

Shifnal: Town Centre Audit Analysis, 2023



Shropshire
Council

Published November 2023

For more information, please contact:

BusinessIntelligence@shropshire.gov.uk

Introduction

An audit of businesses operating in Shifnal's main shopping streets was undertaken in September 2023 as part of an on-going piece of research reviewing the vibrancy of Shropshire's main market towns and key settlements. Shifnal centre was first audited in May 2019 and then again in September 2020, 2021 and 2022. The objective of these audits is to provide a snapshot of the vitality of the town by investigating:

- The range and diversity of the retail offer
- The number and types of non-retail businesses operating
- The number and location of vacant properties
- Distinctive characteristics within the town, for example a strong tourism offer or a high penetration of "low end" traders
- The amount, location and type of domestic residences in the centre of the town

The research also aims to monitor change over time. The functionality of the High Street has been changing for some time, and through 2020 and 2021 the coronavirus pandemic has posed additional challenges to High Street businesses. The 2020 audits for all towns took place in September, following the first national lockdown. Non-essential retail and hospitality businesses were able to trade at this time (albeit with strict social distancing measures in place). The 2021 audits also took place when High Street businesses were able to trade. By 2022 High Streets were trading normally with no Covid-19 restrictions, but the cost of living crisis was gathering pace. Inflation was elevated in 2023, which has also impacted people's spending power.

Key Findings

- 100 commercial units, occupying 8,800m² gross floor space
- Seventh largest centre in Shropshire accounting for 3.9% of all Shropshire High Street traders
- Low number of stores per head of population at a rate of 10 units per 1,000 population (13 on average for Shropshire)
- Average store size 88m² which is the smallest across all settlements audited (147m² on average for Shropshire)
- 88 residential premises in the main shopping area, giving a ratio of 1.3:1 commercial versus residential properties
- Shifnal had a 9% business churn rate between the 2022 and 2023 audits. This is slightly lower than in the preceding two years and considerably lower than in 2020 (21%). It also lower than the Shropshire average (12% churn in 2023).
- 10% of all commercial premises were vacant in 2023, which is slightly lower than the average across Shropshire (11%)
- The highest proportion of commercial units is attributable to retail services; at 27% of units this is higher than in any other town except Albrighton and Highley
- Restaurants and takeaways also slightly over represented (15%)
- In contrast, there are comparatively few businesses operating in comparison or convenience retail (18% compared with 28% for Shropshire)

Methodology Statement

Only the main retail centre of the town was surveyed, as shown on Map 4.

Both retail and non-retail businesses will be operating in other parts of the town.

All commercial premises within the defined area were audited, and classified as:

- Comparison Retail—defined as stores selling non-food/drink/tobacco products
- Convenience Retail—defined as stores selling food/drink/tobacco products
- Retail Service— defined as stores selling a service rather than a product, such as hair dressers or travel agents
- Financial & Business Services — for example, banks, solicitors, accountants, estate agents
- Health - including dentists, health centres, GP practices, alternative therapies
- Restaurants & Takeaways—including cafés and tea rooms
- Tourism & Leisure—hotels and public houses/bars as well as visitor attractions and cultural assets
- Education & Community Facilities—including schools, colleges, libraries, community centres
- Other Non-Retail
- Vacant

Gross floor space was matched to each premise using OS Master Map. It should be noted, that where two outlets shared the same premise (as shown on Master Map) an assumption was made that both occupied the same amount of floor space. For multi-storey buildings occupied by multiple businesses, it is assumed that all floors have the same gross space. Unless it is clear that a single business occupies more than one floor of a building, it has been assumed that it occupies only one floor. This means that in some cases, gross floor space may be under-estimated as some traders use upper floors for storage. No estimate relating to net floor space has been made.

Businesses occupying above ground floor level premises have only been included in this audit if their presence is clear from street level (by door signs or external hoardings for example). It is likely, therefore, that some non-consumer businesses operating in the area may have been missed.

Premises are assumed to have changed hands if their name or function has changed since the 2022 audit. In some cases though, ownership may be unchanged but the business has been rebranded or renamed.

An estimate of the number of domestic residences in the main retail centre has been made using OS Address Base (complete version) using all residential classification codes.

Retail Centre Hierarchy

Town centres represent important employment, entertainment and shopping hubs for their local population and hinterland. They also represent an important component of the visitor economy.

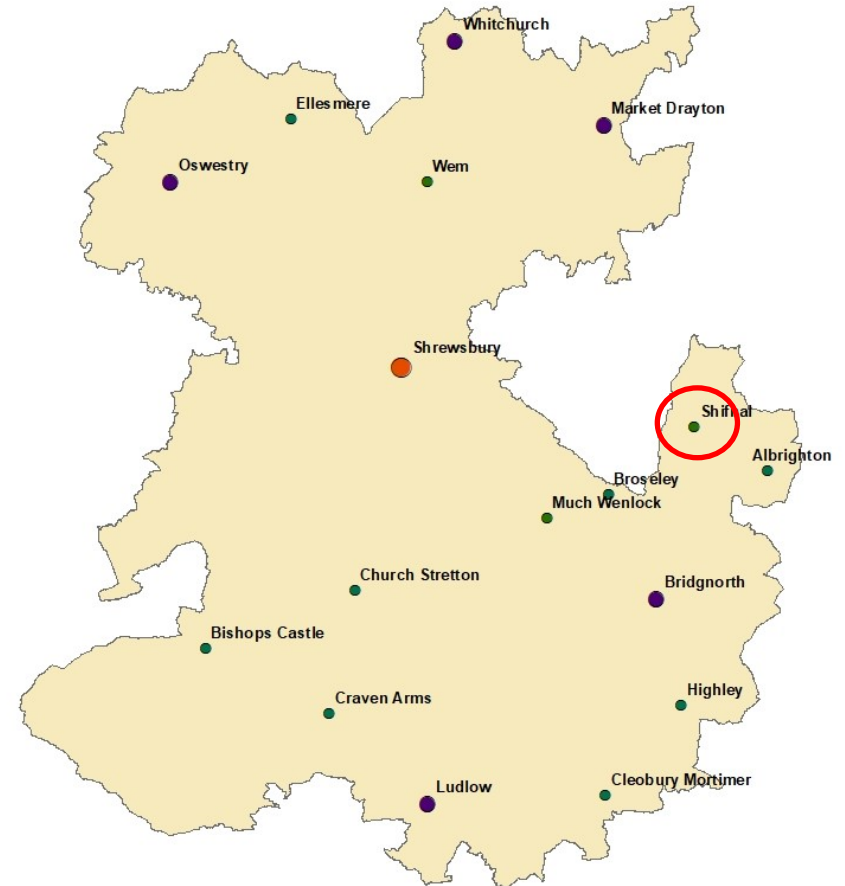
However, not all centres have comparable functions. Larger centres tend to attract workers and shoppers from much further afield than smaller centres, and consequently offer a much greater volume and variety of retail trade and consumer and business services.

