Shropshire Town Centres Study

Main Report

On behalf of **Shropshire Council**

Project Ref: 48609/4501 | Date: September 2020

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For and on behalf of Stantec UK Limited				

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1 Introduction

1.1.1 Stantec was instructed by Shropshire Council ('the Council') in March 2020 to undertake a Shropshire-wide town centres study ('TCS').

1.1.2 There has been no Shropshire-wide town centres study undertaken since the amalgamation of a number of Councils in 2009. The last retail evidence base documents produced were as follows: Bridgnorth Retail Study (2006); South Shropshire Retail and Leisure Study (2007); North Shropshire Town Centre Health Check and Retail Assessment (2008); Oswestry Retail Study Update (2008); and Shrewsbury Retail Policy Advice (2014). No updates have been carried out in the intervening period. Since the last studies were published, national policy for retail and town centres has been amended following the publication of the National Planning Policy Framework ('the NPPF') in March 2012, and subsequent updates to the NPPF.

1.1.3 The Shropshire TCS has been commissioned as a key evidence base document to inform the current review of Shropshire's Local Plan (hereafter referred to as 'the Local Plan'). The report provides an assessment of town centre health in order to inform new retail and town centre policies for Shropshire. The study's specific terms of reference are set out below:

- an assessment of the current health of Shropshire's defined Strategic and Principal Centres, namely Shrewsbury, Bridgnorth, Ludlow, Market Drayton, Oswestry and Whitchurch;
- an assessment of national and regional retail and leisure trends and an assessment of qualitative needs;
- advice on whether there remains suitable justification for defining the various boundaries within town centres;
- recommendations on the extent of boundaries within town centres;
- policy recommendations for Shropshire's network of centres;
- Shrewsbury-specific policy recommendations; and
- advice on a suitable locally-set impact threshold.

1.1.4 Responding to these terms of reference, the report is structured as follows:

- **Section 2** describes key trends in the retail and leisure sector;
- **Section 3** sets out our advice in relation to Shropshire's retail hierarchy;
- **Section 4** provides our assessment of the health of Shropshire's Strategic and Principal Centres;
- **Section 5** sets out our assessment of qualitative needs within Shropshire's Strategic and Principal Centres;
- **Section 6** describes our reasons for justifying town centre boundaries and primary shopping areas;
- **Section 7** provides our town centre and retail policy recommendations; and
- **Section 8** contains a summary of our findings and recommendations.

2 Retail and Leisure Trends

2.1 Market Trends

Introduction

2.1.1 There has been ongoing restructuring in the retail and commercial leisure market since the global financial crisis in 2009. Online sales have continued to rise, most retailers are building less retail floorspace, operators have found that less existing floorspace is required and existing floorspace is being converted into alternative uses. The COVID-19 global pandemic has and will accelerate these trends. High streets in the UK were forced to close in March 2020 and when they re-open, there will be many retailers will not return, or will rationalise their store portfolio.

2.1.2 The need to maintain social distancing, at least in the short-term, means that custom will be reduced. Returning to pre-COVID-19 levels of vitality and viability will therefore be enormously challenging for town centres. Below, we grapple with the key trends of the last few years; we set out the main economic recovery scenarios; and we predict the likely implications of the COVID-19 pandemic.

Brexit

2.1.3 In 2019, the UK economy grew at its lowest rate in seven years, which was largely attributed to the uncertainty surrounding Brexit negotiations and a weaker global economy. The small growth in the UK economy was reflected in consumer spending which only increased by 1.2 per cent, the smallest increase in eight years[1]. Low consumer confidence and lacklustre income growth was blamed for the disappointing growth in consumer spending.

Retail Sales

2.1.4 The volume of retail sales only grew by three per cent in 2019, which was the lowest growth in retail sales since 2014. There was a marked slowdown in growth over the course of the year and this trend was particularly visible within the non-food retail sales market. Non-food retail sales saw growth of approximately four per cent at the beginning of the year but ended up in decline in year-on-year sales, by the end of the year. The non-food retail sector had not experienced a decline in sales volume since early 2012.

Store Closures

2.1.5 Table 3.1 below shows the net changes in the UK's stock of retail units per year from 2012 to 2019. The net loss of retail units has been increasing each year since 2014, and by 2019 there was an annual net loss of 9,169 retail units across the UK[2]. Whilst 2019 was the first year since 2013 when the number of store openings was greater than the previous year, that was outweighed by the much larger increase in store closures. The 54,052 store closures in 2019 is some 13.4 per cent higher the corresponding number in 2012, and the net change in the UK's stock of retail units over that seven-year period was minus 27,006.

[1] Experian, Retail Planner Briefing Note 17, February 2020

[2] Local Data Company, GB Retail and Leisure Market Analysis Full Year 2019

Table 3.1 Net change in UK retail units by year 2012-2019

Year	Store Openings	Store Closures	Net Change in UK Retail Units
2012	43,392	47,678	-4,286
2013	49,496	47,456	2,040
2014	47,514	47,624	-110
2015	47,042	47,830	-788
2016	45,986	47,636	-1,650
2017	45,274	50,767	-5,493
2018	43,278	50,828	-7,550
2019	44,883	54,052	-9,169
2012-2019	**366,865**	**393,871**	**-27,006**

2.1.6 All retail location types – town centres, retail parks and shopping centres – have experienced a rising vacancy rate and an increase in the net loss of retail units. However, the average vacancy rate at retail parks (8.1 per cent) is significantly lower than the vacancy rate at high streets and shopping centres (12.1 per cent and 14.4 per cent, respectively).

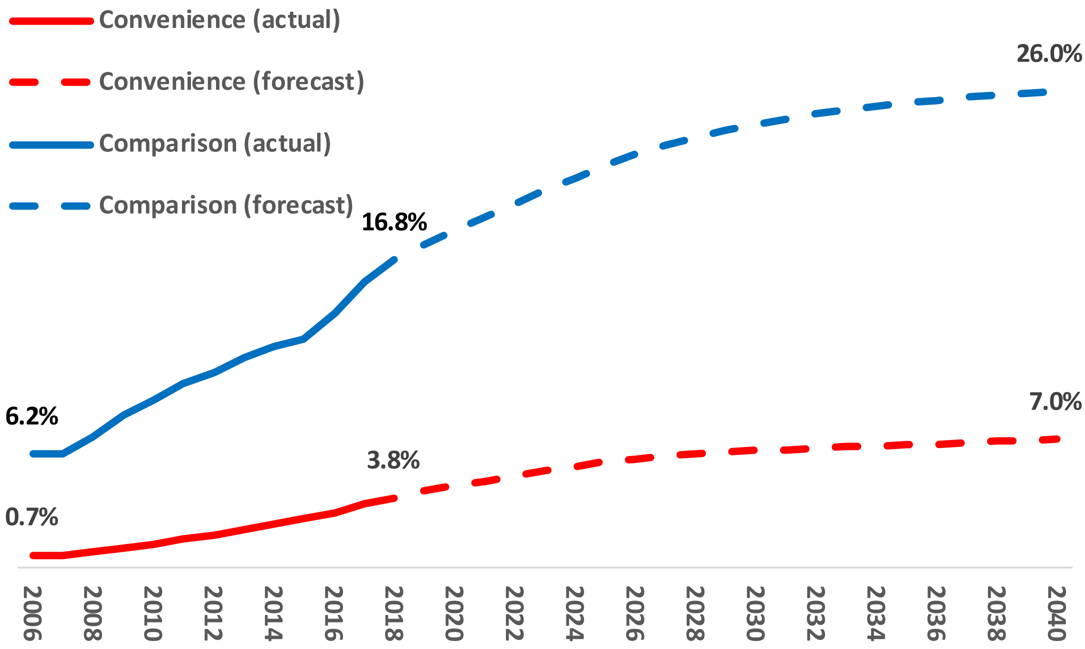
Online Shopping/Special Forms of Trading

2.1.7 Figure 3.1 shows the market share of special forms of trading (including online shopping) in both the convenience and comparison retail sectors up to 2018 and projected forward to 2040. Experian defines Special Forms of Trading ('SFT') as any non-store retailing including internet sales, mail order sales, market stalls, vending machines and door-to-door selling. Internet sales account for a large proportion of SFT.

2.1.8 Unsurprisingly, Figure 3.1 identifies that the market share of SFT in both the comparison and convenience retail sectors is forecast to increase significantly. However, the rate at which it is increasing within the comparison goods sector is much higher than in the convenience retail sector. This is because foodstore operators find it difficult to make online shopping profitable. Experian predicts that by 2040, SFT will account for over a quarter of the comparison goods retail market, the obvious implication being that less comparison retail floorspace will be required.

2.1.9 It is worth noting that the forecasts shown in Figure 3.1 were made prior to COVID-19, which is likely to have triggered a significant growth in internet retail sales while people have been unable to visit traditional shops.

Figure 3.1 Actual and projected market share of non-store retail sales/Special Forms of Trading (Adjusted for SFT Sales from Stores)



Source: Figure 5, Appendix 3, Experian Retail Planner Briefing Note 17 (February 2020)

2.1.10 Generally speaking, the performance of the high street retail sector has been weakening, and that was the case before the COVID-19 'lockdown' was imposed. Where necessary, some consideration should be given to condensing and concentrating the retail offering in Shropshire's town centres. Consideration should also be given to introducing and expanding alternative uses, including small- to medium-scale residential and office uses, in appropriate parts of each town centre.

Retail Rents

2.1.11 In 2019, average prime retail rents for new deals has fallen by 7 per cent. The reduction in prime retail rents achieved differs across regions with Central London experiencing a decrease of just over 5 per cent and Wales experiencing a decrease of just under 13 per cent. This is the largest reduction in average achieved prime retail rents since 2008/2009, when UK-wide prime retail rents fell by 11 per cent[3].

2.1.12 Only 6.1 per cent of prime retail floorspace is vacant whereas 15.1 per cent of secondary floorspace is vacant, as one would expect. A more worrying trend is that approximately a third of all vacant floorspace has been vacant for over two years.

2.2 Convenience Retail Sector

2.2.1 Prior to the 2009 global financial crisis several years' ago, the convenience goods retail sector was a key driver of growth in the retail sector. The 'big four' foodstore operators (Asda, Morrisons, Tesco and Sainsbury's), which have traditionally dominated the market, were building and operating increasingly larger stores and expanding the range of services that they provide (particularly in terms of comparison retail goods). Whilst many of these larger stores were built outside of town centres, new large foodstores also often served to anchor re-development schemes within smaller town centres.

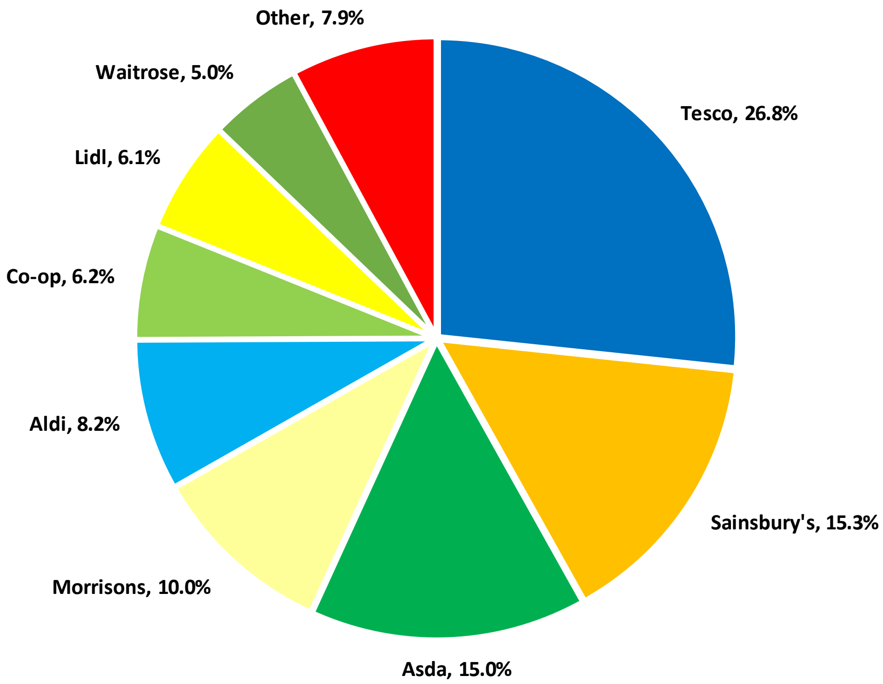
2.2.2 However, since the global financial crisis, the market dominance of the 'big four' has been increasingly challenged, both by higher-end operators, such as Waitrose and Marks & Spencer (Simply Food and Foodhall formats), and value/discount retailers, primarily Aldi and

[3] Colliers International, Midsummer Retail Report 2019

Lidl. In particular, the value retailers have posted significant year-on-year growth over recent years and they have emerged as important forces in the convenience goods retail sector. Expenditure on convenience retail goods had been falling in recent years due to increasing competition between operators (leading to a reduction in prices and low inflation).

2.2.3 Figure 3.2 below shows that whilst the ‘big four’ operators still account for two-thirds of the convenience retail market, their dominance is being challenged by Aldi, Co-op and Lidl in particular.

Figure 3.2 UK Grocery Market Share (22 March 2020)



Source: KANTAR

2.2.4 There has been an increasing move by the major convenience goods operators away from opening larger-format stores towards smaller supermarkets and establishing a network of ‘top up’ convenience goods shopping facilities. These smaller-format stores are often located in town centres, or district/neighbourhood shopping parades. The shift has been driven by changing consumer behaviour; shoppers are undertaking an increasing number of smaller ‘top-up shopping’ or ‘basket shopping’ trips instead of a weekly food shop to a large out of centre foodstore. Such proposals are not always successful, though. For instance, Waitrose recently opened two convenience stores in prime locations within Manchester City Centre, which have both now closed.

2.2.5 One of the reasons which explains why retailers such as Aldi and Lidl have increased their market share over recent years is because they have successfully diversified their offers to include more premium products, thereby appealing to new categories of customer. Those retailers are no longer really ‘discount operators’ in the way they were previously, and they have effectively become mainstream foodstore operators.

2.2.6 Both Sainsbury’s and Tesco now have more convenience stores than large supermarkets and superstores and, along with Morrisons, these operators have withdrawn proposals for the development of new superstores and they have also pulled out from town centre redevelopment projects in recent years. In the last 2-3 years, both Tesco and Morrisons have closed dozens of ‘unprofitable’ foodstores (with Morrisons also disposing of its portfolio of convenience stores to concentrate on its core business, demonstrating the complexity of changes within the market).

2.2.7 By way of comparison, Aldi and Lidl have investment plans to open more than 110 stores each on an annual basis. Store formats are also evolving with new Aldi and Lidl foodstores now providing more floorspace than previous formats, and new facilities such as in-store bakeries have been introduced quite recently. In contrast, the likes of Tesco and Sainsbury's are incorporating concessions into their portfolio of superstores. Tesco has a deal with the Arcadia group to introduce names such as Burton and Dorothy Perkins into some of its stores, whilst Sainsbury's takeover of Argos has introduced Argos concessions into many of its larger stores.

2.3 Comparison Retail Sector

2.3.1 Over the last five years or so there has been a succession of high-profile failures and company restructurings within the comparison goods retail sector, including: Toys R Us, Maplin, Debenhams, House of Fraser, Dixons Carphone Warehouse, BHS, Beales and Laura Ashley. Furthermore, the impacts of COVID-19 have led to some major operators announcing that not all of its existing stores will re-open, once the pandemic is under control.

2.3.2 Whilst the circumstances impacting each of the retailers are specific to them, there are a couple of common themes which have led to companies failing or needing to restructure. These include:

- **Relevance** – the format of certain retailers is becoming less relevant, a good example of this being Toys R Us. Due to the size of the stores Toys R Us found itself competing against larger retailers such as foodstores and the likes of Argos. As Toys R Us was a specialist retailer, it was unable to change the type of goods being sold within its floorspace (like supermarkets and catalogue retailers can) and so Toys R Us could not react to the market change as freely. Toys R Us also had to compete against large online retailers, such as Amazon, which can offer goods at cheaper prices due to lower overheads.
- **Over-expansion** – some retailers over-expanded in the early 2000s and have not been able to respond to the growth in online retailing and decline in high street retailing. A good example of this is Maplin, which experienced rapid growth but found that its specialist product was better suited to an online audience.

2.3.3 Identifying the success of online retailing as the main reason for the decline in high street retailing may be premature. Whilst it is a common view that the prevalence of online retailing will increase, it would be naïve to dismiss the role of the high street and multi-channel retailing because of the 'try-it-on' and 'feel it' factor. The most successful online brands are often built from their reputation on the high street, a good for example John Lewis.

