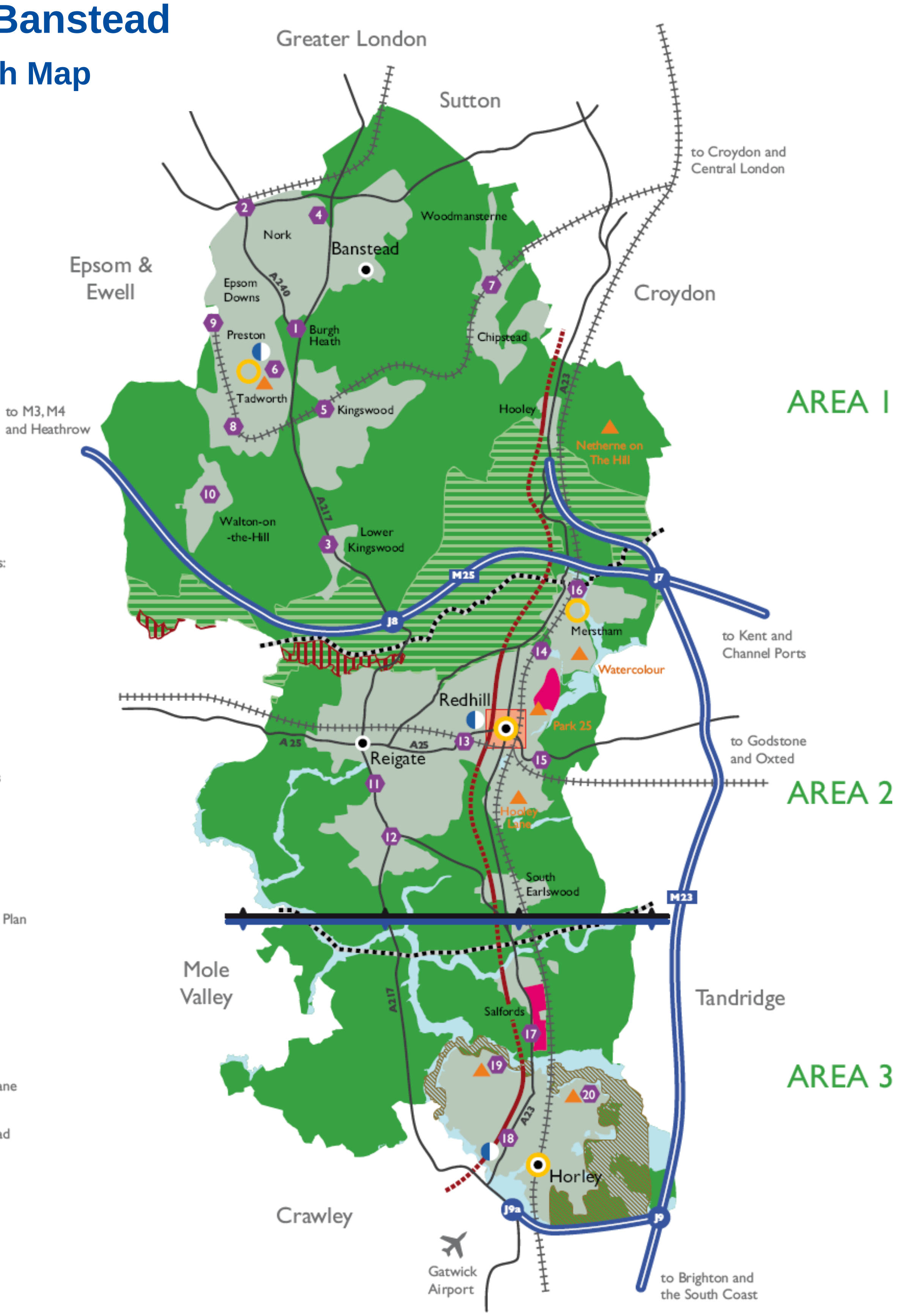
Town Centre Monitor

September 2012

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

Reigate & Banstead
Borough Map



- Motorway
- A Roads
- Railway Lines

South East Plan Regional Boundaries:

- London Fringe
- Gatwick Area
- Redhill TCAAP
- Town Centres
- Regeneration Areas
- Urban Areas
- AONB
- SAC
- Strategic Employment Sites
- Strategic Corridor
- Green Belt
- Rural Surrounds of Horley
- Major Housing Sites
- Council Leisure Facilities
- Area of Constraint - Flood Plan
- Area Boundary

Local Shopping Centres

1. Burgh Heath
2. Drift Bridge
3. Lower Kingswood
4. Nork Way
5. Kingswood Waterhouse Lane
6. Shelvers Way
7. Station Approach, Chipstead
8. Tadworth
9. Tattenham Corner
10. Walton-on-the-Hill
11. Lesbourne Road
12. Woodhatch
13. Linkfield Corner
14. Merstham Village
15. Nutfield Road
16. Portland Drive, Merstham (subject to regeneration improvements)
17. Brighton Road, Salfords
18. Brighton Road, Horley
19. Meath Green Lane, Horley
20. Langshott/Lake Lane, Horley

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September 2012

Contents

Please Note:
The information contained within this monitor is a record of the observed current uses and occupiers present within the four main town centres in Reigate & Banstead at the end of September 2012. 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 the Development Management section of the Policy, Development and Property Department.

While every care has been taken to ensure that the information in this monitor is accurate, the Borough Council does not accept responsibility for any errors or omissions. Please draw attention to any inaccuracies so that they might be corrected. Similarly, any suggestions that would make the information more useful would be welcomed.

Introduction

The 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 is in the process of being replaced by an updated Local Plan in the form of a suite of Local Development Framework (LDF) documents. The Council submitted its Core Strategy in May 2012 and an exploratory meeting was held at the end of August 2012. Following on from the exploratory meeting, the examination process has temporarily been suspended to allow the council to carry out further work on specific areas. It is anticipated that hearing sessions will commence in spring 2013.

Detailed policies relating to the management of development within town centres will be contained within the Development Management Policies (DMP), which is currently being prepared. Policies directing the development of Redhill Town Centre 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%
Vacancy Target	The 5% target reflects the long term average vacancy rate experienced across the borough's four town centres over the past 10 years.

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:

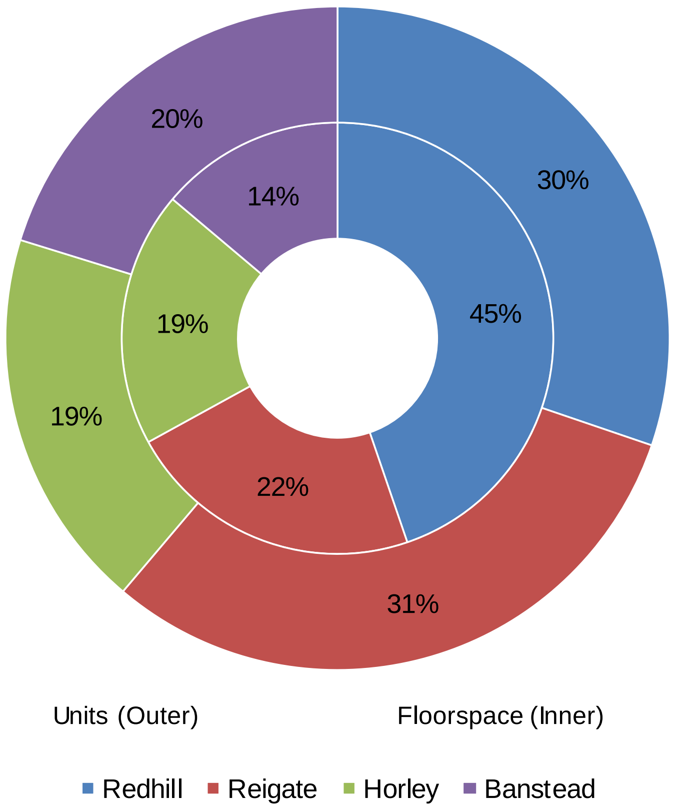
- **Redhill Town Centre –** is the primary town centre and focus of future leisure, office and comparison retail growth due to its role as a Regional Hub and strong transport links.
- **Reigate Town Centre –** is the secondary town centre, serving as a convenience destination with a strong range of independent 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 almost 560 retail 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 5,350 metres.

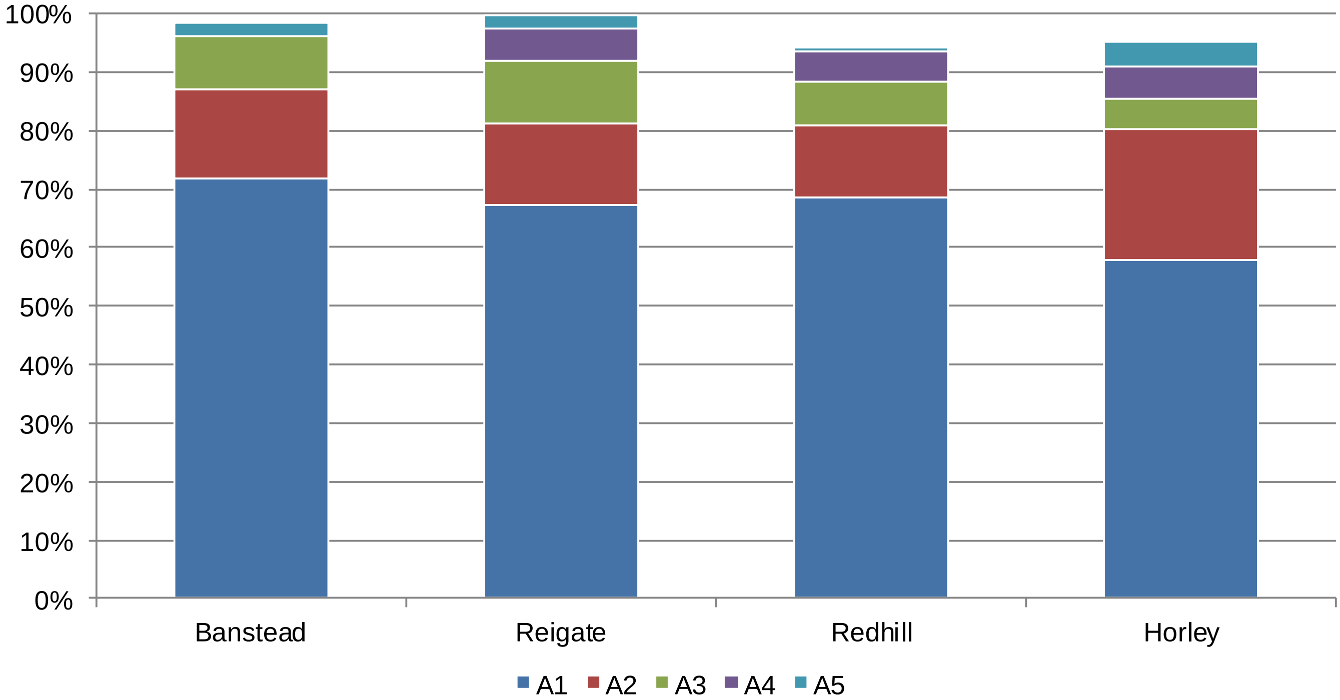
In terms of floorspace, almost half (45%) is in Redhill, highlighting its position as the borough's primary town centre. Reigate has 22% of the floorspace followed by Horley (19%). Banstead is the borough's smallest town centre and accounts for 14% of the total retail floorspace. Just over 30% of units 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



