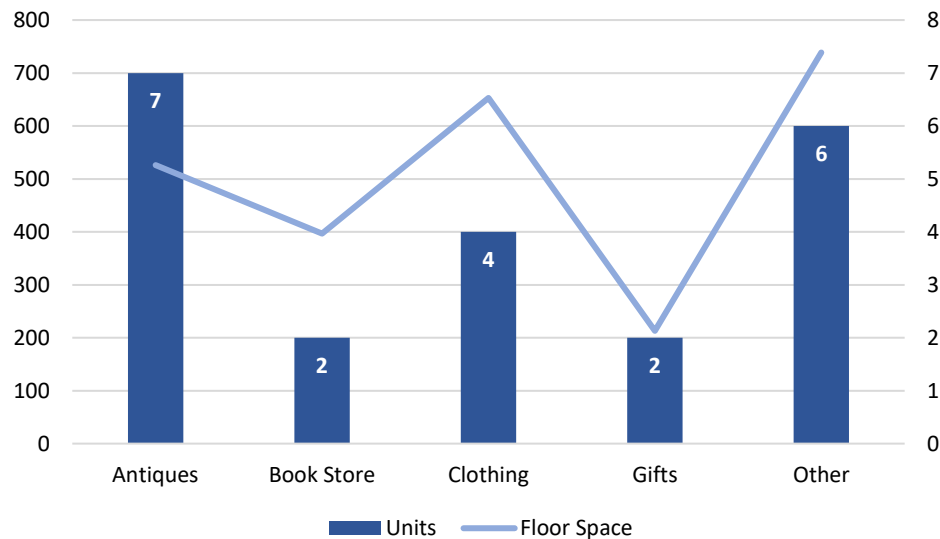
The chart opposite shows change on the High Street broken down by new vacancies, old vacancies that have been filled and all other change compared with the previous year.

Less than a fifth of churn in 2023 was attributable to new vacancies, which equates with just one new vacant premise. This compares with two new vacancies in 2022 and 2021 and three in 2020. One previously empty unit became occupied in 2023, compared with two in each of the preceding three years. Other change accounted for the largest share of churn in 2023 (67%) as it did in 2022.

Comparison Retail

The largest proportion of commercial units and the largest proportion of floor space is dedicated to the comparison retail category in Bishop’s Castle, accounting for just under a third of units and floor space. This equates with 21 stores with just over 2,500m² of floor space. This proportion is higher than is typical for a town the size of Bishop’s Castle, and perhaps reflects its rurality and relative self-containment. The number of operators in the comparison sector has fluctuated slightly over the past three years, but fell by one in 2023, as shown in the adjacent chart.

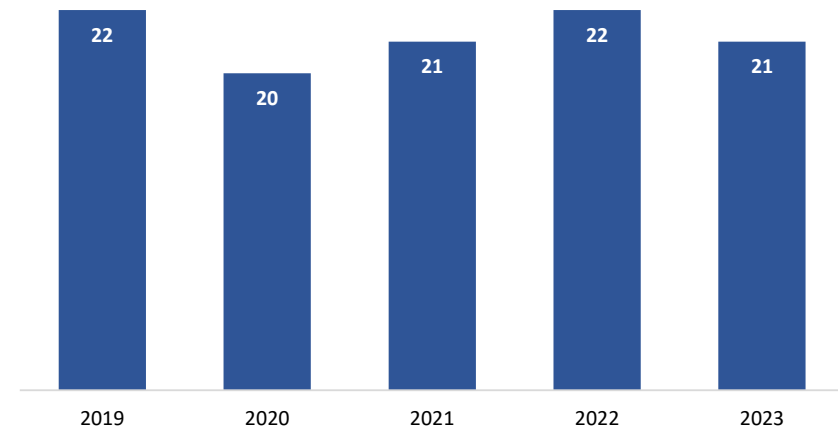
Chart 14: Breakdown of Comparison Retail by Type, 2023



The majority of stores are independent, although the town is home to a branch of Severn Hospice charity shop, which is a County-wide charity. This is the only charity store in the town.

