

Church Stretton: Town Centre Audit Analysis, 2023



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Introduction

An audit of businesses operating in Church Stretton'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. Church Stretton centre was first audited in August 2019 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

- 89 commercial units, occupying 12,500m² gross floor space
- The tenth largest shopping centre in Shropshire, accommodating for 3.5% of all Shropshire High Street traders
- Slightly higher than average number of stores per head of population at a rate of 189 units per 1,000 population (average of 13 for Shropshire)
- Average store size 141m²—close to the Shropshire average (147m²)
- 170 residential premises in the main shopping area, giving a ratio of 0.5:1 commercial versus residential properties
- Church Stretton had a 7% business churn rate in both 2020 and 2021, which was amongst the lowest in Shropshire. This almost doubled to 13% in 2022 before falling back slightly to 11% in 2023.
- 7% of all commercial premises were vacant in 2023—this is lower than the Shropshire average (11%) and is lower than anywhere else in the county except Much Wenlock
- Comparison retail accounts for more than a third of all commercial premises; many operators in this category—alongside the restaurants and public houses -add to the town's appeal as a visitor destination
- There are comparatively few retail services businesses operating in Church Stretton

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.

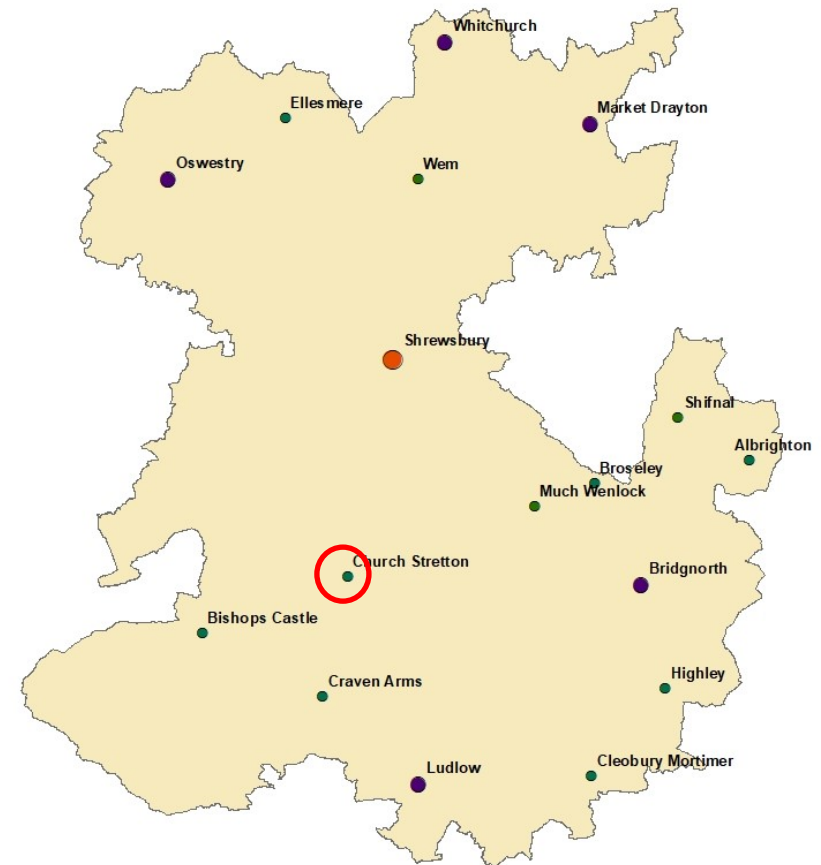
However, not all centres have comparable functions. Larger centres tend to attract workers and shoppers from much further afield than smaller centres, and consequently offer a much greater volume and variety of retail trade and consumer and business services.

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

Church Stretton is amongst the largest of the tier 3 retail centres, with 89 commercial outlets.

Map 1: Shropshire's Main Retail Centres



About Church Stretton

Church Stretton is a small market town located in the centre of Shropshire to the south of the county town, Shrewsbury, and to the north of Ludlow. The town developed as an Anglo-Saxon village, and today is an important tourism destination, being the only market town to fall entirely within the Shropshire Hills Area of Outstanding Natural Beauty. Church Stretton attracts considerable numbers of day trippers and overnight visitors as it provides ideal access to the Long Mynd and other neighbouring Shropshire Hills. 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 4,593 and 2,254 households (*2021 Census*). The town's population has declined by 1.7% since 2011. It is the thirteenth largest market town in the county and has one of the oldest demographic profiles in Shropshire.

The town is located on the A49, with Shrewsbury to the north (14 miles) and Ludlow to the south (16 miles). Church Stretton is on the national rail network on the Cardiff to Shrewsbury line. The total population within a 10 mile radius is approximately 35,800.

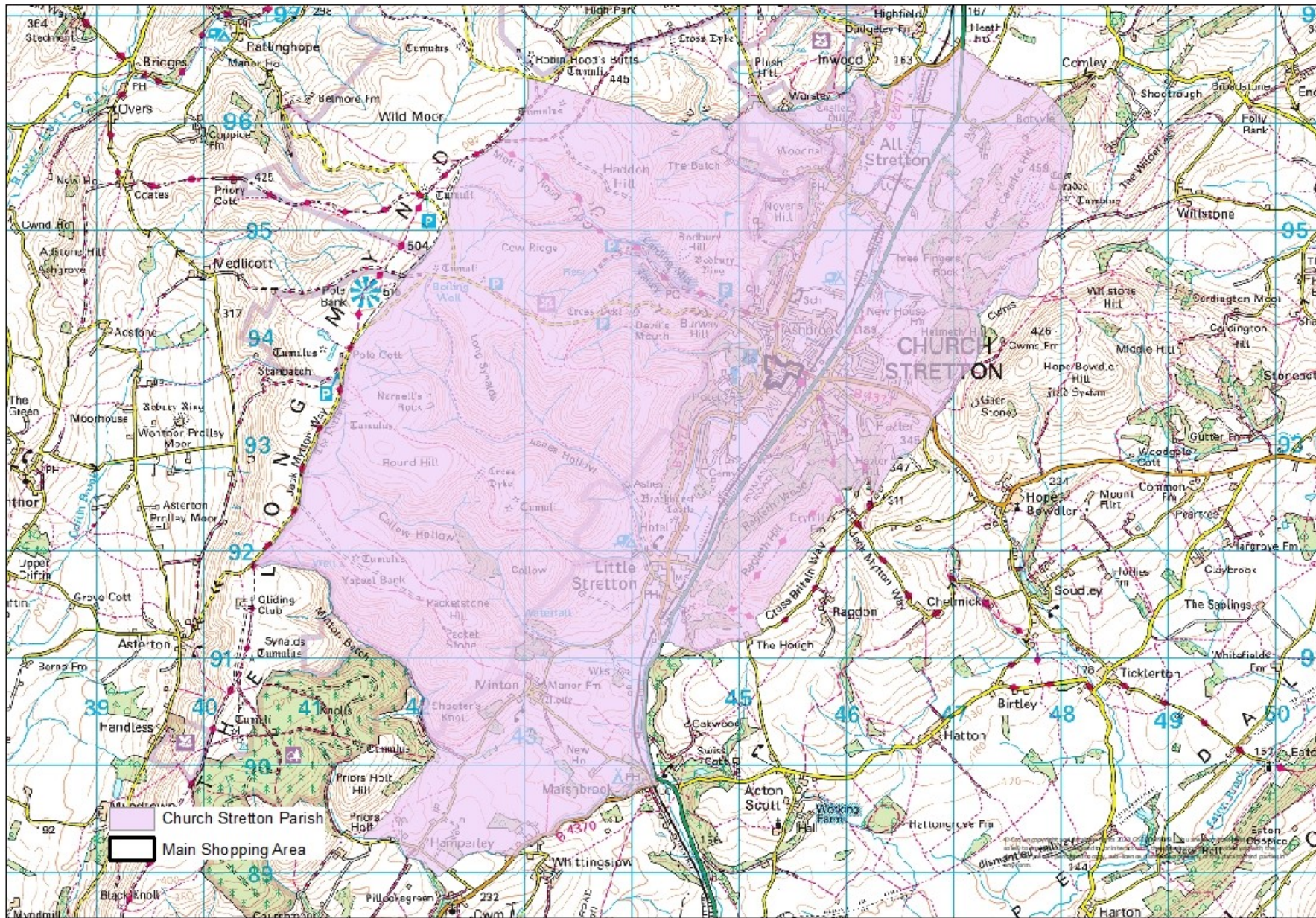
Church Stretton provides approximately 1,300 jobs across the town council area (*ONS Business Register and Employment Survey, 2022*). Key sectors include:

