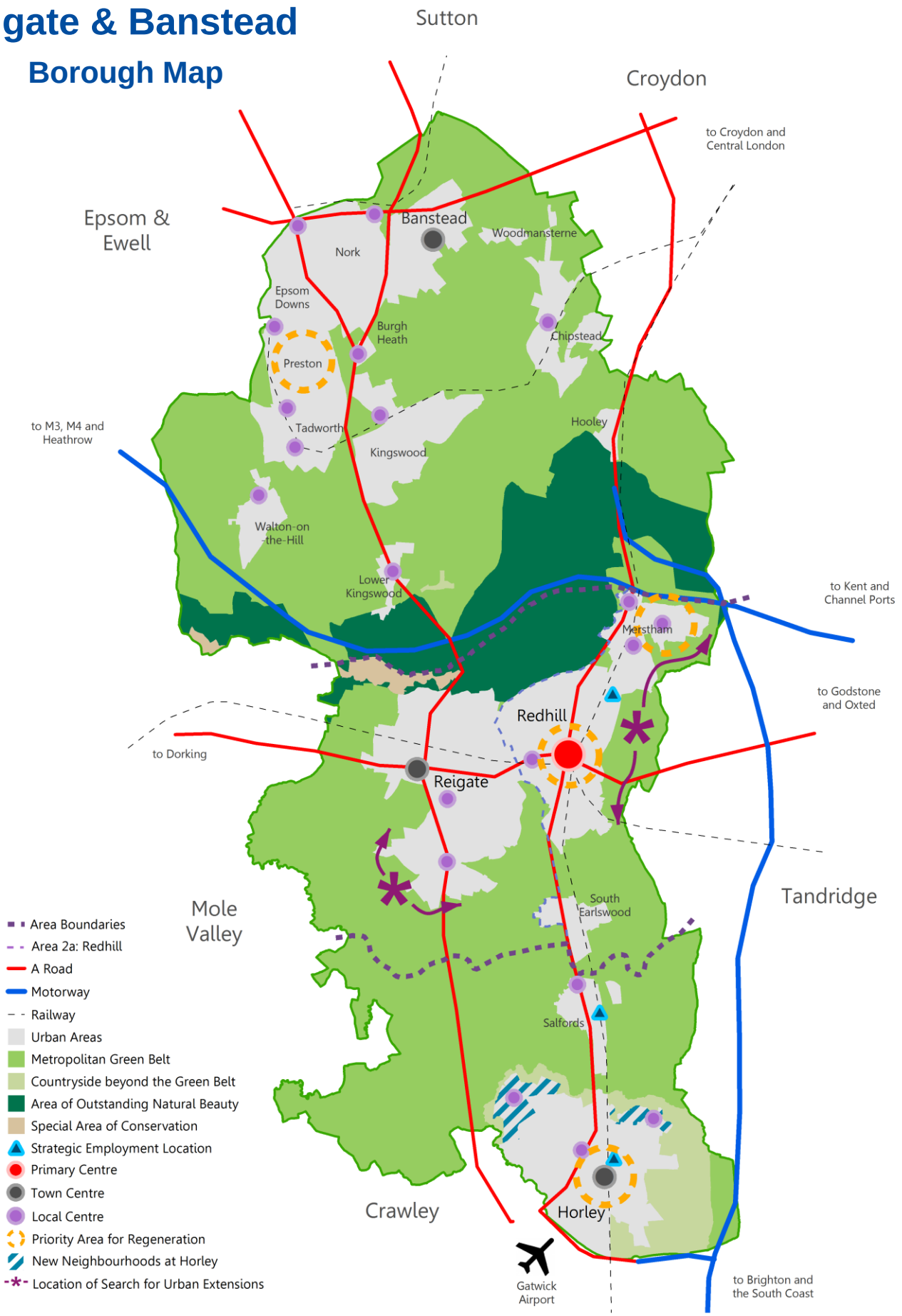
Town Centre Monitor

Position in March 2013

Reigate & Banstead
BOROUGH COUNCIL
Banstead | Horley | Redhill | Reigate

Reigate & Banstead

Borough Map



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Please Note:
The information contained within this monitor provides is only a record of the observed current uses and occupiers present within the four main town centres in Reigate & Banstead at around the end of March 2013. It does not constitute a record of the Lawful Uses of each property under Sections 191 and 192 of the Town and Country Planning Act 1990 (as amended). For further information on lawful uses, please contact Building & Development Services.

While every care has been taken to ensure that the information in this monitor is accurate, the Borough Council accepts no responsibility for any errors or omissions. We would be grateful if our attention was drawn to any inaccuracies so that they might be corrected. Similarly, any suggestions that would make the information more useful would be gratefully received.

Introduction

This borough's town and district centres provide the focus for retail, service and leisure provision to serve the needs of visitors from within the borough and beyond. The purpose of monitoring town and district centres is to:

- Analyse use class and vacancy trends to assess the diversity, vitality and viability of provision within these areas;
- Monitor relevant local policies contained within the Borough Local Plan, namely policies Sh1, Sh7 & Sh8 and emerging Core Strategy and Development Management Plan (DMP).
- Monitor the progress of new developments and regeneration schemes; and
- Provide a robust and up-to-date evidence base to assist in plan-making and decision-taking on planning applications within town centres.

The analysis focusses on the retail frontage within each of the centres; however, uses at upper floors and elsewhere within the boundary of the town centre also make a valuable contribution to the functioning and vitality of the town centres. Full schedules of the occupiers within the retail frontage for each of the centres is available by contacting the Planning Policy Team on 01737 276000 or by emailing LDF@reigate-banstead.gov.uk.

Future Policy Developments

The Borough Local Plan 2005, including its saved policies, is in the process of being replaced by new local planning documents. The Council submitted its Core Strategy in May 2012. Following feedback from the Planning Inspector, the Council carried out some additional work which resulted in amendments to the document. The revised documents were submitted to the Inspector in March 2013 and a hearing date has been set commencing on Tuesday 14th May 2013 and will run for 2 weeks.

Policies relating to the management of development within town centres will be contained within the Development Management Policies (DMP) which is currently being prepared. Redhill will now be included in the emerging DMP. In the interim, this monitor will continue to assess performance against saved policies Sh1, Sh7 & Sh8.

Relevant Local Policies and Indicators

Policy	Monitoring Target
Sh1	Improve shopping provision within Town Centre Shopping Areas and resist the loss of existing or proposed retail floorspace
Sh7	Resist the loss of A1 retail frontage within Primary Shopping Areas of Reigate and Redhill Town Centres unless the proportion is above 80%; and the same within Secondary Shopping Areas unless the proportion is above 66%
Sh8	Resist the loss of A1 retail frontage in Banstead Village and Horley Town Centre unless the proportion is above 75%.
Core Strategy	Significant effects indicator – vacancy rates in town centres (units) – target 5%

The guidance and the policies are available under Planning Policies on the Council's web site:

http://www.reigate-banstead.gov.uk/planning

Retail Hierarchy

Town centres are of varying sizes and perform different roles within a retail context. The emerging Core Strategy recognises that:

- **Redhill Town Centre –** is the primary town centre and focus of future leisure, office and comparison retail growth due to its role as a Regional Hub and strong transport links.
- **Reigate Town Centre –** is the secondary town centre, serving as a convenience destination with a strong range of independent and specialist retailers.
- **Banstead Village** – provides a convenience role to its local catchment
- **Horley Town Centre** – provides a convenience and service role for its local catchment and is the focus of regeneration to accommodate increased demand from the new neighbourhoods

Town Centre Retail Composition

There are 563 units in the borough's four town centres. Together, these units provide a total net retail floorspace of almost 90,000 sqm and have a frontage length of more than 5,390 metres.

In terms of floorspace, once again almost half (45%) is in Redhill, highlighting its position as the borough's primary town centre. Reigate has 22% of the floorspace followed by Horley (19%). Banstead is the borough's smallest town centre and accounts for 14% of the total retail floorspace. Just over 30% of units are located in Reigate Town Centre with a similar proportion in Redhill Town Centre. The remainder are split relatively evenly between the two smaller town centres at Banstead and Horley.

Figure 1 Distribution of Town Centre Units & Floorspace

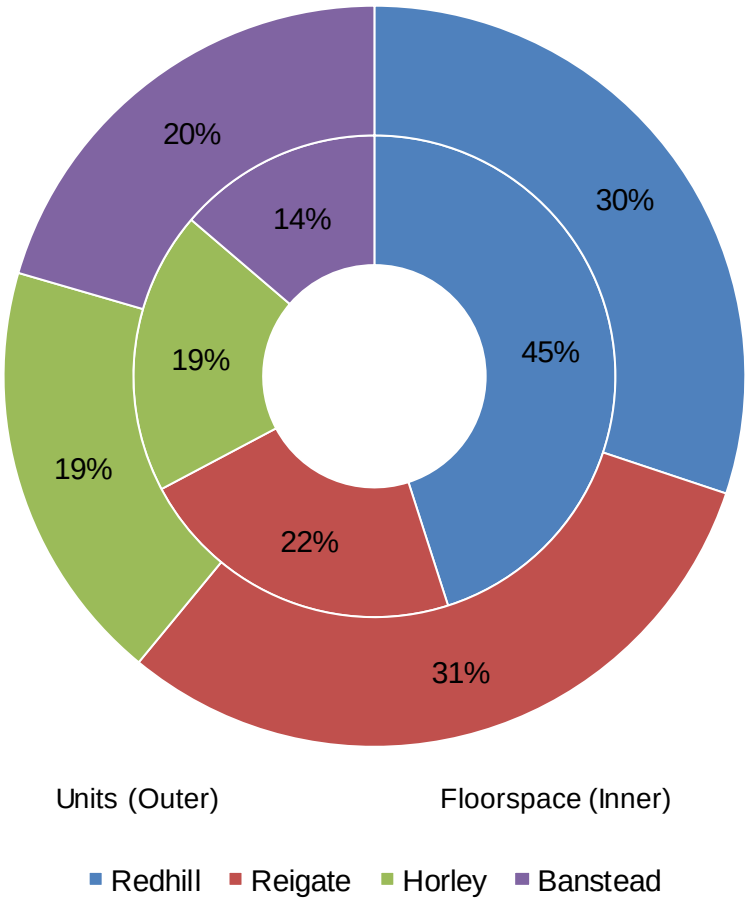
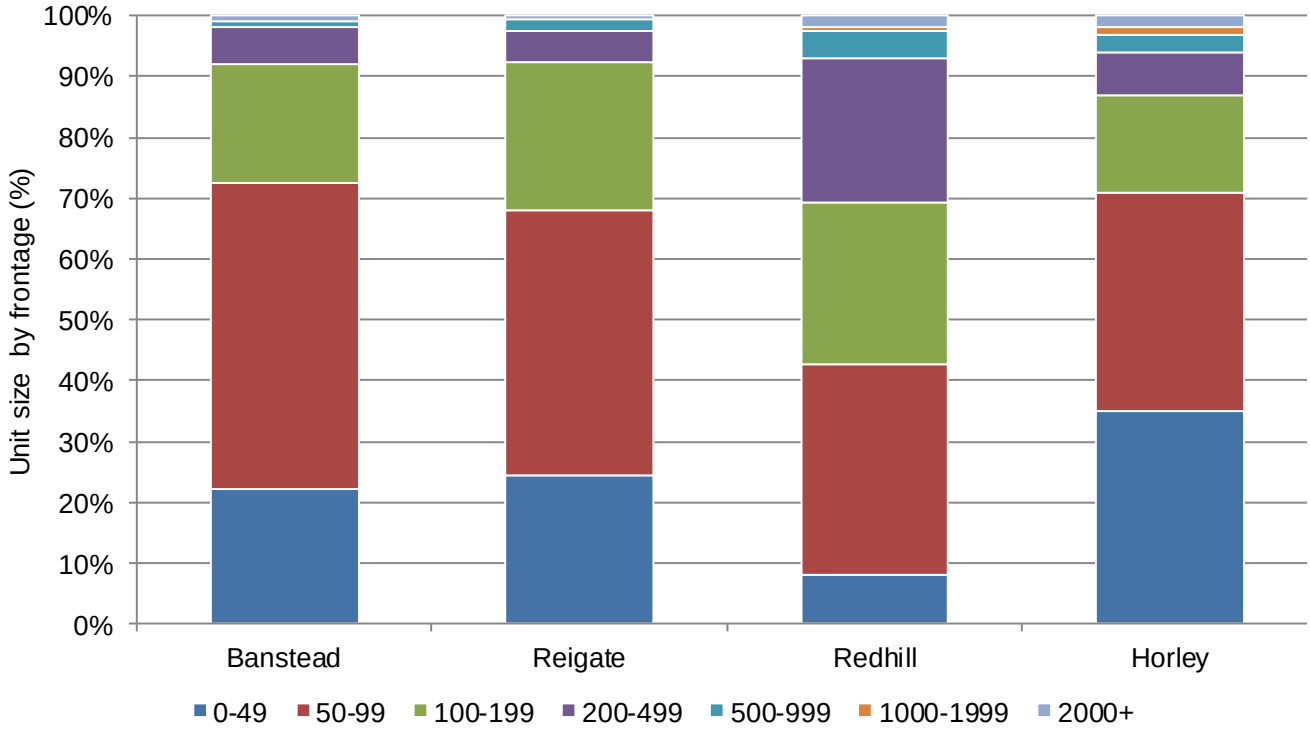


Figure 2 below shows the variation across the borough's 4 town centres, in terms of unit size (as determined by net retail floorspace). It is therefore not surprising that Redhill has the highest percentage of retail units at 100sqm or larger accounting for 57% of all units, given the centre is a major retail destination in the borough. The other 3 town centres (Banstead, Reigate & Horley) are predominately made up of smaller units under 100sqm at 73%, 68% and 71%, respectively. This largely reflects their valued characteristics which clearly has an impact upon their retail unit size. As evident in Reigate the borough's second largest town centre, of which a large proportion is occupied by small boutiques, coffee shops and restaurants.