The mix of comparison retailers in Bishop’s Castle helps support the town’s tourism offer as well as providing goods to local residents, for whom the distance to a larger town is considerable.

Chart 13: Number of Comparison Retail Stores, 2019—2023



Within the town there are four clothing/shoe shops, seven stores selling antiques, two selling gifts and two book stores. One of the gift shops is also a florist, while one of the book stores incorporates a café. There is a gallery which sell art in the town. Other store types include a charity shop, a pet shop, a pharmacy, a petrol station and a picture framer.

Since 2022, two new antique stores have opened, one in the premise of a former dog groomer and the other in the premises where the picture framer used to be located (this having relocated to a different premise in Market Square).

Two gift shops were closed between the 2022 and 2023 audits as was an art gallery.

Convenience Retail

There are three convenience stores within the main shopping area of Bishop's Castle. These account for 4% of all units and for 12% of gross floor space. As well as a supermarket (the Co-op), there is a Spar convenience store attached to the petrol station and a butcher. There has been no change in the number or type of convenience store operating since 2019.

Restaurants & Takeaways

10% of units in Bishop's Castle are attributable to restaurants and takeaways, with this category accounting for a slightly lower proportion of gross floor space (8%). The seven units are split between cafés (14%), restaurants (42%) and takeaways (42%). An additional café is located within one of the book stores in the town. There was no change in the number or mix of operators between 2022 and 2023.

A range of cuisines is represented, including Indian, Chinese and fish and chips.

The proportion of the town allocated to restaurants and takeaways is comparatively small, although there are pubs which also serve food.

Chart 14: Breakdown of Units in the Restaurant/Takeaway Sector, 2023

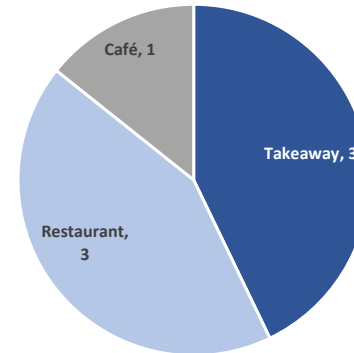
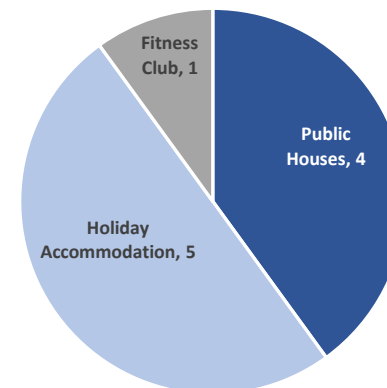


Chart 15: Breakdown of Units in the Tourism & Leisure Sector, 2023

Tourism & Leisure

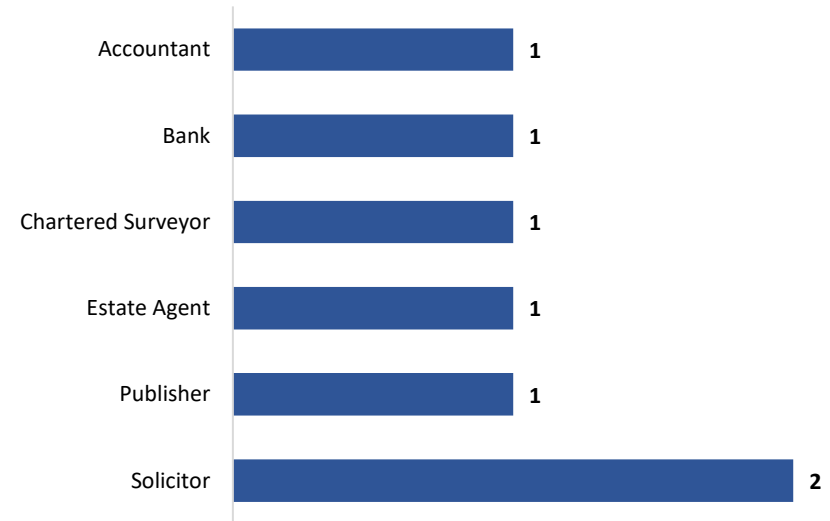
Also within the hospitality sector, there are four public houses. These take up approximately 840m² gross floor space. One public house has closed since 2019. There are also two B&Bs and three holiday lets located in the town centre. A high proportion of the key visitor accommodation within the town is located directly in the main shopping area. However, there is one fewer B&B in the town than there was in 2020. There is also a health and fitness outlet. There was no change in the number or mix of operators between 2022 and 2023.



