

Much Wenlock: Town Centre Audit Analysis, 2023



Introduction

An audit of businesses operating in Much Wenlock'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. Much Wenlock 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

- 47 commercial units, occupying 4,900m² gross floor space
- One of the smallest high street shopping zones (just Highley, Cleobury Mortimer and Broseley smaller), accounting for 1.8% of all Shropshire High Street traders
- Average number of stores per head of population at a rate of 14 units per 1,000 population (average of 13 for Shropshire)
- Average store size 103m² which is notably smaller than the average across Shropshire (147m²) and the second smallest in Shropshire
- 108 residential premises in the main shopping area, giving a ratio of 0.4:1 commercial versus residential properties
- Much Wenlock had a 13% business churn rate in 2023, which represents an increase from 9% in 2022, 4% in 2021 and 6% in 2020. Overall churn since 2019 is the lowest in Shropshire.
- The vacancy rate, at just 2%, is the lowest in Shropshire (county average 11%)
- The highest proportion of commercial units is attributable to comparison retail (32%) with convenience also accounting for a high share (15%)
- In contrast, there are comparatively retail service businesses (11% of units)

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.

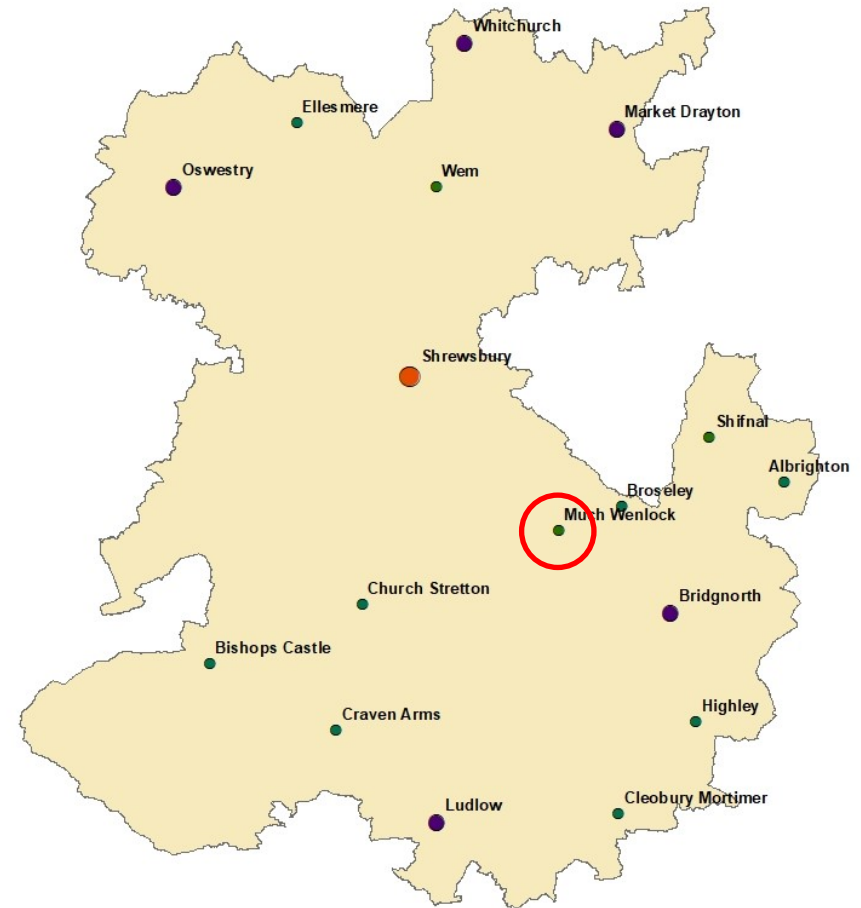
However, not all centres have comparable functions. Larger centres tend to attract workers and shoppers from much further afield than smaller centres, and consequently offer a much greater volume and variety of retail trade and consumer and business services.

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

Much Wenlock is amongst the smallest retail centres, but nonetheless has a broad selection of commercial operators trading.

Map 1: Shropshire's Main Retail Centres



About Much Wenlock

Much Wenlock is a small medieval market town located between Shrewsbury and Bridgnorth. The town developed around the abbey, which was built in around 685 AD. This remained until the invasion of Danish Vikings around 874 AD. In the 11th century a religious house was built on the same site. This was subsequently replaced by a monastery following the Norman Conquest. The town and monastery prospered until the dissolution of monasteries in 1539. The ruins of the site can still be seen today. Much Wenlock is located alongside Wenlock Edge, which is a limestone escarpment which runs from Craven Arms to Ironbridge. Today the town has a population of 2,908 and 1,345 households (*2021 Census*). Its population has increased marginally (by 1.1%) since 2011.

Much Wenlock is located alongside the A458, which provides access northwards to Shrewsbury (15 miles) and southwards to Bridgnorth (8 miles). Local roads provide access to Telford (12 miles) from where motorway connections can be made. There is no mainline railway connection—the nearest station is Telford Central.

The total population within a 10 mile radius is approximately 200,000.

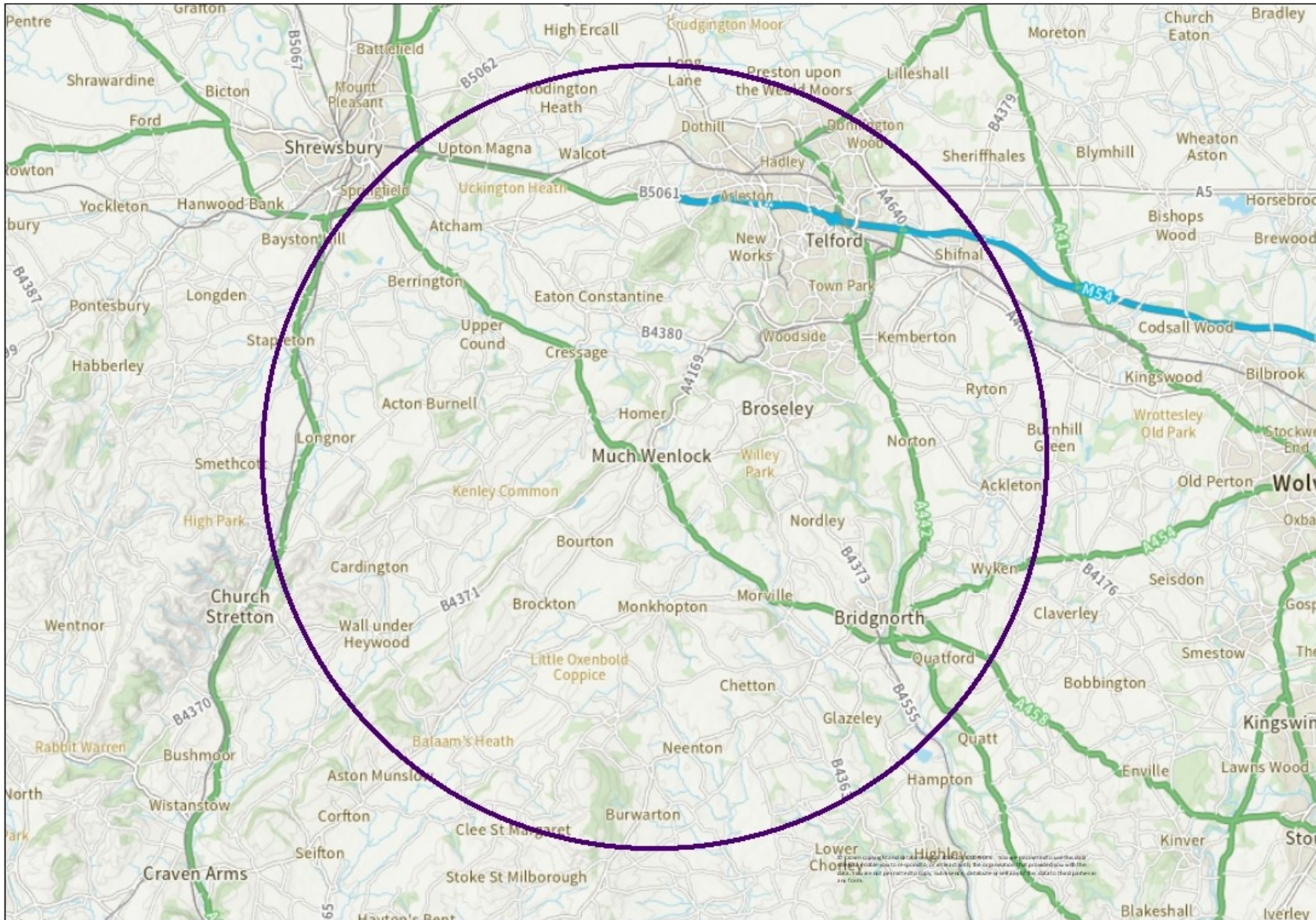
Much Wenlock provides approximately 1,100 jobs across the town council area (*ONS Business Register and Employment Survey, 2022*). A significant proportion of local residents work outside the immediate local area, and as such the town is not one of Shropshire's key employment hubs. Key sectors include:

- Education (16.6% of jobs)
- Health (15.7% of jobs)
- Accommodation & Food Services (12.9% of jobs)
- Manufacturing (8.3% of jobs)

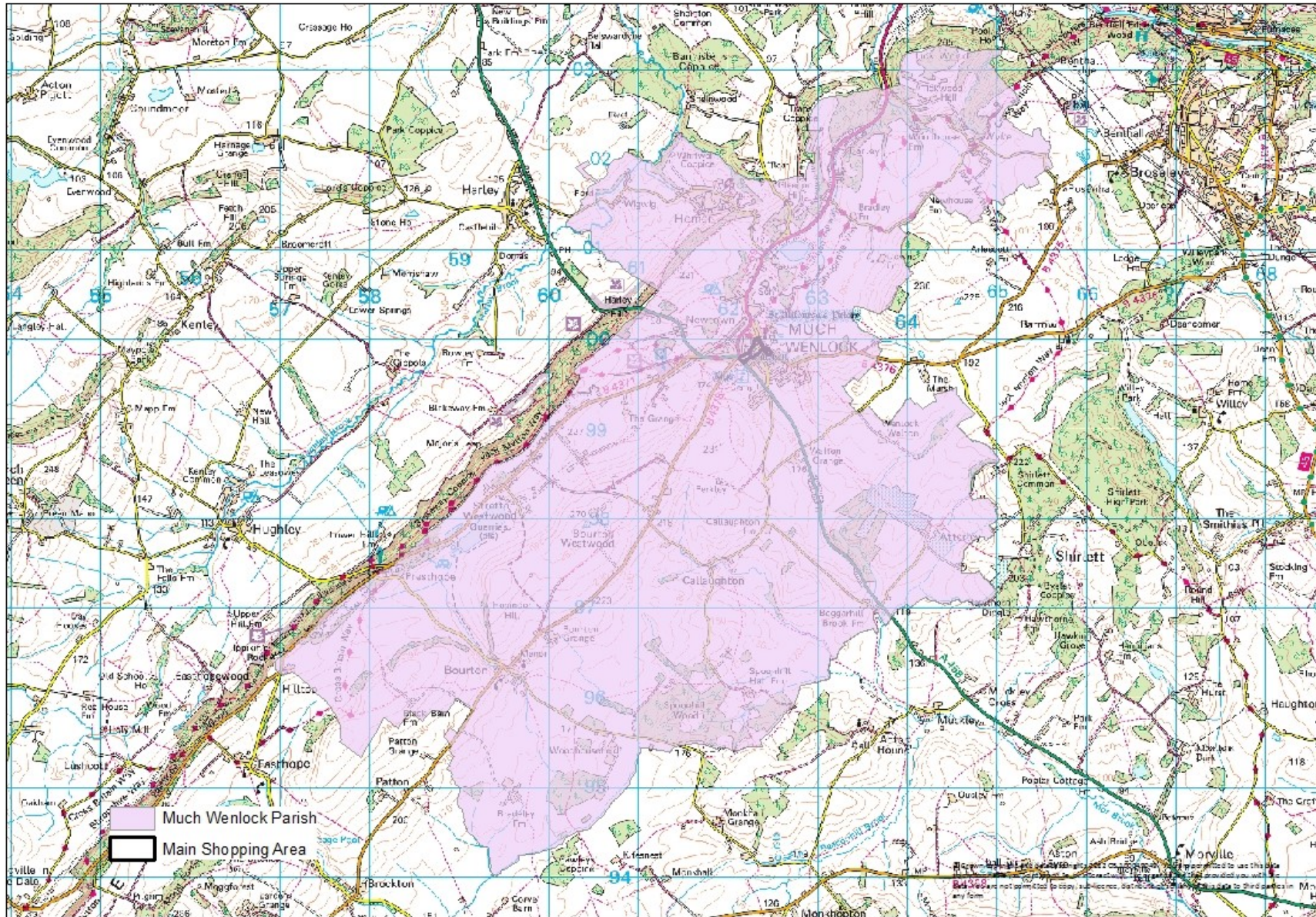
Overall, Much Wenlock town council area (depicted on Map 3) covers a large predominantly rural area of 3,540 hectares. The main shopping area (depicted on Map 4) is much smaller than this, at around 3 hectares.

The town comprises predominantly independent retail and there is a significant amount of residential housing stock in the main shopping area of the town.