Figure 2 Breakdown of Town Centre Units by Frontage Length



Overall Trends – Key Messages

National Retail Trends

The latest figures published by the British Retail Consortium shows there were approximately 189,280 VAT registered retail enterprises in the UK in 2012, operating in 287,100 retail outlets. Both figures show an increase in the total number of VAT registered businesses and operating retail outlets compared to 2011. Total sales for 2012 were over £311 billion, an increase from 2011 figures. Despite this growth over the past year, the long term predictions for the retail world remain uncertain. What's more, 9% of sales over the last year came from internet based purchases, demonstrating the increasing pressure and competition facing retail on the High Street.

Research by the Local Data Company (LDC) shows that the retail industry remains under pressure. Over the past year, more large multiple retailers have closed including Blockbuster and JJB.. With continuing retail failures, prime retail voids have increased further. Over the past 7 years, the vacancy rate has more than doubled and currently stands at 16.3%.The knock on impact for vacant floorspace is an increase from 9% in October 2011 to 13.2% in October 2012. Nevertheless this provides the opportunity for more financially stable retailers to take advantage of these vacant units. There has however been a significant drop in the number of retail units vacant for more than 12 months in the last 5 years down from 53.6% in 2008 to 27.1% in 2012, possibly as a result of increasing attempts on the part of landlords to encourage short term and 'pop-up' style uses in order to minimise the financial burden of vacant units.

According to the latest figures published by ONS, the non-food retail sector saw the biggest decrease in sales figures by 2.6% when compared with March 2012. This is largely as a result of the prolonged cold weather at the start of 2013 with consumers choosing to spend online rather than in store. Total spending in the retail sector increased by 0.1% between March 2012 and March 2013. The majority of which came from food stores where spending increased by 3.2%, despite an increase of 3% in the price of all goods sold in this sector. Conversely, non-food retail saw a decrease in both the amount spent and bought in this sector by 3.7% and 2.6% respectively compared to March 2012.

Borough Key Messages

- **Vitality:** A1 retail remains the main use within the borough's town centres; however, the proportion in all four town centres is below the required level set out in Policy Sh8 of the Local Plan. In the last 6 months there has been a slight decrease in premises such as cafés, bars, pubs and restaurants within the town centres, with over 13% of units currently in A3-A5 use. All four of the borough's town centres have a proportion of A1-A5 retail in excess of 96%.
- **Retail Uses:** Comparison retail still makes up 38% of units within the borough's four town centres. The majority of this comparison retail is clothing, footwear and accessories premises, which occupy more than 13% of the total retail units. The composition of each of the town centres suggests they are well matched to fulfill their individual role within the hierarchy as evident in Banstead and Horley, which have a higher proportion of convenience and service based retail, whilst Reigate and Redhill have predominately comparison based retail.
- **Vacancy Rate:** In terms of units, the current vacancy rate across all four town centres is 6.2% (35 units) a slight decrease from 6.3% in the previous period. Once again Banstead & Reigate are the only town centres to meet the borough's 5% vacancy target, with vacant units in Banstead falling significantly in the last 6 months from 5 down to 2 units (1.7%). Horley has seen a further increase in the number of vacant units up to 8.7% over the past six months, as a result of some larger retail units becoming vacant such as Cooks (electrical). Redhill continues to have the highest vacancy rate at 11.2%. In terms of floorspace, the

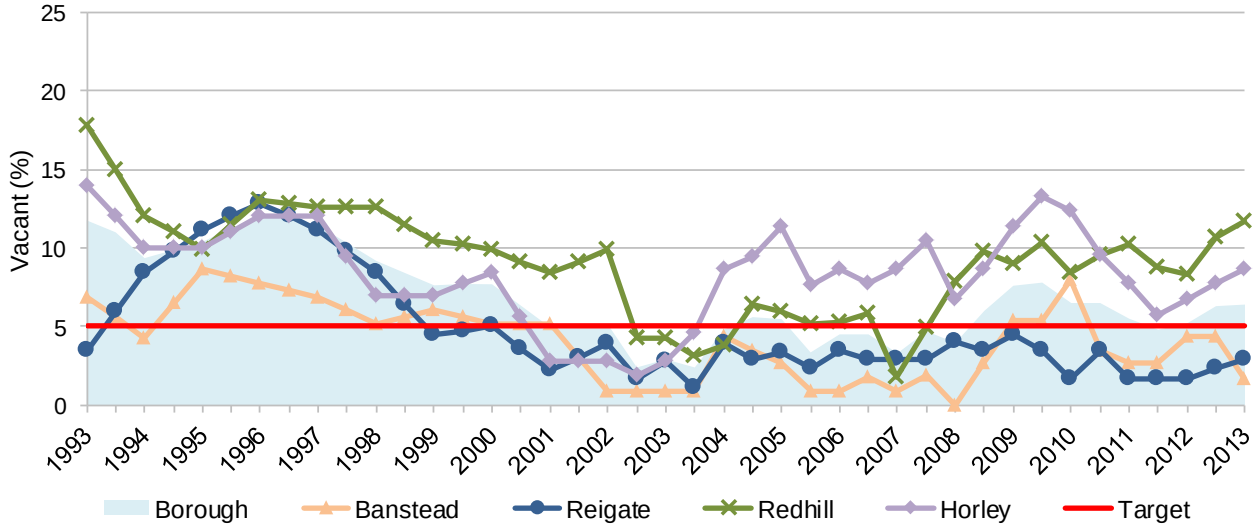
overall vacancy rate is 4.2% (3,720sqm) and vacant frontage is 6.4%

- **New Occupiers:** The total number of new occupiers moving into premises in one of the four town centres has stayed at 22. Horley had the highest number of new occupiers at 7, closely followed by Reigate with 6 new occupiers.

Vacancies & New Occupiers

Vacancy Trend

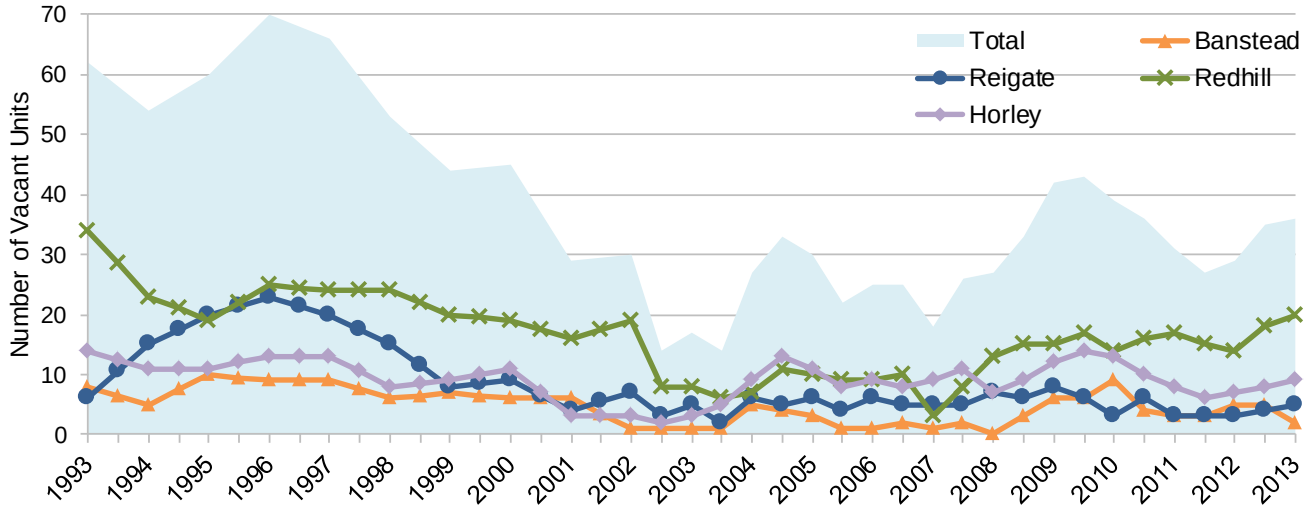
Figure 3 Percentage Vacancy Rate (1993-2013)



The overall town centre vacancy rate across the borough has decreased over the past 6 months, from 6.3% down to 6.2% in March 2013. Furthermore, in spite of the ongoing challenges facing High Street retail, the level of vacancy in each of the borough's four town centres is still below the national average. Since the last monitoring period, Banstead has seen a significant drop in vacancy rates down to 1.7% the lowest vacancy rate of all of the town centres. Conversely, Horley, Redhill and Reigate all saw an increase in total vacancy rates over the past six months, largely reflecting the loss of several larger retailers from the borough's town centres, including Blockbusters, Jessops and Mothercare.

Banstead and Reigate town centres both remain below the borough's 5% vacancy rate target and have done for the past 3 years.

Figure 4 Number of Vacant Units (1993-2013)



As with the overall vacancy rate, the total number of vacant retail units has also increased slightly over the past six months, rising by 1 unit to a total of 35. The most noticeable change was in Banstead where vacant retail units dropped down to 2 units. However Redhill, Reigate and Horley all saw an increase in total vacant retail units, with Redhill continuing to have the highest number of vacant units at 19. This needs to be monitored carefully; however, with a number of major developments coming on stream shortly as part of the towns regeneration, fortunes may improve over the next couple of years.

It is also important to consider the length of vacant frontage within the town centres as vacant units with a large frontage will arguably have a disproportionate visual impact upon the town centre. Since the last monitoring period total vacant ground floor frontage has dropped from 7.0% down to 6.4%.

In total there is currently around 3,720sqm of vacant retail floorspace across the borough's 4 town centres a significant drop since the previous monitoring period (5,600sqm). Redhill town centre has the highest amount of vacant retail floorspace at 7%, most of which are larger retail units located in the Belfry shopping centre. Table 1 below summarises the overall town centres vacancy position.