Finance & Business Services

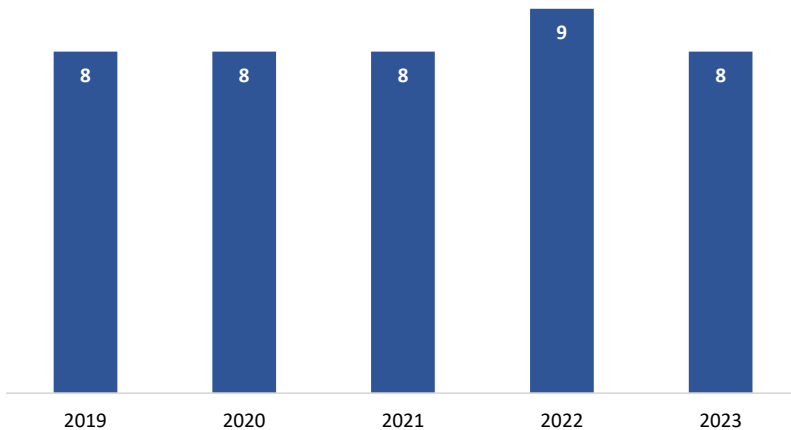
There are seven commercial operators in the finance and business services category in Bishop's Castle town centre, accounting for over 550m² of gross floor space. Included within this classification are two solicitors, an accountant, two estate agents (including a chartered surveyor), a publisher and a bank (HSCB). The number of operators in this classification remained unchanged in 2023 compared with the previous year.

Chart 17: Number of Finance & Business Services Providers by Type, 2023



Retail Services

Chart 17: Number of Retail Services Businesses, 2019 - 2023



There are eight retail service businesses operating in Bishop's Castle town centre, with these accounting for almost 500m² of gross floor space. This category is under-represented in Bishop's Castle compared with other Shropshire towns of a similar size, accounting for 12% of units and 6% of floor space..

The number of outlets operating in this classification was stable between 2019 and 2021, but grew by one in 2022 with the addition of a new barber's shop. By 2023, this barber's shop had closed, taking the number of commercial units in this sector back down to eight.

The highest number of operators are in the barber and hair & beauty salon classification, with these together representing 50% of units and 41% of floor space. The number of outlets in this classification fell by one in 2022.

In addition, there is an optician, a travel agent, a post office and a dog groomer. The latter opened within the town between the 2020 and 2021 audits but relocated in both 2022 and 2023.

Health

There are two premises occupied by health care providers in Bishop’s Castle—a dentist and a sports therapy provider. The latter opened in a previously empty premise between the 2022 and 2023 audits.

Vacant Units

10% of Bishop’s Castle town centre outlets are vacant (11% of gross floor space), which is the equivalent of 7 units covering around 880m² floor space. This is around average in comparison with similar-sized market towns in Shropshire (11% vacancy rate across the Shropshire towns surveyed). The 2023 vacancy rate was lower than the national average, which stood at 13.9% in the second quarter of 2023 according to BRC (data relating to high streets only). Two vacant premises are on Church Street, one is on the High Street, three in Market Square and one in New Street.