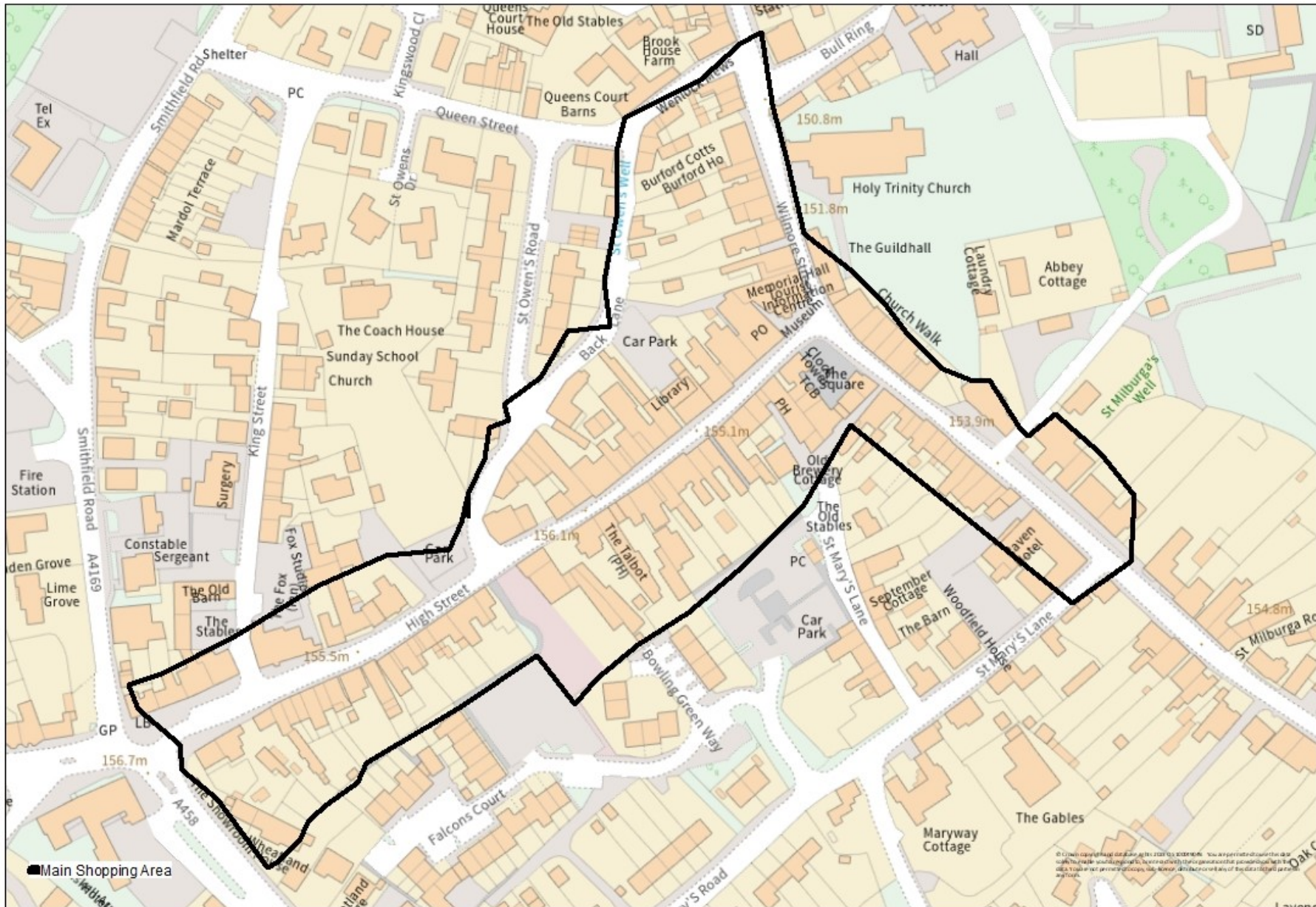
Map 2: Location of Much Wenlock showing 10 mile radius



Map 3: Much Wenlock Town Council Area



Map 4: Main Retail Shopping Area



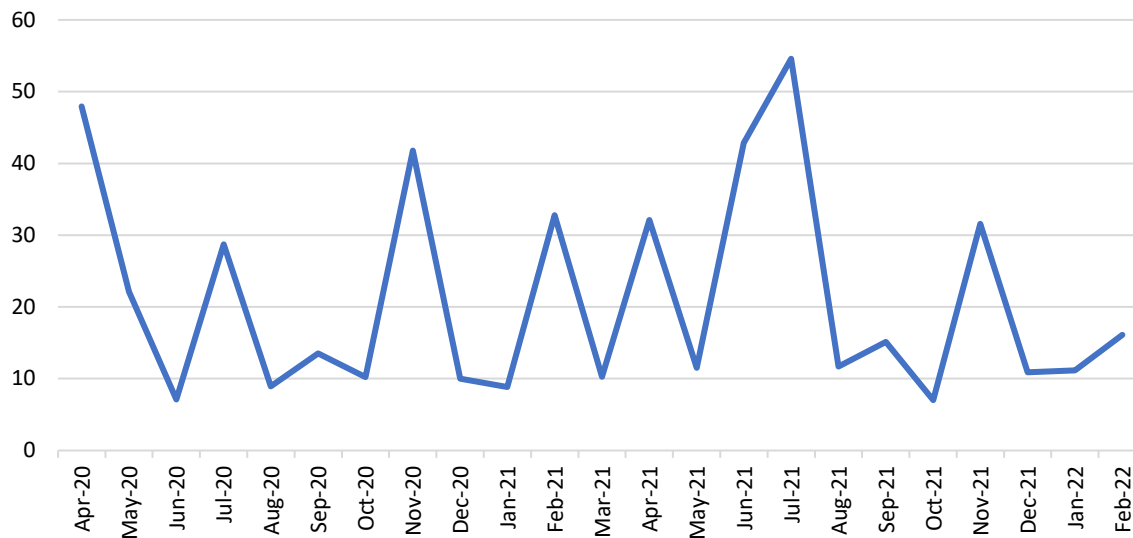
Catchment and Footfall

The map on the following page shows the main catchment for Much Wenlock town centre. It covers the town itself and stretches westwards towards Church Stretton. Overall, the area includes three postcode districts.

The total population within the catchment is 15,859 people which is smaller than the catchment for any of the other towns in Shropshire which Town & Place AI covers. The average catchment distance is around average for the county at 11.14 miles.

The chart below shows the percentage of the catchment population visiting Much Wenlock at least once a month since April 2020. The conversion rate has ranged between 7.1% (June 2020) and 47.9% (April 2020). This extreme fluctuation in the conversion rate will be dependent on which postcodes are categorised as the town's core catchment, which varies on a month-by-month basis depending on the level of conversion for surrounding postcode districts. The fluctuation is captured in the chart below.

Chart 1: Catchment Conversion (%)