In order to benchmark Shropshire towns against each other in an appropriate manner, the following hierarchy has been adopted:

- Tier 1: Shrewsbury
- Tier 2: Bridgnorth
Ludlow
Oswestry
Market Drayton
Whitchurch
- Tier 3: Albrighton
Bishops Castle
Broseley
Church Stretton
Cleobury Mortimer
Craven Arms
Ellesmere
Highley
Much Wenlock
Shifnal
Wem

Shifnal has more commercial operators within its main shopping streets than any other tier 3 Shropshire town but is of a similar size to Wem and Ellesmere.

Map 1: Shropshire's Main Retail Centres



About Shifnal

Shifnal is a small market town located in the east of Shropshire. The town, once known as Idsall, dates back to the 7th Century. Today it has a population of 9,725 and 4,231 households (*2021 Census*). It is the fastest growing town in Shropshire, its population having risen by 43.5% since 2011. It is the seventh largest market town in the county.

Shifnal is well served with transport links. The only motorway directly serving Shropshire (the M54) is easily accessible, with J4 for Telford only two miles away and Junction 3 for Cosford 3.5 miles away. This provides easy access to the Black Country, the West Midlands conurbation and the M5 and M6. The I54 development, which is home to major manufacturers Jaguar Land Rover, Eurofins and Moog Aerospace, is within a 15 mile commute. The nearby A41 provides direct links north to Newport (9 miles), Whitchurch and Cheshire. Southbound, the A41 links to Wolverhampton (13 miles). Eastwards from Shifnal, the A5 provides access to Stafford and Cannock.

The town is on the main railway line between Shrewsbury and Birmingham.

The total population within a 10 mile radius is approximately 290,500.

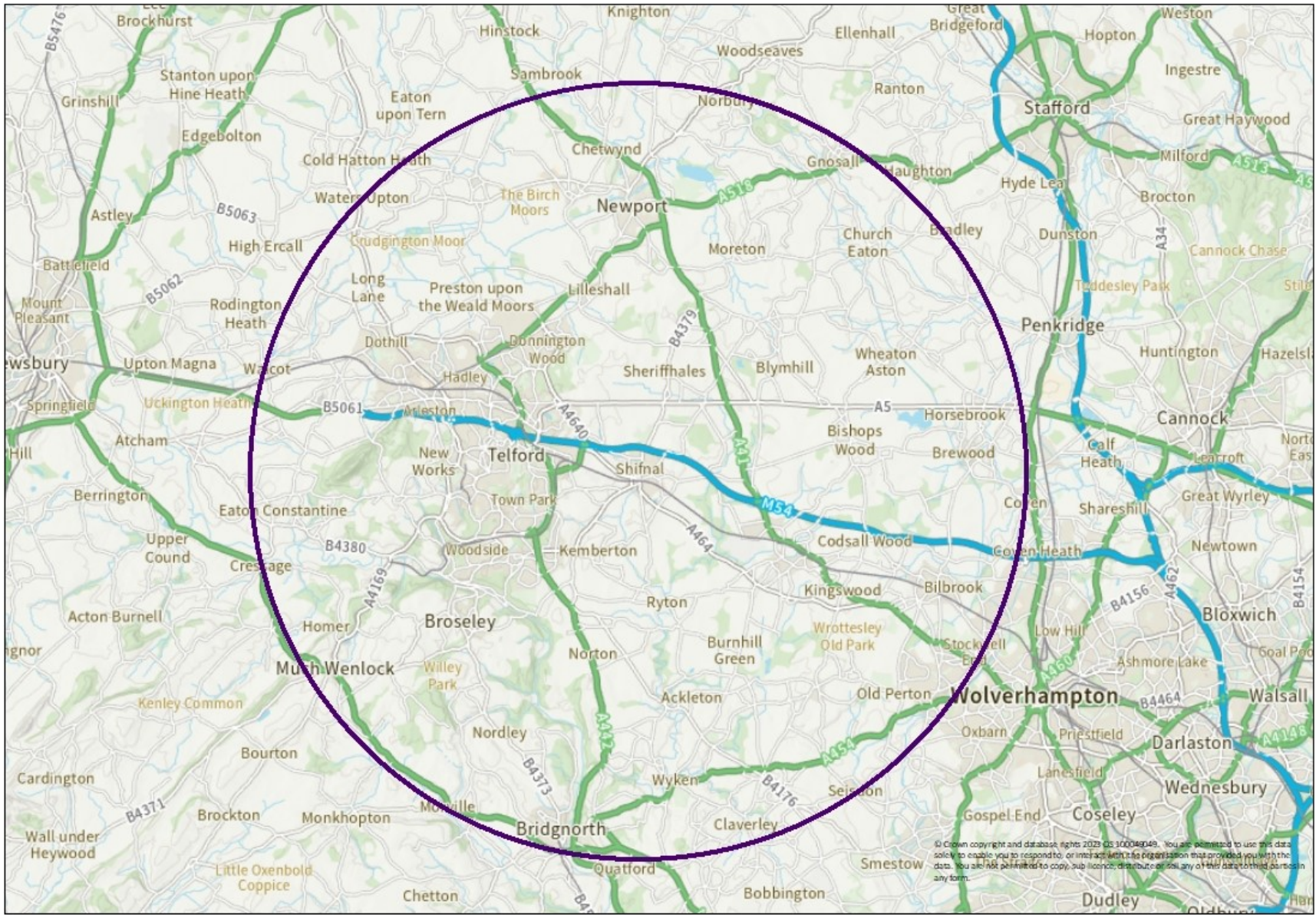
Shifnal provides approximately 2,900 jobs across the town council area (*ONS Business Register and Employment Survey, 2022*). The town's strong transport links to main employment centres in the West Midlands means that a significant number of local residents commute out. Notwithstanding this, as the town's population has grown, the number of local employment opportunities has also risen. Key sectors include:

- Arts, Entertainment & Recreation (19.3% of jobs)
- Education (14.9% of jobs)
- Accommodation & Food Services (14.9% of jobs)
- Professional, Scientific & Technical (9.6% of jobs)
- Construction (8.1% of jobs)