2.4 Commercial Leisure

2.4.1 The restaurant sector has been feeling the effects of the 'casual dining crunch' in recent years. The number of insolvencies in the year up to June 2019 was up 25 per cent to 1,412, compared to the equivalent data for 2018. This was the highest number of insolvencies in the restaurant industry since 2014.

2.4.2 The reduction in consumer spending and rising costs due to the devaluation of the pound and the uncertainty of Brexit negotiations is blamed for the increase in insolvencies. There was also a rapid growth of the casual dining sector following the global financial crisis which has led to an over saturation of the market. We envisage further restaurant closures, particularly amongst large chains.

2.4.3 Many consider spending on leisure to be discretionary and therefore it is likely to be in line with the performance of the UK economy. Table 3.2 shows average weekly household spending on leisure over the last 10 years. It is worth noting that the 2009 data coincided with the start of the global financial crisis, 2014 was prior to the Brexit vote and data from 2019 are the latest available figures, prior to the impact of COVID-19 when many of these leisure activities have been shut down.

Table 3.2 Average Weekly Household Spending Data 2009-2019

Spending Category	2009 (£)	2014 (£)	2019 (£)	Percentage change (2009-2019)
Cinema, theatre and museums etc.	2.30	2.80	3.40	47.8
Admissions to clubs, dances, disco and bingo	0.50	0.50	0.90	80
Restaurant and café meals	13.30	16.60	19.40	45.9
Takeaway meals and other snack food	8.00	8.80	11.00	37.5
Gambling payments	4.10	2.90	2.60	-36.6
Sports admission, subscriptions, leisure class fees and equipment hire	5.00	6.90	7.50	50

Source: ONS, Family Workbook Spending, March 2020

2.4.4 The average weekly household spend has increased across all of the sub-categories with the exception of gambling payments. There has been a significant growth in spending on sports admission subscriptions and leisure class fees, which has been largely led by a doubling of spending on subscriptions to sports and social clubs, reflecting the growth in the discount gym market.

2.4.5 There has also been a significant increase (45.9 per cent) in spending on restaurant and café meals since the start of the global financial crisis several years ago. The decrease in gambling payments (-36.6 per cent) is largely led by a significant fall in spending at bookmakers.

2.5 Potential Impacts of COVID-19

2.5.1 'Non-essential' retailers are able to re-open from 15 June 2020, subject to compliance with various criteria. On 24 May 2020, the High Streets Minister Simon Clarke announced the creation of a £50 million fund for councils to support their local high streets to re-open safely. The fund is to be used to support a range of practical safety measures including new signs, street markings and temporary barriers. The fund can also be used to develop local marketing campaigns to explain the changes and reassure the public that the high streets are safe.

2.5.2 The initial impacts of the global pandemic on retail and the forced closure of non-essential retail are stark, with the British Retail Consortium ('BRC') predicting that the current lockdown is costing non-essential retailers £1.8bn a week in lost sales. The BRC has also observed subdued discretionary spending in countries which have lifted lockdown measures following a short initial increase in spending.

2.5.3 Concerns about the future of retail following the global pandemic have also been expressed by Andrew Goodacre, Chief Executive of The British Independent Retailer's Association. Mr Goodacre has said people may become weary of queuing and that social distancing takes away the fun and positive experience of shopping, and he predicts that this may affect retail sales for many months.

2.5.4 The short-term impacts of the global pandemic are already being felt with a number of national multiple retailers restructuring or entering administration, including Clarks, Debenhams, Oasis, Warehouse, Cath Kidston and Brighthouse.

2.5.5 The long-term impacts of the global pandemic on consumer spending and behaviour is far more difficult to predict. However, some patterns are beginning to emerge which may impact the future of retail and leisure in the UK. Understandably there has been a significant increase in online retailing, especially in the convenience goods sector. Tesco alone has doubled its online capacity to one million orders a week. It is predicted that the online grocery market will increase by around one quarter. The amount being spent by over-65s on food deliveries doubled in April 2020.

2.5.6 Interestingly, Marks & Spencer has announced that 365,000 existing customers have used the company's website for the first time and a further 315,000 have either tried it out or returned as shoppers. Steve Rowe, Chief Executive of Marks & Spencer, considers that the global pandemic will speed up the switch from the high street to the internet and trigger big shifts in how people shop, dress and eat. Marks & Spencer has experienced a significant decrease in sales of formalwear and a significant increase in casualwear, which reflects the shift to working from home.

2.5.7 Another trend we are seeing emerge during the pandemic is the return of the 'big shop' in the convenience goods sector. The average spend per trip in supermarkets and superstores has increased by £7 to £26.02. This change may only be temporary during the 'lockdown' as people look to minimise the number of trips outside of their homes.

2.5.8 There is concern that the global pandemic may increase the rate at which pubs and restaurants are closing across the UK, with some estimating that up to 30,000 will remain permanently closed following lockdown. The British Beer and Pub Association has said the two-metre social distancing rule means that only one in five pubs will be able to re-open under these restrictions.

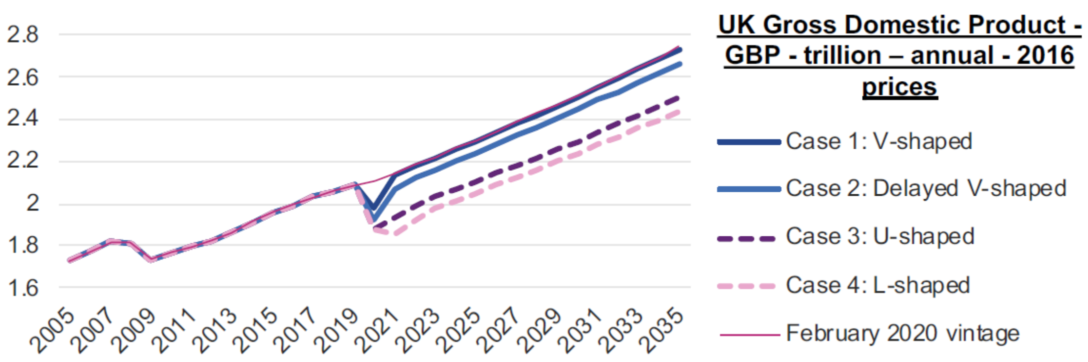
2.6 Potential Economic Scenarios

2.6.1 Experian has outlined four potential scenarios for the UK macro-economic performance following the global pandemic, namely: V-shaped; Delayed V-shaped; U-shaped; and L-shaped recoveries. Experian identifies both V-shaped scenarios as being most likely based on the response from the UK and other governments worldwide.

2.6.2 In both 'V-shaped' scenarios, Experian predicts that the outbreak will be contained relatively swiftly, which will allow Gross Domestic Product ('GDP') to rebound strongly in a 'V-Shape' following a sharp decline in Q2 of 2020. In the 'U-shaped' scenario the virus is contained in the same timeframe; however, the economic impacts are more severe due to a tightening of credit and further declines in Sterling. The 'L-shaped' scenario is similar to the 'U-shaped'; however, the economic impacts are even deeper than under the 'U-shaped' scenario and the economy enters an extended period of stagnation/subdued growth.

2.6.3 Figure 3.3 below shows that under both V-shaped scenarios, the UK's GDP will either return to the levels forecast prior to the coronavirus pandemic or get close to that level. However, under both the U-shaped and L-shaped scenarios, the UK's GDP will lag significantly behind previous forecasts.

Figure 3.3 Forecasted UK Gross Domestic Product Post COVID-19



Source: Experian, COVID-19 Economic Scenarios Macro Report 2020

2.6.4 The significance of UK's GDP lagging behind previous forecasts is that investment will be stifled, which will impact retail businesses' ability to obtain credit and consumer spending may be further supressed as a consequence.

2.6.5 It is important to state that these are only initial forecasts of the possible impact of the global pandemic and it will be important to continue monitoring the UK's economic performance to gain a good understanding of how town centres across the UK are affected.

3 Retail Hierarchy

3.1 Centres in Shropshire and the Surrounding Area

Venuescore

3.1.1 The Javelin Group's Venuescore ranks over 3,500 retail destinations across the UK including town centres, malls, retail warehouse parks and factory outlet centres (individual 'out-of-centre' stores are not included). Each destination is given a weighted score based on the number of multiple retailers present, including anchor stores, fashion operators and non-fashion multiples. The score assigned to each retailer is weighted depending on their overall impact on shopping patterns; for example, a department store will achieve a high score.

3.1.2 The Javelin information is widely used in the retail industry to assess the relative strength of shopping destinations. The results for centres in Shropshire and other relevant centres outside of but close to Shropshire are shown in Table 3.1.

Table 3.1 Venuescore UK Shopping Index and UK Rank

Shopping Destination*	Location Grade	Venuescore	UK Ranking	Market Position
Manchester	Major City	766	2	Upper Middle
Birmingham	Major City	686	3	Upper Middle
Chester	Major Regional	297	35	Upper Middle
Worcester	Major Regional	234	59	Middle
Hereford	Regional	224	64	Middle
Hanley	Regional	222	67	Middle
Wolverhampton	Regional	204	87	Middle
Wrexham	Regional	201	88	Middle
Shrewsbury	**Regional**	**179**	**118**	**Middle**
Walsall	Regional	178	121	Lower Middle
Telford	Regional	165	141	Middle
Kidderminster	Regional	140	178	Lower Middle
Redditch	Regional	139	181	Lower Middle
Stafford	Regional	136	186	Middle
Oswestry	**Sub-Regional**	**81**	**343**	**Middle**
Bromsgrove	Major District	63	460	Middle
Cannock	Major District	59	503	Lower Middle
Wellington	Major District	56	547	Middle
Ludlow	**District**	**40**	**779**	**Middle**
Bridgnorth	**District**	**39**	**803**	**Middle**
Whitchurch	**District**	**39**	**803**	**Lower Middle**
Welshpool	District	32	1,003	Middle
Stone	District	31	1,047	Middle

Shopping Destination*	Location Grade	Venuescore	UK Ranking	Market Position
Market Drayton	**Minor District**	**28**	**1,151**	**Lower Middle**
Ellesmere	**Local**	**15**	**2,034**	**Middle**

Source: Venuescore, Javelin Group 2016

** Albrighton, Bishops Castle, Broseley, Cleobury Mortimer, Craven Arms, Church Stretton, Highley, Much Wenlock, Shifnal and Wem do not feature in Venuescore's list of retail destinations*

3.1.3 The Venuescore database confirms that residents in Shropshire have good access to several large centres, as well as having a choice of smaller centres to meet their day-to-day shopping needs. Shropshire covers a large area which means that some residents of Shropshire are likely to shop as far north as Manchester and in Birmingham to the east, for non-food goods. Shrewsbury is classed as a 'Regional' centre with a Venuescore of 179 and is ranked 118th in the UK. Other 'Regional' centres which achieve a higher Venuescore ranking than Shrewsbury include Hereford (ranked 64th) and Hanley (ranked 67th), whereas Shrewsbury is ranked above Redditch (ranked 181st) and Stafford (ranked 186th).

3.1.4 Oswestry is classed as a 'Sub-Regional' centre with a Venuescore of 81 and is ranked 343rd in the UK. Ludlow, Bridgnorth and Whitchurch are all classed as 'District Centres' with Venuescores of 40, 39 and 39 and are ranked 779th, 803rd and 803rd in the UK respectively.

3.1.5 Market Drayton is classed as a 'Minor District' centre with a Venuescore of 28 and is ranked 1,151st in the UK. Ellesmere is classed as a 'Local' centre with a Venuescore of 15 and is ranked 2,034th in the UK.

3.1.6 Ellesmere aside, none of Shropshire's 'Key Centres' are included within the Venuescore analysis due to these lower-order centres having few national multiple retailers. It should also be noted that the Venuescore data are weighted towards clothing and fashion retailing. Within the sub-region, clothing / fashion shopping facilities are primarily focused in Shrewsbury and some of Shropshire's 'Principal Centres'.

3.1.7 Each 'venue' has an estimated average market position score based on the retailers present, with the 'market position index' for each centre then calculated by comparing the venue's market position score against the average for all venues. The average market position index is 100. Manchester city centre has a market position index of 118, and an 'upper middle' market rating. A further example is Cannock town centre which has a market position index of 85, and a 'lower middle' rating.

3.1.8 The market position relates specifically to the fashion offer together with other easily classified operators, because the range and choice of clothing and fashion shopping is the key driver in the relative attraction of large comparison shopping destinations. Javelin also provides other measures of the strength of centres as outlined below.

3.1.9 Shrewsbury, Oswestry, Ludlow, Bridgnorth and Ellesmere are all classed as having a 'middle' market position. This suggests they do not offer the same level of luxury / high quality retailing as larger centres or centres within areas with higher levels of affluence. However, out of all the shopping destinations in Table 3.1, only Manchester, Birmingham and Chester city centres have an 'upper middle' market position.

3.1.10 In addition to its market position and Venuescore, each destination is also assessed in terms of a range of other attributes, as follows:

- age focus (is the offer targeting younger or older consumers?); and
- fashionability of its offer (is the clothing offer traditional or progressive?).

3.1.11 The Javelin Group classifies retailers in terms of their 'fashionability', ranging from 'traditional' at one end, then 'updated classic', 'fashion moderate', 'fashion forward' through to 'progressive' at the other, i.e. least fashionable to the most fashionable. This classification is only reliable for larger centres because it focuses on national multiples rather than independent outlets.

3.1.12 The age position of the fashion offer is also classified, ranging from ‘young’, ‘middle’ to ‘old’, with retailers such as Hollister, H&M, Miss Selfridge and Superdry appealing more to the young and brands such as Wallis and Edinburgh Woollen Mill appealing more to an older age bracket.

3.1.13 Shrewsbury mostly caters for older customers, being described as ‘updated classic’ by Javelin, which reflects the older demographic profile within Shropshire. Oswestry and Market Drayton as also described as ‘updated classic’, whilst Ludlow, Bridgnorth and Whitchurch are all described as ‘traditional’. Ellesmere is too small a centre to obtain a fashion position classification.

3.1.14 The Javelin information outlined above indicates that, unsurprisingly, Shrewsbury is the most significant shopping destination in Shropshire and therefore has the best prospects for attracting future growth and investment.

3.2 Goad Analysis

3.2.1 Table 3.2 below, sets out the number of outlets and the amount of floorspace within each of Shropshire's Strategic and Principal Centres. This information is based on when Experian last surveyed each centre, as follows: Shrewsbury – May 2019; Bridgnorth – May 2018; Ludlow – September 2018; Market Drayton – May 2018; Oswestry – July 2018; and Whitchurch – November 2017.

Table 3.2 Number of Outlets and amount of Floorspace within Shropshire's Strategic and Principal Centres

	Shrewsbury		Bridgnorth		Ludlow		Market Drayton		Oswestry		Whitchurch	
	No. of Units	Floorspace (sq.m)	No. of Units	Floorspace (sq.m)	No. of Units	Floorspace (sq.m)	No. of Units	Floorspace (sq.m)	No. of Units	Floorspace (sq.m)	No. of Units	Floorspace (sq.m)
Comparison (A1)	272	51,600	83	11,640	96	11,620	51	14,280	110	22,450	69	10,410
Convenience (A1)	32	4,990	15	4,450	23	7,210	15	7,060	29	13,670	17	5,690
Retail Services (A1)	67	5,840	22	2,030	18	1,400	21	1,510	43	3,460	23	1,540
Professional (A2)	33	5,330	11	1,920	12	1,200	9	1,520	22	3,510	8	1,090
Food and Drink (A3-A5)	81	12,700	25	3,690	31	3,450	23	2,800	46	7,220	22	2,570
Miscellaneous	3	220	2	390	2	470	4	310	2	360	5	860
Vacant	80	17,100	14	1,150	23	3,530	22	3,270	31	4,570	21	3,030
Total	**568**	**97,780**	**172**	**25,240**	**205**	**28,880**	**145**	**30,750**	**283**	**55,240**	**165**	**25,190**

Source: Experian Goad

3.2.2 Table 3.2 above shows that Shrewsbury is by far the largest town centre in Shropshire, with some 568 units occupying an aggregate floorspace of 97,780 sq.m gross.

3.2.3 Bridgnorth, Ludlow, Market Drayton, Oswestry and Whitchurch each have substantially fewer units than Shrewsbury, the largest being Oswestry with 283 units, almost exactly half the number in Shrewsbury. Oswestry is also the second-largest centre in terms of floorspace (55,240 sq.m gross). The average number of units within these five centres is 194 and the average amount of floorspace is 33,060 sq.m gross.

3.3 Summary

3.3.1 Venuescore classifies Shrewsbury as a ‘Regional’ centre and its UK ranking is significantly higher than other centres within Shropshire. Shrewsbury also has a significantly greater number of retail and leisure units and amount of floorspace, compared with the other centres within Shropshire.

