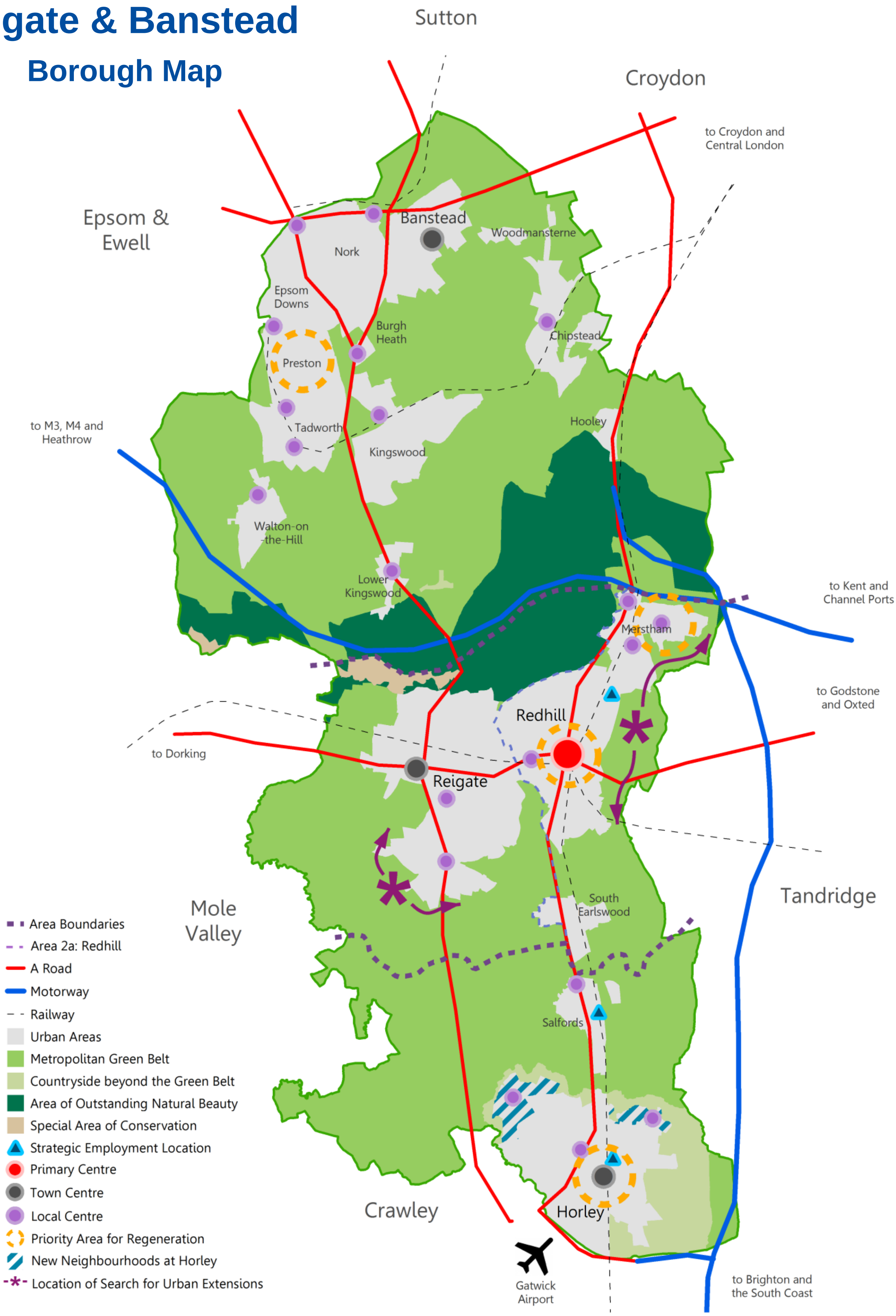
Town Centre Monitor

2016

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

Reigate & Banstead
Borough Map



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2016

Contents

Please Note:
The information contained within this monitor provides a record of the observed current uses and occupiers present within the four main Town centres in Reigate & Banstead. 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 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
- Monitor relevant local policies contained within the Borough Local Plan, namely policies Sh1, Sh7 & Sh8
- Monitor the progress of new developments and regeneration schemes
- 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 adopted its Core Strategy in 2014 and detailed policies relating to the management of development within the town centres will be set out in subsequent Development Management Policies. 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% and 70% respectively.
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

The Core Strategy recognizes the different sizes and retail roles of the town centres:

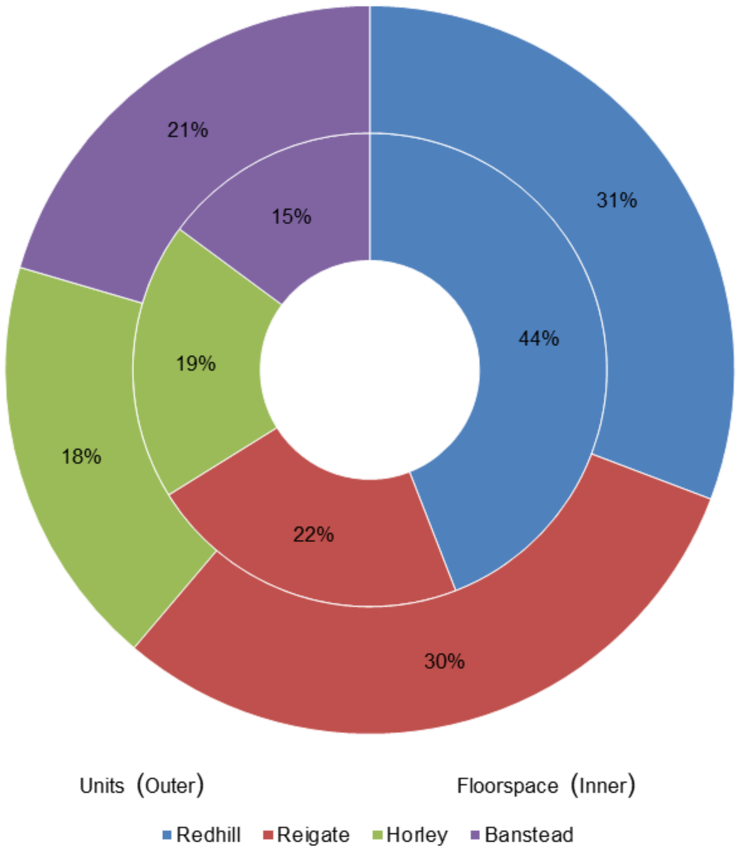
- **Redhill -** is the primary town centre and the focus of future leisure, office and comparison retail growth due to its strong transport links and role as a Regional Hub
- **Reigate -** is the secondary town centre, serving as a convenience destination with a strong range of independent and specialist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

Town Centre Retail Composition

Combined the borough's town centres provide 572 units, 90,105sqm of retail floorspace and 5,338sqm of retail frontage.