- Health (16.9% of jobs)
- Retail (16.1% of jobs)
- Arts, Entertainment & Leisure (13.0% of jobs)
- Accommodation and Food Services (10.7% of jobs)
- Education (10.0% of jobs)

Overall, Church Stretton town council area (depicted on Map 3) is large, covering an area of 3,132 hectares. The main shopping area (depicted on Map 4) is much smaller than this, at around 6 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. The weekly market is held in the Town Square every Thursday and Saturday.

Map 3: Church Stretton Town Council Area



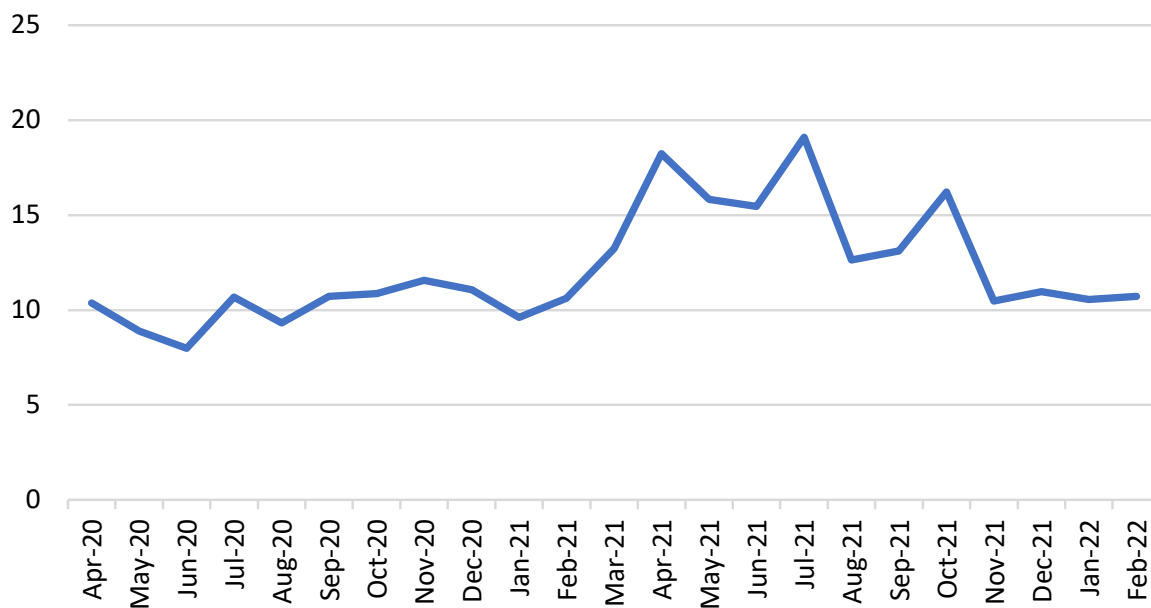
Catchment and Footfall

The map on the following page shows the main catchment for Church Stretton town centre. It covers the town itself and a small hinterland primarily to the north and south. Overall, the area includes seven postcode districts.

The total population within the catchment is 113,375 people which is smaller than the catchment for any of the other towns in Shropshire covered by the Town and Place AI tool except Much Wenlock and Bishop's Castle. The average catchment distance is relatively long, at 21.02 miles.

The chart below shows that percentage of the catchment population visiting Church Stretton at least once a month since April 2020. The conversion rate has ranged between 8% (June 2020) and 18.2% (April 2021).

Chart 1: Catchment Conversion (%)

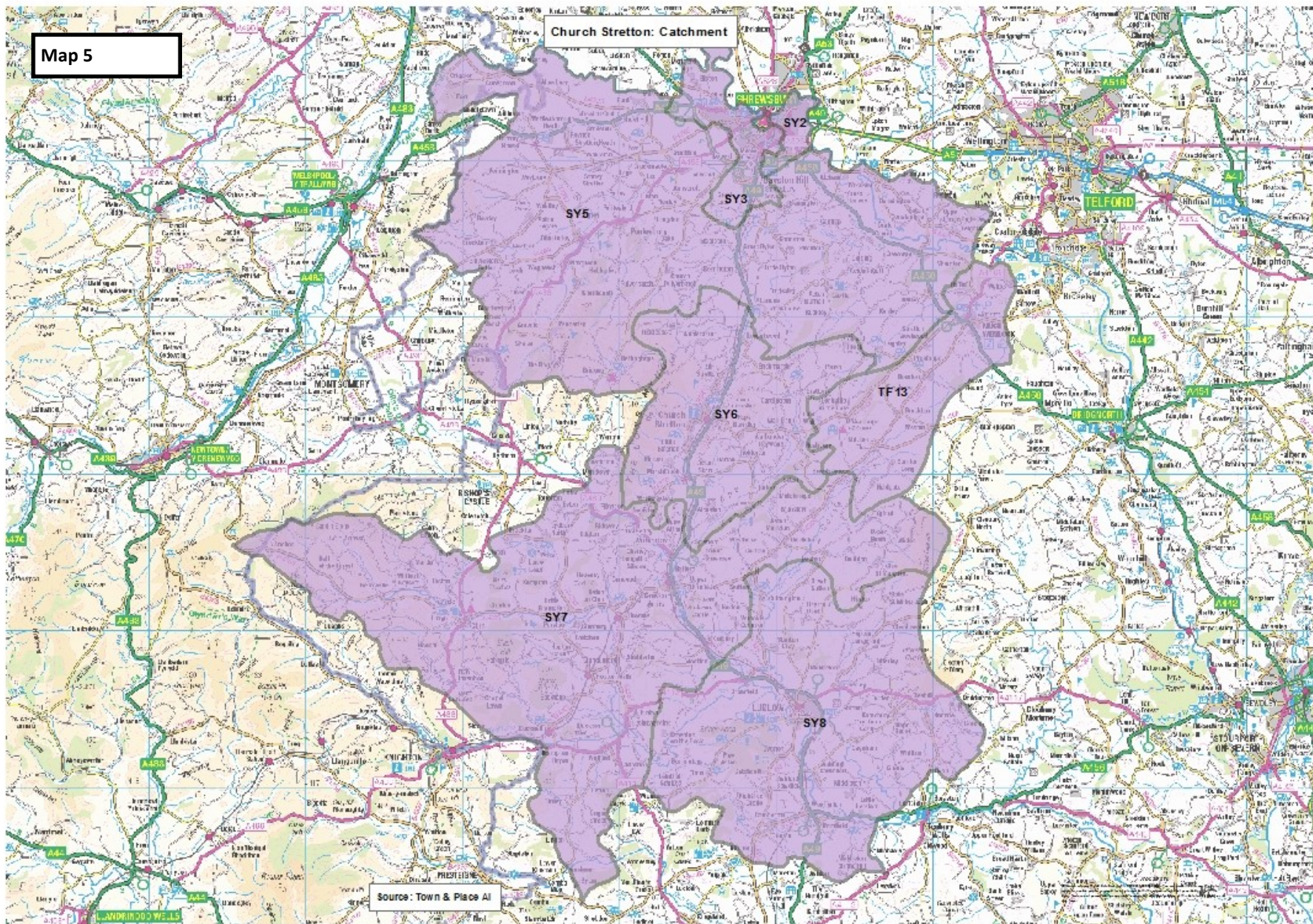


Source: Town & Place AI

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

Church Stretton: Catchment



Source: Town & Place AI

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

The overall catchment conversion stood at 10.7% in this month. However, this ranges from more than 70% in SY6 (in which the town is located) to less than 5% in SY2 and SY3, which are in Shrewsbury.

