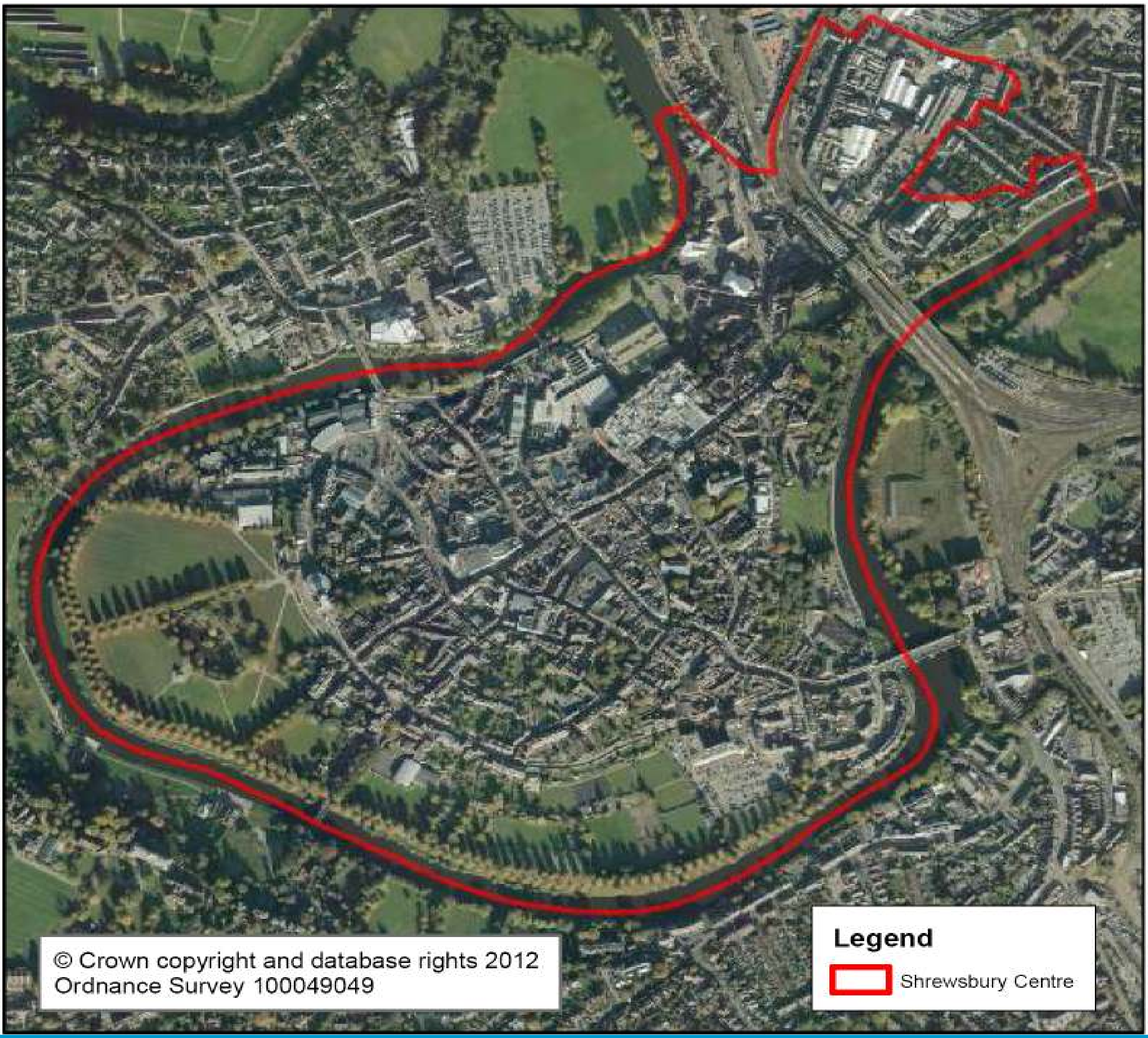
Shops Survey 2012 - Shrewsbury Centre



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Executive Summary

Shrewsbury is the largest retail centre in Shropshire and attractive to both residents of Shropshire as well as tourists. As a result retail development within Shrewsbury Centre has increased over the years. There are many access routes to Shrewsbury Centre, with adequate transport links, bus services, Park and Ride service and a train station, providing shoppers with multiple viable modes of transport.

Shrewsbury Centre has the highest shop unit total in Shropshire, with the majority of the shops found on the High Street or in Charles Darwin and Pride Hill, Riverside shopping centres. There are now 656 shop units in Shrewsbury Centre – this represents an increase of 23 shop units (3.5%) since the survey was last undertaken in 2009. This increase can be found in five of the six defined shop categories *(see Figure 1)*. The majority of new shop units are within the Comparison, Vacant and Catering categories. Services are the only category to show an overall reduction in shop units from 2009, though this is only a reduction of 1 shop.

Key findings include;

- There has been a slight increase of Comparison shops now totalling 337 shops within Shrewsbury Centre or 51.4% of all shops. This has historically been and continues to be the dominant retail classification in Shrewsbury Centre.

- The restaurant, café and takeaway shop type has the most shop units within Shrewsbury Centre, totalling 13.4% of the total shops. This is an increase from 12.6% in 2009 and from 11.4% in 2005.

- The total gross floor space for Retail space in use for Shrewsbury Centre is 182,362m^2. This is an increase from 179,020m^2 in 2009.

- Since 2009 there has been an increase of 8 Vacant shop units, now totalling 107 in 2012. The majority of these shop units are located in the Darwin and Riverside shopping centres. It is important to note that there is a large planned development in the Riverside Mall. It is confirmed that Debenhams will be one of the first businesses to open a store in the new Riverside development.

- The survey shows there has been a steady increase of Vacant retail floorspace rising from only 3.1% of the total gross floorspace in 1979 to 11.5% in 2012.

- Of the 656 shop units in Shrewsbury Centre, 162 have changed their use since 2009. A change of use can include a change of name and a change in the shop type, for example Suits Plus is now Pandora. This means almost a quarter (24.4%) of total shops in Shrewsbury Centre have changed use or ownership at least once over the last 3 years.

It is important to note that this report can only provide data on the current retail situation. Comparisons between the 2012 Shops Survey and previous surveys are based on data collected at two snapshots in time and do not provide information on what occurred in between surveys.

1. Introduction

The Shops Survey Report is a project undertaken by the Research and Intelligence Team every three to four years, or earlier if appropriate. This report provides an overview of the current retail activity in Shrewsbury Centre as of July 2012 and compares this with activity recorded in historic shop surveys of Shrewsbury Centre, dating back to 1979. It is important to note that the Market Hall, located by the clock tower on Mardol Street, is not included in this survey or previous surveys of Shrewsbury Centre. This report will form part of a series of market town Shop Survey reports being prepared by the Research and Intelligence Team.

1.1 Methodology

The survey defines "shop" as any property which is either operating as a retail or service outlet, café, restaurant or take-away, or which has a shop front, so non-retail or service uses are also recorded. **The survey also records public houses, car showrooms/garages and shops which have recently changed to a residential property, but these are non retail use and are therefore not included in the analysis.** Only ground floor uses are recorded, however where a use extends over more than one floor, the whole of the shopping floorspace is counted.

The survey is carried out by undertaking one or more site visits to identify all units as defined above and recording the town, name, address and type of shop as well as its grid reference. This data is then analysed and compared with the results of previous surveys dating back to 1979. Any alterations to a shop which results in changes to its floorspace (derived from the 1979 floorspace figures) are identified from the Council's Planning Land Use Monitoring System (PLUMS). This information is recorded on an Access Database and shop locations are plotted using Geographical Information System (GIS). In order to categorise shops for analyses each shop is assigned into a trade category, this allows changes to be easily identified. Below are the descriptions for the broad retail categories used in this report (see appendix 1 for a full list of categories and definitions).

The detailed data analysis of the survey records changes in shop use and name, changes in gross and net floorspace, trends in vacant shops and floorspace, changes in location and any new shops are also identified.

1.2 Shop Category

Industry standard practice is to classify shop types at the broadest level into Comparison, Convenience, Retail Services and Services. In addition this survey reports on catering facilities and vacant units to give a fuller overview. To aid understanding the table below gives examples of shop types which fall into these categories. Please see a more detailed definition in Appendix 2. Shops are classed as in a category based on the dominant service or product.

