

# Whitchurch: Town Centre Audit Analysis, 2023



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## Introduction

An audit of businesses operating in Whitchurch'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. Whitchurch centre was first audited in July 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 into 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

- 127 commercial units, occupying 15,500m<sup>2</sup> gross floor space
- 6th largest centre in Shropshire accommodating 4.9% of all Shropshire High Street traders—smallest of the tier 2 towns (marginally smaller than Market Drayton)
- Relatively low number of stores per head of population at a rate of 12 units per 1,000 population (1,468m<sup>2</sup> per 1,000 population)
- Average store size 122m<sup>2</sup> which is similar lower than the average across Shropshire (147m<sup>2</sup>)
- 146 residential premises in the main shopping area, giving a ratio of 0.9:1 commercial versus residential properties
- Whitchurch had a 17% business churn rate between the 2022 and 2023 audits, which compares with 11% churn in each of the previous two years
- 9% of all commercial premises were vacant in 2023, which is lower than the Shropshire average (11% in 2023)
- The number of vacancies has been in decline since 2020
- The highest proportion of commercial units is attributable to comparison retail (33%)
- Retail services and restaurants/takeaways are also slightly over represented
- In contrast, there are comparatively few businesses operating in convenience retail (6% of the total) and in finance/business services (5%)

## 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. In Whitchurch a main employment hub, Whitchurch Business Park, is outside the scope of this audit.

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.

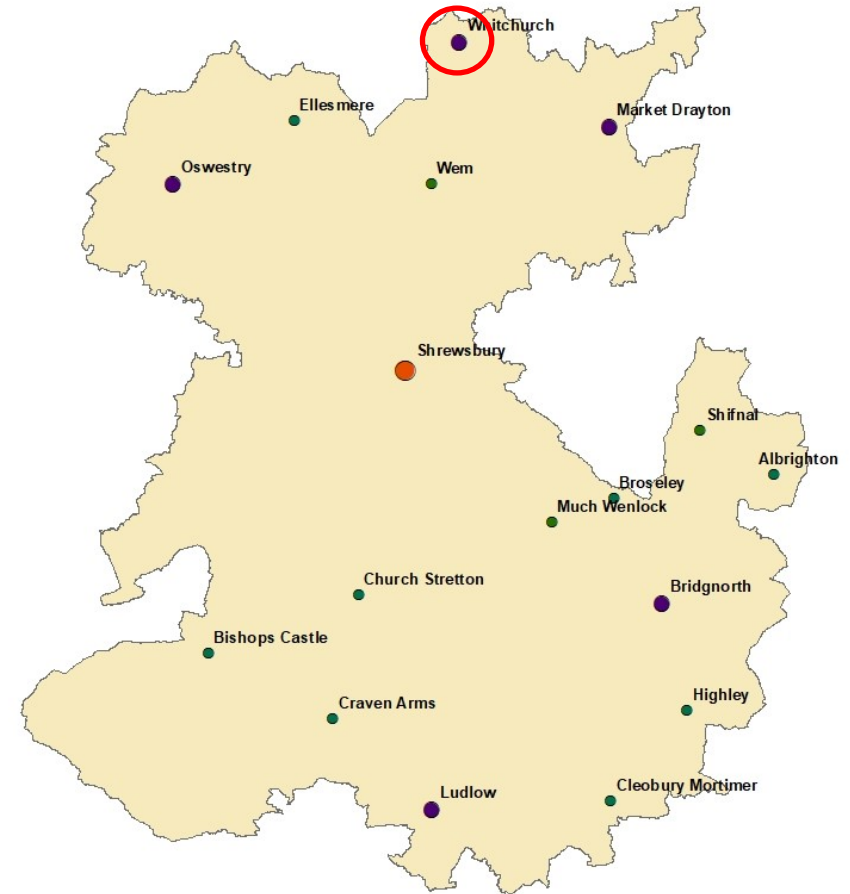
However, not all centres have comparable functions. Larger centres tend to attract workers and shoppers from much further afield than smaller centres, and consequently offer a much greater volume and variety of retail trade and consumer and business services.

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

Whitchurch is a similar size to Market Drayton—notably larger than most of the tier 3 centres, but smaller than Bridgnorth, Ludlow and Oswestry.

Map 1: Shropshire's Main Retail Centres



## About Whitchurch

Whitchurch is located in the north of Shropshire. It has been inhabited since Roman times, and today has a population of 10,142 and 4,573 households (*2021 Census*). The town's population has grown by 2.7% since 2011. Whitchurch has recently overtaken Ludlow as the fifth largest market town in the county in terms of the size of its resident population.

The town has Cheshire to the north, Stoke to the east, Shrewsbury to the south and Oswestry to the west. It is accessible via the A495 heading west to Oswestry (20 miles), the A525 east to Stoke (25 miles), the A41 north to Chester (21 miles), the A49 north to Warrington (39 miles), the A41 south to Newport (20 miles) and on to Wolverhampton (40 miles) and the A49 south to Shrewsbury (20 miles). The total population within an 10 mile radius is approximately 84,100.

Whitchurch is also on the national rail network on the Manchester to Shrewsbury line.

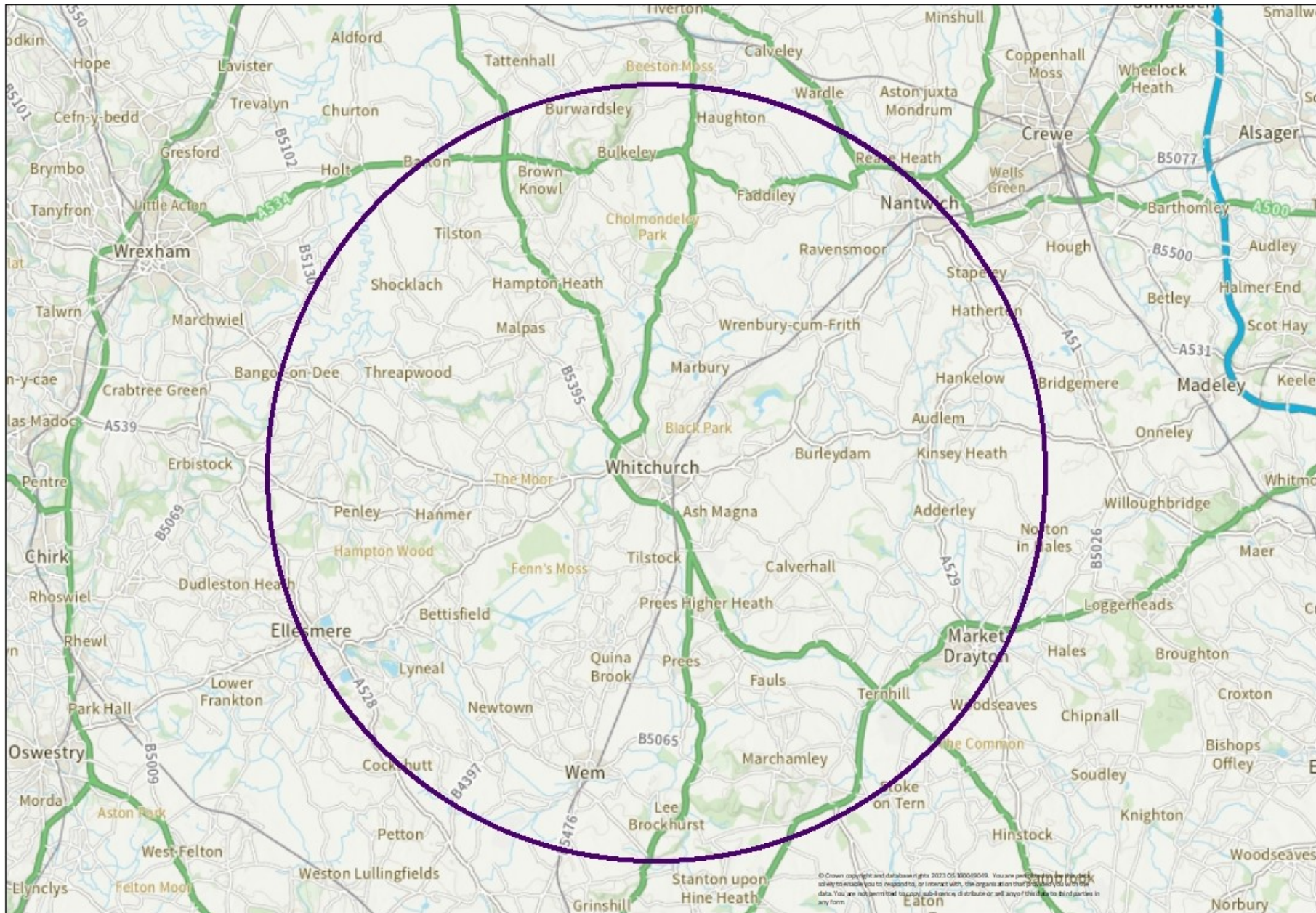
Whitchurch is an important employment hub, providing approximately 4,200 jobs across the town council area (*ONS Business Register and Employment Survey, 2022*). Key sectors include:

- Retail (17.8% of jobs)
- Health (15.4% of jobs)
- Manufacturing (11.9% of jobs)
- Transport & storage (10.7% of jobs)
- Accommodation and food services (10.1% of jobs)

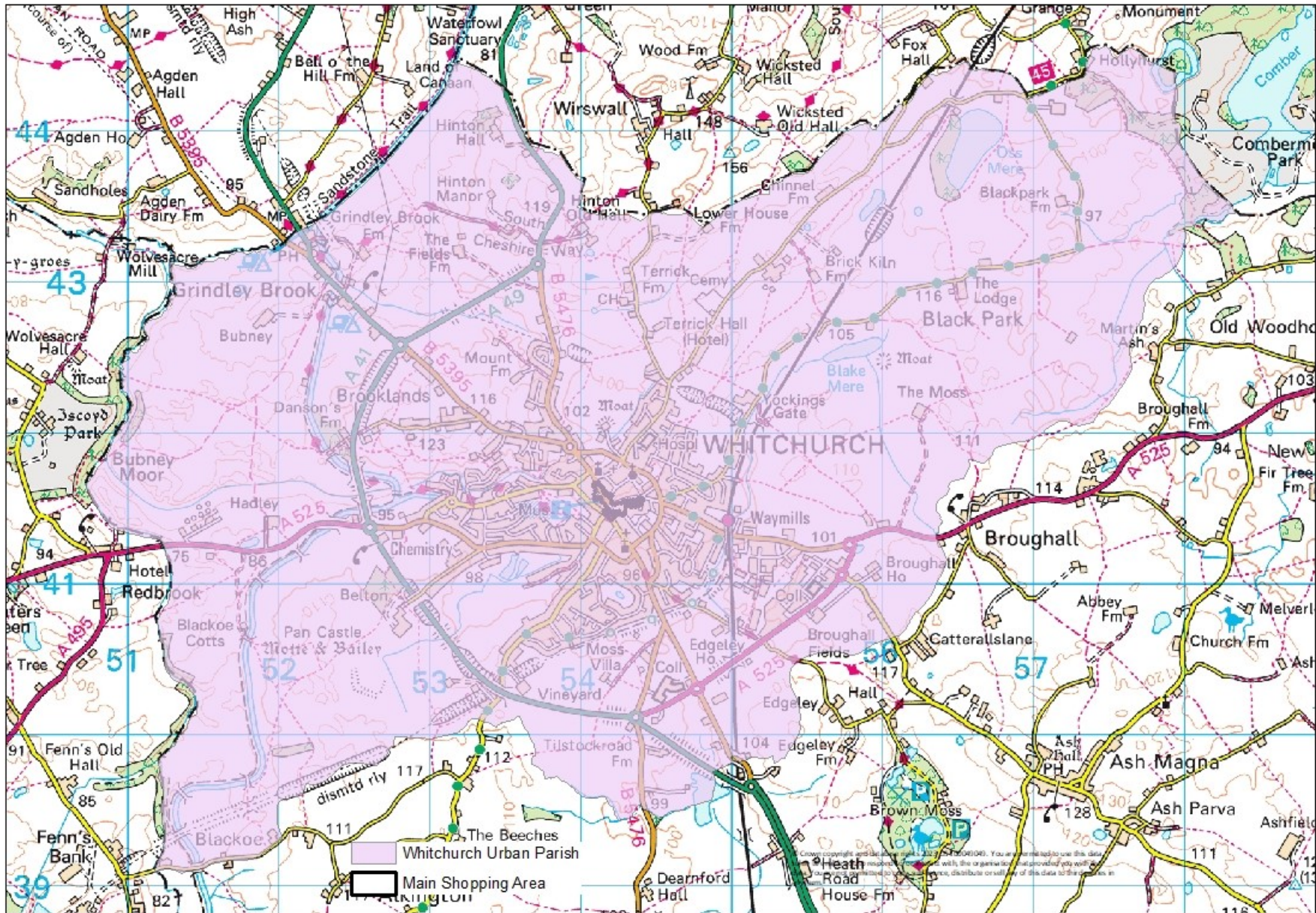
Overall, Whitchurch town council area (depicted on Map 3) covers an area of 2,381 hectares. The main shopping area (depicted on Map 4) is much smaller than this, at around 2 hectares.

The town comprises predominantly independent retail, although the centre is large enough to have attracted a number of chains, particularly in the comparison retail and financial and professional service sectors. A market is held every Friday at the Civic Centre and Market Hall offering a wide variety of stalls. The Saturday Makers Market, held on the first Saturday of each month, showcases artisan crafts, homemade producers and tasty food from the local area.

Map 2: Location of Whitchurch, showing 10 mile radius



Map 3: Whitchurch Town Council Area



Map 4: Main Retail Shopping Area





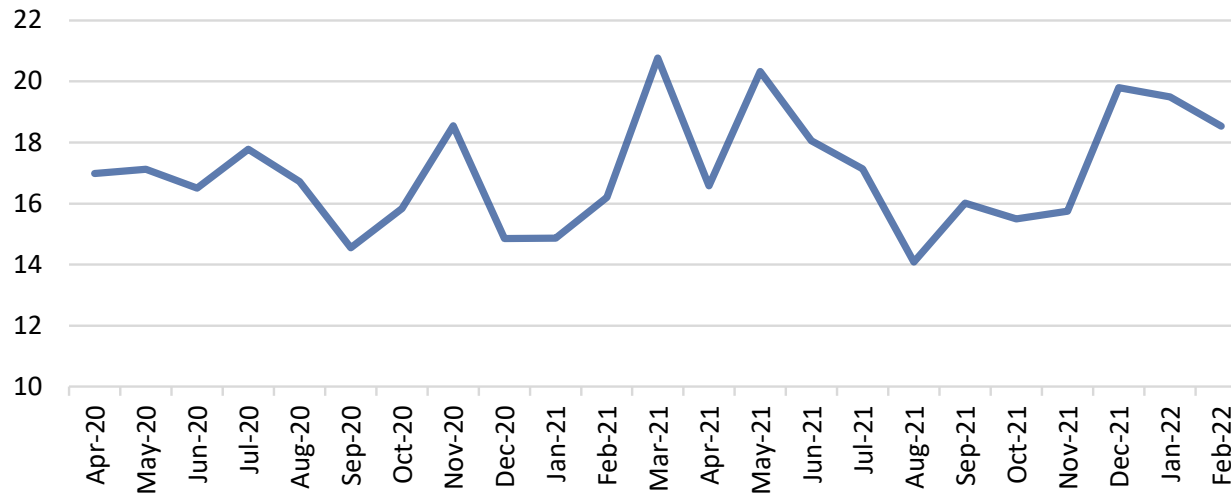
## Catchment and Footfall

The map on the following page shows the main catchment for Whitchurch town centre. It covers the town itself and a substantial hinterland that stretches into Wales and Cheshire to the north, to Ellesmere in a westerly direction and towards Shrewsbury to the south. Overall, the area includes eight postcode districts.

The total population within the catchment is 133,968 people which is the sixth largest in Shropshire. The average catchment distance is relatively short at 7.75 miles.

The chart below shows the percentage of the catchment population visiting Whitchurch at least once a month since April 2020. The conversion rate has ranged between 14.1% (August 2021) and 20.8% (March 2021).