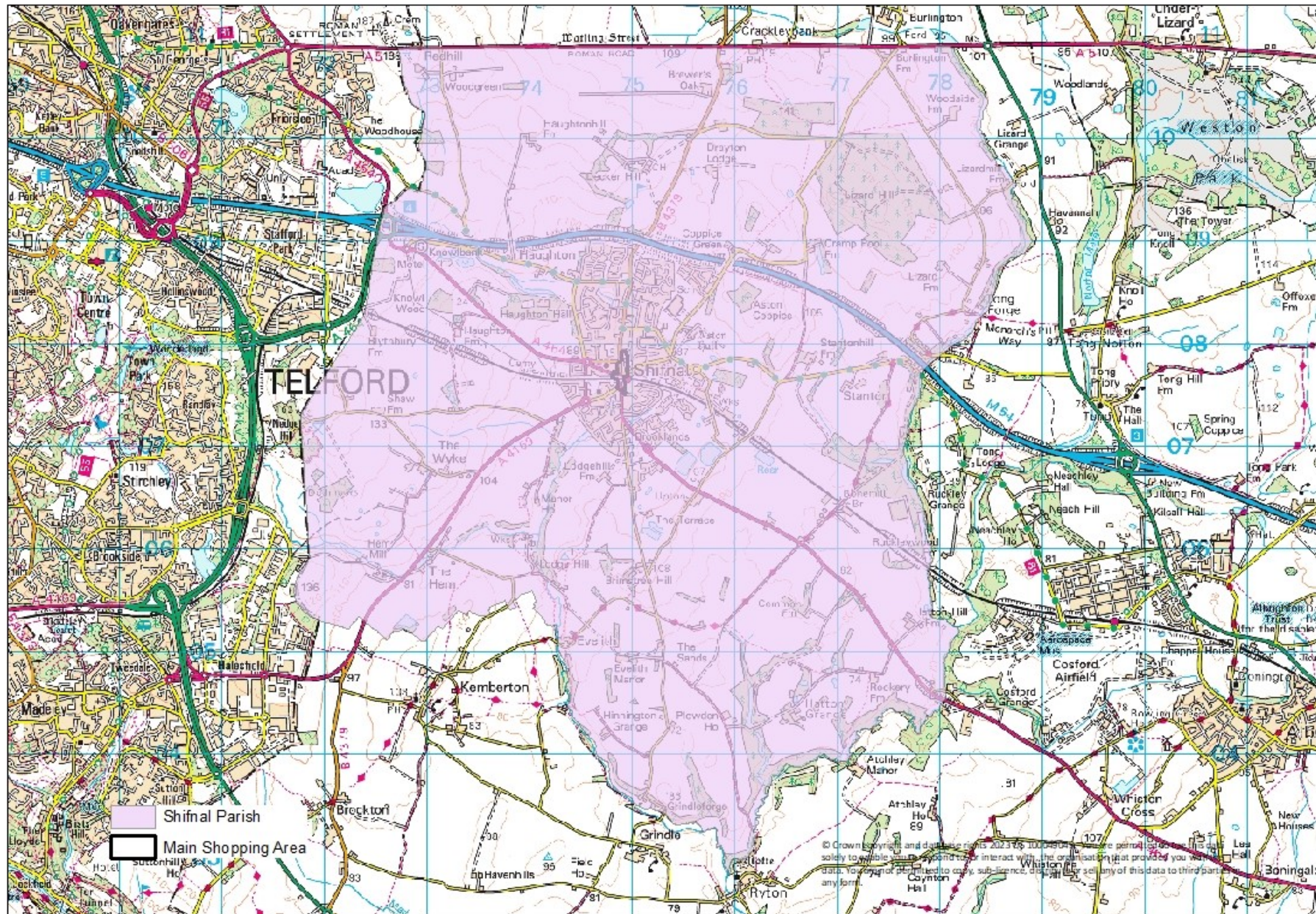
Overall, Shifnal town council area (depicted on Map 3) covers an area of 3,864 hectares. The main shopping area (depicted on Map 4) is much smaller than this, at around 3 hectares.

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

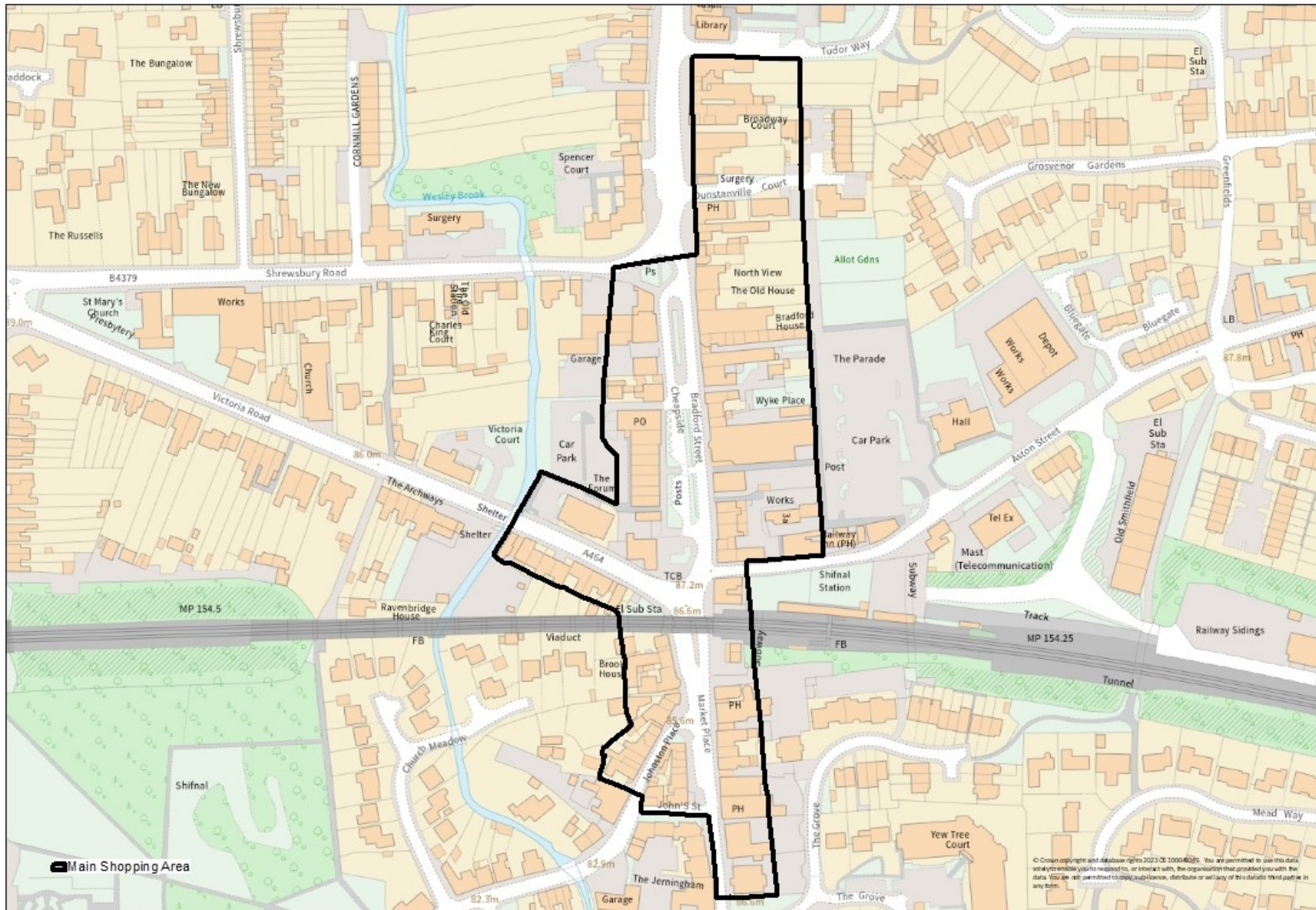
Map 2: Location of Shifnal showing 10 mile radius