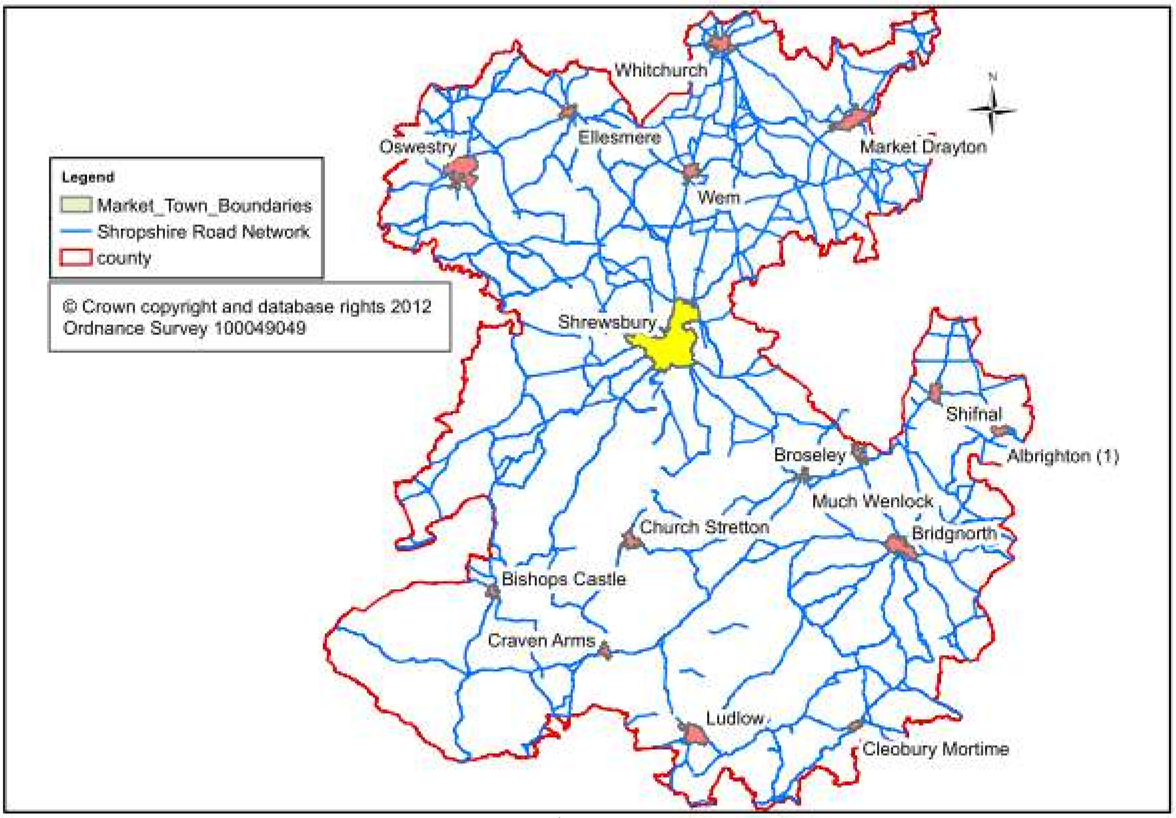
Figure 1: Shop Category Description

Category	Description
Comparison	Clothing, footwear, durable household goods, DIY, books, chemists, opticians, sports goods, etc.
Convenience	Food (excl. takeaways, restaurants etc.), alcohol (exc. Pubs etc.), tobacco, newspapers etc, cleaning materials
Retail Services	Hair and beauty salons, dry cleaners, health salons.
Services	Banks, building societies, estate agents, travel agents, insurance brokers.
Catering	Restaurants, cafes, takeaways, fast food outlets.
Vacant	Building has no commercial use.
Exclude	Offices, residential, storage and public houses

2. Context

Shrewsbury is a high tourist attraction within Shropshire, most famous as the birthplace of Charles Darwin and renowned to be one of England's most splendid heritage towns with over 600 listed buildings. Shrewsbury is located close to two World Heritage Sites, nine museums and historic sites of Ironbridge Gorge and aqueducts of Pontcysyllte and Chirk.

Figure 2: Towns and Settlements of Shropshire



There are 67,000 residents in Shrewsbury.[1] This has risen from 56,200 in 1971 (8 years before the first Shops Survey), this is an increase of 19.2%.[2]

Shropshire Council is the largest employer in Shropshire, although not all are based in Shrewsbury. The largest employer for Shrewsbury is the Health Sector with 25.3% of employed people. This is followed by Retail with 13.1%.[3] Shrewsbury is the main employment centre within Shropshire and accommodates a workforce of approximately 39,800.[4] This is more than six times as many employees as the second largest employment centre in the County (Oswestry).

There is a railway station that is managed by Arriva Trains Wales; the station has direct trains to stations including Manchester Piccadilly and Birmingham New Street. Several main roads connect Shrewsbury to other settlements including the A49, A53 and A5. There are several cycle routes that pass through Shrewsbury, including Routes 44 and 81 of the National Cycle Network.[5]

For further information on Shrewsbury see Appendix 1.

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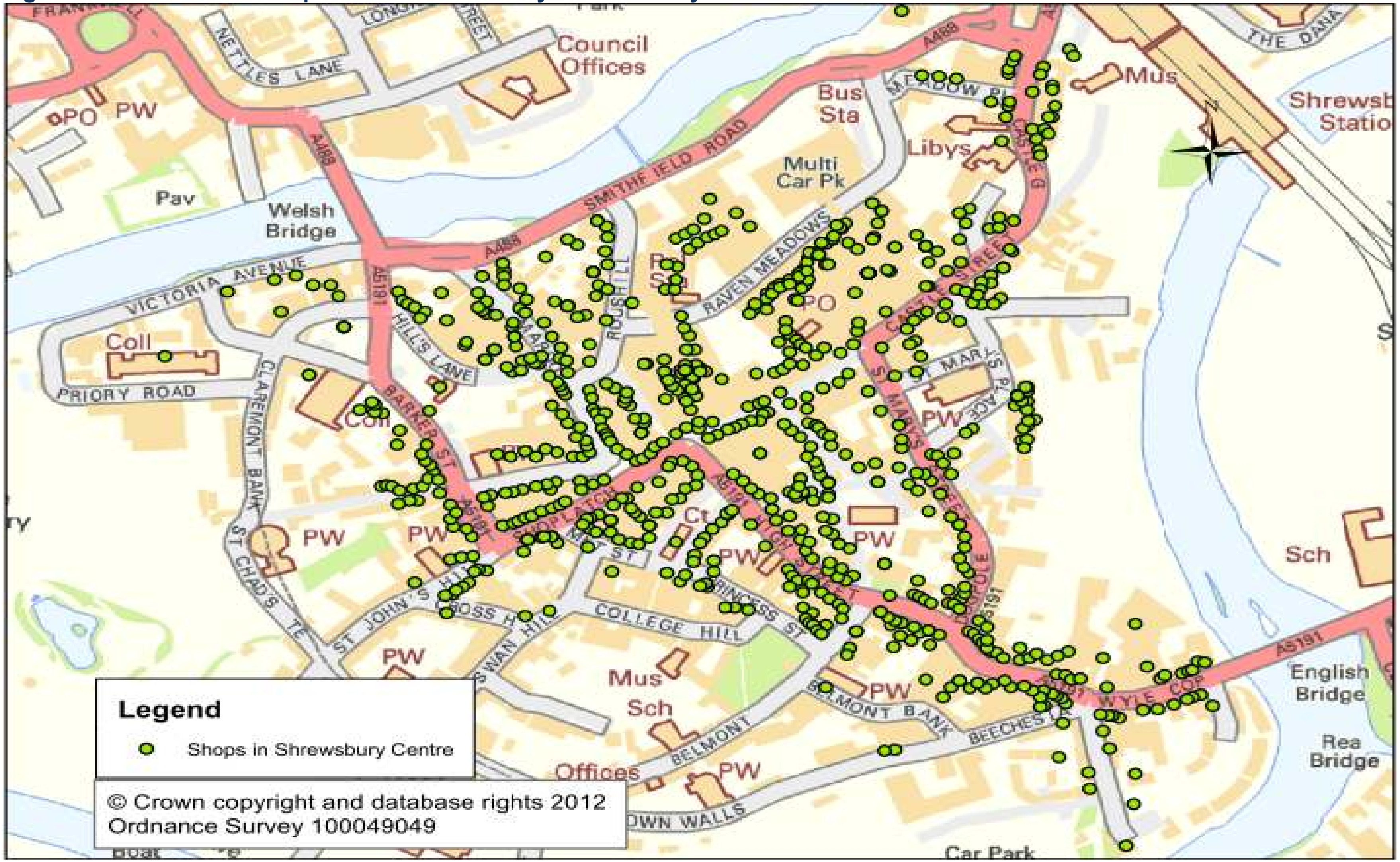
[1] *Based on ONS 2010 Mid-Year-Estimates*
[2] *Based on 1971 Census Results*
[3] *Business Register and Employment Survey 2010, Office for National Statistics, © Crown Copyright 2012.*
[4] *BRES 2010, Office for National Statistics, © Crown Copyright 2012*
[5] *Shropshire Council GIS Layers, 2012; Arriva Trains Wales, © Copyright 2012*

Figure 2.1: Location of Shop Units in Shrewsbury Centre – July 2012



This map provides a contextual view of Shrewsbury Centre and all the shop units surveyed in 2012. The largest congregation of shops are on on the main access streets to Shrewsbury Centre such as; High Street, Wyle Cop and Shoplatch. There is also a large gathering in the two shopping centres; Darwin Centre and Pride Hill as well as side roads such as Mardol and Roushill.

3. Number of Shops

This section examines the total number of shops within Shrewsbury Centre and looks closely at the type of shops in the centre. This analysis is supported by Shop Surveys of the town centre over a period of thirty years, from 1979 – 2012.

Figure 3: Number of Shops by Category from 1979 to 2012

	1979		1986		1993		1995		2001		2005		2009		2012	
	No	**%**	**No**	**%**	**No**	**%**	**No**	**%**	**No**	**%**	**No**	**%**	**No**	**%**	**No**	**%**
Catering	31	6.5	65	11	59	8.6	65	9.1	77	12	72	11	80	13	88	13
Comparison	311	65	346	59	384	56	374	52	355	54	368	58	333	53	337	51
Convenience	50	10	46	7.9	36	5.3	35	4.9	27	4.1	28	4.4	28	4.4	31	4.7
Retail Services	20	4.2	26	4.5	32	4.7	32	4.5	40	6.1	62	9.8	46	7.3	47	7.2
Services	52	11	57	9.8	63	9.2	67	9.3	54	8.3	45	7.1	47	7.4	46	7
Vacant	16	3.3	43	7.4	111	16	144	20	99	15	57	9	99	16	107	16
Total	480	100	583	100	685	100	717	100	652	100	632	100	633	100	656	100

*The Vacant category is not highlighted due to the fact it is not an official shop category, but still important information to display.

3.1 Current picture

Figure 3 shows the total amount of shops in Shrewsbury Centre now stands at 656, this is excluding certain shop types i.e. Public Houses. For a full list on excluded shops see Appendix 2.

The most popular individual shop types *(full list in Appendix 2)* within the Comparison sector are Women and Girls wear and Jeweller/Watches/Clocks Shops with 43 and 29 shops respectively.