*Chart 1: Catchment Conversion (%)*

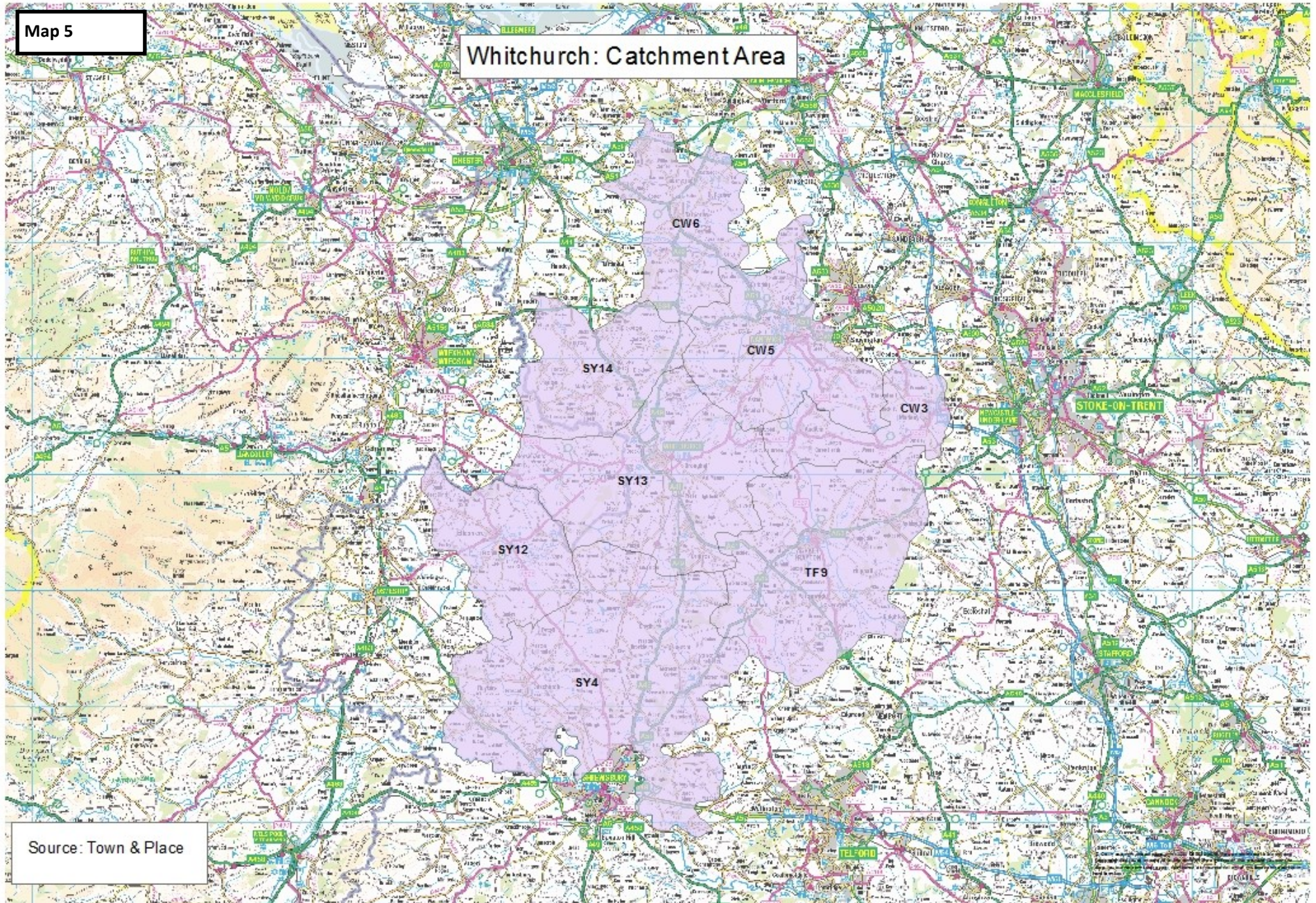


*Source: Town & Place AI*

*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

# Whitchurch: Catchment Area



Source: Town & Place

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

The overall catchment conversion stood at 18.5% in February 2022. However, this ranges from more than two-thirds in SY13 to less than 5% in CW5. The town itself is in SY13.

Overall, 59% of visitors to Whitchurch originated from the three postcode districts that make up the core catchment (SY13, SY14 and SY12). This proportion is relatively low. The remainder of the catchment accounts for 27% of visitors, with the remaining 14% representing visitors from further afield.

Chart 2: Breakdown of Visitors to Whitchurch, February 2022

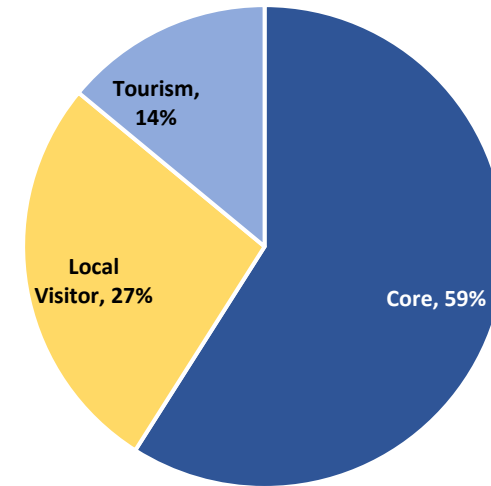
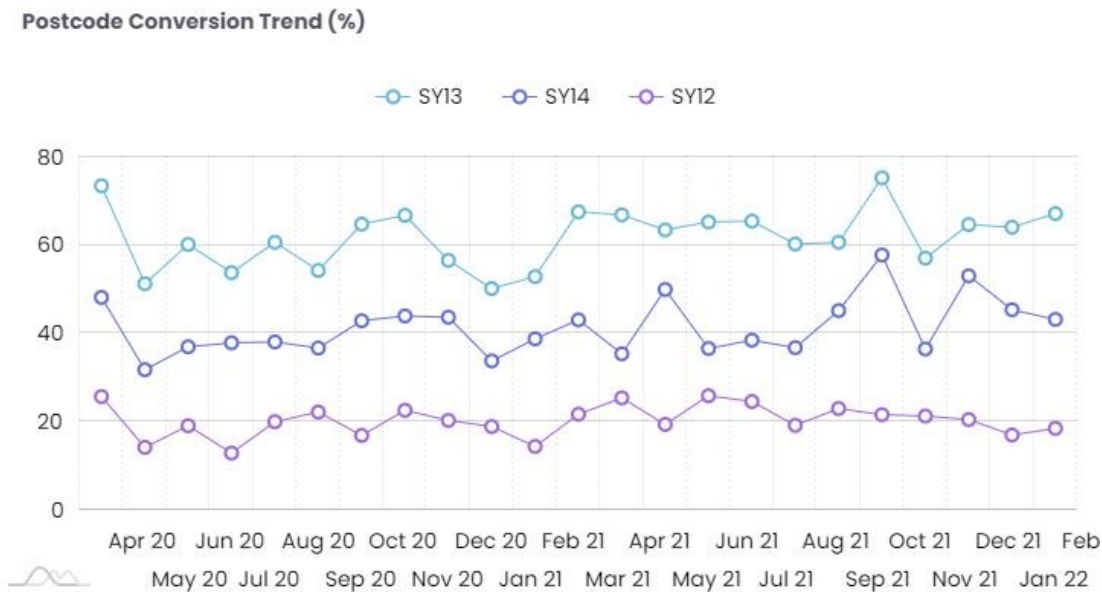


Chart 3: Trends in Whitchurch Postcode Conversion

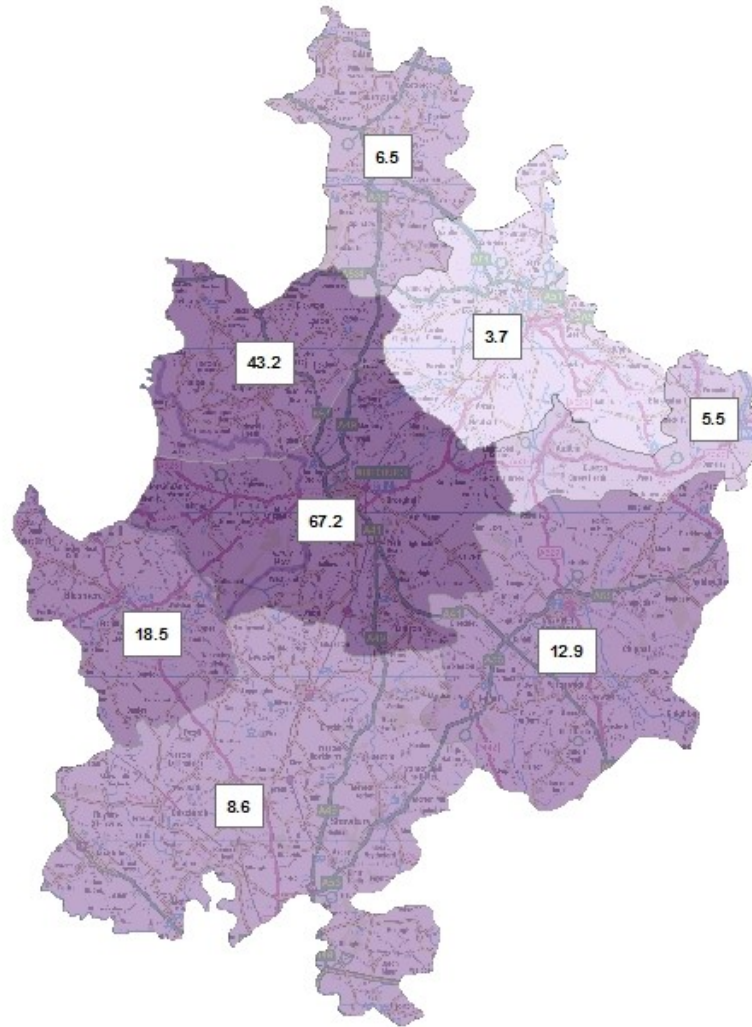


The adjacent chart shows trends in postcode conversion of the Whitchurch core catchment area. It shows that conversion from the core postcode districts SY12, SY13 and SY14 have followed a similar trajectory since April 2020 and compared with other towns have been subject to a lower level of fluctuation. Conversion rates are highest in SY13, where the town centre itself is located.