In terms of unit size (as determined by net retail floorspace), there is a clear difference between the four town centres as shown in figure two below. As the major retail destination in the borough, Redhill has a far higher percentage of larger units with 56% of units 100 sqm or larger. Conversely, the other three town centres have higher percentage of units under 100sqm; Banstead (73%), Horley (71%) and Reigate (68%). Whilst Reigate is the secondary town centre, its valued character has a clear impact upon retail unit size, 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

According to the British Retail Consortium UK retail sales values in September 2012 were up by 1.5% compared with September 2011. Total retail sales in the UK were up 3.4% in September 2012 against a 2.5% rise in September 2011. This shows the first return to growth in retail sales values for 2012, as a result of increased sales in clothing and footwear. These sales figures bring much needed relief to retailers, after a turbulent year.

The latest figures published by ONS for August 2012, shows that retail sales volumes have increased by around 2.7% compared with August 2011. Most noticeably in non food sales and volumes, which still remain higher than food sales and volumes, both were up by 3.8% and 5%. Food values increased by 3% whilst food volumes only saw a slight increase by 0.9% compared to August 2011. Sales values were up on all non food categories with the exception of household goods which saw a slight drop in sales in August 2012 compared to the previous year.

Research by the Local Data Company (LDC) found on average 14.6% of retail shops were vacant in Britain in August 2012. The number of vacant shops found across Britain increased in 2012, apart from London which saw a drop in the number of vacant units compared with 2011. This is largely down to a drop in consumer spending in 2012. Colliers International National Retail Barometer states that the proportion of vacant retail floorspace has increased to 10.4% in April 2012 compared to the previous year. The number of units vacant for more than 12 months as a proportion of total vacant units has dropped to around 51% in April 2012 from 54% in October 2011. Whilst the number of retail units vacant for 6 to 12 months has increased to just over 20% in April 2012 when compared with the 2011 figure (14.1%). These figures highlight the challenges retailers continue to face, as consumers ability to spend has weakened as real disposable income continues to drop.

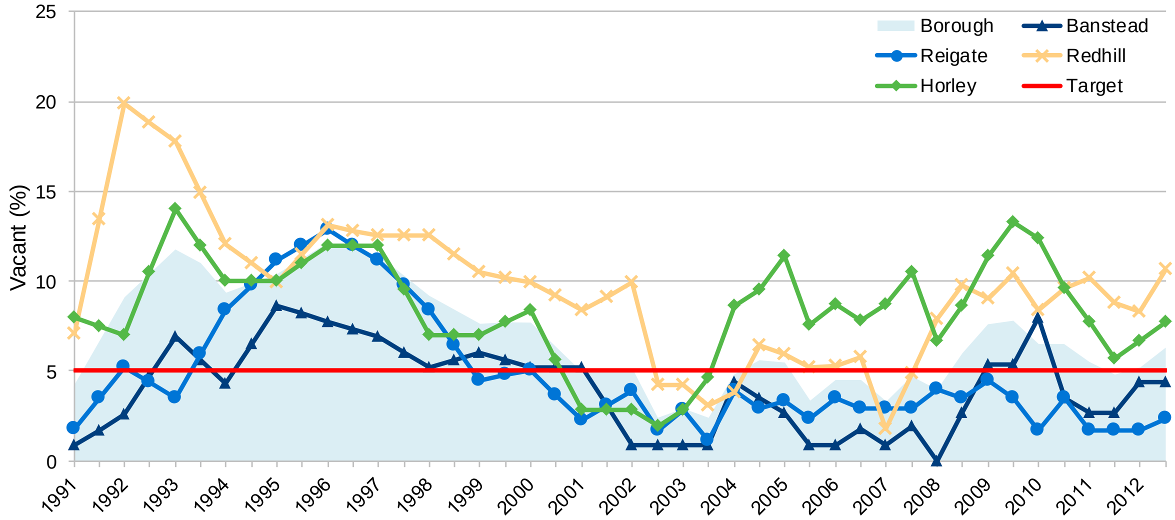
Borough key Messages

- **Vitality:** A1 retail is 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. There is an increasing trend towards premises such as cafés, bars, pubs and restaurants within the town centres, with 14.6% 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 95%.
- **Retail Uses:** Comparison retail 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.
- **Vacancy Rate:** In terms of units, the current vacancy rate across all four town centres is 6.3% (34 units) down from 6.7% in the previous period. Both Banstead & Reigate meet the vacancy target of 5% as set out in the table on page 4. There has been no change in the number of vacant units in Banstead for more than six months. Horley has seen a rise in the number of vacant units to 7.7% over the past six months which includes the loss of another major retailer, Stead & Simpsons. Redhill continues to have the highest vacancy rate at 10.7%. In terms of floorspace, the overall vacancy rate is 6.9% (5,672sqm) and the vacant frontage is 7.0%.
- **New Occupiers:** Twenty two new occupiers moved into premises within one of the four town centres, a slight increase from the previous period. Reigate continues to have the highest number of new occupiers at 8, demonstrating its continued attraction as a retail location, followed by Horley and Redhill both of which had 5 new occupiers move into the town.

Vacancies & New Occupiers

Vacancy Trend

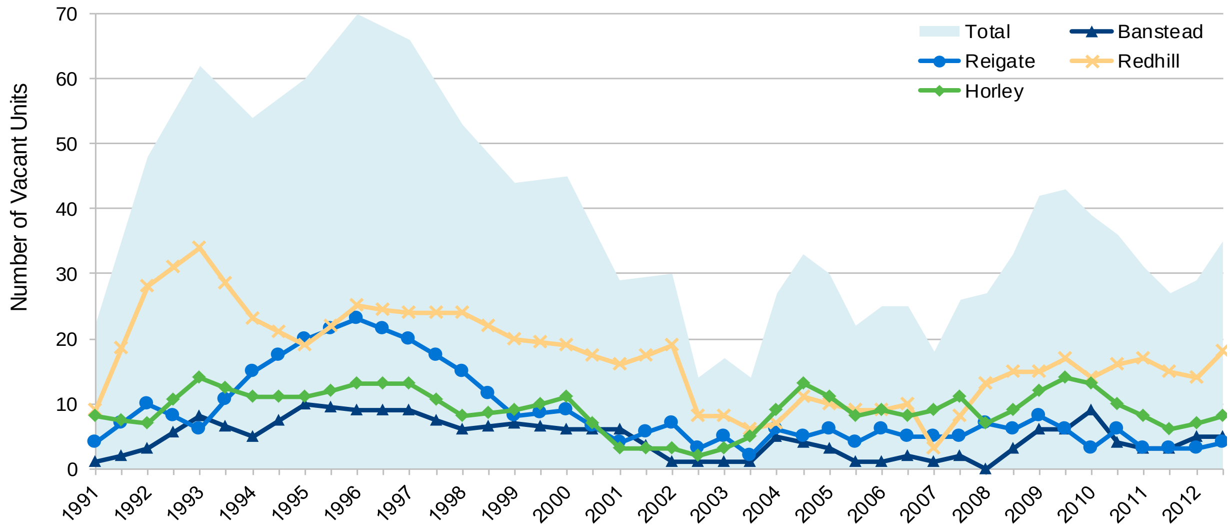
Figure 3 Percentage Vacancy Rate (1991-2012)



Compared to the national picture, all four of the borough's town centres are faring well in terms of vacancy in spite of the ongoing challenges facing high street retailers. This is reflected in the current vacancy rate across the Borough, which has increased over the last six months, up to 6.1% from 5.2% in March 2012.The last six months have further demonstrated the greater resilience of Reigate compared to the other three town centres. Despite seeing a slight increase in the vacancy rate, Reigate still has the lowest vacancy rate at 2.3%. Both Redhill and Horley experienced a significant increase in vacancies, compared to March 2012, whilst Banstead was the only town centre in the borough to see a drop in vacancies, over the last six months. The closure and contraction of major retailers continues to impact upon the borough's town centres, which has seen the recent closure of several larger retailers including Stead and Simpsons in Horley and the loss of Currys and Julian Graves in Redhill.

As with March 2012, two of the centres are still below the 5% vacancy rate target, as set out in the table on page 4.

Figure 4 Number of Vacant Units (1991-2012)



As with the overall vacancy rate, the total number of vacant units across the four town centres has also increased by 5 over the past six months and now stands at 34. There was no change in the number of vacant units in either Banstead or Reigate. However Horley and Redhill experienced an increase in the number of vacant retail units, the biggest increase was in Redhill rising up to 18 units. This needs to be monitored to ensure the vacancy rate does not increase further, which risks threatening Redhill's role as a primary town centre for the borough.

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. The overall percentage of ground floor frontage vacant in the borough's town centres rose again over the past six months from 6.4% to 7.1%.

Across the four town centres there is around 5,600sqm of vacant retail floorspace. Around 68% of this vacant floorspace is in Redhill, whilst Reigate only has just under 2% vacant retail floorspace. Table 1 below summarises the overall town centres vacancy position.

