Shrewsbury: Town Centre Audit Analysis, 2023

Shropshire Council

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Introduction

An audit of businesses operating in Shrewsbury'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. Shrewsbury centre was first audited in November 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

- 764 commercial units, occupying 143,200m^2 gross floor space.
- Largest centre in Shropshire accommodating 30% of all Shropshire High Street traders—more than twice the size of any other town. Relatively low number of stores per head of population at 10 units per 1,000 population (excluding local shop parades or out-of-town retail centres).
- Average store size 187m^2 which is notably larger than the average across Shropshire (147m^2) - floor space per 1,000 population is therefore more closely aligned with the Shropshire average.
- 917 residential premises in the main shopping area, giving a ratio of 0.8:1 commercial versus residential properties.
- Shrewsbury had a 11% business churn rate between the 2022 and 2023 audits—this compares with an average of 12% across Shropshire.
- 11% of all commercial premises were vacant in 2023, which is a significant reduction compared with 2020. Shrewsbury now has fewer vacant units than pre-pandemic. The vacancy rate is on a par with the county average.
- The highest proportion of commercial units is attributable to comparison retail (31%), with only Church Stretton, Bishop's Castle, Whitchurch and Ludlow supporting a higher proportion of units in this category.
- Retail services are also slightly under represented (17%) as is convenience retail (4%).

Methodology Statement

Only the main retail centre of the town was surveyed, as shown on Map 4. Out-of-town retail parks and local shopping parades are not included.

Both retail and non-retail businesses will be operating in other parts of the town. In the case of Shrewsbury, there are three main retail parks outside the town centre as depicted on map 7. There are also concentrations of employment outside the town centre, especially to the north, where Battlefield Enterprise Park is located.

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

Shrewsbury is by far the largest shopping centre in Shropshire, accounting for about 30% of town centre based commercial outlets in the County.

Map 1: Shropshire's Main Retail Centres

About Shrewsbury

Shrewsbury is located amidst beautiful countryside with the nearby Welsh border to the west , and the larger town of Telford and the West Midlands conurbation to the east. Shrewsbury is the county town of Shropshire and has a fine medieval heritage. The town centre is packed with timber framed black and white buildings, steep narrow streets and alleyways. It has over 600 listed buildings including the Castle, which is now a regimental museum, and also the famous Shrewsbury Abbey. Charles Darwin was born and educated in Shrewsbury and there are many references to him around the town. Shrewsbury is a vibrant market town with many bars, shops, restaurants and cultural assets and is a popular tourist destination. The River Severn forms a loop around the town, giving Shrewsbury a unique geography and many riverside walks. The Quarry park is situated alongside the river. This is an important natural asset and plays host to a number of events throughout the year, including the famous Shrewsbury Flower Show.

Shrewsbury is designated a Business Improvement District which commenced on 1st April 2014 as a business-led and business-funded body. Businesses in the BID area contribute via business rates to fund works to improve and promote Shrewsbury town centre as a place to live, work, visit and invest. The BID period was initially for a period of 5 years, but has since been renewed twice—once in 2019 and again in 2023. https://shrewsburybid.co.uk/

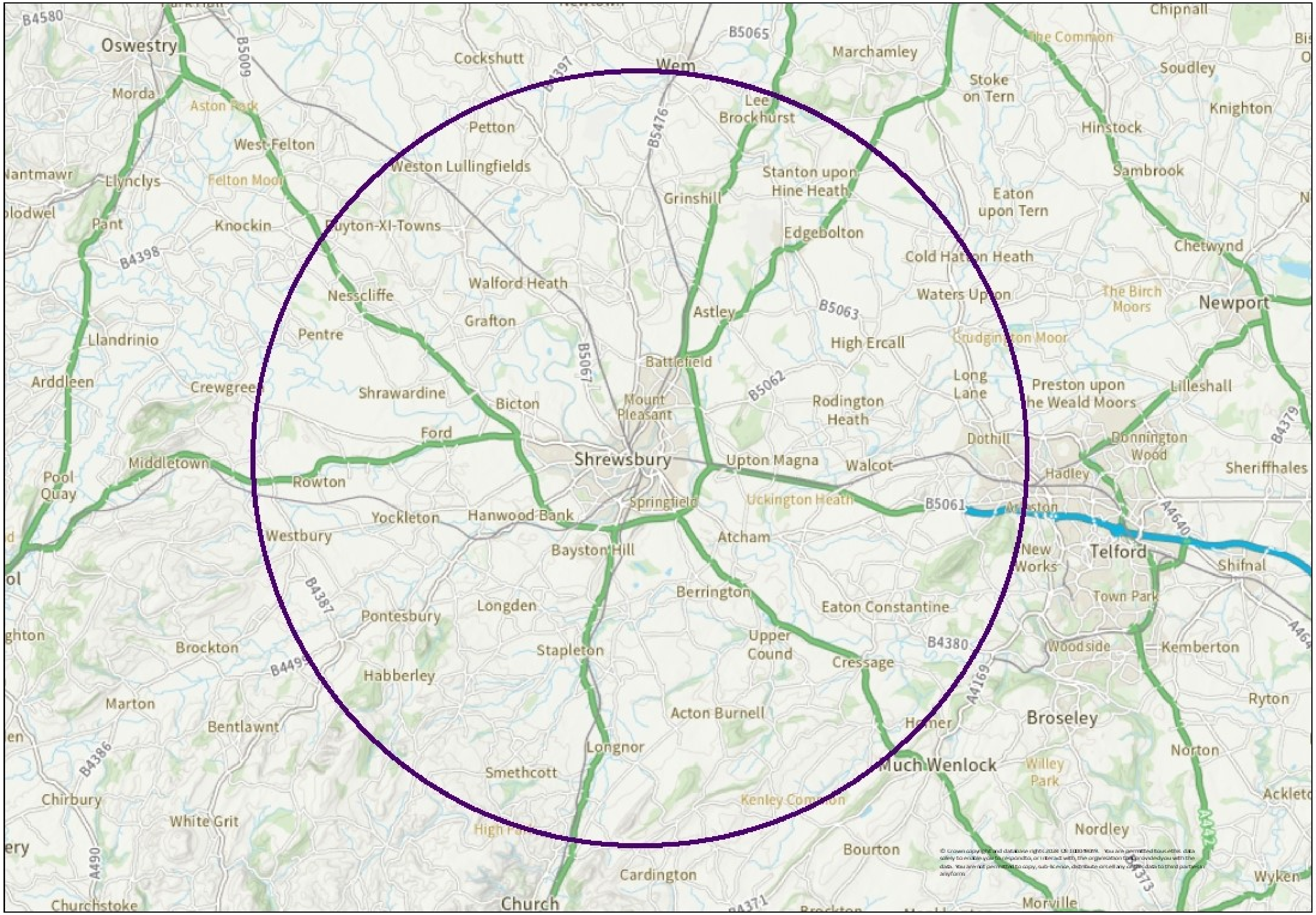
Today, the town has a population of 76,800 and 33,900 households (2021 Census). It is more than four times larger than the second ranked Shropshire town (Oswestry). The town's population has grown by 7.1% since 2011, which makes it one of the fastest growing settlements in the county.

As the key county town, Shrewsbury is at the heart of Shropshire's transport network which makes it easily accessible from most other parts of the county. Many of the A roads radiate from Shrewsbury. The A5 London to Holyhead road provides northerly access to Oswestry and North Wales whilst heading east takes in Telford and Staffordshire before continuing on to London. The A49 heads north through Whitchurch on to Cheshire and Warrington, whilst heading south through Church Stretton, Craven Arms, Ludlow and on to Hereford. The A458 heads west to Welshpool and Mid Wales, whilst heading south east to Much Wenlock, Bridgnorth and on to Stourbridge. The A53 starts at Battlefield and heads north east taking in Shawbury and Market Drayton, continuing on to Stoke-on-Trent and Buxton.

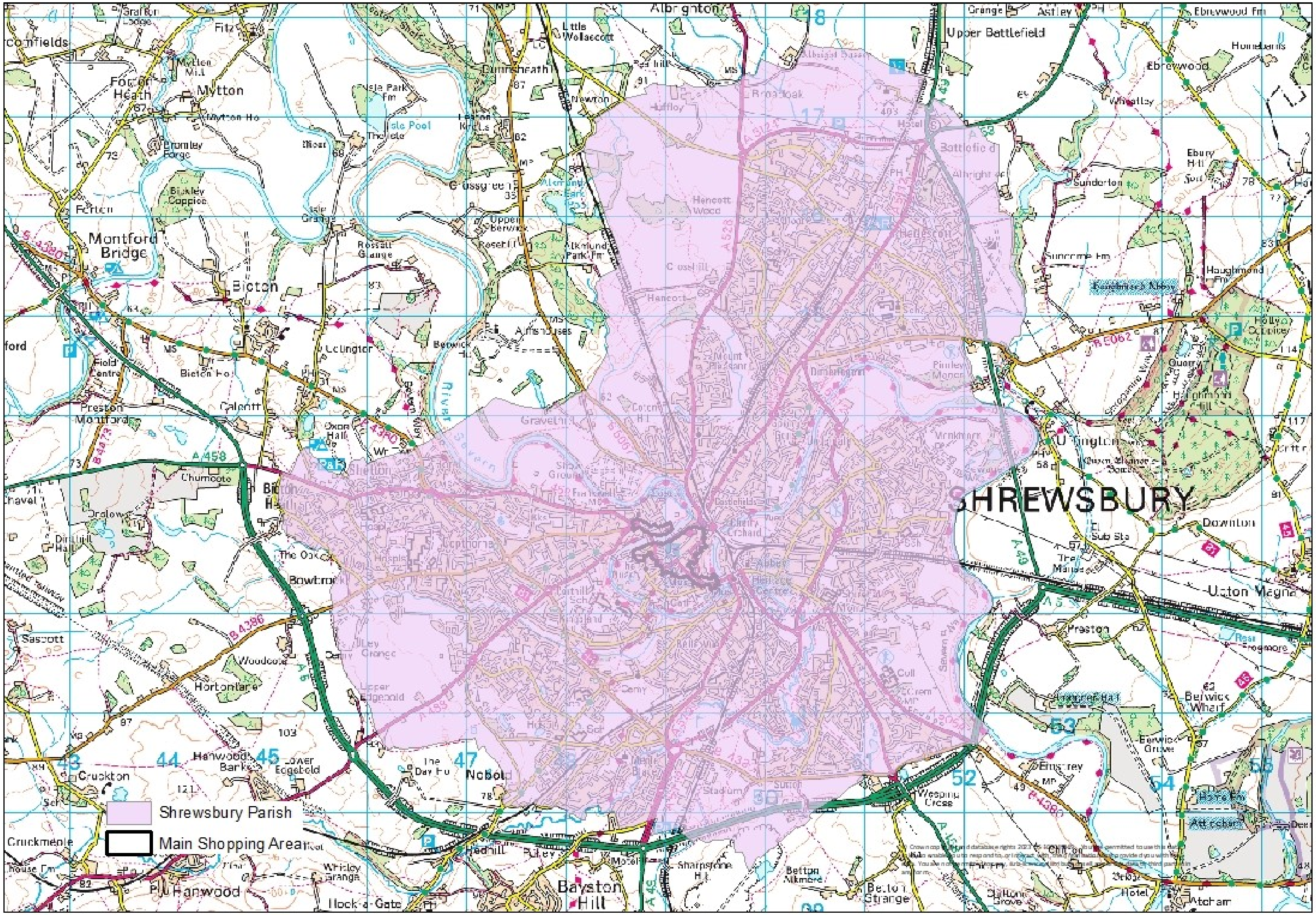
Shrewsbury is a key interchange for train travel in Shropshire. Train services provide direct links southwards to Hereford, Newport and Cardiff, westwards to Welshpool and Aberystwyth, northwards to Crewe and Manchester and to the east to Telford, Wolverhampton and Birmingham. There is also a direct line between Shrewsbury and London.

The total population within a 10 mile radius of Shrewsbury is 142,500. This geography is shown on Map 2. Overall, Shrewsbury town council area (depicted on Map 3) covers an area of 3,799 hectares. The main shopping area (depicted on Maps 3 and 4) is much smaller than this, at around 28 hectares.

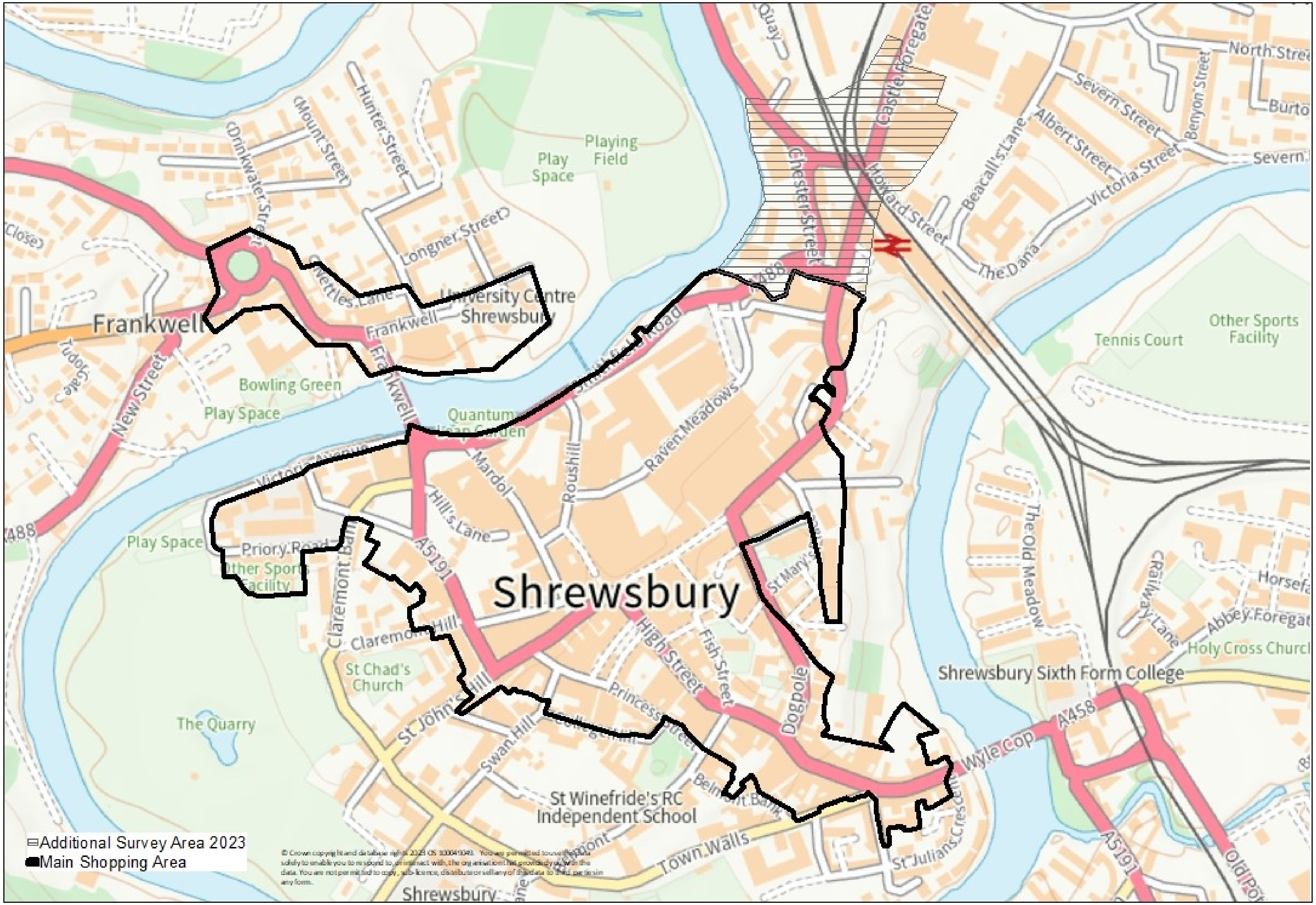
Map 2: Location of Shrewsbury showing 10 mile radius



Map 3: Shrewsbury Town Council



Map 4: Main Retail Shopping Area



Shrewsbury Businesses and Employment

Shrewsbury is the main employment hub in the county. It is one of the few Shropshire towns that has more jobs than it has resident workers, providing approximately 44,100 jobs across the town council area *(ONS Business Register and Employment Survey, 2022)*. This is the equivalent to more than a third of all jobs in Shropshire. Key sectors include:

- Health (27.1% of jobs)
- Retail (10.7% of jobs)
- Accommodation & Food Services (7.3% of jobs)
- Professional, Scientific & Technical (6.8% of jobs)
- Education (6.8% of jobs)

More than 5,000 businesses have their registered office in the town council area. Outside the town centre, businesses and jobs are concentrated in the business parks and industrial estates on the outskirts of town. These include Battlefield Enterprise Park to the north of the town, Shrewsbury Business Park in the south east, Oxon Business Park in the west and Old Potts Way, which is close to the town centre.