Source: Town & Place AI

Map 6

Whitchurch: Postcode Conversion February 2022

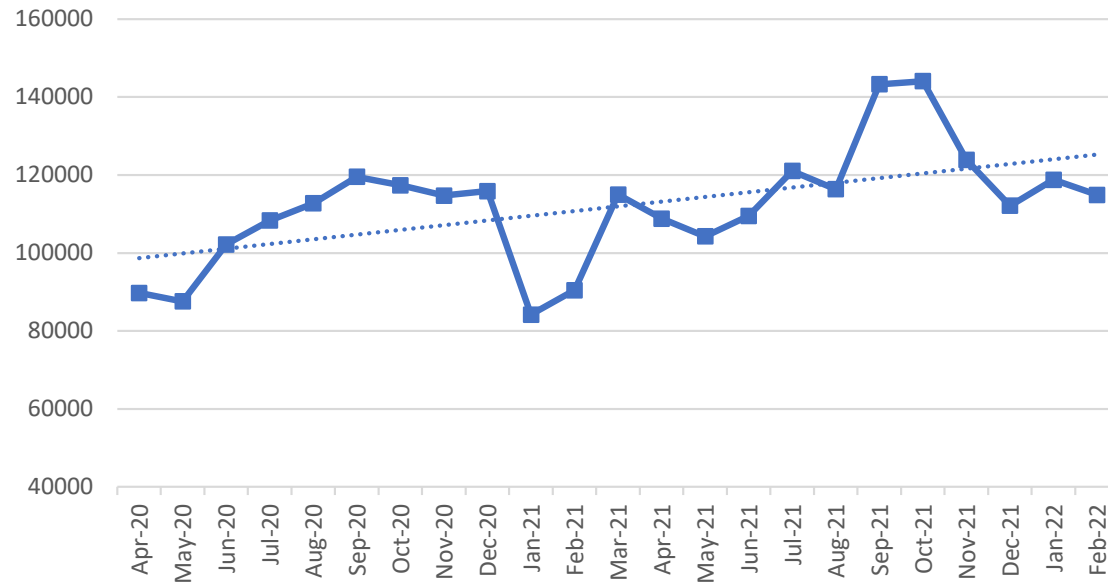


Source: Town & Place AI

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The following chart shows footfall in Whitchurch 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 114,908 in February 2022, which represents an increase of 27% over the same month in 2021.

Chart 4: Trends in Footfall



Whitchurch attracted 39,623 unique visitors in February 2022, each of whom visited an average of 2.9 times to generate footfall of just under 115,000. The average dwell time was 34 minutes.

## Alternative Shopping Destinations

Although more than two-thirds of Whitchurch residents (SY13) visited the town centre in February 2022, the town's population also utilises alternative shopping destinations further afield. The most frequently visited alternative destination is Shrewsbury, with 25.1% of SY13 residents visiting at least once in the month. This compares with 12.7% of SY13 residents who visited Nantwich, which is just over the border in Cheshire. The charts below show a steady increase in visits to Shrewsbury throughout 2021, although visits have tailed off somewhat at the start of 2022. Meanwhile, visits to Nantwich peaked in September 2021.

Chart 5: Shrewsbury

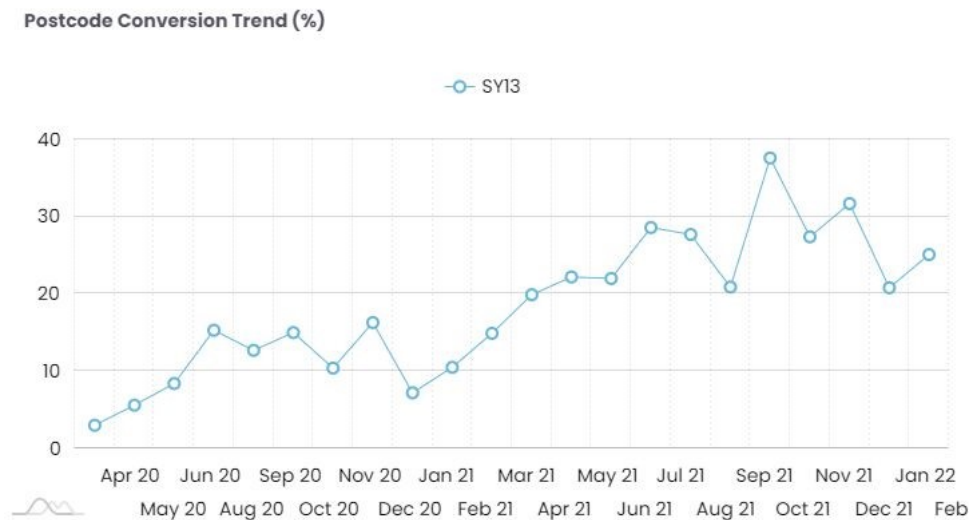
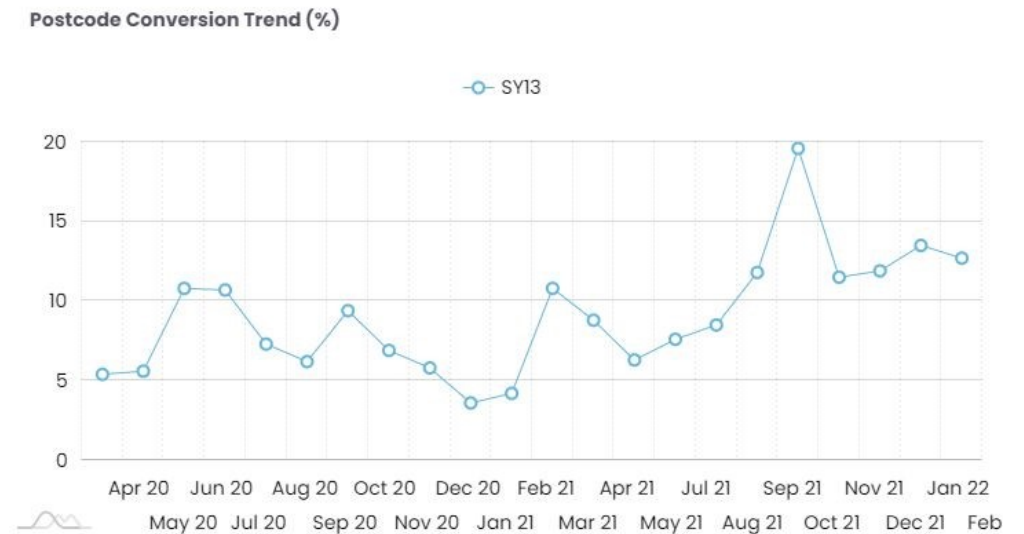


Chart 6: Nantwich



Market Drayton and Malpas are also popular destinations for Whitchurch residents, attracting 11.6% and 10.4% of the SY13 postcode district respectively in February 2022.

Chart 7: Market Drayton

Postcode Conversion Trend (%)



Chart 8: Malpas

Postcode Conversion Trend (%)

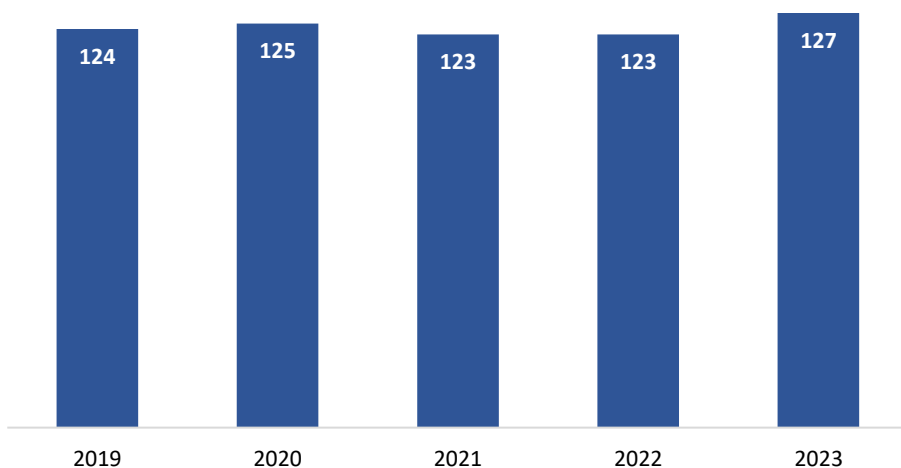


The postcode conversion charts have been downloaded from the Town and Place AI tool, which monitors visitor numbers and footfall across a range of town and city centres across the UK.