Table 1 Summary of Current Vacancy Position

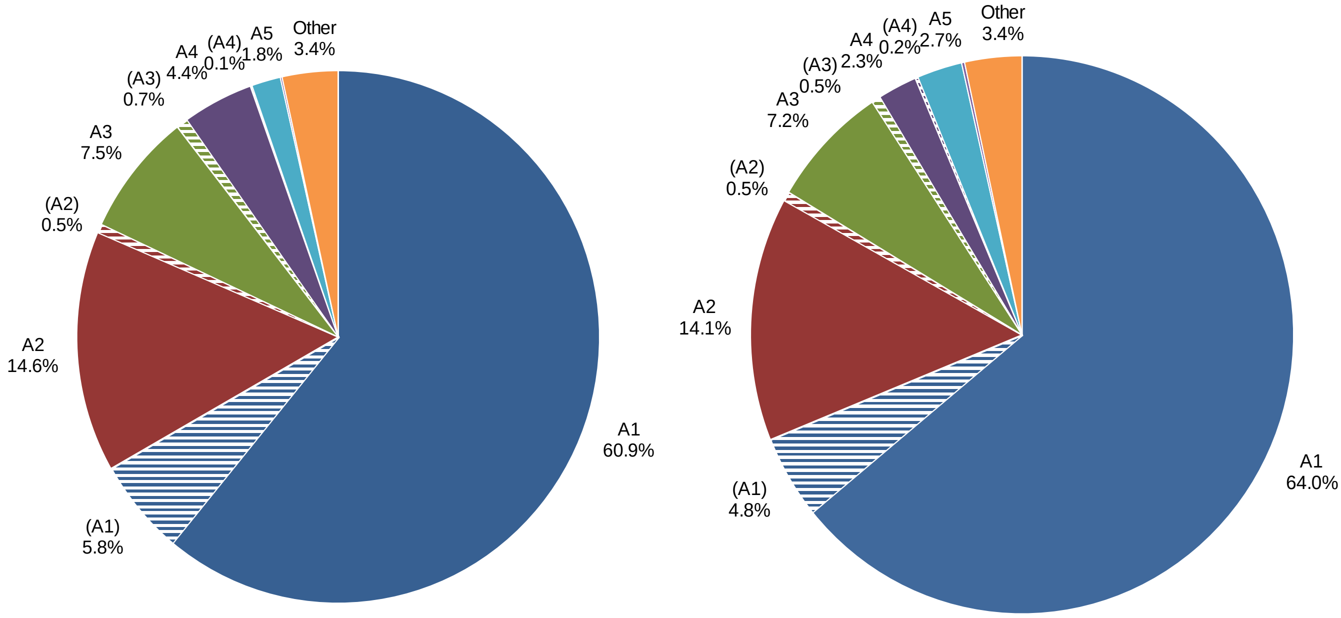
	Total	Vacant	Vacancy Rate
Units/Premises (No.)	559	34	6.1%
Frontage (Metres)	5,354	378	7.1%
Floorspace (Sqm)	88,954	5,672	6.4%

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, 96.6% are in the main retail use classes (A1 to A5) and A1 use alone accounts for almost 70% of premises.

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



The total shopping frontage that makes up the borough's main retail classes (A1-A5) has stayed at 96.6%, of which A1 uses makes up around 67% of the total retail frontage. The proportion of total shopping frontage for A3- A5 uses still remains below 15%.

Out of the four town centres, Reigate still has the highest proportion of frontage occupied by A1- A5 retail (99.6%) closely followed by Banstead (98.3%). Redhill continues to have the lowest proportion of A1-A5 frontage at 94.2%.

In terms of A1 uses, Banstead has the highest proportion of frontage currently in A1 class use at just under 72%, compared with Horley which only has 58%. Reigate still has the highest food and drink uses (A3-A5) accounting for 18.4% of frontage, largely as a result of the high number of restaurants and cafes situated along Church Street and High Street. In Horley (A3-A5) uses makes up 14.9% of total frontage, a large proportion of this is made up of A5 (Hot Food Takeaways) at 4%. This figure is considerably higher compared to the other three town centres.

Figure 6 A1 Retail in Town Centre Units

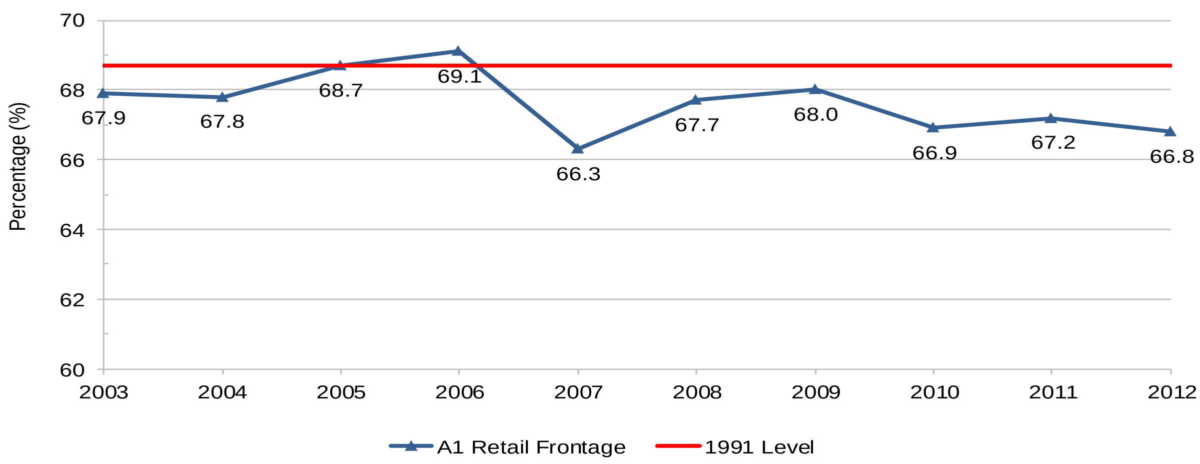


Figure 6 demonstrates that on the whole policies aimed at protecting against excessive loss of A1 premises in town centres have been successful. In 1991, A1 represented almost 69% of total frontage across the four town centres and, although there have been some slight movements over the years; this proportion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

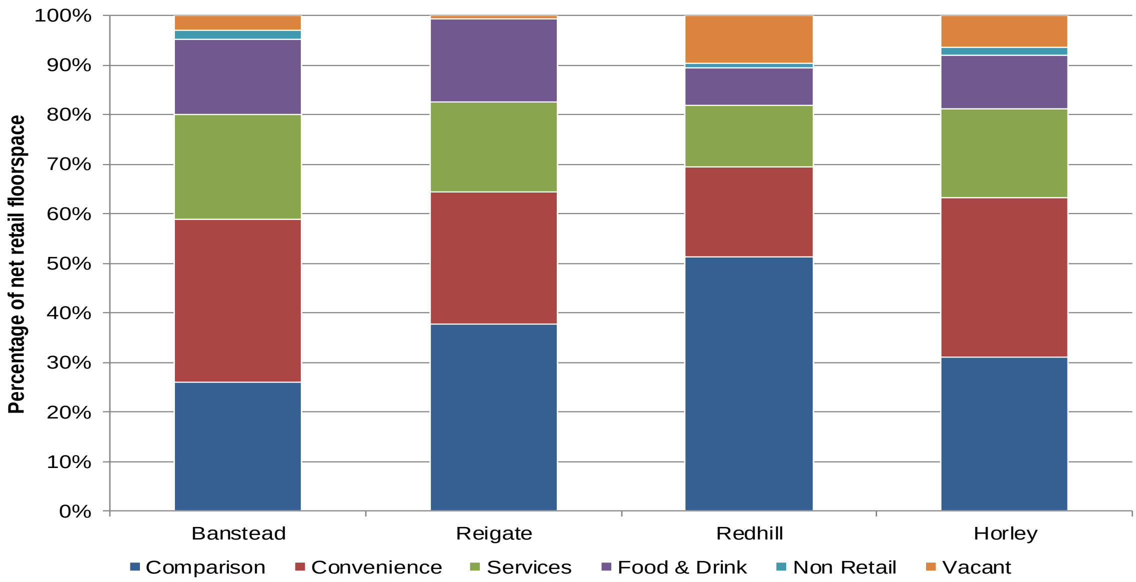
Across the four town centres, comparison retail remains the dominant offer accounting for around 38% of retail units and 41% of net retail floorspace. These figures show no change in comparison retail offer over the last six months. However there has been a slight drop in convenience and service retail offer across the four town centres due to an increase in vacant units (34) and floorspace (6.2%) compared to March 2012. Table 2 shows convenience retail offer accounts for a lower percentage of units at around 9%, but makes up nearly a quarter of the retail floorspace, due to the dominance of larger supermarkets. Conversely, service retail offer makes up the second highest percentage of units across the four town centres at 30%, yet only accounts for around 16% of the total retail floorspace, suggesting that such businesses tend to occupy smaller retail units.

Table 2 Breakdown of Retail Offer

	Units	Floorspace
Comparison	211 (37.7%)	36,135 (40.7%)
Convenience	49 (8.8%)	22,228 (25.0%)
Service	169 (30.2%)	14,159 (15.9%)
Food & Drink Leisure	80 (14.3%)	10,049 (11.3%)
Non-Retail	16 (2.9%)	826 (0.9%)
Vacant	34 (6.1%)	5,557 (6.2%)
Total	**559**	**88,954**

The type of offer varies quite notably across the four centres. As the primary centre and main shopping destination, Redhill has the highest proportion of comparison retail, accounting for just over half of the centres retail floorspace. Mean while, both Banstead and Horley have the highest proportion of convenience and service based floorspace, reflecting their role as district centres serving the needs of the local population.

Figure 7 Retail Offer by Centre



Main Retail Categories

Table 3 below shows the retail categories on offer within the borough's four town centres. Hairdressers, nail salons, etc remain the dominant service retailers across the boroughs four town centres, with Banstead and Reigate having the highest percentage at around 10% and 8% respectively.