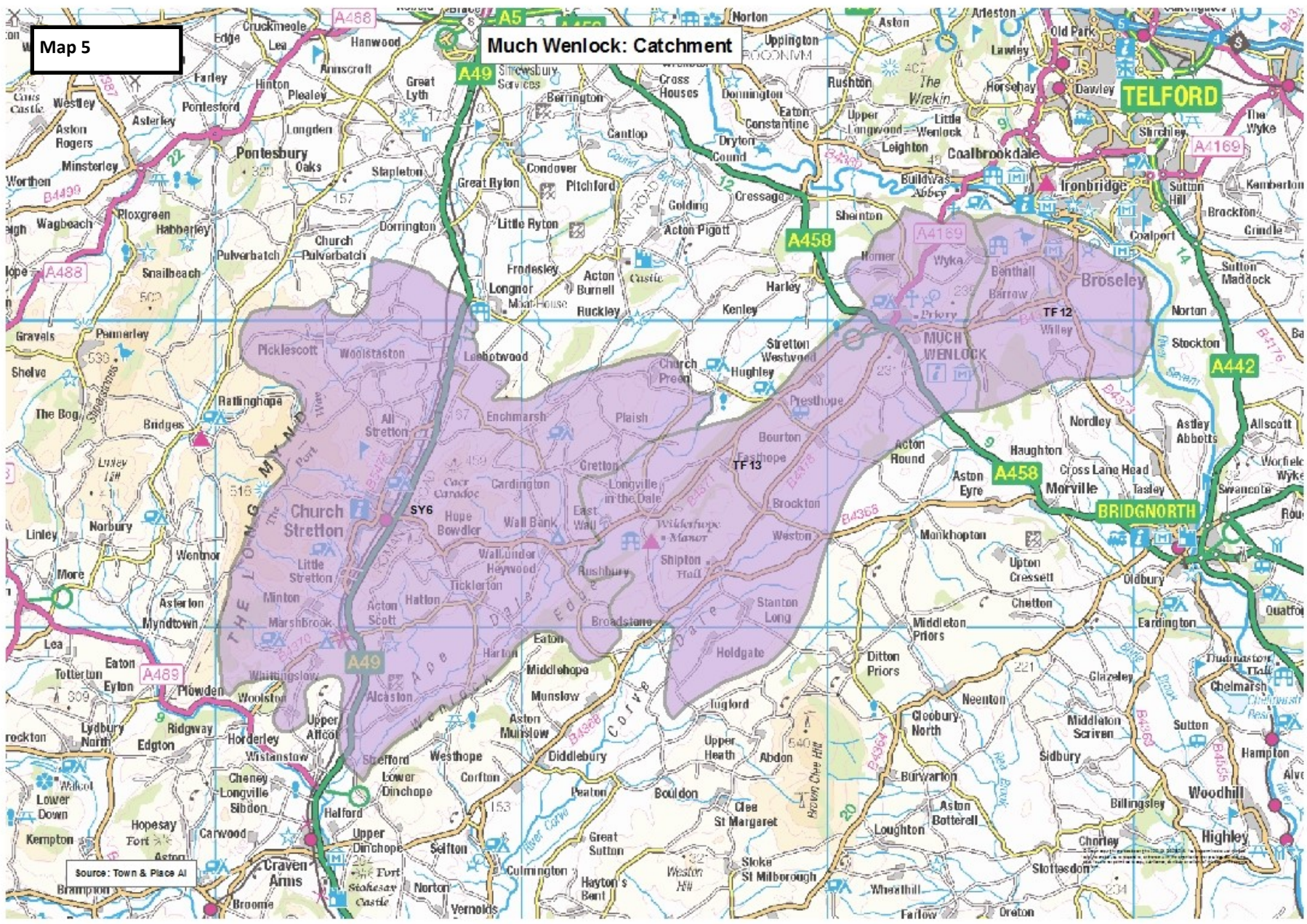


Source: Town & Place AI

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

Much Wenlock: Catchment



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

The overall catchment conversion stood at 16.1% in February 2022. However, this ranges from a third in TF13 to less than 5% in SY6. The town itself is in TF13.

Overall, 63% of visitors to Much Wenlock originated from the two postcode districts that make up the core catchment (TF12 and TF13). This proportion is relatively high. The remainder of the catchment accounts for 6% of visitors, which is low. The remaining 31% represents visitors from further afield and indicates that the town is an important attractor of tourists.

Chart 2: Breakdown of Visitors to Much Wenlock, February 2022

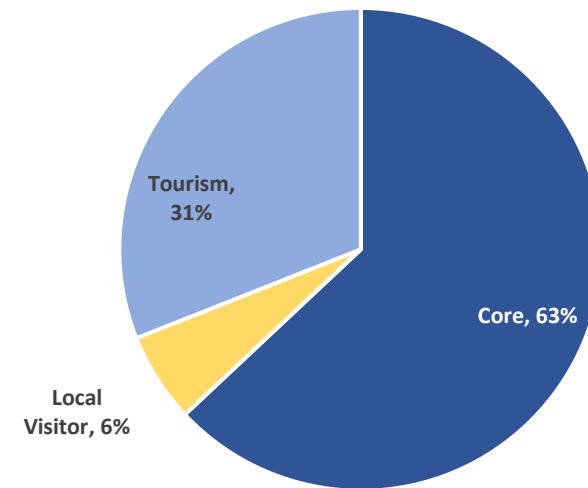
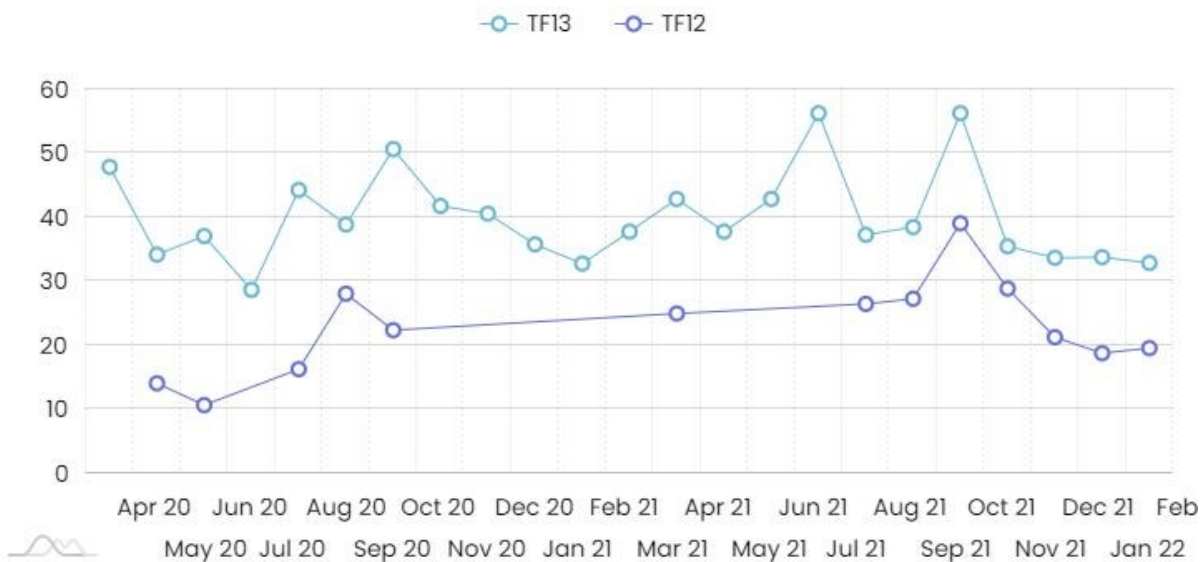