Table 1 Summary of Current Vacancy Position

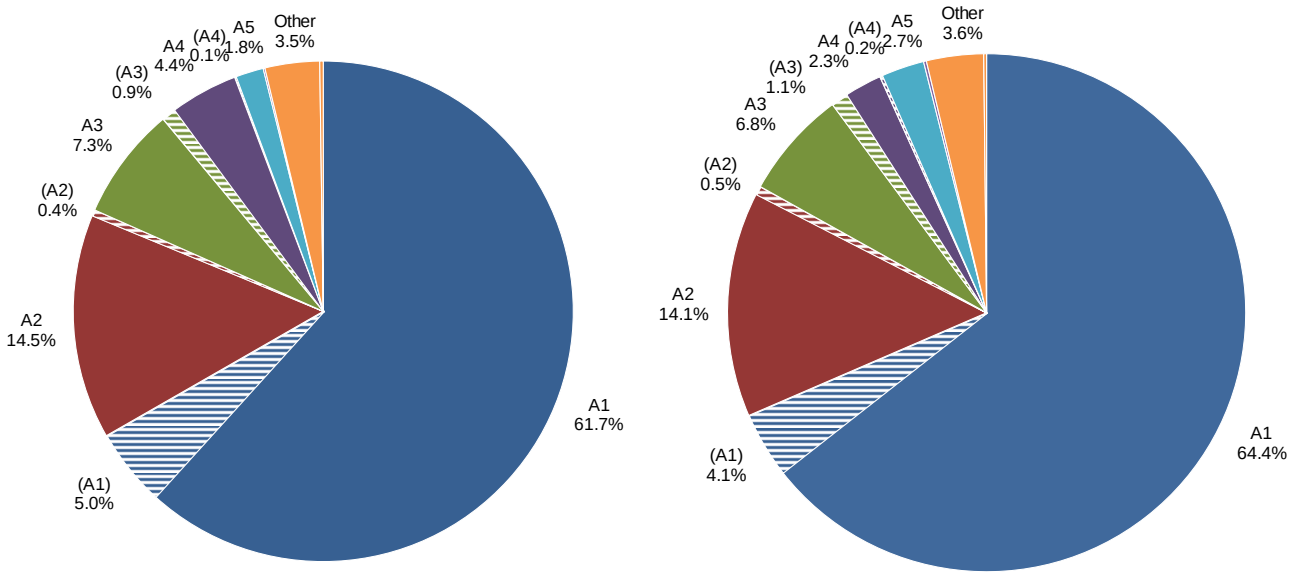
	Total	Vacant	Vacancy Rate
Units/Premises (No.)	563	35	6.2%
Frontage (Metres)	5,349	350	6.4%
Floorspace (Sqm)	88,919	3,720	4.2 %

Use Classes

Maintaining an appropriate mix of uses is essential to protecting and enhancing the vitality and viability of the borough's town centres and ensuring that they continue to meet resident and visitor demands. In particular, the promotion of A1 uses and resistance of excessive change away from core retail uses is a key objective of local policy (Sh1, Sh7 & Sh8).

In terms of units, 96.5% are in the main retail use classes (A1 to A5) and A1 use alone accounts for almost 67% of premises.

Figure 5 Use Class Composition (Left – Frontage; Right – Units)



Combined, A1-A5 uses represent 96.5% of total shopping frontage across the borough's four town centres. A1 uses makes up the majority, at around 69% of the total retail frontage whilst the proportion of total shopping frontage occupied by A3- A5 uses represents around 15% of the total.

'Other' typically non-retail uses account for 3.5% of ground floor retail frontage in the borough's town centres.

In terms of units, A1 use is again dominant, representing more than two-thirds of all units. Service type (A2) units account for around 15% of units and A3-A5 uses make up 13%.

Figure 6 A1 Retail in Town Centre Units

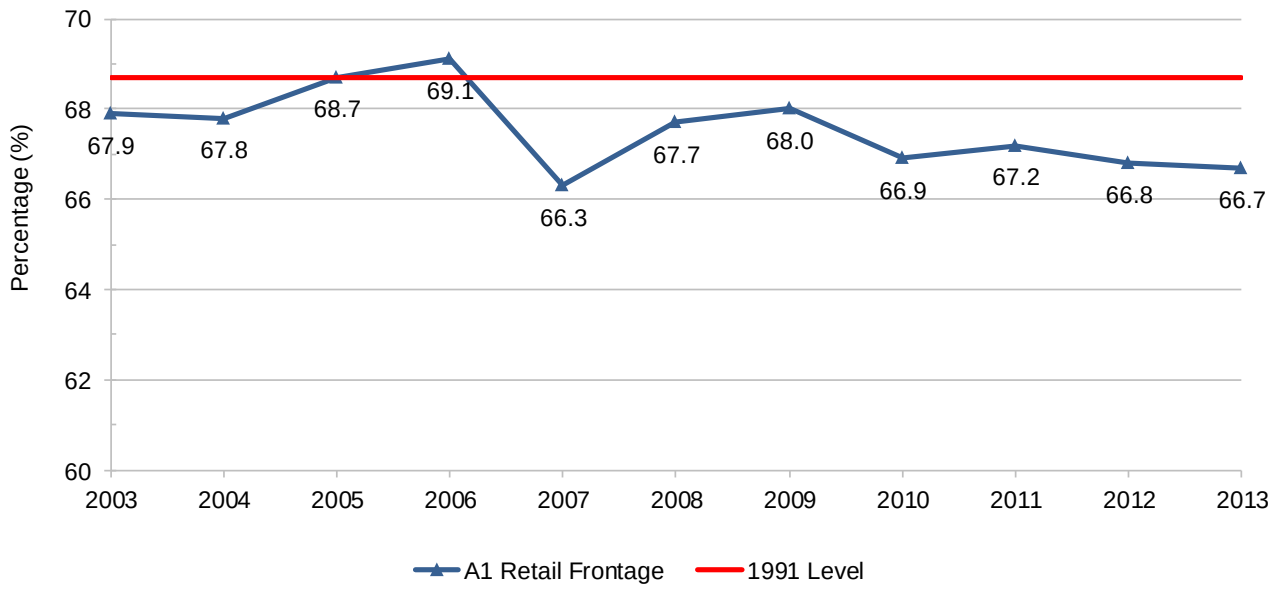


Figure 6 demonstrates that on the whole policies aimed at protecting against excessive loss of A1 premises in town centres have been successful. In 1991, A1 represented almost 69% of total frontage across the four town centres and, although there have been some slight movements over the years; this proportion has broadly been maintained and currently stands at almost 67%.

Retail Offer

In addition to use classes, it is useful to analyse the 'offer' which is provided across the town centres as this perhaps provides a better indication of the types of shops and services which are available.

Across the four town centres, comparison retail remains the dominate offer accounting for 38% of all retail units and around 42% of net retail floorspace. These figures show little change in comparison retail offer over the last six months. However, there has been a drop in service and food & drink leisure retail offer across the four town centres due to an increase in total comparison units (215) and floorspace (41.5%), compared to September 2012.

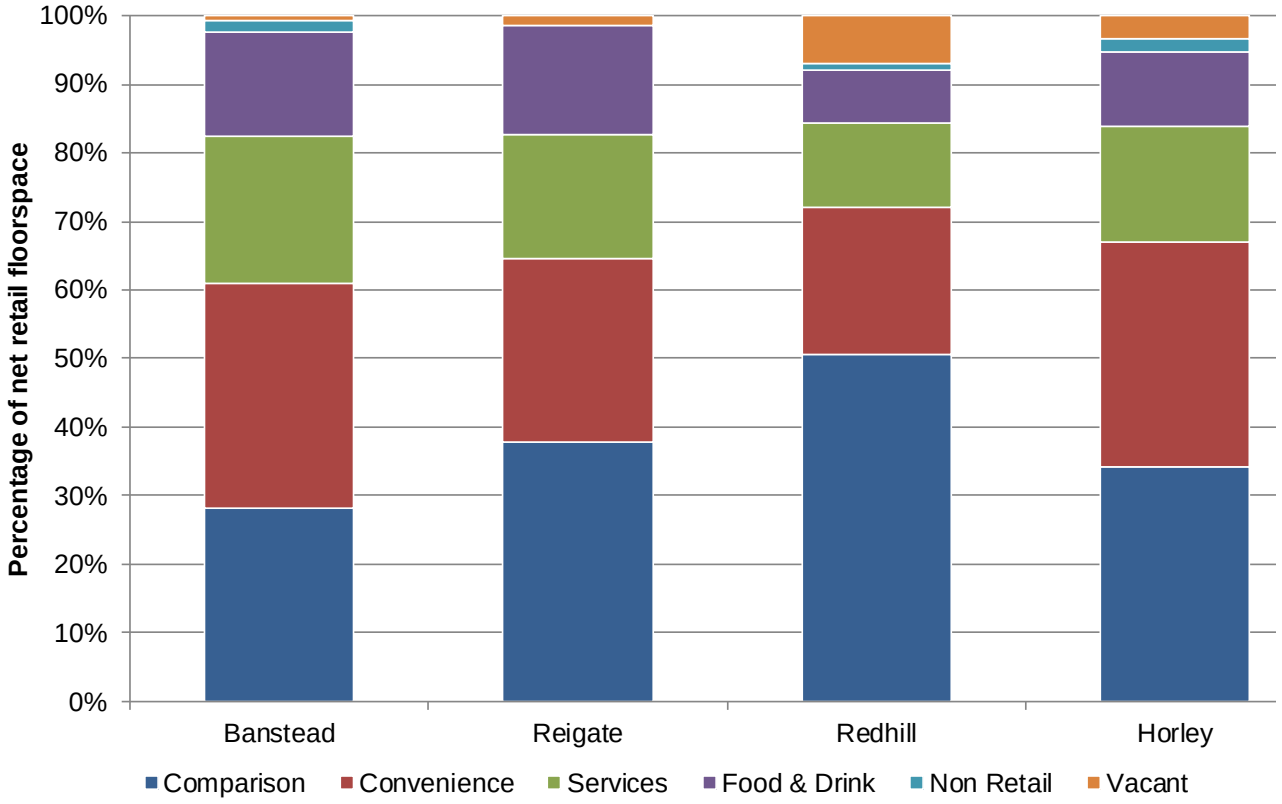
Table 2 shows convenience retail once again accounts for the lowest percentage of units at around 9%, yet still makes up over a quarter of total retail floorspace and is largely due to the dominance of larger format supermarkets. Once again service retail offer makes up the second highest percentage of units across the four town centres, accounting for 30% of the total. However this only makes up around 16% of total retail floorspace, suggesting such businesses tend to occupy smaller retail units.

Table 2 Breakdown of Retail Offer

	Units	Floorspace(sqm)
Comparison	215 (38.2%)	36,948 (41.5%)
Convenience	49 (8.7%)	23,391 (26.3%)
Service	169 (30.0%)	14,024 (15.8%)
Food & Drink Leisure	78 (13.9%)	9,867 (11.2%)
Non-Retail	17 (3.0%)	919 (1.0%)
Vacant	35 (6.2%)	3,720 (4.2%)
Total	**563**	**88,918**

As shown in figure 7 below, Redhill has the highest proportion of comparison retail accounting for over 50% of the centres retail floorspace; however, given its principle role as both a primary centre and main shopping destination for the borough this is perhaps unsuprising. Banstead and Horley both continue to have the highest proportion of convenience retail floorspace, reflecting their roles as district centres serving the needs of the local population.

Figure 7 Retail Offer by Centre



Main Retail Categories

As can be seen in table 3 below there has been relatively little change to the total retail categories on offer across the borough's 4 town centres. Comparison retail once again remains the dominant retail offer accounting for over 38% of the total. Hairdressers, nails, beauty salons, etc are the main service retailers found across the borough's four town centres. Banstead and Reigate have the highest percentage of service type retail at around 10% and 9% respectively and has been the case for a number of years.