The number of vacancies has remained stable at seven since 2021. Just 14% of vacant premises (one unit) was newly vacant in 2023. Three units (43% of vacancies) have been empty since 2020 and one since at least 2019.

Chart 19: Number of Retail Services Businesses by Type, 2023

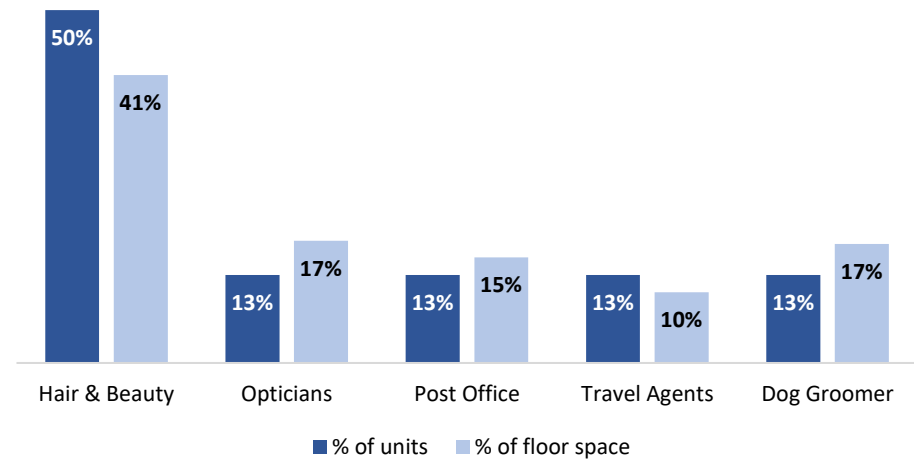
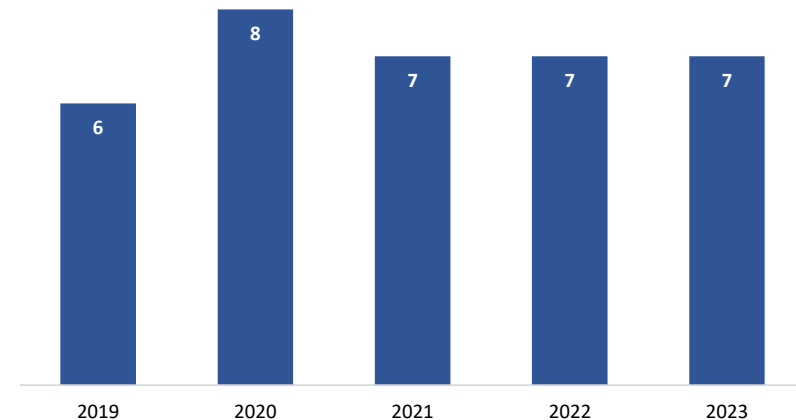