3.3.2 Venuescore classifies Bridgnorth, Ludlow, Market Drayton, Oswestry and Whitchurch as either ‘Sub-Regional’, ‘District’ or ‘Minor District’ centres and they are achieve a much lower Venuescore ranking than Shrewsbury, with Oswestry being the only other centre to be placed within the top 750 centres in the UK. As set out above, these five centres generally have a similar number of units and amount of floorspace.

4 Health Check Assessments

4.1 Introduction

4.1.1 This section provides health check assessments of Shrewsbury, Bridgnorth, Ludlow, Market Drayton, Oswestry and Whitchurch based on the key indicators of vitality and viability set out in the Planning Practice Guidance[4].

4.1.2 The audit of facilities in the centres is based on an Experian Goad plan for each centre updated by Stantec in June and July 2020. The Goad definition of these centres broadly reflects the centre boundaries as defined in the development plan. It is preferable to utilise the Experian Goad plans as they contain a lot of background data useful for the analysis of town centre health.

4.2 Town Centre Health Checks

4.2.1 The six town centres – Shrewsbury, Oswestry, Ludlow, Bridgnorth, Whitchurch and Market Drayton – are identified on the Policies Map associated with the Shropshire Council Site Allocations and Management of Development Plan (2015). Shrewsbury Town Centre is identified as Shropshire's 'strategic centre' within Policy CS15 of the Core Strategy (2011) and, as such, Shrewsbury Town Centre is the preferred location, in Shropshire, for major comparison retail development and large-scale office uses. The remaining five town centres are identified as 'principal centres' which serve local needs and wider service and employment needs. We consider the performance of the centres in turn below.

4.2.2 Whilst we assess the performance of each centre individually, there are certain indicators highlighted within the PPG that lack context unless compared across similar centres in the sub-region, including the average commercial rents achieved in each of the town centres.

Commercial Rent

4.2.3 There are a number of factors which affect the average commercial rents achieved in each of the town centres. They include the quality of the units; the demand for units; and the supply of units, amongst other factors. Table 4.1 below shows the average commercial rents achieved in each of the town centres. Average commercial rents in Shropshire's town centres range from £166 per sq.m (Whitchurch) to £371 per sq.m (Shrewsbury). The average commercial rent achieved across the six town centres is £277 per sq.m.

4.2.4 When reviewing the average commercial rents achieved in each of the centres there are two distinct groups. The average commercial rent achieved in Shrewsbury, Bridgnorth and Ludlow is above £300 per sq.m, whereas the average commercial rent achieved in Oswestry, Market Drayton and Whitchurch is below £200 per sq.m.

4.2.5 We consider this to be due to Shrewsbury being the largest centre within Shropshire and, in the case of Ludlow and Bridgnorth, their high-quality physical environment. The average commercial rent achieved in Oswestry is likely to be somewhat suppressed given the close proximity and good transport links to Shrewsbury and to other larger centres outside of Shropshire including Wrexham where there is likely to be larger draw due to their retail offering. This is discussed further within the individual health checks below.

[4] Paragraph: 006 Reference ID: 2b-006-20190722

Table 4.1 Comparison of average achieved commercial rent across town centres.

Town Centre	Average Commercial Rent (£ per sq.m)[5]
Shrewsbury	371
Oswestry	190
Ludlow	302
Bridgnorth	311
Whitchurch	166
Market Drayton	173
Average	**277**

4.3 Shrewsbury Town Centre

4.3.1 Shrewsbury Town Centre is the largest centre within Shropshire, in terms of the number of units. Shrewsbury historically is a railway town which was relatively unaffected by the industrial revolution and World War II. As such, the town benefits from a number of examples of well-maintained traditional architecture. The centre's key roles include:

- **Convenience retail shopping –** the town centre is served by two small foodstores, namely Little Waitrose (490 sq.m gross) and Tesco Express (330 sq.m gross). Those foodstores are supported by two bakers, a butchers and several smaller convenience stores including confectioners, tobacconists and off-licenses. There are a number of large out-of-centre foodstores in Shrewsbury, including Tesco Extra, Sainsbury's – Morrisons, Asda, Lidl and Aldi – which cater for the needs of the local population.
- **Comparison retail shopping –** the town centre contains a broad range of national multiple comparison goods retailers including Accessorize, Boots, Clintons, EE, Game, Ernest Jones, H&M, HMV, Home Bargains, JD, Laura Ashley, Marks & Spencer, O2, Paperchase, Pandora, Primark, River Island, Specsavers, Superdrug, The Body Shop, Topshop, Waterstones, WHSmith and Wilko, amongst others.
- **Services –** including seven banks (including Lloyds, NatWest, HSBC and Halifax), three building societies (Nationwide, Principality and The West Bromwich), 66 restaurants/cafés (including Pizza Express, Costa, Caffé Nero, Starbucks and Hickory's Smokehouse), 15 fast-food takeaways (including Subway, KFC and Pret a Manger), seven travel agents (including TUI and Hays) and 51 hairdressers/beauty parlours.
- **Entertainment –** including 14 public houses, six bars, a cinema, a nightclub and two health clubs.
- **Community Facilities –** including seven opticians, four dental surgeries, four places of worship, four pharmacies and a doctor's surgery.

Previous Findings

4.3.2 The Shrewsbury Retail Study Update 2010 found that the town centre's retail offer was underpinned by its comparison goods provision and was anchored by Marks & Spencer and Rackhams. It was noted that the proportion of convenience goods retailers was below average.

4.3.3 The 2010 update also found that the Tudor architecture created a very attractive shopping environment which was in stark contrast to many 'typical' town centres, and there was thought to be a good mixture of independent and national multiple retailers.

[5] Source: https://www.tax.service.gov.uk/business-rates-find/search

Diversity of Uses

4.3.4 Shrewsbury Town Centre contains a total of 567 retail / service units, with a combined floorspace of 97,430 sq.m gross. The diversity of uses present in Shrewsbury Town Centre in terms of the number and proportion of units and floorspace, is set out in Table 4.3 below, compared with the Goad national average as of July 2019.

Table 4.3 Diversity of Uses Table for Shrewsbury Town Centre

Shrewsbury Town Centre – Diversity of uses						
Category	**No. of units**	**% of total units**	**UK (%)**	**Floorspace (sq.m)**	**Floorspace (%)**	**UK (%)**
Comparison (A1)	271	47.8	37.1	51,370	52.7	42.7
Convenience (A1)	32	5.6	10.0	4,930	5.1	18.6
Retail Services (A1)	69	12.2	13.4	6,740	6.9	6.7
Professional Services (A2)	34	6.0	7.6	5,770	5.9	6.2
Food and Drink (A3-A5)	84	14.8	17.9	12,970	13.3	13.2
Miscellaneous	3	0.5	1.2	220	0.2	0.9
Vacant	74	13.1	12.8	15,430	15.8	11.8
Total	**567**	**100**	**100**	**97,430**	**100**	**100**

Source: Stantec survey and Goad Experian (for current national averages)

4.3.5 The proportions of units occupied by comparison goods retailers (47.8 per cent) and associated floorspace (52.7 per cent) are each approximately 10 percentage points above the national average (37.1 per cent and 42.7 per cent, respectively). Shrewsbury Town Centre benefits from an array of national multiple comparison goods retailers, which are predominantly located along Pride Hill, High Street and The Square. Shrewsbury Town Centre also accommodates three shopping centres, namely: Pride Hill Centre, Darwin Shopping Centre and Riverside Mall.

4.3.6 Convenience goods retailers account for 5.6 per cent of units within Shrewsbury Town Centre and 5.1 per cent of floorspace, both of which are significantly below the UK averages (10.0 per cent and 18.6 per cent, respectively). This is due to the lack of a large foodstore within the town centre. There are a number of small convenience good retailers present in the town centre including Little Waitrose, Tesco Express, bakers, butchers, greengrocers and off-licenses. However, it should be noted that the town centre convenience offer is supplemented by a number of larger out-of-centre foodstores.

4.3.7 Retail services in the town centre are similar to the national average, both in terms of the proportion of units and floorspace. This sector is dominated by hairdressers and beauty parlours, which are largely located in peripheral areas of the town centre including Mardol, Wyle Cop and Castle Street.

4.3.8 The proportions of units occupied by professional services (6.0 per cent) and associated floorspace (5.9 per cent) are broadly similar to the national average (7.6 per cent and 6.2 per cent, respectively). Professional services include banks, building societies and estate agents, amongst other uses, and they tend to be located to the south west of the centre including at Barker Street and Mardol Head.

4.3.9 The number of units occupied by food and drink outlets (14.8 per cent) is slightly below the national average (17.9 per cent). The amount of floorspace occupied by food and drink outlets (13.3 per cent) is similar to the national average (13.2 per cent). Shrewsbury Town Centre accommodates a large number of national multiple food and drink outlets including Philpotts, Costa, Pizza Express, Caffé Nero, KFC, Carluccio's, Domino's Pizza and Starbucks, which are supported by a large number of independent food and drink outlets.

Proportion of Vacant Property

4.3.10 The proportion of vacant units (13.1 per cent) is similar to the national average (12.8 per cent), whereas the proportion of vacant floorspace (15.8 per cent) is above the UK average (11.8 per cent). This suggests that there is a moderate amount of large vacant units, which is confirmed by the analysis outlined below.

4.3.11 In total there were 74 vacant units within Shrewsbury Town Centre, 14 of which are located within the Pride Hill Centre, 11 in Darwin Shopping Centre, eight on Wyle Cop and five on Castle Street. The amount of vacant floorspace equates to 15,430sq.m gross. Seven of the vacant units are each larger than 500 sq.m, including 19 Pride Hill Centre (2,510 sq.m gross), 37 High Street (1,260 sq.m gross), 44-48 Pride Hill Centre (1,220 sq.m gross), 2 Darwin Shopping Centre (1,100 sq.m gross), Lower Floor 5 Darwin Shopping Centre (760 sq.m gross), 23 Pride Hill Centre (610 sq.m gross) and 10a Pride Hill Centre (540 sq.m gross).

4.3.12 It is worth noting that if the three largest vacant units were re-occupied, the proportion of vacant floorspace would decrease to 11.5 per cent, which is below the national average.

4.3.13 The analysis above could indicate a surplus of retail floorspace in Shrewsbury Town Centre, and therefore the Council might wish to consider reconfiguring/redeveloping the Riverside Mall and Pride Hill Centre and focus the majority of retail towards the Darwin Shopping Centre. This would create a more concentrated retail core and allow other areas of the town centre to be developed for non-retail uses.

4.3.14 The Retail Study Update 2010 recorded 88 vacant units in Shrewsbury Town Centre (14.0 per cent of units), and a total of 12,240 sq.m of vacant floorspace (10.6 per cent of floorspace within the town centre). The number of vacant units has decreased by 8 units whereas the amount of vacant floorspace has increased by 4,860 sq.m gross. This demonstrates that there is a good turnover of vacant properties; however, larger properties have become and remain vacant.

Retailer Representation

4.3.15 As set out earlier, Shrewsbury Town Centre contains a broad range of national multiple retailers including (amongst others) greetings card shops (Card Factory and Clintons); opticians (Specsavers and Vision Express); bookshops (Waterstones and The Works); chemists (Boots); fashion and footwear operators (including French Connection, H&M, Barbour, Office, Clarks and Topman); department stores (Marks & Spencer); banks (including Lloyds, NatWest and HSBC); discount retailers (Wilko, Poundland and Home Bargains); stationers (WHSmith, Paperchase and Ryman); and, jewellers (including Ernest Jones).

4.3.16 There has, though, recently been a number of notable closures of national multiple operators, largely in the comparison goods retailer sector, including Next, House of Fraser, Ann Summers, Maplin, Argos, New Look Mens, McDonald's and Burger King. This is reflective of the ongoing restructuring of the high street/high profile casualties and is not necessarily a reflection on the attraction of Shrewsbury Town Centre, but clearly the loss of these operators does affect the health of the town centre. It is also worth noting that some of these retailers have relocated to out-of-centre locations within foodstores and to retail parks.

4.3.17 Shrewsbury Market Hall hosts a market every Tuesday, Wednesday, Friday and Saturday, whilst a few traders open every Thursday. The market traders operate on individual opening hours; however, the majority operate between 9.00am and 3.30pm. Shrewsbury Market Hall was crowned the best in the country in 2018 and has been included within the top ten in 2019 and 2020. The market accommodates a wide range of comparison and convenience goods retailers including butchers, fishmongers, bakers, greengrocers, florists, jewellers, confectioners and craft stores.

4.3.18 The town centre boasts a wide range of food and drink outlets including both independent outlets and national chains. The town centre's food and drink offer comprises public houses (including The Nags Head, Yorkshire House, The Bull Inn and Montgomery's Tower);

restaurants (including Carluccio's, Hickory's Smokehouse and The Royal Siam); cafés (including Caffé Nero, Philpotts and Old Market Hall); and, hot food takeaways (such as The York Roast Co., Dominos and Darwin's).

Accessibility and Pedestrian Flows

4.3.19 Shrewsbury Town Centre is highly accessible by a range of transport measures. Shrewsbury train station is located in an edge-of-centre location approximately 200m to the north west of the town centre. The train station provides services to several locations including Birmingham, Manchester, Cardiff and Carmarthen. Shrewsbury bus station is located on Raven Meadows and provides services to Oswestry, Telford and Market Drayton, amongst others.

4.3.20 Vehicle access to Shrewsbury Town Centre is very good with part of the town centre located on the A5191 (Wyle Cop, High Street, Mardol Head, Bell Stone and Barker Street) and the A458 (Mardol Quay and Smithfield Road). There are 11 car parks within the town centre, four of which are managed by Shropshire Council. The multi-storey car park to the rear of Riverside Mall contains 920 car parking spaces but is under-utilised and is regularly less than 50 per cent full.

4.3.21 A significant proportion of the town centre is pedestrianised including Roushill Bank, The Square, Pride Hill and Butchers Row. More generally, pedestrian access is good across the town centre as most areas have wide pavements and there is a large number of formal crossing points.

Physical Environment

4.3.22 Shrewsbury Town Centre is an attractive town centre which benefits from numerous examples of well-preserved traditional architecture. There is a large amount of street furniture including benches, bins, street lighting, hanging baskets and planters which are high quality and sensitive to the historic setting of the town centre.

4.3.23 One area in need of improvement is the area surrounding River Meadows multi-storey car park and Shrewsbury bus station. The façades of these buildings are dated and in need of renovation. The bus station is an important entrance – often visitors' first impression of the town centre – and therefore some consideration should be given to how this area could be improved whilst maintaining its practical use as a car park and bus station.

4.3.24 The entirety of Shrewsbury Town Centre is located within a conservation area; as such, any development plans will have to be sensitive to this designation. There are over 300 listed buildings within the town centre including the Grade I listed Abbot's House and Old Market Hall.

Balance Between Independent and Multiple Stores

4.3.25 The town centre accommodates a large number of national multiple comparison goods retailers; however, the number of national multiple convenience goods retailers is somewhat limited given the relative size of the town centre. Shrewsbury Town Centre accommodates a large number of independent retailers across a number of sectors which serve the local population.

Evidence of Barriers to Business

4.3.26 There is no obvious evidence of barriers to business within Shrewsbury Town Centre. There is a number of vacant units which vary in size and quality. The town centre also accommodates a wide range of national multiple retailers, which indicates a good level of demand for space in the town centre.

Extent of Evening and Night-time Economy Offer

4.3.27 The town centre accommodates a large number of evening and night-time uses including public houses, bars, a nightclub, restaurants and a cinema/theatre. These uses are largely spread across the town centre.

4.3.28 The Old Market Hall Theatre and Cinema is located in The Square and hosts a mixture of live action shows and the latest cinematic releases.

4.3.29 The above demonstrates that the evening and night-time economy in Shrewsbury Town Centre caters for a wide-ranging audience.

Summary

4.3.30 Shrewsbury Town Centre is performing very well. There is a good provision of comparison goods retailers including a large number of national multiples. Whilst there is a slight under-provision of convenience goods retailers, those that are present are supported by large out-of-centre foodstores. The town centre benefits from an historic setting which has been sensitively preserved, supported by the conservation area designation and a large number of listed buildings.

4.3.31 The town centre is highly accessible and has good public transport links including a train station in an edge-of-centre location and a bus station within the centre. This helps the centre to maintain its status as a strategic centre at the top of the retail centre hierarchy in Shropshire.