## Key Audit Results

There are a total of 127 commercial premises within the Whitchurch survey area. These are primarily in Green End (57 premises), High Street (62 premises) with a small number (8) in Watergate Street. Gross floor space allocated to these businesses is over 15,500m<sup>2</sup> (41% in Green End, 51% in High Street and 8% in Watergate Street). The average store size is 122m<sup>2</sup> with units ranging in size from 23m<sup>2</sup> to 904m<sup>2</sup>. Compared with the other tier 2 retail centres in Shropshire, the average store size is comparatively small, albeit larger than the average in Ludlow and on a par with Market Drayton. Whitchurch is notably smaller than Oswestry, Bridgnorth and Ludlow in terms of the number of stores trading, and is slightly smaller than Market Drayton. However, a number of key stores that serve the town are located outside of the main retail zone (as is also the case in Market Drayton).

Chart 9: Number of Commercial Premises in Whitchurch, 2019-2023



The number of commercial premises in Whitchurch has changed slightly since 2019. An additional premise was created in 2020 by splitting one premise into two. In 2021, two previously vacant premises in Watergate Street were converted into the Beacon Church, and as such are no longer classified as commercial. This reduced the commercial floor space in the town by almost 800m<sup>2</sup>. There were no further changes to either store numbers or floor space in 2022. In 2023, a formally vacant premises was divided into five new units within St Mary's Arcade. This resulted in a net increase of four commercial operators, although there was no expansion in floor space.

There are 42 comparison retailers in Whitchurch town centre, which cover a combined gross floor space of just under 4,900m<sup>2</sup>. This is the equivalent of 33% of units and 32% of space. This type of store accounts for the highest share of both units and floor space, and the amount of space dedicated to comparison retail is higher than any other towns in Shropshire except Ludlow and Church Stretton.

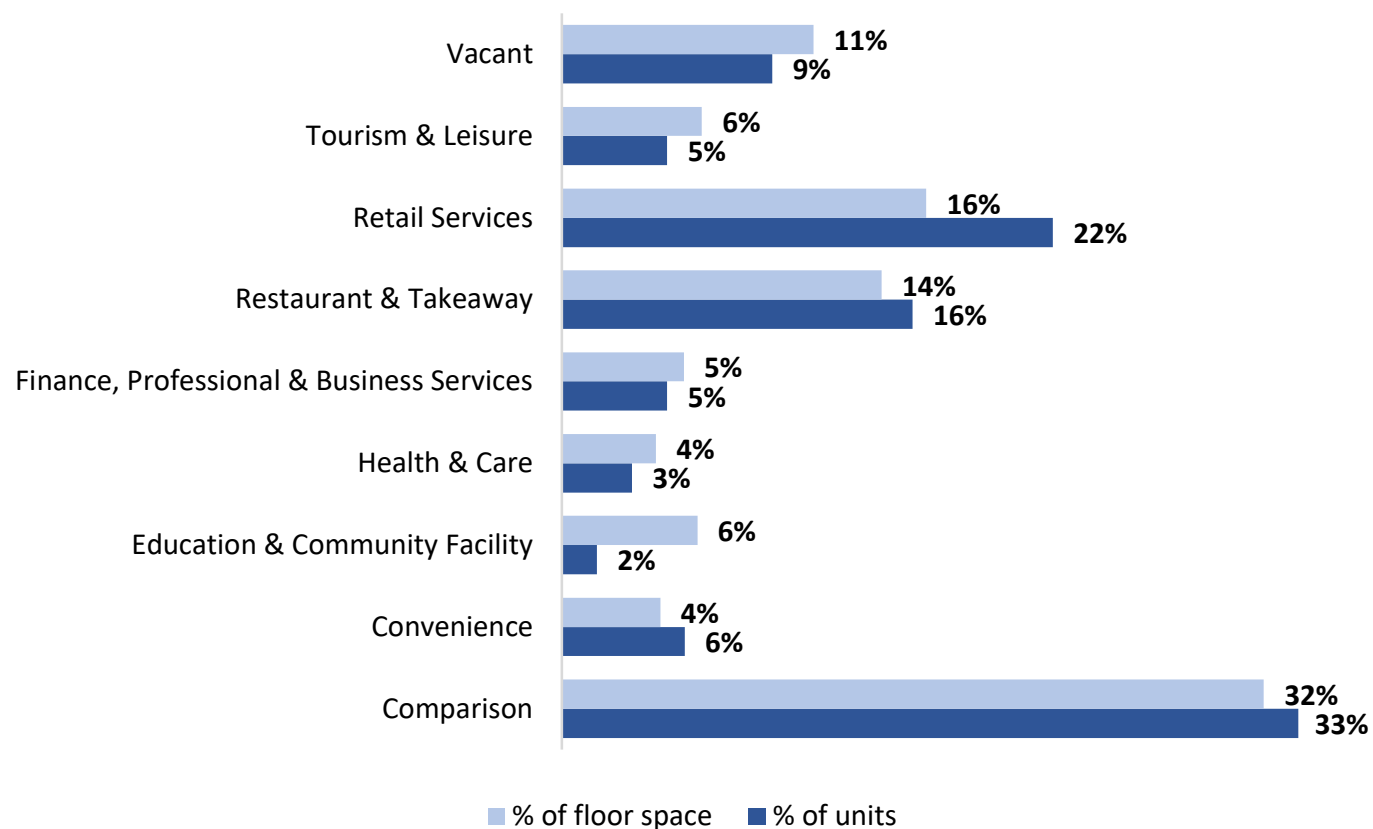


Retail service businesses are also well represented in Whitchurch, especially in unit terms, with 28 stores operating, which is more than a fifth of the total. These units tend to be smaller than average, and hence account for just 16% of gross floor space.

There are 20 restaurants and takeaways in Whitchurch town centre, which is the equivalent of 16% of units and 14% of floor space. 5% of units (and 5% of floor space) is attributable to financial institutions and professional and business services providers. A small proportion of outlets in Whitchurch are attributable to the convenience retail, education & community facilities, health care provision and tourism & leisure categories.

9% of units across the town centre are vacant, which is the equivalent of 11% of gross commercial floor space.

*Chart 10: Breakdown of Commercial Premises by Classification, 2023*



## Change since 2022

There has been little change in the composition of the Whitchurch town centre commercial sector between September 2022 and September 2023. The town has seen an decrease of two operators in finance and business services. The closure of a general store has meant that the convenience retail offer has reduced by one. In comparison, there are four more operators in comparison retail and two additional restaurants/takeaways and health care providers.

The number of vacant units has reduced by two.

Although the overall composition within the town remains largely unaltered, the level of churn—premises changing hands or use—has been on a par with overall churn across Shropshire across over the last four years.

Chart 12: Breakdown of Business Churn 2019—2023

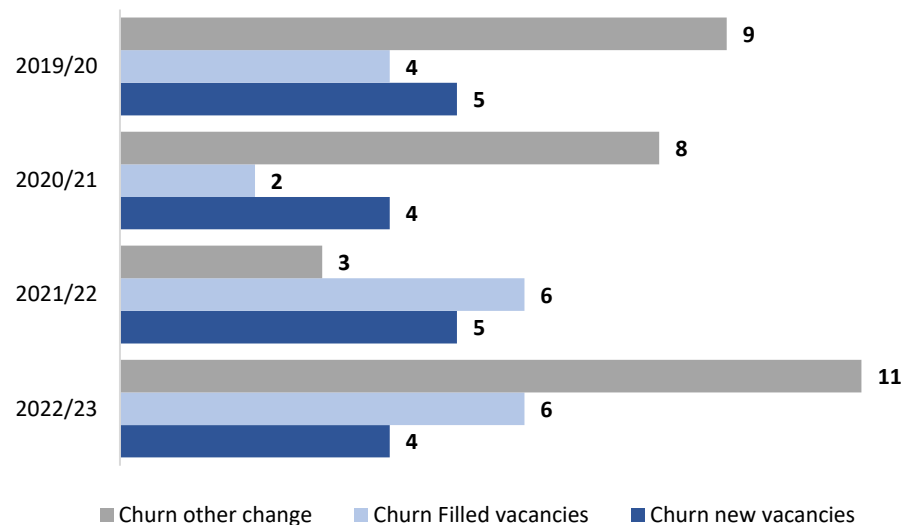
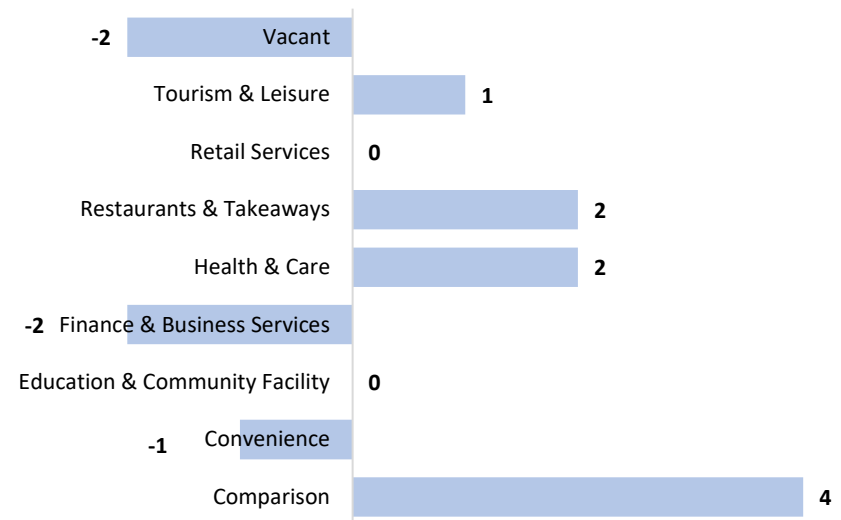