Overall, 54% of visitors to Church Stretton originated from the two postcode districts that make up the core catchment (SY6 and SY7). The remainder of the catchment accounts for 34% of visitors, with the remaining 12% representing visitors from further afield (classified as tourist). This reflects Church Stretton’s status as a tourism destination.

Chart 2: Breakdown of Visitors to Church Stretton, February 2022

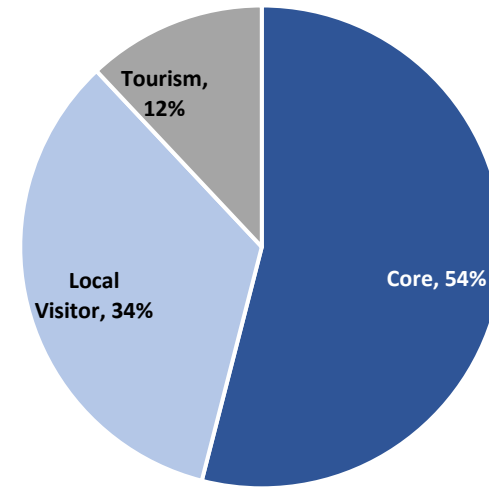
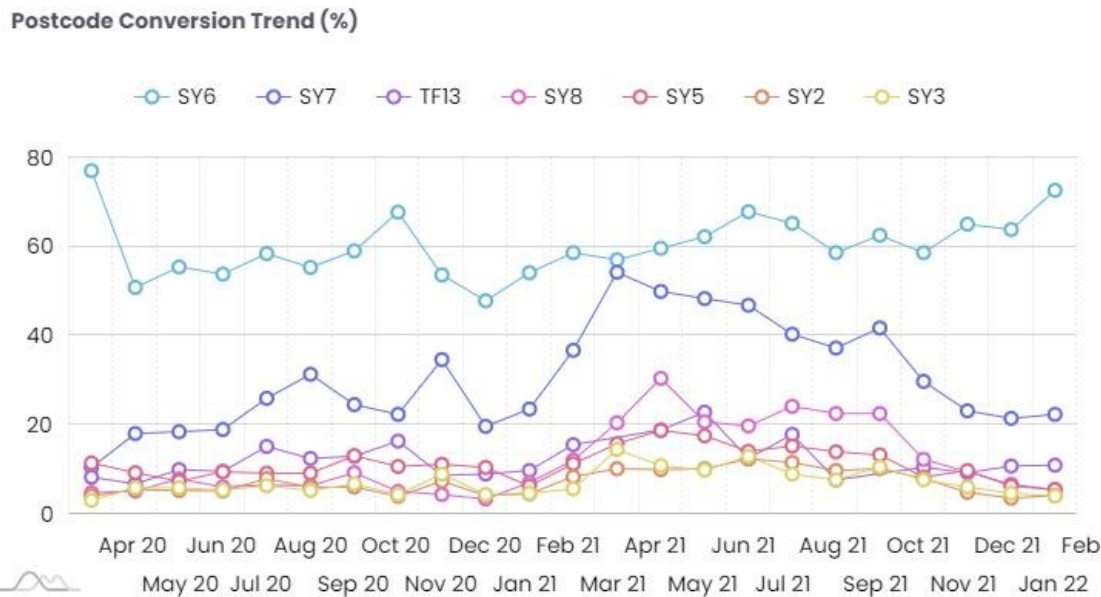


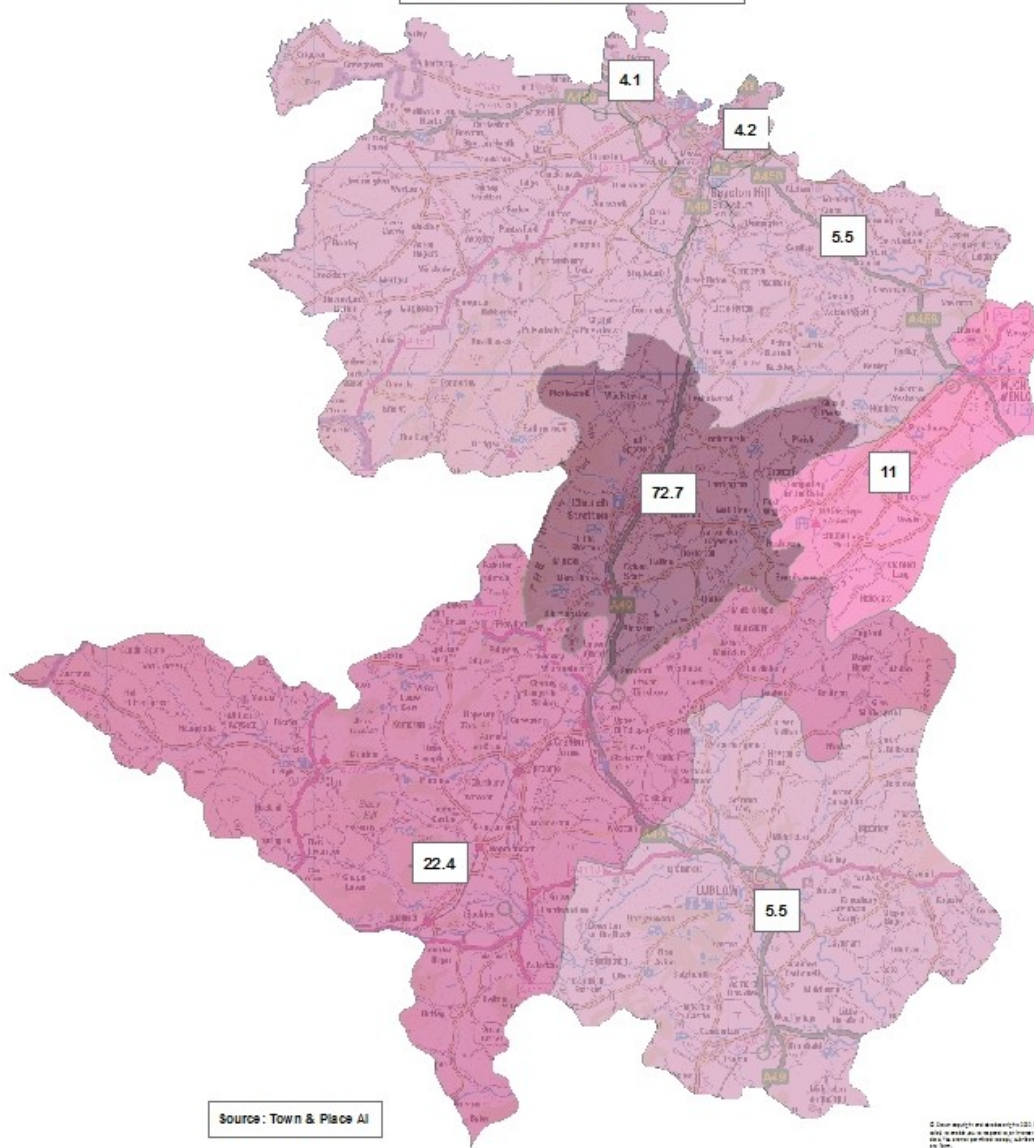
Chart 3: Trends in Church Stretton Postcode Conversion



The adjacent chart shows trends in postcode conversion of the Church Stretton catchment area. It shows that conversion from the core postcode district of SY6 has been consistently higher than any other and that it has been subject to fewer fluctuations. SY7, where the conversion rate is second only to SY6, has been subject to a much greater level of fluctuation.