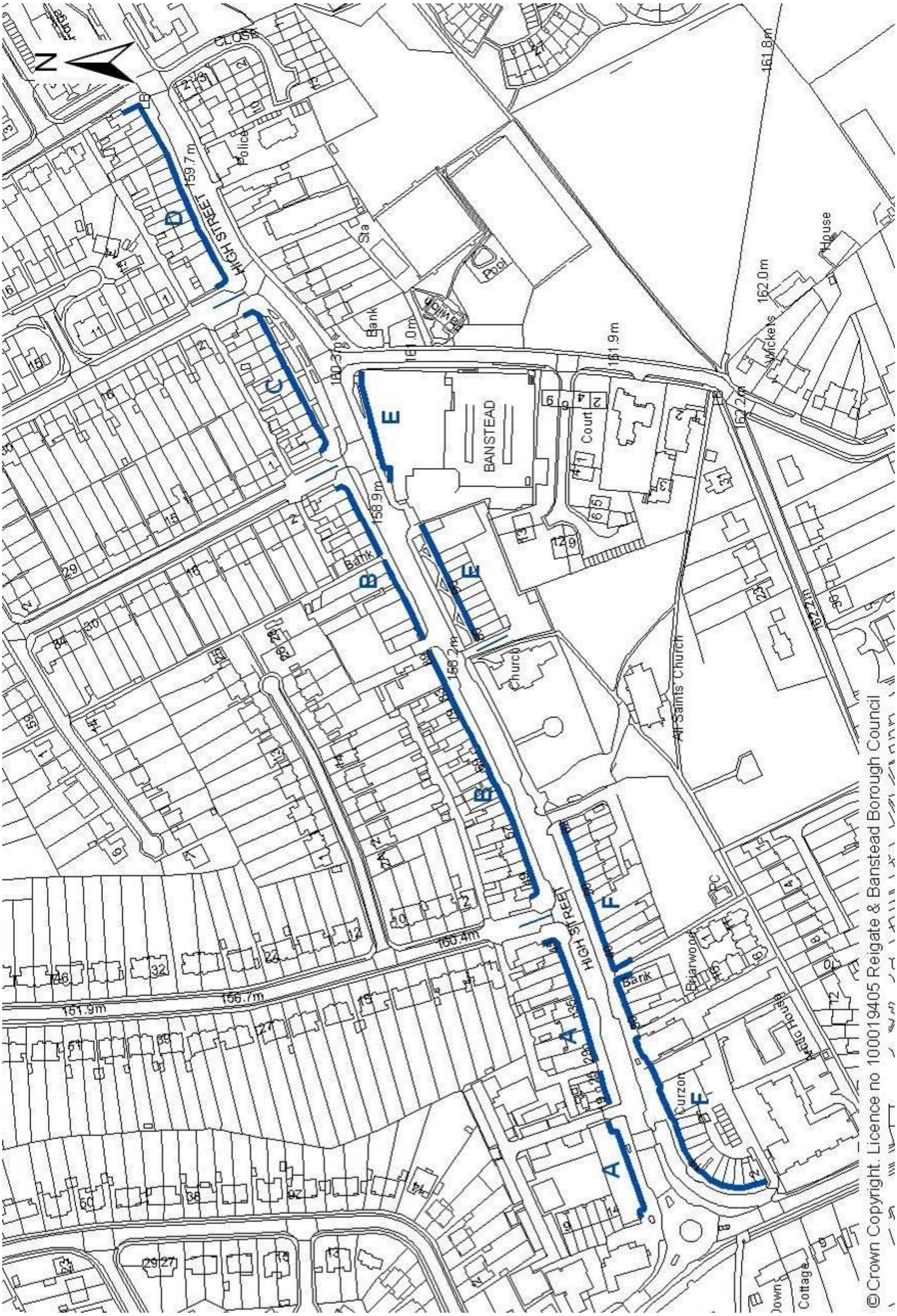
Out of the four town centres in the borough, Reigate has the highest number of shops selling clothing, footwear and accessories, accounting for just under half of the town centre's total comparison retail offer. However, clothing, footwear and accessories retailers only account for around 9% of Redhill's total comparison retail, despite Redhill being the primary town centre in the borough. Horley on the other hand continues to have a lower proportion of comparison retail units compared to the other three town centres. Although this reflects that the town centre has a relatively low catchment, it could impact upon the town centre's long term vitality and viability. However Horley along with Banstead both have a higher percentage of convenience premises, in particular with supermarket provision, reflecting their role more as district centres serving the local catchment.

Across the borough, food & drink establishments continue to account for almost 15% of premises. Reigate has the highest number of restaurants, pubs, etc, while Horley continues to have the most takeaways.

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	7	16	3	2	28
Electronics & Technology	2	3	8	1	14
Charity/Second-Hand	6	6	7	8	27
Toys, Games & Sports	0	3	3	0	6
Other Comparison Retail (e.g. Gifts, Florists)	8	14	20	6	48
Total Comparison	**41 (36.0%)**	**80 (46.5%)**	**64 (37.9%)**	**26 (25.0%)**	**211 (37.7%)**
Convenience					
Food/Supermarket	8	6	5	8	27
Newsagents	1	3	4	3	11
Chemist/Pharmacy	4	1	3	3	11
Total Convenience	**13 (11.4%)**	**10 (5.8%)**	**12 (7.1%)**	**14 (13.5%)**	**49 (8.8%)**
Service					
Travel Agents	2	1	2	0	5
Hair & Beauty	12	13	11	10	46
Opticians	4	5	6	1	16
Banking	6	7	8	6	27
Estate Agents	6	11	6	8	31
Bookmakers	2	1	4	2	9
Dry Cleaning	2	3	2	2	9
Other Services (e.g. Employment, Repairs)	5	7	9	5	26
Total Service	**39 (34.1%)**	**48 (27.9%)**	**48 (28.4%)**	**34 (32.7%)**	**169 (30.2%)**
Food & Drink Establishments					
Restaurant	9	13	6	5	33
Take-away	3	3	3	5	14
Café/Sandwich Bar	3	7	7	3	20
Pub/Club	0	6	3	4	13
Total Food & Drink Establishments	**15 (13.2%)**	**29 (16.9%)**	**19 (11.2%)**	**17 (16.3%)**	**80 (14.3%)**
Non A Class	1 (0.9%)	2 (1.2%)	8 (4.7%)	5 (4.8%)	16 (2.9%)
Vacant	5 (4.4%)	3 (1.7%)	18 (10.7%)	8 (7.7%)	34 (6.1%)
TOTAL	**114**	**172**	**169**	**104**	**559**

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

As can be seen in Figure 8, primary retail uses (A1-A5) accounts for 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 72% of the frontage in A1 use against the 75% requirement.

With regards to offer, Banstead Village has the second highest proportion of retail floorspace offering food & drink leisure retail at 15% whilst convenience retail provides just under 33% of the town's total floorspace. This further highlights the centre's role in serving the needs of a more local catchment, as opposed to providing 'destination' retail.

Figure 8 Breakdown of Use Classes (Frontage)

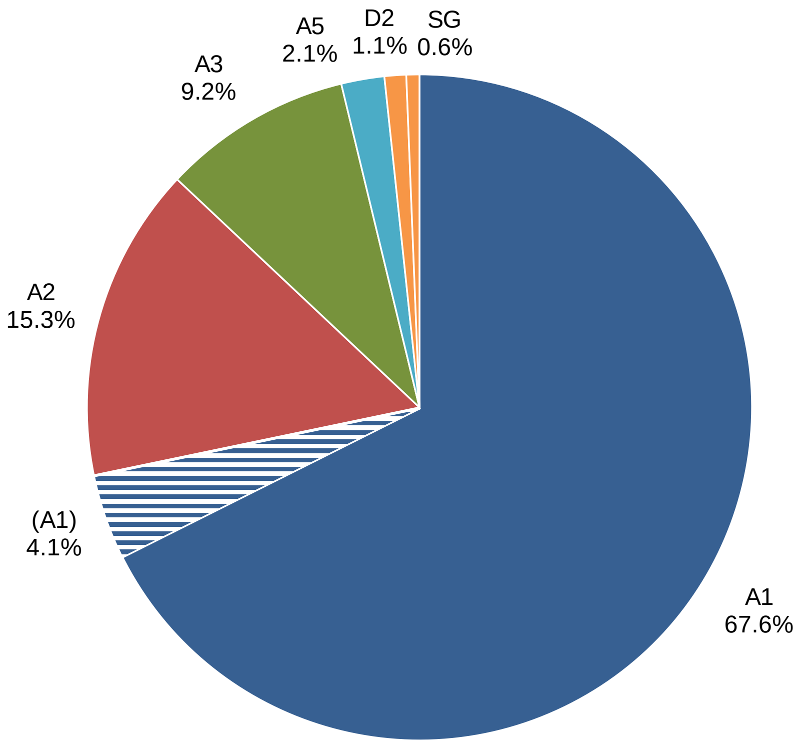


Table 4 Retail Offer

	Units	Floorspace
Comparison	41 (36.0%)	3,197 (26.1%)
Convenience	13 (11.4%)	4,038 (32.8%)
Service	39 (34.1%)	2,612 (21.2%)
Food & Drink Leisure	15 (13.2%)	1,869 (15.2%)
Non-Retail	1 (0.9%)	210 (1.7%)
Vacant	5 (4.4%)	372 (3.0%)
Total	**114**	**12,298**

Vacancies & New Occupiers

The number of vacant units within Banstead Village has stayed at 5 over the past six months.

	Vacancy Rate
% of units	4.4%
% of frontage	4.1%
% of net retail floorspace	3.0%

Banstead Village vacant frontage and net retail floorspace remains below the 5% threshold. Net retail floorspace vacancy has dropped below the 5% threshold during the last six months. This is partly due to the split of one large retail unit previously occupied by Milners into a double and single retail unit. The single unit is now occupied by M & S Carpets and Flooring, however the double unit is still vacant.

Four new occupiers moved into the town centre during the last 6 months, three of which moved into vacant units and one into a previously occupied unit. In addition, two units became vacant since the closure of Johnson's Dry Cleaners and Lillifoot.

Development & Use Class Changes

There were no changes of use over the past six months.

However, there has been a small change to 143-147 High Street previously occupied by Milners, this included the separation of treble shop unit back to one double (143-145) and one single unit. The latter, 147 High Street, is now occupied by M & S Carpet and Flooring.