Map 3: Shifnal Town Council Area



Map 4: Main Retail Shopping Area



Alternative Shopping Destinations

Shifnal primarily services its own local population, the postcode district TF11. However, residents in this postcode are frequent visitors to other nearby shopping centres which offer a greater choice of comparison retail and more leisure and hospitality opportunities. The charts below show the proportion of the TF11 postcode district which visited Telford, Shrewsbury and Bridgnorth in each month between April 2020 and February 2022. Telford is just a short distance from Shifnal, and Bridgnorth is likewise within a 10 mile radius, with Shrewsbury slightly further afield (see map 2). It is clear that a very high proportion use nearby Telford which is easily accessible via the M54. 62.7% of the TF11 population had visited Telford at least once in February 2022. In the same month, 13.9% had visited Shrewsbury, which is also easily accessible via the M54 and A5. As the following charts show, the proportion of the TF11 population visiting Telford or Shrewsbury fluctuates on a monthly basis, but less so for the former, for which Shifnal is part of the core catchment. Visits to Telford dipped at the beginning of 2021 when the country was in lockdown but subsequently the trend has been upwards. The proximity of Telford and frequency of visits mean that a significant amount of Shifnal retail expenditure is leaked out of Shropshire local authority area.

Chart 1: Telford

Postcode Conversion Trend (%)

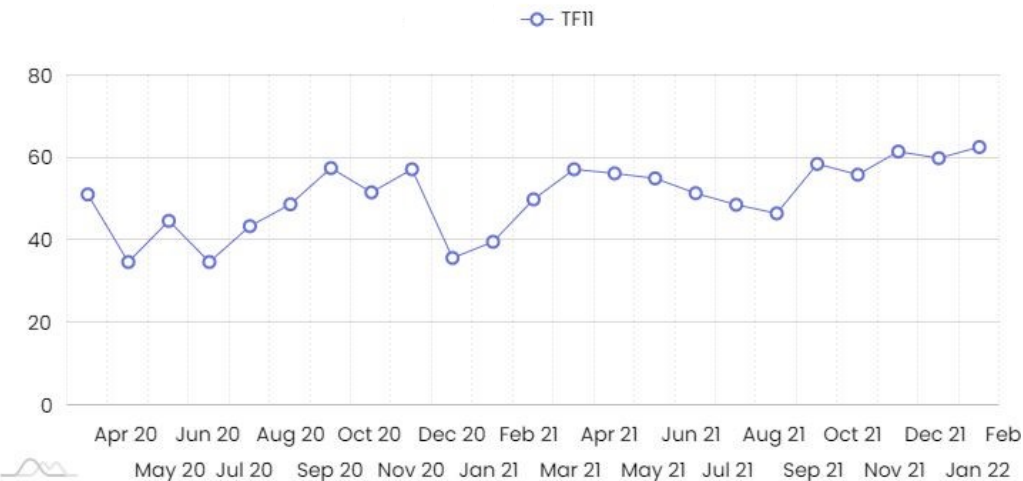


Chart 2: Shrewsbury

Postcode Conversion Trend (%)



Visits to Bridgnorth from TF11 residents were lower in February 2022 than visits to Shrewsbury at 10%. However, the postcode conversion rate fluctuates considerably, and in some months more Shifnal residents visit Bridgnorth than Shrewsbury.

Chart 3: Bridgnorth

Postcode Conversion Trend (%)



Charts downloaded from the Town and Place AI tool which monitors visitor numbers and footfall across a range of town and city centres across the UK.

Key Audit Results

There are a total of 100 commercial premises within the Shifnal survey area. These are primarily in Market Place (20 business premises), Cheapside (13 business premises), Bradford Street (14 business premises plus eight in the Parade), Broadway (15 business premises), Victoria Road (12 business premises) and Church Street (10 business premises) with a small number in Aston Street and Park Street. Gross floor space allocated to these businesses is around 8,800m² (over a quarter on Bradford Street). The average store size is 88m² with units ranging in size from 14m² to 910m². The average size of commercial units in Shifnal is smaller than in any other Shropshire town.

The number of commercial premises in Shifnal town centre has reduced in recent years, especially in 2022 when four units which had been vacant were reclassified as non-commercial. In addition, two units on Cheapside were merged into one, and another business closed in The Parade. By 2023, another unit was lost as two premises in Market Place were merged.

The highest proportion of commercial units is allocated to retail services and comparison retail, the former accounting for 27% of units and the latter for 18%. The former are comparatively small in size and account for just 20% of floor space. Comparison retailers account for 18% of floor space. The share attributable to comparison retail is small compared with the Shropshire average (28%) while the share attributable to retail services is high (19% in Shropshire).

Convenience retail accounts for only a small share of units (5%) but for a significant proportion of floor space (15%). 15% of units are attributable to restaurants and takeaways, while 13% of units are filled by a financial/professional/business services operator. Small numbers of units are filled by tourism & leisure operators, health care providers and non-service businesses. There are 10 vacant premises in Shifnal (10% of units), which is the equivalent of a tenth of floor space.