Chart 3: Trends in Much Wenlock Postcode Conversion

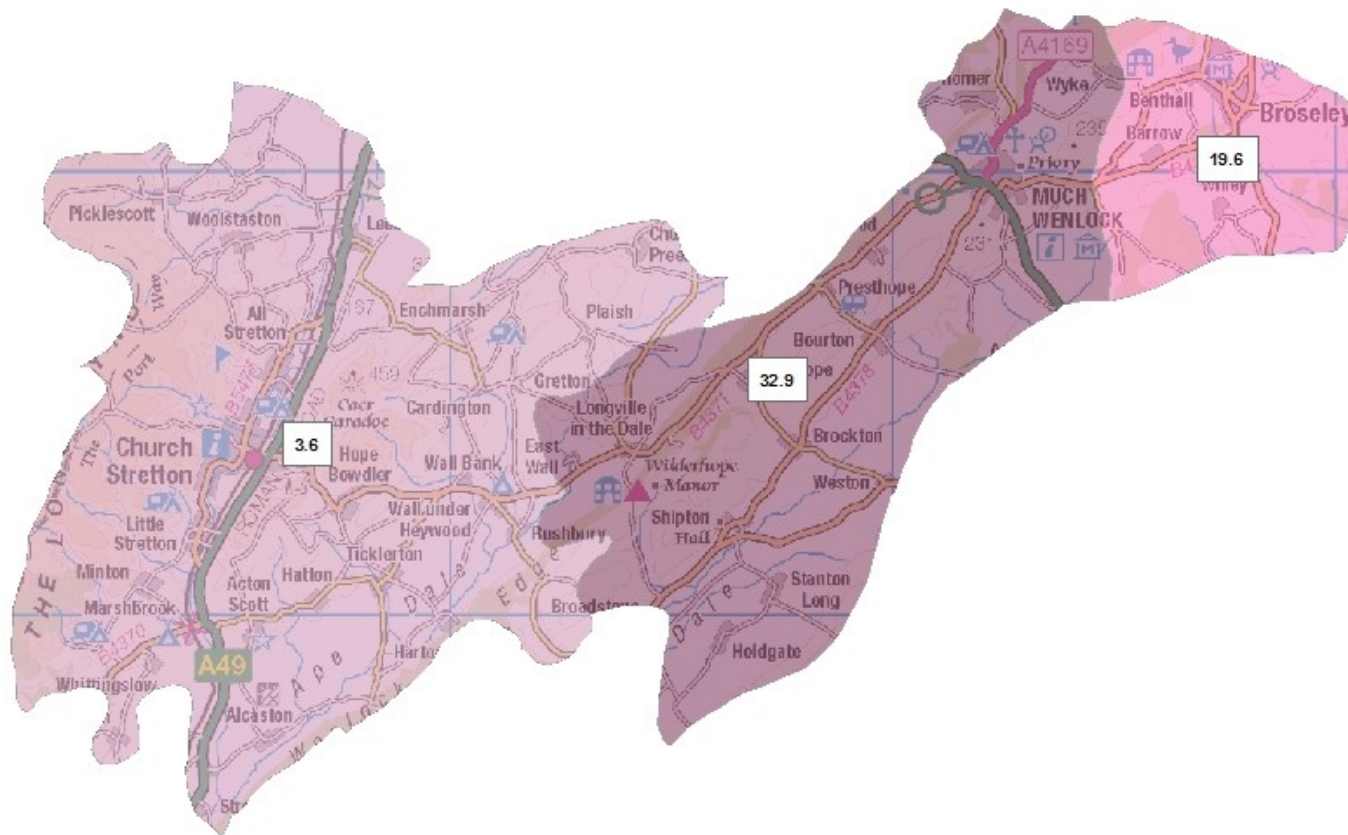
Postcode Conversion Trend (%)



The adjacent chart shows trends in postcode conversion for the Much Wenlock core catchment area. It shows that conversion from the core postcode districts TF12 and TF13 have followed similar trends since April 2020.

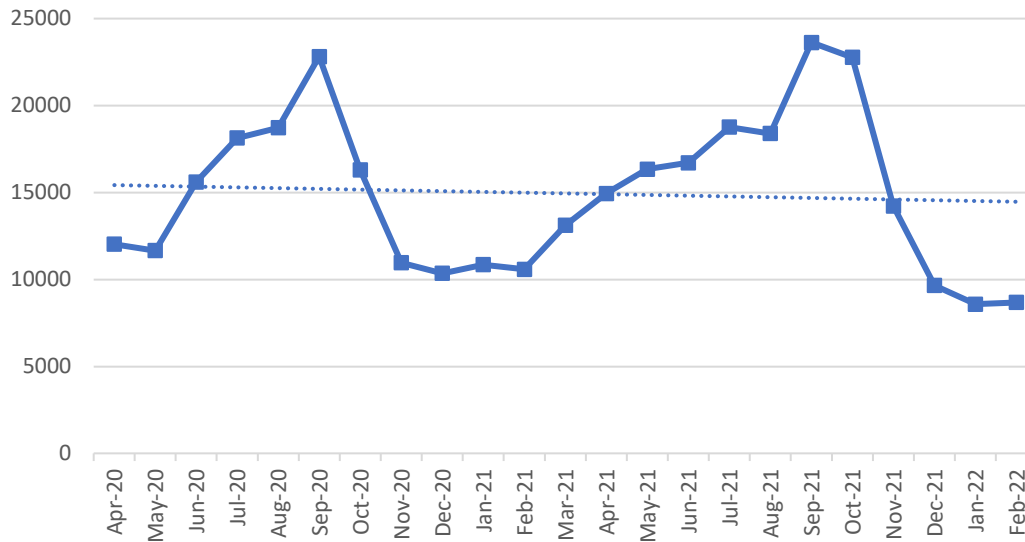
Source: Town & Place AI

Much Wenlock: Postcode Conversion
February 2022



The following chart shows footfall in Much Wenlock town centre from April 2020 to February 2022. Overall footfall stood at 8,783 in February 2022, which represents a decrease of 18% over the same month in 2021. This bucks the general trend across Shropshire, where footfall is generally considerably up in 2022 compared with 2021. The chart below shows the overall trend since April 2020 is slightly downward, and that footfall, like catchment conversion, is prone to considerable fluctuation.

Chart 5: Trends in Footfall



Much Wenlock attracted 5,566 unique visitors in February 2022, each of whom visited an average of 1.56 times to generate footfall of just under 8,700. The average number of visits is low compared with most Shropshire towns, and implies that it is common for Much Wenlock residents to shop elsewhere. The average dwell time in February 2022 was 32 minutes.

Alternative Shopping Destinations

Much Wenlock primarily services its own local population, the postcode district TF13 and neighbouring TF12 (Broseley). However, residents in the TF13 postcode are 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 TF13 postcode district which visited Shrewsbury, Bridgnorth and Church Stretton in each month between April 2020 and February 2022. Bridgnorth is within a 10 mile radius of Much Wenlock, and Shrewsbury and Church Stretton just slightly further afield (see map 2). It is clear that a high proportion use both Shrewsbury and Bridgnorth which are both easily accessible on the A458 in opposite directions. 37.8% of the TF13 population had visited Shrewsbury at least once in February 2022. In the same month, 32.9% had visited Bridgnorth. TF13 represents part of the core catchment for both Shrewsbury and Bridgnorth. As the following charts show, the proportion of the TF13 population visiting Shrewsbury or Bridgnorth fluctuates on a monthly basis. Visits to Shrewsbury dipped at the beginning of 2021 when the country was in lockdown but subsequently the trend has been upwards. Visits to Bridgnorth peaked over the summer of 2021.