The Retail Offer

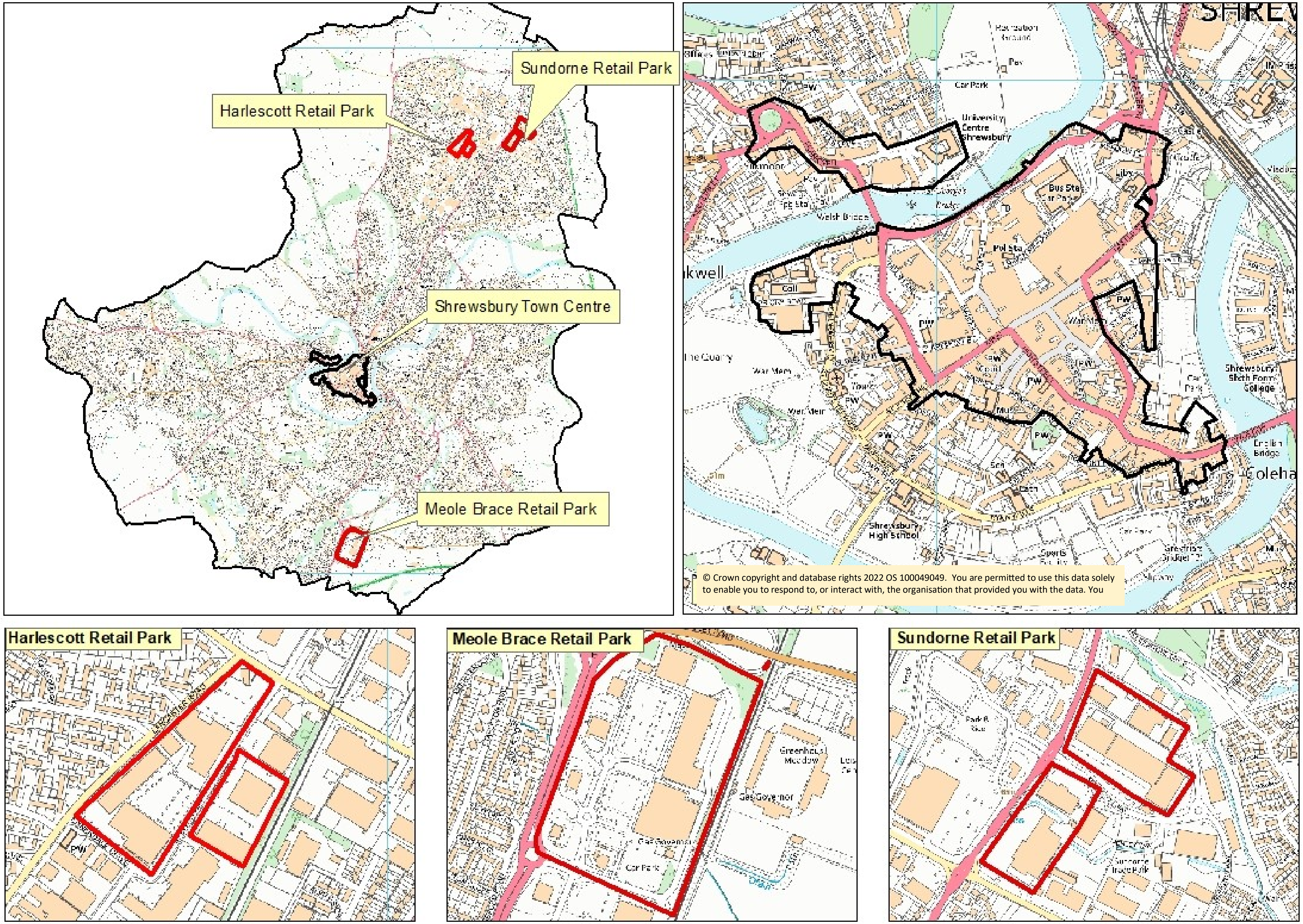
Shrewsbury's town centre retail offer focuses on a mix of independents and national brands, and includes a wide selection of cafés, restaurants and public houses as well as numerous retail, financial and business service providers. The town benefits from an indoor market, for which the main trading days are Tuesdays, Wednesdays, Fridays and Saturdays. There is late night opening on the first Saturday of the month for special food and drink events in the market hall. A farmers' market is held on the first Friday of the month in the Square.

Outside the town centre, there are three main retail parks as shown on Map 5, plus numerous local shopping parades that serve nearby residents. The three main retail parks are Harlescott and Sundorne, both to the north of the town centre, and Meole Brace, which is to the south.

There are currently three Park & Ride sites that provide easy and regular access to the town centre—these are Oxon to the west, Meole Brace to the south and Harlescott in the north.

Like many cities including Bristol and Manchester, Shrewsbury has been classified by 'The Institute of Place Management' as a **multi-functional, comparison centre** based on its footfall signature.

Map 5: Out-of-Town Retail Parks



Catchment

Shrewsbury has a large day time population, comprising not only residents that do not work (or work part-time) but also the substantial workplace population (notwithstanding the large number of people who have been home-working since the start of the pandemic).

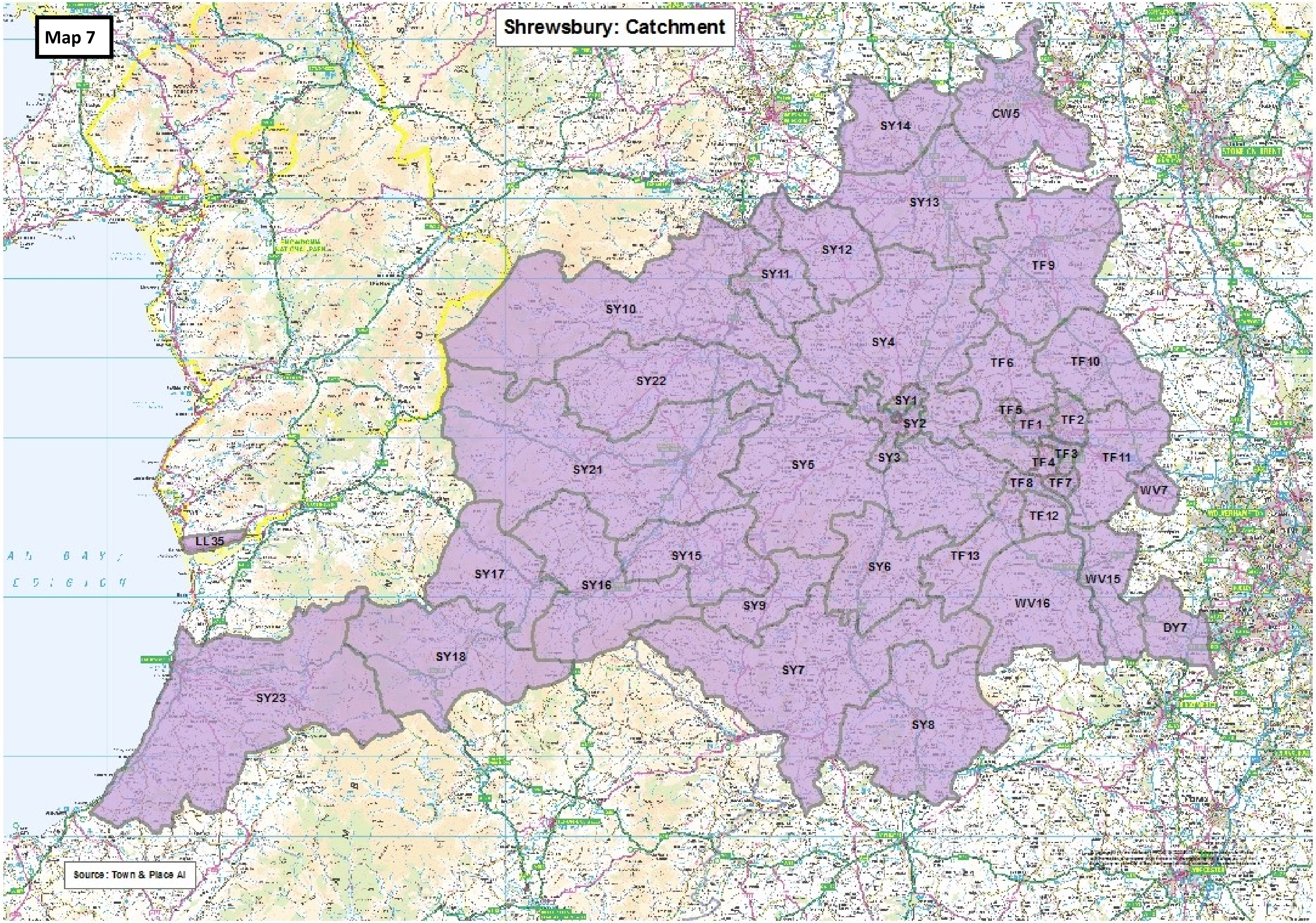
As a retail centre, Shrewsbury draws footfall not just from residents of the town and immediate surrounding areas and its workday population, but also from further afield, including the rest of Shropshire and mid-Wales. For a Welsh catchment population which stretches to the coast, Shrewsbury is the most easily accessible retail centre (see Map 7) of a reasonable size. Furthermore, Shrewsbury offers a much more extensive range of goods and services than other towns and settlements in Shropshire, particularly in the comparison retail category. This means that Shrewsbury draws shoppers from nearby towns who want more choice and a greater range of goods and services than their own local town centre can provide.

The town's mix of recognisable national brands and unique independent stores attract not just regular shoppers but day trippers as well. Overall, a population of more than 8 million people live within a 60 mile drive of Shrewsbury town centre, as shown on Map 6.

Map 7 shows the main catchment for Shrewsbury town centre. It covers the town itself and a substantial hinterland that stretches into Wales to the west, past Whitchurch to the north, towards Ludlow to the south and as far as the Black Country to the East. Overall, the area includes 40 postcode districts.

The total population within the catchment is 607,959 people which is the second largest in Shropshire after Bridgnorth. The average catchment distance is however relatively short at 10.43 miles.

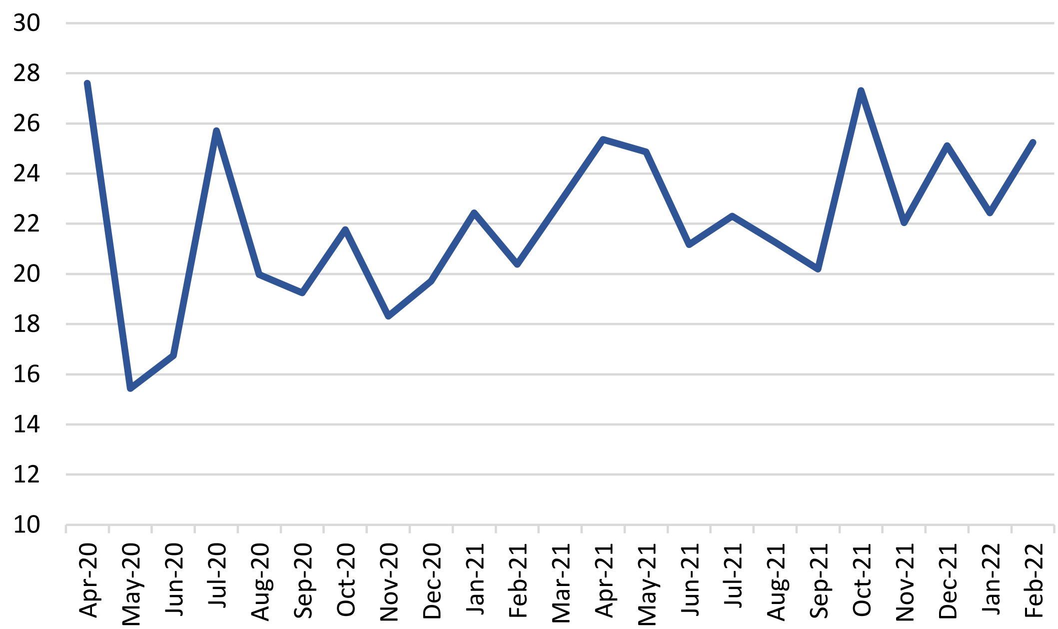
Map 6: 60 Minutes Drive-Time from Shrewsbury



Map 7
Shrewsbury: Catchment
CW5
SY14
SY13
SY12
SY11
TF9
SY10
SY4
TF6
TF10
SY22
SY1
TF5
TF1
TF2
SY2
SY3
TF3
TF4
TF11
SY21
SY5
TF8
TF7
WV7
TF12
LL35
SY15
TF13
SY17
SY6
SY16
WV15
SY9
WV16
DY7
SY18
SY7
SY23
SY8
Source: Town & Place AI

The chart below shows the percentage of the catchment population visiting Shrewsbury at least once a month since April 2020. The conversion rate has ranged between 15.4% (May 2020) and 27.6% (April 2020).