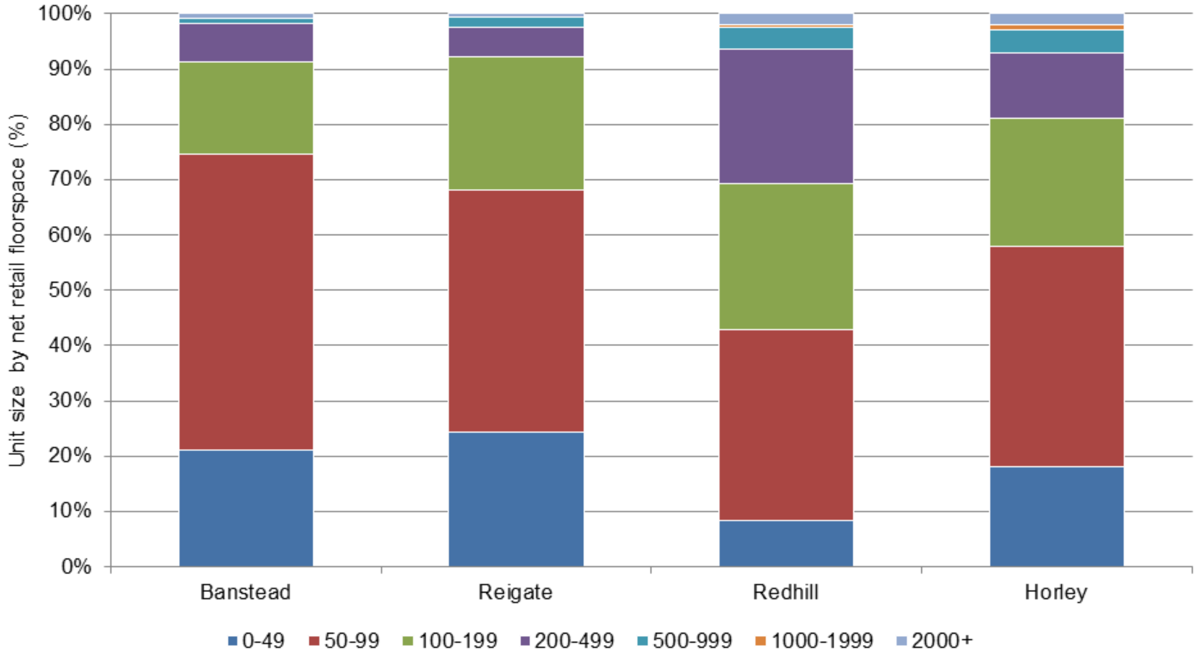
Highlighting its position as the borough's primary town, almost half (44%) of the floorspace is in Redhill. Reigate has 22% followed by Horley (19%). Banstead is the borough's smallest town centre accounting for 14% of the total retail floorspace. Just over 30% of the units are located in Redhill with a similar proportion in Reigate. The remainder are split relatively evenly between the two smaller town centres of Banstead and Horley.

Figure 1 Distribution of Town centre Units & Floorspace



Redhill has the greatest percentage of retail units of 100sqm or larger (57%) whilst Banstead, Reigate and Horley have greater proportions under 100% (75%, 68% and 58%). This reflects the different roles of the town centres.

Figure 2 Breakdown of Town centre Units by Net Retail Floorspace



Overall Trends – Key Messages

National Retail Trends

According to Price Waterhouse Coopers three-quarters of retail sales growth since 2000 has occurred through online channels, which now account for 8% of total retail sales. This growth has breathed new life into the physical stores of some retailers as consumers increasingly “channel blur” as they view/ try goods found online in stores and collect goods purchased online in stores.

Similarly, a joint study by the British Council of Shopping Centres and Local Data Company found greater linkage between online retail and the high street within 2015. The report found that the high street had continued to move away from retail to offer a greater leisure experience (entertainment, food & drink and retail).

Within the last twelve months Britain’s shop vacancy has fallen to 12.6%, the lowest in 6 years. The Local Data Company report that this is due to an increase in the occupation of units (rather than a reduction of stock) and note that high vacancy towns such as Newport, Doncaster, Bradford and Blackburn have all seen improvements. Wales and Greater London saw the largest falls (-1.0% and -0.8%).

The Local Data Company warns that Britain has too many empty shops (47,227). Within the last twelve months there has been a 26% increase in the number of persistently vacant shops (vacant for more than 3 years) to 12,350 – this equates to 4.5% of all the shops within Britain’s town and city centres. The North of England, Scotland and Wales all have persistent vacancy rates above the British average.