Map 6

Church Stretton: Postcode Conversion
February 2022

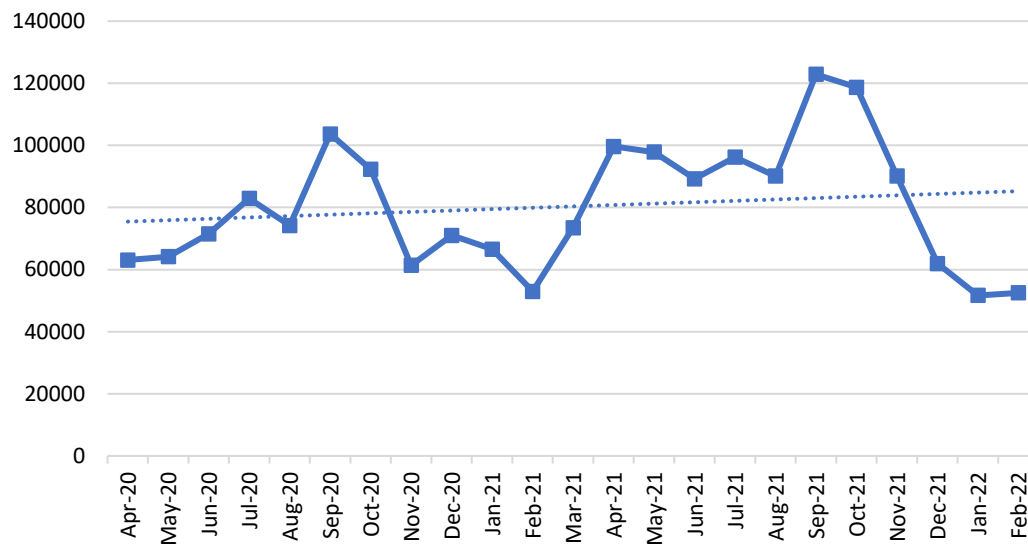


Source: Town & Place AI

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The following chart shows footfall in Church Stretton town centre from April 2020 to February 2022. . Overall footfall stood at 52,538 in February 2022, which represents a decrease of 1% over the same month in 2021. This bucks the trend amongst most Shropshire towns, which have seen a substantial increase in footfall over the last 12 months. It reflects the fact that the town is a relatively small retail destination, and that as the country has opened up following Covid-19 restrictions, residents may be travelling further afield for shopping trips. Footfall in the town is also very seasonal, with visits peaking in the summer months and dipping in the winter.

Chart 4: Trends in Footfall



Church Stretton attracted 22,942 unique visitors in February 2022, each of whom visited an average of 2.29 times to generate footfall of just over 52,500. The average dwell time was 33 minutes. The number of visits per unique visitor is down considerably compared with February 2021 (11.01 visits); lockdown restrictions will have inflated the number of visits to local destinations as residents sought to avoid unnecessary travel.

Alternative Shopping Destinations

Church Stretton primarily services its own local population, the postcode district SY6 but is also an important destination for visitors from the local area and from further afield. However, residents in this postcode are also frequent visitors to other nearby shopping centres which offer a greater choice of comparison retail and more leisure and hospitality opportunities. The charts below show the proportion of the SY6 postcode district which visited Shrewsbury, Ludlow and Bridgnorth in each month between April 2020 and February 2022. All three locations are just outside a 10 mile radius of Church Stretton (see map 2). It is clear that a very high proportion use nearby Shrewsbury which is easily accessible northwards via the A49. 43.6% of the SY6 population had visited Shrewsbury at least once in February 2022. In the same month, 27.3% had visited Ludlow, which is also easily accessible via the A49, albeit in a southerly direction. SY6 represents part of the core catchment for both Shrewsbury and Ludlow. Visits to both towns have increased significantly over the last year.

Chart 5: Shrewsbury

Postcode Conversion Trend (%)



Chart 6: Ludlow

Postcode Conversion Trend (%)



Visits to Bridgnorth are lower, with 6.4% of SY6 residents visiting in February.

Chart 7: Bridgnorth

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 89 commercial premises are located within the Church Stretton survey area. These are primarily in Sandford Avenue (32 premises) and High Street (28 premises), with a small number in Beaumont Road (7), Burway Road (6), Shrewsbury Road (5) and The Square (5) and surrounding streets. Gross floor space allocated to these businesses is over 12,500m² (almost two thirds in Sandford Avenue and High Street). The average store size is 141m² with units ranging in size from 20m² to 1,500m². Outside of Shrewsbury and the main Shropshire market towns (Oswestry, Market Drayton, Whitchurch, Ludlow, Bridgnorth), Church Stretton has a relatively broad offering within the main shopping zone.

There was no change in the number of commercial premises in Church Stretton between 2019 and 2021. Between the 2021 and 2023 audits, there has been some consolidation, with one unit taking over two adjacent premises to form one larger store in 2022. An additional commercial premise was identified in 2023 taking the number to 89.

The highest proportion of commercial units are allocated to comparison retail (36%). They account for a slightly smaller share of floor space (33%). Convenience retail accounts for only a small share of units (8%) but for the second highest proportion of floor space (19%). 15% of units are attributable to restaurants and takeaways, while one in ten are filled by a financial/professional/business services operator. A relatively small number of retail service businesses operate in the town (10% of units accounting for 6% of floor space). Small numbers of units are filled by tourism & leisure operators and other types of organisations (including a police station and a fire station).

There are six vacant premises in Church Stretton, including two on the High Street and one each on Burway Road, Easthope Road, Sandford Avenue and The Square which together account for 7% of units, which is the equivalent of 10% of floor space.

Chart 8: Number of Stretton Commercial Premises, 2019 –2023

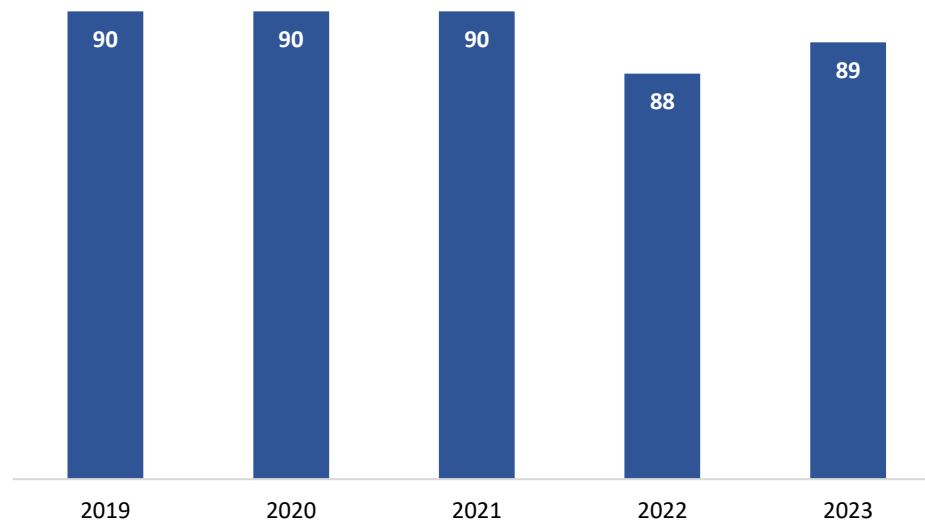


Chart 9: Breakdown of Church Stretton Commercial Premises by Classification, 2023