Chart 5: Shrewsbury

Postcode Conversion Trend (%)



Chart 6: Bridgnorth

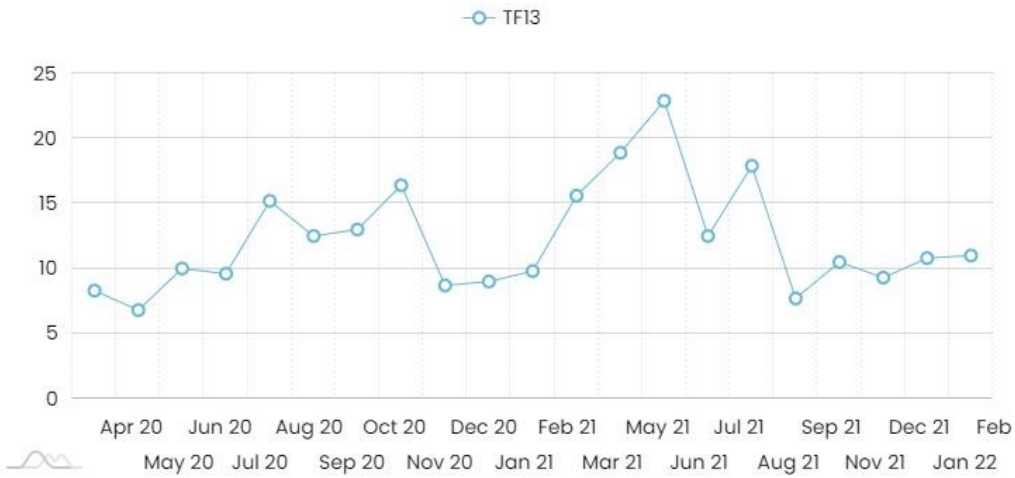
Postcode Conversion Trend (%)



TF13 residents are less likely to visit Church Stretton than either Shrewsbury or Bridgnorth, but notwithstanding this, 11% of residents did visit at least once in February 2022.

Chart 7: Church Stretton

Postcode Conversion Trend (%)

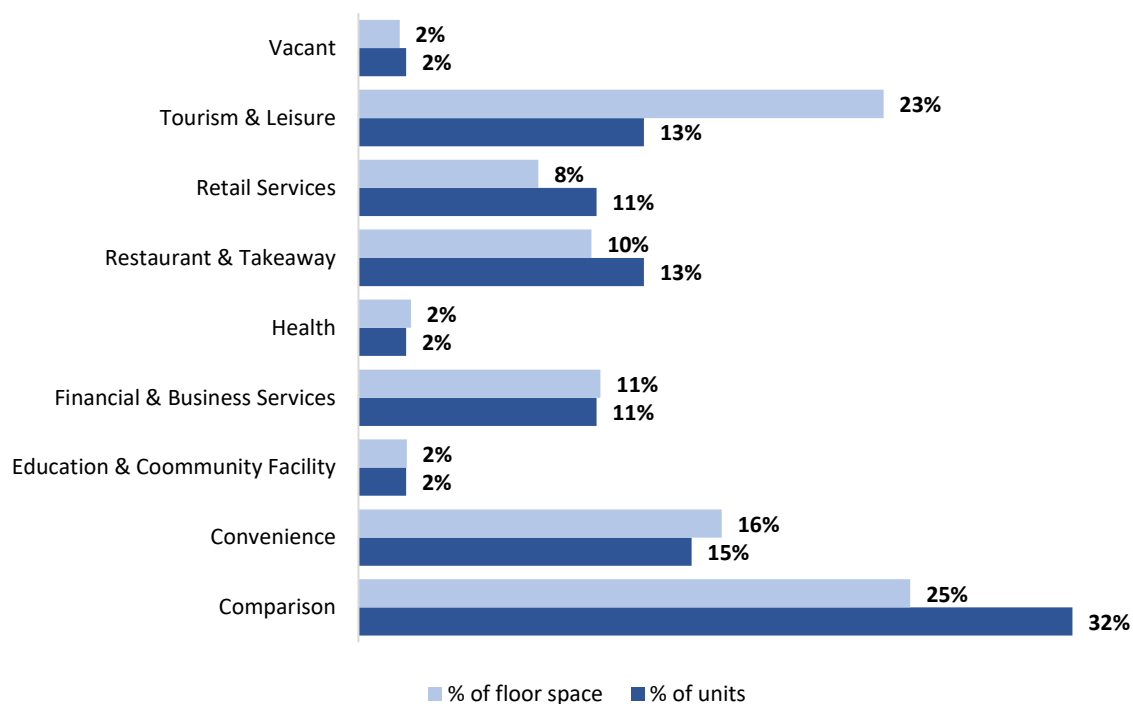


Postcode conversion charts have been downloaded from the Town and Place AI tool, which monitors visitor numbers and footfall across a range of towns and city centres across the UK.

Key Audit Results

A total of 47 business premises are contained within the Much Wenlock survey area. These are primarily in High Street (30 businesses), with smaller numbers in Barrow Street (9 businesses), the Square (6 businesses) and Wilmore Street (2 businesses). Gross floor space allocated to these businesses is around 4,900m² (nearly two-thirds on High Street). The average store size is 103m² with units ranging in size from 12m² to 455m². The number of commercial units in the town has not changed since 2019.

Chart 8: Breakdown of Much Wenlock Commercial Premises by Classification, 2023



The highest proportion of commercial units is allocated to comparison retail, with these accounting for 32% of units (25% of floor space). Convenience retail accounts for 15% of units and a similar share of floor space (16%).

Financial and business service providers account for a high share of units and floor space at 11%. 13% of units are allocated to restaurants and takeaways (10% of floor space). 13% of units are in the tourism and leisure sector (accounting for 23% of floor space).

A comparatively small share of capacity is dedicated to retail service providers (11% of units and 8% of floor space).

There is just one vacant premise in Much Wenlock (2% of units), which is the equivalent of 2% of floor space.

Change since 2022

There has been very little change in the number of businesses trading in each sector in Much Wenlock between September 2022 and September 2023. There is one fewer convenience store and the finance/business services offer has also been reduced by one store. There are two new comparison outlets and also two additional operators in tourism and leisure. The number of restaurants/takeaways remains unchanged, as does the number of retail services providers.

Overall, business churn in Much Wenlock is has typically been low since 2019. However, the churn rate did pick up to 13% in 2023 compared with rates of 9% in 2022, 4% in 2021 and 6% in 2020.