3.2 Comparison with the 2009 survey

There has been a rise in the number of shops within each shop category with the exception of Services.

The majority of the increases in the total amount of shop units seen in 2012 are classed as Catering and Vacant, with a rise of 0.8% and 0.7% respectively. The Services category has seen a reduction of one shop unit since 2009 and now stands at 46 shop units. This is the only category to report a loss in actual shop units.

Despite only seeing a rise of four shop units since 2009 the Comparison category has remained the dominant category with 337 shop units or 51.4% of the total shops in Shrewsbury Centre. This has historically been the case dating back to the first Shops Survey in 1979.

3.3 Historic comparisons

3.3.1 Convenience

Despite a significant decrease from 50 shop units in 1979 to 35 in 1995, Convenience shop types have been slowly increasing since 2001. There were only 27 shop units in 2005 and now in 2012 there are 31 shops. Sweet/Newsagent/Tobacconist shop type appear to be the leading shop type behind the rise in Convenience shops having increased to 11 shops in 2012 from 8 in 2009 and 7 in 2005. Despite this increase the percentage gross floorspace for Convenience stores has dropped *(see page 22)*, this could well be due to the nature of Convenience stores (i.e. newsagents) requiring less floorspace in comparison to other shop types.

3.3.2 Comparison

The Comparison category has been the dominant category in Shrewsbury. In 1979 there were 311 Comparison shops recorded representing 64.8% of all shops. At its peak in 1995 the Comparison category accounted for 374 shops. This has dropped to 337 in 2012.

Women and Girls wear and Jeweller/Watches/Clocks shop types have dominated the Comparison category since 2001. Despite recording a decline of 4 shops since 2005 Women and Girls wear shops still account for 43 shops or 12.8% of all the shops within the Comparison category. Jeweller/Watches/Clocks shops have increased by 7 shops since 2005 and now represent 28 shops or 8.3% of all Comparison shops. Women and Girls Wear, Jeweller/Watches/Clocks and Charity shops total 93 shops or 27.3% of all Comparison Shops *(see pages 15-17)*.

3.3.3 Retail Services

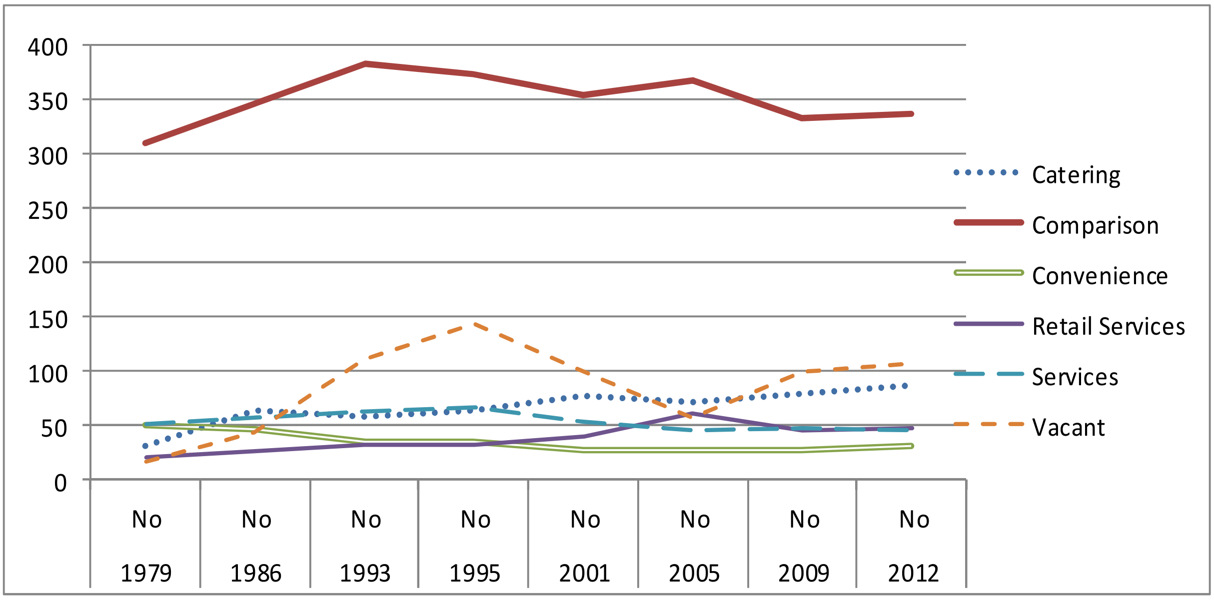
In 1979, 20 shops were classified as primary Retail Services representing 4.2% of all shops in Shrewsbury Town centre. There has been a steady increase until it peaked in 2005 with 62 shops provided Retail Services, representing 9.8% of total shops.

Retail services in 2012 represent 47 shops in Shrewsbury Centre, a rise of 1 shop since the 2009 survey. Despite the increase in shops, Retail Services now represent 7.2% of total shop units in Shrewsbury Centre, a reduction of 0.1% since 2009. This would indicate that Retail Services are not growing at the same rate as other categories for example; Catering recorded a 0.8% increase from 2009 to 2012.

3.3.4 Trends

It is useful to identify any current or persistent trends in the number of shops in Shrewsbury Centre. This can help provide knowledge on how various shop Categories have reacted over the years. However, due to the unprecedented scale of the global recession any trends identified will have a high level of uncertainty on whether they will continue.

Figure 3.1: Number of Shops in Shrewsbury Centre 1979 to 2012



Since 1979 Shrewsbury has grown both demographically, geographically and economically, this is reflected in the rise of 176 shop units. However, Figure 3.1 shows that the number of shops in every category has fluctuated between 1979 and 2012. The Catering, Comparison, Retail Services and Vacant Categories have shown an increase in the number of shops in 2012 compared to 1979. The Services Category appears to have remained fairly consistent over the last 33 years with only slight rise and falls. Figure 3.1 appears to indicate the number of Convenience style shops has reduced constantly since 1979 until it plateaued in 2001. Shrewsbury Centre is a key retail town, however the need for Convenience style stores is dependent on nearby population, most of which are located outside Shrewsbury Centre. This could well mean that Convenience stores are more likely located near and amongst these populated areas, rather than the centre.

3.4 Summary

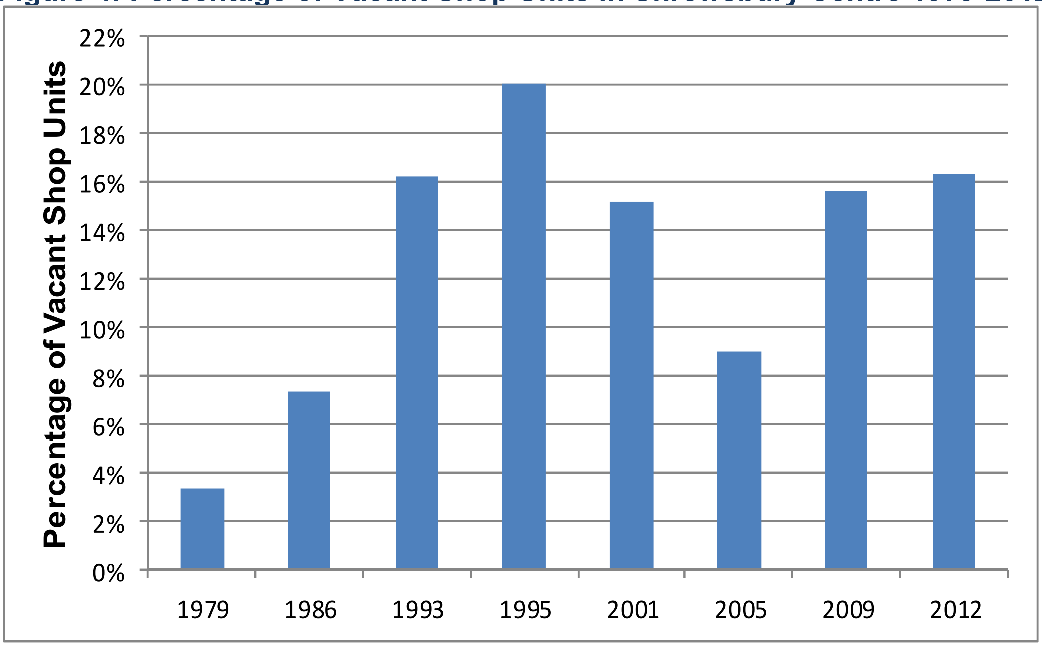
Overall the number of shop units in Shrewsbury Centre has increased in 2012. This is demonstrated with all but one category showing an increase in their total amount shop units compared to 2009.

This section provides a general overview of the current situation within Shrewsbury Centre regarding the number of shop units and cannot provide data on the economic situation of these shops or Shrewsbury Centre. It may be we can assume that as there have been no significant reductions in any shop Categories in 2012, Shrewsbury Centre remains a critical retail hub for Shropshire. This may lead to the assumption the affects of the recession has not currently led to an overwhelming number businesses closing or relocating away from Shrewsbury. However, Figure 3.1 provides an almost stagnant picture between 2009 and 2012 when compared with the changes identified between 1979 and 2009. Again it is possible this is attributed to the affects of the recession, if this is the case then minimal growth or potential decline could be expected in the future within some or all categories.

4. Vacant Shop Premises in Shrewsbury Centre

The Vacancy rate in Shrewsbury Centre has continually increased since 2005 and now represents 107 shop units or 16.3% of total shop units for 2012. Some of the most recent shop units to go vacant formerly housed; JJB Sport, Gamestation, Virgin, Cath Tate Cards and Sacred Moon. While some of these shops were independent retailers others were large national and international companies. Some businesses had multiple branches within the Shrewsbury loop and may have reduced this for cost saving measures or the parent company went into administration, Clinton Cards is an example of this. It would appear that the recession has had an impact on retail within Shrewsbury Centre, though the affects differ between each company.