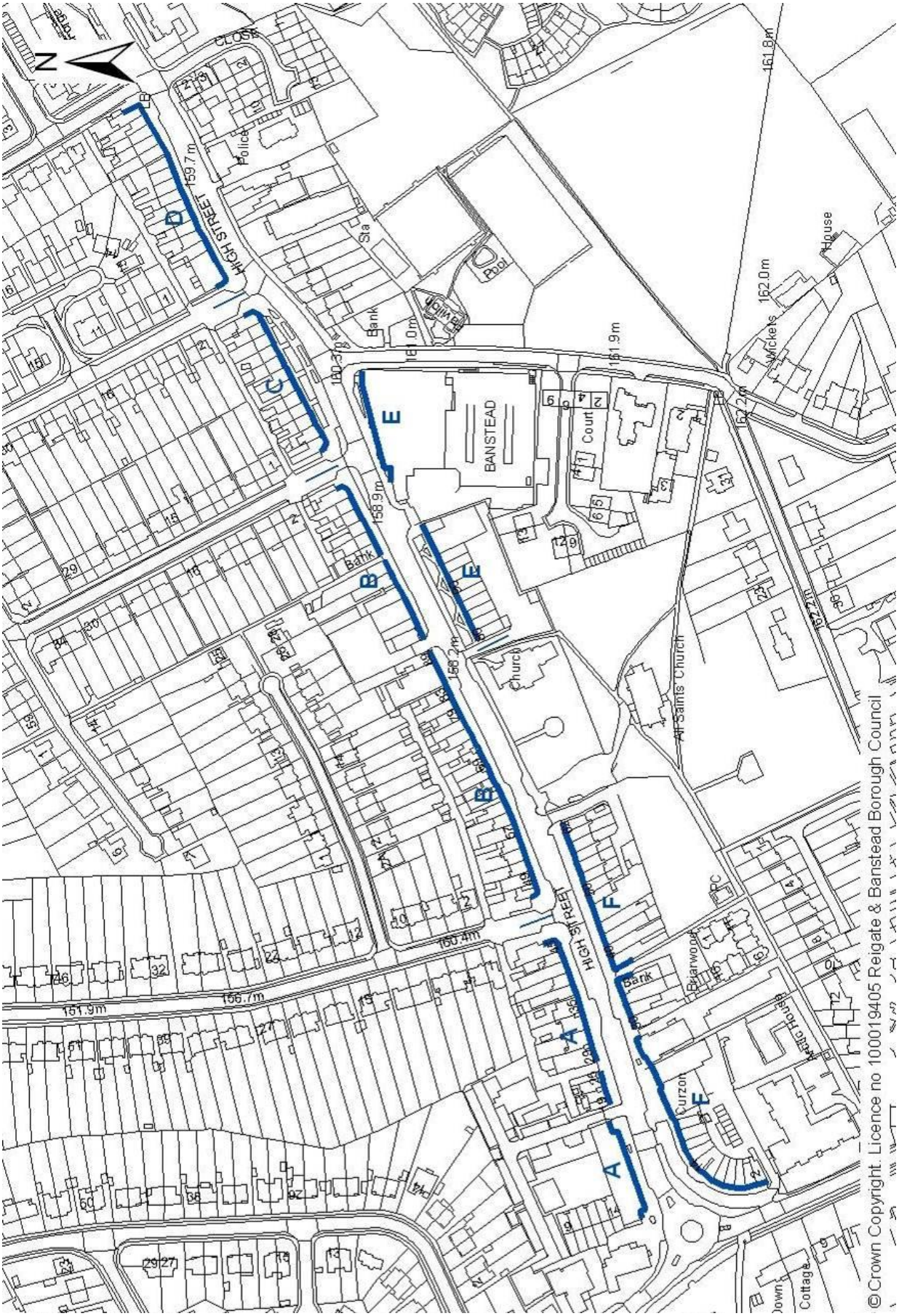
Reigate has the highest proportion of retailers selling clothing, footwear and accessories, accounting for over 40% of the town centre's total comparison retail offer, compared to the 3 other town centres in the borough. Conversely, Redhill town centre continues to have the lowest proportion of clothing, footwear and accessories retailers at around 9%. This is a relatively small proportion given that Redhill is the primary town centre in the borough. Once again, Horley and Banstead town centre's have the highest representation of convenience premises, in particular with supermarket provision reflecting their role more as district centres serving the local catchment.

The borough has a high proportion of food & drink establishments, across the 4 town centres accounting for nearly 14% of all premises. Horley continues to have the most takeaways while Reigate has the highest number of restaurants and pubs.

Table 3 Detailed Breakdown of Retail Categories

Comparison	Banstead	Reigate	Redhill	Horley	TOTAL
Clothing, Footwear & Accessories	16	33	16	8	73
Bookshops & Stationers	2	5	7	1	15
Home & DIY	9	14	3	3	28
Electronics & Technology	2	3	8	0	14
Charity/Second-Hand	6	7	7	9	27
Toys, Games & Sports	0	3	3	0	6
Other Comparison Retail (e.g. Gifts, Florists)	10	15	19	6	48
Total Comparison	**45 (38.8%)**	**80 (46.2%)**	**63 (36.8%)**	**27 (26.0%)**	**215 (38.2%)**
Convenience					
Food/Supermarket	8	5	7	7	27
Newsagents	1	3	4	3	11
Chemist/Pharmacy	4	1	3	3	11
Total Convenience	**13 (11.2%)**	**9 (5.2%)**	**14 (8.2%)**	**13 (12.5%)**	**49 (8.7%)**
Service					
Travel Agents	2	1	2	0	5
Hair & Beauty	12	15	11	9	46
Opticians	4	5	6	1	16
Banking	6	7	8	6	27
Estate Agents	6	11	6	7	31
Bookmakers	2	1	5	2	9
Dry Cleaning	2	3	2	2	9
Other Services (e.g. Employment, Repairs)	6	6	8	5	26
Total Service	**40 (34.5%)**	**49 (28.3%)**	**48 (28.1%)**	**32 (30.8%)**	**169 (30.0%)**
Food & Drink Establishments					
Restaurant	9	13	5	5	33
Take-away	3	3	3	5	14
Café/Sandwich Bar	3	6	7	3	20
Pub/Club	0	6	3	4	13
Total Food & Drink Establishments	**15 (12.9%)**	**28 (16.2%)**	**18 (10.5%)**	**17 (16.3%)**	**78 (13.9%)**
Non A Class	1 (0.9%)	2 (1.2%)	8 (4.7%)	6 (5.8%)	17 (3.0%)
Vacant	2 (1.7%)	5 (2.9%)	19(11.2%)	9 (8.7%)	35 (6.2%)
TOTAL	**116**	**173**	**170**	**104**	**563**

Banstead Village



Commentary

Banstead Village is an attractive district centre which lies close to the northern boundary of the borough. The centre consists primarily of a unified parade of smaller retail units, historically with a strong selection of independent and specialist shops. The centre has two food stores, one at the western end of the high street and the larger, recently redeveloped, Waitrose store towards the middle of the parade.

Vitality

Figure 8 below shows primary retail uses (A1-A5) once again represents over 98% of Banstead's total retail frontage. Banstead continues to fall just short of the threshold target set out in the Borough Local Plan for A1 shops, with almost 72% of the frontage in A1 use against the 75% requirement and has been the case for over a year.

The majority of Banstead's retail floorspace is made up of convenience retail floorspace accounting for almost one third of the total. Of the four town centres, Banstead village has the highest proportion of service floorspace at 21%, further highlighting the centre's primary role as a local centre serving the needs of the local area, as opposed to providing 'destination' retail. Banstead also has the second highest proportion of food & drink leisure retail at 15%, the majority of which is made up of Waitrose.

Figure 8 Breakdown of Use Classes (Frontage)

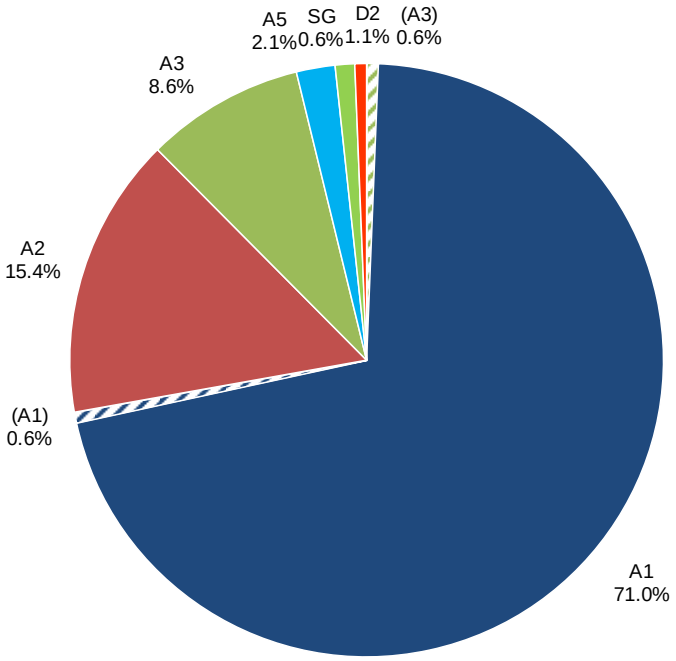


Table 4 Retail Offer

	Units	Floorspace (sqm)
Comparison	45 (38.8%)	3,470 (28.2%)
Convenience	13 (11.2%)	4,038 (32.8%)
Service	40 (34.4%)	2,631 (21.4%)
Food & Drink Leisure	15 (13.0%)	1,819 (14.8%)
Non-Retail	1 (0.9%)	210 (1.7%)
Vacant	2(1.7%)	129 (1.1%)
Total	**116**	**12,297**

Vacancies & New Occupiers

There has been a significant drop in vacant units within Banstead over the past 6 months down from 5 to 2 units.

	Vacancy Rate
% of units	1.7%
% of frontage	1.2%
% of net retail floorspace	1.1%

Banstead Village vacant frontage and net retail floorspace remains below the 5% threshold. Net retail floorspace vacancy fell yet again during the last 6 months and currently stands at 1.7%. This is largely due to the split of a large vacant double retail unit into 2 single units, both of which are now occupied.

In the last 6 months, five new occupiers moved into previously vacant retail units in the town centre and one retail unit (One One Seven) is closing down. The Curry Centre previously occupied a double retail unit (167-169 High Street) has recently downsized and now only occupies 169 High Street, the other unit is currently vacant. A further retail unit, previously occupied by Johnson's Dry Cleaners has been vacant for more than 6 months, however it is currently being refurbished, suggesting a new occupier may take over the unit in the near future.

Development & Use Class Changes

In the last 6 months, a number of new developments have been completed in Banstead and include the previously vacant double unit at 143-145 High Street, which has been separated to form 2 single A1 retail units, both of which are now occupied. A further extension at 167-169 High Street (11/02105/F) has also been completed, providing additional A3 floorspace to the existing Curry Centre, which currently occupies 169 High Street.

These developments have further added to the facilities and services on offer in Banstead town centre, providing additional retail floorspace along with bringing vacant retail units back into use.

Work has also started proposing a change of use to the first and second floors of 141a High Street (11/02105/F) from A2 to residential resulting in a net loss of 80sq/m of retail floorspace.

Planning permission has been granted on the following sites:

- 12/02085/F - Extension to Banstead Methodist Church providing an additional 1,311sqm B1(a)/ D1 floorspace.
- 12/02101/F- new development at 89 High Street providing a net gain of 92sqm of A1 retail floorspace.

Development has not yet started on either of these sites.

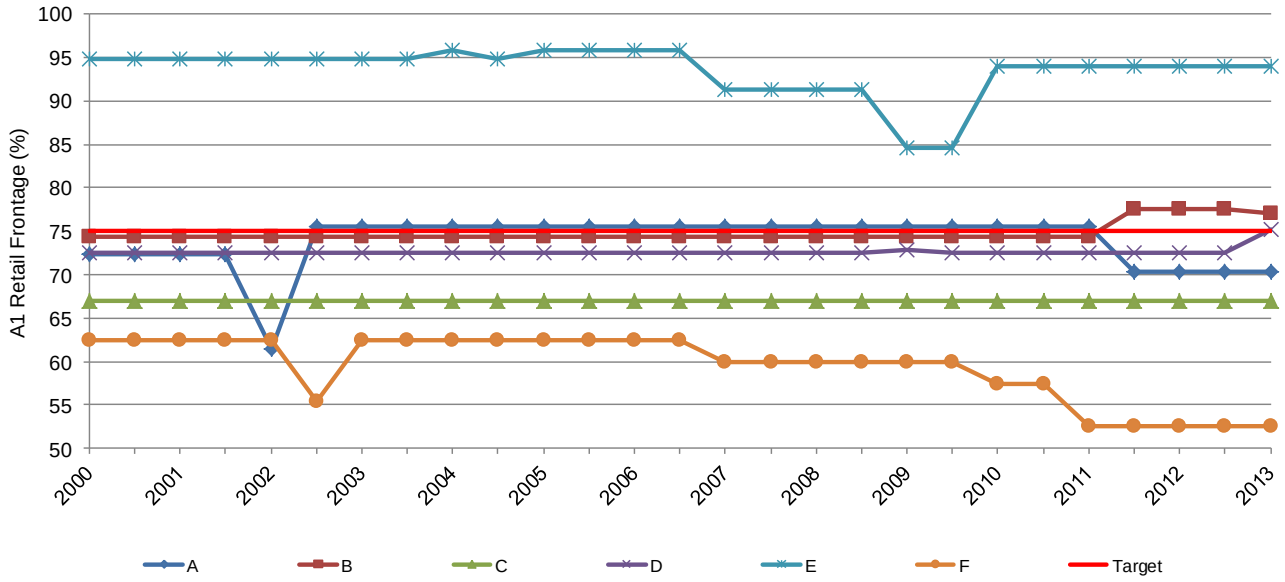
Frontages

As can be seen in figure 9 below there has been relatively little change to A1 retail frontage in Banstead since the last monitoring period. Once again Frontage E continues to exceed the 75% A1 retail target by a significant margin and has done so for a number of years. The location of Waitrose has helped to maintain a strong frontage.