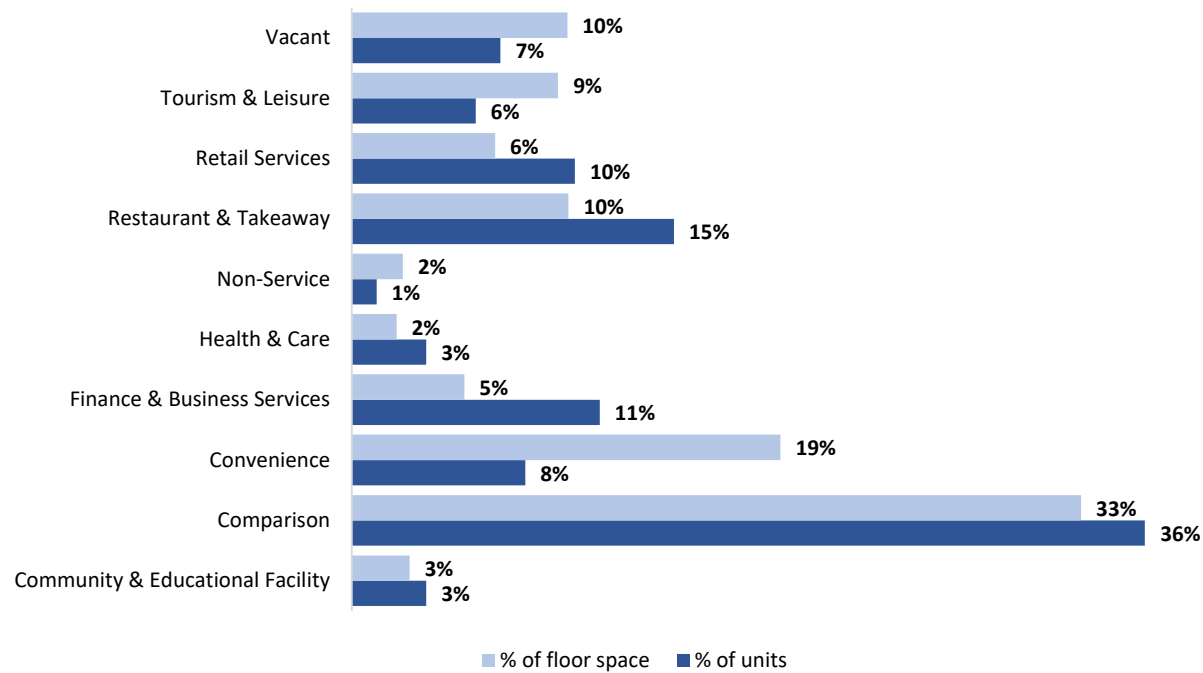
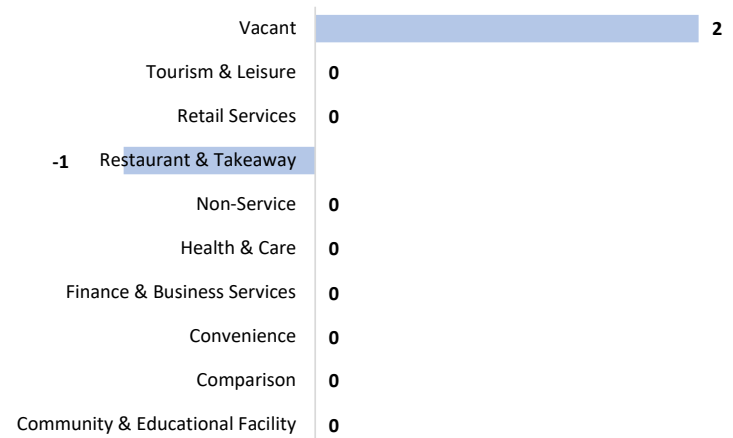


Chart 10: Change in Number of Units by Category, 2022/23

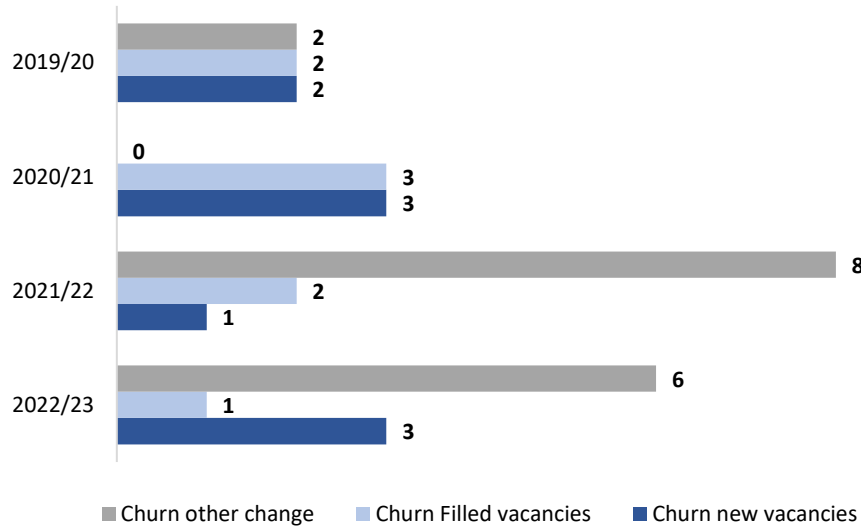


Change since 2022

There has been only minimal change in the mix of businesses operating in Church Stretton between 2019 and September 2023. Overall, business turnover in Church Stretton has been amongst the lowest in Shropshire over the last four years at 7% in 2019/2020 and 2020/21 before rising to 13% in 2022 and to 11% in 2023.

Between 2022 and 2023, there was one fewer restaurant/takeaway and the number of vacant units rose by two. There was no other change in the number of units operating in each sector.

Chart 11: Breakdown of Business Churn 2019-2023



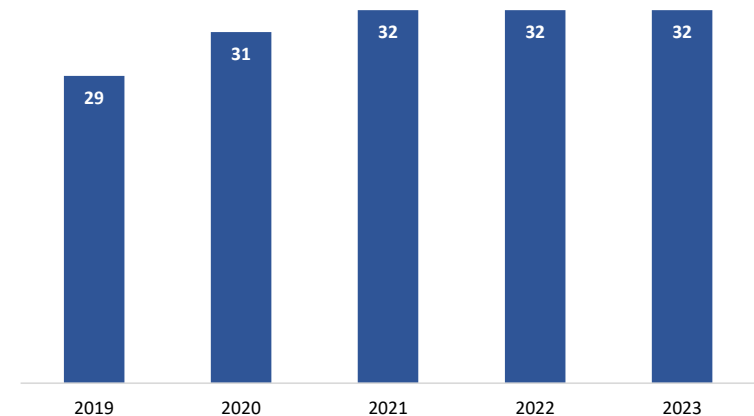
Business churn in Church Stretton in 2020 (compared with 2019) was split evenly between new vacancies arising, old vacancies being filled and other change that had occurred since the previous audit. In 2021, three formerly vacant units were filled, while three new premises became vacant. There was no other change.

This situation was reversed between the 2021 and 2022 audits, with one new vacancy, two previously vacant premises becoming filled (one by the extension of a comparison retailer) and all other churn being attributable to change involving change of use, hands or a significant rebrand (73% of all churn). Other change continued to account for the major share of churn in 2023 (60%) while new vacancies out-numbered filled vacancies by three to one.

Comparison Retail

The largest proportion of commercial units and the largest proportion of floor space is dedicated to the comparison retail category in Church Stretton, accounting for over a third of units (36%) and for a slightly smaller share of gross floor space (33%). This equates with 32 stores with over 4,000m² of floor space. More space is allocated to comparison goods in Church Stretton than in any other Shropshire town except Ludlow and the offer has grown since 2019, with the number of units increasing from 29. Although the number has remained flat since 2021, floor space rose slightly with the expansion of one store to include an additional two adjacent units in 2022. This bucks the Shropshire trend, as the comparison sector has been the main casualty of store closures across most of the county. Many of the operators in this field support the town’s tourism offer.