Chart 1: Catchment Conversion (%)



Source: Town & Place AI

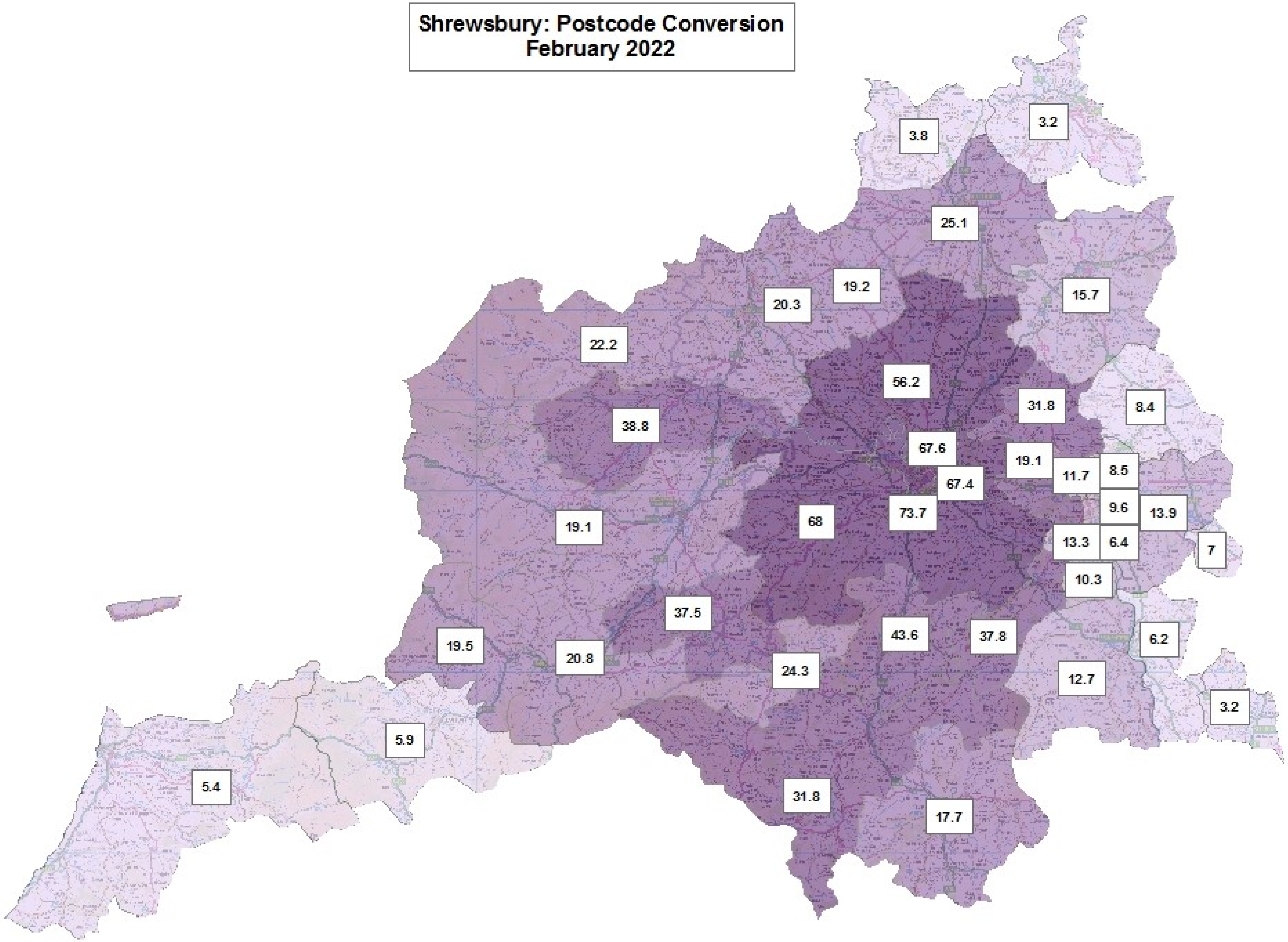
Note. Catchment defined as any postcode district from which at least 3% of residents visited the town on at least one occasion during the preceding month. Hence, the precise catchment area and catchment population will change on a monthly basis.

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

The overall catchment conversion stood at 25.2% in February 2022. However, this ranges from more than two-thirds in SY1, SY2, SY3 and SY5 to less than 5% in SY14, CW5 and DY7. The town centre itself is in SY1.

Map 8

Shrewsbury: Postcode Conversion February 2022



Source: Town & Place AI

Overall, 79% of visitors to Shrewsbury originated from the 22 postcode districts that make up the core catchment. This proportion is relatively high, although it does cover a wide geographic area. The remainder of the catchment accounts for 15% of visitors, with the remaining 6% representing visitors from further afield (classified as tourists). The proportion of visitors accounted for by tourists is relatively low. (although it should be noted that February is not peak tourism season).

82,930 visitors in February 2022 were from the key Shrewsbury postcode districts of SY1, SY2, SY3, SY4 and SY5.

Chart 2: Breakdown of Visitors to Oswestry, February 2022

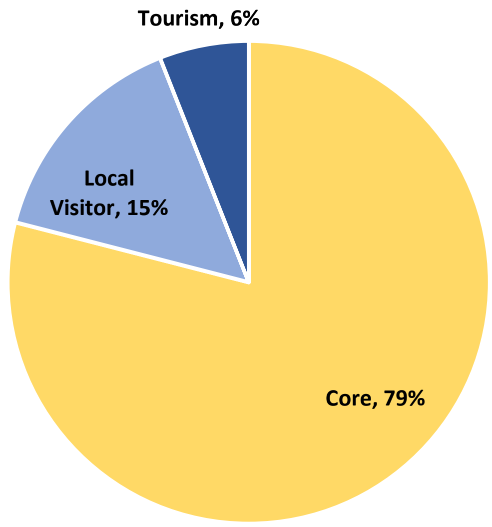
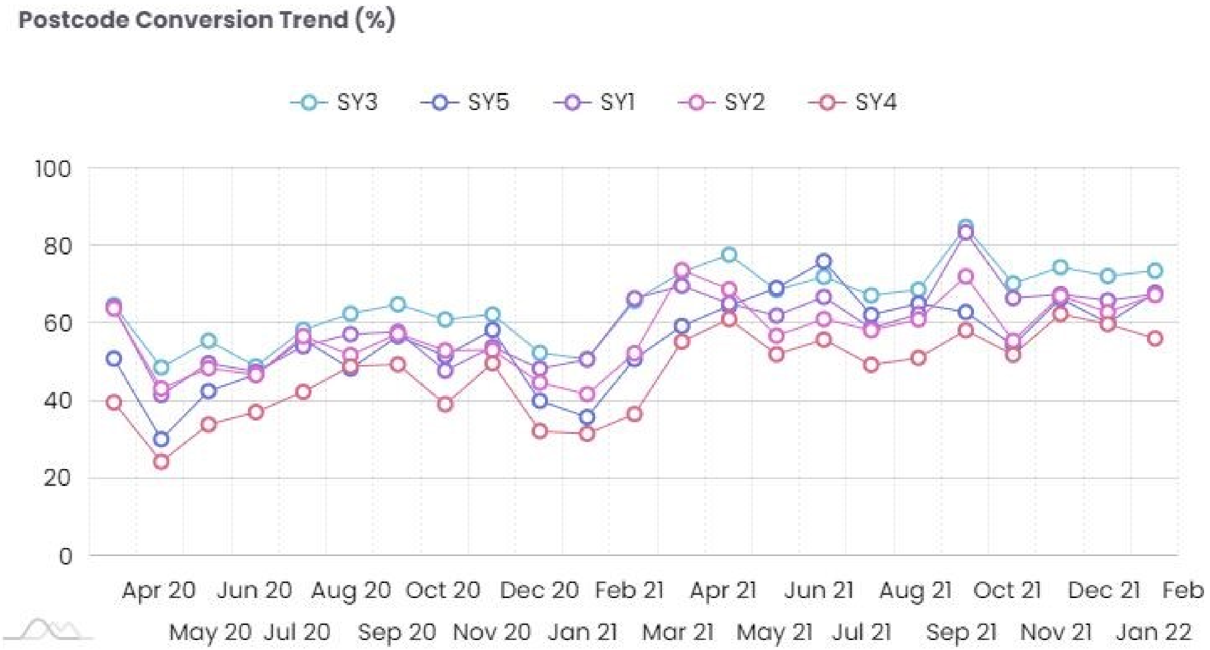


Chart 3: Trends in Shrewsbury Postcode Conversion

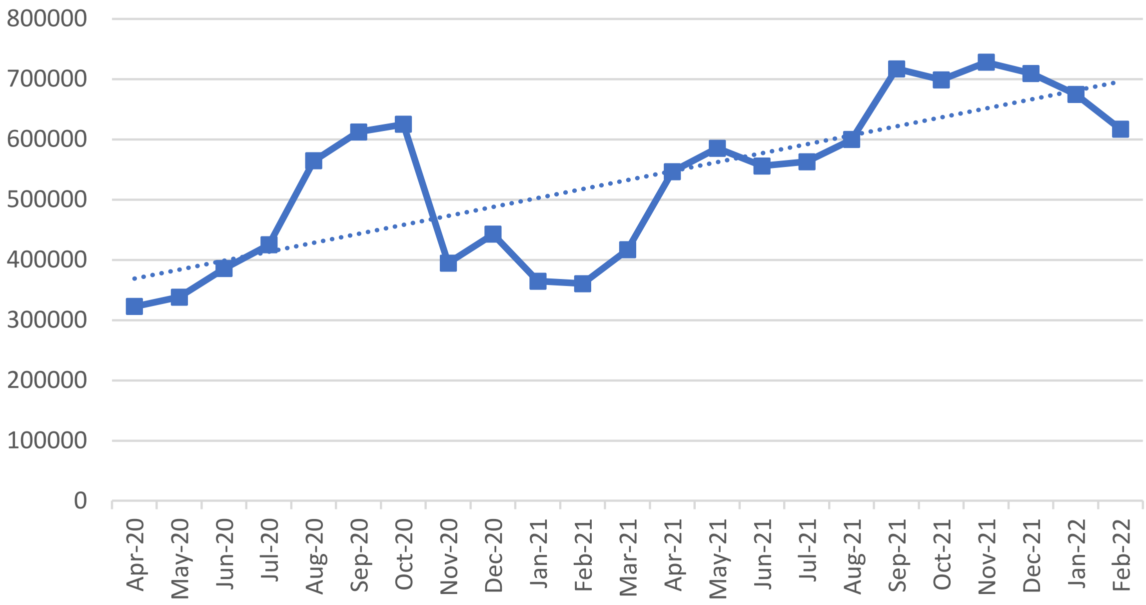


The adjacent chart shows trends in postcode conversion of the top five postcode districts which use Shrewsbury as a retail destination. It shows that conversion from all postcodes has followed a similar trend since April 2020.

Source: Town & Place AI

The following chart shows footfall in Shrewsbury 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 616,604 in February 2022, which represents an increase of 71% over the same month in 2021. Footfall in Shrewsbury is almost twice as high as in any other Shropshire town.

Chart 4: Trends in Footfall

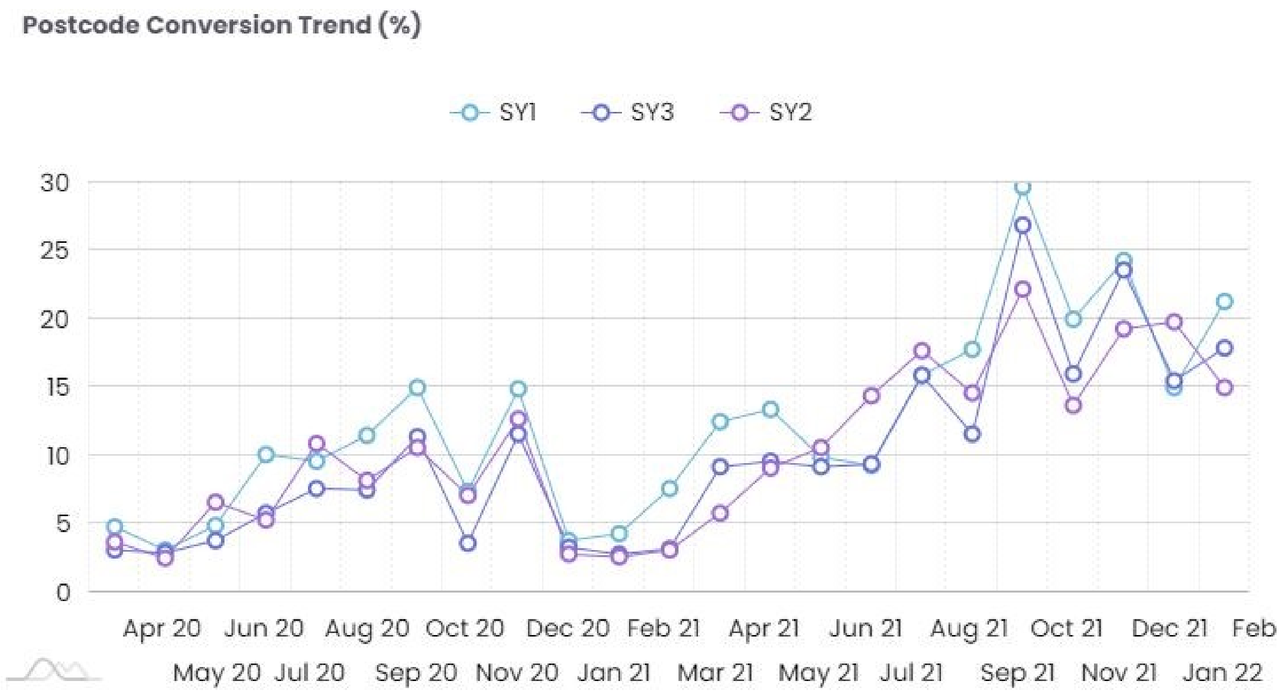


Shrewsbury attracted 147,867 unique visitors in February 2022, each of whom visited an average of 4.2 times to generate footfall of over 616,000. The average dwell time was 49 minutes. Both the average number of visits and the average dwell time are high in Shrewsbury compared with other Shropshire towns.

Alternative Shopping Destinations

Shrewsbury is large enough to retain a substantial share of retail expenditure, although clearly its residents do visit other locations on shopping expeditions. The most commonly visited alternative location is Telford, which was visited by 21.3% of SY1 residents, 15% of SY2 residents and 17.9% of SY3 residents in February 2022. The chart below shows that the postcode conversion rate for all three Shrewsbury postcode districts for Telford have increased steadily (albeit with fluctuations) over the last year as Covid-19 restrictions have eased.