4.4 Oswestry Town Centre

4.4.1 Oswestry Town Centre is the second largest town centre within Shropshire and it is an ancient market town. The primary shopping area is concentrated around Cross Street, Bailey Street, New Street, Albion Hill and Bailey Head. The centre's key roles include:

- **Convenience retail shopping –** the town centre is served by four large foodstores, namely Sainsbury's, Morrisons, Marks & Spencer Simply Food and Aldi, along with two frozen food retailers, namely Iceland and Heron Foods. The town centre also accommodates a number of smaller convenience goods retailers including six bakers, four butchers and a greengrocer.
- **Comparison retail shopping –** the town centre contains a number of national multiple retailers including Wilko, The Edinburgh Woollen Mill, Boots, Specsavers, Home Bargains, Card Factory, Clarks, New Look, The Works, Superdrug, Dorothy Perkins, Sports Direct, O2, WHSmith and Vision Express.
- **Services –** seven banks (including HSBC, NatWest and TSB), three building societies (The West Bromwich, Principality and Nationwide), 28 restaurants/cafés (including Fat Rabbit, Scotty's, Country Kitchen, Sebastians and Prezzo) and 34 hairdressers/beauty parlours.
- **Entertainment –** including 16 public houses, a cinema and a nightclub.
- **Community Facilities –** including a library, a community centre and three places of worship.

Previous Findings

4.4.2 The Oswestry Borough Council Retail Study Update (2008) found that Oswestry Town Centre displayed reasonable signs of vitality and viability for a town of its size. The 2008 study found there to be an acceptable range of shops and services available in accessible locations, but a higher than average vacancy rate was a concern.

Diversity of Uses

4.4.3 Oswestry Town Centre contains a total of 283 retail/service units with a combined floorspace of 55,310 sq.m gross. The diversity of uses present in Oswestry Town Centre in terms of the number and proportion of units and floorspace is set out in Table 4.4 below, compared with the Goad national average.

Table 4.4 Diversity of Uses Table for Oswestry Town Centre

Oswestry Town Centre – Diversity of uses						
Category	**No. of units**	**% of total units**	**UK (%)**	**Floorspace (sq.m)**	**Floorspace (%)**	**UK (%)**
Comparison (A1)	108	38.1	37.1	22,030	39.8	42.7
Convenience (A1)	29	10.3	10.0	13,660	24.7	18.6
Retail Services (A1)	43	15.2	13.4	3,490	6.3	6.7
Professional Services (A2)	23	8.1	7.6	3,580	6.5	6.2
Food and Drink (A3-A5)	47	16.6	17.9	7,330	13.1	13.2
Miscellaneous	2	0.7	1.2	360	0.7	0.9
Vacant	31	11.0	12.8	4,860	8.8	11.8
Total	**283**	**100**	**100**	**55,310**	**100**	**100**

Source: Stantec survey and Goad Experian (for current national averages)

4.4.4 The proportion of comparison goods retailers (38.1 per cent) and associated floorspace (39.8 per cent) in Oswestry Town Centre are close to the national average (37.1 per cent and 42.7 per cent, respectively). There is a generous provision of national multiple comparison goods retailers within the town centre, which tend to be located along Church Street, Cross Street and Bailey Street.

4.4.5 The proportion of convenience goods retail units (10.3 per cent) is in line with the national average (10.0 per cent), and 24.7 per cent of floorspace within Oswestry Town Centre is occupied by convenience goods retailers, which is higher than the national average (18.6 per cent). For the purposes of the Goad data all of the floorspace occupied by Sainsbury's, Morrisons and Aldi is attributed to the sale of convenience retail goods. We note that a varying proportion of floorspace within these foodstores is used for the sale of comparison retail goods and therefore, in practice, the proportion of convenience retail goods floorspace is lower than suggested by the Goad data.

4.4.6 Some 15.2 per cent of units and 6.3 per cent of floorspace in Oswestry Town Centre is occupied by retail services, which is broadly comparable to the national average (13.4 per cent and 6.7 per cent, respectively). This sector is largely made up of hairdressers and beauty salons which are predominantly located on Leg Street and Beatrice Street.

4.4.7 The proportion of professional services units (8.1 per cent) and associated floorspace (6.5 per cent) are similar to the national average (7.6 per cent and 6.2 per cent, respectively). The professional services sector comprises banks, building societies and estate agents, the majority of which are located on Church Street and Leg Street.

4.4.8 The proportions of food and drink outlets and associated floorspace in Oswestry Town Centre are both broadly comparable to the UK average. Food and drink outlets are evenly dispersed throughout the town centre.

Proportion of Vacant Property

4.4.9 The proportion of vacant units (11.0 per cent) is slightly below the national average (12.8 per cent). The proportion of vacant floorspace (8.8 per cent) is also below the national average (11.8 per cent). This is an indication of generally good town centre health. There are seven vacant units above 200 sq.m, including 12 Cross Street (580 sq.m gross), 14-16 Cross Street (480 sq.m gross), 6 Smithfield Street (440 sq.m gross), 5-7 Willow Street (270 sq.m gross), Market Gate, Salop Road (220 sq.m gross), 33A Willow Street (220 sq.m gross) and The Citadel, King Street (210 sq.m gross).

4.4.10 In total there are 31 vacant units within Oswestry Town Centre, seven of which are located on Willow Street, five on Beatrice Street, four on Bailey Street and four on Cross Street. We have also identified a cluster of vacant units to the north of Bailey Street.

4.4.11 The 2008 Retail Study Update recorded 42 vacant units, equivalent to 14 per cent of total units. The latest survey highlights a substantial reduction in vacant units within Oswestry Town Centre, which is a sign of improved town centre health.

Retailer Representation

4.4.12 As set out earlier, Oswestry Town Centre accommodates a range of national multiple retailers including booksellers (The Works); building societies (Nationwide); greetings card shops (Card Factory); chemists (Boots and Superdrug); fashion and footwear operators (M&Co, New Look, Shoe Zone, Dorothy Perkins, Clarks and The Edinburgh Woollen Mill); sports goods (Sports Direct); opticians (Specsavers and Vision Express); discount retailers (Poundland, B&M Bargains, Home Bargains and Poundstretcher); and stationers (WHSmith). It is noted that in the last few years both Bonmarché and Peacocks have ceased trading within the town centre.

4.4.13 Oswestry accommodates both an indoor and outdoor market within the town centre on Wednesday, Friday and Saturday every week. The market's offer includes a butcher, a fishmonger, bakers, greengrocers and a jeweller.

4.4.14 The town centre's food and drink offer mainly comprises public houses (including The Fox Inn, The Butchers Arm and the Kings Head); restaurants (including The Cantonese, Sebastians and Red Rose); cafés (including Milano's, Country Kitchen and Willow Eatery); and hot food takeaways (including New City, Eastern Eye and Pizza Bella).

Accessibility and Pedestrian Flows

4.4.15 Oswestry is one of three town centres within Shropshire which does not benefit from a train station. The nearest train station to Oswestry is Gobowen train station approximately 2.5 miles to the north east of the town centre. Gobowen train station provides services between Shrewsbury and Chester and accommodates a large car parking area.

4.4.16 There are nine bus stops within the town centre, providing services to Wrexham, Shrewsbury, Ellesmere, Llanfyllin and Machynlleth, amongst other destinations. Oswestry Bus Station is located on Beatrice Street.

4.4.17 Vehicle access to Oswestry Town Centre is good, with the town centre being located less than a mile from the A5. There are nine car parks within the town centre, four of which are large surface car parks serving large foodstores, namely Morrisons, Sainsbury's, Aldi and Marks & Spencer Simply Food.

4.4.18 Bailey Street is the only pedestrianised area of the town centre. In most other parts of the town centre the pavement is sufficiently wide to allow pedestrians to travel through the centre easily.

Physical Environment

4.4.19 The physical environment in Oswestry Town Centre is generally attractive. The town centre benefits from a number of historic buildings which have been well maintained and provide character to the town centre, including around The Cross and Bailey Street. One area in need of improvement is New Street; many of the units on New Street appear dated and in need of renovation.

4.4.20 New Street is also designated as a primary shopping area. However, the southern side of New Street includes a large area of inactive frontages and some consideration should be given to amending this designation.

4.4.21 Oswestry Town Centre benefits from a generous provision of high-quality street furniture including benches, planters, signposts and street lighting, throughout most parts of the town centre. We also noted a significant amount of tree planting in the town centre.

4.4.22 Similar to Shrewsbury, Oswestry Town Centre is wholly located within a conservation area. The town centre also contains approximately 70 listed buildings including Grade I listed Llwyd Mansion, which accommodates a hairdressers, and Grade II* listed Hermon Chapel and 29 Bailey Street, which is occupied by a florists.

Balance between Independent and Multiple Stores

4.4.23 Oswestry benefits from a significant provision of national multiple retailers, for a centre of its size. The town centre also accommodates an array of independent retailers.

Evidence of Barriers to Business

4.4.24 There is no obvious evidence of barriers to business; perceived demand is high and there is a supply of vacant units of varying sizes. Similar to the other market towns within Shropshire, a barrier to business would be the draw of the retail offering in Shrewsbury and Wrexham, both of which are more attractive to both customers and potential operators.

Extent of Evening and Night-time Economy Offer

4.4.25 There is a good provision of restaurants, public houses and hot food takeaways within Oswestry Town Centre. They are distributed evenly throughout the town centre with small clusters concentrated around Bailey Street, Beatrice Street and Willow Street.

4.4.26 As demonstrated above, there is a mixture of uses present in Oswestry Town Centre which will attract a range of people to the town centre in the evening.

Summary

4.4.27 Oswestry Town Centre is performing well. The proportion of comparison and convenience goods retailers and services present in the town centre is similar to the respective national averages, and the vacancy rate is below the national average.

4.4.28 The town centre accommodates a good mix of national multiple and independent retailers and is accessible by motor vehicle but does not benefit from a train station. The town centre also benefits from a high-quality physical environment.

4.4.29 The performance of the town centre is largely similar to when it was last surveyed in 2008; however, the vacancy rate has improved significantly, which is a positive indicator of town centre health.

4.5 Ludlow Town Centre

4.5.1 Ludlow Town Centre is the third largest centre within Shropshire, in terms of number of units. Ludlow is a Norman planned town and the town centre layout has largely survived to the current day. The primary shopping area in Ludlow is concentrated around Church Street, High Street, Broad Street, Bull Ring and Tower Street. The centre’s key roles include:

- **Convenience retail shopping –** the town centre is well served by two large foodstores, namely Tesco (2,870 sq.m gross) and Aldi (1,620 sq.m gross). These foodstores are supported by several smaller convenience stores including three butchers, two bakers, a greengrocers and two off-licenses.

- **Comparison retail shopping –** the town centre contains a small number of national multiple retailers including Hallmark, Timpson, Boots, M&Co, The Edinburgh Woollen Mill, Vision Express, WHSmith, Specsavers, White Stuff and Fat Face.
- **Services –** including three banks (Lloyds, NatWest and Barclays), a building society (Nationwide), 21 restaurants/cafés (including Pizza Express and The Olive Branch) and 19 hairdressers/beauty parlours.
- **Entertainment –** including eight public houses, three bars and a social club.
- **Community Facilities –** including three opticians, a health centre, a place of worship and a library.

Previous Findings

4.5.2 The South Shropshire District Retail and Leisure Study (2007) found Ludlow to be a vital and viable town centre, and it identified a strong demand from retailers seeking to locate in the town. The town centre environment was well-maintained at the time of the 2007 Study, which also found that the vacancy rate had decreased since the previous study.

Diversity of Uses

4.5.3 Ludlow Town Centre contains a total of 207 retail/service units, with a combined floorspace of 29,120 sq.m gross. The diversity of uses present in Ludlow Town Centre in terms of the number and proportion of units and floorspace is set out in Table 4.5 below, compared with the Goad national average.

Table 4.5 Diversity of Uses Table for Ludlow Town Centre

Ludlow Town Centre – Diversity of uses						
Category	**No. of units**	**% of total units**	**UK (%)**	**Floorspace (sq.m)**	**Floorspace (%)**	**UK (%)**
Comparison (A1)	93	44.9	37.1	11,110	38.1	42.7
Convenience (A1)	24	11.6	10.0	7,290	25.0	18.6
Retail Services (A1)	21	10.1	13.4	1,630	5.6	6.7
Professional Services (A2)	13	6.3	7.6	1,290	4.4	6.2
Food and Drink (A3-A5)	32	15.5	17.9	3,580	12.3	13.2
Miscellaneous	2	1.0	1.2	470	1.6	0.9
Vacant	22	10.6	12.8	3,750	12.9	11.8
Total	**207**	**100**	**100**	**29,120**	**100**	**100**

Source: Stantec survey and Goad Experian (for current national averages)

4.5.4 Some 44.9 per cent of units are occupied by comparison goods retailers, which is significantly above the national average (37.1 per cent), whereas the proportion of floorspace occupied by comparison goods retailers (38.1 per cent) is slightly below the national average (42.7 per cent). The comparison goods retailers are mostly located within the traditional town centre, notably along Castle Street, King Street and High Street. Given the historic nature of these streets the retail units are small.

4.5.5 The proportion of convenience goods retailers (11.6 per cent) is close to the national average (10.0 per cent) and the proportion of floorspace occupied by convenience goods retailers (25.0 per cent) is above the national average (18.6 per cent). For the purposes of the Goad data, the two foodstores (Tesco and Aldi) are both classified as convenience goods retails. As with Oswestry, we note that a proportion of the floorspace within these foodstores will be dedicated to the sale of comparison retail goods and therefore the proportion of convenience goods floorspace will be lower in reality than suggested by the Goad data.

4.5.6 Retail services in Ludlow Town Centre are slightly below the national average both in terms of the proportion of units and floorspace. This sector in Ludlow is made up of hairdressers, beauty salons and a travel agent, which are mostly located towards the south of the town centre.

4.5.7 The proportions of professional services (6.3 per cent) and associated floorspace (4.4 per cent) are broadly comparable to the national averages (7.6 per cent and 6.2 per cent, respectively). Professional services in Ludlow Town Centre are primarily located on Bull Ring and Broad Street and comprise banks, building societies and estate agencies.

4.5.8 Some 15.5 per cent of units and 12.3 per cent of floorspace are occupied by food and drink outlets, both of which are slightly below the national averages (17.9 per cent and 13.2 per cent, respectively).

Proportion of Vacant Property

4.5.9 In total there are 22 vacant units within the town centre, six of which are located on Corve Street, five on Broad Street and three on Bull Ring. Vacant units account for 10.6 per cent of total town centre units and 12.9 per cent of total floorspace, both of which are similar to the national average (12.8 per cent and 11.8 per cent, respectively). Four vacant units are above 200 sq.m: the former Budgens store, Upper Galderford (1,440 sq.m gross), 9-10 Bull Ring (280 sq.m gross), 147-148 Corve Street (270 sq.m gross) and 17 Broad Street (230 sq.m gross).

4.5.10 The 2007 Study recorded 10 vacant units, equivalent to 4.5 per cent of units and 5.1 per cent of floorspace. The latest survey highlights a significant increase in vacant units over the last 13 years. Whilst the current unit vacancy rate is below the national average, it should continue to be carefully monitored.

Retailer Representation

4.5.11 Ludlow Town Centre contains a limited range of national multiple outlets including banks (Barclays, NatWest and Lloyds); building societies (Nationwide); chemists (Boots); fashion and footwear operators (including The Edinburgh Woollen Mill, Fat Face and White Stuff); health shops (Holland and Barrett); opticians (Specsavers and Vision Express); shoe repairers (Timpson); stationers (WHSmith); and, a greetings card shop (Hallmark).

4.5.12 There has recently been a number of notable closures of national multiple operators in Ludlow including HSBC and Budgens. This is symptomatic of the ongoing restructuring of the high street/high profile casualties and is not a reflection on the attraction of Ludlow Town Centre.

4.5.13 National multiple retailers in Ludlow are supported by a generous provision of independent retailers.

4.5.14 Ludlow accommodates an open-air market in Castle Square every Monday, Wednesday, Friday and Saturday. Traders sell both comparison retail and convenience retail goods including pet food, clothing, china goods and delicatessens. Anecdotal evidence suggests the market provides a good offering of high-quality goods and is one of the top attractions within the town centre.

4.5.15 The food and drink offer within Ludlow Town Centre comprises public houses (including The Compasses, Rose & Crown and Blue Boar); restaurants (including Bistro Seven of Ludlow, Pizza Express and The Feathers); cafés (including Aragon’s, Taste at No.1 and Itadakizen); and, hot food takeaways (including Thai Box and Evergreen).

Accessibility and Pedestrian Flows

4.5.16 Ludlow Town Centre is highly accessible by public transport. Ludlow train station is located adjacent to the town centre boundary and provides services to Carmarthen, Shrewsbury, Crewe and Manchester. There are eight bus stops within the town centre, providing services to Shrewsbury and Leominster amongst other destinations.