Figure 4: Percentage of Vacant Shop Units in Shrewsbury Centre 1979-2012



- There are 35 shops in Shrewsbury Centre which were classed as Vacant in 2009 and have been filled in 2012, some of the new business include; Shrewsbury Bakery, Free Spirits, Blue Apple, Wallis and East.

- Restaurant/Cafe/Takeaway (NA) shop type filled the most empty shop units with 5, closely followed by Women and Girls Wear, Draper/Haberdashery/General Clothes and Antiques with 4 apiece.

- Of the 35 filled shop units 14 are located on Wyle Cop or Castle Street/Castle Gate, the remainder can be found in various locations through Shrewsbury Centre.

- The Comparison category was responsible for the change of 23 of the 35 formerly Vacant shop units.

- Figure 4 indicates the number of vacant shops in Shrewsbury Centre peaked in 1995 at 20.1% this was an increase of 800% from 1979.

- There was a large reduction of 4.9% in the number of Vacant shop units between the 1995 and 2001 Shops Survey. There was another reduction between 2001 to 2005 of 6.2% which meant Vacant shops represented only 9% of total shop units, the lowest figure since 1986.

Figure 4.1: Overview of Vacant Shop Premises in Shrewsbury Centre - July 2012

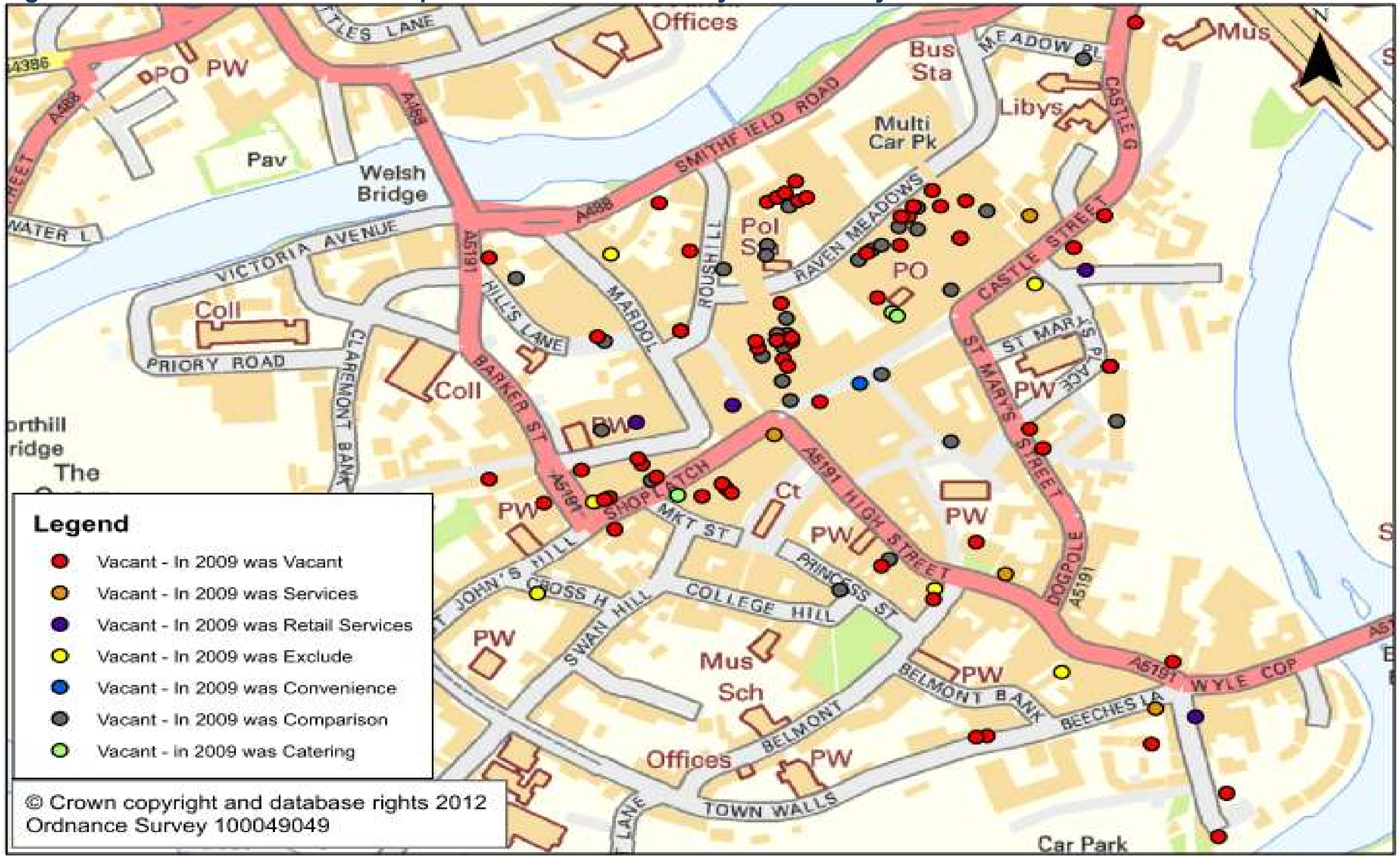


Figure 4.1 shows the location of the 107 vacant shop units in 2012. It also provides information on what the shop category of the shop units in 2009 before they became vacant. The largest cluster of vacant shops appears to be in the two shopping centres; the Darwin Centre and Pride Hill and the majority shops were formerly vacant or part of the Comparison Category. This map shows a cluster of Vacant shop units in Riverside Mall, it is worth noting that there is a planned major redevelopment of Riverside Mall with the intention of attracting businesses to the area. It has been confirmed that Debenhams will be opening a store in the new mall. See Appendix 1 for further information.

5. National Retail Overview

It is important to note the current national retail situation, to understand whether Shrewsbury Centre is in keeping with the national trend or for better or worse bucking the trend.

There has been much dialogue over the last few years about the condition of our High Streets and whether they will soon become unnecessary and extinct with the rise of out of town shopping, supermarkets and internet shopping. Mary Portas was tasked in 2011 to write a report on the current condition of our High Streets and recommendations on how to sustain and improve the current situation. There were many facts and trends presented in this report *(see Appendix 1 for link to the report) which are* useful for analysis when compared with Shrewsbury Centre.

Some key points noted in this report are; nationally it is estimated one is six shop units are vacant, there are 15,000 lost stores between 2000 and 2009 with a further 10,000 estimated in the last couple of years, and footfall on High Streets has fallen 10% in the last 3 years (excluding Central London). These facts suggest a downward spiral of our High Streets, particularly in the last few years and unlikely to change with the current economic climate.[6] Interestingly when compared to Shrewsbury Centre there are some differences. There are an estimated 1 in 6 Vacant shop units correlating with Mary Portas's findings, however Shrewsbury Centre has seen an increase of 3.6% in shop units and appears to not be a High Street not affected by the predicted 10,000 shop units lost between 2009 and 2011.

The Department for Business, Innovation and Skills/Genecon and Partners (2011) Understanding High Street Performance report is another report to supply detailed information on High Streets. This report suggests that of all retail spending only 42.5% is on High Streets based on 2011 figures, it is estimated by 2014 this figure will drop to 39.8%. The reason for the drop is the increase of 'Out of Town' sales accounting for 31.5% of retail spending in 2011 and an estimated rise to 32.3% is 2014.[7]

It is suggested one reason for the decrease in spending on High Streets and the result of shop closures is due to online sales. Though internet sales only account for less than 10% of retail spending it is suggested the e-commerce is responsible for nearly half of retail sales growth between 2003 and 2010. This is likely due to the increased access to the internet. Also m-commerce (retail items purchased on a mobile) has increased over 500% over the last two years.[8] The result of this access to internet sales means some businesses are adapting, reducing duplicating stores on High Streets and focusing on developing websites for customers to visit and purchase from. This may result in a negative spiral with fewer consumers visiting the High Street through lack of shops or buying online could then result in further shops closing. As a national average 67% of stores on High Streets are independent and as such are possibly not able to adapt to website sales and will feel the loss of footfall greater than larger chain stores.[9]

Another possible reason for the reduced number of shops is the rise of supermarkets. For every £1 spent by a consumer 50pence is spent of food and grocery sales. A 2008 report from the Competition Commission found that of the 40,000 butchers and 45,000 greengrocers present in 1950, fewer than 10,000 each remain by 2000. This dramatic decline is found in fishmongers and bakers as well. The grocery market is now 97% made up of supermarket stores. However supermarkets are now branching out into other retail products, for example Sainsbury's are the 7th largest clothing retailer by volume in the UK

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[6] *The Portas Review – Page 8*

[7] *Department for Business, Innovation and Skills/Genecon and Partners (2011) Understanding High Street Performance – Page 17*

[8] *The Portas Review – Page 9*

[9] *Local Data Company*

and more than 100 Tesco's stores have opticians.[10] There is a growing trend of electrical, cosmetics and services in supermarket stores, with a Sainsbury's store opening a GP clinic. This has provided the consumer with ease and convenient shopping, however this will have a detrimental effect on the local economy. The New Economics and Foundation has found spending off of the High Street is more likely to leave the local area straight away.[11] Also this dependency on large supermarkets means there is less for future entrepreneurs and retailers.

Mary Portas provides recommendations on how to sustain and improve the current condition of our High Streets and this effort must come from all sectors and all people to work. For a full description of the recommendations follow the link in Appendix 1.