Chart 5: Telford



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

Key Audit Results

A total of 764 commercial business premises are located within the Shrewsbury survey area. These commercial units account for approximately 143,200m^2 of gross floor space. **This includes 30 units (14,000m^2) in the Castle Foregate area that were not included within the audit prior to 2023.**

Chart 6: Location of Businesses Operating in Shrewsbury Town Centre, 2023

	% of Units	% of floor space
Castle Street/Castle Foregate	21%	26%
Frankwell	8%	9%
High Street & the Square	18%	15%
Mardol & Barker Street	22%	20%
Pride Hill & Centres	16%	21%
Smithfield Road	3%	3%
Wyle Cop & Dogpole	13%	8%

More than a fifth of businesses operating in the main shopping area in Shrewsbury are located in Mardol/Barker Street (22% of units and 20% of gross floor space), with a slightly lower proportion along the High Street and around the Square (18% of units and 15% of floor space). A substantial number of units are located on Castle Street and adjacent streets (21% of units and 26% of floor space). These shares have increased since 2022 with the inclusion of additional area around the railway bridge. 16% of units are on Pride Hill or in the Darwin or Riverside Centres. 13% of units (8% of floor space) are in the Wyle Cop/ Dogpole area. Smaller numbers of commercial units are located in Frankwell and Smithfield Road, which are on the periphery of the town.

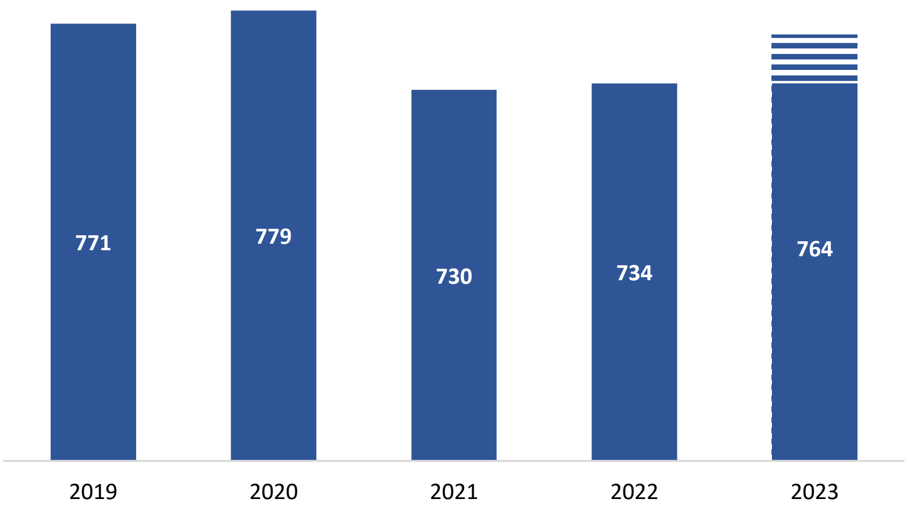
The largest units are located on Pride Hill or in the Darwin/Riverside centres, with an average size of 242m^2. Commercial units in Castle Street/Castle Foregate and Frankwell are also slightly larger than average (235 m^2 and 201m^2 each on average) while those along Wyle Cop/Dogpole are smaller than average (116m^2). The latter are primarily independent outlets. Outlets along Pride Hill are primarily national chains. Across the town, the average store size is 187m^{2,} which is notably larger than in any other Shropshire town (average 147m^2).

Map 9 shows the above zones, including the new area surveyed in Castle Foregate..

As well as the town centre and out-of-town retail parks shown on Map 5, there are also clusters of businesses on the outskirts of the town centre which are easily accessible on foot to those visiting the centre of town. These offer a wider range of goods and services than the local shopping parades that primarily serve residents in the immediate locality. These clusters include those located in Longden Coleham and Abbey Foregate.

Map 9: Shrewsbury Town Centre Shopping Zones

Chart 7: Number of Commercial Units in Shrewsbury, 2019-2023



Shaded area represents Castle Foregate, which was not audited prior to 2023

The number of commercial premises in Shrewsbury reduced significantly in 2021, primarily due to the closure of the Pride Hill Centre. 779 commercial premises were recorded in 2020, 49 more than in 2021. As well as the closure of the Pride Hill Centre, there has been some consolidation of space in the Darwin Centre, which has resulted in fewer units (although not necessarily less gross floor space). There was further consolidation in 2022, with a number of outlets merging to form larger units. However, there was an increase in consumer facing businesses operating in non-ground floor premises, and this means that the overall number of commercial premises in the town rose by four to 734. The number of commercial premises within the 2022 survey area remained stable at 734. However, the survey area was extended to include Castle Foregate (see Map 9) - there are 30 premises in this area, taking the Shrewsbury total to 764.

Shopping Centres

Repurposing within the town centre means that there is now considerably less commercial space within Shrewsbury's shopping centres than there was in 2020. The Pride Hill Centre, which had 39 units and gross floor space of 10,120m^2 has been shut completely, with many operators relocating to the nearby Darwin Centre. The Riverside Centre is still functioning, but more than two-thirds of its units are vacant.

The shopping centres are under the ownership of Shropshire Council, which means that their function is likely to be further repurposed in the coming years. There is an aspiration to demolish the Pride Hill Centre and the Riverside Mall as part of plans to renovate the Smithfield Road. This would leave the Darwin Centre as the main shopping centre serving the town.

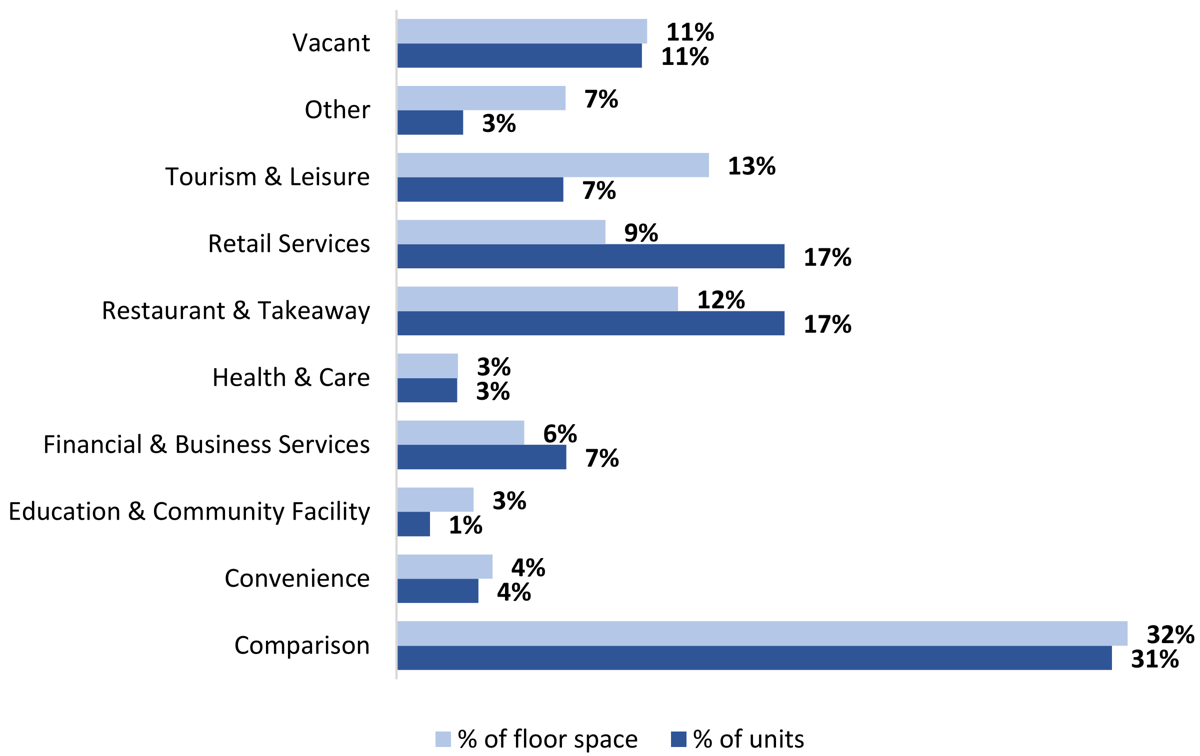
There are currently 41 units in the Darwin Centre, with a capacity of just under 10,400m^2.

Business Classifications

The highest proportion of the town centre is allocated to comparison retail. There are 236 comparison retailers in the main shopping streets, which cover a combined gross floor space of over 45,200m^2. This is the equivalent of 31% of units and 32% of space. The second highest share of units is attributable to retail services (17% of units), but as these tend to be small in size, they account for a smaller chare of space (9%). Restaurants and takeaways account for 17% of units (12% of floor space). 7% of units and 13% of floor space are allocated to tourism and leisure establishments. 7% of units (and 6% of floor space) is attributable to financial institutions and professional /business service providers. 4% of units are convenience retail, with this classification commanding a similar share of floor space. A small amount of the town centre is allocated to education & community facilities and to health and care as well as to other activities (mainly general offices).

Around one in nine units is vacant (11%).

Chart 8: Breakdown of Shrewsbury Commercial Premises by Classification, 2023



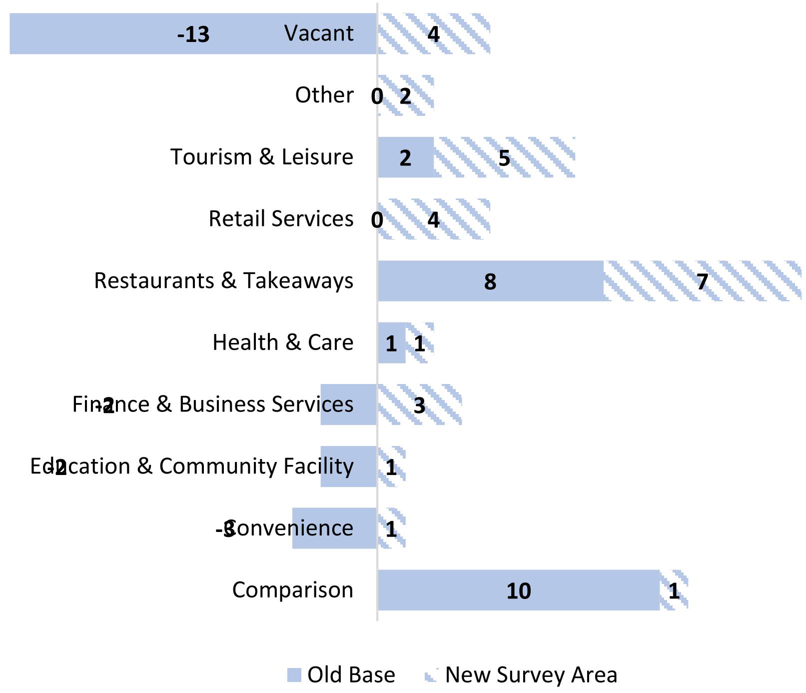
Change since 2022

There has been more change in Shrewsbury town centre since 2019 than in many places, in part because it is a significantly larger centre than any of the others and has the associated level of churn that is attributable to a main shopping destination. However, churn levels fell below the county average in 2023 to 11% (12% on average). This compares with rates of 14% in 2022, 13% in 2021 and 15% in 2020 (when most change was attributable to new vacancies).

The chart opposite shows change by classification between 2022 and 2023, with the solid bars showing change in the area surveyed in 2022 in relation to 2023, and the lined bars showing the difference when the new area surveyed is taken into account.

The comparison sector grew strongly in 2023, with the overall offer up by 11 units (10 units in the original survey area, plus one comparison unit in the new survey area). There was a net change of two fewer convenience retailers, with the loss of three stores in the original survey area offset by the presence of one store in the new area.

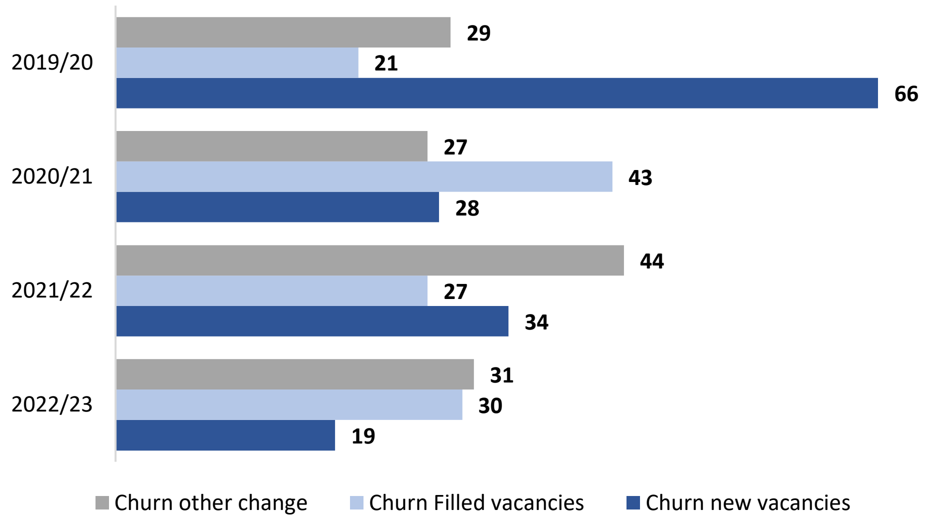
Chart 9: Change in Number of Units by Category, 2022/2023



There was modest change in the education and community facility and health and care sectors between 2022 and 2023. There were two fewer finance and business services providers in the original survey area in 2023, and no change in the retail services sector. Strong growth was registered in restaurants and takeaways, with an additional 15 units overall (eight in the original area and seven in the new area being surveyed. Likewise, there was positive change in the tourism and leisure sector with two new operators (seven in total including the expanded area).

There was a significant reduction in the number of vacant units in 2023, with 13 fewer in the original shopping zone. There were however, an additional four vacant premises in the new area being surveyed.

*Chart 10: Breakdown of Business Churn 2019-2023**



* excludes extended survey area

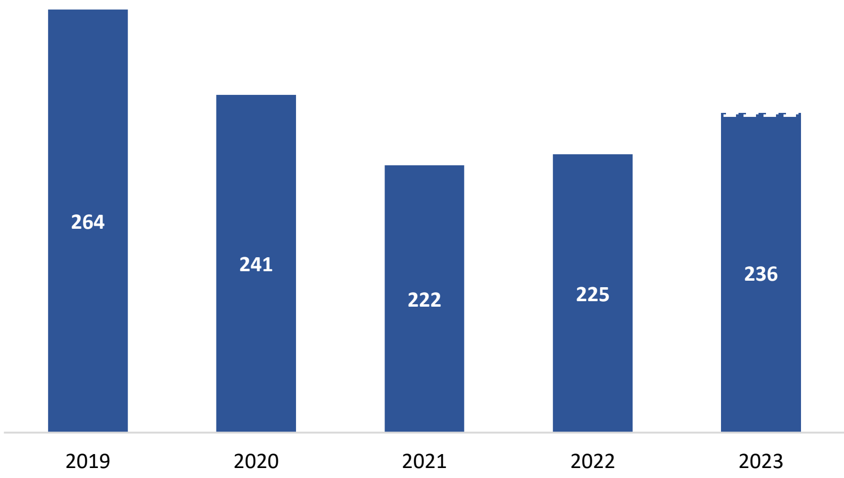
Overall, 80 businesses in Shrewsbury town centre changed between 2022 and 2023, which is the equivalent of a churn rate of 11%. This compares with churn of 14% between 2021 and 2022, 13% between 2020 and 2021 and 15% between 2019 and 2020. The churn rate was lower than the average for Shropshire in 2023, but notwithstanding this, change in Shrewsbury accounted for almost a quarter of all change that took place across the county in this year.