Chart 11: Change in Number of Units by Category, 2022/2023



In 2023, churn rose to 17%, compared with 11% in 2022 and 2021 and 15% in 2020. Higher churn in 2023 was in part due to the creation of five new commercial outlets along the High Street.

In 2023, 19% of churn was attributable to new vacancies, while 29% was caused by previously empty premises becoming filled. This compares with 36% and 43% in 2022, 29% and 14% in 2021 and with 28% and 22% in 2020.

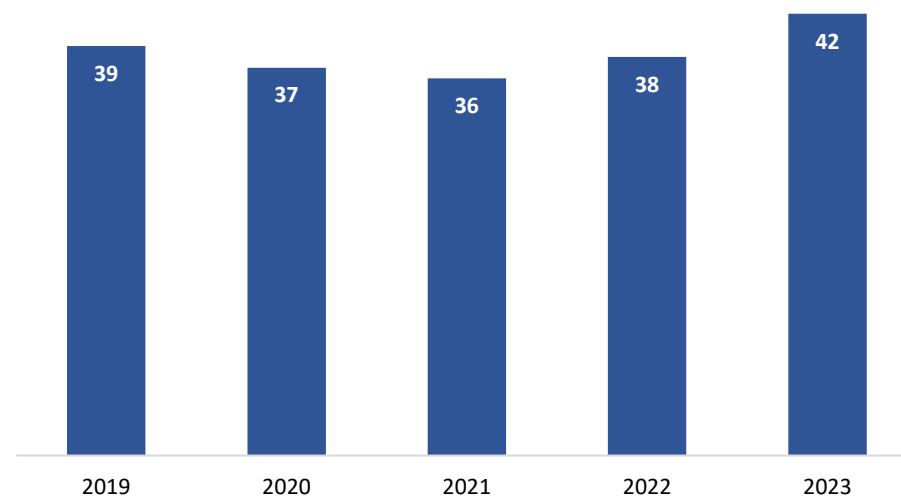
In 2020 and 2021, at least half of all churn was attributable to stores changing hands, use or branding. In 2022, this proportion fell to 21% before rising back up to over half of all change in 2023.

## Comparison Retail

The largest proportion of commercial units and space is dedicated to the comparison retail category, accounting for 33% of units and a marginally lower share of gross floor space (32%). This is the equivalent of 42 stores with an average size of 116m<sup>2</sup>. Comparison retail has a higher representation in Whitchurch than in any other town except Ludlow and Church Stretton.

The number of comparison stores in the town has fluctuated in recent years, falling slightly in 2020 and 2021. The sector has started to recover following the Covid-19 pandemic with two additional outlets operating in 2022 and a further four in 2023. Four of the five units trading in the new St Mary's Arcade on the High Street are comparison.

Chart 13: Number of Comparison Retailers, 2019-2023



Within the town there are seven clothes shops (all independents); three clothes shops have opened since the 2022 audit, and all are located within St Mary's Arcade. This has significantly bolstered the town's clothing offer following the closure of the M & Co chain clothing store between the 2019 and 2020 audits.

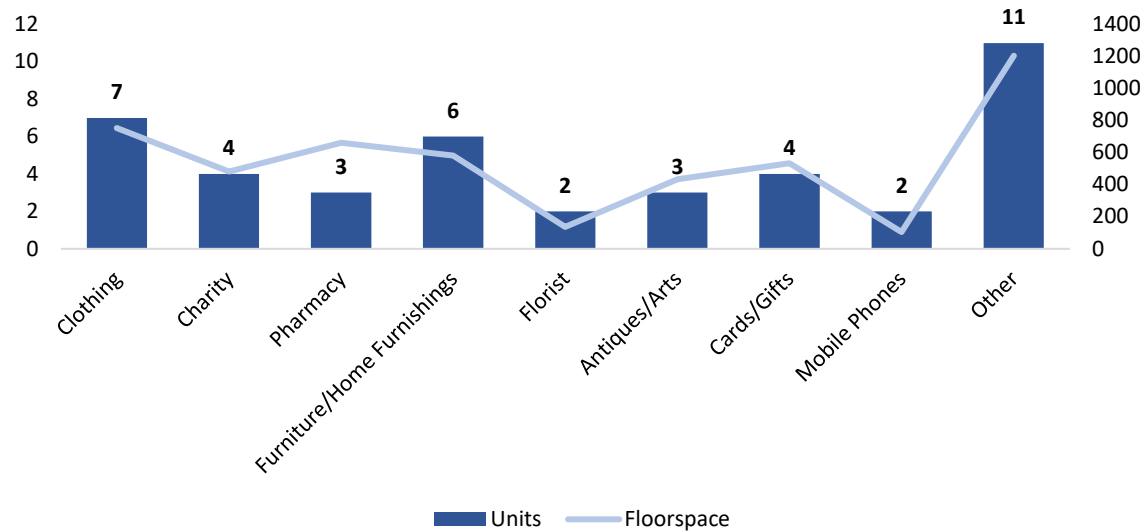
There are also six shops that can be grouped together as furniture/furnishings/home improvement outlets (one bathroom and one kitchen outfitter, a carpet store, an interiors store, a furnishings store and a specialist door retailer). There has been no change in this sub-sector since 2021.

Four charity shops operate in the town, which is no change since 2022 but a decrease of one since the 2021 audit (a Rotary pop-up shop opening between the 2020 and 2021 audit but closing before the audit in 2022).

There are two florists, two mobile phone stores, three pharmacies, three antiques stores/art shops as well four stores selling gifts and/or greetings cards. There was one each of the following store types: book store; crafts; electrical; picture framing; jewellery; vape store; toys; variety. In addition, the two new stores which opened in 2022—a pram and nursery accessory store and a renewable energy equipment store were still trading in 2023.

Although most traders are independent, Whitchurch hosts the following multiples: WH Smith; Boots; Rowlands; Card Factory

Chart 14: Breakdown of Comparison Retail by Type, 2023



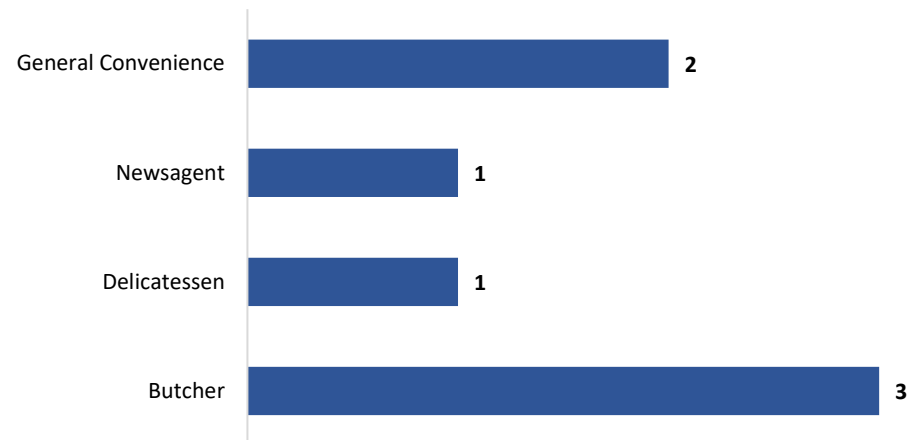
## Convenience Retail

There are seven convenience stores within the main shopping area of Whitchurch. These account for 6% of all units and for 4% of gross floor space. As well as three butchers (one of which opened in 2022), there is a delicatessen, a newsagent and two general convenience stores. One general convenience retailer closed in 2023.