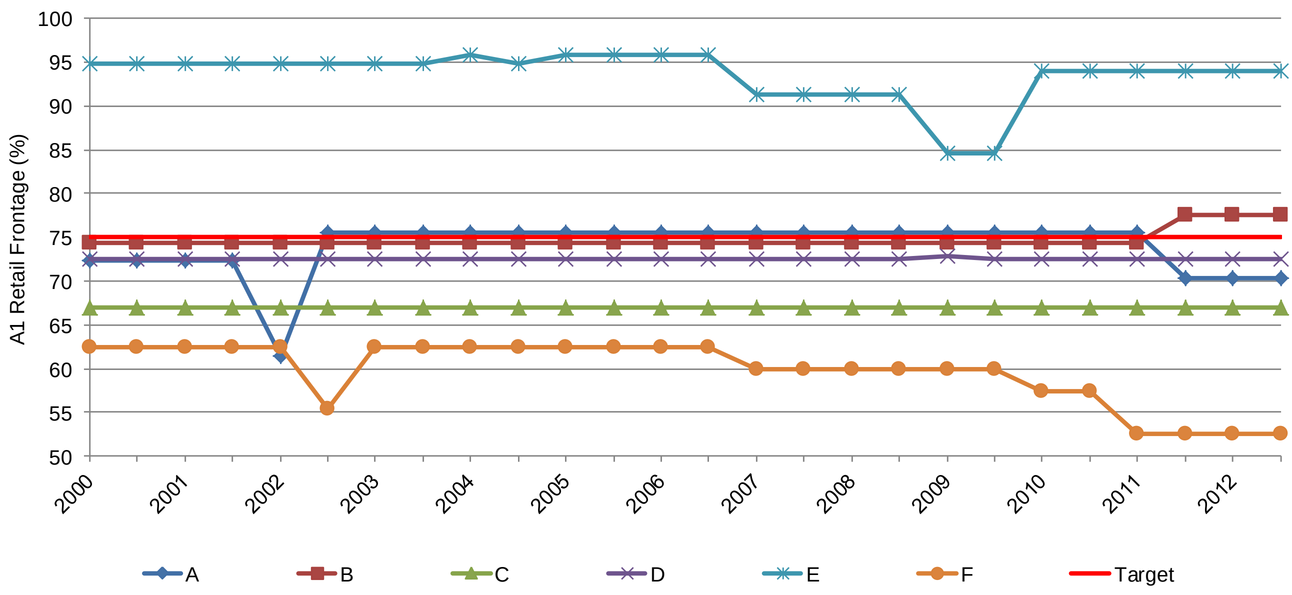
Frontages

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.

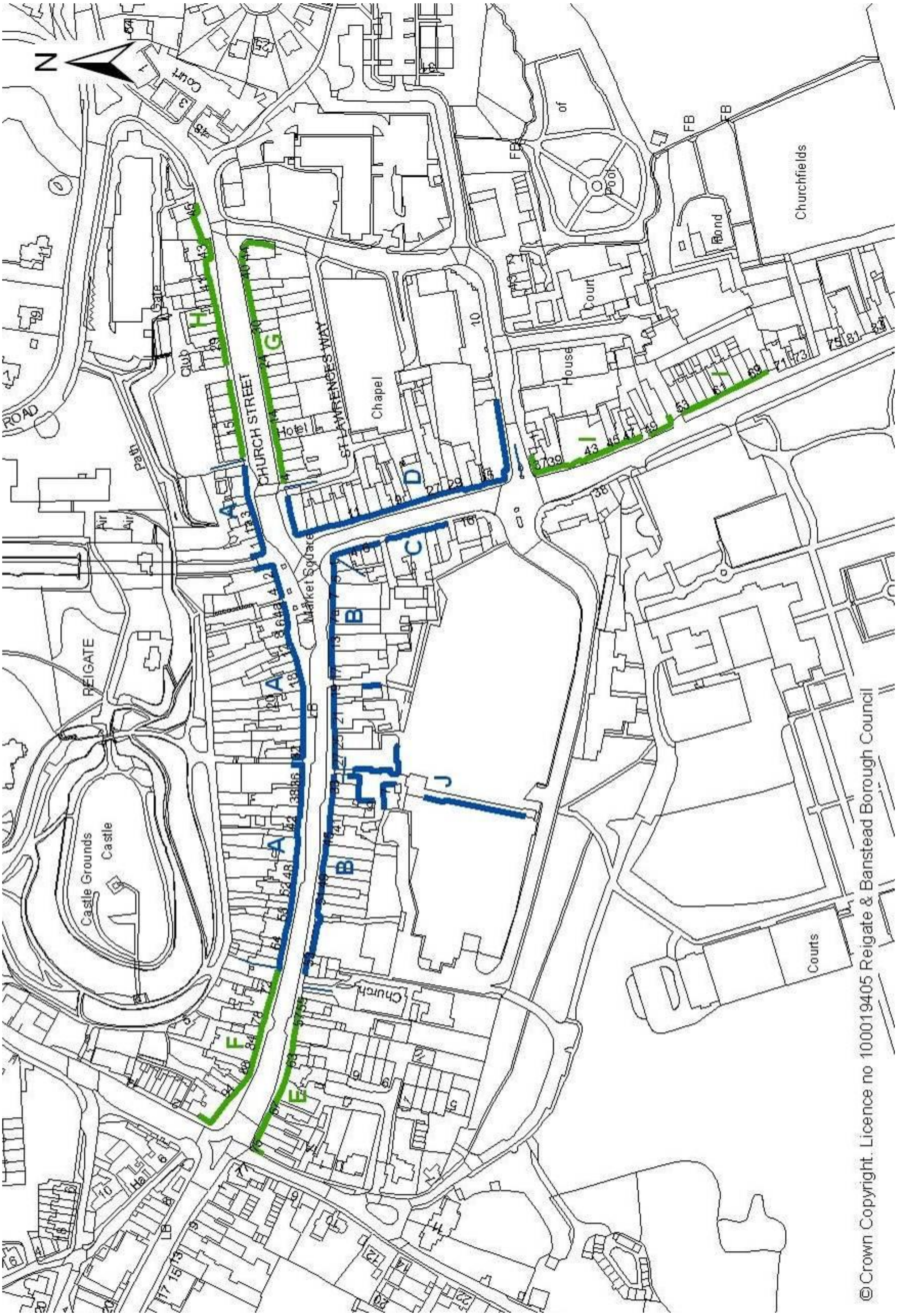
Frontage B also exceeds the 75% threshold, whilst the proportions of A1 at frontages (A & D) are still only just below the required level.

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.

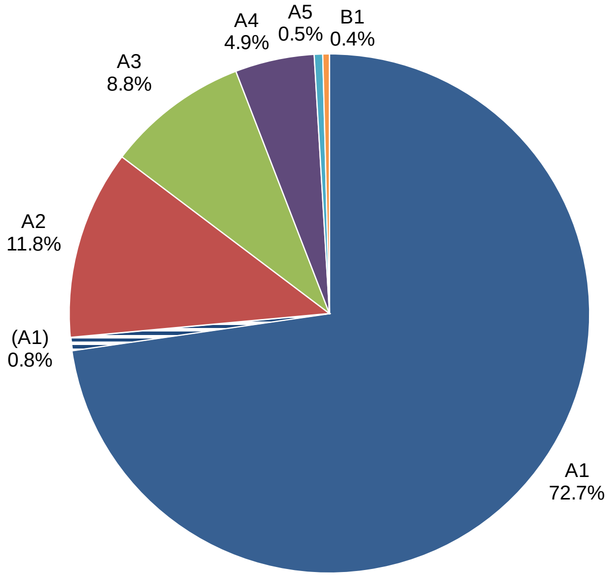
The three main shopping streets are oriented around the attractive focal point of the Old Town Hall. Reigate Town Centre has a vibrant mix of independent boutique clothing units, complemented by a good selection of cafés and restaurants. The centre has two foodstores, the smaller Marks & Spencer store 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, this occupies around 17% of the town's retail units and 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 gifts, clothing, footwear and accessories, which when combined together account for 59% of the total retail premises.

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



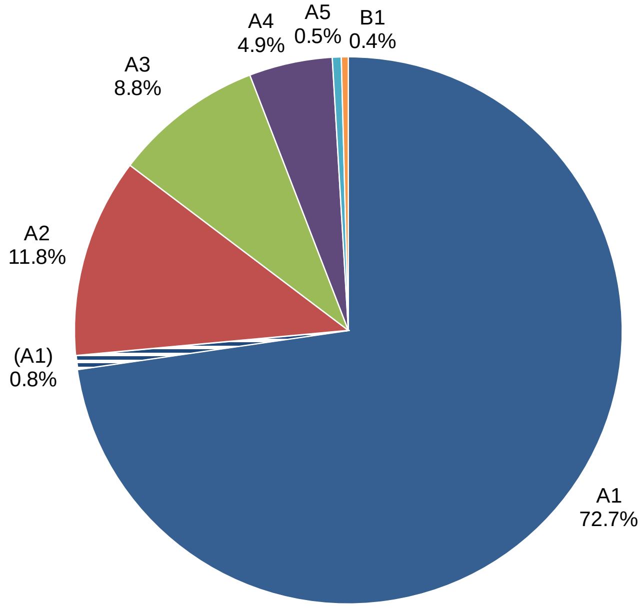


Table 5 Retail Offer

	Units	Floorspace
Comparison	80 (46.5%)	7,464 (37.6%)
Convenience	10 (5.8%)	5,305 (26.7%)
Service	48 (27.9%)	3,667 (18.5%)
Food & Drink Leisure	29 (16.9%)	3,287 (16.5%)
Non-Retail	2 (1.2%)	0 (0.0%)
Vacant	3 (1.7%)	136 (0.7%)
Total	**172**	**19,859**

Vacancies & New Occupiers

Reigate was the only town centre where the number of vacant units dropped from 4 to 3 units over the past six months and now represents 1.7% of the total vacant units. The town centre continues to have the lowest vacancy rate compared to the remaining three. Similarly there has been no change in the percentage of Reigate's vacant floorspace and frontage since the last monitor was published.

	Vacancy Rate
% of units	1.7%
% of frontage	1.4%
% of net retail floorspace	0.7%

A number of occupiers have moved in and out of Reigate. In total, eight new occupiers moved into the town centre, two of which are currently fitting out. This includes Whistle, and the existing Designer Nails & Beauty Studio expanding into 44B Church Street, which was previously vacant. Five of the new occupiers took previously occupied units and two took previously vacant units. A total of 3 retail units are vacant, two of which have become vacant within the last six months. Reigate town centre has a total of around 136 sqm vacant retail floorspace.