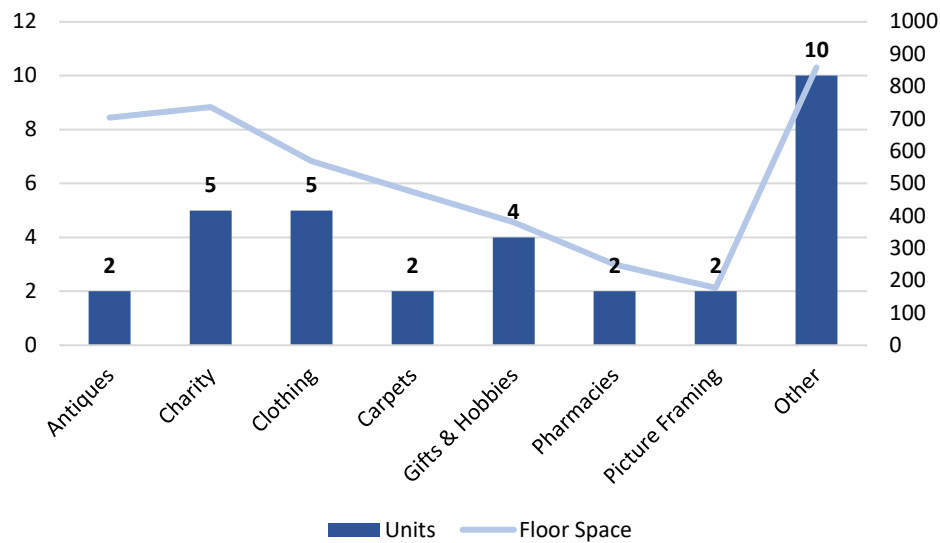
Chart 12: Number of Comparison Retail Stores, 2019—2023



Within the town there are five charity shops, five clothing/shoe shops plus four stores selling gifts and/or hobby and craft products. There are also two antique stores (which together account for a disproportionately large share of floor space), two pharmacies, two carpet shops and two picture framers. All other classification types are represented by just one store. These include a stationers, a book store, a florist, an outdoor goods store, a DIY shop, a toy shop, a motorised scooter retailer, a mobile phone store and a photographic equipment store. The classification also includes a general store/hardware shop, which expanded in 2022 to included a store which was vacant as well as a former knitwear store.

There has been no change in the comparison mix since 2022, although the outdoor goods store relocated to larger premises. One of the craft/gift stores also relocated, while another changed owner/name.

Chart 13: Breakdown of Comparison Retail by Type, 2023



The majority of stores are independent, although the town is home to Rowlands pharmacy and Get Connected mobile phone store and to several charity stores that form part of either local or national chains (Hope House, Severn Hospice and British Red Cross).

Convenience Retail

There are seven convenience stores within the main shopping area of Church Stretton. These account for 8% of all units and for 19% of gross floor space. There has been no change in the convenience retail offer in Church Stretton since 2022, when one of the town's butchers closed. This has been the only change in the number of convenience operators since 2019.

Chart 13: Number of Convenience Stores, 2019 - 2023

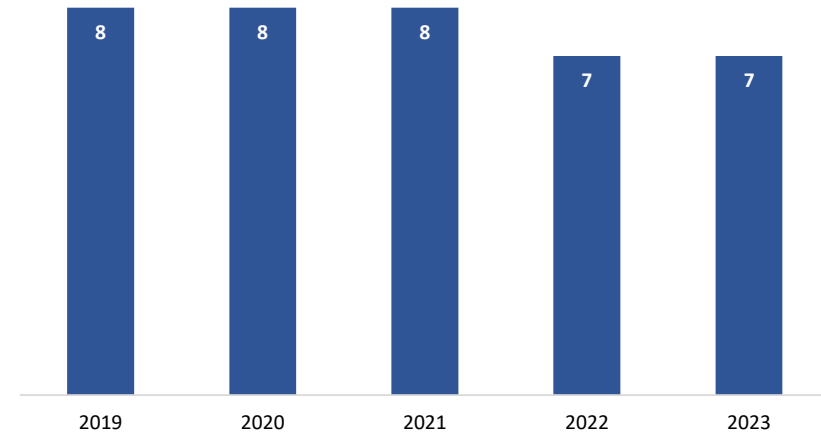
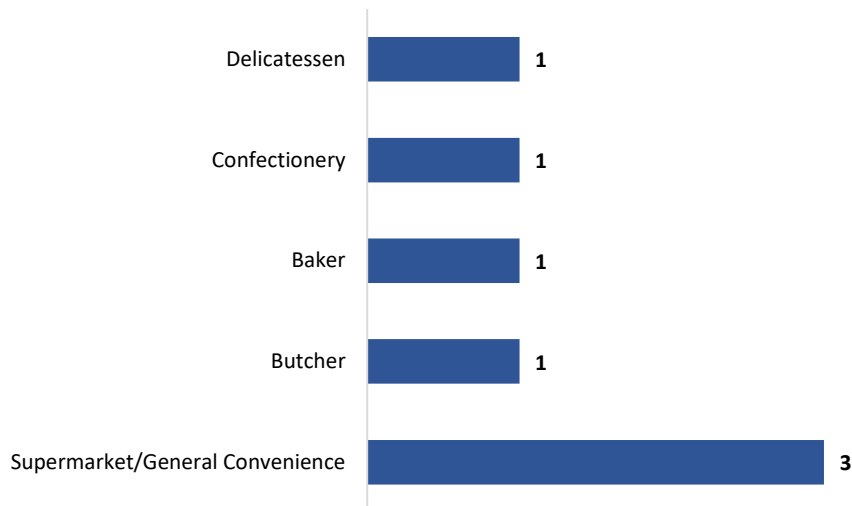


Chart 14: Number of Convenience Stores by Type, 2023



As well as a supermarket (the Co-op), there are two other general food stores, a butcher, a bakery, a delicatessen and a confectioners. There was no change in offer in 2023, although the delicatessen changed owner/branding.

Apart from the Co-op, which is the largest store in Church Stretton, other operators in the convenience retail sector are independent.

Restaurants & Takeaways

15% of units in Church Stretton are attributable to restaurants and takeaways, with this category accounting for a slightly lower proportion of gross floor space (10%). The number of units operating in the sector has fluctuated between 12 and 14 since 2019. The restaurant sector was boosted in 2022 with the opening of a restaurant. A new takeaway also opened, but this was offset by the closure of another. The number of units fell by one in 2023 with the closure of the restaurant that had opened in 2022.

Chart 16: Breakdown of Units in the Restaurant/Takeaway Sector, 2023

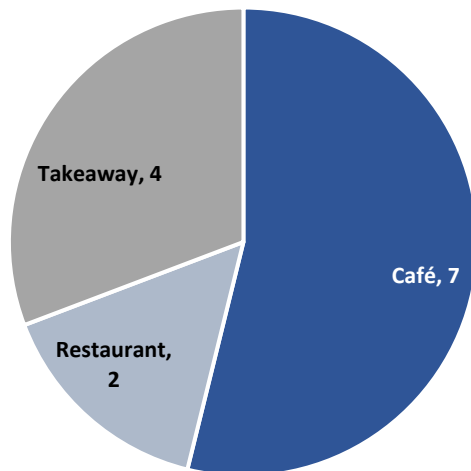
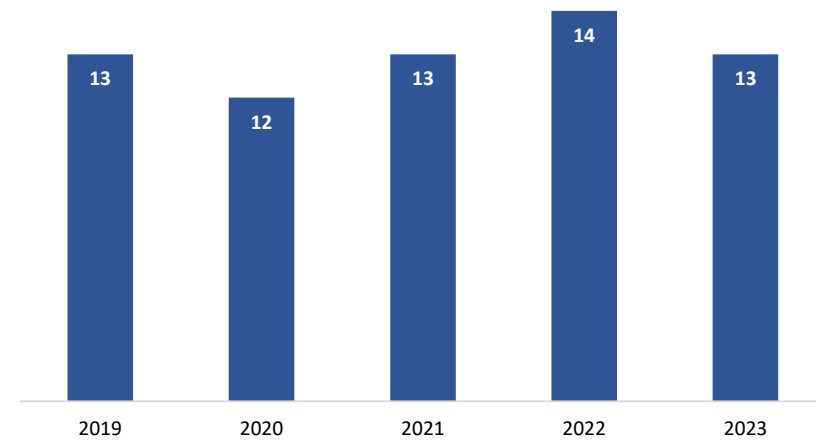


Chart 15: Number of Restaurants/Takeaways, 2019 - 2023



The 13 units are split between cafés (54%), restaurants (15%) and takeaways (31%). Both of the Church Stretton restaurants are Asian. In terms of takeaways, there is fish and chips, Chinese and a kebab shop. One of the Chinese takeaways opened in 2023, although a sandwich shop closed.