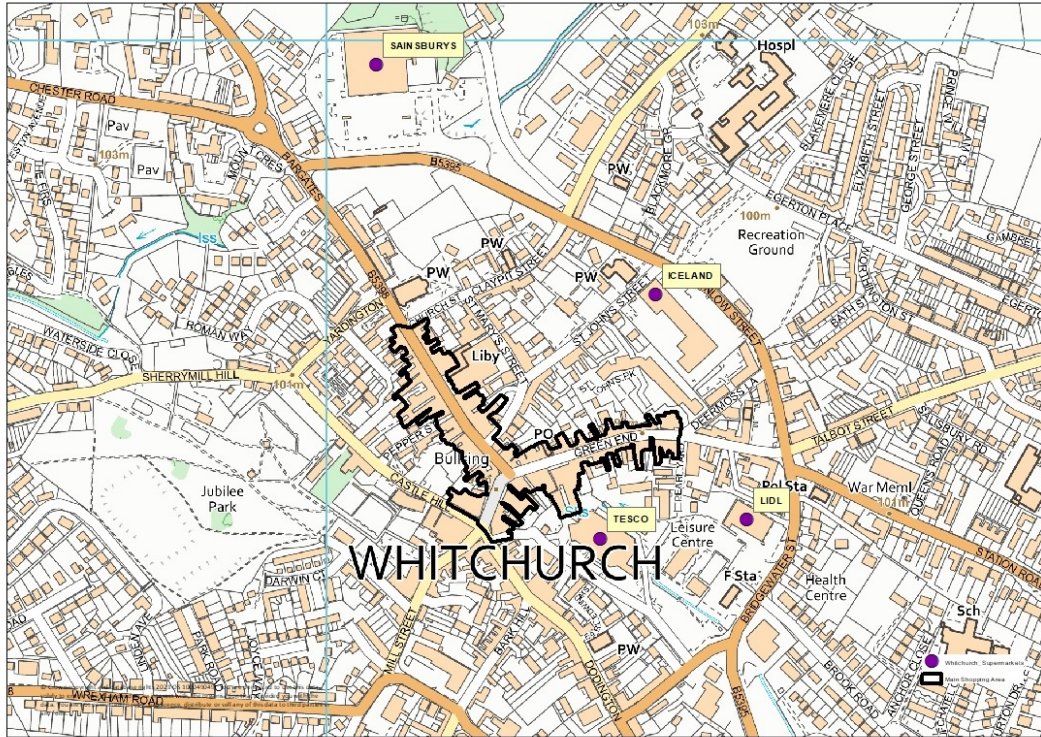
There is no specialist greengrocer in the town centre.

There are two cafés in Whitchurch which also operate as bakeries (classified as cafés for the purposes of analysis) and the delicatessen also has a small café area.

Chart 15: Breakdown of Convenience Retail by Type, 2023



Map 7: Location of Whitchurch's Main Convenience Stores



Convenience retail accounts for a relatively low proportion of the retail offer in Whitchurch. It should be noted that the town's main supermarkets – Sainsbury, Tesco, Lidl and Iceland – are all located a short distance from the main town centre shopping streets, as shown on the adjacent map.

This means that compared with other towns, a relatively small proportion of units and floor space is allocated to the convenience sector.

## Restaurants & Takeaways

16% of units in Whitchurch are attributable to restaurants and takeaways, with this category accounting for a slightly lower proportion of gross floor space (14%).

The number of operators in the restaurant and takeaway sector has risen by three since 2019, with one additional operator opening in 2020 and two in 2023. The new additions in 2023 were a restaurant and a takeaway pizza outlet.

Chart 17: Breakdown of Restaurant/Takeaway Units by Type, 2023

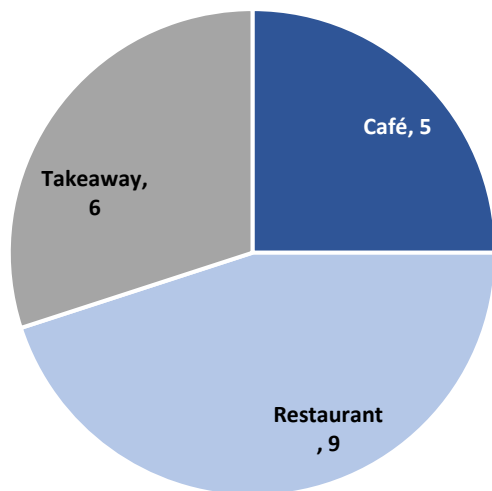
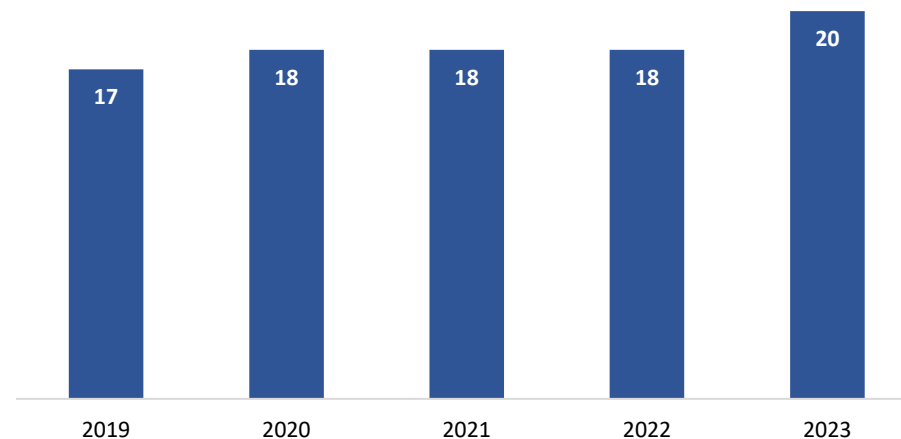


Chart 16: Number of Restaurants & Takeaways, 2019-2023



The 20 units are split between cafés (25%), restaurants (45%) and takeaways (30%). Takeaways account for a lower share of floor space (23%) while restaurants have a disproportionately high share of floor space (47%). Two of the cafés double up as a bakery. The range of cuisines on offer by Whitchurch restaurants includes Thai, Chinese, Indian, Italian and modern British. In terms of takeaways, there is a fish and chip shop, a Chinese takeaway and pizza.

## Tourism & Leisure

Also within the hospitality sector, there are four public houses, which is one more than in 2022, taking the number back up to the level recorded in 2021. These take up approximately 760m<sup>2</sup> gross floor space, the equivalent of 78% of all floor space attributable to tourism & leisure facilities in the town. There is a lack of guest accommodation (B&Bs or hotel bed spaces) within the town centre, although there is one hotel (or public house with rooms). Guest accommodation outside the main shopping area of the town include the Hill Valley Hotel, to the north of Whitchurch, Dodington Lodge, just south of the main shopping streets and Willington Lodge, a luxury wedding venue.

There is also a pottery activity centre within the main retail zone of the town.

## Finance & Business Services

There are six commercial operators in the finance and business services area in Whitchurch town centre, accounting for just over 800m<sup>2</sup> of gross floor space.

The number has halved since 2020; losses include the closure of Barclays Bank and the Halifax. The classification is under-represented in Whitchurch, with proportionally fewer operators than any other town except Highley.

Chart 19: Number of Financial & Business Services Providers by Type, 2023

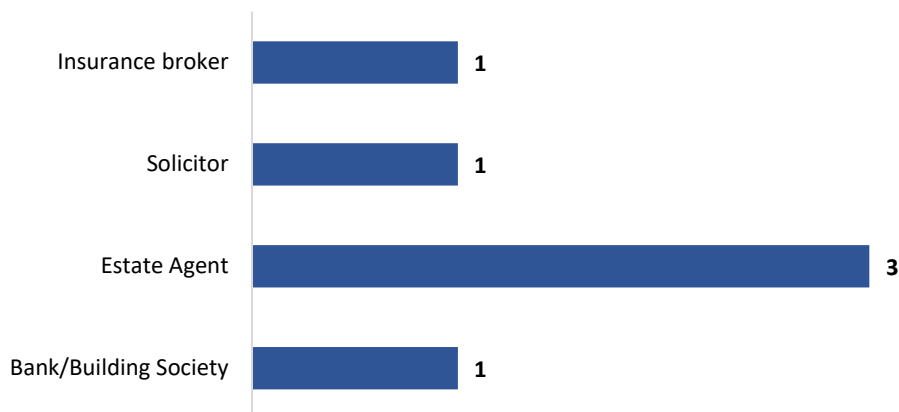
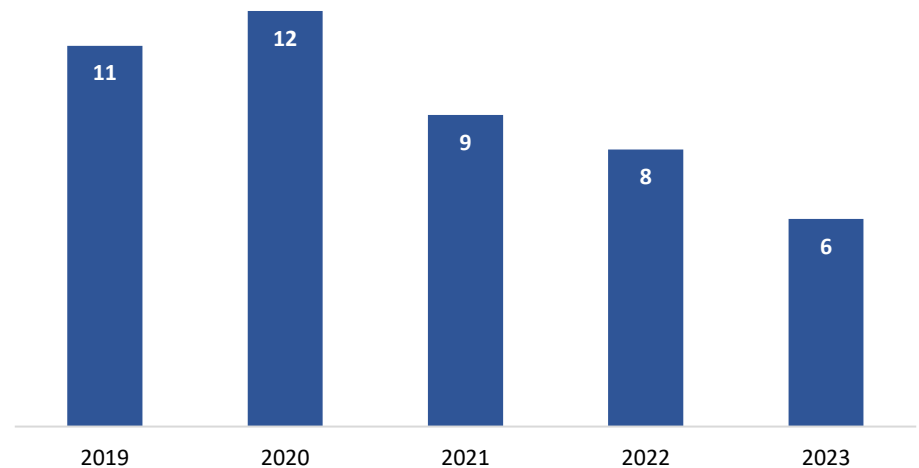


Chart 18: Number of Financial & Business Services Providers, 2019-2023



With the closure of the Halifax in 2023, Whitchurch is now served by just one Bank (Lloyds TSB); There are three estate agents (Halls, Barbers and AJ Reid).