Development & Use Class Changes

There have been no changes of use over the past six months.

Over the last six months the following planning permissions have now been implemented and are now in use. These are listed below:

- The redevelopment of the second floor suite at 40-44 High Street is now complete and occupied by Chart Clinic (Osteopathy and Sports Massage Clinic - D1)
- 51B High Street has been fitted out as a gymnasium adding 730 sqm of leisure space (D2) to the town centre.
- 41 Bell Street is complete and currently occupied by Bell Street Bistros – restaurant (A3), providing a 500 sqm A3 retail unit

These completions have added to the facilities and services on offer in Reigate town centre by bringing vacant units back into use.

Planning permission has been granted for the following units. To date development has not commenced on either of the permissions.

- 11/02227/CU – Conversion of 25-29 Church Street from D2 use 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, adding 106 sqm of B1 (A) use.

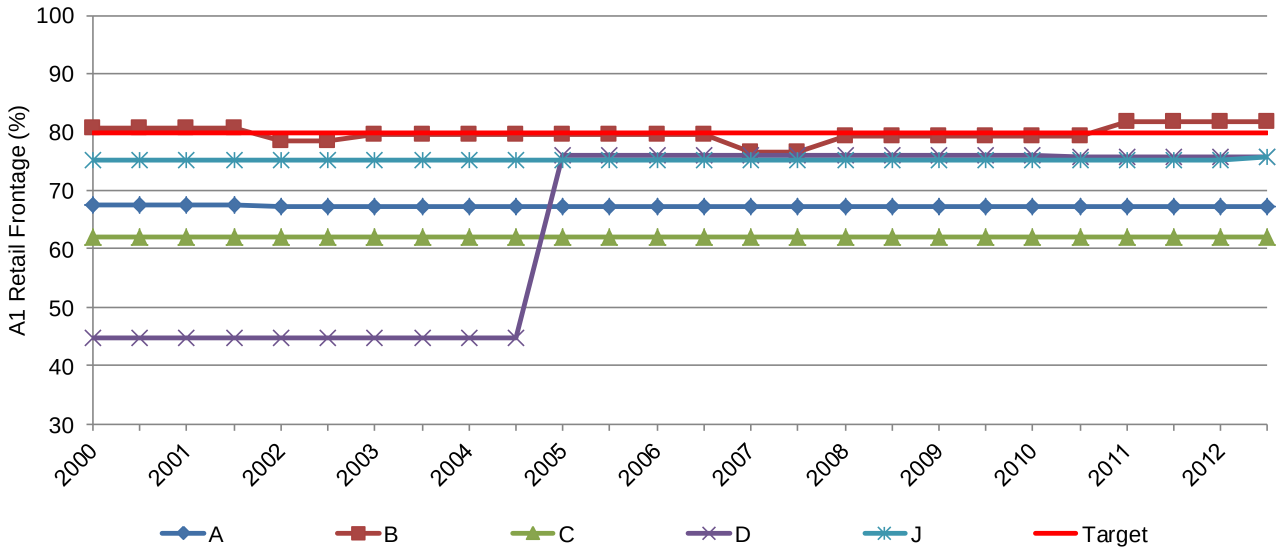
Frontages

Primary

Frontage B continues to be the only area which achieves the 80% threshold for A1 frontage. Frontages D & J both continue to fall slightly under the A1 requirement at (75%). There has been no change in these figures over the last five years.

Frontages A & C still fall significantly below the A1 retail use target of 80%. Frontage C suffers from a high number of estate agents whilst Frontage A has a couple of non-A1 units with particularly long frontages.

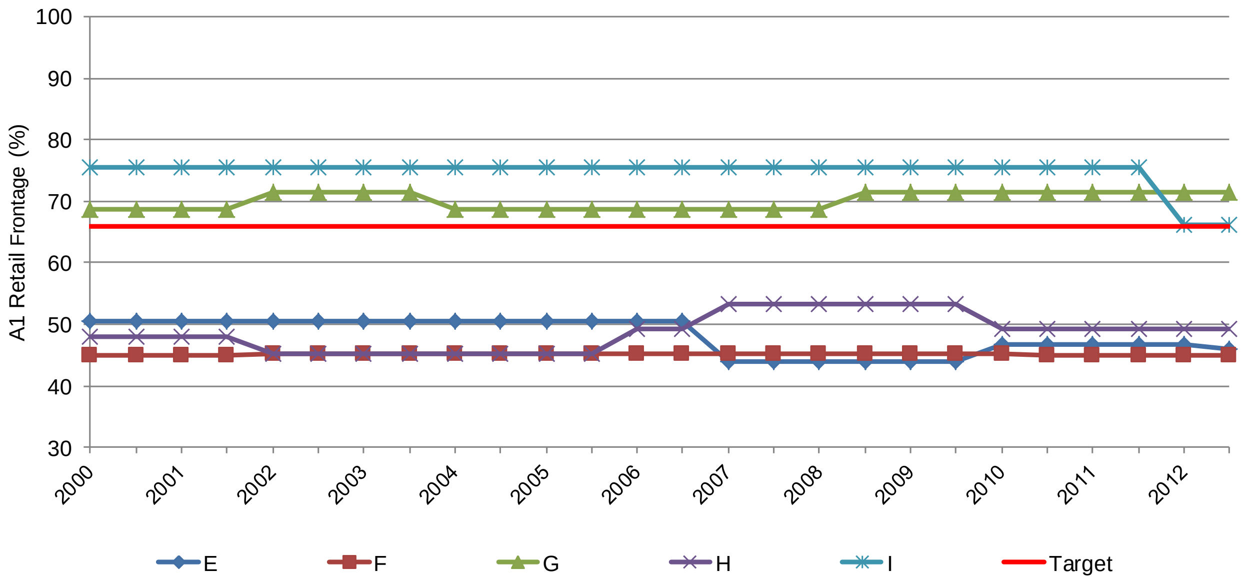
Figure 11 Reigate Primary Frontage A1 Retail Trend



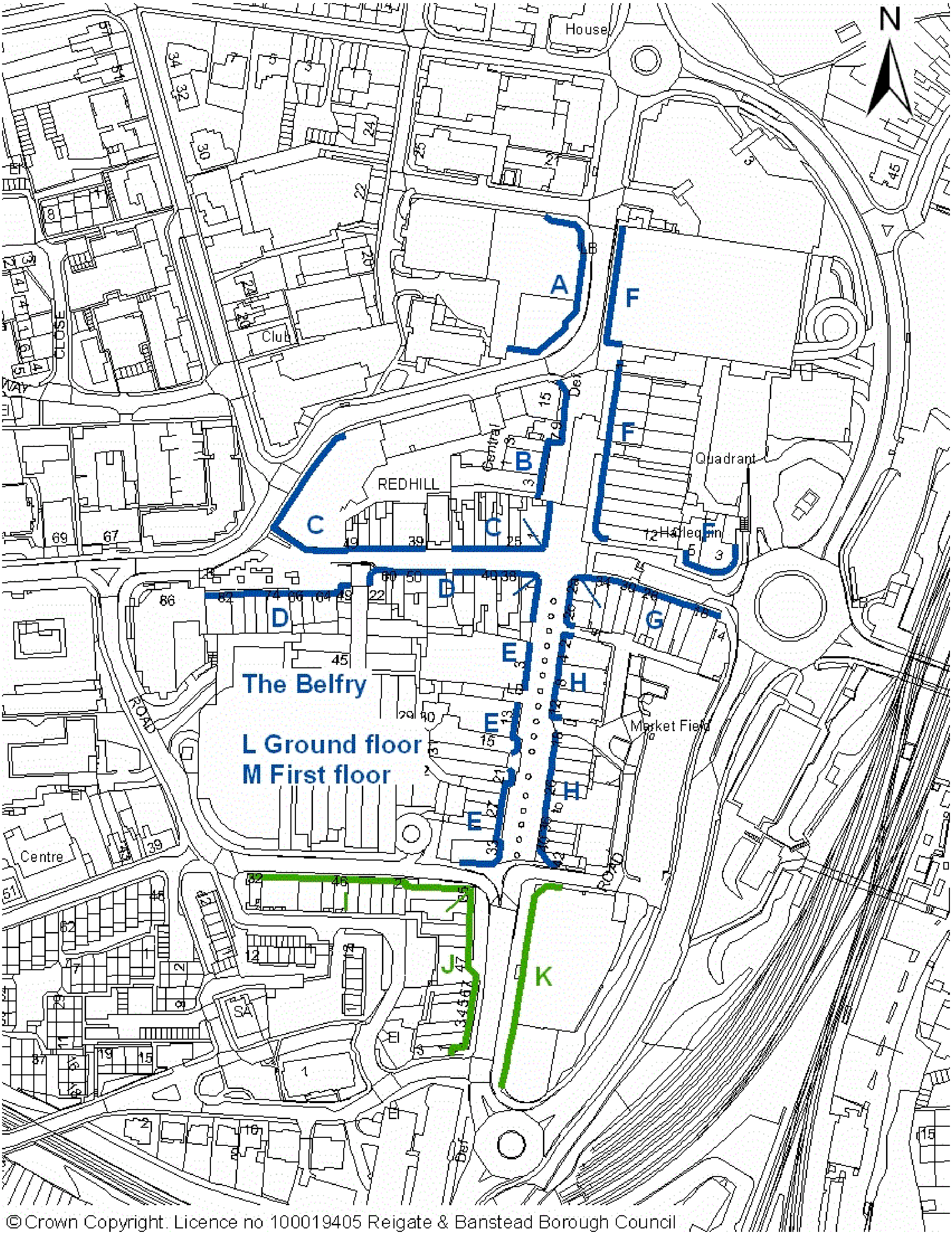
Secondary

Figure 12 shows both frontages G & I continue to exceed the 66% A1 requirement and have done so for the past decade. All of the secondary frontages have stayed the same in terms of A1for four consecutive years now. Frontages E, F & H all continue to 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 pedestrianised High Street which runs from north to south, with a series of smaller shopping streets running off of this, as well as the Belfry shopping centre in the south-western quadrant. It is recognised that the public realm and townscape within the centre is in need of continuing attention, to extend the upgrade of the southern end of the High Street and Station Road. Redhill Town Centre is also home to the Harlequin Theatre.