Chart 4: Number of Shifnal Commercial Premises, 2019-2023

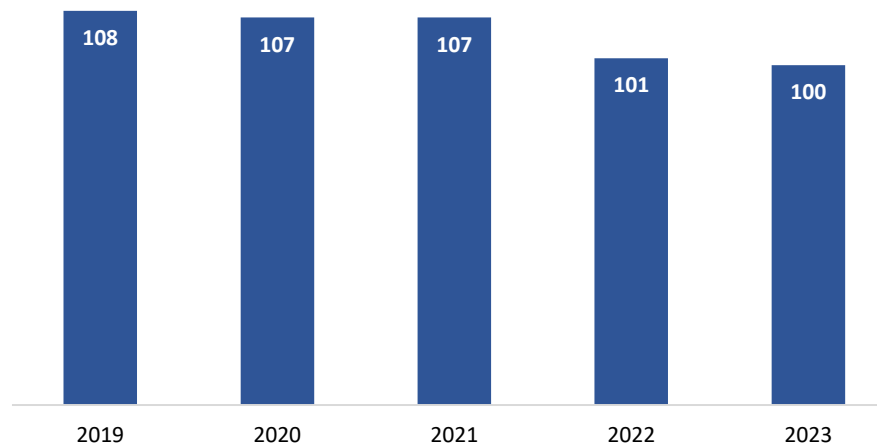


Chart 5: Breakdown of Shifnal Commercial Premises by Classification, 2023

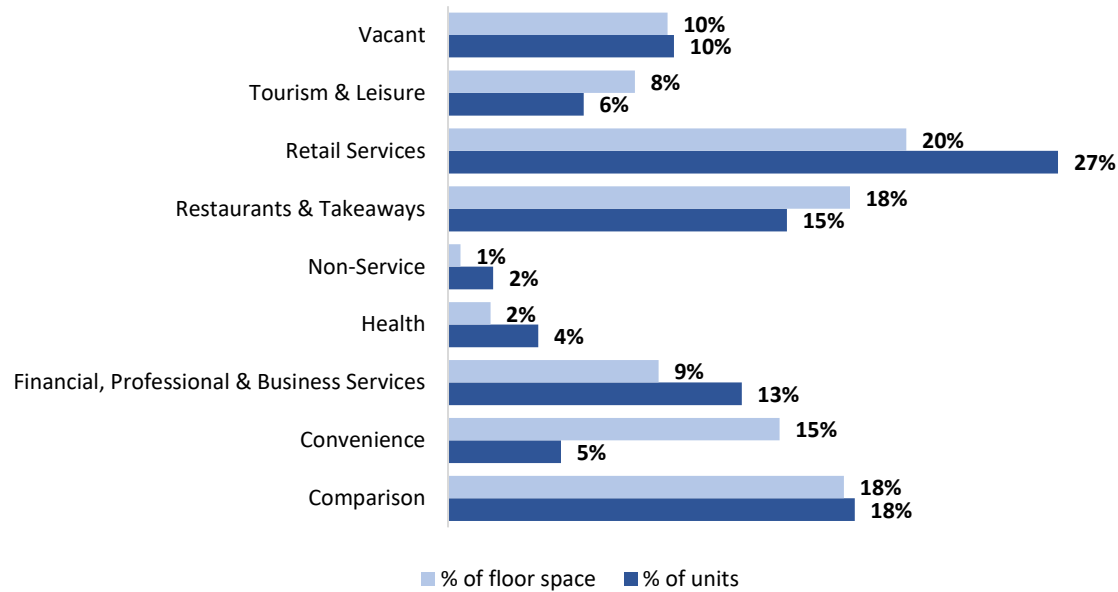
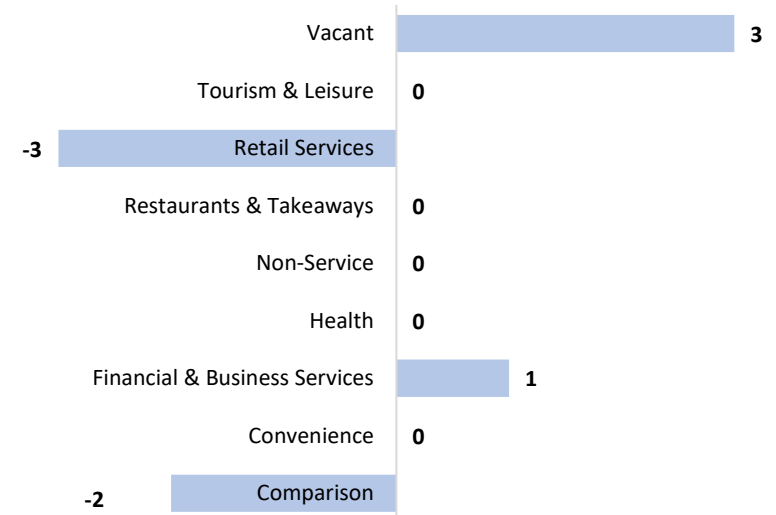


Chart 6: Change in Number of Units by Category, 2022/23



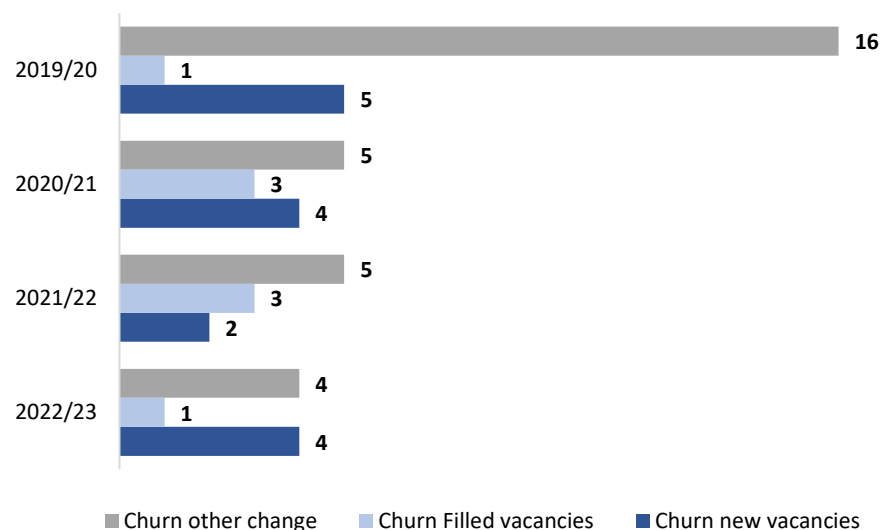
Change since 2022

The composition of the retail/business mix in Shifnal has shifted slightly since 2022, with the net loss of three operators in the retail services sector, and the closure of two outlets in the comparison retail classification.

In contrast, there is an additional financial/business services provider and no change in the number of restaurants/takeaways, convenience or tourism and leisure. Business.

There are three more vacant premises in the town than there were in 2022.

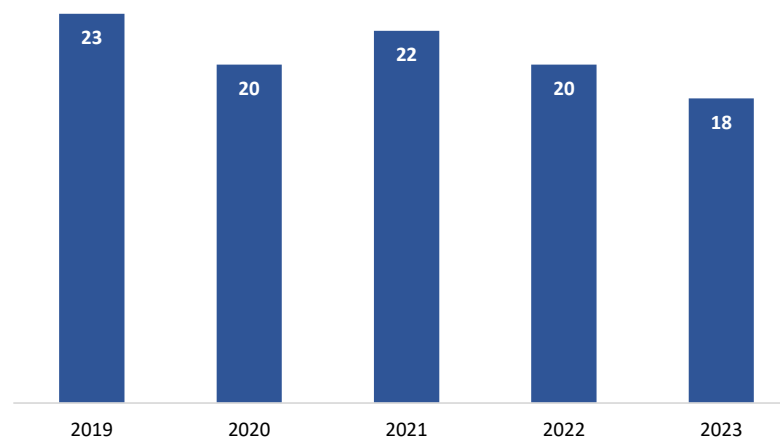
Chart 7: Breakdown of Business Churn 2019-2023



The overall level of churn in Shifnal has been comparatively low since 2020, when 21% of all businesses changed in some way. In 2021, this had reduced to 11%, which is the equivalent of 12 businesses which started up, closed or changed in some way. By 2022, the churn rate had fallen to 10% (10 units changing) and by 2023 to 9% (nine businesses changing).

44% of all churn in 2023 was attributable to premises becoming vacant (20% in 2022, 33% in 2021 and 23% in 2020). Old vacancies becoming occupied represented 11% of the total in 2023 compared with 30% and 25% in the previous two years. Other churn therefore accounted for almost half of the total in 2023. This comprises businesses that have changed hands and/or purpose and those that may have relocated.