Chart 9: Change in Number of Units by Category, 2022/23

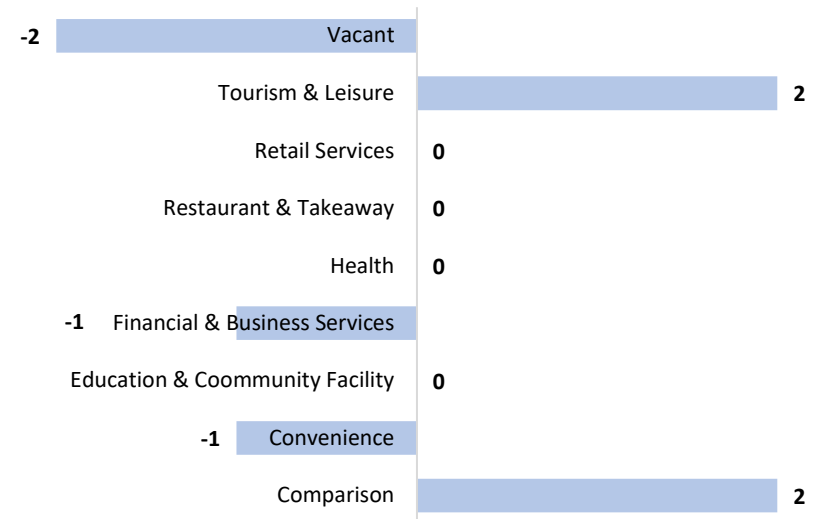
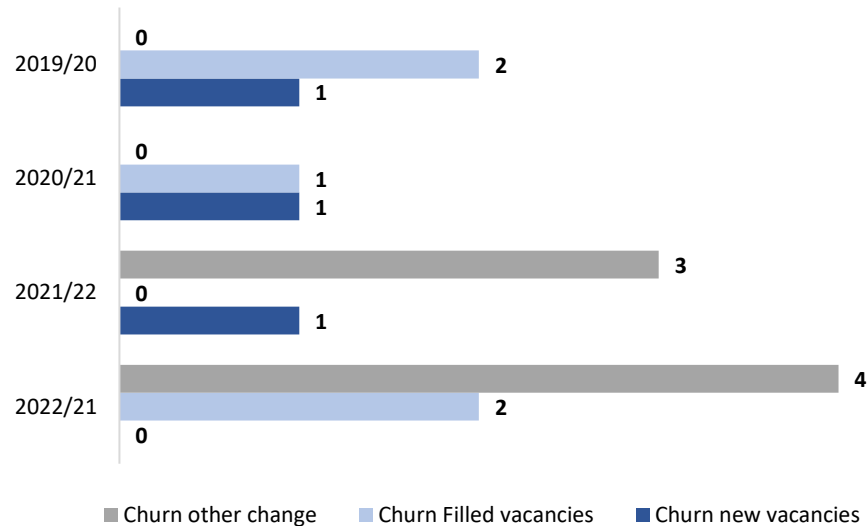


Chart 10: Breakdown of Churn, 2019-2023



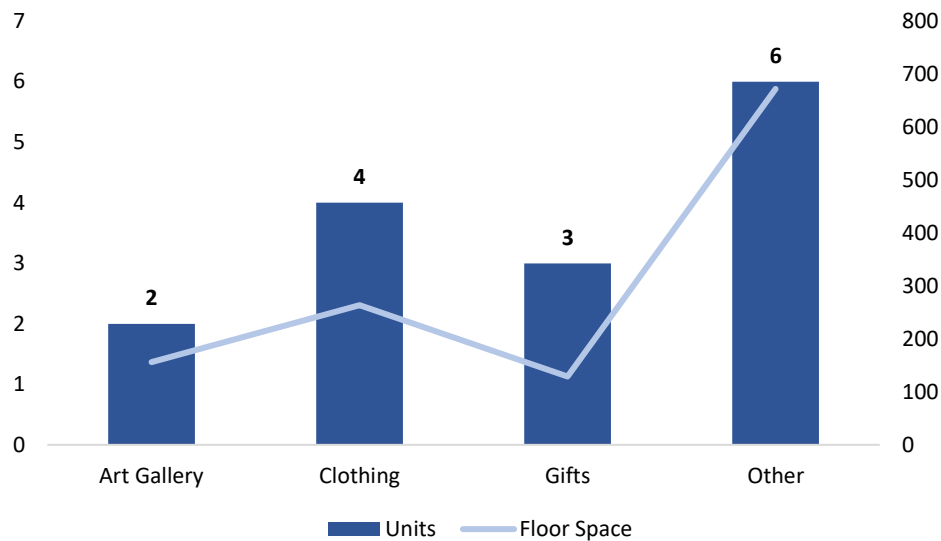
In 2023, all change in Much Wenlock was positive, with no new vacancies arising and two of the premises which were vacant in 2022 becoming filled. Two-thirds of churn (the equivalent of four businesses) was attributable to businesses changing purpose or branding.

Comparison Retail

32% of commercial units are dedicated to the comparison retail category, accounting for 25% of gross floor space. This equates with 15 stores with over 1,200m² of floor space. This means that the comparison category accounts for the largest share of both units and retail space in the town. Over the last year, the offer was extended by the opening of two new outlets—a pet store and a gift shop.

Within Much Wenlock there are four clothing shops, including stores catering for both men and women, two art galleries and three gift shops (one new). Together, these account for 61% of units and 43% of floor space in this category. Represented by just one outlet are a book store, a florist, a pharmacy, a charity shop, a pet store and an antique store. The latter accounts for a disproportionately large share of floor space (14%).

Chart 11: Breakdown of Comparison Retail by Type, 2023



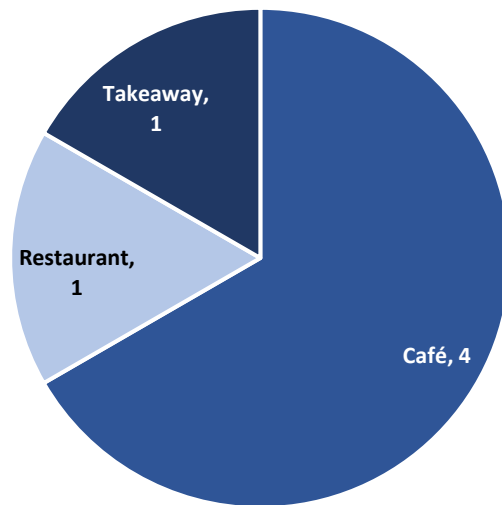
All outlets in the comparison goods category in Much Wenlock are independent.

Convenience Retail

There are seven convenience stores within the main shopping area of Much Wenlock. These account for 15% of all units and 16% of gross floor space. One store has closed since the 2021 audit—the town’s delicatessen. As well as three general convenience stores (including a branch of Spar), there is a butcher, a health food store, an organic food specialist and a pie shop. There is no major supermarket within the town. One of the general convenience stores is new, but the town’s bakery and confectioners closed between the 2022 and 2023 audits.

Restaurants & Takeaways

Chart 12: Breakdown of Units in the Restaurant/Takeaway Sector, 2023



13% of units in Much Wenlock are attributable to restaurants and takeaways, with this category accounting for a slightly lower proportion of gross floor space (10%). The six units are split between cafés (67%), restaurants (17%) and takeaways (17%). The only change in the classification in 2023 was the relocation of the town’s chocolate café. There are no chain stores in the restaurant and takeaway category in Much Wenlock.

The sole restaurant offers Indian cuisine, while the takeaway is Chinese. The Raven hotel also has in-house dining facilities.

Tourism & Leisure

Also within the hospitality sector, there are three public houses, one of which was newly opened in 2023. These take up approximately 610m² gross floor space. The Raven hotel is also located in the main shopping area of the town—it is still open but is up for sale. There is a tourist information centre plus museum in the Square as well as some new self-catering accommodation.

Finance & Business Services

There are five commercial operators in the finance, professional and business services sector in Much Wenlock town centre, accounting for over 500m² of gross floor space. Included within this classification are two estate agents, a chartered surveyor, a solicitor and an IT consultant. A financial adviser ceased trading between the 2022 and 2023 audits.