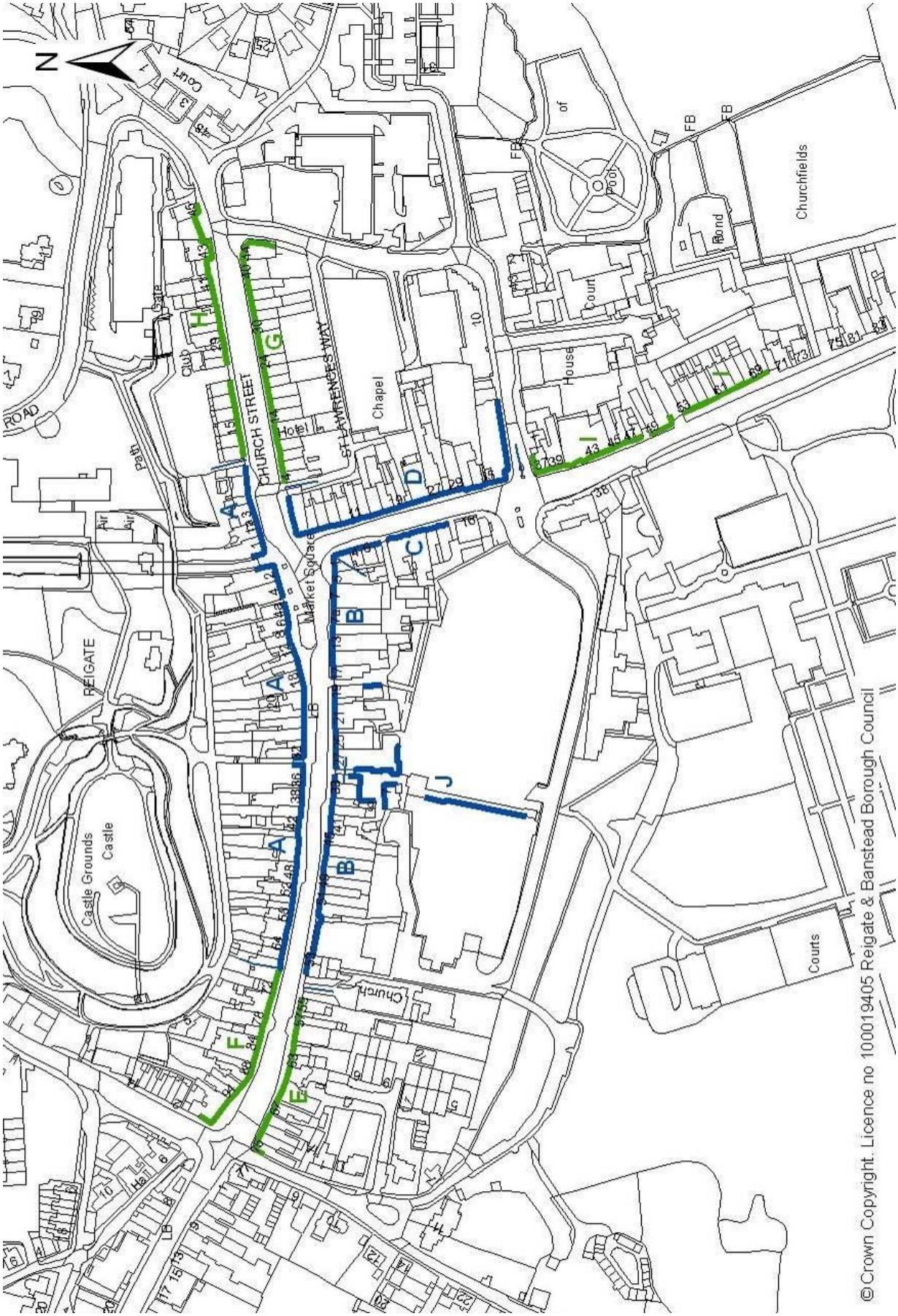
Frontage B and D both exceed the 75% threshold, whilst the proportion of A1 retail within frontage A remains just below the required level.

Frontages C & F both continue to fall below the required A1 level. Frontage F in particular suffers from a small number of A2 and A3 units which have particularly long frontages.

Figure 9 Banstead Frontage A1 Retail Trend



Reigate Town Centre



Commentary

Reigate Town Centre is an historic market town, most of which falls within a conservation area. The centre has a high proportion of smaller retail units, many of which contribute to the character and highly valued townscape of the centre. Reigate in particular has a significant of ancillary space (typically storage) at upper floors which could offer an opportunity for expansion and make a valuable contribution to retail and leisure growth within the town centre subject to appropriate consents.

The three main shopping streets are oriented around the attractive focal point of the Old Town Hall. Reigate Town Centre has a vibrant mix of independent boutique clothing units, complemented by a good selection of cafés and restaurants. The centre has two foodstores, the smaller Marks & Spencer store along the High Street and the large Morrisons supermarket which lies behind the main street in Cage Yard.

Vitality

Figure 10 shows that out of the borough's four main centres, Reigate has the highest proportion of frontage falling within A1 to A5 use classes, at over 99%. Significantly, the proportion is consistent across both the primary and secondary frontages. However, both the primary and secondary frontages fall slightly below the A1 threshold in the local plan, with the primary frontage having around 74% (against 80% target) and the secondary frontage with 58% (against 66% target).

In terms of offer, Reigate continues to have the largest number of food & drink leisure offer, accounting for over 13% of retail units and almost 16% of floorspace, the highest percentage out of the four town centres. A significant proportion of these food & drink units are within the secondary frontages of Reigate Town Centre. Many of these cafés, restaurants and pubs are of high quality and contribute to the vitality and active evening environment within the town centre. Reigate also has the highest percentage of comparison units and the second highest proportion of comparison retail floorspace after Redhill. This is largely due to the high volume of boutique shops selling specifically Home & DIY, gifts, clothing, footwear and accessories, which when combined together account for almost 36% of the total retail premises.

Figure 10 Breakdown of Frontage by Use (Primary – Left; Secondary – Right)

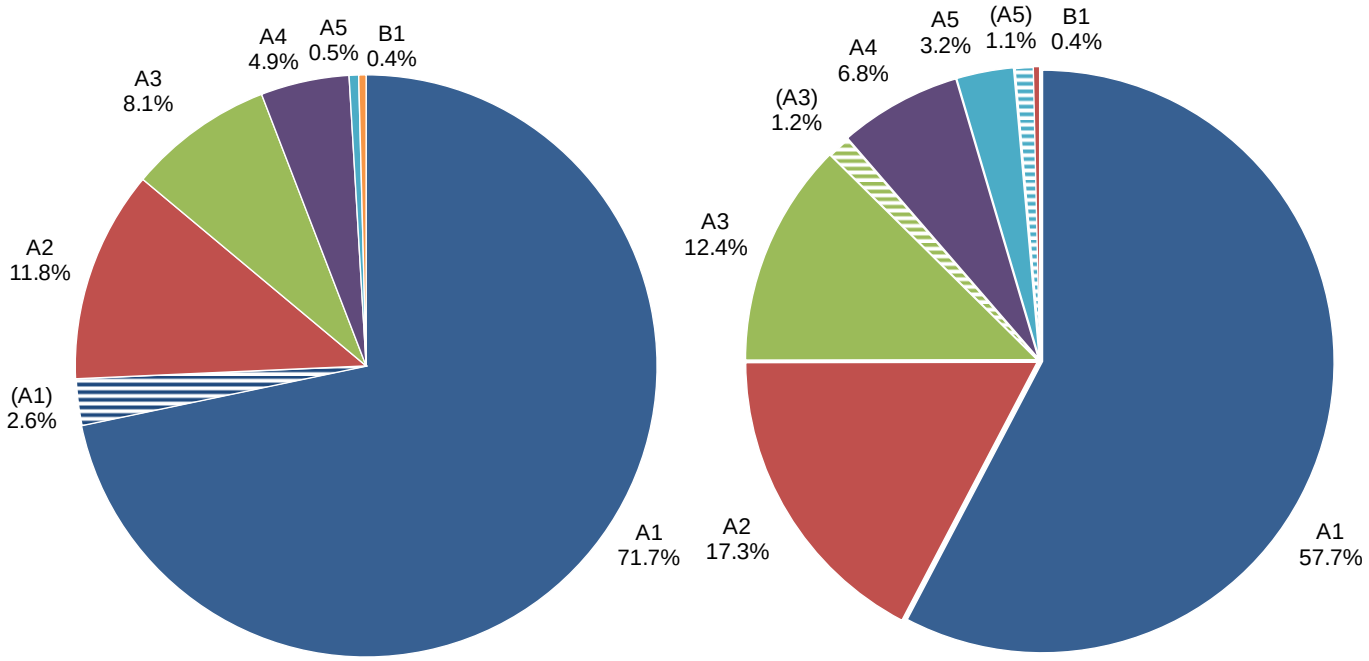


Table 5 Retail Offer

	Units	Floorspace (sqm)
Comparison	80 (46.2%)	7,529 (37.9%)
Convenience	9 (5.2%)	5,276 (26.6%)
Service	49 (28.3%)	3,595 (18.1%)
Food & Drink Leisure	28 (16.2%)	3,158 (15.9%)
Non-Retail	2 (1.2%)	0 (0.0%)
Vacant	5 (2.9%)	301 (1.5%)
Total	**173**	**19,859**

Vacancies & New Occupiers

Over the last six months the number of vacant units in Reigate has increased from 3 up to 5 units, which represents 2.9% of the town centres units. This has led to an increase in the total amount of vacant floorspace which now stands at around 301sqm (1.5%) of the total. Total vacant frontage has also increased to 2.5% and is partly due to a larger retail unit previously occupied by Blockbuster becoming vacant in the last 6 months.

	Vacancy Rate
% of units	2.9%
% of frontage	2.5%
% of net retail floorspace	1.5%

There has been some change in Reigate town centre since the last monitor was published. The total number of new occupiers moving into the town centre has halved in the last 6 months. In this monitoring period a total of 4 new occupiers moved into previously occupied retail units. Against this 5 units stand vacant, 2 of which became vacant in the last 6 months, including Blockbusters which recently went into administration. The remaining 3 units have been vacant for more than a year. Refurbishment work is currently being carried out on 2 of the long term vacant units previously occupied by Café Puccino and Wok Inn, suggesting 2 new occupiers could potentially be moving in.

Development & Use Class Changes

There have been two changes of use in the last 6 months one to the 2nd floor suite at 39-41 Church Street (12/00856/CU) from previously vacant second floor offices (B1(a) into D2 use which is now occupied by Reigate Pilates. The second change of use was from A3 to A1 at 51a High Street which is now occupied by Paperchase.

A number of planning permissions remain extant, as follows:

- 11/02227/CU – Conversion of 25-29 Church Street from D2 into a restaurant (A3).
- 11/01488/F – Demolition of the existing building to the rear of the site to be replaced with a 2 storey office building, providing an additional 106 sqm of B1(A) use.

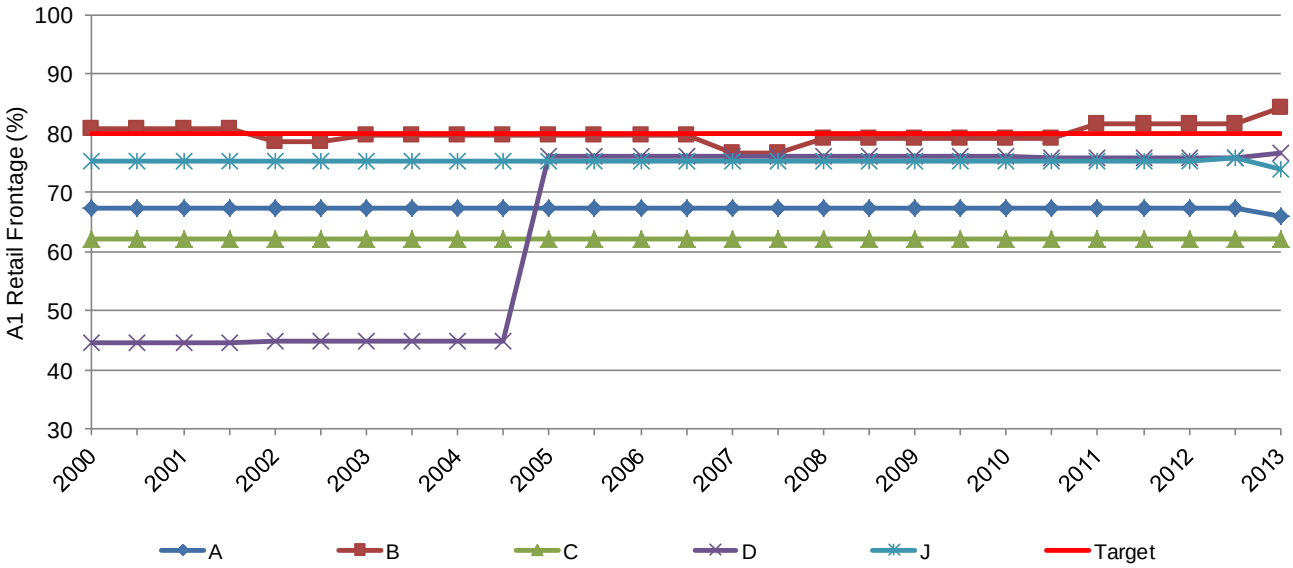
Planning permission has recently been granted proposing a change of use from B1(a) offices to either A2 or D1 use at Emmerton House, 16 Bell Street (13/00281/CU). Development has not yet started on the site.