Borough Key Messages

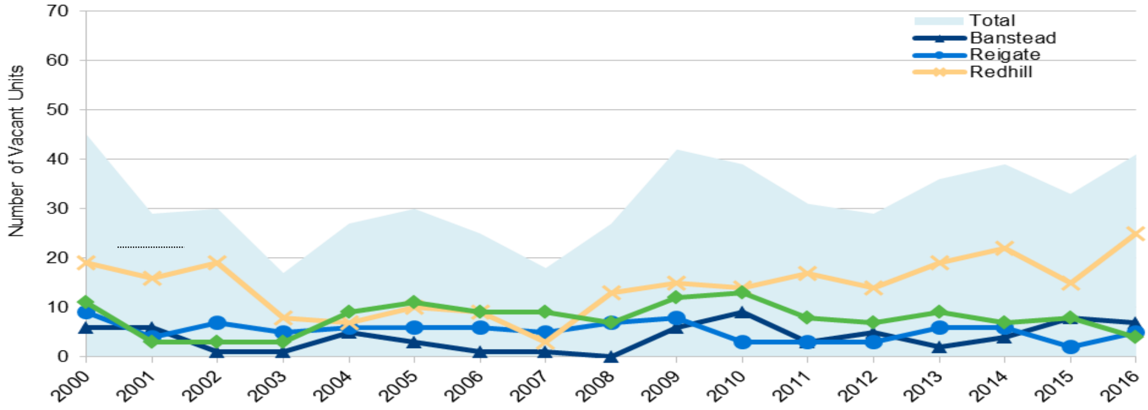
- **Vitality:** A1 remains the dominant use within the borough’s town centres; within the past twelve months there has been a slight fall in the proportion of A1-A5 units (96.2% to 96.0%) and A1 units (67.6% to 67.3%).
- **Retail Uses:** Comparison retail occupies 36% of all units within the borough’s town centres. A third of these units are clothing, footwear & accessories premises and almost half of these are located in Reigate (49%). Services occupy a further 31% of the total units within the borough of which more than a quarter are hair & beauty premises (28%).
- **Retail Composition:** The composition of each of the town centres suggests that they are well matched to fulfil their individual role within the hierarchy as evident in Banstead and Horley, which both have higher proportions of convenience and service based retail, whilst Reigate and Redhill have higher proportions of comparison retail. .
- **Vacancy Rate:** Vacancy rate has increased (5.4% to 7.2%) due to an increase in the number of vacant units (33 to 41). However, it remains below the national average of 14%. Banstead and Horley have seen falls (6.9% to 6.0% and 7.7% to 3.8%) whilst Reigate and Redhill have seen increases (1.2% to 2.9% and 8.8% to 14.2%).
- **New Occupiers:** 24 new occupiers have moved into the four town centres within the past year: Horley saw the greatest increase (9) and Reigate the least (4).
- **Planning Permissions:** There are currently 36 planning permissions which have the potential to deliver an additional 16,515sqm of floorspace. If delivered Redhill would see the greatest additional floorspace (67%, 11,131sqm). Of these planning permissions 18 are under construction (11,604sqm) and a further 18 are not started (4,911sqm).

Vacancies & New Occupiers

Vacancy Trend

Within the monitoring period the number of vacant units has increased (33 to 41): Reigate and Redhill have seen increases (3 and 10) whilst Banstead and Horley have seen falls (1 and 4).

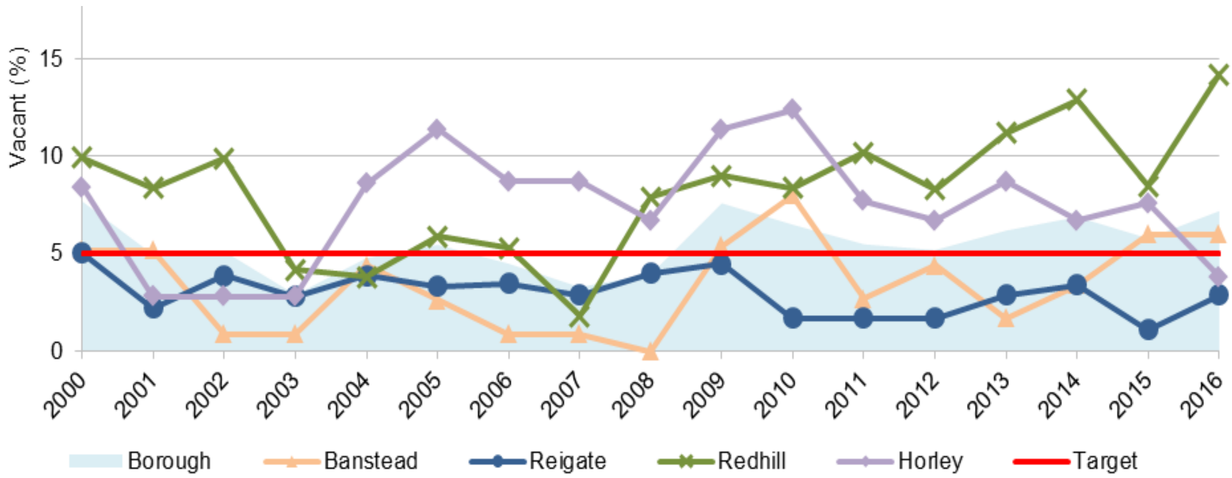
Figure 3 Number of Vacant Units (2000-2016)



The borough's vacancy rate has rose from 5.8% to 7.2%: Banstead and Horley have seen falls and Reigate and Redhill increases.

The borough has a vacancy target of 5%: for the first time since 2004 Horley has a vacancy rate below this (3.8%), Reigate's remains below (2.9%), Banstead is slightly above (6.0%) and Redhill is significantly above (14.2%). All town centres, apart from Redhill, have a vacancy rate below the national vacancy rate (14%).

Figure 4 Percentage Vacancy Rate (2000-2016)



Vacant frontage is also an important consideration as vacant units with large frontages (such as the former Knights unit in Reigate) will have a disproportionate visual impact. Within the last twelve months vacant frontage rose (4.6% to 7.2%). Vacant floorspace also rose (3.1% to 5.0%).