Retail Services

There are only five retail service businesses operating in Much Wenlock town centre, with these accounting for less than 400m² of gross floor space. These account for just over a tenth of all commercial operators within the town. There has been no change in the number of operators over the last year, and the offer is likewise unaltered. There are three hair and beauty salons, an optician and a funeral director. Compared with other towns of a similar size, this classification is notably under-represented in Much Wenlock.

Health

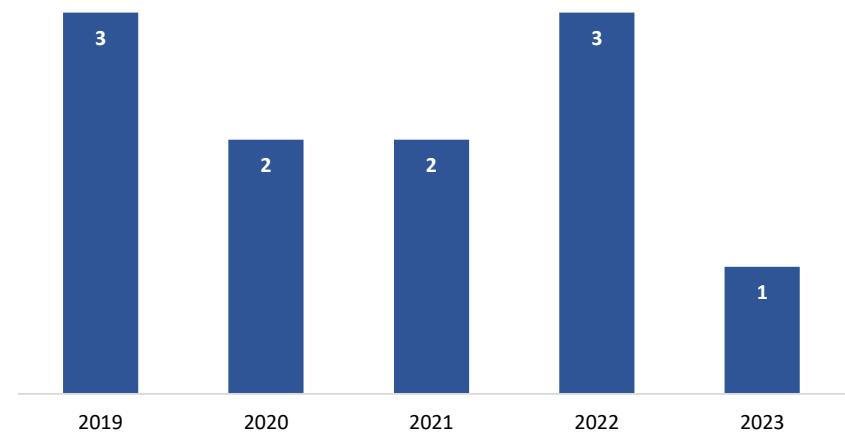
There is a dentist practising within the main shopping streets of Much Wenlock.

Vacant Units

Since 2019, the number of vacancies has fluctuated between one and three and the vacancy rates has consistently been amongst the lowest of all Shropshire towns. There was just one vacant premise in 2023, down from three the previous year. This equates with a rate of 2%, which is also much lower than the vacancy rate nationally which stood at 13.9% in the second quarter of 2023 according to BRC (data relating to high streets only). The one vacant premise is on the High Street.

Although there is just one empty premise in the town, it is a long-standing vacancy, having been unoccupied since at least 2019.

Chart 13: Number of Vacant Commercial Premises, 2019— 2023

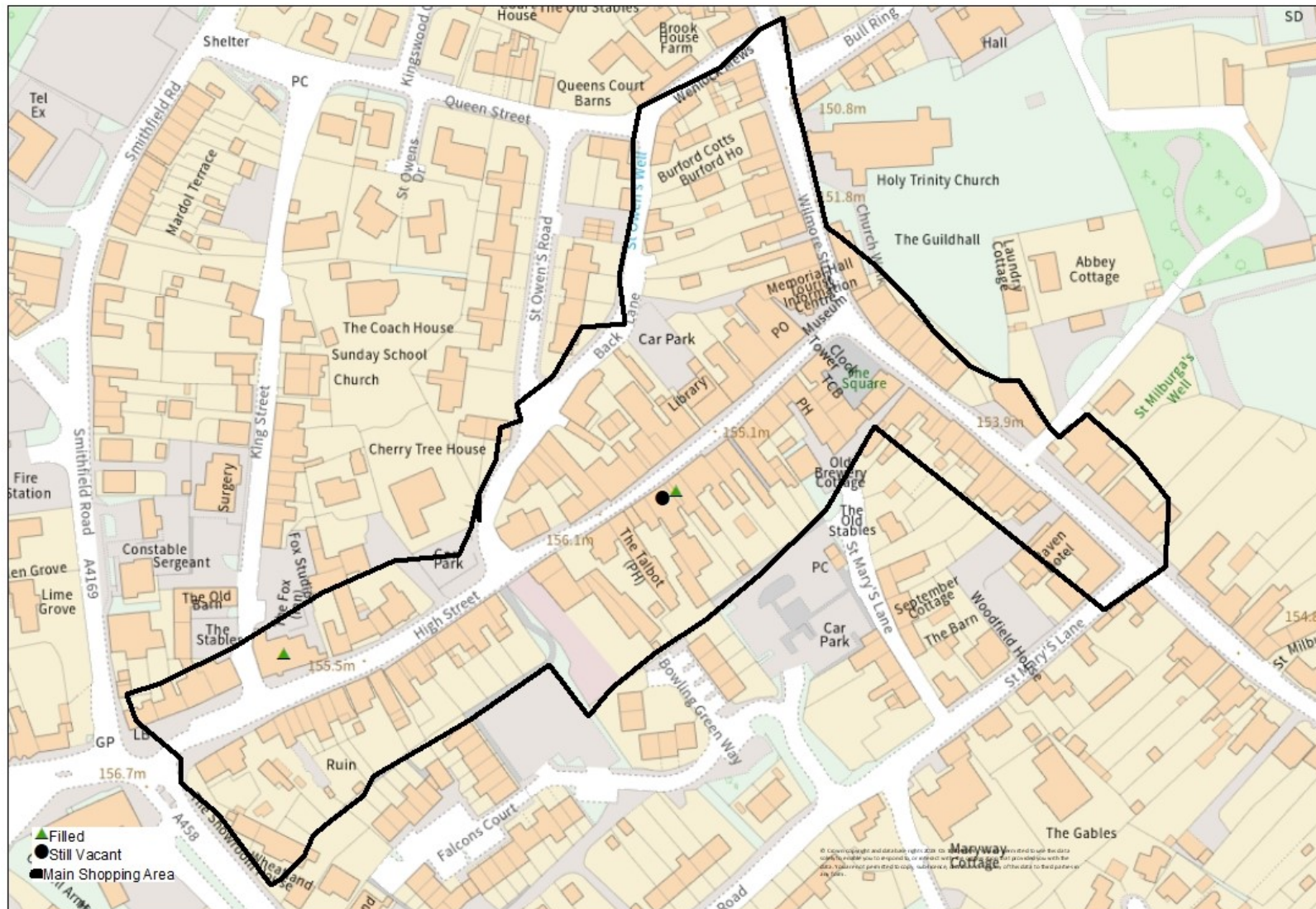


Map 7: Location of Vacant Commercial Premises, 2023



The number of vacant premises in Much Wenlock reduced by two to just one in 2023. There were no new vacancies this year; hence, of the three units which were unoccupied in 2022, two had become occupied and one remains empty.

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



Residential Premises

The main shopping streets of Much Wenlock comprise a mix of residential and commercial premises. In total, 108 residential premises are located in the audit area, of which the majority are either terraced or flats (45 premises and 33 premises respectively). Flats, the equivalent of 30% of all residential premises, are largely located above retail or other commercial outlets. This stock is primarily along the north eastern stretch of the High Street where most of the commercial outlets are situated. Terraced houses, accounting for 42% of stock, are also principally along the High Street, albeit on the more southerly section. There are 12 detached and 18 semi-detached properties in the audit area. There have been no major changes in residential stock levels over the last few years.

Map 9: Location of Residential Premises in Much Wenlock Town Centre

Chart 14: Breakdown of Residential Properties by Type