Chart 8: Number of Comparison Retailers, 2019-2023

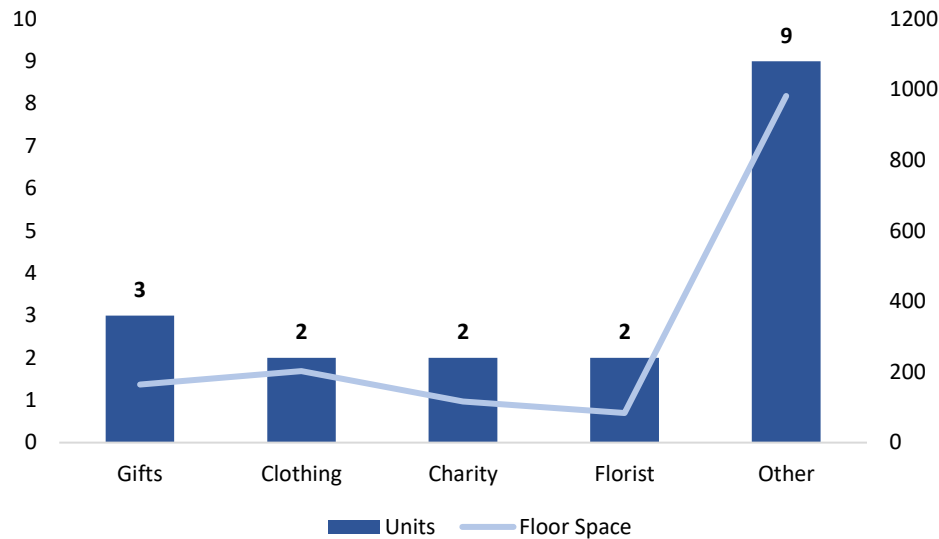


Comparison Retail

The second largest proportion of commercial floor space and units is dedicated to the comparison retail category, accounting for 18% of units and 18% of gross floor space. This equates with 18 stores with just under 1,600m² of floor space. In comparison with similar sized towns in Shropshire, the proportion of town centre capacity allocated to comparison goods is low, perhaps reflecting the proximity of the shopping centres in nearby Telford. The sector has also been in decline in recent years, with two stores having been lost in each of the last two years.

Within the town there are three gift shops, two clothing shops, two florists and two charity shops. All other classification types are represented by just one store. These include an antique store, an electricals store, a golf shop, a home goods store and a pharmacy. The town lost one clothes store, a gift shop and a carpet shop in 2023; these losses were partially offset by the opening of a new cycle store.

Chart 9: Breakdown of Comparison Retail by Type, 2023



The majority of stores are independent, although the town is home to Boots pharmacy and Severn Hospice charity shop (a local charity, but nonetheless a small chain of stores).

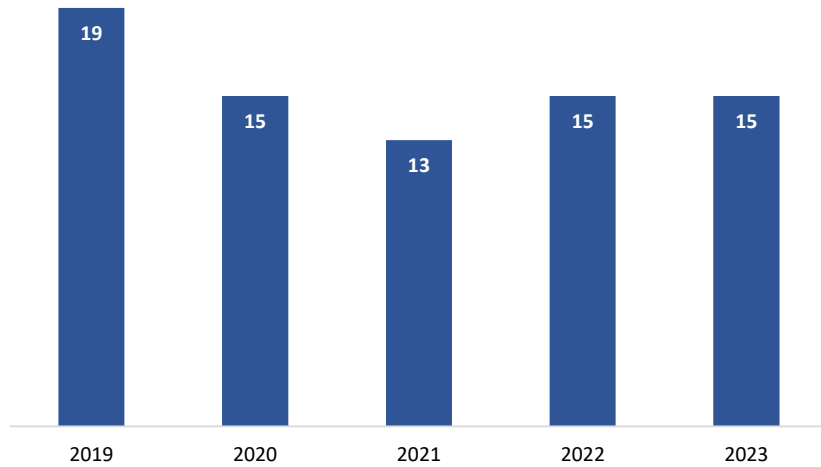
Convenience Retail

There are five convenience stores within the main shopping area of Shifnal. These account for 5% of all units and for 15% of gross floor space. As well as a supermarket (the Co-op), there is a bakery, a butcher, an off-licence and a general convenience store. There has been no change in the convenience offer since 2019.

Other than the Co-op, which is the largest store in Shifnal, and the One Stop convenience store, other operators in the convenience retail sector are independent. The main supermarket facilities for Shifnal residents are located in nearby Telford.

Restaurants & Takeaways

Chart 10: Number of Units in the Restaurant/Takeaway Sector, 2019-2023



15% of units in Shifnal are attributable to restaurants and takeaways, with this category accounting for a slightly higher proportion of gross floor space (18%).

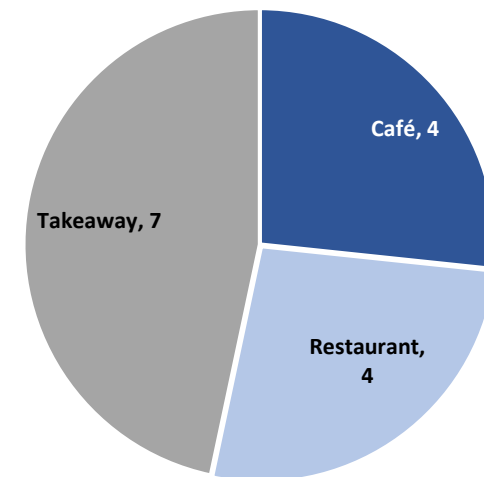
There were four fewer operators in this classification in 2023 than there were in 2019, but no change compared with 2022.

Chart 11: Breakdown of Units in the Restaurant/Takeaway Sector, 2023

The 15 units are split between cafés (27%), restaurants (27%) and takeaways (47%).

A range of cuisines are represented, including fish and chips, pizza, sandwich bars, Indian, Chinese, Italian, modern British and French.

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



Tourism & Leisure

Also within the hospitality sector, there are five public houses/bars, which is one fewer than there was in 2022. These take up approximately 640m² gross floor space. A micro brewery opened in Shifnal between the 2020 and 2021 audits, taking over a previously vacant premise.

There is also a new art gallery which opened in 2023 in a store that previously sold carpets.

There is no hotel or guesthouse located within Shifnal town centre, although one or more of the public houses may offer overnight accommodation.

Finance & Business Services

There are 13 commercial operators in the finance and business services area in Shifnal town centre, accounting for just over 800m² of gross floor space. The classification accounts for 13% of all units in the town and for 9% of floor space. There was no change in the number operating in this classification between 2019 and 2021. In 2022 there were three closures—an accountant, a vet and a recruitment consultant. One new business opened in 2023—a marketing agency.