Table 1 Summary of Current Vacancy Position

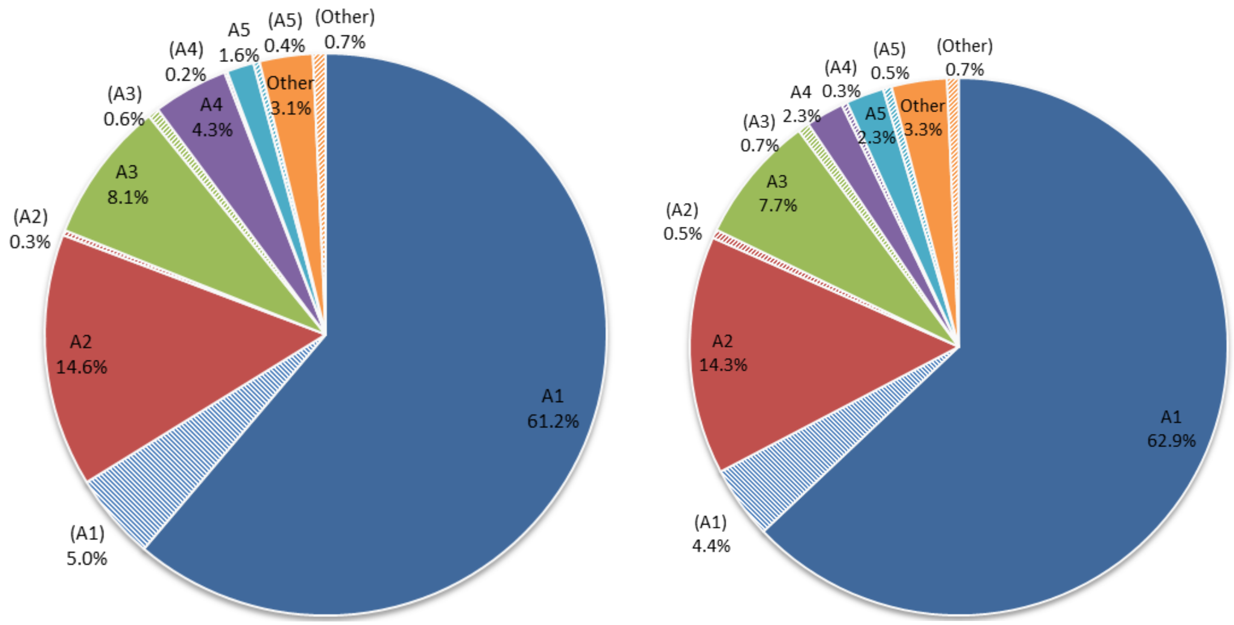
	Vacant	Vacancy Rate
Units/Premises (No.)	41	7.2%
Frontage (Metres)	387	7.2%
Floorspace (Sqm)	4,518	5.0%

Use Classes

In order to protect and enhance the vitality of the borough's town centres and ensure that they continue to meet resident and visitor demand it is important that an appropriate mix of uses is maintained. A key objective of policies Sh1, Sh7 and Sh8 is the promotion of A1 and the resistance of excessive change away from core retail uses.

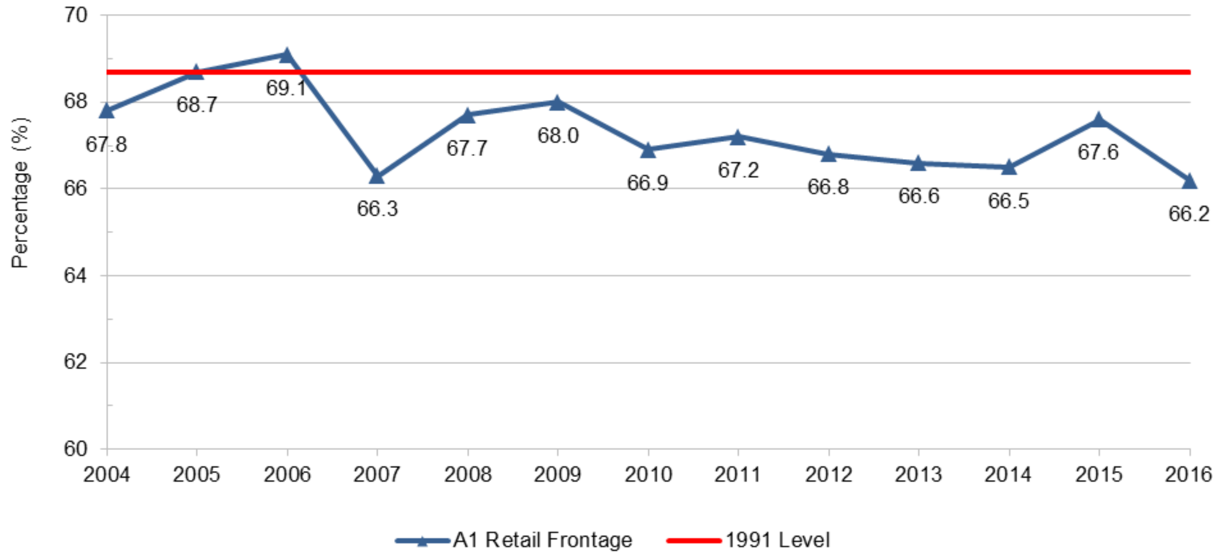
The majority of units across the town centres fall within A1 to A5 use (96.2%) and specifically 67.3% are A1 (this compares to 96.2% and 67.6% previously).

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



On the whole policies aimed at protecting against excessive loss of A1 units have been successful. In 1991, A1 represented almost 69% of total frontage across the four town centres and although there has been slight movement over the years, overall the proportion remains the same. It currently stands at 66.2%.

Figure 6 A1 Retail in Town Centre Units (2004 – 2016)



Retail Offer

It is useful to analyze the 'offer' which is provided across the town centres as this provides a better indication of the types of shops and services which are available.

Within the last twelve months there has been very little change to the overall proportion of retail offer: services have seen a 2% increase (to 31%), comparison has seen a 1% fall (to 36%) and non-A class a 1% fall (to 2%).

Convenience retail continues to account for the lowest percentage of retail units (9%) but makes up just over a quarter of the floorspace (27%), this is largely due to the dominance of larger format supermarkets such as Waitrose in Horley and Morrisons in Reigate.

Services continue to make up the second highest percentage of units (31%) however they only take up 16% of the retail floorspace, suggesting that they tend to occupy smaller units.