24% of all churn in 2023 arose as a result of new vacancies, with 38% being attributable to businesses taking occupancy of previously vacant premises. The proportion attributable to new vacancies is lower than it has been in the preceding three years.

Comparison Retail

The largest proportion of commercial units and space is dedicated to the comparison retail category, accounting for 31% of units and 32% of gross floor space. The number of stores operating is 236, which is 28 fewer than in 2019 (an 11% decrease). Despite this substantial decline there was a slight uplift in 2022, and significant recovery in 2023 with 10 new units in operation (11 including one unit in the new survey area). The range of different comparison good stores is wide—there is a choice of store in most sub-classifications. There is also a balance between independents and national chains. Shrewsbury is a location which attracts mid market and higher end chains due to its relatively affluent local population and its strong visitor economy but it also accommodates a range of lower end mass market and discount stores. It is a destination which attracts shoppers looking for comparison goods.

Chart 11: Number of Comparison Retail Units, 2019-2023

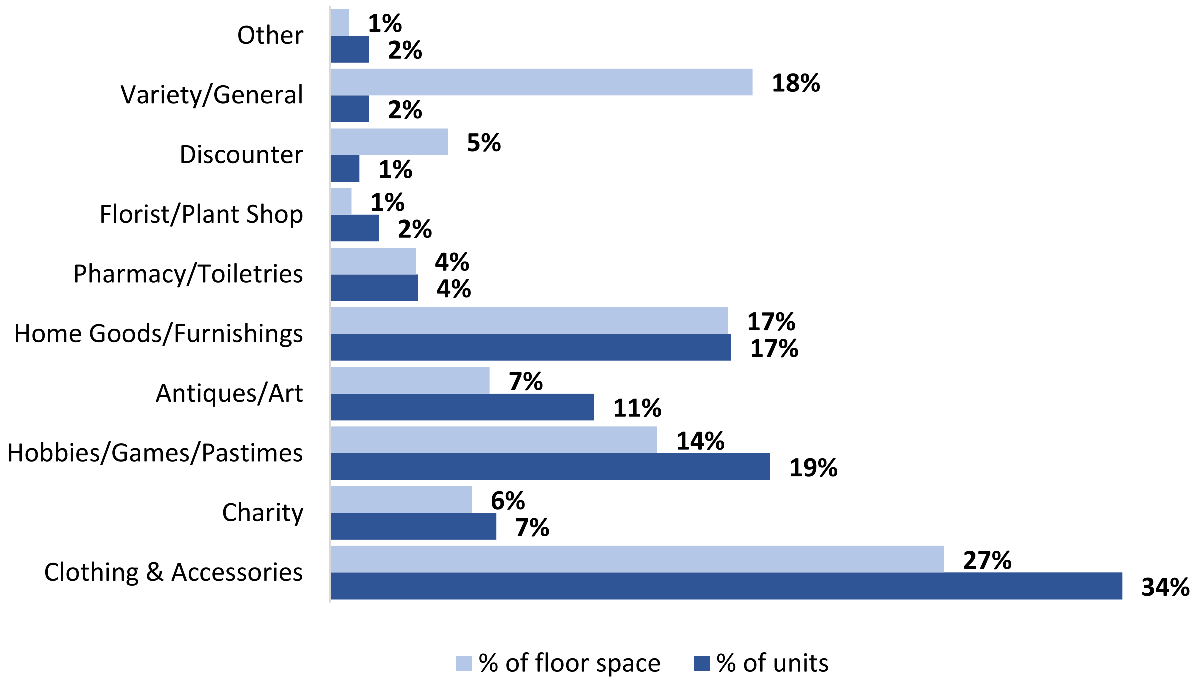


Shaded area represents Castle Foregate, which was not audited prior to 2023

With the exception of Ludlow, Church Stretton, Bishop's Castle and Whitchurch, comparison retail accounts for a higher proportion of commercial units in Shrewsbury than anywhere else in the county.

The following chart shows the breakdown of the comparison sector by broad classification. The highest proportion of the comparison offer is designated to clothing and ancillary products.

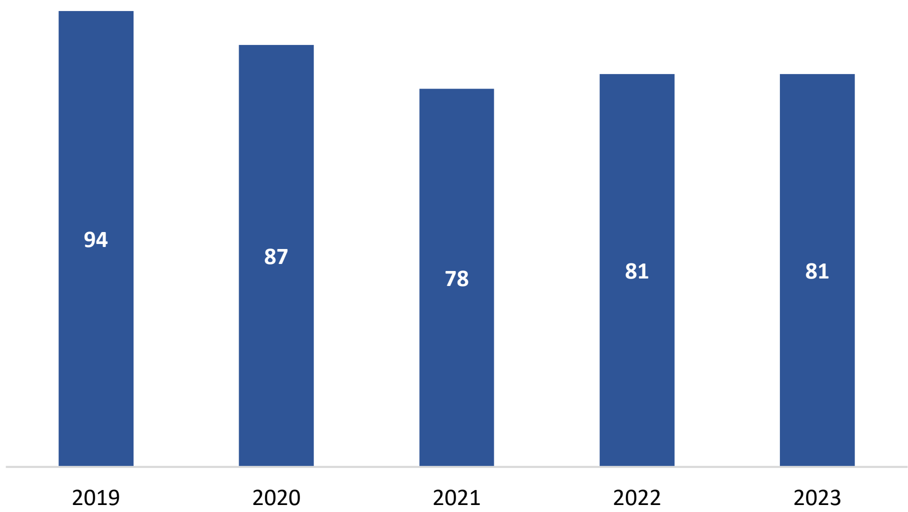
Chart 12: Breakdown of Comparison Retail by Type, 2023



Clothing and Accessories

Clothing and ancillary merchandise accounts for more than a third of all comparison stores in Shrewsbury, as well as 27% of gross floor space. This is the equivalent of 11% of all Shrewsbury commercial units. Within the clothing and accessories sector, there are bespoke men's, women's and children's clothes stores, unisex clothes stores, shoe shops, jewellery stores and stores selling a broader range of accessories (not just jewellery). Despite the range of stores operating, the sector has contracted since 2019 with 13 fewer stores trading. There was no change in the number of clothes stores in the town in 2023.

Chart 13: Number of Clothing & Ancillary Product Stores, 2019—2023



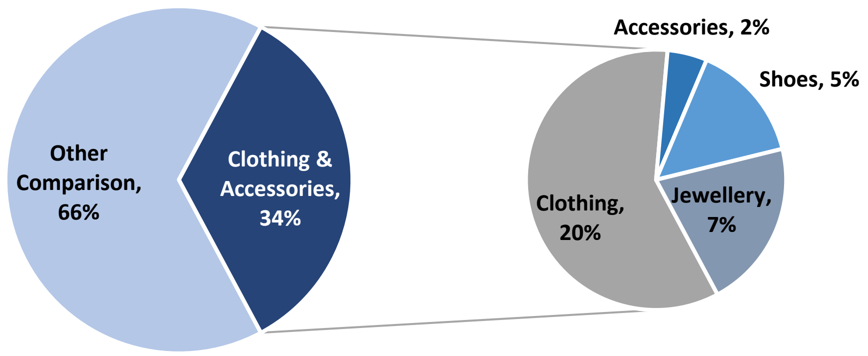
One in five comparison stores in Shrewsbury town centre is a clothes shop. 5% are shoes shops, 7% sell jewellery and 2% specialise in accessories.

Shrewsbury is clearly a location where people come clothes shopping, and there is a range of outlets from mass market (Primark, H&M, New Look) to mid-market chains (including Sea Salt, White Stuff, Jigsaw, Fat Face, French Connection). Common High Street brands such as Moss Bros and Majors are also represented. In total, there are 48 specialist clothes stores covering combined gross floor space of around 9,700m^2. Also selling clothes are Marks and Spencer (classified as a variety store) and Catalogue Surplus (categorised as a discounter). There were three fewer specialist clothes shop in 2023 than in 2022, with the town's branch of River Island amongst the closures.

There are a number of independent shoe stores as well as chains Clarks and Sketchers. Altogether, there are 12 shoe shops, covering a total of 1,600m^2 gross floor space. There was no change in the number of shoe shops in 2023.

There are 17 specialist jewellery stores in the town centre. These include national chains (H Samuel, TH Baker, Pandora for example) as well as several independents. The number of jewellery stores increased by three in 2023.

Chart 14: Breakdown of Clothing & Ancillary Product Stores, 2023



Hobbies and Games

There are 45 commercial units in Shrewsbury town centre specialising in the sale of goods related to hobbies and games, down from the 48 units which were trading in 2019. There was an upturn in the number of stores of this type trading in 2023, with four additional units operating compared with 2022. This sub-classification covers approximately 6,400m^2 of gross floor space. Within the comparison goods classification, hobbies and game stores account for 19% of units and 14% of floor space. Overall, this type of store accounts for 6% of commercial outlets in the town.

Chart 15: Number of Hobby/Games Stores, 2019—2023

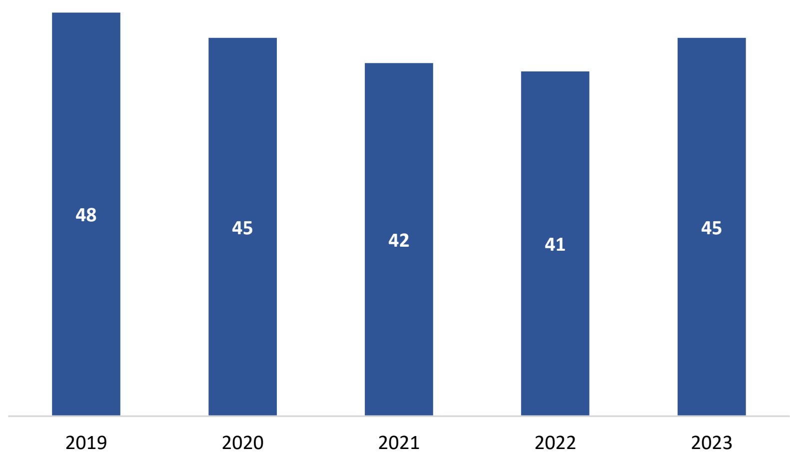
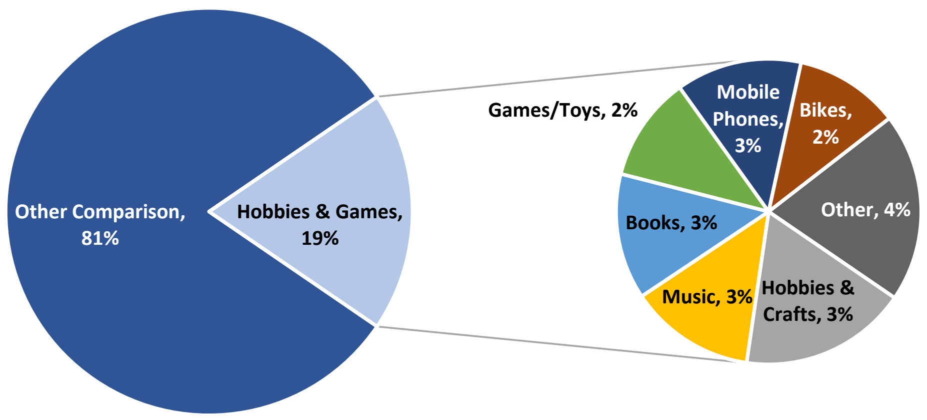


Chart 16: Breakdown of Hobby & Game Stores, 2023



There is a wide variety of stores classified under the hobbies and games banner. There are six book shops (including a branch of chain store Waterstone's) and six mobile phone stores (including O^2, EE, Three and Vodaphone). Mobile phone stores are clustered around Pride Hill. There are also six stores allocated to hobbies and to arts and craft.

There are five shops selling games and toys (traditional and electronic) and six purveyors of music products, CDs and DVDs. Two new music stores opened between the 2022 and 2023 audits.

Other stores in this classification include sports goods, out-door goods, DIY products and computer shops.

Household Goods

There are 41 stores in Shrewsbury town centre selling household furniture, goods and equipment. These cover approximately 7,800m^2 of gross floor space. This is the equivalent of 17% of all comparison units in the town and the same share of floor space. 5% of all units in the town are dedicated to home products. The number of stores in this classification rose by four in 2023 compared with 2022.

There are 11 furniture retailers in the town centre, with a cluster of furniture stores in Wyle Cop.

There are also nine stores selling products for the home (excluding large appliances, furniture and textile related products). These sell a range of products from cookware to glass and chinaware. There are 14 textile/soft furnishings stores (three new in 2023) and three shops selling carpets and/or rugs. Other stores included within this category are a domestic appliance provider, an ironmongers, a light fitter, picture frame sellers and a door and window specialist. Many of Shrewsbury's household goods stores—especially those selling furniture or large appliances—are located out of town.