4.5.17 Vehicle access to Ludlow is good as it is located close to the A49, which connects to Shrewsbury to the north and Hereford to the south. There are four car parks within the town centre including large surface car parks servicing both Aldi and Tesco. It is also worth noting that large parts of the town centre benefit from on-street parking. A one-way system is in operation around parts of the town centre to overcome narrow streets, which helps to maintain a good traffic flow.

4.5.18 Some of the pavements in the historic town centre around Castle Square, High Street and King Street are very narrow. This has a negative impact on pedestrian accessibility through the centre. The only part of the town centre that is pedestrianised is Castle Street.

Physical Environment

4.5.19 The physical environment is very attractive throughout the majority of Ludlow Town Centre. The town centre benefits from numerous examples of high-quality, well-maintained historic architecture, most notably around Castle Square.

4.5.20 The town centre is located wholly within a conservation area, and any future development plans will need to be sensitive to this designation. There are approximately 500 listed buildings in Ludlow including five Grade I listed buildings in the town centre, namely: The Guildhall, The Butter Cross, Church of St Laurence, The Reader's House and Feathers Hotel.

Balance between Independent and Multiple Stores

4.5.21 Ludlow Town Centre possesses a good range of upmarket independent retailers whilst also accommodating a limited range of national multiple retailers. Ludlow thus accommodates a healthy mix of both independent and national multiple retailers.

Evidence of Barriers to Business

4.5.22 There is no obvious evidence of barriers to business specific to Ludlow Town Centre. The centre is highly accessible and perceived demand is relatively high. There is also a number of vacant units which could be re-occupied for main town centre uses.

4.5.23 One potential barrier to business is the relatively small average unit size, which may be problematic to change or expand and therefore may not meet the requirements of certain retailers.

Extent of Evening and Night-time Economy Offer

4.5.24 The evening and night-time economy largely comprises public houses, bars and restaurants. Public houses and restaurants both tend to be concentrated around the traditional town centre.

Summary

4.5.25 Ludlow Town Centre is performing very well. The proportion of comparison goods retailers – a key barometer of the strength of a centre – is above the UK average, and the proportion of convenience goods retailers is similar to the national average. The vacancy rate is also close to the national average, albeit the unit vacancy rate has increased in recent years and therefore careful monitoring and management is required to ensure this does not increase further.

4.5.26 Ludlow Town Centre benefits from a very attractive physical environment and benefits from a large number of upmarket independent retailers, which provides a unique offering. Ludlow is also highly accessible by a range of modes of transport.

4.6 Bridgnorth Town Centre

4.6.1 Bridgnorth Town Centre is the fourth largest centre within Shropshire, in terms of the number of units. The primary shopping area is located along High Street and Whitburn Street. The centre's key roles include:

- **Convenience retail shopping –** the Sainsbury's foodstore on Whitburn Street (2,410 sq.m gross) is the only large foodstore in the town centre and serves main shopping trips and basket / top-up food shopping trips, as well as offering a proportion of non-food goods. The town centre also accommodates a number of small convenience stores including Tesco Express (370 sq.m gross) on High Street, supported by three bakers, two butchers and two off-licenses.
- **Comparison retail shopping –** the town centre contains the following national multiple retailers: M&Co, WHSmith, Boots, Fat Face, The Edinburgh Woollen Mill, Superdrug and Specsavers.
- **Services –** including three banks (HSBC, Barclays and Lloyds), a building society (Nationwide), 18 restaurants/cafés (including Prezzo and Costa) and 21 hairdressers/beauty parlours.
- **Entertainment –** including 11 public houses, three bars and a cinema.
- **Community Facilities –** including a library, a doctor's surgery and a place of worship.

Diversity of Uses

4.6.2 Bridgnorth Town Centre contains a total of 168 retail/service units, with a combined floorspace of 24,450 sq.m gross. The diversity of uses present in Bridgnorth Town Centre in terms of the number and proportion of units and floorspace is set out in Table 4.6 below, compared with the Goad national average.

Table 4.6 Diversity of Uses Table for Bridgnorth Town Centre

Bridgnorth Town Centre – Diversity of uses						
Category	**No. of units**	**% of total units**	**UK (%)**	**Floorspace (sq.m)**	**Floorspace (%)**	**UK (%)**
Comparison (A1)	79	47.0	37.1	10,950	44.8	42.7
Convenience (A1)	15	8.9	10.0	4,450	18.2	18.6
Retail Services (A1)	25	14.9	13.4	2,160	8.8	6.7
Professional Services (A2)	10	6.0	7.6	1,760	7.2	6.2
Food and Drink (A3-A5)	23	13.7	17.9	3,450	14.1	13.2
Miscellaneous	2	1.2	1.2	390	1.6	0.9
Vacant	14	8.3	12.8	1,290	5.3	11.8
Total	**168**	**100**	**100**	**24,450**	**100**	**100**

Source: Stantec survey and Goad Experian (for current national averages)

4.6.3 The proportions of comparison goods retailers (47.0 per cent) and associated floorspace (44.8 per cent) are above the national average (37.1 per cent and 42.7 per cent, respectively). Whilst Bridgnorth is well-represented numerically, the town centre accommodates a limited number of national multiple comparison good retailers. As expected, the comparison goods retailers present in Bridgnorth are largely located within the primary shopping area, namely Whitburn Street and High Street.

4.6.4 The representation by convenience goods retail units (8.9 per cent) and associated floorspace (18.2 per cent) is similar to the national average. Convenience goods retailers are largely located on High Street, whilst the Sainsbury's foodstore is located to the north west of the town centre on Old Smithfield.

4.6.5 Retail services account for 14.9 per cent of total units within the town centre and 8.8 per cent of total floorspace, both of which are broadly similar to the national average (13.4 per cent and 6.7 per cent, respectively). Service sector provision in Bridgnorth largely comprises hairdressers and beauty salons, mainly located along Whitburn Street.

4.6.6 The proportion of professional services and associated floorspace is also similar to the national average. Professional services are distributed evenly throughout the town centre.

4.6.7 Some 13.7 per cent of units are occupied by food and drink outlets, which is slightly below the national average. The proportion of floorspace occupied by food and drink outlets (14.1 per cent) is similar to the national average (13.2 per cent). Food and drink outlets are somewhat concentrated towards the south of the town centre.

Proportion of Vacant Property

4.6.8 The proportion of vacant units (8.3 per cent) and associated floorspace (5.3 per cent) are significantly below the national average (12.8 per cent and 11.8 per cent, respectively).

4.6.9 In total there are 14 vacant units within Bridgnorth Town Centre; six of which are located on High Street and four on Listley Street. All of the vacant units within the town centre are relatively small, with only six greater or equal to 100 sq.m, namely: 25 High Street (180 sq.m gross), 21 High Street (160 sq.m gross), 5 High Street (150 sq.m gross), 38 High Street (130 sq.m gross), 69 Listley Street (120 sq.m gross), 54 High Street (110 sq.m) and 44 High Street (100 sq.m gross).

Retailer Representation

4.6.10 Bridgnorth Town Centre accommodates a limited range of national multiple retailers including chemists (Superdrug and Boots); banks (HSBC and Lloyds); fashion and footwear operators (M&Co, The Edinburgh Woollen Mill and Fat Face); building societies (Nationwide); stationers (WHSmith); health food operators (Holland & Barrett); and, opticians (Specsavers).

4.6.11 The food and drink offer within Bridgnorth Town Centre comprises public houses (including Golden Lion Inn, The Crown and White Lion Inn); restaurants (including Prezzo, Peepo and Himalaya Tandoori); cafés (Bakehouse and Tudor Rooms); and, hot food takeaways (including Shanghai Town and Efes Kebab).

4.6.12 The town council holds a market on Friday and Saturday below the town hall, alongside a speciality market on Sunday. The market accommodates several convenience goods retailers and a few comparison goods retailers.

Accessibility and Pedestrian Flows

4.6.13 Bridgnorth is relatively accessible by public transport. The town centre contains six bus stops, with services running between Wolverhampton, Kidderminster, Telford and Shrewsbury, amongst others. Bridgnorth is one of three towns within Shropshire that does not have a train station, the nearest stations being at Shifnal and Codsall, both approximately nine miles away.

4.6.14 Bridgnorth Town Centre is highly accessible by motor vehicle, given close proximity to the junction of the A442 and the A458. The town centre accommodates five car parks, including two large surface car parks serving Sainsbury's and the library. On-street parking is also available throughout most of the centre.

4.6.15 No sections of the town centre are pedestrianised, but most streets are broad and have very wide pavements, which improves the permeability of the town centre.

Physical Environment

4.6.16 The quality of buildings within Bridgnorth Town Centre is largely positive. There are some good examples of well-maintained, traditional architecture, most notably along High Street. The Town Hall helps to provide a unique character to the primary shopping area.

4.6.17 As noted above, the pavements are very wide throughout the town centre. There is also a generous provision of high-quality street furniture including hanging baskets, street signs and bollards.

4.6.18 Bridgnorth Town Centre is located wholly within a conservation area. The town centre also contains approximately 150 listed buildings including the Grade I listed Bishop Percy's House.

Balance between Independent and Multiple Stores

4.6.19 Bridgnorth Town Centre accommodates several national multiple retailers, and it also benefits from a large number of boutique independent retailers. We consider there to be a good balance between national multiple and independent retailers within Bridgnorth Town Centre.

Evidence of Barriers to Business

4.6.20 There is no obvious evidence of barriers to business specific to Bridgnorth Town Centre. The town centre contains a good offering of both comparison and convenience goods retailers alongside a relatively large services sector. There is a small supply of units which could be repurposed for town centre uses.

Extent of Evening and Night-time Economy Offer

4.6.21 In numerical terms, there is an adequate provision of restaurants, public houses and hot food takeaways within Bridgnorth Town Centre, relative to the national average. These evening economy uses are distributed evenly throughout the centre.

4.6.22 The town centre would, however, benefit from a greater provision of food and drink outlets. Attracting more food and drink operators to Bridgnorth is likely to be challenging in the current market, with many UK restaurants going into administration for a variety of reasons including rising costs and competition amid a consumer spending squeeze.

Summary

4.6.23 Overall, our assessment is that Bridgnorth Town Centre is performing relatively well. The proportion of comparison goods retailers is much higher than the national average, and the proportion of convenience goods retailers is similar to the national average. The vacancy rate in Bridgnorth Town Centre is much lower than the UK average, which is a positive sign of town centre viability, and the town centre benefits from a very positive physical environment which is well maintained.

4.7 Whitchurch Town Centre

4.7.1 Whitchurch Town Centre is the fifth largest centre within Shropshire, in terms of the number of units. The centre's key roles include:

- **Convenience retail shopping –** the town centre is served by two foodstores, namely Tesco (2,510 sq.m gross) and Lidl (1,320 sq.m gross). These foodstores are supported by two butchers, three bakers, two off-licenses and a confectioner.
- **Comparison retail shopping –** the town centre accommodates a number of national multiple comparison retailers including M&Co, Card Factory, WHSmith, Boots and Timpson.
- **Services –** including three banks (Lloyds, Barclays and TSB), 14 restaurants/cafés and 21 hairdressers/beauty parlours.
- **Entertainment –** including nine public houses, a bar and a swimming pool.

- **Community Facilities –** including a library and a place of worship.

Diversity of Uses

4.7.2 Whitchurch Town Centre contains a total of 155 retail/service units, with an aggregate floorspace of 23,770 sq.m gross. The diversity of uses present in Whitchurch Town Centre in terms of the number and proportion of units and floorspace is set out in Table 4.7 below compared with the Goad national average.

Table 4.7 Diversity of Uses Table for Whitchurch Town Centre

Whitchurch Town Centre – Diversity of uses						
Category	**No. of units**	**% of total units**	**UK (%)**	**Floorspace (sq.m)**	**Floorspace (%)**	**UK (%)**
Comparison (A1)	65	42.0	37.1	9,300	39.1	42.7
Convenience (A1)	14	9.0	10.0	5,470	23.0	18.6
Retail Services (A1)	27	17.4	13.4	1,790	7.5	6.7
Professional Services (A2)	7	4.5	7.6	1,050	4.4	6.2
Food and Drink (A3-A5)	24	15.5	17.9	2,980	13.2	13.2
Miscellaneous	4	2.6	1.2	790	3.3	0.9
Vacant	14	9.0	12.8	2,390	10.1	11.8
Total	**155**	**100**	**100**	**23,770**	**100**	**100**

Source: Stantec survey and Goad Experian (for current national averages)

4.7.3 The proportion of comparison goods retailers (42.0 per cent) is above the national average (37.1 per cent), whereas the proportion of associated floorspace (39.1 per cent) is slightly below the national average (42.7 per cent).

4.7.4 Some 9.0 per cent of units in Whitchurch Town Centre are occupied by convenience goods retailers, which is very close to the national average (10.0 per cent). The proportion of convenience goods floorspace (23.0 per cent) is slightly above the national average (18.6 per cent). This is reflective of the large foodstores located towards the periphery of the town centre.

4.7.5 The proportions of retail service units (17.4 per cent) and associated floorspace (7.5 per cent) are slightly above the national averages (13.4 per cent and 6.7 per cent, respectively). The retail services sector comprises hairdressers, beauty salons, drycleaners and travel agents, which are predominantly located on Watergate Street and Green End.

4.7.6 The representation by professional services is slightly below the national average both in terms of the proportion of total units (4.5 per cent compared to 7.6 per cent nationally) and floorspace (4.4 per cent compared to 6.2 per cent nationally).

4.7.7 The proportion of food and drink outlets (15.5 per cent) and associated floorspace (13.2 per cent) are similar to the national averages (17.9 per cent and 13.2 per cent, respectively).

Proportion of Vacant Property

4.7.8 In total there are 14 vacant units within the town centre, four of which are located on High Street, three on Watergate Street, three on Green End, two on Bredwood Arcade, one on Bridgewater Street and one on St Mary's Street. Only four of the vacant units are larger than 200 sq.m, namely: 3 Watergate Street (560 sq.m gross), 40 High Street (340 sq.m gross), 5 Watergate Street (290 sq.m gross) and 16-18 High Street (210 sq.m gross).

4.7.9 The proportion of vacant units (9.0 per cent) and associated floorspace (10.1 per cent) are similar to the national average (12.8 per cent and 11.8 per cent, respectively).

Retailer Representation

4.7.10 Whitchurch Town Centre contains a limited range of national multiple retailers including banks (Barclays and Halifax); stationers (WHSmith); chemists (Boots); greetings card shops (Card Factory); fashion and footwear operators (M&Co); shoe repairers (Timpson); and, discount retailers (Poundstretcher). We note that Store Twenty One ceased trading from the town centre in 2016, following the national collapse of the business.

4.7.11 The food and drink offer within Whitchurch Town Centre comprises public houses (including Black Bear and Bulls Head); restaurants (including Bauhina, The Railway and Etzio); cafés (including Café Bon Sol); and, hot food takeaways (including Wan Loy, Spicy Delight and Ozan).

4.7.12 The market hall accommodates a market on Friday between 7.30am and 12.30pm and sells a range of convenience and comparison goods. The town centre also accommodates a 'Makers Market' every Saturday on Watergate, where homemade produce is sold.

Accessibility and Pedestrian Flows

4.7.13 Whitchurch Town Centre is highly accessible by public transport. Whitchurch train station is located 500m to the south east of the centre and provides services to Crewe, Cardiff, Carmarthen and Shrewsbury. The town centre also accommodates four bus stops which provide services to Shrewsbury, Wrexham and Nantwich, amongst other destinations.

4.7.14 The town centre benefits from being located less than a mile from the A41. There are seven car parks within the town centre including two large surface car parks for the use of Lidl and Tesco customers.

4.7.15 Watergate Street is the only section of the town centre that is pedestrianised. Most of the remaining areas benefit from wide pavements which aid pedestrian movement.

Physical Environment

4.7.16 The quality of the physical environment in Whitchurch Town Centre is largely positive. Much like other centres within Shropshire, the town centre benefits from a good provision of high-quality public realm alongside some well-maintained historic buildings.

4.7.17 It is worth noting there are two large vacant units on Watergate. Watergate is the only pedestrianised area of the town centre and these vacant units are situated in a prominent location. As such, these two large vacant units are having a detrimental impact on the environment of the town centre. Active uses of these two vacant units should be encouraged to improve the physical environment of the town centre.

4.7.18 The majority of the town centre forms part of a conservation area, and any development proposals will have to be sensitive to this designation. There are approximately 60 listed buildings in the town centre including the Grade I listed Church of Saint Alkmund.

Balance between Independent and Multiple Stores

4.7.19 There is a limited number of national multiple retailers present in Whitchurch Town Centre. These retailers are supported by a good provision of independent retailers which meet the retail needs of the local population.