Chart 13: Number of Finance & Business Services Providers by Type, 2023

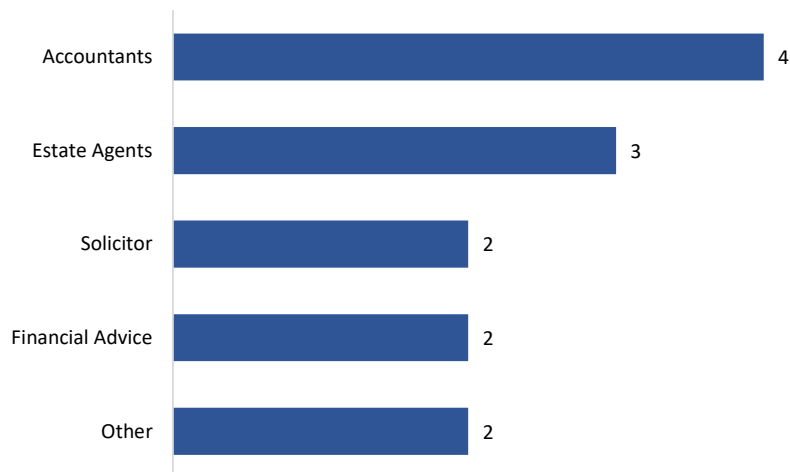
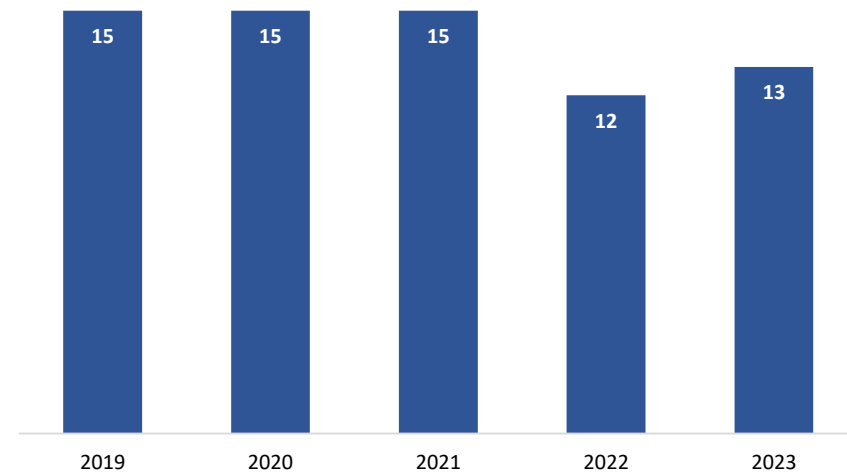


Chart 12: Number of Finance and Business Services Providers, 2019-2023



Included within finance and business services are three estate agents, four accountants, two financial advisers, two solicitors, a recruitment agency and a marketing company.

There are no longer any banks or building societies open in Shifnal.

Retail Services

There are 27 providers of retail services in Shifnal town centre. The number has fluctuated somewhat since 2019, with an additional four stores opening between 2019 and 2020, four closing between 2020 and 2021 and two more opening the following year. In 2023, there were three fewer operators in this sector than there were in the preceding year.

Overall retail services account for 27% of all commercial units in the town centre, and for 20% of all gross floor space. Retail services account for a higher share of commercial units than in most other towns in Shropshire.

Chart 14: Number of Retail Service Providers, 2019-2023

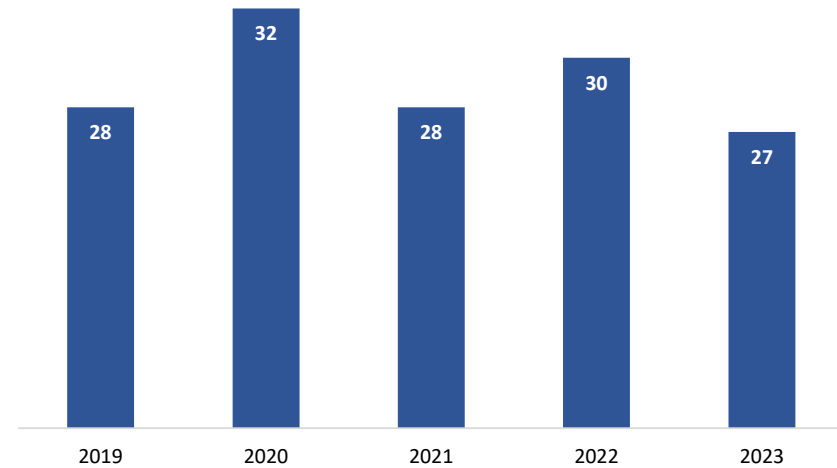
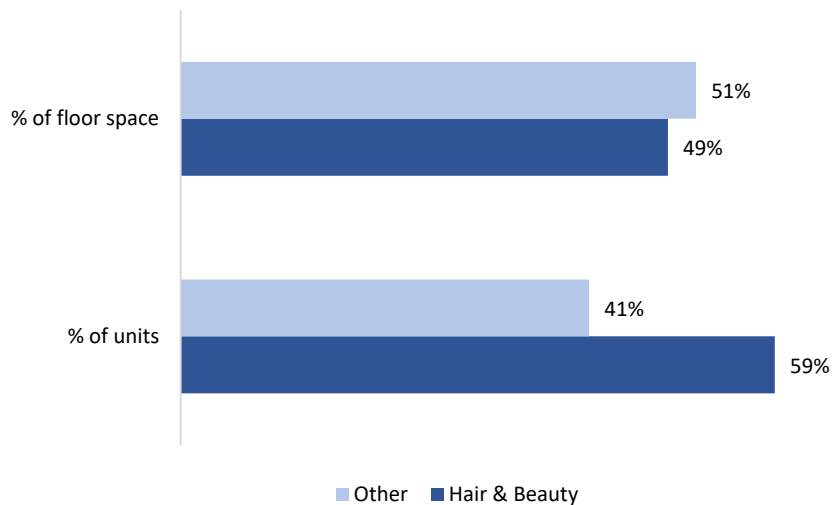


Chart 15: Breakdown of Retail Services by Type, 2023



Although the range of retail services provided in Shifnal is wide, a very high number of operators are in the barber and hair salon classification, with these together representing 59% of units and 48% of floor space. There are three barbers and 13 unisex or ladies' hair salons and beauty parlours.

In addition, there is a tattoo artist, a photographer, a bookmaker, a dog groomer, a nursery, an optician and a funeral director. Since 2023, a tattoo artist, a photographer and a taxi firm have closed. A psychic has taken over the premises previously occupied by the photographer.