Chart 17: Breakdown of Home Goods and Furniture Stores, 2023

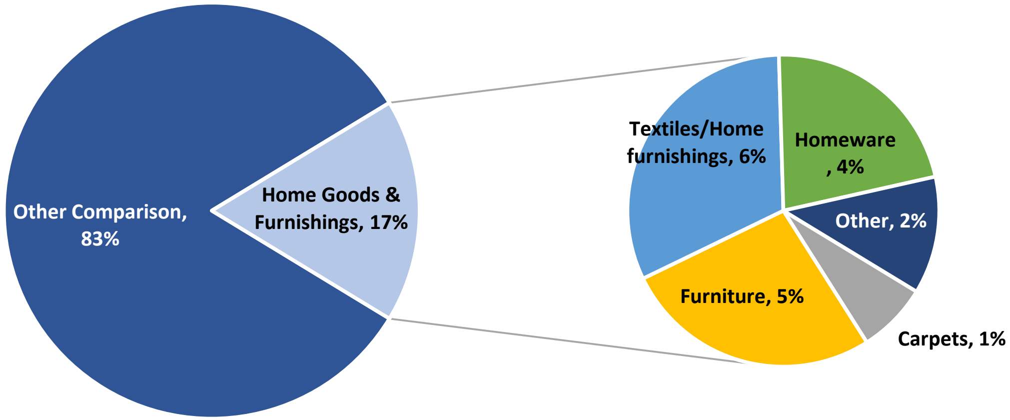
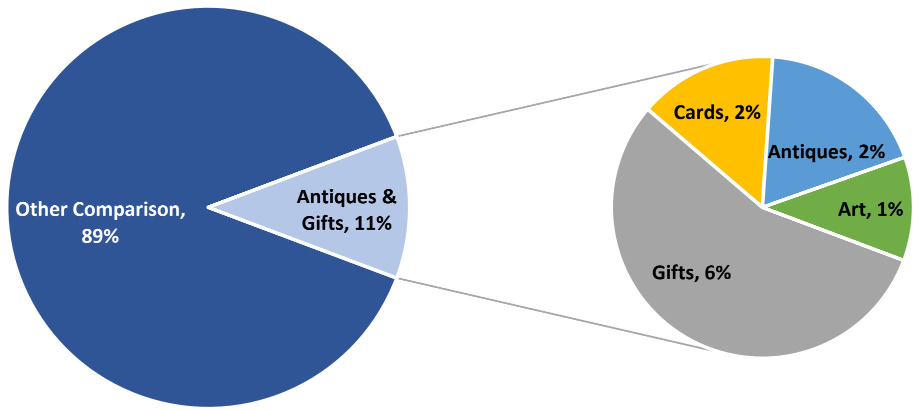


Chart 18: Breakdown of Antique/Gift Stores, 2023



Antiques/Gifts

There are 27 commercial units selling antiques, art, gifts, greetings cards or stationery, and together these account for just over 3,100m^2 of floor space. This is the equivalent of 11% of all comparison stores and 7% of all floor space within the comparison category.

There are 15 gift shops, five antique shops, three art shops/galleries and card shops/stationers. Antique stores tend to be located at the periphery of the town centre. Most stores in this classification are independent, although there are branches of the card retailers Card Factory and Clintons. Three new gift shops opened in 2023, but one card shop closed.

Charity Shops

There are 17 charity shops in Shrewsbury town centre, with these accounting for around 2,800m^2 of floor space. These account for 7% of all comparison goods stores and for 6% of their floor space. Overall, 2% of all commercial units in Shrewsbury town centre accommodate charity stores. There were six fewer charity stores in Shrewsbury in 2021 compared with 2020 but this crept back up with the opening of an additional outlet in 2022. There was no change in the charity sector in the original survey area in 2023, although there is an additional charity based in the extended area surveyed in 2023. The majority of stores represent national charities (Scope, British Heart Foundation, Save the Children, Oxfam, etc) but there are also some local charities in the mix (Shrewsbury Ark, Shropshire Cat Rescue, Severn Hospice). There is a cluster of charity shops on Mardol.

Discounters

There are three discount stores in Shrewsbury town centre. These stores are significantly larger than average, accounting for an average of 770m^2 each. Overall, discounters account for 5% of comparison floor space. The discounters are national brands—Catalogue Surplus Store, Wilko and Home Bargains. The branch of Wilko was due to close shortly after the audit took place in 2023.

Personal Care

There are nine stores offering personal care products, covering 1,700m^2 of floor space. These include four pharmacies (including Boots and Superdrug) and a number of cosmetics and toiletries outlets (including The Body Shop and L'Occitane).

Convenience Retail

There are 27 convenience stores within the main shopping area of Shrewsbury. The number of units and level of floor space allocated to this category is low, with the focus much more on comparison rather than convenience. The majority of Shrewsbury's convenience offer is outside the town centre. The offer has reduced since 2019, with three stores closing between 2019 and 2020 and a further three between 2020 and 2021 and two more in 2022. Three more closed in 2023, although there is one additional convenience store located in the new area surveyed. Overall, the offer has contracted by around a quarter since 2019. In 2022, convenience retail represented 4% of the overall Shrewsbury town centre offer in terms of the number of units and floor space. This is lower than in any other Shropshire town surveyed.

Map 10: Location of Shrewsbury's Main Out-of-Town Convenience Stores

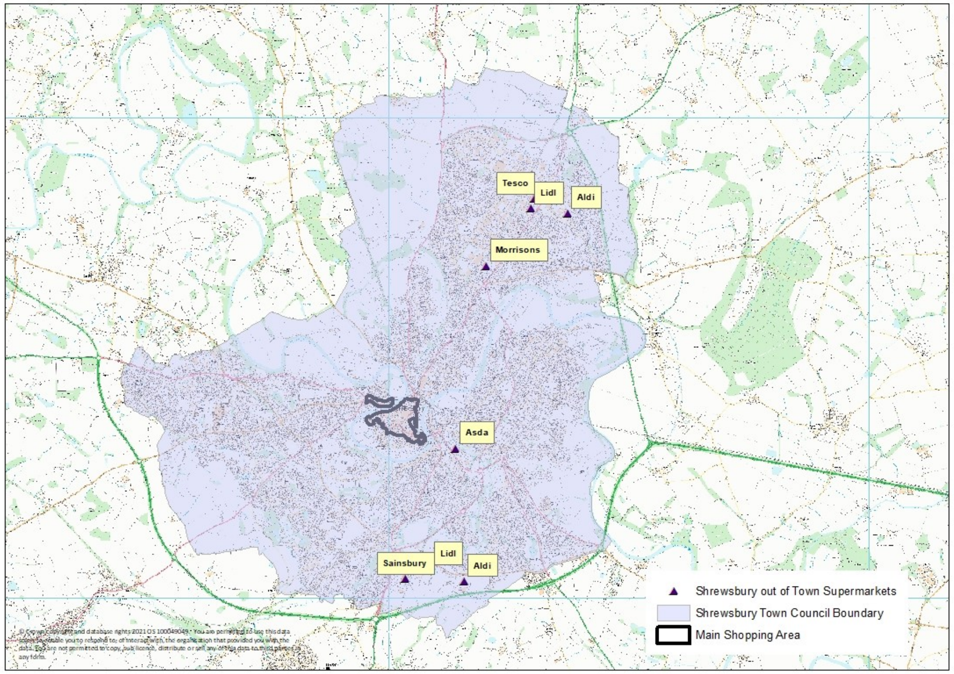
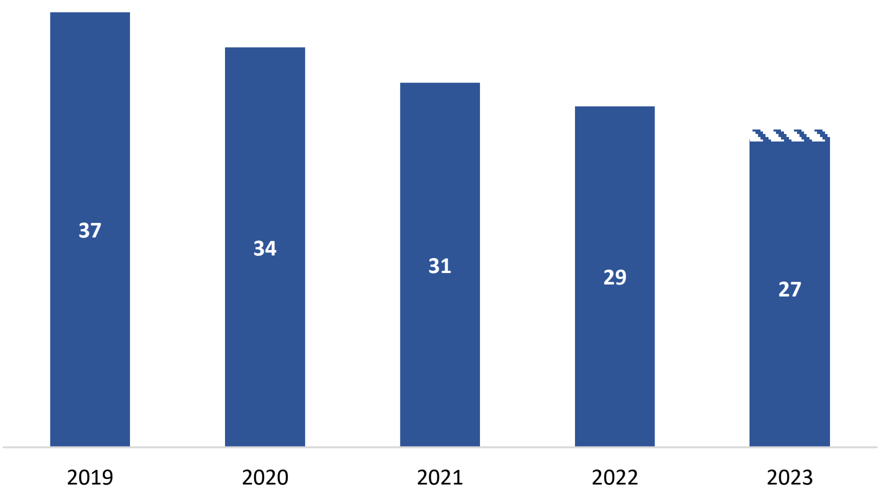


Chart 19: Number of Convenience Stores, 2019—2023



Shaded area represents Castle Foregate, which was not audited prior to 2023

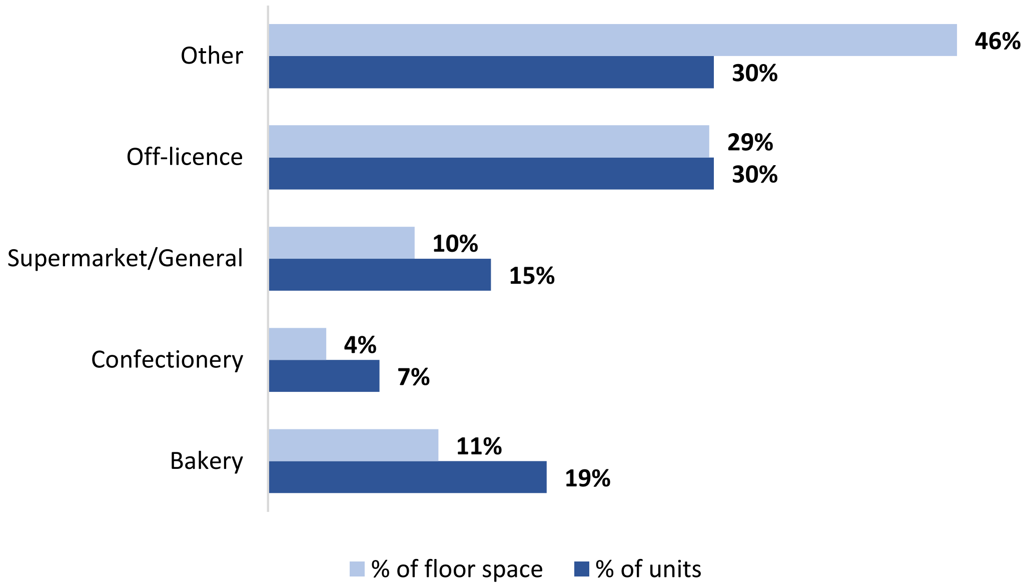
The town does benefit from a large indoor market which offers a range of convenience and other products; individual stall holders are not included within these totals.

At the time of the audit, the main supermarket convenience offer within the town centre was Tesco Express.

Outside the central shopping area, as shown on the adjacent map, the town benefits from a Tesco Extra, Morrisons, Lidl and Aldi to the north of the town centre. Asda is located just east of the town centre, while the south of the town is served by a Sainsbury's, an Aldi and a Lidl.

As well as the supermarket, the town centre is also home to three other general food stores, five bakeries, two confectioners and eight off-licences. There is also a health food store, a delicatessen, a greengrocer, a tobacconist, a newsagent and a frozen food store. Between the 2022 and 2023 audits, two bakeries opened, but this was offset by the closure of a greengrocer, a butcher, a tobacconist and two confectionery stores. There is also an indoor market, which accommodates numerous stalls, including a wide variety of convenience products. This enhances the overall convenience offer within the town centre. The variety store Marks & Spencer also has a food department.

Chart 20: Breakdown of Convenience Stores by Type, 2024



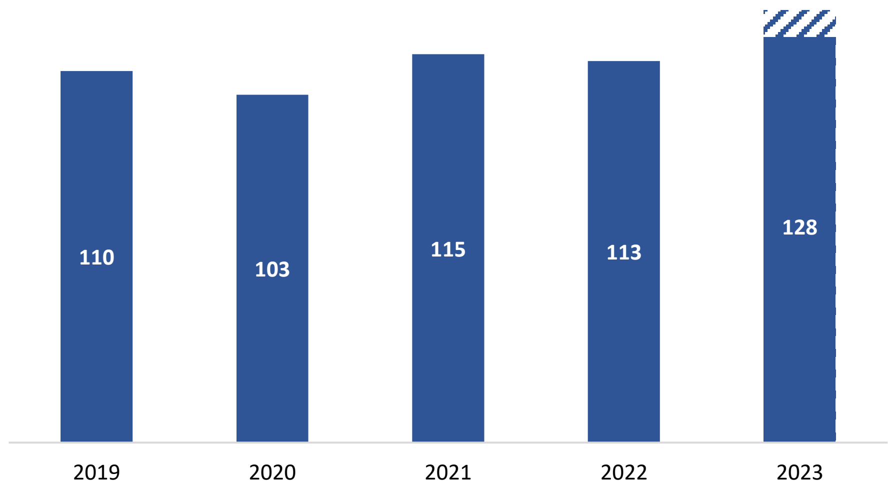
Most operators in the convenience retail category are independent, although the chains Greggs, Hotel Chocolat and Holland & Barrett are all present. Greggs incorporates a small café as well as selling bakery products.

Restaurants & Takeaways

17% of units in Shrewsbury are attributable to restaurants and takeaways, with this category accounting for a lower proportion of gross floor space (12%). The 128 units equates with floor space of around 17,400m^2. The representation of restaurants and takeaways in Shrewsbury is higher than any where else in the county except Highley.

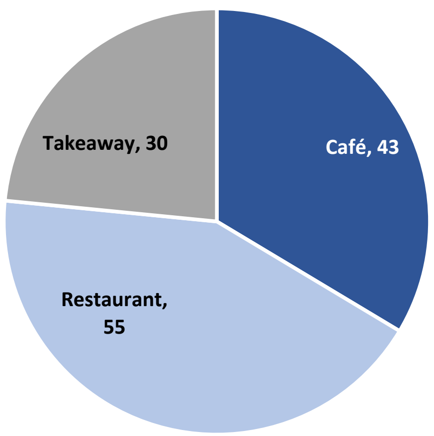
While the number of units in this classification fell by seven in 2020 compared with 2019 (-6%), the sector recovered strongly in between 2021 and 2023. There are eight units in the newly surveyed area, but the sector nonetheless expanded by 13 units in 2023 compared with 2022 (with seven additional operators in the original survey zone).

Chart 21: Number of Restaurant/Takeaway Units, 2019-2023



Shaded area represents Castle Foregate, which was not audited prior to 2023

Chart 22: Breakdown of Restaurant/Takeaway Units by Type, 2023



Units are split between cafés (34%), restaurants (43%) and takeaways (23%). Takeaways account for a lower share of floor space (14%) while restaurants have a disproportionately high share of floor space (54%). There is a cluster of takeaways in the additional survey area in Castle Foregate.

A very wide variety of cuisines are represented within the Shrewsbury restaurant sector, including British, European, Chinese, Indian, Italian, Japanese and Thai. There are also several restaurants specialising in vegan food. Although the majority are independent, there are a number of chains, including Ask, Pizza Express and Cote Brasserie. A number of chain restaurants, including Carluccio's and Loch Fyne closed between 2019 and 2020 but independents have emerged to take their place. Five restaurants have opened in Shrewsbury since 2022.

Within the takeaway sector, there is a large number of sandwich bars which serve the workday population. There are also, amongst others, fish & chip shops and pizza shops. Within the café sub-sector, most are independent, although there are branches of Costa, Caffe Nero and Starbucks.