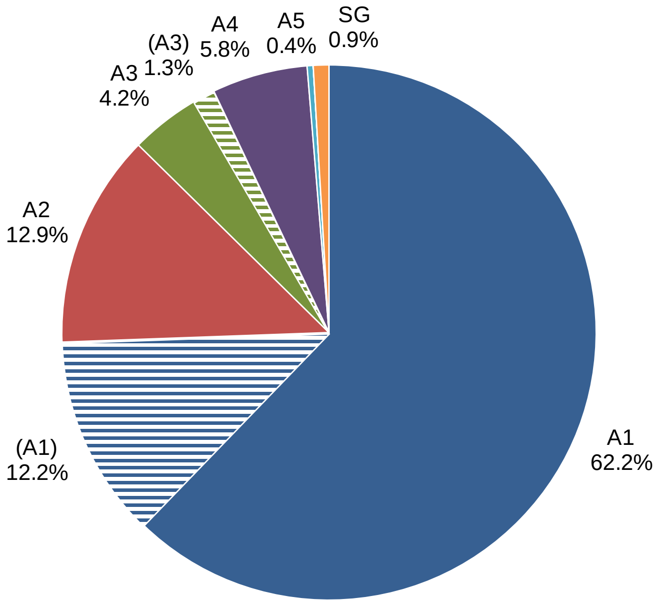
The regeneration of Redhill continues to gather pace following on from the redevelopment of a number of sites, including Red Central, Kingsgate House and Nobel House. Planning permission has been granted for a multi-million pound redevelopment of Warwick Quadrant, which will include a larger Sainsbury's supermarket, a 92 bedroom hotel, 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.

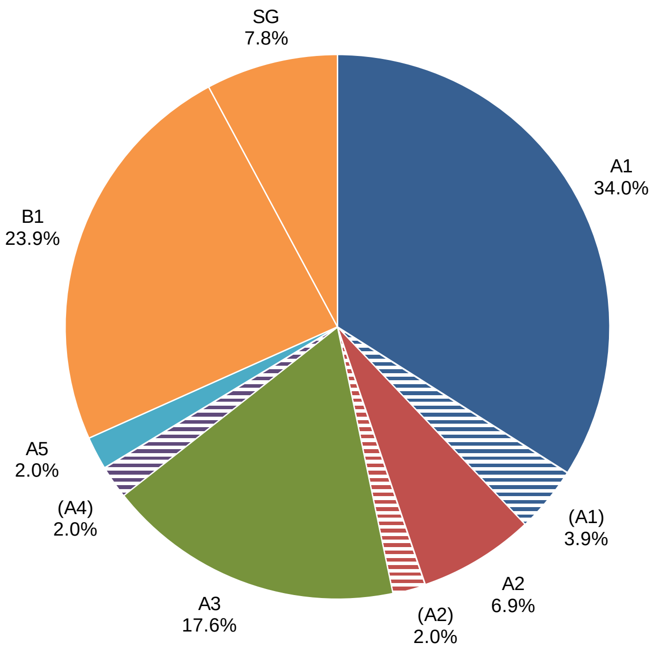
Vitality

Retail (A1 to A5) uses constitute 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 has only 68%.

Both the primary and secondary frontages miss the A1 requirement, with the primary frontage having 74% (against 80% target) and the secondary only 38% (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. However there has been an increase in the proportion of vacant primary retail frontage over the last six months, rising to 12%, most noticeably within the Belfry Shopping centre since the recent closure of Currys and Julian Graves.

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





Only comparison retail is still 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 7.7% 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 the secondary frontages that could be a positive asset to the town centre.

Table 6 Retail Offer

	Units	Floorspace
Comparison	64 (37.9%)	20,380 (51.2%)
Convenience	12 (7.1%)	7,250 (18.2%)
Service	48 (28.4%)	4,931 (12.4%)
Food & Drink Leisure	19 (11.2%)	3,054 (7.7%)
Non-Retail	8 (4.7%)	306 (0.8%)
Vacant	18 (10.7%)	3,854 (9.7%)
Total	**169**	**39,775**

Vacancies & New Occupiers

The number of vacant retail units in Redhill increased sharply from 14 to 18. Out of all the main centres in the borough, Redhill continues to have the highest percentage of vacant retail units and this has been the case for more than six months.

	Vacancy Rate
% of units	10.7%
% of frontage	12.2%
% of net retail floorspace	9.7%

A total of five new occupiers have moved into Redhill Town Centre over the past six months, three into previously vacant retail units. A further two new occupiers moved into previously occupied retail units, these include Topman and Peri Peri (takeaway). Eighteen units are currently vacant in Redhill town centre, of which six units became vacant within the last six months; this includes the recent loss of Curry's, Julian Graves and one of the Clinton Cards shops. The remaining 12 units have been vacant for more than six months. This further emphasises the need to monitor retail performance in the town centre over the next six months, 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

There has been one change of use over the past six months. The Cheque Centre (A2) moved into 39 High Street which was previously a vacant (A1) retail unit. It is also understood that one of the A1 retail units on Queensway will be occupied by Co-Op in the near future.

Following the signing of a section 106 agreement, planning permission (ref: 11/00212/F) has been granted for the redevelopment of the existing Sainsbury's store on London Road. The new development will provide an extended foodstore, new gym and a 98 room hotel along with townscape and public realm improvements in the town centre and 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 currently being considered by the council.

Planning permission has been granted (ref: 12/00477/F) to redevelop the former Liquid & Envy nightclub. The proposed development will consist of a ground floor retail unit (A1/ A2) and 47 residential units.

Frontages

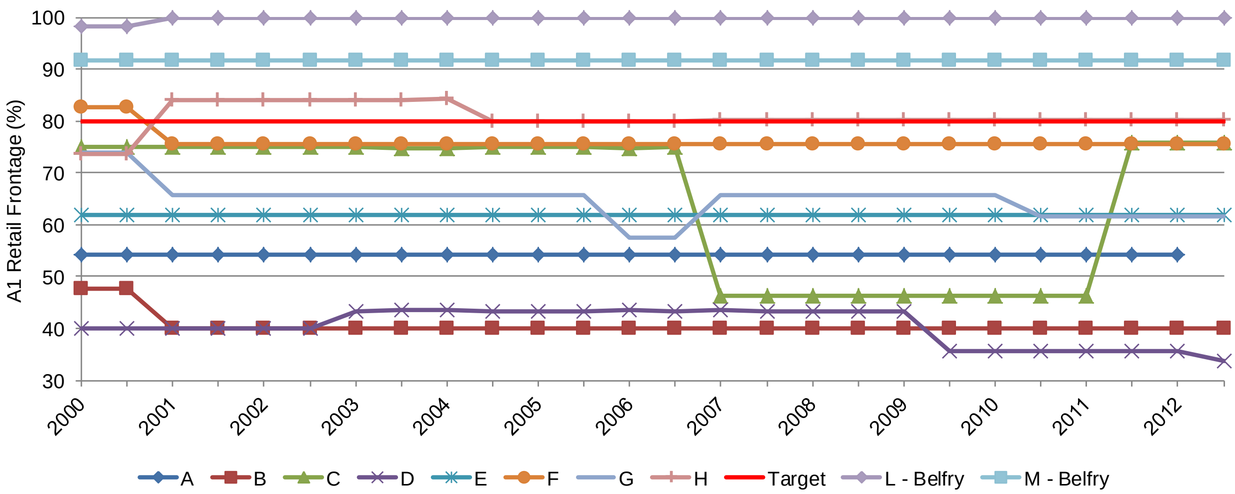
Primary

Frontages L & M represent the two levels within the Belfry Shopping Centre. 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. Both frontages C & F fall just below the target at 76%, with A1comparison retail premises making up the majority of both frontages.

The remaining primary frontages still continue to fall considerably below the target. Particular cause for concern is with frontages B & D, 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.

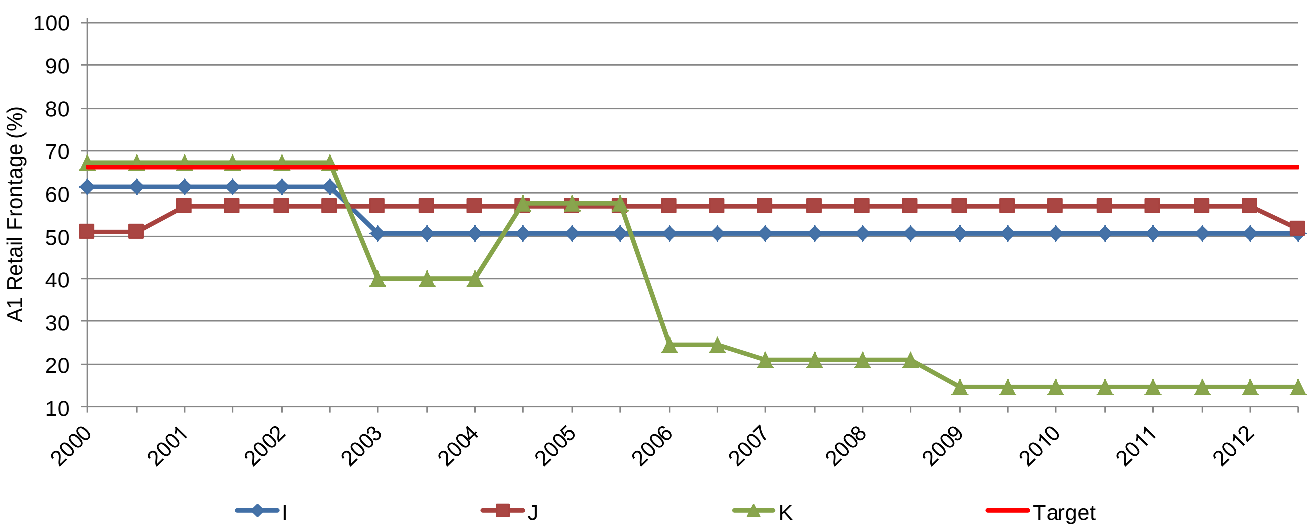
Figure 14 Redhill Primary Frontage A1 Retail Trend