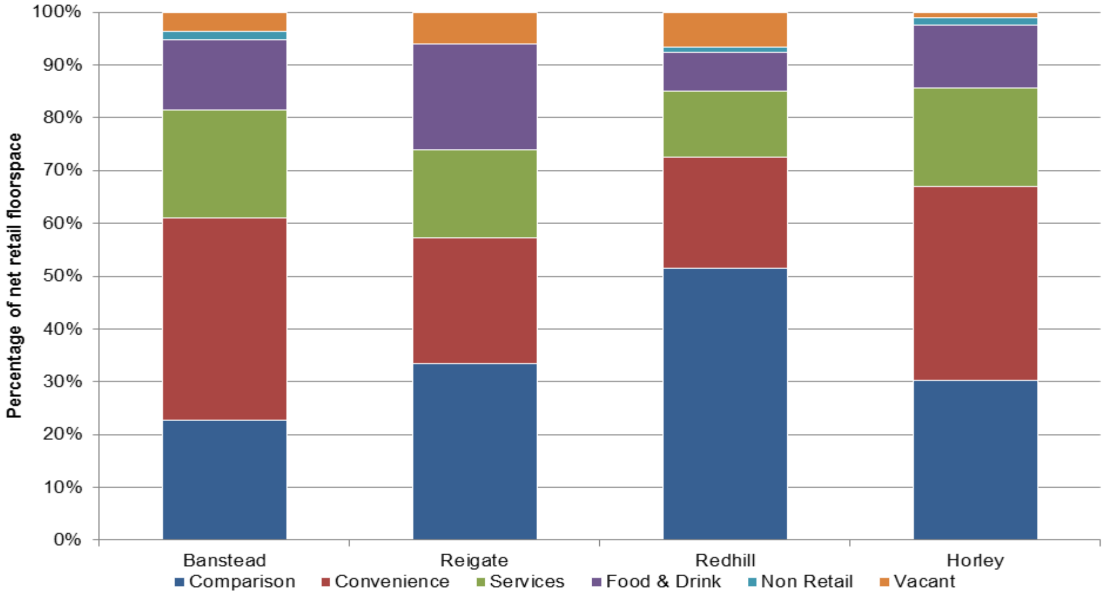
Table 2 Breakdown of Retail Offer

	Units	Floorspace(sqm)
Comparison	206 (36.0%)	35,365 (39.2%)
Convenience	51 (8.9%)	24,493 (27.2%)
Service	177 (30.9%)	14,170 (15.7%)
Food & Drink Leisure	84 (14.7%)	10,741 (11.9%)
Non-Retail	13 (2.3%)	818 (0.9%)
Vacant	41 (7.2%)	4,519 (5.0%)
Total	**572**	**90,105**

Figure 7 details the composition of retail floorspace across the town centres: it shows that comparison, convenience, services and food & drink leisure are the main occupiers of all the town centres whilst non-retail and vacant premises occupy smaller percentages.

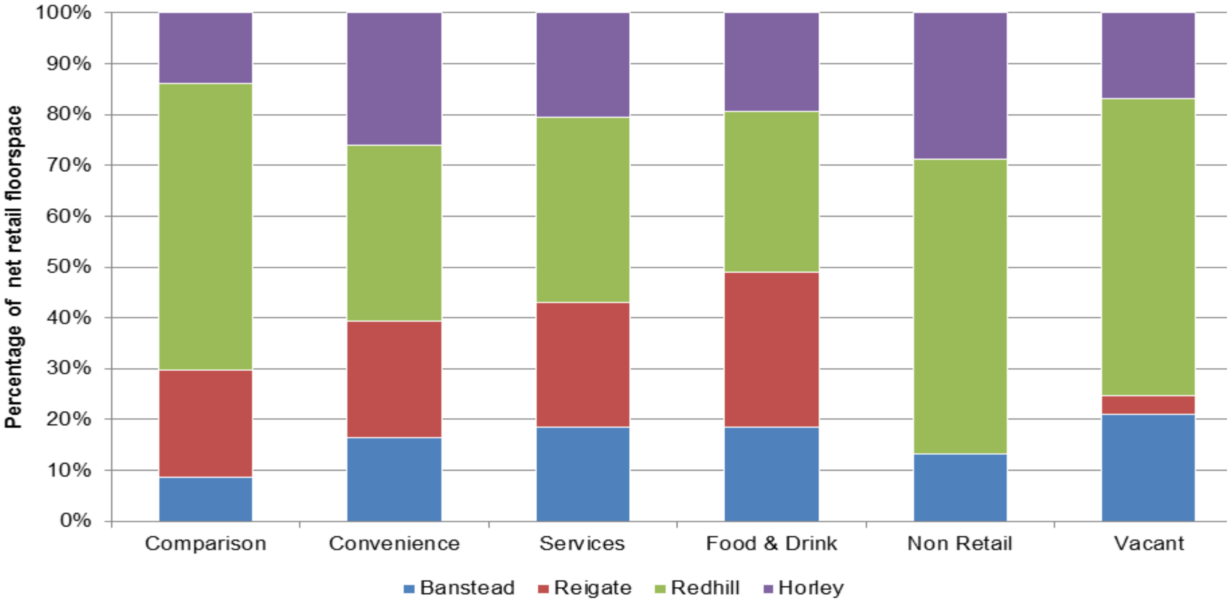
Specifically reflecting the different roles of the town centres, the diagram shows that the majority of the floorspace in Redhill is comparison (51.6%), smaller amounts of comparison in Reigate (33.4%) whilst convenience occupies the greatest percentages in Banstead and Horley (22.7% and 30.3%).

Figure 7 Retail Offer by Centre



The diagram below details the retail offer within the town centres, it shows that Redhill has the greatest percentage of net retail floorspace for all the retail categories apart from food & drink leisure for which Reigate has the greatest proportion (20.2%).

Figure 8 Retail Offer by Retail Category



Main Retail Categories

Despite changes within the individual town centres within the monitoring period, there has been very little overall change to the proportion of each type of retail. Convenience and food & drink leisure have seen no changes (9% and 15%); services have seen a 2% increase and comparison and non-A class have both seen 1% falls.

Comparison retail continues to occupy the greatest proportion of the units (36%) followed by services (31%). Food & drink leisure occupies a further 15%.

Almost two-thirds (65%) of comparison retail is clothing, footwear & accessories (33%), home & diy (16%) and charity/ second-hand (16%). Noteworthy, almost half (49%) of the clothing, footwear & accessories providers are located in Reigate.