Tourism & Leisure

The number of businesses operating within the tourism & leisure area in Shrewsbury town centre rose from 48 in 2022 to 55 in 2023 (although five of these are located in the newly audited Castle Foregate area). The classification now accounts for 7% of all commercial units in the town centre. Units in this classification tend to be large, and as such accounted for 13% of gross floor space in 2023.

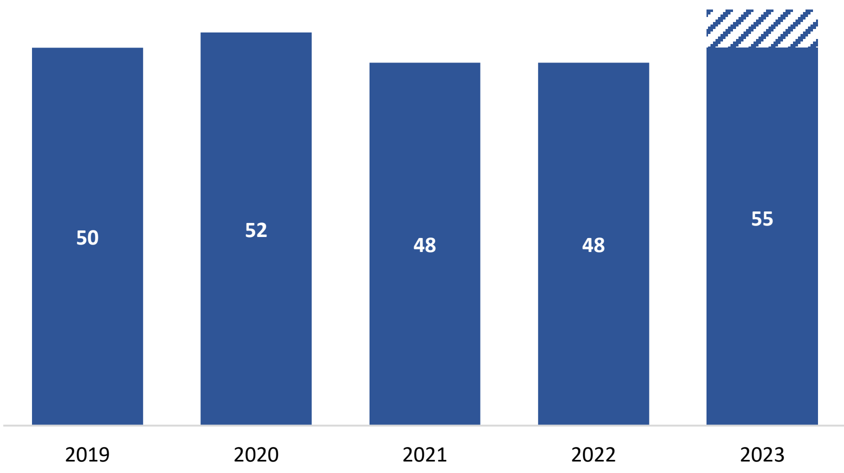
Within the hospitality sector, there are 29 public houses and bars. These take up approximately 7,600m^2 gross floor space, the equivalent of 5% of all floor space in the town. In addition, Shrewsbury accommodates a number of other tourism and leisure facilities, including eight hotels/ guesthouses. Some of the public houses may also offer overnight accommodation. Most of the smaller hotels/guesthouses are independent; however, there is a Premier Inn in the town centre, as well as the Shrewsbury Hotel, which is part of the Wetherspoons' chain.

The town has gained a B&B in the centre of town since 2022.

There are four health clubs/gyms including a personal trainer, as well as a number of entertainment venues, including a museum, a theatre, a cinema, a night club and a bingo hall.

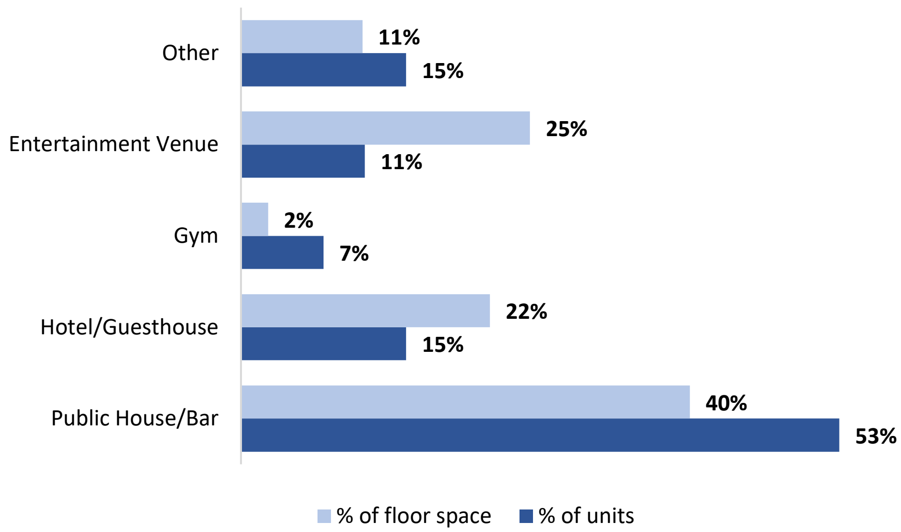
Just outside the town centre boundary are other important tourism assets for the town, including Shrewsbury Castle and Regimental Museum, the Quarry Park, the Shropshire Wildlife Trust and Shrewsbury Abbey.

Chart 23: Number of Tourism & Leisure Operators, 2019-2023



Shaded area represents Castle Foregate, which was not audited prior to 2023

Chart 24: Breakdown of Tourism & Leisure Operators by Type, 2023



Finance & Business Services

There are 56 commercial operators in the finance, professional and business services sector in Shrewsbury town centre, accounting for approximately 7,900m^2 of gross floor space. This represents an increase of one since 2022, although this includes two units in the new audit area, so within the original boundary the number has fallen by one. Included within this classification are nine banks/building societies (Barclays, HSBC, Lloyds, Nationwide, Halifax, West Brom, Nat West, Principality, Santander). The Shrewsbury branch of the TSB closed between the 2021 and 2022 audits. There are also 18 estate agents/property services providers, four financial service providers, six solicitors and two accountants. Also represented within the town are architects, a cash broker, insurance brokers, printing services, surveyors and consultancies. With the exception of banks/building societies, this classification is under-represented in Shrewsbury: in part this is because many businesses have relocated from the town centre to out-of-town premises on business parks.

Chart 25: Breakdown of Finance & Business Services by Type, 2023

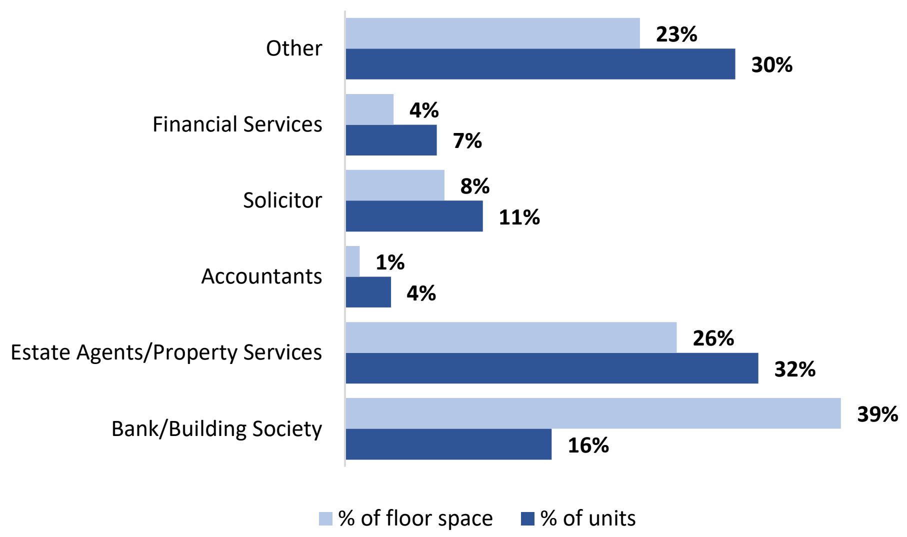
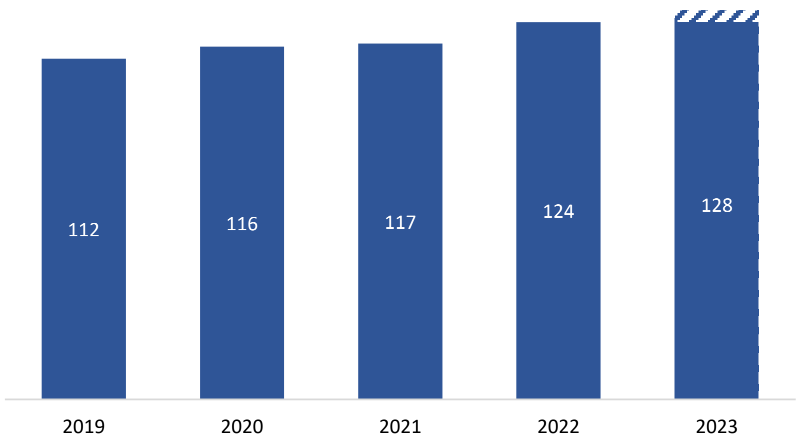


Chart 26: Number of Retail Service Units, 2019-2023



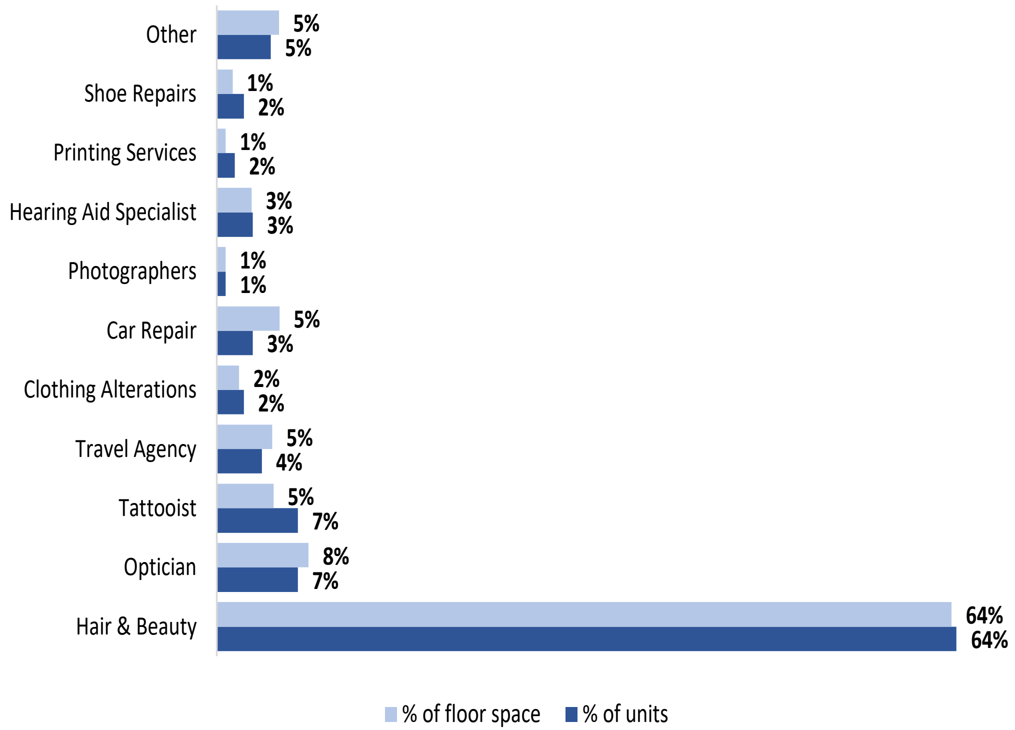
Shaded area represents Castle Foregate, which was not audited prior to 2023

Retail Services

There are 128 retail service businesses operating in Shrewsbury town centre, with these accounting for over 12,900m^2 of gross floor space. Of the 128 units, 124 are located within the original study area (no change over 2022) and four are in Castle Foregate.

Despite an overall reduction in the number of commercial units in the town centre since 2020, the number offering a retail service has increased steadily since 2019, rising in total by 12 units (+11%) over the four year period (excluding units in Castle Foregate). By 2023, retail services accounted for the second highest proportion of commercial units behind comparison retail, taking a share of 17%.

Chart 27: Breakdown of Retail Services by Type, 2023



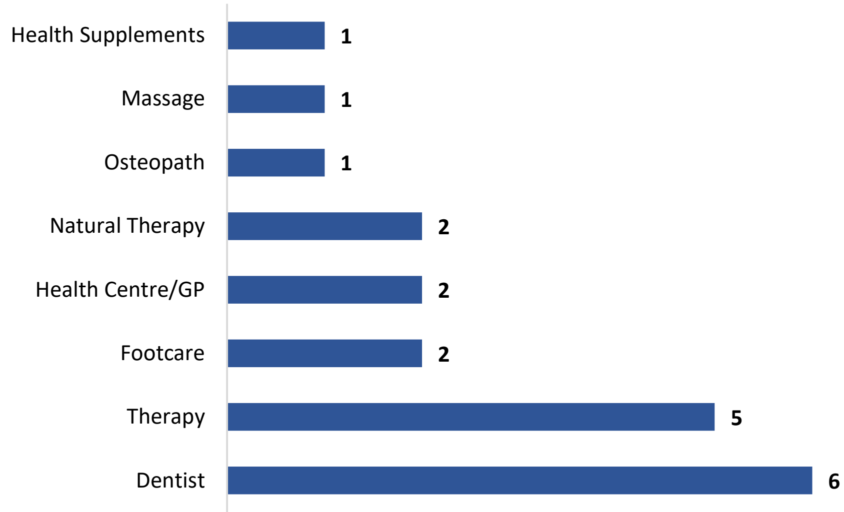
Although the range of services provided is wide, a very high number of operators are in the barber and hair/beauty salon classification, with these together representing 64% of units and 64% of floor space. There are 69 hair dressers/beauty salons and 13 barbers. The majority are independent, although there are branches of Toni & Guy, and Franscesco's (a small local chain). In addition, there are nine opticians (including the chains Vision Express, Boots and Specsavers) of which one was new in 2023, five travel agents, nine tattoo parlours (two new) and three stores offering clothing alterations.

Other operators include a bookmaker, funeral director, shoe repair, computer repair, printing services and photography.

Health

There are 20 premises accommodating health care practitioners, taking up around 3,800m^2 of floor space. There are six dentists, five offering counselling services, two footcare specialists and two medical centres/GP surgeries and two natural therapy providers. There is also a massage parlour, a provider of health supplements (new) and an osteopath.

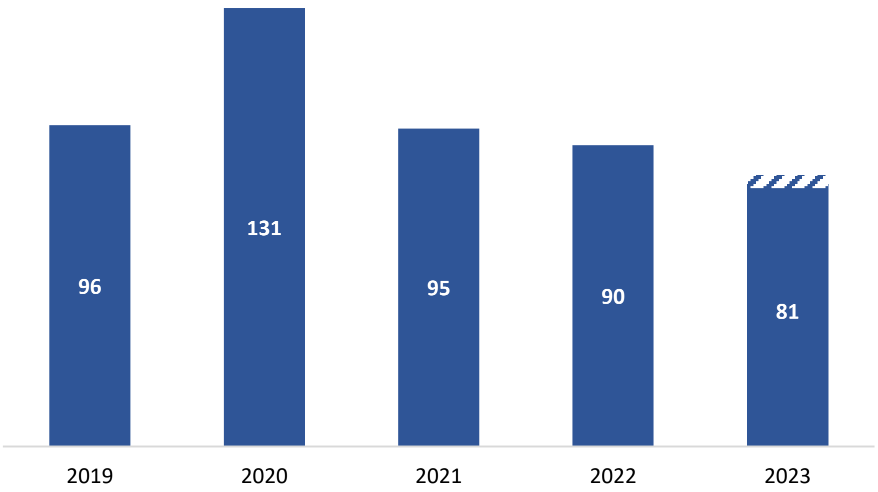
Chart 28: Number of Health Care Providers by Type, 2023



Vacant Units

At the time of the September 2023 audit, there were 81 vacant units in Shrewsbury, accounting for around 15,500m^2 of gross floor space. This is the equivalent of 11% of units and floor space. This rate is on a par with the average for Shropshire but is lower than the national average, which stood at 13.9% in the second quarter of 2023 according to BRC (based on high street figures only). In addition, the number of vacancies has fallen significantly over the last two years from 131 vacant premises at the peak of the pandemic in 2020. There were 36 fewer vacant premises in 2021 and the tally dropped by a further five in 2022. In 2023, the number fell by a further nine (by 13 in the original survey zone, but offset partially by four vacant units in Castle Foregate). The closure of the Pride Hill Centre and ensuing decrease in the amount of commercial space in the town will have accelerated the overall reduction in empty premises as some previously vacant units are no longer classified as commercial. Businesses locating from the Pride Hill Centre to other parts of the town will also have pushed the overall vacancy level down.