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[10] *Latto A article 17 May 2011 J Sainsbury – now the seventh largest UK clothing retailer by volume. http://www.stockopedia.co.uk/content/j-sainsbury-now-the-seventh-largest-uk-clothing-retailer-by-volume-56629/*

[11] *New Economics Foundation have written to me about how spending and re-spending creates a multiplied impact and works harder for the local economy. See alao Sacks J (2002) The Money Trail: Measuring your impact on the local economy using LM3*

6. Changes in Shop Types in Shrewsbury Centre

6.1 Restaurant, Café and Takeaway

There are more restaurant, café and takeaway shops in Shrewsbury Centre than any other shop type, they represent 88 or 13.4% of all shop units. The restaurant, café and takeaway shop type in 1979 accounted for only 31 or 6.5% of shops in Shrewsbury Centre, this reflects the growing popularity for members of the public to eat out.

- The restaurant, café and takeaway shops are at their highest since the first Shops Survey in 1979, with 88 shops.

- Of the 88 catering shop units 11 have changed their function to the restaurant, café and takeaway industry since the 2009 survey. Fast food, take away, café's or coffee bars account for 32 of the 88 restaurant, café and takeaway shops the remainder are restaurants.

- The 88 restaurant, café and takeaway shops stated do not include Public Houses which are excluded under shop types *(See appendix 2)*.

Figure 5: Restaurant, Café and Takeaway Shops in Shrewsbury Centre

	1979		1986		1993		1995		2001		2005		2009		2012	
	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%
Restaurant, café and takeaway	31	6.5	65	11.1	59	8.6	65	9.1	77	11.8	72	11.4	80	12.6	88	13.4

*Percentage of Total Shops.

6.2 Radio/TV/Electrical

With the ever increasing invention and innovation of technology, radio/TV/electrical shop types will constantly have new products to sell. However there has been a national decrease in the purchase of big ticket electronic items.

- The number of electrical goods shops in Shrewsbury Centre has fluctuated since 2001. There were 25 Shops located in Shrewsbury Centre in 2001 and 20 remain in 2012, of which seven recorded in 2001 were still in business in 2012, including two local businesses; the Phone Box and Creative Audio.

- There are five new radio/TV/electrical shops in Shrewsbury, these are; ATComputers, Qual IT Ltd, Phone and Computer World, Totally Games Ltd and Furniture and Electrical World.

- In 2012 there are eight phone shops, two computer shops, two electronic game shops, one audio shop and seven mixed purpose shops.

Figure 5.1: Radio/TV/Electrical Shops in Shrewsbury Centre

	2001		2005		2009		2012	
	No.	%	No.	%	No.	%	No.	%
Radio/TV/Electrical (Comparison)	23	3.5	23	3.6	16	2.5	20	3.0

*Percentage of Total Shops

6.3 Charity Shops

Charity shops have an ever increasing presence on high streets and town. This may well increase during the global recession due to the low cost products sold.

- There are 20 Charity shops within Shrewsbury Centre, the majority of which are located on Mardol Street.
- Of the 20 Charity shops there is only one new shop since 2009; Severn Hospice was formerly Seconds Ahead, Severn Hospice now has two shops in Shrewsbury.
- Relate Charity, Severn Hospice, Oxfam each have two shops in Shrewsbury, Cancer Research now has three shops in Shrewsbury.

Figure 5.2: Charity Shops in Shrewsbury Centre

	2001		2005		2009		2012	
	No	%	No	%	No	%	No	%
Charity Shop	15	2.3	17	2.7	19	3.0	20	3.1

*Percentage of Total Shops

6.4 Greeting Cards

The greeting card industry has changed rapidly in recent years and as a result has directly affected their declining presence on the high street of Shrewsbury. A reason for the 'boom' and 'bust' on high street card shops could be due to the growth in internet companies specifically able to design cards and deliver cards to the buyer, adding convenience and choice to consumers.

- Between 2001-2005 there was a 'boom' in greeting card shops in Shrewsbury Centre, increasing by 40%, with the increase due to local shops such as; Brian Howel Cards, Write it & Kite it Now and larger shops such as; Cardfair, Occasions and Card Factory Shop.
- 2005 was the peak of the Greeting Card industry in Shrewsbury Centre totalling 1.6% of total shops for that year.
- However between 2005-2009 Card Outlet and Occasions were no longer in Shrewsbury which meant only 8 shops remained. And between 2009-2012 one of the two Clinton Card shops was no longer present along with Cards and Gifts and Cath Tate Cards. This meant only greeting card shops now remain in Shrewsbury Centre totalling only 0.6% of shops.

Figure 5.3: Greeting Card Shops in Shrewsbury Centre

	2001		2005		2009		2012	
	No.	%	No.	%	No.	%	No.	%
Greeting Cards	6	0.9	10	1.6	8	1.3	4	0.6

*Percentage of Total Shops

6.5 Jeweller/Watches/Clocks

Jeweller/Watches/Clocks shops have increased rapidly since 2001, with the biggest change between 2005 and 2009 where there was an increase of 8 shops recorded.

- Since 2001 there have been ten new shops in Shrewsbury Centre, with large retailers such as H.Samuel, Earnest Jones and T.H.Baker present.

- The increase of shops could be due to the personalised nature of Jeweller/Watches/Clocks for consumers and the ability of large and small retailers to create a variety designs with different products which could appeal to a large and varied consumer base.

Figure 5.4: Jeweller/Watches/Clocks Shops in Shrewsbury Centre

	2001		2005		2009		2012	
	No	%	No	%	No	%	No	%
Jeweller/Watches/Clocks	18	2.8	19	3.0	26	4.1	28	4.2

*Percentage of Total Shops

6.6 Hair/Beauty Salon

Hair and Beauty Salons have increased rapidly since 2001, with the biggest change between 2001 and 2005 where there was an increase of 8 shops.

- From 2001 to 2012 there has been an increase of ten Hair/Beauty Salons in Shrewsbury Centre.

Figure 5.5: Hair/Beauty Salon Shops in Shrewsbury Centre

	2001		2005		2009		2012	
	No	%	No	%	No	%	No	%
Hair/Beauty Salon	29	4.5	37	5.9	36	6.7	39	5.9

*Percentage of Total Shops

7. Shop Types no longer in Shrewsbury Centre

It is important to note which business have historically had a presence within Shrewsbury Centre, but as of 2012 are closed or relocated. Figure 6 displays the shop types which had stores in Shrewsbury Centre, but have since 2001 closed down or relocated to different areas.

Figure 6: Shop Types no Longer in Shrewsbury Centre

Shop Type	Shop Code	2001	2012	Difference
Butcher	AB	1	0	-1
Leather Goods	HC	1	0	-1
Second Hand Dealer	SB	1	0	-1
Post Office	WG	1	0	-1

- The Post Office in Shrewsbury Centre closed however there is a post office in WHSmith. This is not classed as such as it is part of another business which shop type is classed as a Variety Store.

- There are no longer shops with a sole purpose dedicated to the sale of leather goods, second hand deals or butchers.

The loss of these shop types may not mean that this service is now no longer available in Shrewsbury, it may well be this service is provided by another shop. For example there are no longer recorded any Butchers in Shrewsbury Centre, however some of these products can be purchased from stores such as Waitrose, on the High Street.

8. New Shop Types in Shrewsbury Centre

Not only is it important to record what shop types are no longer present in Shrewsbury Centre but also to record shop types which are new. The below shop types have historically had no presence in Shrewsbury Centre but since 2009 have recorded one shop apiece.

Figure 7: New Shop Types in Shrewsbury Centre

Shop Type	Shop Code	2001	2012	Difference
Building/Plumbing	GA	0	1	1
Prams/Baby Goods	JB	0	1	1

- Salop Maintenance Limited is now operating within Shrewsbury Centre on Hills Lane and is the first shop of its type since before 2001. Twinkle Twinkle has also opened in Dogpole and the only dedicated baby/pram shop in Shrewsbury Centre.

9. Change of Use

The Change of Use of shops is a very informative tool in analysing the market towns. There are 162 shops have changed their use since 2009, this includes changes of ownership of the business or a change in the shop type. This means almost a quarter (24.4%) of total shops in Shrewsbury Centre have changed use or ownership at least once over the last three years. This is however reduced from the 222 (or 35.1%) of shops which changed their use between 2005 and 2009. It would appear that there is a relatively high turn over rate of businesses within Shrewsbury. Of the 162 shops which changed their use or ownership 25 became either vacant or residential, this means 25 shops are no longer economically active in Shrewsbury Centre.

- There are 10 shop premises which have been converted to residential properties including; Murivance Cottage Hairdressers, Bizarre and 8 previously vacant shop units.

- There are 15 shop units which have become vacant, including local shops such as; What Women Want, Purple Rain Jewellery, Revive Juice Bar, Sun City Tanning and Topcats.