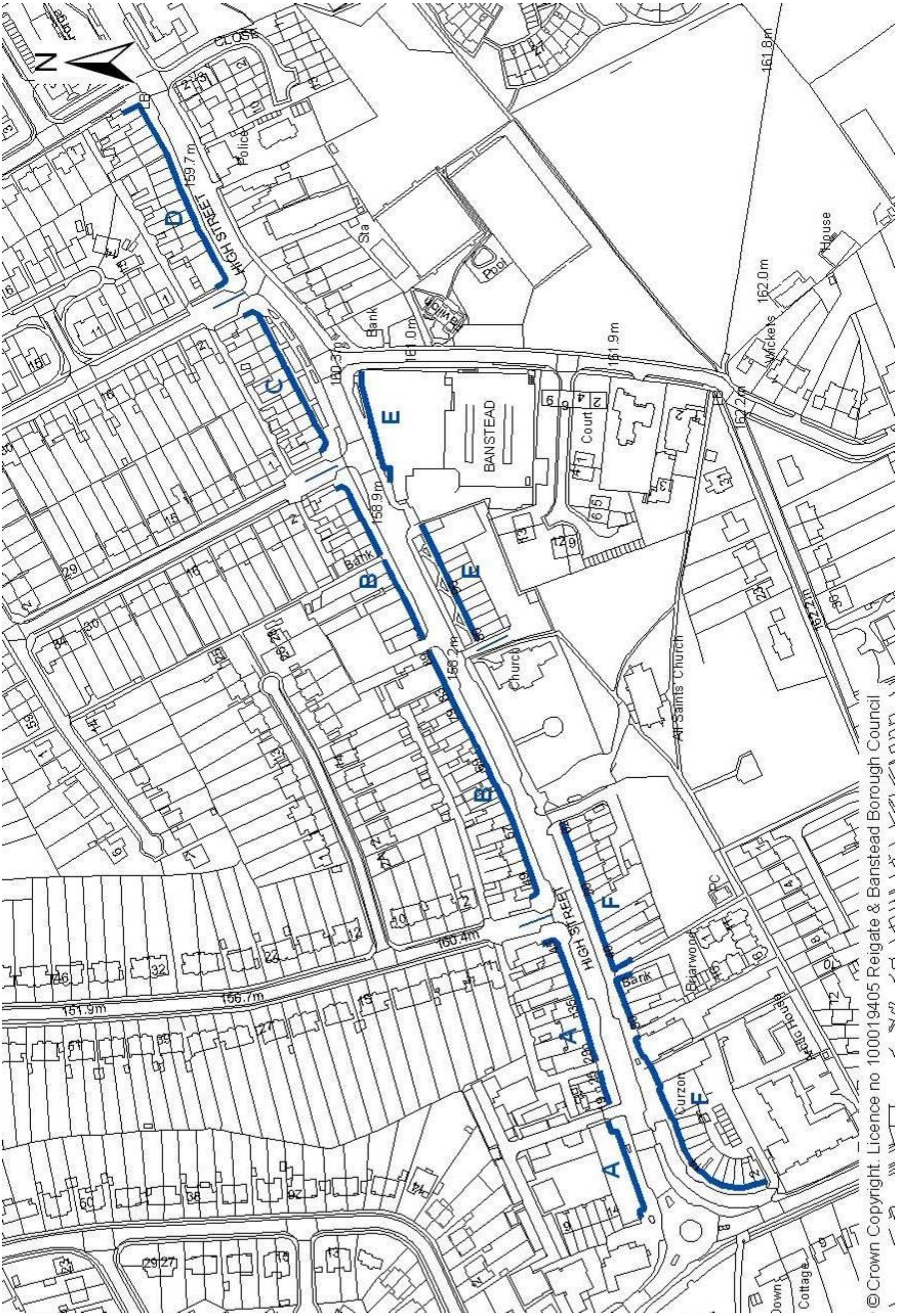
Together hair & beauty providers and estate agents occupy almost half of the service units within the borough (47% - 28% and 19%). Whilst the number of hair & beauty providers is relatively evenly spread across the borough's four town centres, the number of estate agents varies. Reigate has the greatest number of estate Agents (13) whilst Banstead the least (2).

Over two-thirds of the Food & Drink Leisure establishments within the borough are restaurants (39%) or café/ sandwich bars (29%). Reigate has the greatest number of both (14 and 8); Redhill has the fewest restaurants (5) and Horley the fewest café/ sandwich bars (3). Conversely, half of the take-aways are in Horley (7).

Table 3 Detailed Breakdown of Retail Categories (Units)

Comparison	Banstead	Reigate	Redhill	Horley	TOTAL
Clothing, Footwear & Accessories	11	33	18	6	68
Bookshops & Stationers	1	4	5	1	11
Home & DIY	10	14	3	5	32
Electronics & Technology	2	3	6	1	12
Charity/Second-Hand	8	7	8	9	32
Toys, Games & Sports	0	3	2	0	5
Other Comparison Retail (e.g. Gifts, Florists)	6	13	22	5	46
Total Comparison	**38 (32.5%)**	**77 (44.3%)**	**64 (36.4%)**	**27 (25.8%)**	**206 (36.0%)**
Convenience					
Food/Supermarket	8	7	6	7	28
Newsagents	1	2	4	3	10
Chemist/Pharmacy	4	2	4	3	13
Total Convenience	**13 (11.1%)**	**11 (6.3%)**	**14 (8.0%)**	**13 (12.4%)**	**51 (8.9%)**
Service					
Travel Agents	2	1	3	0	6
Hair & Beauty	13	13	14	10	50
Opticians	6	5	5	1	17
Banking	5	7	9	6	27
Estate Agents	2	13	8	11	34
Bookmakers	7	1	5	2	15
Dry Cleaning	2	3	2	3	10
Other Services (e.g. Employment, Repairs)	5	5	4	4	18
Total Service	**42 (35.9%)**	**48 (27.6%)**	**50 (28.4%)**	**37 (35.2%)**	**177 (30.9%)**
Food & Drink Establishments					
Restaurant	8	14	5	6	33
Take-away	3	3	1	7	14
Café/Sandwich Bar	5	8	7	4	24
Pub/Club	0	6	4	3	13
Total Food & Drink Establishments	**16 (13.7%)**	**31 (17.8%)**	**17 (9.7%)**	**20 (19.0%)**	**84 (14.7%)**
Non A Class	1 (0.9%)	2 (1.1%)	6 (3.4%)	4 (3.8%)	13 (2.3%)
Vacant	7 (6.0%)	5 (2.9%)	25 (14.2%)	4 (3.8%)	41 (7.2%)
TOTAL	**117**	**174**	**176**	**105**	**572**

Banstead Village



Commentary

Banstead Village is an attractive district centre which lies close to the northern boundary of the borough. It consists primarily of a unified parade of small 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 other towards the middle.