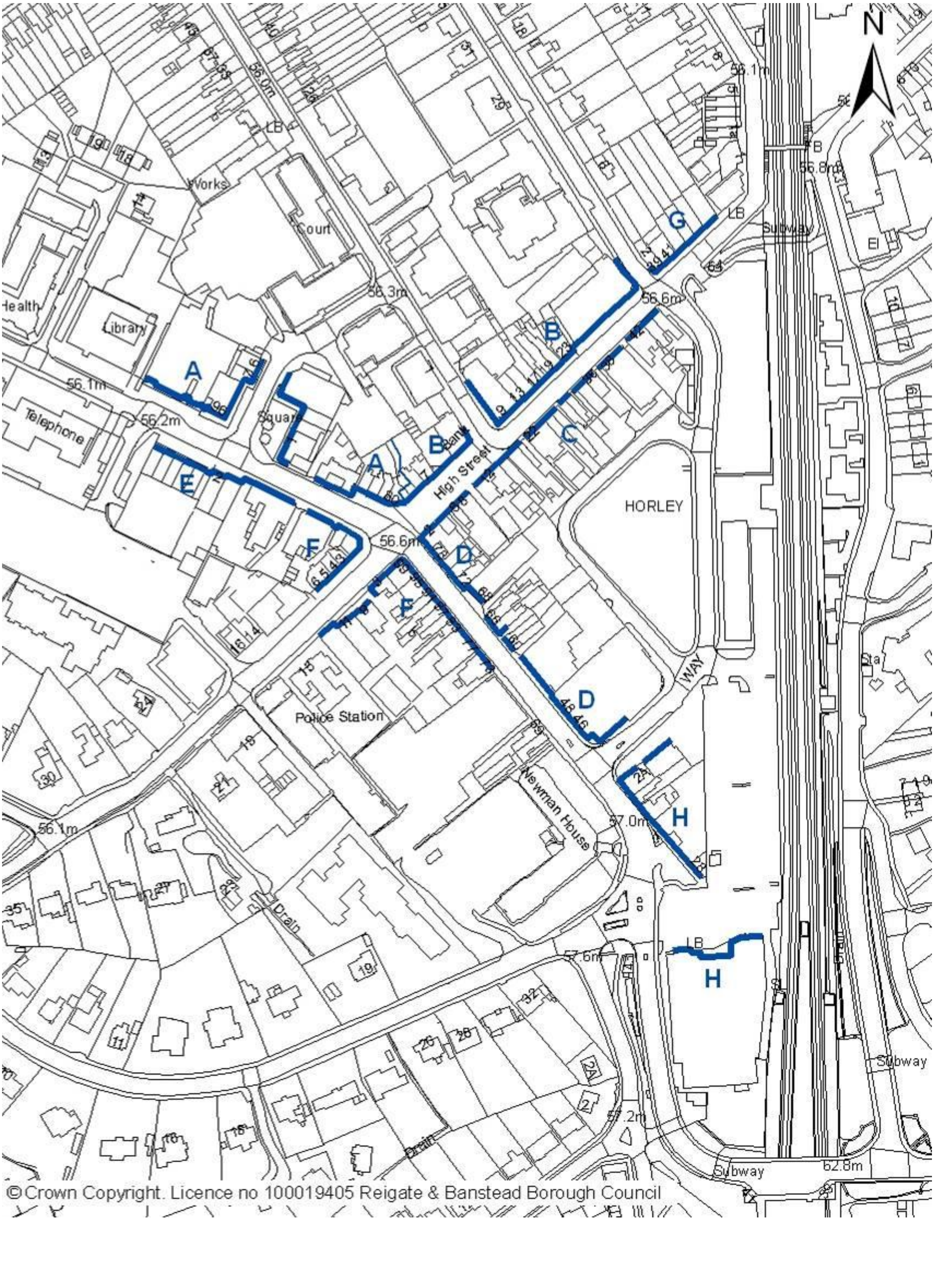
Secondary

All of the secondary frontages continue to fall below the 66% requirement. Frontages I & J are only just below the target. However, the proportion of A1 uses in Frontage K (15%) is still very low, largely as a result of the Kingsgate and Red Central office developments 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.

Figure 15 Redhill Secondary Frontage A1 Retail Trend



Horley Town Centre



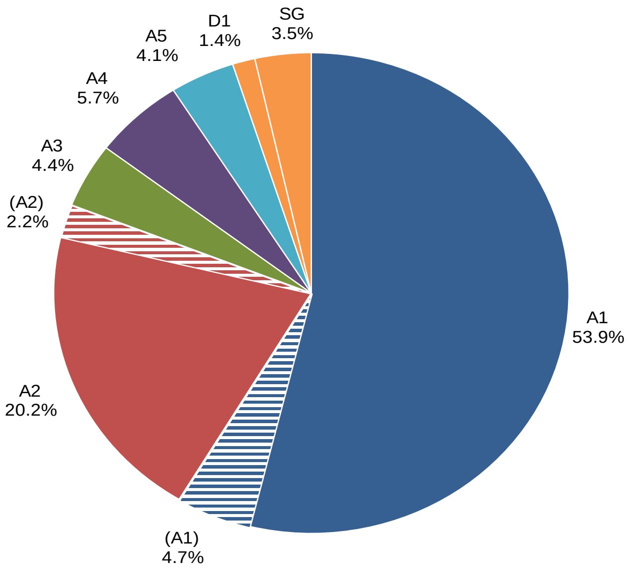
Commentary

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.

Vitality

The main retail uses (A1-A5) account for 95% of the total frontage within Horley Town Centre. However, at around 59%, the proportion of frontage in A1 use is by far the lowest of the four centres. Food & drink retail use (A3-A5) is still the prominent retail frontage within Horley Town Centre, making up around 14% of the centre's total retail frontage.

Figure 16 Breakdown of Frontage by Use Class



Of all the town centres, Horley has by far the second lowest proportion of comparison retail floorspace at around 30%. One third of Horley's retail floorspace is occupied by convenience and this continues to be the highest proportion out of all the four town centres. A further 17% of floorspace offers service based retail. These two figures in particular, reflect its role as a district centre serving a local catchment. Horley continues to have the highest proportion of takeaways and charity shops compared with the other three town centres, both of which are a concern for the long term viability of Horley town centre. 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
Comparison	26 (25.0%)	5,094 (29.9%)
Convenience	14 (13.5%)	5,636 (33.1%)
Service	34 (32.7%)	2,949 (17.4%)
Food & Drink Leisure	17 (16.3%)	1,839 (10.8%)
Non-Retail	5 (4.8%)	311 (1.8%)
Vacant	8 (7.7%)	1,195 (7.0%)
Total	**104**	**17,024**

Vacancies & New Occupiers

Over the last six months the number of vacant retail units in Horley has increased from 7 to 8 units. At 7.7% of units, Horley still has the second highest vacancy rate behind Redhill. As a total percentage, Horley's vacancy rate is above the borough's target in terms of, vacant units, frontage and net retail floorspace.

	Vacancy Rate
% of units	7.7%
% of frontage	7.8%
% of net retail floorspace	7.0%

Five new occupiers have moved into Horley over the past six months, two occupying previously vacant units, whilst a further three have taken over previously occupied units. Over the same period three units have become vacant including the notable loss of Stead & Simpsons. Five units continue to remain vacant and have done so for more than six months, a couple of which are larger retail units, previously occupied by Peacocks and Stead & Simpsons. This highlights how retail demand needs to be monitored over the coming year in terms of changes to the retail offer and to vacant units. Where possible it is desirable to encourage new occupiers to move into the town centre so that Horley town centre can continue to fulfil its main role as a convenience and service centre.

Developments & Use Class Changes

In the last six months no new developments have occurred in Horley town centre.

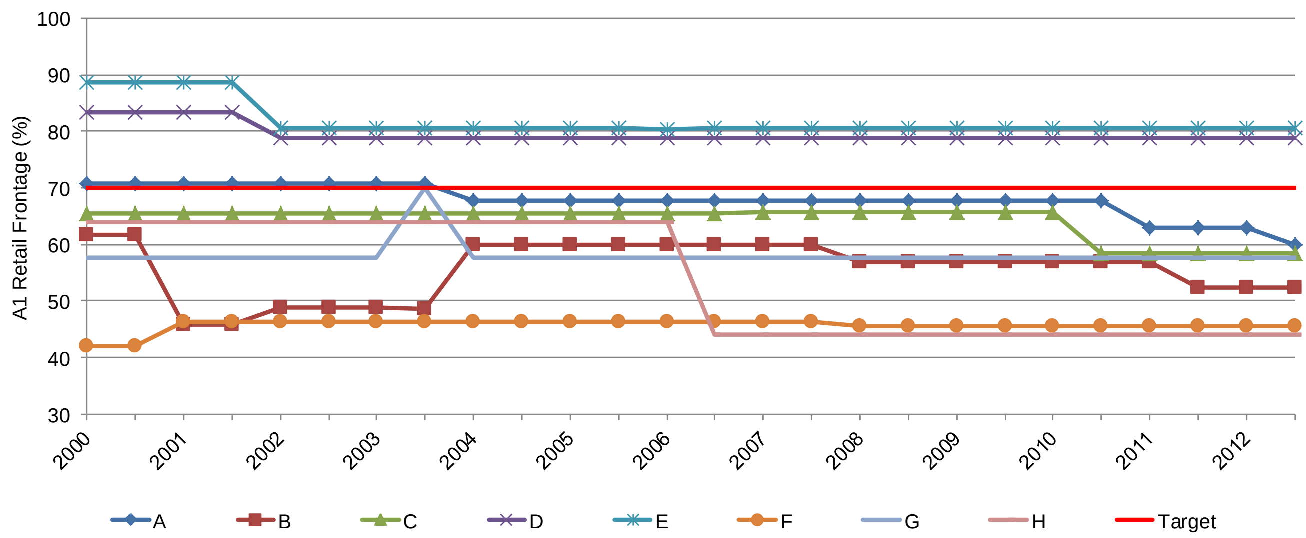
However there has been one change of use in Horley town centre at 86 Victoria Road. This was previously occupied by Optical Boutique (A1) and has since changed to A2 use. The unit is currently occupied by ARK Construction & Landscapes Ltd.

Frontages

Frontages D & E continue to exceed the 70% A1 retail requirement and have done so since 2000.

The main causes for concern are Frontages F & H, current figures stand at 46% and 44% respectively and fall somewhat short of the required target. This has been the case for a number of consecutive years. Frontage H has a particularly high level of A5 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 end of September – 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