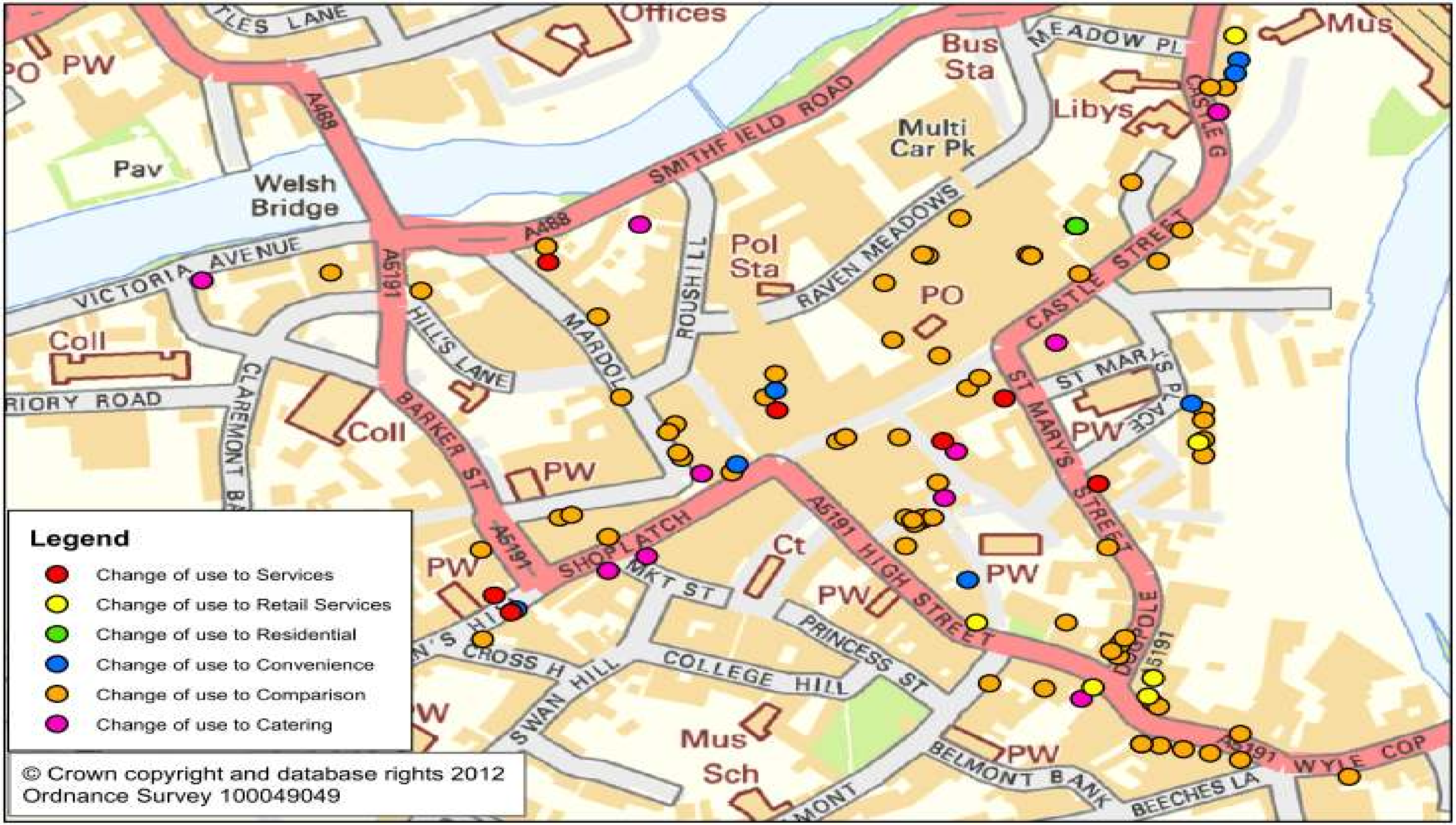
- There are 36 shop units which were vacant in 2009 and are now in use including local shops; Aveda the Salon, Shrewsbury Bakery, Ella. There are also national/international stores that have established a retail presence in Shrewsbury such as; Barnardo's, Little Waitrose and Gala Bingo.

Figure 8: Shop Unit Change of Use 2001-2012

	2001		**2005**		**2009**		**2012**	
	No	%	No	%	No	%	No	%
Change of Use	249	38.2	63	10.0	222	35.1	162	24.4

*Percentage of Total Shops

Figure 8.1: Shops Recorded as Changing Use between 2009 and 2012 Shop Survey



This map provides an overview of shops units which have changed their use since the 2009 survey. It is further broken down to show not only that the property has changed use, but also which shop category it has changed to. It is clear to see that the majority of shop units have changed their use to the Comparison category. See page 12 for Vacant shop unit locations.

10. Remaining Shops by Type

The table below shows the remaining changes in shop type identified in the 2012 Shops Survey. Shops types which have seen no change in shop units have not been identified.

Figure 9: Number of Shops by Type 2009-2012

Type of Shop	Type Description	Number of Shops 2009	Number of Shops 2012	Difference
AA	Baker	4	6	2
AF	Grocer	11	7	-4
AG	Off-Licence/Home Brew	3	5	2
BA	Sweets/Newsagent/ Tobacconist	8	11	3
CA	Footwear & Repair	15	14	-1
CC	Men & Boys Wear	14	15	1
CD	Women & Girls Wear	47	43	-4
CE	Draper/Haberdashery/ General Clothes	18	24	6
DA	Antiques	10	15	5
DB	Furniture	8	7	-1
DE	Soft Furnishings/Household Textiles	8	6	-2
EA	Art/Framers/Drawing Material	10	8	-2
EB	Books & Stationery	6	7	1
ED	Printing & Copying	4	3	-1
FD	Photographic	5	4	-1
HA	China/Glass/Pottery	2	1	-1
HB	Gifts/Fancy Goods/Craft	16	14	-2
HD	Kitchen Ware	3	2	-1
LA	Catalogue Showroom	2	1	-1
LB	Department Store	3	5	2
PC	Sports Goods	8	7	-1
PD	Toys	3	2	-1
TB	Health Salon	10	7	-3
UA	Dry Cleaner/Laundry	2	1	-1
WA	Bank/Finance House	10	11	1
WC	Building Society	6	5	-1
WE	Travel Agent	9	7	-2

Of the 27 shop types displayed 18 have seen a reduction in the number of shop units when compared to 2009, the remaining 9 have seen an increase. Though there has been change in many categories, the change has been minimal. Many shops have seen a reduction of only 1 unit with shop type Grocer and Women and Girls wear showing the largest reduction of 4 apiece. Contrary to this the majority of the 9 shops which saw an increase in 2012 had a larger than 1 increase in shop units. Draper/Haberdashery/ General Clothes and antiques saw the biggest increase of 6 and 5 respectively.

11. Gross Floorspace

11.1 Current Picture

The floorspace figures are updated from known developments identified from the council's Planning and Land Use Monitoring System (PLUMS). The Research and Intelligence team also used Goad information (copyright Experian 2012) for comparative purposes. Where possible, gross floorspace figures for shops within Shrewsbury Town were used, however not all shops identified in the 2012 survey included gross floorspace data. This means the below data is based on the data available for 573 shops at the time of the report and does not include data for all 656 shops within Shrewsbury Town. Though this data is not completely accurate it is useful in providing a general overview of the town.

Figure 10: Shrewsbury Centre Gross Floorspace 2012

Type of Shop	Gross Floorspace (m^2)	% Of Gross Floor Space	Number of Shops	Average Gross Floorspace (m^2) per Shop Unit
Catering	16,766	9.2	88	191
Comparison	113,538	62.3	337	337
Convenience	8,702	4.8	31	281
Retail Services	6,387	3.5	47	136
Services	16,077	8.8	46	350
Vacant	20,892	11.5	107	195
Total	182,362	100	656	

- The total gross floor space for Retail space in use for Shrewsbury Centre is 182,362m^2. This is an average gross floorspace of 318m^2 per shop, based on the 573 shops identified.

- The shop with the largest gross floorspace is Marks and Spencer, located in the Charles Darwin Centre, totalling 7,979 m^2.

- The largest Category with 113,538m^2 62.3% of the total gross floorspace for Shrewsbury Centre is Comparison. Considering this is the largest category in both shop unit numbers and gross floorspace it has only the second highest average gross floorspace per shop unit of 337m^2.

- The Services category has the fourth highest gross floorspace in Shrewsbury Centre. However, it has the highest average gross foorspace per shop unit of 350m^2. This would suggest that on average Services shop units are larger than Comparison shop units.

- The Vacant category has the second highest gross floorspace and number of shop units in Shrewsbury Centre. However, it has the third lowest average gross floorspace per shop unit. This would suggest that the majority of vacant premises in Shrewsbury Centre are relatively small when compared to other categories.

11:2 Comparison with the 2009 Survey

Every category has seen some change in percentage of gross floorspace. Figure 10.2 shows that Catering and Vacant categories have seen a reduction in percentage gross floorspace in comparison to 2009.

- The largest percentage increase in gross floorspace is the Comparison category with an increase of 5.1% in three years and now represents 62.3% of total gross floorspace.

- The largest decrease in percentage gross floorspace is the Vacant category with a reduction of 6.3% in three years and now represents 11.5% of total gross floorspace. This would appear to conflict with the number of Vacant shop units which has risen by 8 units since 2009. It would be reasonable to assume that with an increase in shop units the gross floorspace would correlate, however this is not the situation. This may well be due to larger Vacant shop units recorded in 2009 changing their use to another category by 2012. Even though there has been an increase in the number of Vacant shop units, these units may well be smaller shop units leading to the dramatic decrease in total gross floorspace percentage.

- This appears to have also occurred with the Catering category which despite an increase in eight shop units, has seen a reduction of 1.9% since 2009 and now totals 9.2% of total gross floorspace in Shrewsbury Centre.

Figure 10.1: Percentage of Gross Floorspace in Shrewsbury Centre 1979-2012

Percentage of Gross Floorspace for Shrewsbury Centre						
	Catering	**Comparison**	**Convenience**	**Retail Services**	**Services**	**Vacant**
Year	% Floor Space	% Floor Space	% Floor Space	% Floor Space	% Floor Space	% Floor Space
1979	4.7%	70.9%	9.3%	1.2%	10.7%	3.1%
1986	5.4%	68.5%	7.8%	1.4%	11.5%	5.3%
1993	7.1%	61.6%	6.2%	1.4%	10.9%	12.7%
1995	7.8%	59.7%	5.6%	1.5%	10.8%	14.6%
2001	9.5%	63.3%	4.5%	2.3%	10.5%	9.8%
2005	8.3%	66.2%	4.6%	2.8%	11.1%	7.0%
2009	11.1%	57.2%	3.8%	3.3%	6.8%	17.8%
2012	9.2%	62.3%	4.8%	3.5%	8.8%	11.5%

- Convenience, Retail Services and Services in Shrewsbury Centre have all increased their total percentage gross floorspace since 2009. With an increase of 1%, 0.3% and 2% respectively.

11.3 Historic Comparison

As to be expected there have been significant changes in gross floorspace since 1979. Comparisons to Historic Shops Surveys are useful to discover trends over the years and potentially to predict if there will be similar rises or falls in the future.