There are no chain stores in the restaurant and takeaway category in Church Stretton.

Tourism & Leisure

Also within the hospitality sector, there are three public houses. These take up approximately 720m² gross floor space. There is also a B&B located in the town centre as well as an art gallery.

There was no change in the tourism offer in Church Stretton in 2023.

Chart 17: Breakdown of Units in the Tourism/Leisure Sector, 2023

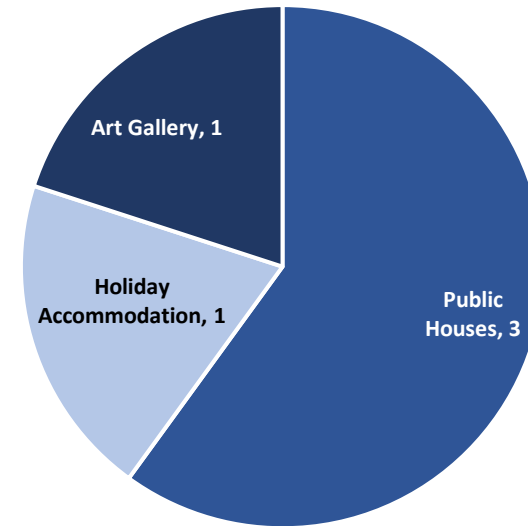
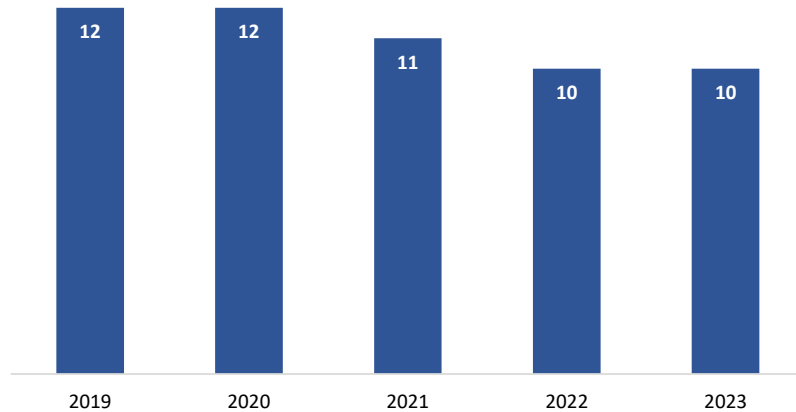


Chart 18: Number of Financial & Business Services Units, 2019-2023



Finance & Business Services

There are 10 commercial operators in the finance and business services category in Church Stretton town centre, accounting for over 600m² of gross floor space. The number has fallen from 12 in 2019, with the loss of one unit in both 2021 and 2022. There was no further change in 2023.

Included within this classification are four estate agents (including a letting and property management company), two solicitors, two accountants, a financial adviser and a vet. The branch of the TSB bank that was in the town has closed and is now vacant. The premise of the former branch of Barclays is now occupied by an outdoor goods store. Consequently, there are no longer any banking services in the town.

Health

There are two dental practices within the main retail zone in Church Stretton and a chiropody clinic.

Retail Services

There are nine retail service businesses operating in Church Stretton town centre, with these accounting for more than 800m² of gross floor space. This category is under-represented in Church Stretton compared with other Shropshire towns of a similar size. This may suggest that a sizeable proportion of Church Stretton residents travel to nearby Shrewsbury for retail service provision.

There is one fewer operator in the retail services classification than there was in 2021 with the loss of a hair salon but no further change in numbers in 2023.

Chart 19: Breakdown of Financial /Business Services Businesses by Type, 2023

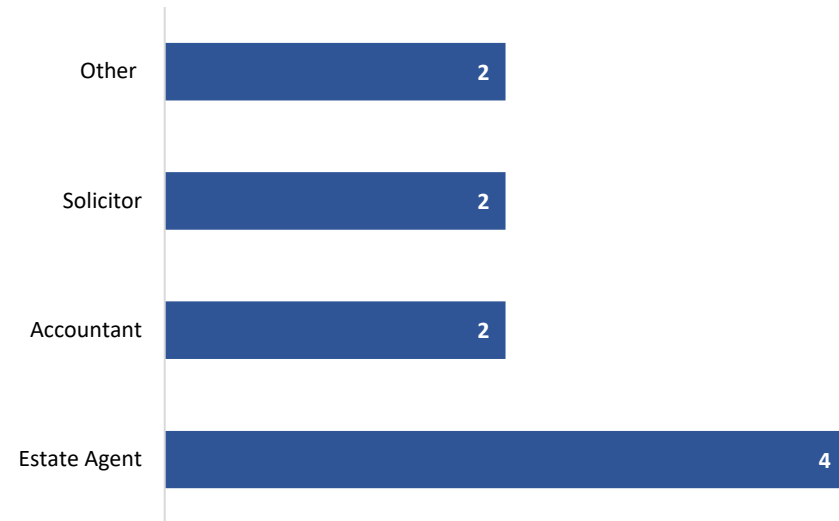


Chart 20: Number of Retail Services Businesses, 2019-2023

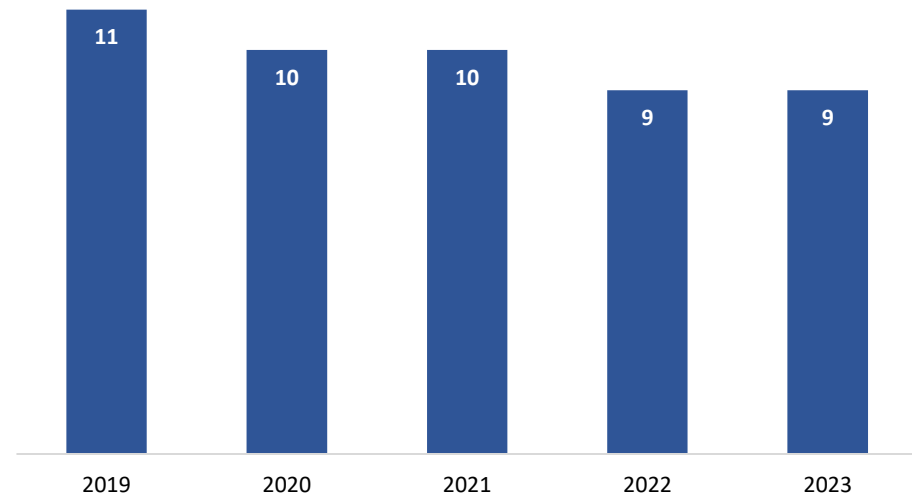
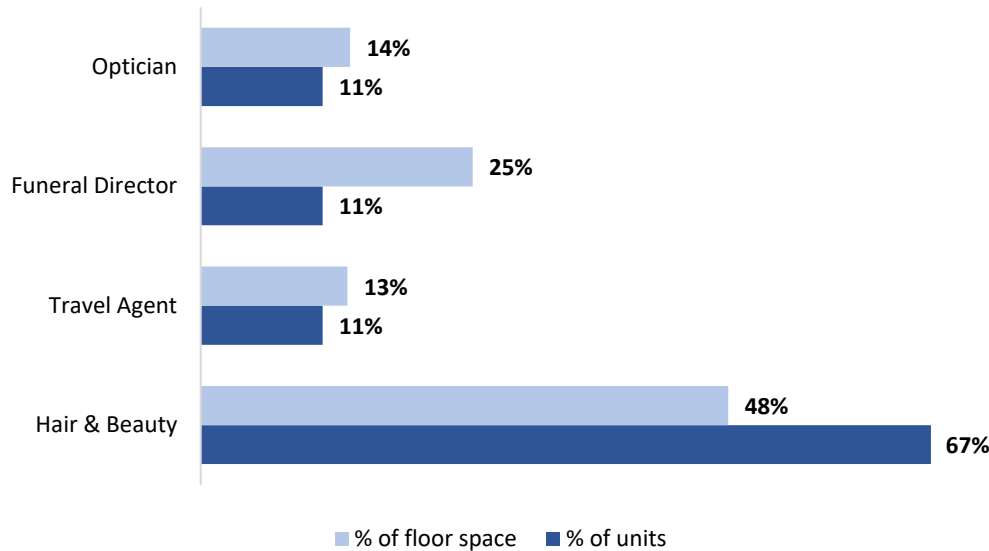