Also included within this category are a solicitor and an insurance broker.

## Retail Services

There are 28 retail service businesses operating in Whitchurch town centre, with these accounting for over 2,500m<sup>2</sup> of gross floor space. This is the equivalent of 22% of all units in the town and 16% of floor space.

The number of operators in this sector rose by one a year between 2019 and 2022, but there was no further change in 2023. This takes the combined rise over the years to three units, or +12%.

Chart 21: Breakdown of Retail Services by Type, 2023

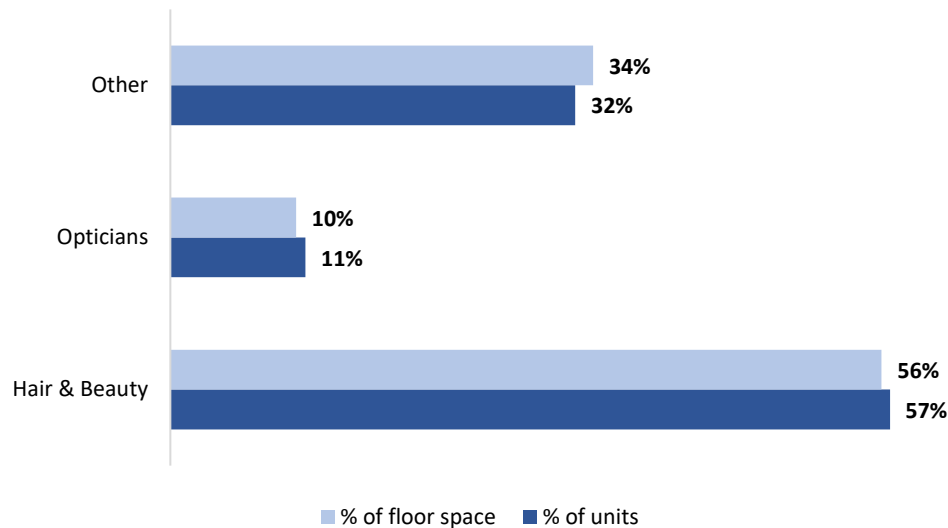
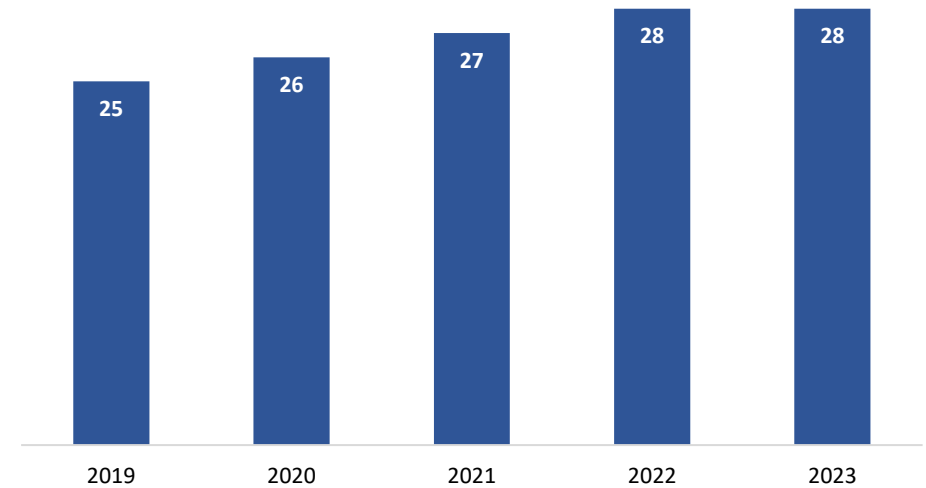


Chart 20: Number of Retail Services Providers, 2019-2023



Although the range of services provided is wide, a very high number of operators are in the barber and hair salon classification, with these together representing 57% of units and 56% of floor space. In addition, there are three opticians in the town. Amongst other services provided in the town (by one operator only) are computer repairs, dog grooming, bookmaker, funeral director, post office, photographer, shoe repairs, travel agent and tattoo artist.

## Health & Care

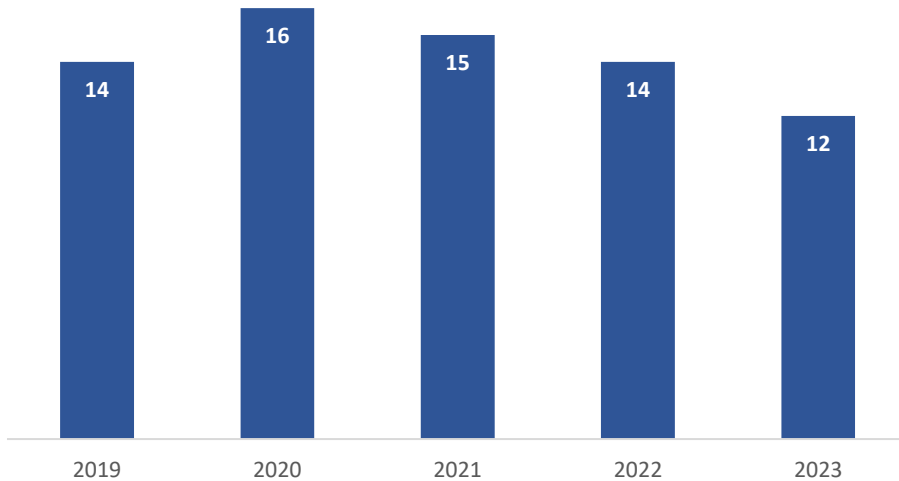
There are two dental practices operating within the main Whitchurch shopping area as well as two home care agencies.



## Vacant Units

9% of Whitchurch town centre outlets are vacant (11% of gross floor space). This is amongst the lowest in Shropshire and compares favourably with the average for the county (11%). It is also notably lower than the national average, which stood at 13.9% in the second quarter of 2023 according to BRC (based on high street data only).

Chart 22: Number of Vacant Premises, 2019-2023



The number of unoccupied premises in Whitchurch peaked at 16 in 2020 but has declined in each subsequent year. It should be noted that two premises which were classed as vacant in 2019 and 2020 are now longer classified as commercial properties and consequently, these aren't included in the 2021, 2022 or 2023 figures.

There are eight vacant units on Green End and four on the High Street (including the former National Westminster and HSBC banks). The size of vacant units ranges from 61m<sup>2</sup> to 257m<sup>2</sup>.

A third of all vacant premises in Whitchurch in 2023 have been empty for less than a year. A quarter have been vacant since 2020, when the vacancy rate was at its highest, and two stores have been empty since at least 2019.

Map 8: Location of Vacant Commercial Premises, 2023



The number of vacant commercial premises in Whitchurch reduced by two to 12 in 2023. Eight of the premises which had been vacant in 2022 were still empty in 2023, and there were four new vacancies. Six premises which were vacant in 2022 had been filled in 2023.

Map 9: Change in Number & Location of Vacant Commercial Premises, 2022-2023



## Residential Premises

Although the town centre contains concentrations of commercial enterprises, there is also a significant amount of residential property within the main shopping centre. In total, 146 residential premises are located in the audit area, of which the vast majority are flats (131 or 90%) which are largely located above retail or other commercial outlets. There is a cluster of terraced housing at the eastern end of Green End. Flats are primarily located on the High Street, but there are also some residences above commercial units on Green End. The number of flats in Whitchurch town centre increased by 10 between 2020 and 2021 with an additional flat coming on board in both 2022 and 2023.

Map 10: Location of Residential Premises in Whitchurch Town Centre

Chart 21: Breakdown of Residential Properties by Type