Evidence of Barrier to Business

4.7.20 There is no obvious evidence of barriers to business within Whitchurch Town Centre. The centre is highly accessible and there is a ready supply of available units which could be repurposed for main town centre uses.

Extent of Evening and Night-time Economy Offer

4.7.21 The evening and night-time economy comprises public houses, bars and restaurants. The majority of these units are located on High Street and Watergate Street.

Summary

4.7.22 Whitchurch Town Centre is performing ok. The town centre benefits from a good provision of comparison and convenience goods retailers alongside a large services sector. The vacancy rate is very similar to the national average. Whitchurch is highly accessible and benefits from being one of the three town centres in Shropshire which accommodates a train station. Much like other centres, the town centre benefits from a high-quality physical environment.

4.8 Market Drayton Town Centre

4.8.1 Market Drayton Town Centre is the smallest town centre within Shropshire, in terms of the number of units. The primary shopping area is located along High Street, Queen Street, Shropshire Street and Chester Street. The centre's key roles include:

- **Convenience retail shopping –** the town centre is served by three foodstores, namely: Morrisons (3,150 sq.m gross), Lidl (1,410 sq.m gross) and Asda (900 sq.m gross). Those foodstores are supported by a number of smaller convenience stores including Iceland and Londis, alongside two bakeries and an off-licence.
- **Comparison retail shopping –** the town centre contains a small selection of national multiple retailers including Argos, Timpson, WHSmith, Boots, Card Factory, Wilko, Homebase and Peacocks.
- **Services –** including a building society (Leek United), three banks (Lloyds, NatWest and Barclays), 13 restaurants/cafés and 21 hairdressers/beauty parlours.
- **Entertainment –** including seven public houses.
- **Community Facilities –** including a tourist information centre, an advice centre, a library and a place of worship.

Diversity of Uses

4.8.2 Market Drayton Town Centre contains a total of 142 retail/service units, with an aggregate floorspace of 30,260 sq.m gross. The diversity of uses present in the town centre in terms of the number and proportion of units and floorspace is set out below in Table 4.8, compared with the Goad national average.

Table 4.8 Diversity of Uses Table for Market Drayton Town Centre

Market Drayton Town Centre – Diversity of uses						
Category	**No. of units**	**% of total units**	**UK (%)**	**Floorspace (sq.m)**	**Floorspace (%)**	**UK (%)**
Comparison (A1)	46	32.4	37.1	13,150	43.5	42.7
Convenience (A1)	14	9.9	10.0	6,940	22.9	18.6
Retail Services (A1)	24	16.9	13.4	1,800	6.0	6.7
Professional Services (A2)	10	7.0	7.6	1,670	5.5	6.2
Food and Drink (A3-A5)	24	16.9	17.9	2,860	9.5	13.2
Miscellaneous	4	2.8	1.2	310	1.0	0.9
Vacant	20	14.1	12.8	3,530	11.7	11.8
Total	**142**	**100**	**100**	**30,260**	**100**	**100**

Source: Stantec survey and Goad Experian (for current national averages)

4.8.3 The proportion of comparison goods retailers (32.4 per cent) is slightly below the national average (37.1 per cent). The proportion of floorspace occupied by comparison goods retailers (43.5 per cent) is similar to the national average (42.7 per cent).

4.8.4 Some 9.9 per cent of units are occupied by convenience goods retailers, which is almost identical to the national average (10.0 per cent). The proportion of floorspace occupied by convenience goods retailers (22.9 per cent) is slightly above the national average (18.6 per cent). This is reflective of Market Drayton accommodating three foodstores (Morrisons, Lidl and Asda) as well as a range of other convenience stores.

4.8.5 The proportions of retail services (16.9 per cent) and associated floorspace (6.0 per cent) are similar to the national averages (13.4 per cent and 6.7 per cent, respectively). This sector comprises hairdressers, beauty salons and travel agents, which are predominantly located on Queen Street and Shropshire Street.

4.8.6 Some 7.0 per cent of units are occupied by professional services, which is in line with the national average (7.6 per cent). The proportion of floorspace occupied by professional services (5.5 per cent) is also only slightly below the national average (6.2 per cent).

4.8.7 The town centre's food and drink provision is similar to the national average in terms of proportion of units, but lower than the national average in terms of proportion of floorspace.

Proportion of Vacant Property

4.8.8 The proportion of vacant units within Market Drayton (14.1 per cent) is slightly above the national average (12.8 per cent). Market Drayton is the only town centre within Shropshire, other than Shrewsbury, to have a unit vacancy rate above the national average. However, the proportion of vacant floorspace (11.7 per cent) is in line with the national average (11.8 per cent).

4.8.9 In total there are 20 vacant units, seven of which are located on Queen Street, three on High Street and three on Cheshire Street. Only three of the vacant units are larger than 200 sq.m, namely: 9 Frogmore Road (1,190 sq.m gross), 4-5 High Street (340 sq.m gross) and 22 High Street (260 sq.m gross).

Retailer Representation

4.8.10 Market Drayton Town Centre contains a very limited range of national multiple retailers including stationers (WHSmith); discount retailers (Wilko); banks (Barclays, NatWest and Lloyds); fashion and footwear operators (Peacocks); opticians (Specsavers); shoe repairers (Timpson); chemists (Boots); greetings card shops (Card Factory); and, catalogue shops (Argos). Over the last few years, the town centre has suffered from the closure of both Poundstretcher and Sports Direct.

4.8.11 Market Drayton accommodates a market within the Indoor Market Hall located on Frogmore Road. The market is held on Wednesday 7.00am to 1.00pm and Saturday 7.00am to 11.45am. Market traders include bakers, butchers, fishmongers, greengrocers, florists and jewellers amongst others.

4.8.12 The food and drink offer within Market Drayton Town Centre comprises public houses (including The Hippodrome, Salopian Star and Joules Brewery); restaurants (including India Garden, Pickles and Jaipur); cafés (including The Hideout, The Little Tea Room and Rumbling Tummies); and, hot food takeaways (including Posh Nosh, Millennium Kebab and Zilan Kebab House).

Accessibility and Pedestrian Flows

4.8.13 Market Drayton Town Centre is not very accessible by public transport. The town centre contains two bus stops which provide services to Shrewsbury and Hanley; however, these services are only available every two hours. The nearest train station is Prees train station located approximately 9 miles to the west of the town centre.

4.8.14 Market Drayton Town Centre is fairly accessible by motor vehicle. The town centre is located on the A529 (Frogmore Road, Smithfield Road and Stafford Street) and approximately 600m from the A53. The town centre also contains eight car parks, including four car parks for customers of Morrisons, Homebase, Lidl and Asda.

4.8.15 The southern section of Queen Street is the only pedestrianised area of the town centre, but most parts within the town centre benefit from wide pavements and therefore pedestrians can move easily through the town centre.

Physical Environment

4.8.16 Similar to other towns within Shropshire, Market Drayton town centre benefits from a high-quality physical environment, largely due to the preservation of historic buildings which provide character to the town centre. However, we note there are some areas in need of improvement and some buildings, most notably the library, appear dated and in need of renovation.

4.8.17 There is a generous provision of street furniture and street planting throughout the town centre. This helps to provide character to the town centre.

4.8.18 The majority of the town centre is located within a conservation area and there are approximately 50 listed buildings within the boundary of the town centre, including the Grade II* listed Tudor House Restaurant, The Old House and Cotton's House.

Balance between Independent and Multiple Stores

4.8.19 Market Drayton accommodates a very limited range of national multiple retailers but, given the relatively small size of the town centre, this is to be expected. The national multiple retailers present in Market Drayton are supported by a range of independent traders which serve the needs of the local population.

Evidence of Barriers to Business

4.8.20 Market Drayton Town Centre is not particularly accessible by public transport as it only benefits from a very limited bus service and it does not have a train station. The centre is also disadvantaged by being the smallest town centre within Shropshire, located close to other large centres outside of Shropshire, including Hanley and Stafford. These higher-order centres provide a stronger retail offering and are likely to be more attractive to customers and potential operators than Market Drayton.

Extent of Evening and Night-time Economy Offer

4.8.21 For a centre the size of Market Drayton, there is a good provision of restaurants, public houses and hot food takeaways, the majority of which are located on Shropshire Street and Stafford Street.

4.8.22 As demonstrated above, there is a healthy night-time economy within Market Drayton that cater for a range of demographics.

Summary

4.8.23 Market Drayton ostensibly appears to be performing relatively well when compared against the Goad national average data, but in our assessment, it is the least healthy town centre within Shropshire. The closure of Poundstretcher and Sports Direct over recent years has represented a significant hit given the very limited range of national multiple retailers present across the town centre.

4.8.24 The physical environment is largely high-quality and has been well maintained. There are some areas, however – most notably the library and the link to Frogmore Road car park from Cheshire Street – that could be improved, and the town centre's vacancy rate is also slightly above the national average.

5 Boundaries

5.1 Justification for Boundaries

5.1.1 The brief for this project required advice on whether there remains suitable justification for defining town centre boundaries, primary shopping areas and primary and secondary frontages within Shropshire's Strategic and Principal Centres.

5.1.2 As set out above, Shrewsbury is Shropshire's only Strategic Centre, with Bridgnorth, Ludlow, Market Drayton, Oswestry and Whitchurch all classified as Principal Centres.

5.1.3 Annex 2: Glossary of the National Planning Policy Framework (NPPF) provides the following definition of a 'town centre':

> *'Area defined on the local authority's policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in the development plan, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.'*

5.1.4 Annex 2 to the NPPF also defines a 'primary shopping area' as a:

> *'Defined area where retail development is concentrated.'*

5.1.5 Under the heading 'Ensuring the vitality of town centres', paragraph 86 of the NPPF provides the following advice:

> *'Local planning authorities should apply a sequential test to planning applications for main town centre uses which are neither in an existing centre nor in accordance with an up-to-date plan. Main town centre uses should be located in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered.'*

5.1.6 Paragraph 89 of the NPPF further advises that:

> *'When assessing applications for retail and leisure development outside town centres, which are not in accordance with an up-to-date plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500m2 of gross floorspace). This should include assessment of:*
>
> *a) the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and*
>
> *b) the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme).'*

5.1.7 Annex 2 to the NPPF defines 'edge-of-centre' as follows:

> *'For retail purposes, a location that is well connected to, and up to 300 metres from, the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances.*

5.1.8 In our professional opinion, we consider it appropriate for all centres to have a town centre boundary and for larger centres to also have a primary shopping area. Without a defined primary shopping area (where appropriate) it will be more difficult to ensure that edge-of-centre, out-of-centre and out-of-town retail and leisure proposals are required to address the sequential and impact tests (where necessary). Defining these boundaries provides some protection to centres and means that, typically, the sequential and impact tests have to be passed before planning permission can be granted for retail and leisure proposals not within town centres (subject to conformity with relevant development plan policies and the weight given to any other material considerations). The lack of defined boundaries would therefore go against the 'town centres first' approach which is fundamental to *Section 7: Ensuring the Vitality of Town Centres* of the NPPF.

5.1.9 For larger centres, it makes sense to define and protect a core area where retail uses are concentrated.

5.1.10 The reason why we consider that smaller centres should not have a primary shopping area is because it can be hard to define an area in smaller centres where retail uses are concentrated.

5.1.11 Primary and secondary frontages are not defined in the NPPF. On this basis, we no longer consider it appropriate for local authorities to break down primary shopping areas within their centres into areas of primary and secondary frontages.

5.1.12 Based on the above, we consider it justifiable for Shropshire's Strategic and Principal Centres to all have a defined town centre boundary and for the larger centres to also have a primary shopping area.

5.1.13 Our proposed town centre boundaries and primary shopping areas (where appropriate) are set out in **Appendix A**.

5.2 Proposed Boundaries

5.2.1 The current boundaries for the six town centres in Shropshire are set out in the Council's Policies Map 2015. We recommend the following changes to the existing boundaries, based on our recent visits to each centre:

- **Shrewsbury**: The existing town centre boundary should be maintained in the main but should be extended to the east to include main town centre uses along St Mary's Street and Dogpole. We recommend the inclusion of a primary shopping area around the Darwin Shopping Centre, the Pride Hill Centre, and Pride Hill (i.e. the retail core of the town centre). We recommend that the existing secondary shopping area is removed, as secondary frontages are no longer defined in the NPPF.
- **Oswestry**: The existing town centre boundary appears to be justified, but we recommend the inclusion of the Sainsbury's foodstore, as a key anchor within the town centre. We do not consider that a defined primary shopping area is justified in Oswestry due to the lack of a significant retail core and for the reasons given above, the currently defined secondary shopping area within the town centre should be removed.
- **Ludlow**: There has been no significant expansion or contraction of the town centre and on this basis, the existing town boundary continues to be justified. The lack of a retail core means that a primary shopping area should not be defined in Ludlow.
- **Bridgnorth**: In our professional opinion, the existing town centre boundary within Bridgnorth is too large and fragmented. On this basis, we recommend removing part of the existing town centre boundary immediately either side of the River Severn. As with the other centres (other than Shrewsbury), there is a lack of a retail core within Bridgnorth and there is no justification for the inclusion of a primary shopping area.
- **Whitchurch**: There has been no significant expansion or contraction of the town centre and on this basis, the existing town boundary continues to be justified. The lack of a retail core means that a primary shopping area should not be defined in Whitchurch.
- **Market Drayton**: Generally speaking, the existing town centre boundary appears to be justified, albeit we recommend that the town centre boundary is contracted slightly, as it currently extends too far along Shropshire Street. There is a lack of a retail core within Market Drayton and thus, no justification for the inclusion of a primary shopping area.

6 Policy Recommendations

6.1 Shrewsbury Town Centre

6.1.1 In January 2018, Shropshire Council purchased the three shopping centres within Shrewsbury Town Centre from UK Commercial Property Trust at a combined cost of £51m, these being:

- Darwin Shopping Centre;
- Pride Hill Centre; and
- The Strand Riverside Mall.

6.1.2 The objective of purchasing the shopping centres within Shrewsbury Town Centre was to allow the Council to have the opportunity to shape the redevelopment of significant parts of the town centre, drive economic growth, improve town centre health, improve areas of the centre in need of regeneration, increase the Council's income, make the town centre more of a 'destination' and to provide jobs.

6.1.3 As set out in Section 4, Shrewsbury Town Centre contains 568 retail and leisure units, with an aggregate floorspace of 97,780 sq.m gross. There are 80 vacant units in the town centre, which represents 14.1 per cent of the total units, compared with the national average of 12.8 per cent. In terms of floorspace, some 17,100 sq.m (gross) is vacant across the town centre, which represents 17.5 per cent of the total floorspace, also above the national average of 11.8 per cent. Clearly, there is too much retail floorspace within the town centre and this issue is only going to be exacerbated following the global pandemic, which is likely to lead to more retail failures and the need for less physical retail floorspace. As such, it appears that three shopping centres dedicated to retail within Shrewsbury Town Centre is excessive.

6.1.4 Of the three shopping centres within the town centre, Darwin Shopping Centre is the largest and is the best-performing, being close to fully occupied and containing some strong mid-to high-end retailers. The Darwin Shopping Centre is also in a prime location, in the middle of the town centre along Pride Hill. Whilst the Pride Hill Centre is also in a prime location along Pride Hill, it contains some prominent vacancies and is occupied by low- to mid-market retailers. The Strand Riverside Mall, which is located in a peripheral location to the north of the town centre, also contains some prominent vacancies and low-end retailers as well as some uses which do not necessarily have to be located within a town centre shopping centre. Furthermore, the Strand Riverside Mall is adjacent to a run-down, under-used multi-storey car park.

6.1.5 Based on the above, we make the following policy recommendations:

Darwin Shopping Centre: it is recommended that the Darwin Shopping Centre should remain as a retail destination.

Pride Hill Centre: it is recommended that the Pride Hill Centre should be re-purposed into a commercial leisure-led centre, that could include a cinema and food & beverage uses.

The Strand Riverside Mall: it is recommended that the Strand Riverside Mall and adjacent multi-storey car park should both be demolished, creating a large town centre development site. It is recommended that the Council should provide a framework for the site, setting out design parameters and broad uses for the site, as well as a strategy to assist in finding a delivery partner for the site. A potential mix of uses for the site could include some of the following uses:

- Residential – making the most of the river location, with the potential for 400-500 units.
- Offices – either public or private sector.
- Hotel.
- Educational uses.
- Car parking – up to 450 car parking spaces.

6.2 Locally Set Impact Threshold

6.2.1 The PPG states that the impact test only applies to proposals exceeding 2,500 sq.m gross of floorspace unless a different locally appropriate threshold is set by the local planning authority. In setting a locally appropriate threshold it will be important to consider the:

- scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- impact on any other planned investment.