Chart 21: Breakdown of Retail Services Businesses by Type, 2023



The highest number of operators are in the barber and hair & beauty salon classification, with these together representing 67% of units and 48% of floor space. In addition, there is an optician, a travel agent, and a funeral director.

There has been no change in the retail services offer in 2023.

Vacant Units

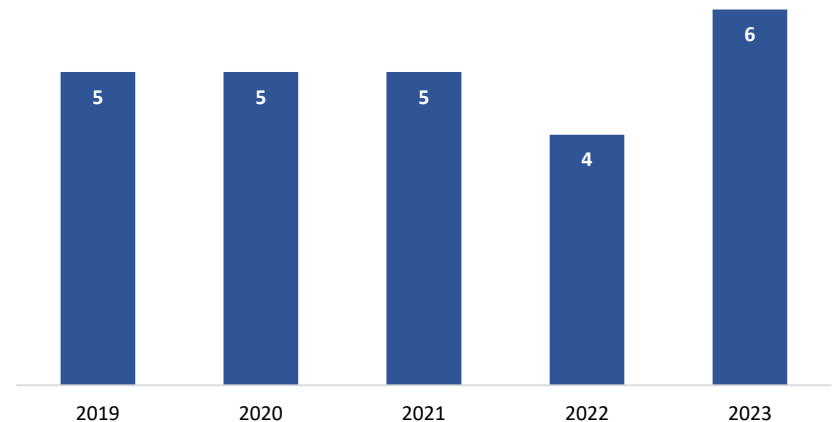
7% of Church Stretton town centre outlets are vacant (10% of gross floor space) which equates with six premises. This is significantly below the average for Shropshire, which stood at 11% in 2023. The vacancy rate is much lower than the average nationally, which stood at 13.9% in the second quarter of 2023 according to BRC (data relating to high streets only).

The number of vacant units in Church Stretton rose by two 2023 and has ranged between four and six between 2019 and 2023.

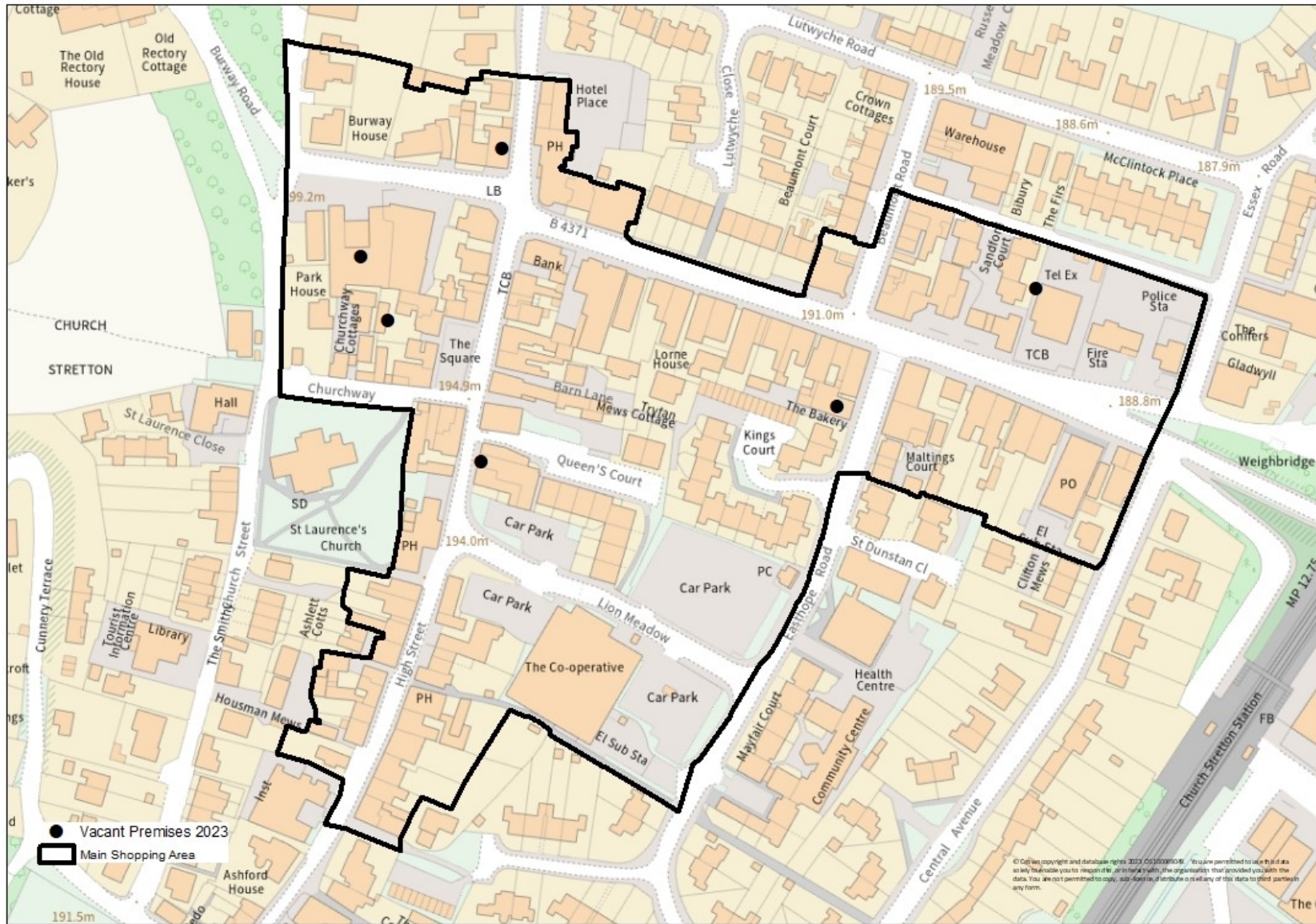
Two of the vacant premises are on the High Street, and one each in the Square, Burway Road, Sandford Avenue and Easthope Road.

Of the six premises that were vacant in 2023, half had become vacant during the previous year. One unit has been empty since at least 2019.

Chart 22: Number of Vacant Commercial Units, 2019-2023



Map 7: Location of Vacant Commercial Premises, 2023



Residential Premises

There is a significant amount of residential property within the main shopping centre in Church Stretton. In total, 170 residential premises are located in the audit area, of which the vast majority are flats (125 or 73%) which are largely located above retail or other commercial outlets. Much of this stock is along Sandford Avenue and the roads adjacent to the main car park. There are small quantities of detached, semi-detached and terraced housing stock, most of which is towards the periphery of the main shopping area. The amount of housing stock in the area has reduced by two since 2022.

Map 9: Location of Residential Premises in Church Stretton Town Centre

Chart 23: Breakdown of Residential Properties by Type