Frontages

Primary

In the last 6 months the percentage A1 retail for frontages B and D both increased, with the biggest increase in frontage B, which at84% continues to be the only primary frontage to exceed the 80% threshold for A1 frontages. There has been no change in frontage C at 62% which has a high number of estate agents and has been the case for the last 3 years. Frontage A, D & J also continue to fall below the A1 requirement, most noticeably frontage A at 66%, this is largely due to the volume of A1/A2 units with small frontages.

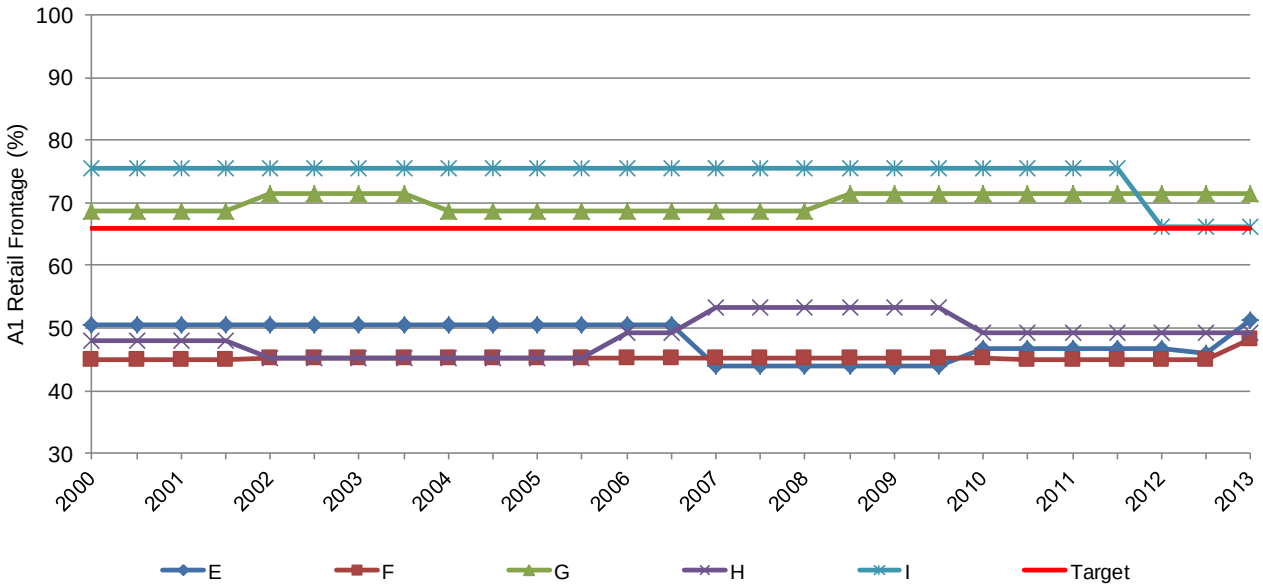
Figure 11 Reigate Primary Frontage A1 Retail Trend



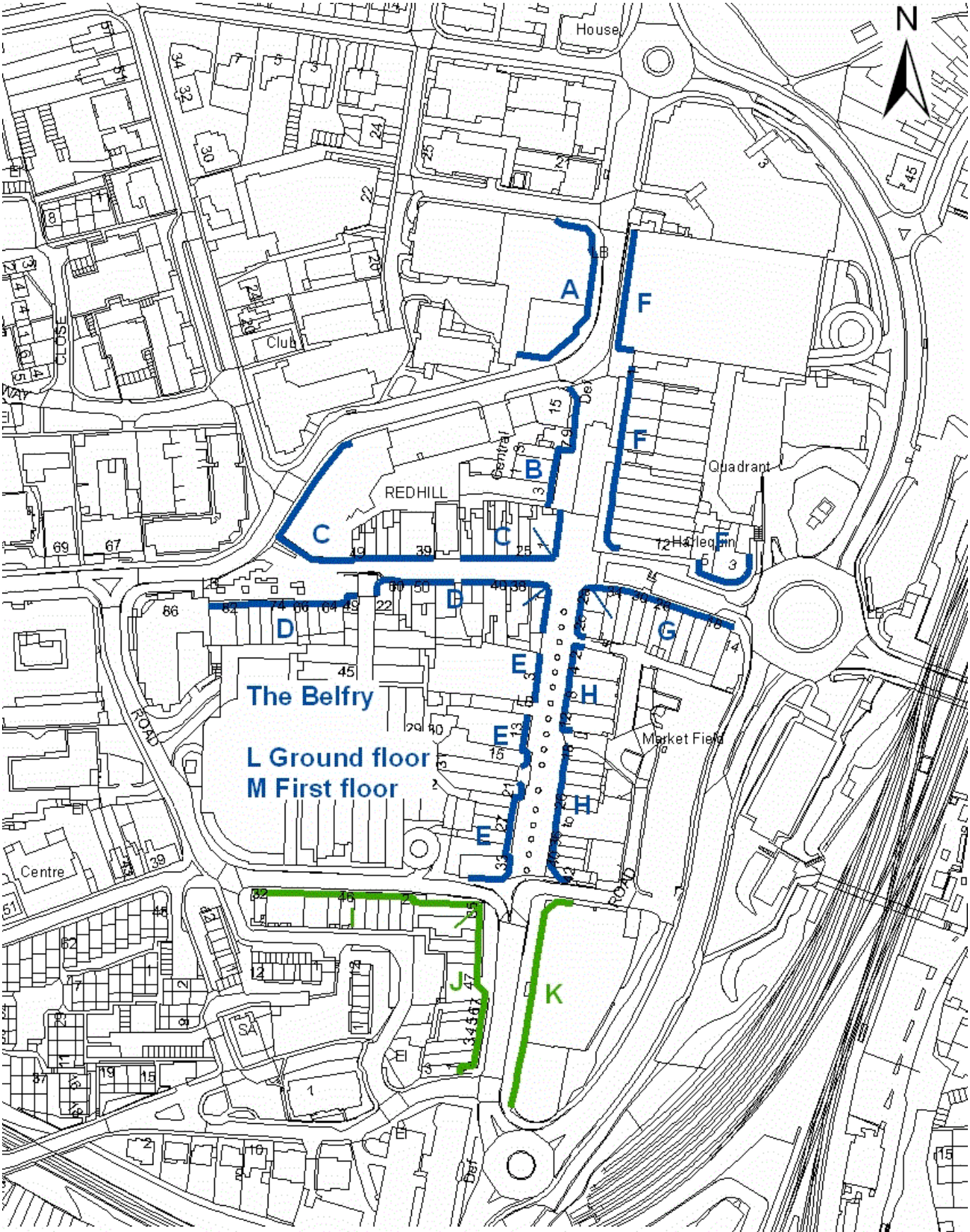
Secondary

There has been little change to the composition of secondary frontages in the last year, with all 5 secondary frontages in A1 broadly staying the same. Once again frontages G & I exceed the 66% A1 requirement and have done so for the past decade. Conversely, frontages E, F & H still fall below the target and have done so for the last few years.

Figure 12 Reigate Secondary Frontage A1 Retail Trend



Redhill Town Centre



Commentary

Redhill Town Centre is the largest of the borough's town centres in terms of retail frontage and is recognised as a major town centre by the Surrey retail hierarchy. Retail activity is focussed around the main pedestrianized High Street which runs from north to south, with a series of smaller shopping streets running off of this. However, it is recognised that the public realm and townscape within the centre is in need of attention. Redhill Town Centre is also home to the Belfry Shopping Centre and the Harlequin Theatre.

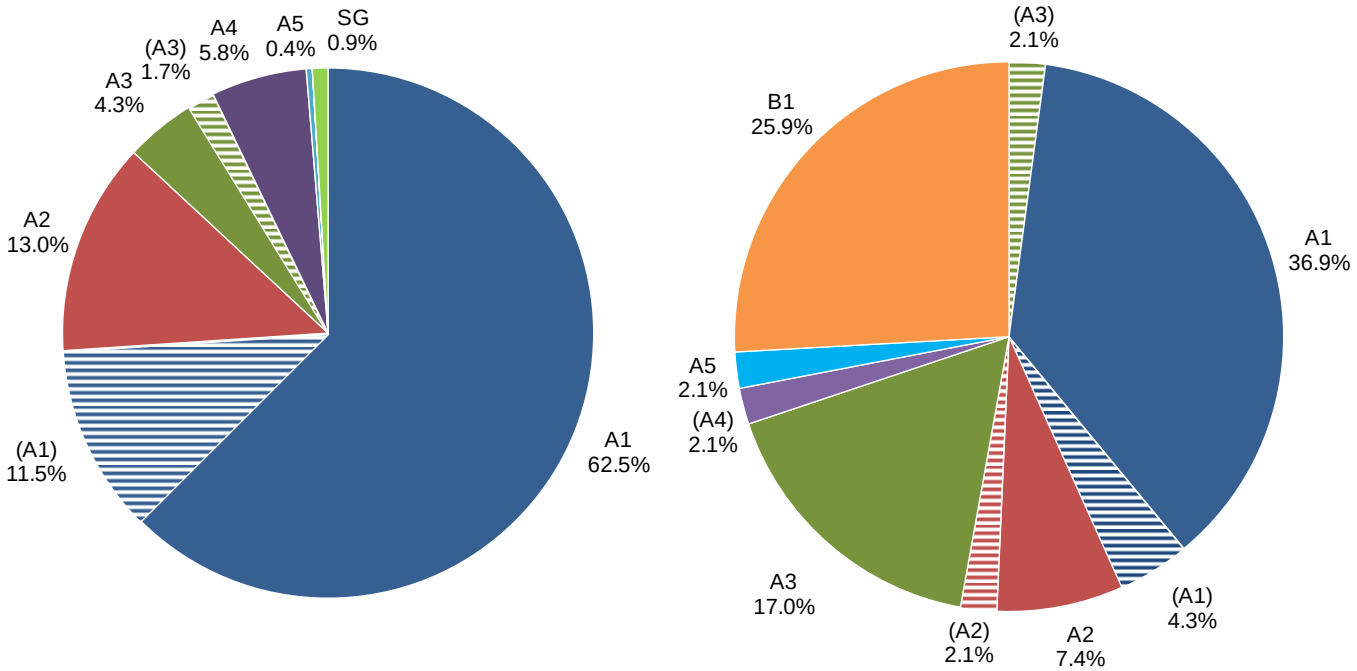
The regeneration of Redhill continues to gather pace following on from the redevelopment of Nobel House. Planning permission has been granted for a multi-million pound redevelopment of Warwick Quadrant, which will include a larger Sainsbury's supermarket, a new gym and town centre car park. Additional work will also be carried out to improve the public open spaces and realm within Redhill Town Centre. There are further plans proposed for the redevelopment of Redhill train station and a new traffic management system (Balanced Transport Network).

Vitality

Retail (A1 to A5) uses constitute around 94% of the total frontage in Redhill Town Centre, the lowest of the four town centres. However, this varies significantly across the primary and secondary frontages with the former having more than 99% of the frontage in retail use whilst the latter only has 74%.

Both the primary and secondary frontages miss the A1 requirement, with the primary frontage having 74% (against 80% target) and the secondary only 41% (against 66% target). However, recent developments within the secondary frontage have replaced active retail frontage with office frontage and as such it may be sensible to consider reviewing the extents of these frontages. Of all of the town centres, Redhill has the largest representation of multiple retailers, particularly within the Belfry Shopping Centre which is home to stores such as Burton/Dorothy Perkins, Waterstones and Clarks Shoes. In the last 6 months total vacant primary retail frontage has further increased to almost 14%, a large proportion of which is located within the Belfry Shopping Centre.

Figure 13 Breakdown of Frontage by Use (Primary – Left; Secondary – Right)



Comparison retail remains the dominant retail offer in Redhill, as would be expected for a primary centre and sub-regional destination. At 51%, Redhill has a considerably higher proportion of floorspace offering comparison goods than any of the other centres. Food & drink leisure offer still

accounts for 7.6% of floorspace in Redhill, significantly below the boroughs other three centres. It is also widely recognised that the quality of offer in the town centre is relatively low. This is an area which will need to be addressed if Redhill is to become a competitive and successful shopping and leisure destination. A high degree of diversity exists within Redhill's secondary frontages that could be a positive asset to the town centre.