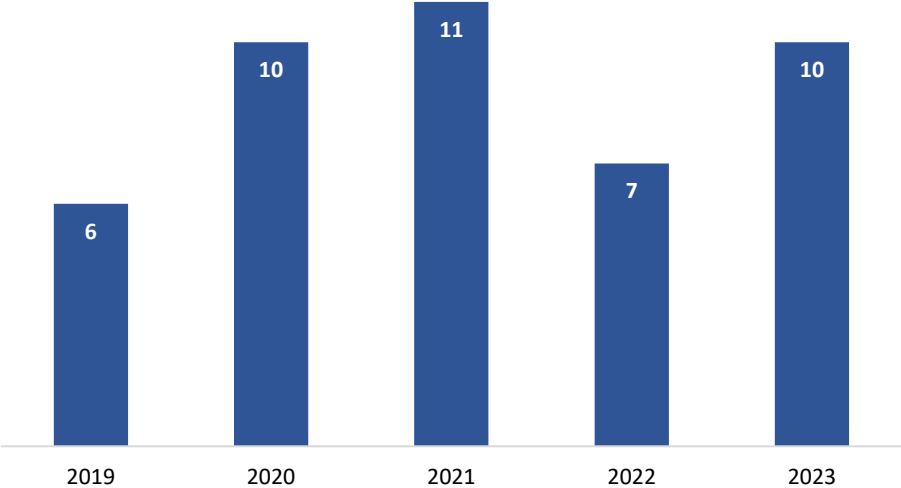
Health

There are four health care providers operating in Shifnal, including two foot specialists/chiropractors, a sports injury specialist and a weight management consultant. There has been no change in the health offer over the last year.

Vacant Units

10% of Shifnal town centre outlets are vacant (10% of gross floor space). This is below average in comparison with comparable market towns in Shropshire. It is also lower than the vacancy rate nationally which stood at 13.9% in the second quarter of 2023 according to BRC (data relating to high streets only). Although the vacancy rate fell between 2021 and 2022, this was primarily due to a number of long term vacant units being reclassified as non-commercial. In 2023, the number of vacancies rose by three. Empty units range in size from 14m² to 250m².

Chart 16: Number of Vacant Premises, 2019-2023



40% of all vacant premises in Shifnal had become vacant between the 2022 and 2023 audits. Three units (30% of all vacancies) have been empty since 2020, and one (10%) has been unoccupied since at least 2019.

Map 5: Location of Vacant Commercial Premises, 2023



The number of vacant commercial premises in Shifnal rose by three between 2022 and 2023. Only one premise that had been vacant in 2022 had been filled, with the remaining six remaining unoccupied. Four premises were vacated between the 2022 and 2023 audits.

Map 6: Change in Location of Vacant Commercial Premises, 2022 –2023



Residential Premises

Although the main shopping streets in Shifnal are primarily occupied by commercial premises, there is also a significant quantity of residential dwellings. In total, 88 residential premises are located in the audit area, of which the majority are flats (67 or 76%) which are largely located above retail or other commercial outlets. This stock is spread across the main shopping area. There are small quantities of detached and semi-detached housing stock, most of which is towards the periphery of the main shopping zone. There are 11 terraced houses in Shifnal town centre (13% of the total), with these being located in Victoria Street, Church Street and Market Place. The volume of residential premises in Shifnal has risen by three since 2020 (all flats).

Map 7: Location of Residential Premises in Shifnal Town Centre

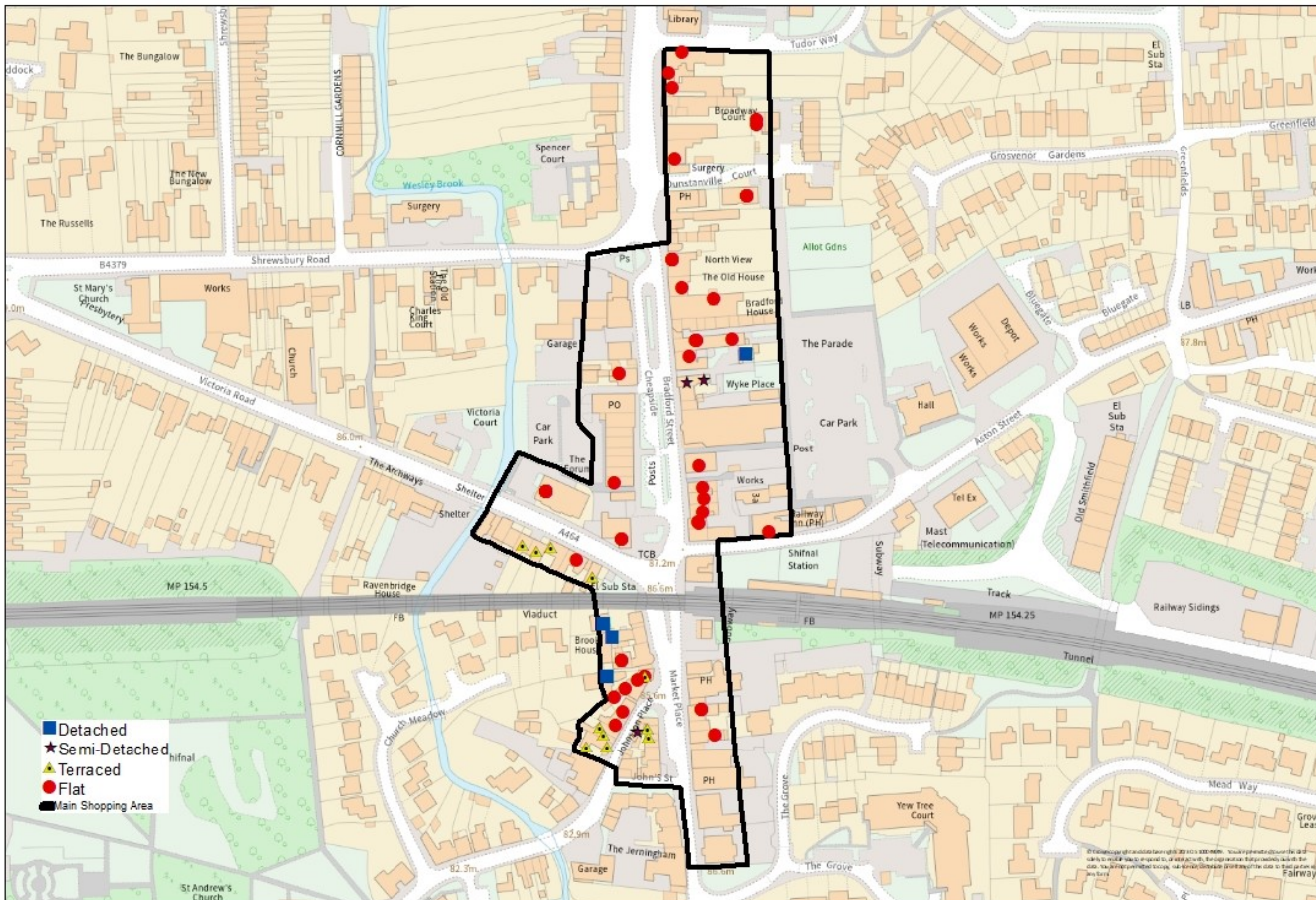


Chart 18: Breakdown of Residential Properties by Type