11.3.1 Comparison

The Comparison category has dominated all other categories since the first Shops Survey report in 1979 and follows a similar trend through all of Shropshire's Key Market Towns. It now accounts for 62.3% of all gross floorspace in Shrewsbury, this has decreased by 10.9% since 1979. This is understandably due to the development of other shops which do not fall within the Comparison category i.e. restaurants have grown rapidly within the Catering category.

11.3.2 Catering

Catering has also had a sharp increase since 1979; almost doubling in percentage Gross Floor space which now stands at 9.2%. This follows suit with the consistent increase in the number of Catering shop units in Shrewsbury Centre and the development of an 'eating out' culture.

11.3.3 Convenience

There has also been a significant drop in gross floorspace used by the Convenience category and has been in decline since 1979. Originally at 9.3% in 1979 Convenience shop units now total 4.8% of the Gross Floor space for Shrewsbury Centre. This is supported by the reduction of Convenience shop units since 1979 *(see page 9).* Despite this recorded decrease there is now a large supermarket located on Shrewsbury High Street. Little Waitrose has recently opened a store in the town.

11.3.4 Retail Services

Retail Services has seen a steady and consistent rise since 1979. With 1.2% of gross floorspace in 1979 it now represents 3.5% in 2012. Although this may not be the most impressive increase it is the only category to have not seen a reduction in the percentage of gross floorspace since records began in 1979.

11.3.5 Services

Services have seen a 1.9% drop in gross floorspace since 1979. It reached its peak in 1986 with 11.5% of floorspace, it has since declined to 8.8% in 2012. There has been little change in this category since 1979, however the decline in shop units could well be due to the increase in internet websites which provide the various services under this category. For example the growth in online holiday planning could attribute to the loss of Travel Agent shop types in the Services category.

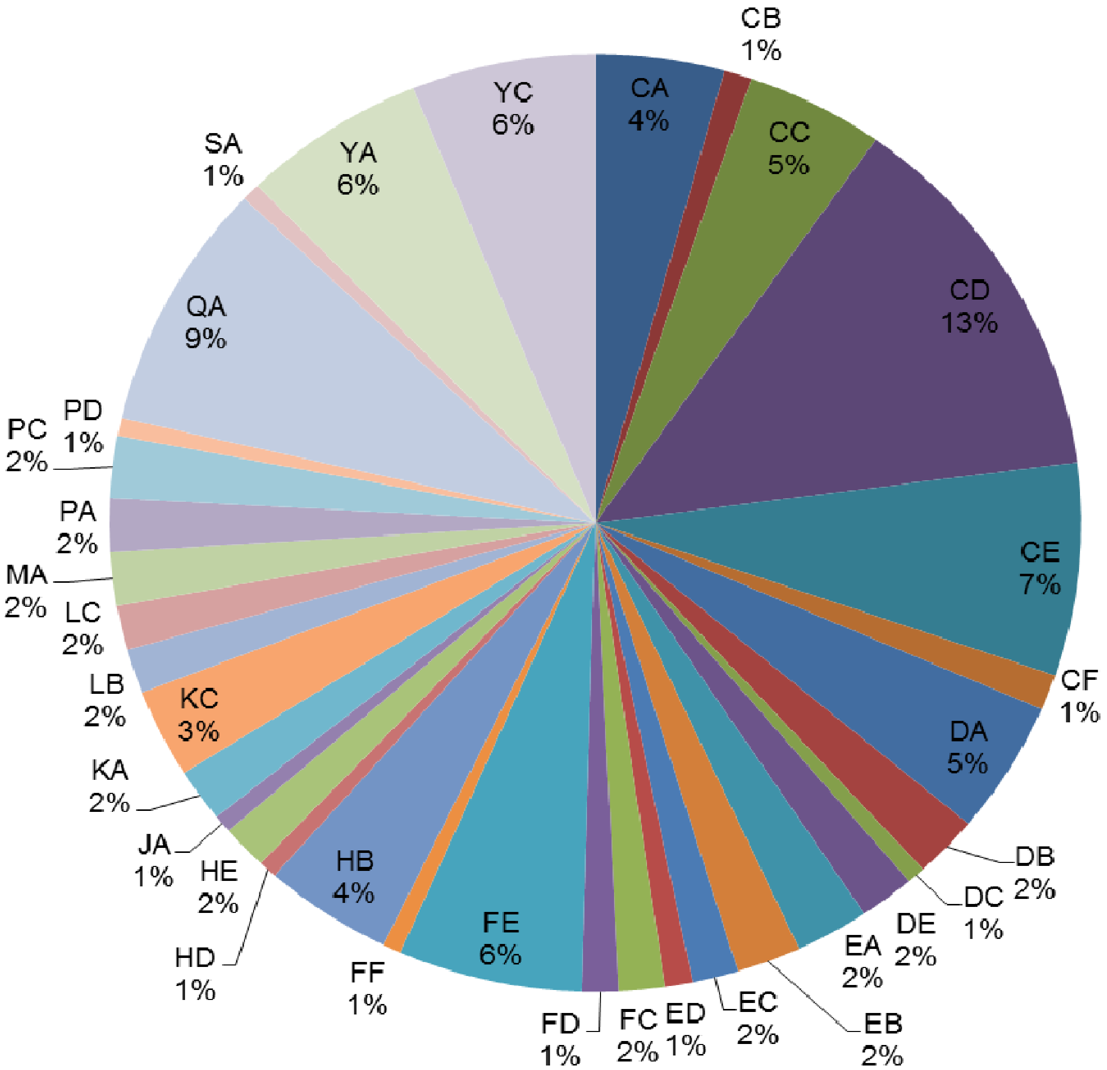
11.3.6 Vacant

There has been a steady increase of Vacant floorspace rising from 3.1% of the shops in 1979 for Shrewsbury Centre to 11.5% in 2012. This reflects the rise in retail units overall in Shropshire and increase fluidity of businesses on the High Street.

11.4 Comparison Category Breakdown by Shop Type

The Comparison category has dominated both the number of shop units and gross floorspace since the first Shops Survey report in 1979. Figure 10.2 provides a useful breakdown of the various shop types within the Comparison category to ascertain the driving force behind this dominance.

Figure 10.2: % Breakdown of Comparison Shop Types in Shrewsbury Centre by Gross Floorspace



*See Appendix 2 for full details on Shop Types

- Figure 10.2 indicates that the shop type CD (Women and Girls Wear) has the largest gross floorspace of all other shop types within the Comparison Category with 13%.

- There are 34 shop types recorded within Figure 10.2, however the majority of shop types represent very little in gross floorspace. The 8 shop types with the most floorspace represent 57% of gross floorspace for the Comparison category. These shops types are;
  CC – Men & Boys Wear,
  CD – Women & Girls Wear,
  CE – Draper/Haberdashery/General Clothes,
  DA – Antiques

FE – Radio/TV/Electrical,
QA – Jeweller/Watches/Clocks,
YA – Miscellaneous Retail, and
YC – Charity,

- The large representation of shop type's FE, QA and YC has been discussed on pages 13-15.

- Figure 10.2 shows how shop type's CC, CD and CE are responsible for just over 25% of Comparison gross floorspace. We can assume that Shrewsbury Centre has a large showing of clothing and fashion stores, particularly Women and Girls wear. This is supported by the increase in shop units for male and boys wear and general clothes and although Women and Girls wear reduced shop units by 4 it still represents 43 shop units.

- There has been a sharp increase in Antique (DA) shop units since 2009, this would account for the increase in gross floorspace which now represents 5%. It could also be assumed, by the very nature of antique shops potentially selling furniture or other large items, that the average gross floorspace of each shop will be larger than other shop types.

- Shops are classified as Miscellaneous Retail if they have no clear primary purpose or function, for example a shop unit which sells a variety of products ranging through various shop types. Miscellaneous Retail is also classified if the product or service sold in the shop is not classified by on existing shop type. Within Shrewsbury Centre there are very few shops classified as Miscellaneous Retail, however the Market Hall on Shoplatch is classified as such and is the reason behind the large gross floorspace representing 5,079m^2 or 4.5% of Comparison category gross floorspace. Due to the variety of shop stalls within the Market Hall it is not possible to determine a 'primary function or service' and as such is classified as Miscellaneous. The shop stalls within the Market Hall are not surveyed in keeping with previous Shops Surveys.

12. Conclusion

Retail development has increased since the previous 2009 Shops Survey, with a further 23 shop units total identified in 2012. Retail activity peaked in 1995 when there were 717 shop units; it is unlikely this total will be reached again even when the economic climate improves. This is due both to national trends which point to a continued tendency to shop either on-line or in out-of-town shopping centres but also due to the nature of Shrewsbury Centre being surrounded by the River Severn, which means that development is inherently limited. A £150 million investment is being made into the redevelopment of Riverside Mall. This will aid in attracting businesses to the town, with Debenhams already confirming a store will be opened in the new mall. This is likely to be accompanied by the increased development of residential flats within Shrewsbury Centre, for example on Mardol.

The look of the High Street is changing and there has been a marked change in the retail offer within Shrewsbury Centre since 1979 with certain shop types increasing in popularity and others falling by the wayside. Catering outlets now account for a substantially larger share of retail units than they used to, particularly restaurant and takeaway shops. A growing trend for 'eating out', not only for evening meals, but also breakfast and lunch, has been in evidence, and coffee and sandwich bars have capitalised on this popularity. There has also been a reduction in the number of Convenience shops within Shrewsbury Centre. Already noted in this report is the trend for Convenience shops to be located out of the town in more residential areas. While the bulk of convenience retail expenditure is attributable to large out-of-town or small, residential supermarkets some supermarket chains are bucking the trend, with some small supermarket outlets emerging (for example Little Waitrose in Shrewsbury) in and around town centres. Supermarkets can provide an array of products and are in a financial position to charge less than small independent retailers, and as such provide fierce competition to the traditional small grocers *(see page 13)*. The 2012 Shrewsbury centre shop survey notes the absence of many traditional convenience retailers, including butchers and fishmongers.