Chart 29: Number of Vacant Units, 2019-2023



During the pandemic, the county town was been particularly impacted by the higher presence of chains than other towns in Shropshire, with a number permanently closing. During 2021 and 2022, a number of independents opened to take their place. Historically, units have not tended to stay vacant for long, particularly along Wyle Cop. Business churn tends to be higher in the shopping centres, particularly as they often attract seasonal stores.

23% of all vacant units in Shrewsbury in 2023 had become unoccupied since the audit took place in 2022. 38% of units had been vacant since 2020 when the town was significantly impacted by the pandemic.

16 stores in the town have been vacant since t least 2019 (a fifth of all current vacancies)'

The largest long-standing vacant premise is the old House of Fraser store along the High Street, which has been unoccupied since January 2019. This is also the largest vacant premise in the town. Vacant units range in size from 20m^2 to 1,260m^2.

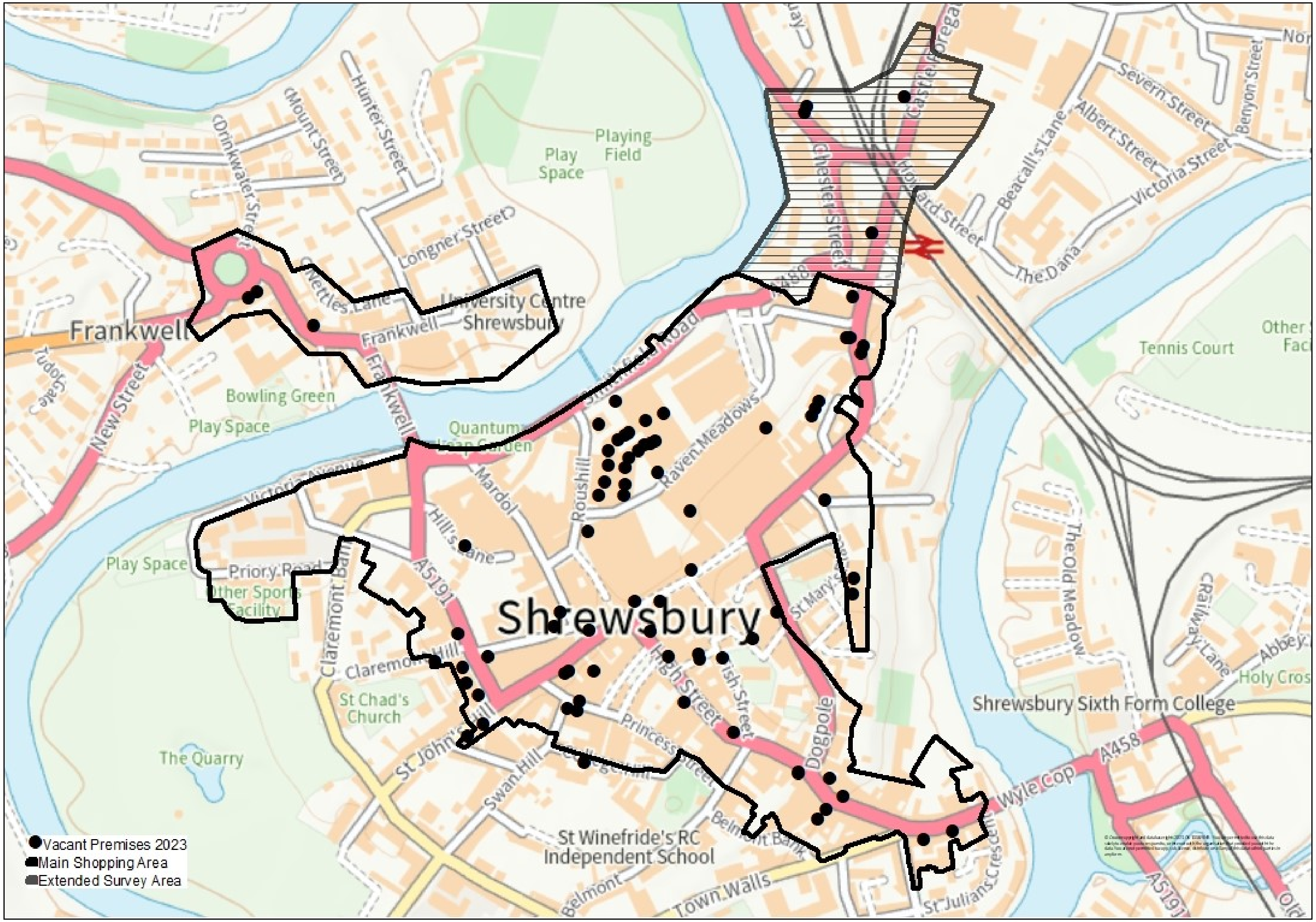
Chart 30: Vacancy Rates by Zone, 2023

Shopping Zone	Vacancy Rate	% of all Shrewsbury Vacancies
Castle Street	11%	21%
Frankwell	5%	4%
High Street & The Square	9%	15%
Mardol & Barker Street	9%	19%
Pride Hill & Centres	20%	30%
Smithfield Road	9%	2%
Wyke Cop & Dog Pole	8%	10%

The table opposite shows the location of Shrewsbury vacant premises by zone (see Map 9). The highest proportion of vacant commercial premises in Shrewsbury are located in Pride Hill & the Shopping Centres (30%). Castle Street/Castle Foregate accounts fore 21% while the High Street & The Square account for 15% of vacancies, with 19% in Mardol & Barker Street.

In terms of vacancy rates, the proportion of units which are vacant is much higher in the Pride Hill and the Shopping Centres, with a fifth unoccupied. This rate is dragged down by the very high level of vacant units in the Riverside Mall. The rate of vacancy is much lower in Frankwell on the outskirts of the town centre and is also lower than the average for the town in Mardol & Barker Street, High Street & Square, in Smithfield Road and in Wyle Cop/Dog Pole.

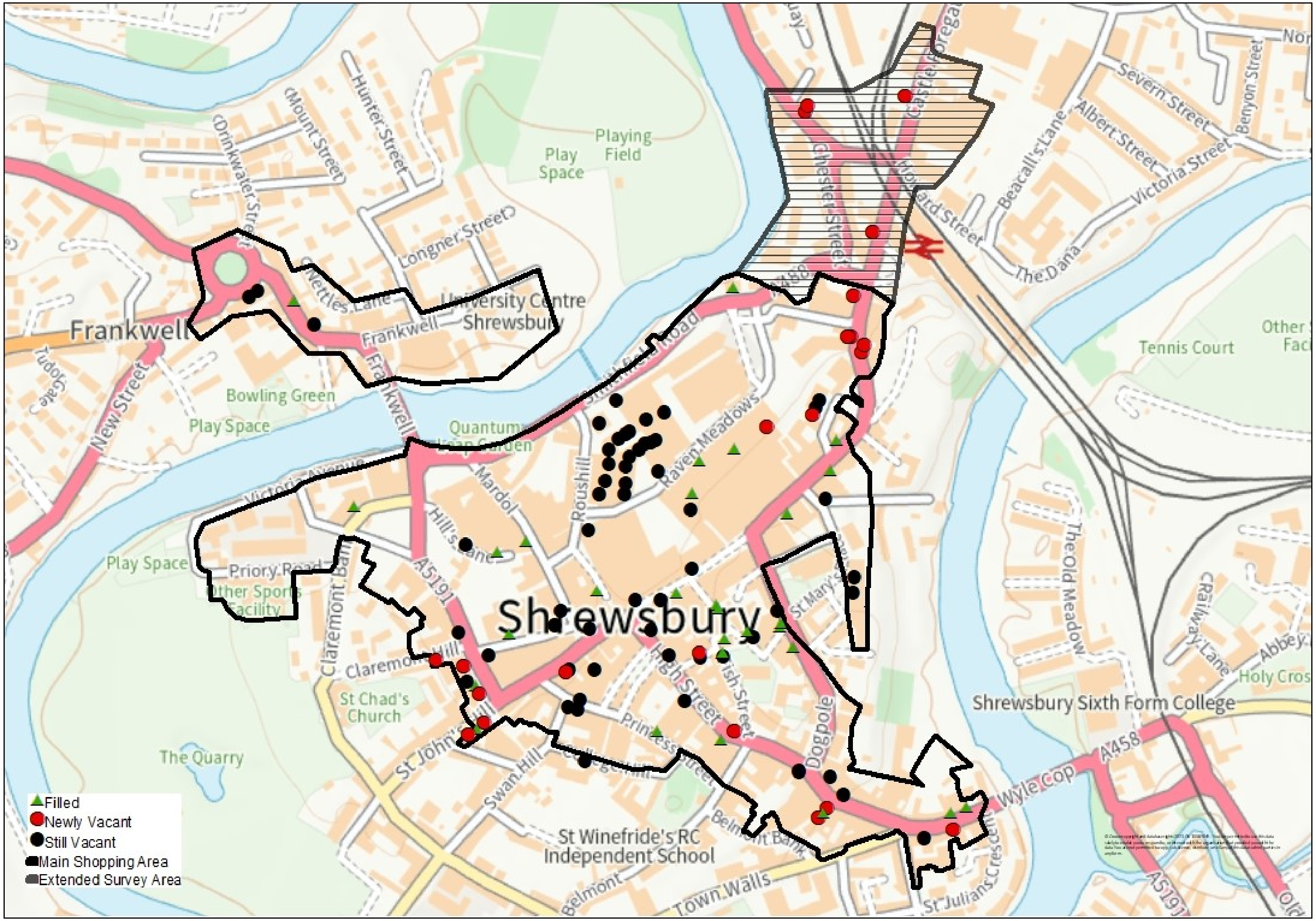
Map 11: Location of Vacant Commercial Premises, 2023



Please note: Shopping centre vacancies not plotted with accuracy

Of the 90 premises that were unoccupied in 2022, 30 had been filled by 2023, two were no longer functioning as commercial premises and 58 were still vacant. There were 19 new vacancies recorded in 2023, and there were also four vacant premises in the new survey area.

Map 12: Change in the Number & Location of Commercial Units, 2022-2023



Please note:
Shopping centre
vacancies not

Residential Premises

Although the town centre is predominantly a commercial zone, there is also a significant amount of residential property within the main shopping centre. In total, 1,058 residential premises are located within the scope of the audit (including the extended survey area in Castle Foregate). The majority are flats (956 or 90%). These are largely located above retail or other commercial outlets. There are 90 terraced houses in the area, which is the equivalent of around 9% of all housing stock in the town centre. There are clusters of terraced housing in Frankwell and also around Castle Street. Semi-detached and detached premises account for less than 1% of town centre housing stock. Not surprisingly, there is an absence of residential property in the very centre of the town along Pride Hill and in the vicinity of the shopping centres. Overall, the number of residential premises within the main Shrewsbury shopping area has been increasing slightly year-on-year.

Map 13: Location of Residential Premises in Shrewsbury Town Centre

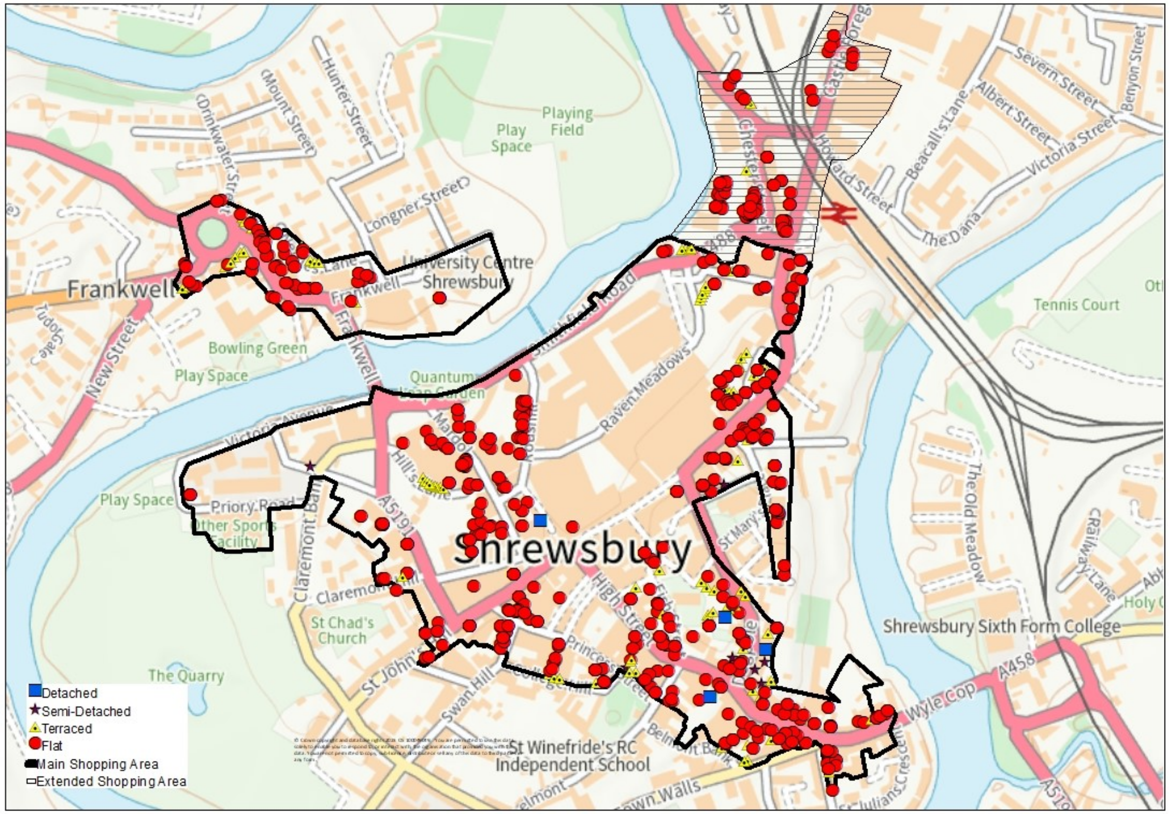


Chart 31: Breakdown of Residential Properties by Type