6.2.2 As a guiding principle, impact should be assessed on a like-for-like basis in respect of that particular sector (for example, it may not be appropriate to compare the impact of an out of centre DIY store with small scale town-centre stores as they would normally not compete directly). Retail uses tend to compete with their most comparable competitive facilities. Conditions may be attached to appropriately control the impact of a particular use.

6.2.3 Policy MD10b: Town and Rural Centre Impact Assessments of the Shropshire Council Site Allocations and Management of Development (SAMDev) Plan (adopted 2015) states that to ensure development does not cause significant adverse impacts on the vitality and vibrancy of Shropshire's town and rural centres, applicants will be required to prepare Impact Assessments for new retail, leisure and office proposals where they:

a. Are located outside a defined town centre, or are more than 300 meters from a locally recognised high street or village centre; and

b. Are not in accordance with the area's settlement strategy; and

c. Have a gross floorspace above the following thresholds:

   - Shrewsbury – 500 sq. m;

   - Principal Centres (identified in CS15, i.e. Oswestry, Whitchurch, Market Drayton, Ludlow and Bridgnorth) – 300 sq. m;

6.2.4 The Council will not permit proposals which have a significant adverse impact on town centres, or where it is considered the scope of the Impact Assessment is insufficient.

6.2.5 As set out in Section 4, Shrewsbury Town Centre is currently performing very well and the other five town centres are either performing very well (Ludlow), well (Oswestry, Bridgnorth and Market Drayton) or reasonably well (Whitchurch). Whilst the town centres are generally in good health, all are vulnerable to the impacts of Covid-19 on the high street, which is highly likely to lead to the accelerated decline of traditional retailing within town centres. We are not aware of any major retail commitments in or near to any of the town centres. There is significant investment planned in Shrewsbury Town Centre, but this is mainly reducing the amount of retail floorspace within the town centre, by consolidating/redeveloping the shopping centres. The existing locally set floorspace impact thresholds are already low and taking into account the above factors, we consider that there is no scope to increase the floorspace thresholds and as such, they should be kept the same. In line with Paragraph 89 of the NPPF, impact assessments should only be required for retail and leisure development outside town centres and not office proposals as per the current local planning policy.

7 Summary of Findings, and Recommendations

7.1 Introduction

7.1.1 In this concluding section we summarise the findings of this study and set out our recommendations for the formulation of future planning policy within Shropshire. We provide recommendations in terms of qualitative retail need and meeting these needs in a manner that will support the vitality and viability of Shropshire's town centres.

7.2 The Performance of Shropshire's Town Centres

7.2.1 In Section 4 of this report we considered the performance of the six town centres in Shropshire in terms of the indicators of vitality and viability set out within national Planning Policy Guidance. We summarise are findings in respect of the individual centres below.

Shrewsbury

7.2.2 Shrewsbury Town Centre is performing very well. There is a good provision of comparison goods retailers including a large number of national multiples. Whilst there is a slight under-provision of convenience goods retailers, those that are present are supported by large out-of-centre foodstores. The town centre benefits from an historic setting which has been sensitively preserved, supported by the conservation area designation and a large number of listed buildings.

7.2.3 The town centre is highly accessible and has good public transport links including a train station in an edge-of-centre location and a bus station within the centre. This helps the centre to maintain its status as a strategic centre at the top of the retail centre hierarchy in Shropshire.

Oswestry

7.2.4 Oswestry Town Centre is performing well. The proportion of comparison and convenience goods retailers and services present in the town centre is similar to the respective national averages, and the vacancy rate is below the national average.

7.2.5 The town centre accommodates a good mix of national multiple and independent retailers and is accessible by motor vehicle but does not benefit from a train station. The town centre also benefits from a high-quality physical environment.

7.2.6 The performance of the town centre is largely similar to when it was last surveyed in 2008; however, the vacancy rate has improved significantly, which is a positive indicator of town centre health.

Ludlow

7.2.7 Ludlow Town Centre is performing very well. The proportion of comparison goods retailers – a key barometer of the strength of a centre – is above the UK average, and the proportion of convenience goods retailers is similar to the national average. The vacancy rate is also close to the national average, albeit the unit vacancy rate has increased in recent years and therefore careful monitoring and management is recommended.

7.2.8 Ludlow Town Centre benefits from a very attractive physical environment and a large number of upmarket independent retailers, which provides a unique offering. Ludlow is also highly accessible by a range of modes of transport.

Bridgnorth

7.2.9 Overall, our assessment is that Bridgnorth Town Centre is performing relatively well. The proportion of comparison goods retailers is much higher than the national average, and the proportion of convenience goods retailers is similar to the national average. The vacancy rate in Bridgnorth Town Centre is much lower than the UK average, which is a positive sign of town centre viability, and the town centre benefits from a very positive physical environment which is well maintained.

Whitchurch

7.2.10 Whitchurch Town Centre is performing reasonably well. The town centre benefits from a good provision of comparison and convenience goods retailers alongside a large services sector. The vacancy rate is very similar to the national average. Whitchurch is highly accessible and benefits from being one of the three town centres in Shropshire which accommodates a train station. Much like other centres, the town centre benefits from a high-quality physical environment.

Market Drayton

7.2.11 Market Drayton ostensibly appears to be performing relatively well when compared against the Goad national average data, but in our assessment it is the least healthy town centre within Shropshire. The closure of Poundstretcher and Sports Direct over recent years has represented a significant hit given the very limited range of national multiple retailers present across the town centre.

7.2.12 The physical environment is largely high-quality and has been well maintained. There are some areas, however – most notably the library and the link to Frogmore Road car park from Cheshire Street – that could be improved, and the town centre's vacancy rate is also slightly above the national average.

7.3 Town Centre Boundaries

7.3.1 Based on the above, we consider it justifiable for Shropshire's Strategic and Principal Centres to all have a defined town centre boundary and for the larger centres to also have a primary shopping area.

7.3.2 We have reviewed the existing town centre boundaries and primary shopping areas (where applicable) for the six town centres and our recommendations are provided within Appendix A. The proposed boundaries are based on the definitions of primary shopping areas/town centre boundaries within Annex 2: Glossary of the NPPF and proposed amendments are based on our professional judgement.

7.4 Meeting Needs and Other Recommendations

7.4.1 As set out above, in January 2018, Shropshire Council purchased the three shopping centres within Shrewsbury Town Centre, these being:

- Darwin Shopping Centre;
- Pride Hill Centre; and
- The Strand Riverside Mall.

7.4.2 Whilst Shrewsbury Town Centre is the main focus for retailing within Shropshire, in our view there is an over provision of retail floorspace within the town centre currently. The purchase of the three shopping centres in the town centre provides the Council with an opportunity to shape the re-development of significant parts of the town centre, drive economic growth, improve town centre health, improve areas of the centre in need of regeneration, increase the Council's income, make the town centre more of a 'destination' and to provide jobs.

7.4.3 Darwin Shopping Centre is in a prime location and is the largest and is the best-performing out of the three shopping centres, and therefore we recommend that Darwin Shopping Centre remains a retail destination.

7.4.4 Whilst the Pride Hill Centre is also in a prime location along Pride Hill, it contains some prominent vacancies and is occupied by low- to mid-market retailers. We recommend that the Pride Hill Centre should be re-purposed into a commercial leisure-led centre, that could include a cinema and food & beverage uses. The Strand Riverside Mall, which is located in a peripheral location to the north of the town centre, also contains some prominent vacancies and low-end retailers as well as some uses which do not necessarily have to be located within a town centre shopping centre. Furthermore, the Strand Riverside Mall is adjacent to a run-down, under-used multi-storey car park. We recommend that The Strand Riverside Mall is demolished, creating a large town centre development site. We recommend that the Council provides a framework for the site, setting out design parameters and broad uses for the site, as well as a strategy to assist in finding a delivery partner for the site

7.4.5 Oswestry, Ludlow, Bridgnorth, Whitchurch and Market Drayton are generally performing well and above average when compared against many of the key performance indicators of health. Shropshire Council should seek to ensure that the town centres continue to provide day-to-day retail and service facilities to its residents, whilst supporting independent operators through a difficult period in the town centre and retail sector (where possible). If retailers leave the town centres, particularly national multiples, they are unlikely to be replaced with other retailers (particularly in terms of national multiples), meaning the offer in the town centres will likely need to be diversified. In our view, Whitchurch appears to be the most vulnerable town and is performing least well out of the study centres. The performance of this centre should be carefully monitored and interventions and investment sought (where possible), such as the Towns Fund.

7.4.6 Whilst the town centres within Shropshire are generally performing well, the greatest challenge will be to maintain their existing performance levels as the economy starts to recover following the aftermath of the global pandemic. There will likely be further casualties in the retail and leisure sector, both independents and national multiples, and the Council will need to do all it can to support town centre businesses through this extremely challenging period.

7.5 Local Impact Floorspace Threshold

7.5.1 When assessing applications for retail and leisure development outside town centres, which are not in accordance with an up-to-date plan, we consider that the Council should adopt the following locally set floorspace thresholds for requiring an impact assessment:

- Shrewsbury – 500 sq. m gross floorspace; and
- Oswestry, Whitchurch, Market Drayton, Ludlow and Bridgnorth) – 300 sq. m gross floorspace.

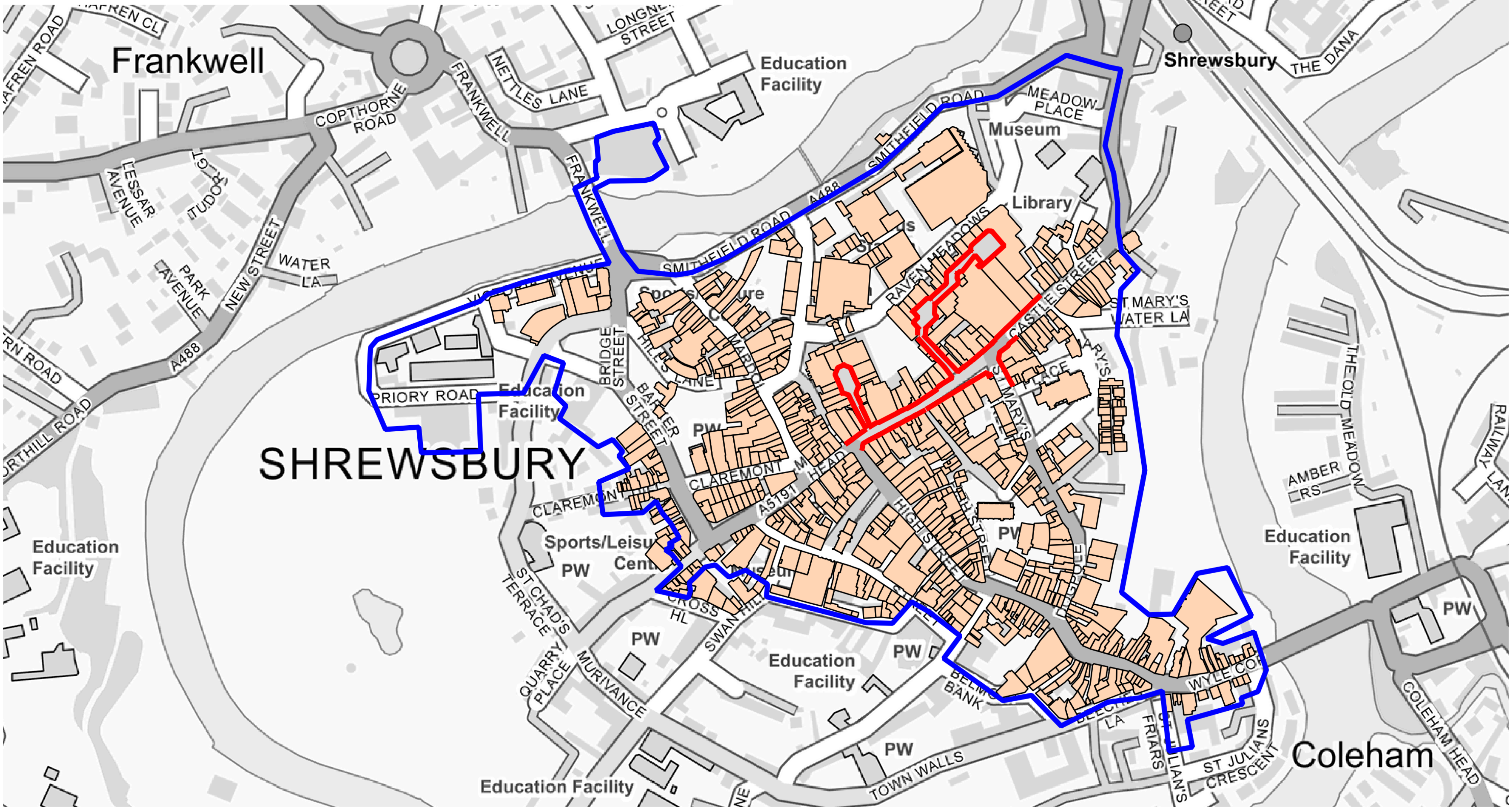
7.6 Monitoring and Review

7.6.1 We recommend that the Council maintain an up-to-date picture of the performance of the six defined town centres and any qualitative retail needs by continuing to review the composition of the centres, vacancy rates and environmental quality. The global pandemic has changed short term spending patterns, which may have long term implications for town centres and the health of the six town centres will change post global pandemic.

7.6.2 Any sustained and significant changes in any of the key indicators should trigger a review and update of this assessment to ensure that the Council is meeting objectively assessed retail needs, encouraging sustainable shopping patterns and implementing the most appropriate strategy to support the vitality and viability of the six town centres in Shropshire.