There has also been a dramatic increase in the number of outlets occupied by Retail Services since 1979. Rising 135% from 1979 to 2012, Retail Services now occupy 47 shop units; the vast majority (39) of these are occupied by Hair and Beauty shop types (TA). This has been a growing trend in recent years as Hair and Beauty shop types only accounted for 29 shops in 2000.

The Vacancy rate is at its highest since 1995, though in real terms this is due to a large increase in vacant shop units between 2001 and 2005. Since the last survey, the number of Vacant shop units has risen by just 0.7%. In context this is the smallest variation between Shops Survey reports since records began. There is also evidence that some businesses, both large and independent retailers, are investing in shop units in Shrewsbury Centre with 35 shop units categorised as Vacant in 2009 having been filled by 2012. Also as mentioned *above*, there will be a £150 million investment in the redevelopment of Riverside Mall.

There has been a lot of dialogue about the growing trend for online shopping, the global recession, inflation and interest rates and how this may affect businesses and High Streets across the nation. The Mary Portas report, along with other reports *(see page 13),* make recommendations on the economics and revitalisation of High Streets. This Shops Survey report does not provide specific information on the current economic position of businesses, although the empty shop rate is a useful barometer on the health of the High Street. As already noted in this report, the Vacancy rate of retail units slowed to 0.7% in the last three years and is on a par with the vacancy rate nationally. To some extent the rise in Vacant shop units has been offset by a net increase since 2009 of15 shop units in other economically active categories However, retail business remain under immense pressure given the severity of the economic situation and other factors impacting footfall on High Streets.

Appendix 1

Below are links which can provide further and specific knowledge of Shrewsbury;

- **Shrewsbury Centre 2009 Shops Survey –**
  Provides details from the 2009 Shops Survey of the 18 Key Market Town and Centres. Further information is provided on how the surveys are carried out.
  http://www.shropshire.gov.uk/factsfigures.nsf/open/C4EB69C9C7C8ECFD80256CC400419A97

- **Shrewsbury Place Plan –**
  A place plan has been prepared specifically for Shrewsbury and its surrounding hinterland to identify the priorities for investment and infrastructure within the local area.
  http://www.shropshire.gov.uk/planningpolicy.nsf/open/87EA3F9BDDD9D7F480257922004CC917

- **Shrewsbury Market Town Support –**
  Shrewsbury is one of 29 original new growth points in the UK and has been awarded £5 million by the Government for infrastructure projects to develop the historic town of Shrewsbury. This will include significant housing provision and creating a focus for employment, facilities and services.
  http://www.shropshire.gov.uk/economicdevelopment.nsf/open/E6B7D21EA3C063EE802577B5004D463A

- **2001 Census Wards–**
  They contain summary data for the former district electoral wards in Shropshire along with data for England, the West Midlands region, Shropshire and the former local authority districts within Shropshire.
  http://www.shropshire.gov.uk/factsfigures.nsf/open/55849D1AB89EA51C80256E3C0037FFD2

- **Shrewsbury Town Council –**
  The history of Shrewsbury Town and information about the local council.
  http://www.shrewsburytowncouncil.gov.uk/live/welcome.asp?id=314

- **National trend on High Street Retailers-**
  Provides information on retailers who have suffered on the High Street.
  http://www.bbc.co.uk/news/business-13977255

- **The Portas Review –**
  An independent review on the future of our high streets.
  http://www.maryportas.com/news/2011/12/12/the-portas-review/

- ***Understanding High Street Performance***
  Department for Business, Innovation and Skills/Genecon and Partners (2011)

- **Core Strategy submission evidence base**
  A wide range of evidence is being considered as a new Local Development Framework is prepared for Shropshire Council. This evidence comes from a variety of sources at the national, sub-regional, regional and local levels and has recently been used in the preparation of the Core Strategy DPD, which was submitted to the Secretary of State for Examination on 30 July.
  http://www.shropshire.gov.uk/planningpolicy.nsf/open/A96738975CC26F0E80257922004CC8F2

- **New Riverside Development**
  Information on the proposed devlopment of the Riverside Mall.
  http://www.newriverside-shrewsbury.co.uk/

Appendix 2

Shop Categories

Category	Category Name	Store Type	Store Type Name	Shop Type	Shop Type Name
AA	Baker	A	Food	A	Convenience
AB	Butcher	A	Food	A	Convenience
AC	Dairy	A	Food	A	Convenience
AD	Fishmonger/Poulterer	A	Food	A	Convenience
AE	Greengrocer/Fruiterer	A	Food	A	Convenience
AF	Grocer	A	Food	A	Convenience
AG	Off-Licence/Home Brew	A	Food	A	Convenience
BA	Sweets/Newsagent/Tobacconist	B	Newsagent	A	Convenience
CA	Footwear & Repair	C	Clothes	B	Comparison
CB	Knitting Yarns	C	Clothes	B	Comparison
CC	Men & Boys Wear	C	Clothes	B	Comparison
CD	Women & Girls Wear	C	Clothes	B	Comparison
CE	Draper/Haberdashery/General Clothes	C	Clothes	B	Comparison
CF	Children's Wear	C	Clothes	B	Comparison
DA	Antiques	D	Furniture	B	Comparison
DB	Furniture	D	Furniture	B	Comparison
DC	Floor coverings	D	Furniture	B	Comparison
DE	Soft Furnishings/Household Textiles	D	Furniture	B	Comparison
EA	Art/Framers/Drawing Material	E	Stationery/Books	B	Comparison
EB	Books & Stationery	E	Stationery/Books	B	Comparison
EC	Greetings Cards	E	Stationery/Books	B	Comparison
ED	Printing & Copying	E	Stationery/Books	B	Comparison
EF	Office Equipment	E	Stationery/Books	B	Comparison
FA	Gas Appliances	F	Electrical/Gas Goods	B	Comparison
FB	Lights & Lighting	F	Electrical/Gas Goods	B	Comparison
FC	Music	F	Electrical/Gas Goods	B	Comparison
FD	Photographic	F	Electrical/Gas Goods	B	Comparison
FE	Radio/TV/Electrical	F	Electrical/Gas Goods	B	Comparison
FF	Records/Tapes/Videos	F	Electrical/Gas Goods	B	Comparison
GA	Building/Plumbing	G	DIY/Hardware	B	Comparison
GB	Ironmonger/Hardware/DIY	G	DIY /Hardware	B	Comparison
GC	Wallpaper/Paint	G	DIY /Hardware	B	Comparison
GD	Heating	G	DIY /Hardware	B	Comparison
HA	China/Glass/Pottery	H	China/Gifts	B	Comparison
HB	Gifts/Fancy Goods/Craft	H	China/Gifts	B	Comparison
HC	Leather Goods	H	China/Gifts	B	Comparison
HD	Kitchen Ware	H	China/Gifts	B	Comparison
HE	Household Toiletries	H	China/Gifts	B	Comparison
JA	Cycles/Motor Cycles	I	Cycles/Motor Accessories	B	Comparison
JB	Prams/Baby Goods	I	Cycles/Motor Accessories	B	Comparison

Shop Categories					
Category	**Category Name**	**Store Type**	**Store Type Name**	**Shop Type**	**Shop Type Name**
JC	Motor Accessories	I	Cycles/Motor Accessories	B	Comparison
KA	Chemist	J	Chemist/Optician	B	Comparison
KB	Surgical Goods	J	Chemist/Optician	B	Comparison
KC	Opticians	J	Chemist/Optician	B	Comparison
LA	Catalogue Showroom	K	Department/Variety	B	Comparison
LB	Department Store	K	Department /Variety	B	Comparison
LC	Variety Store	K	Department /Variety	B	Comparison
MA	Florist	L	Florist	B	Comparison
MB	Nursery/Garden Supplies	L	Florist	B	Comparison
MC	Agricultural Merchant	L	Florist	B	Comparison
NA	Restaurant/Cafe/Takeaway	X	Restaurant	X	Catering
NB	Public House	1	Exclude	1	Exclude
PA	Hobby	M	Toys/Sports	B	Comparison
PB	Sewing Machines	M	Toys/Sports	B	Comparison
PC	Sports Goods	M	Toys/Sports	B	Comparison
PD	Toys	M	Toys/Sports	B	Comparison
QA	Jeweller/Watches/Clocks	N	Jewellers	B	Comparison
RA	Pets & Pet Supplies	O	Pets/Pet Supplies	B	Comparison
SA	Camping/Government Surplus	P	Camping Equipment	B	Comparison
SB	Second Hand Dealer	S	Second Hand	B	Comparison
TA	Hair/Beauty Salon	T	Hair/Beauty	T	Retail Services
TB	Health Salon	T	Hair/Beauty	T	Retail Services
UA	Dry Cleaner/Laundry	U	Dry Cleaners	T	Retail Services
WA	Bank/Finance House	W	Services	W	Services
WB	Betting Shop	W	Services	W	Services
WC	Building Society	W	Services	W	Services
WD	Estate Agent	W	Services	W	Services
WE	Travel Agent	W	Services	W	Services
WF	Insurance	W	Services	W	Services
WG	Post Office	W	Services	W	Services
XA	Cinema/Theatre/Amusement	1	Exclude	1	Exclude
YA	Miscellaneous Retail	Q	Miscellaneous	B	Comparison
YB	Vacant/Under Construction	Z	Vacant	Z	Vacant
YC	Charity	R	Charity	B	Comparison
YD	Garage/Showroom/Tyres	1	Exclude	1	Exclude
ZZ	Non Retail or Service Use	Y	Non Retail	1	Exclude
00	Residential				