Table 6 Retail Offer

	Units	Floorspace (sqm)
Comparison	63 (37.1%)	20,142 (50.7%)
Convenience	14 (8.2%)	8,486 (21.4%)
Service	48 (28.2%)	4,931 (12.4%)
Food & Drink Leisure	18 (10.6%)	3,050 (7.6%)
Non-Retail	8 (4.7%)	345 (0.9%)
Vacant	19 (11.2%)	2,786 (7.0%)
Total	**170**	**39,740**

Vacancies & New Occupiers

Once again the number of vacant retail units in Redhill increased from 18 to 19, the highest figure when compared to the other 3 town centres in the borough. This in turn has led to an increase in Redhill's overall vacancy rate which is now over 11% and has been the case for over a year.

	Vacancy Rate
% of units	11.2%
% of frontage	12.8%
% of net retail floorspace	7.0%

In the last 6 months there has been a slight increase in new occupiers moving into the town centre from 5 to 6, of which 3 moved into previously vacant retail units and one further occupier moved into a previously occupied unit. Another new occupier is currently fitting out into a retail unit which was vacant for more than a year and Co-Op has also recently moved into the redeveloped site at 51-57 Station Road. A total of 17 units currently stand vacant, 1 less than recorded in the previous monitoring period, 5 of which became vacant in the last 6 months. This is partly due to the continued downturn on the high street with the loss of further prominent high street retailers such as Jessops. The remaining 13 units have been vacant for over a year, of which 6 are located in the Belfry shopping centre. This further emphasises the need to monitor retail performance in the town centre to ensure that the number of vacant units does not continue to rise and potentially threaten Redhill's main function, as a primary town centre.

Developments & Use Class Changes

In the last 6 months there has been some change in Redhill town centre. Co-Op has recently moved into one of the previously vacant A1 retail units at 51-57 Station Road. There has also been a change of use from A1 to D2, which is currently being fitted out.

There are a number of planning permissions proposing extensions and a change of use in Redhill town centre as follows: development has not yet started on any of the sites.

- 12/01851/F- a single storey office extension at 42 Station Road providing additional A2/SG floorspace
- 11/02132/F –Extension at 7-9 London Road providing 3,059 sqm of additional A1 floorspace
- 11/01586/F- proposing a change of use from A2 (bank) to A3 (restaurant) at 1 London Road

A revised application for the redevelopment of the existing Sainsbury's store on London Road has been approved by the council. The revised plans are no longer proposing a hotel, but still propose extending the existing foodstore, providing a new gym, along with improvements to the public realm and townscape in the town centre. This development will contribute to the overall regeneration of Redhill.

An application by ASDA (ref: 11/01860/F) to redevelop the Cromwell Road site to provide a large foodstore (net 2,600sqm) and a number of smaller retail units is still being considered by the council.

A revised application (13/00420/F) has been submitted to the council to redevelop the former Liquid & Envy nightclub and is currently pending consideration. The revised proposal will still include a ground floor retail unit (A1/A2), associated parking, landscaping, etc, but has increased the number of residential premises up to 61.

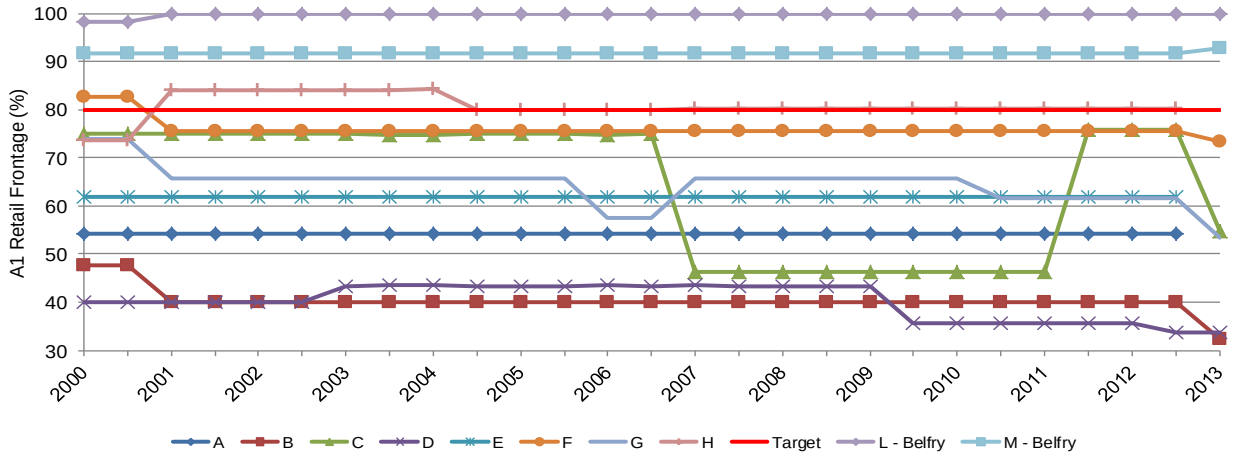
Frontages

Primary

Frontages L & M represent the two levels within the Belfry Shopping Centre. Once again both frontages clearly and consistently exceed the 80% threshold at 100% and 92% respectively. Outside of The Belfry, only Frontage H continues to meets the 80% target for A1 retail within the primary frontage. This has remained the case since 2001. Frontages B, C, F & G all saw a drop in A1 retail frontage all of which are below the borough's 80% target. In particular frontage C saw the biggest drop in the last 6 months, largely due to 2 large retail units with long frontages becoming vacant.

The remaining primary frontages still continue to fall considerably below the target. Yet again frontages B & D are of particular cause for concern, these both consist of less than 50% frontage occupied by A1 retail. Frontage B suffers from a high proportion of A2 financial and professional services premises, whilst Frontage D has an extremely diverse mix, comprising A1, A2, A3, A4 and Sui Generis uses.

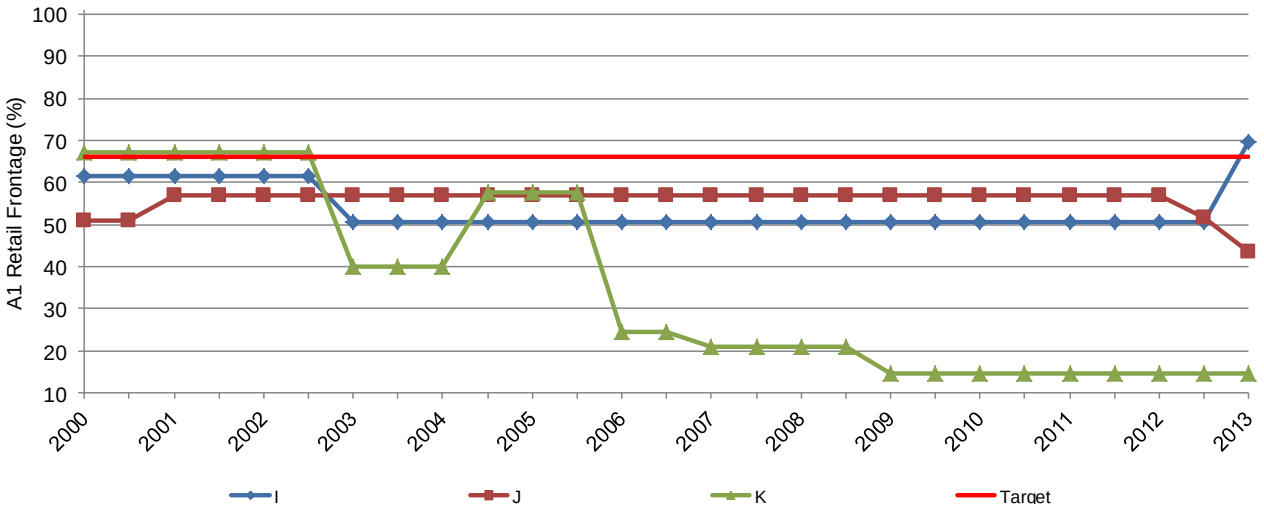
Figure 14 Redhill Primary Frontage A1 Retail Trend



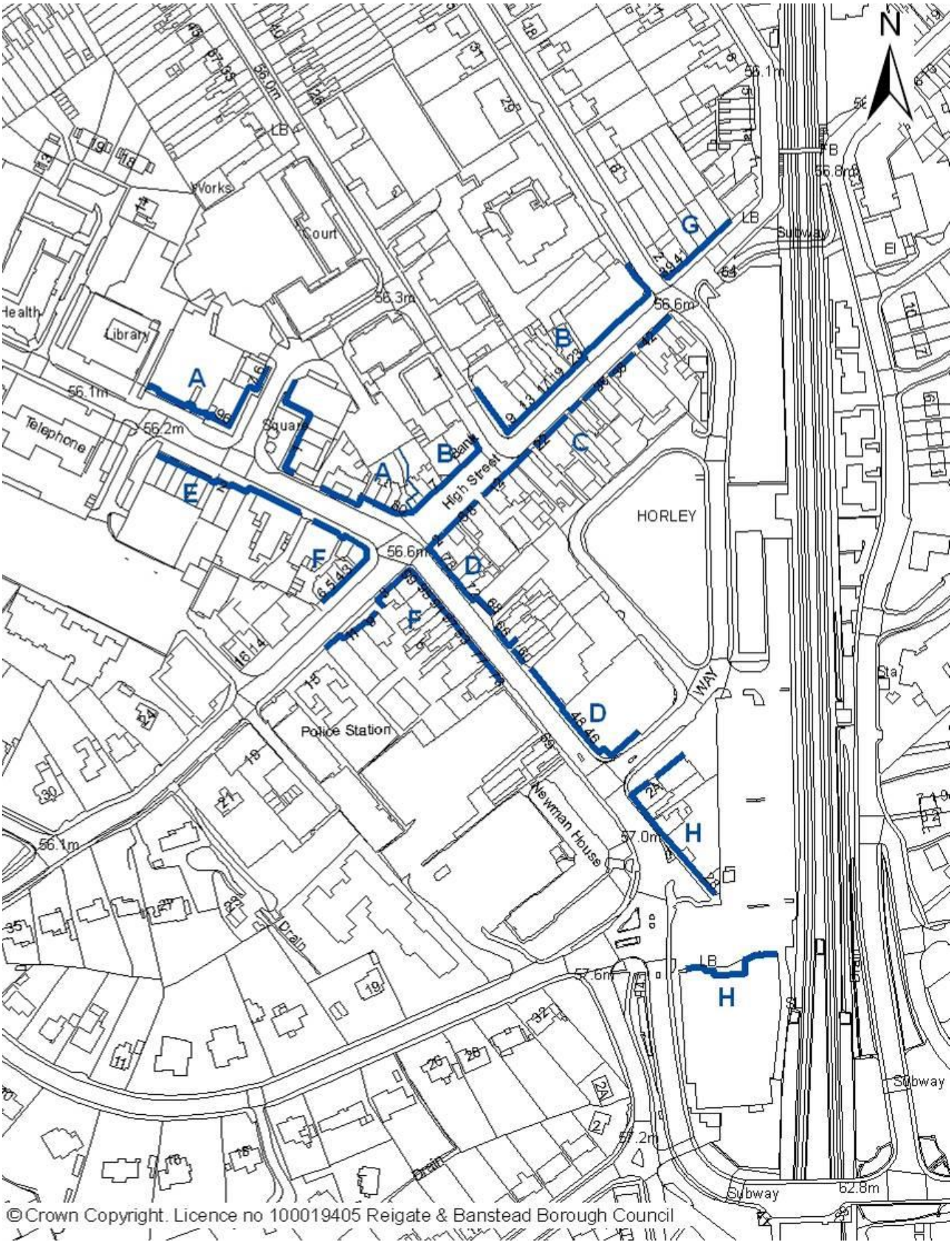
Secondary

Frontages J & K both continue to fall below the borough's 66% A1 retail requirement accounting for 43% and 15% respectively. The low proportion of A1 retail in frontage K is largely as a result of the Kingsgate and Red Central office development, replacing previous retail frontages with offices. As part of the Development Management Policies (DMP), it may be worth considering whether it remains appropriate to consider area K as part of the retail frontage. Conversely Frontage I was the only secondary frontage to meet the 66% requirement of almost 70%. This is partly due to a number of A1 retail units with long A1 frontages located in this area.