Appendix A Proposed Centre Boundaries

Shrewsbury Town Centre



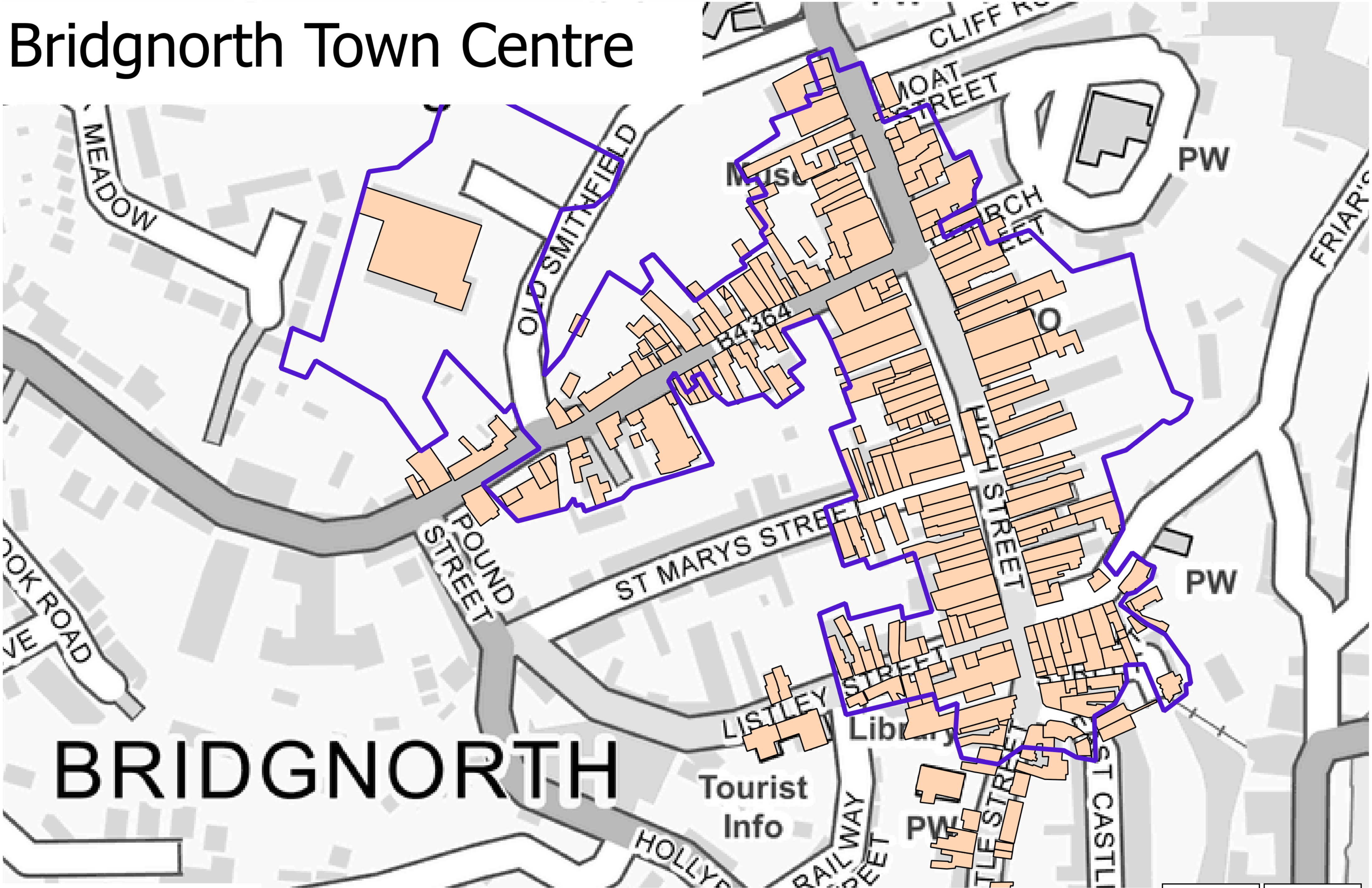
Legend

- Town Centre Boundary
- Primary Shopping Area

100 0 100 200 300 400 m

Scale @ A4 1:5000

Bridgnorth Town Centre



Legend

Town Centre Boundary

50 0 50 100 150 200 m

Scale @A4 1:2500

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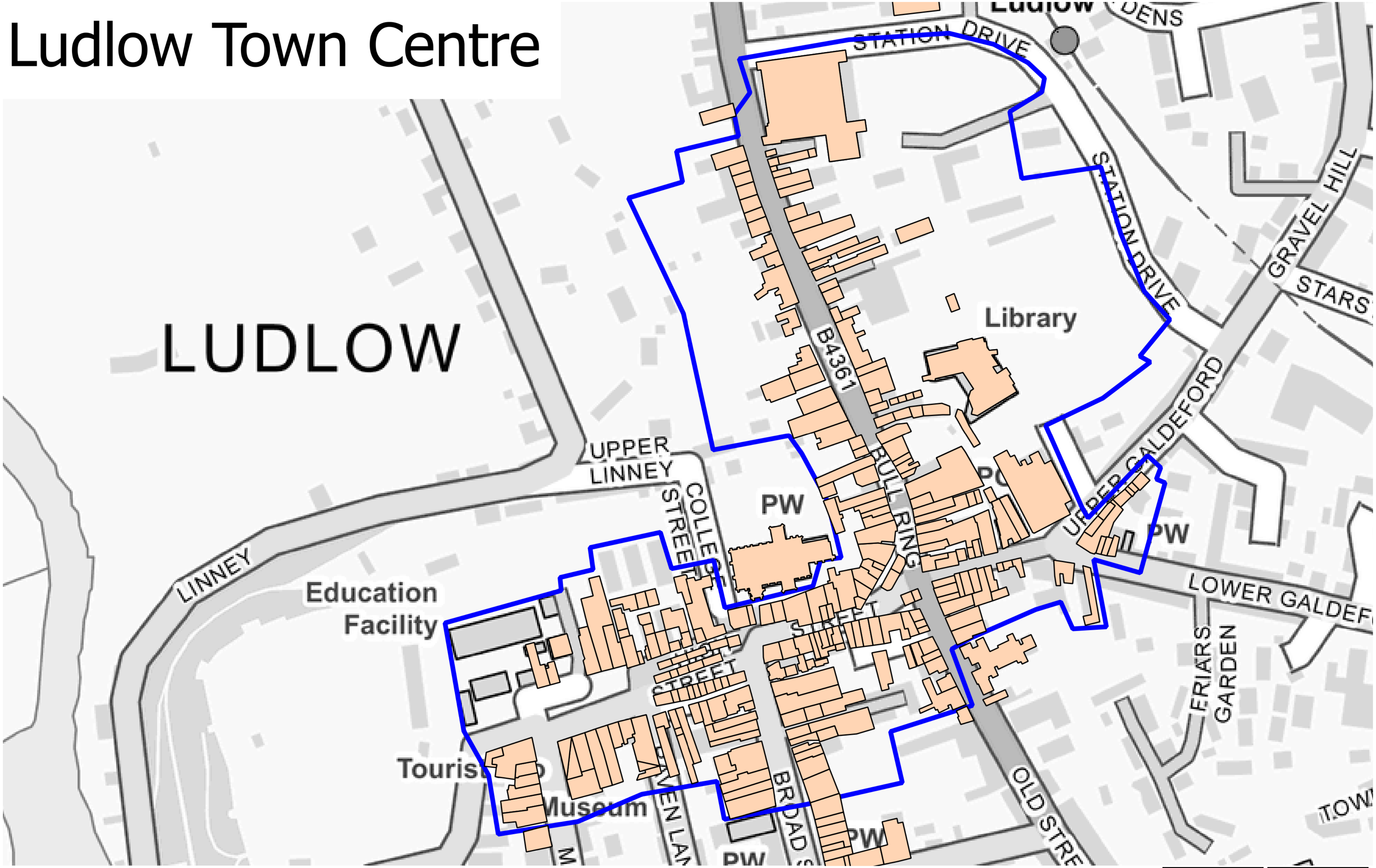
Ludlow Town Centre



Legend

Town Centre Boundary

75 0 75 150 225 300 m

Scale @ A4 1:3000

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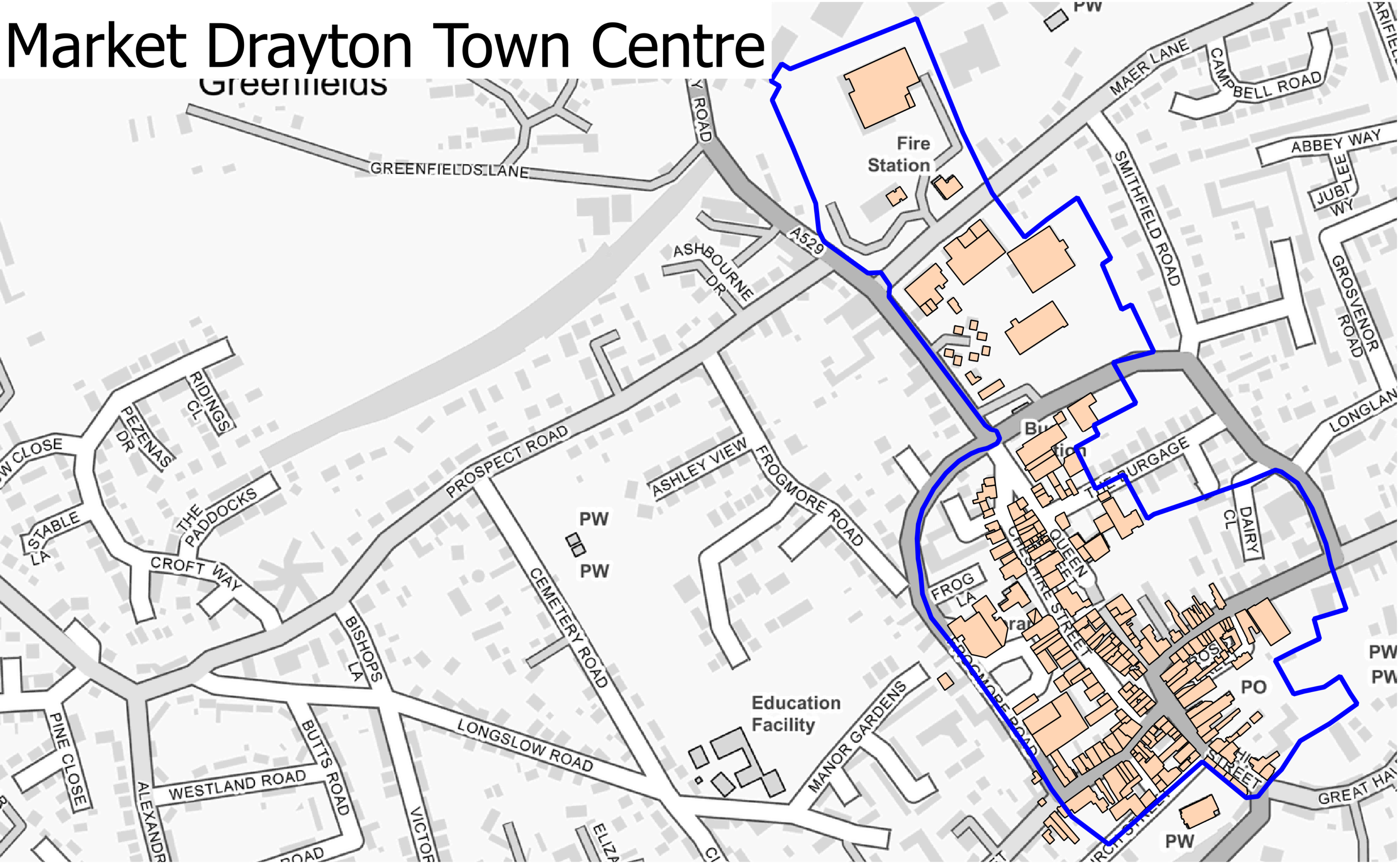
Market Drayton Town Centre



Legend

Town Centre Boundary

100 0 100 200 300 400 m

Scale @ A4 1:4500

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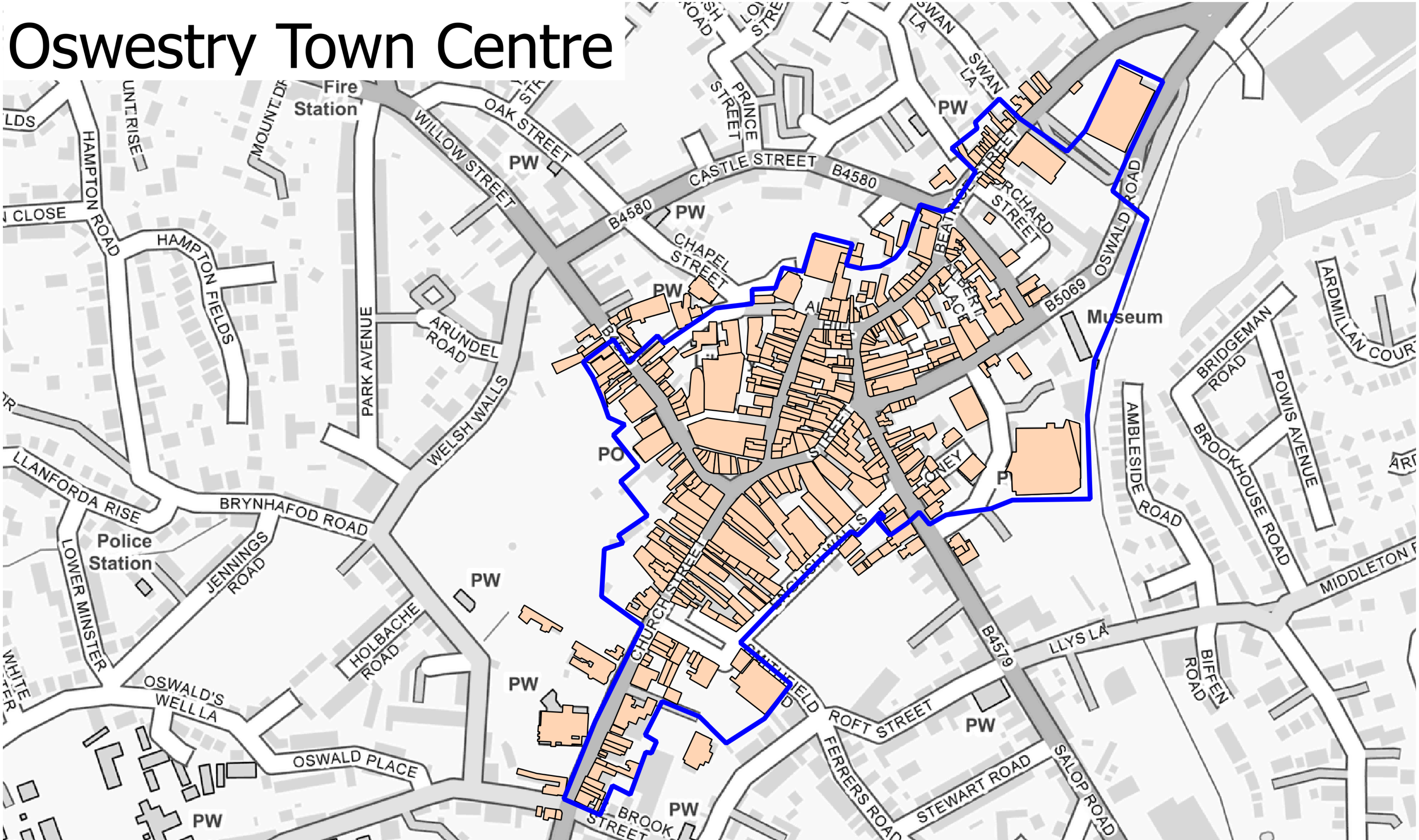
Oswestry Town Centre



100 0 100 200 300 400 m

Scale @ A4 1:4500

Legend

Town Centre Boundary

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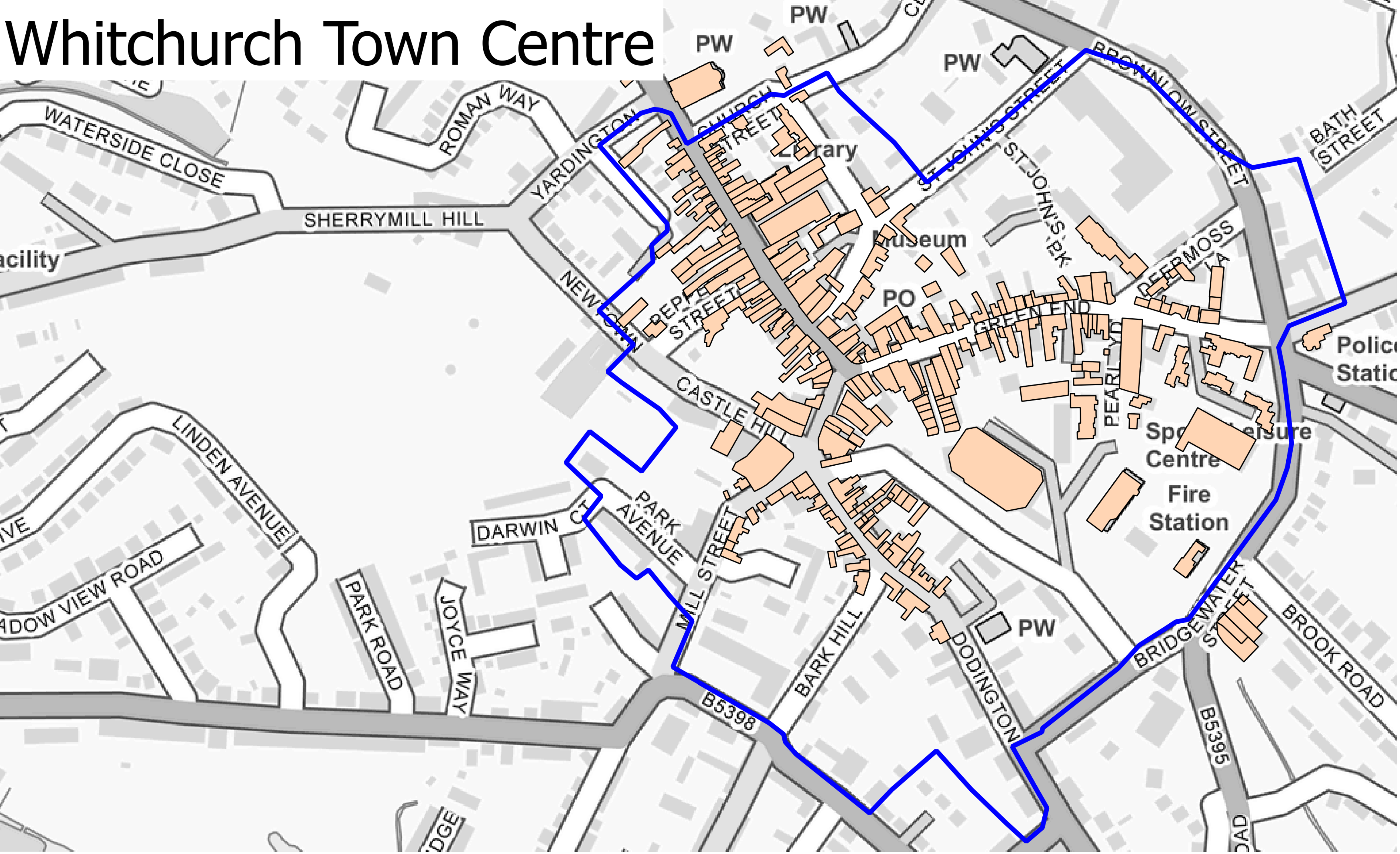
Whitchurch Town Centre



Legend

Town Centre Boundary

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Scale @ A4 1:3500