Chart 20: Number of Vacant Units, 2019-2023

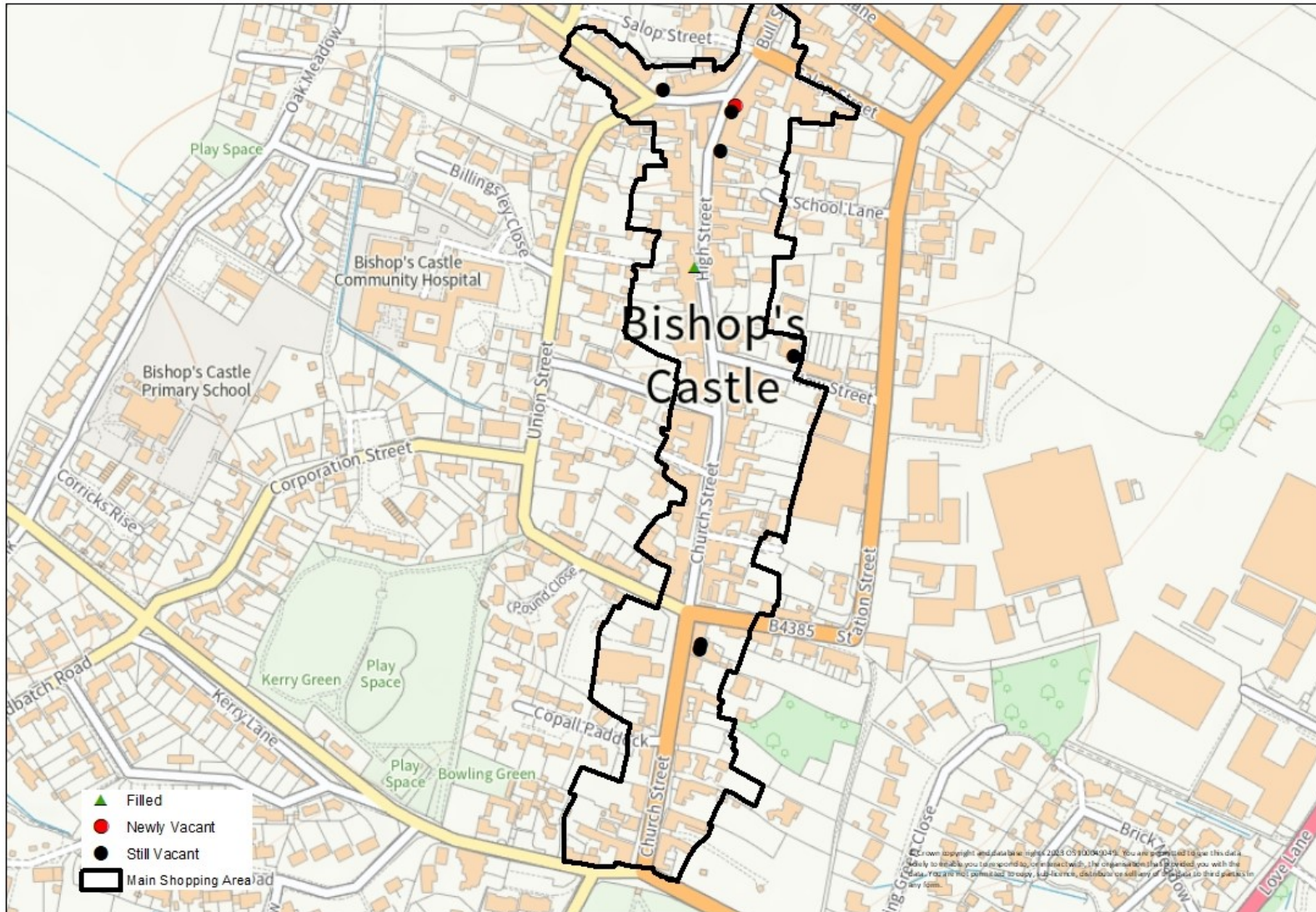


Map 7: Location of Vacant Commercial Premises, 2023



Six premises which were vacant in 2022 remained so in 2023. One new vacant property was recorded in 2023, but this was cancelled out by a previously vacant premise becoming filled. There was no net change in vacancy numbers in 2023 therefore.

Map 8: Change in Location of Vacant Commercial Premises, 2022–2023



Residential Premises

There is a significant amount of residential property within the main shopping centre in Bishop's Castle. In total, 148 residential premises are located in the audit area, of which the vast majority are either terraced houses or flats (115 or 79%). There are 49 flats which are largely located above retail or other commercial outlets. Much of this stock is along the High Street and Market Square. There are 66 terraced houses in the area (45% of all stock), much of which is along Church Street. There are small quantities of detached and semi-detached housing stock, most of which is towards the periphery of the main shopping area.

Map 9: Location of Residential Premises in Bishop's Castle Town Centre

Chart 21: Breakdown of Residential Properties by Type