Figure 15 Redhill Secondary Frontage A1 Retail Trend



Horley Town Centre



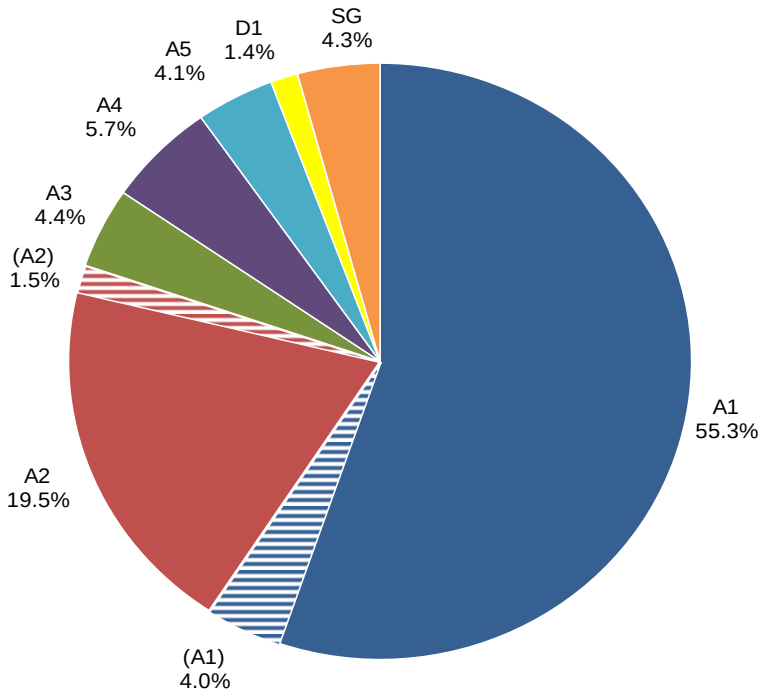
Commentary

Horley Town Centre is a compact district centre at the southern end of the Borough. The centre benefits from Horley railway station which lies just beyond the shopping area to the south. The centre consists of several shopping areas orientated around the junction of Victoria Road and High Street. The main parade on High Street is pedestrianized with other areas of the town centre undergoing significant public realm improvements as part of the Horley Town Centre regeneration. The town centre is also home to a large Waitrose store to the south and a large independent department store (Batchelors).

Vitality

Once again the main retail uses (A1-A5) account for almost 95% of the total frontage within Horley Town Centre. In the last 6 months there has been a slight increase in the proportion of frontage in A1 use accounting for just over 59%. This is still considerably lower when compared with the boroughs other three centres. Against this, frontage in A2 use has fallen and now makes up 21% as a result of a change of use. Horley Town Centre's retail frontage is predominately dominated by food & drink retail uses (A3-A5), which continues to make up around 14% of the total.

Figure 16 Breakdown of Frontage by Use Class



Whilst comparison retail is the most represented type in terms of floorspace (at 34%), this is still the second lowest proportion of all of the town centres. Comparison floorspace, is closely followed by convenience uses at 33% floorspace. The high proportion of convenience retail floorspace in Horley is not surprising given its role as a district centre serving the needs of the local population.

Once again Horley has the highest proportion of takeaways and charity shops compared with the other three town centres, which could affect the long term viability of Horley town centre in terms of an appropriate mix. The protection of key retail services is important to ensure that there is sufficient provision to accommodate the increasing demand from on going residential developments in the north of the town.

Table 7 Retail Offer

	Units	Floorspace (sqm)
Comparison	27 (26.0%)	5,807 (34.2%)
Convenience	13 (12.5%)	5,592 (32.8%)
Service	32 (30.8%)	2,867 (16.8%)
Food & Drink Leisure	17 (16.3%)	1,839 (10.8%)
Non-Retail	6 (5.8%)	365 (2.2%)
Vacant	9 (8.6%)	553 (3.2%)
Total	**104**	**17,023**

Vacancies & New Occupiers

The total number of vacant retail units in Horley Town Centre has increased by 1 over the last six months and currently stands at 9. This has led to an increase in the overall vacancy rate (8.6%) within the town centre, which is still higher then the borough's overall target of 5%.

Horley's vacancy rate further increased in the last 6 months and now accounts for 8.6% of units; this remains the second highest vacancy rate behind Redhill. Horley's vacancy rate has been above the borough's target for units and frontage for a year. However total net retail floorspace has dropped significantly in the last six months and is largely due to a number of new occupiers moving into a large vacant unit, previously occupied by Peacocks.

	Vacancy Rate
% of units	8.6%
% of frontage	6.4%
% of net retail floorspace	3.0%

Over the past 6 months the total number of new occupiers moving into Horley has increased. A total of seven new occupiers moved into the town centre, five occupying previously vacant units one of which includes a large retail unit previously occupied by Peacocks. A further two have taken over previously occupied units. Five units have remained vacant for a year, and include a large retail unit previously occupied by Stead & Simpsons, which is currently undergoing refurbishment. In total four units became vacant in the last 6 months, taking the total vacancy rate up to 9 units.

Developments & Use Class Changes

Over the past six months there has been some change to Horley Town Centre. This includes 3 changes of use along the high street, one at 64 Victoria Road for mixed use with A1 ground floor retail and SG use upstairs as a tattoo and piercing parlour, which has recently opened up as Studio Voltage tattoo and piercing parlour. A further 2 change of use were along the High Street, one for a previously vacant unit (A2 use) which has since changed to A1 use. The other change of use comprises of D1 place of worship and class B1 offices to the first and second floor on 43-49 High Street (11/01959/CU).

There are also 2 extant planning permissions one on the cleared Newman House site (12/01881/F), proposing a total net gain of 3,330 sq/ft of A1, A2 & A3 mixed use. The other is a renewal of an existing extant permission to redevelop 43-49 High Steet, Horley (11/00423/F) comprising of retail, residential and offices.

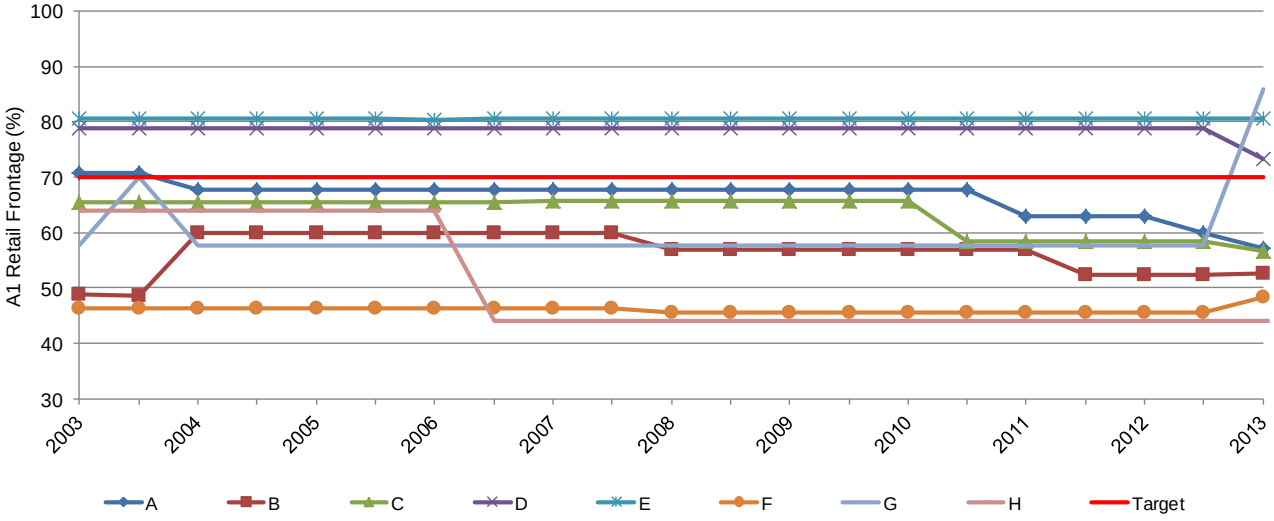
Frontages

Frontages D & E continue to exceed the 70% A1 retail requirement and have done for the last 10 years. Frontage G has increased significantly in the last 6 months from 58% up to 86%, this is due to a new occupier moving into a previously vacant retail unit with a substantial frontage.

Once again frontages F & H continue to fall somewhat short of the required target and currently

account for 48% and 45% respectively. This has been the case for the last 10 years and is largely due to frontage H consisting of predominately A5 use (take-away premises), whilst frontage F has a high proportion of both A2 and A3 units.

Figure 17 Horley Frontage A1 Retail Trend



Appendix

Survey Notes

The survey of occupiers and primary activity is carried out annually at the beginning of October. Frontage length is not measured annually and changes are only made where a planning permission is known to alter the frontage.

Measurements of shop frontages are obtained using the following rules:

- A shop front is taken as the distance between the extreme left hand side and the extreme right hand side of the shop, along the street frontage
- Measurements are taken as a straight line across irregular or indented frontages
- Splays are included as part of the frontage measurement
- Measurements include all window and supporting frames, columns and pillars
- Doorways leading to shops are included in frontages
- Doorways leading to upstairs offices or residential units are excluded, but may be shown as nil frontage
- Returns are included in the frontage lengths and are identified in the schedules
- Returns are measured to the end of the last door or window leading directly into the shop or office. Separating walls and columns are included up to that point
- Returns in alleyways are included but alleyways themselves are excluded
- Certain buildings may be included in the listing but excluded from frontage length analysis and calculations

Definitions

Shop	Specifically a premises of A1 use but can sometimes be used to refer to any unit within the shopping frontage of a town centre
Retail	Umbrella terms for uses falling within any A class (A1, A2, A3, A4 or A5)
Vacancy	An unoccupied unit - a unit is not considered to be vacant if it is part of an ongoing redevelopment scheme, has been demolished or is undergoing refurbishment/fit out.
Comparison	Non-food items such as clothing, furniture and electrical goods which are not purchased on regularly and for which some comparison is normally made before purchase
Convenience	Everyday items such as food, newspapers and drinks, which tend to be purchased regularly.
Service	Businesses offering some form of service to the public excluding those offering food and drink
Food & Drink Leisure	Retailers selling prepared food and drink for consumption on or off the premises including cafes & restaurants, bars, pubs and takeaways.
Frontage Length	The length in metres of the shop frontage (see measurement rules above)

Use Classes Order

Use Class	Description of Use/Development	Permitted Change
A1	Shops, retail warehouses, hairdressers, travel agents, post offices, sandwich bars, Internet cafes, showrooms, domestic hire shops, undertakers and dry cleaners.	No permitted change
A2	Banks, building societies, estate agents, professional and financial services.	A1
A3	Restaurants and cafés.	A1 or A2
A4	Drinking Establishments.	A1, A2 or A3
A5	Hot Food Takeaways.	
B1(A)	Use as an office other than a use within Class A2 (financial and professional services).	B8 (where no more than 235 sq.m.)
B1(B)	Use for research and development, studios, laboratories, high technology.	
B1(C)	Use for any industrial process that can be carried out in a residential area without detriment to amenity.	
B2	Use for the carrying on of an industrial process other than one falling in B1(C) above.	B1 or B8 (B8 limited to 235 sq.m.)
B8	Use for Storage or Distribution.	B1 (where no more than 235 sq.m.)
C1	Use as a hotel, boarding house or guesthouse where no significant element of care is provided	No permitted change
C2	Residential institution such as a nursing home or residential school.	No permitted change
C3	Use as a dwelling house, whether or not as a sole or main residence.	No permitted change
D1	Non-Residential Institutions.	No permitted change
D2	Use for Assembly and Leisure.	No permitted change
SG	Sui Generis - falls outside all other categories. Permission is required to change to or from such a use.	No permitted change

Monitoring Publications

Regular Monitors:

Areas for Small Businesses

Provides a list of all uses in the Borough's seven Areas for Small Businesses (Annual)

Commercial Commitments

Contains the amounts, types and location of all commercial commitments i.e. premises with outstanding planning permissions or vacant floorspace (Annual)

Housing Delivery

Provides information on general housing market trends and the delivery of the amount, type and location of housing commitments in the Borough (Annual)

Industrial Estates

Contains an analysis of occupational trends in the Borough's nine main Industrial Estates including a schedule of occupiers (Annual)

Local Centres

Provides information on retail provision in the Borough's eighteen local shopping centres (Annual)

Town Centres

Provides information on the occupiers, together with vacancies and shop type of all premises within the Borough's four Town and Village Centres (Bi-annual)

Population and Demographic Information

These publications are available on the Council website:

http://www.reigate-banstead.gov.uk

Search for: *"monitors":*

For further information on the content or other planning policy monitoring, please contact:

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Email: LDF@reigate-banstead.gov.uk