Vacancies & New Occupiers

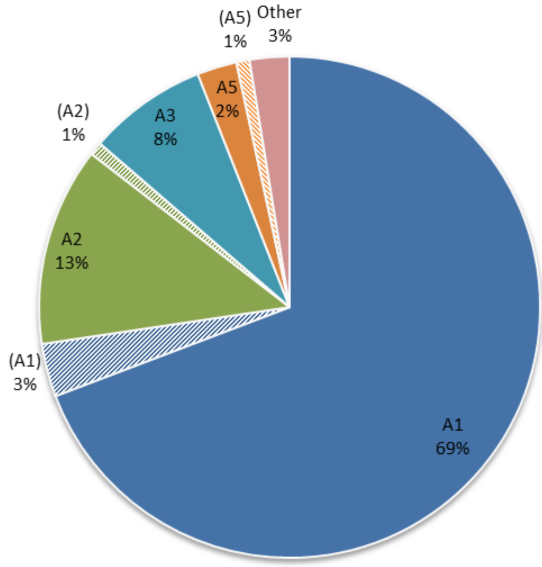
There have been a number of occupier changes: 6 new occupiers have moved into the town centre and 5 have left. This has led to a slight reduction in the number of vacant premises (8 to 7) and correspondingly a fall in the percentage of vacant units (6.9% to 6.0%) and vacant floorspace (5.0% to 3.7%). There has however been a slight increase in vacant frontage (4.3% to 4.4%).

	Vacancy Rate
% of units	6.0%
% of frontage	3.7%
% of net retail floorspace	4.4%

Vitality

Primary retail uses (A1-A5) dominate Banstead's retail frontage, accounting for 97% of the total frontage. Specifically A1 retail makes up 72% of the retail frontage which is slightly below the 75% threshold requirement set out in the Borough Local Plan.

Figure 8 Breakdown of Use Classes (Frontage)



Services occupy the greatest number of units (36%), followed by comparison (33%) and convenience (11%). Convenience occupies more than a third of retail floorspace, followed by comparison (23%) and services (21%). Comparison retail occupies a higher proportion of floorspace than units due to two large food stores (Waitrose 3,114sqm and Marks & Spencer's 580sqm).

Table 4 Retail Offer

	Units	Net Floorspace (sqm)
Comparison	38 (32.5%)	3,034 (22.7%)
Convenience	13 (11.1%)	5,121 (38.3%)
Service	42 (35.9%)	2,741 (20.5%)
Food & Drink Leisure	16 (13.7%)	1,779 (13.3%)
Non-Retail	1 (0.9%)	210 (1.6%)
Vacant	7 (6.0%)	496 (3.7%)
Total	**117**	**13,381**

Development & Use Class Changes

Within the monitoring period one planning application (13/01440/F) has been completed. This is for a 35sqm A3 extension at 167 High Street.

Three planning permissions are under construction; these have the potential to deliver 351sqm of commercial floorspace:

- 12/02085/F – 46 High Street: Change of use of 1st and 2nd floors to residential and rear extension increasing B8 floorspace by 150sqm
- 15/005789/F – 89 High Street: Construction of new 3 storey building, accommodating A3 unit (134sqm) and residential accommodation
- 14/01427/F – 109 High Street: Extension to increase A1 by 67sqm

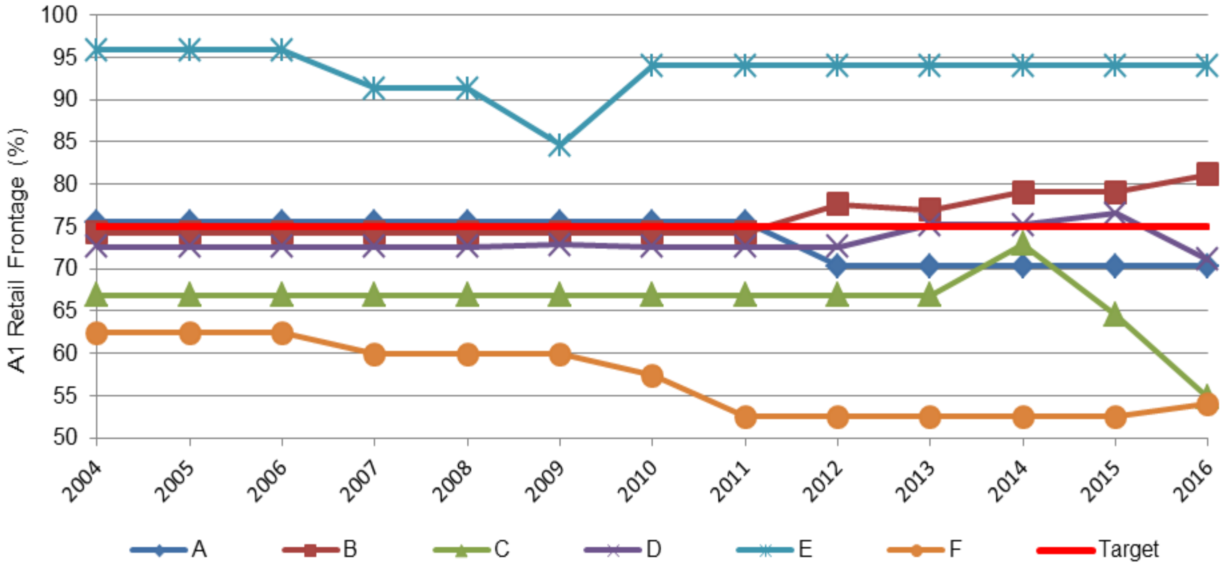
There are a number of outstanding planning permissions; if delivered they will increase commercial floorspace by 150sqm:

- 12/02085/F – 150 High Street: Extension to provide an additional 91sqm B1(A) and 1,220sqm D1
- 13/02290/CU – 73 High Street: Extension to increase A1 by 10sqm
- 14/02053/F – 125 High Street: Rear extension to increase A1 by 43sqm
- 14/02286/F – 59 High Street: Demolition of existing kitchen and external buildings and replacement with a retail extension increasing A1 by 56sqm
- 14/00843/P3JPA – 10a High Street: Office to residential permitted development reducing B1(A) by 65sqm
- 15/00625/F – 139 High Street: Extension to increase A1 by 15sqm

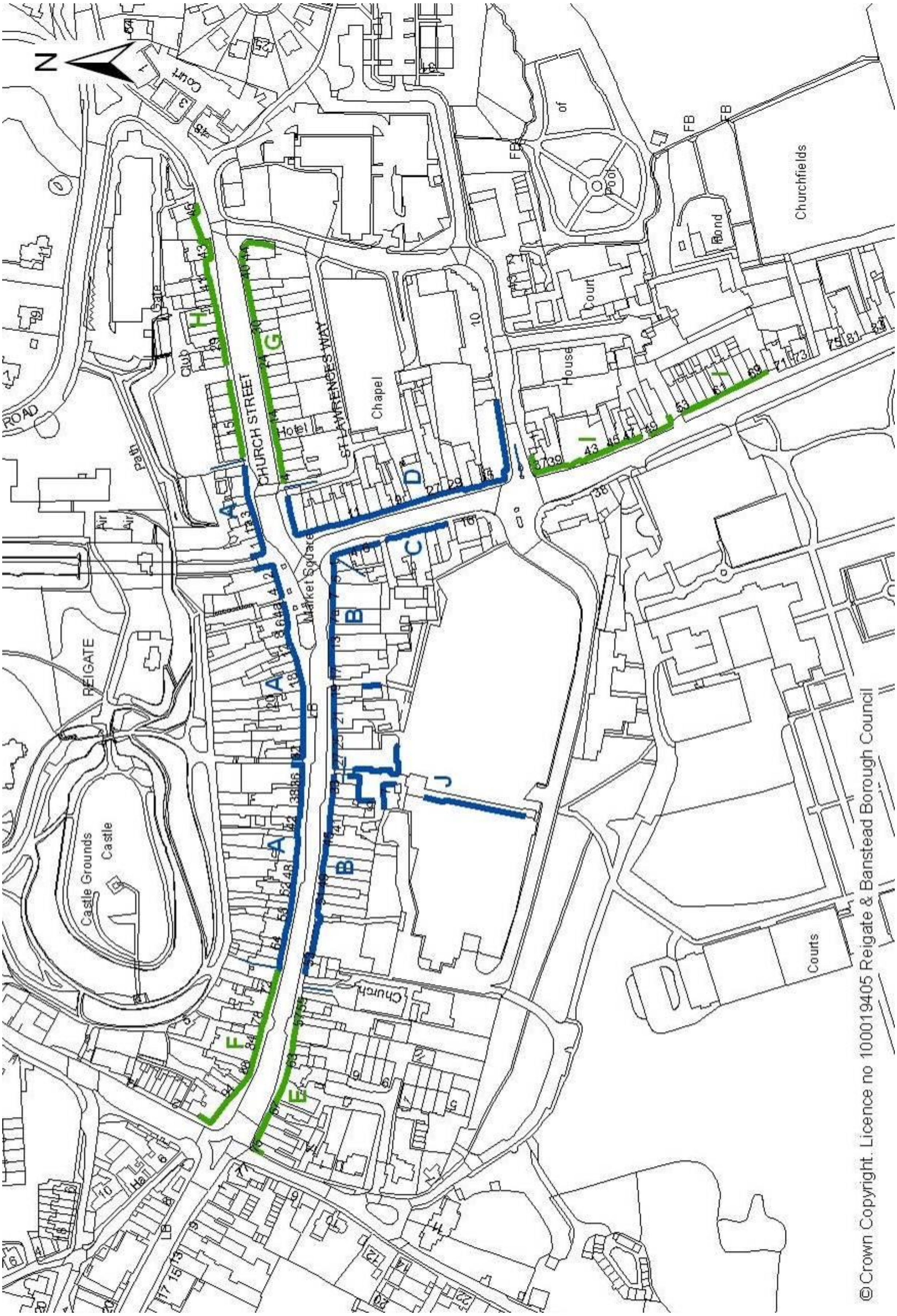
Frontages

Banstead continues to have a strong A1 retail frontage. Frontages B and E continue to exceed the 75% threshold requirement, specifically frontage E which continues to have 94% A1 retail within its frontage, this is predominantly made up of Waitrose which has helped to maintain a strong frontage. Once again frontage F falls considerably below the A1 requirement (54%) due to having a number of large fronted A2 and A3 units.

Figure 9 Banstead Frontage A1 Retail Trend (2004 - 2016)



Reigate Town Centre



Commentary

Reigate town centre is an historic market town, most of which falls within a conservation area. It has a vibrant mix of independent boutique clothing units, complemented by a good selection of cafés and restaurants which contribute to the character and highly valued townscape of the centre. The three main shopping streets are oriented around the attractive focal point of the Old Town Hall. The town centre benefits from two food stores, the smaller Marks & Spencer's along the High Street and the large Morrisons supermarket which lies behind the main street in Cage Yard.

Vacancies & New Occupiers

Within the last twelve months there has been an increase in the number of vacant units (2 to 5), vacant frontage (0.6% to 6.7%) and vacant floorspace (0.5% to 5.9%). Vacant frontage and floorspace has increased significantly due to the large Knights department store (20.5sqm frontage and 536dqm retail floorspace) and Edward Dean kitchen store (52.9sqm frontage and 364sqm retail floorspace) becoming vacant.

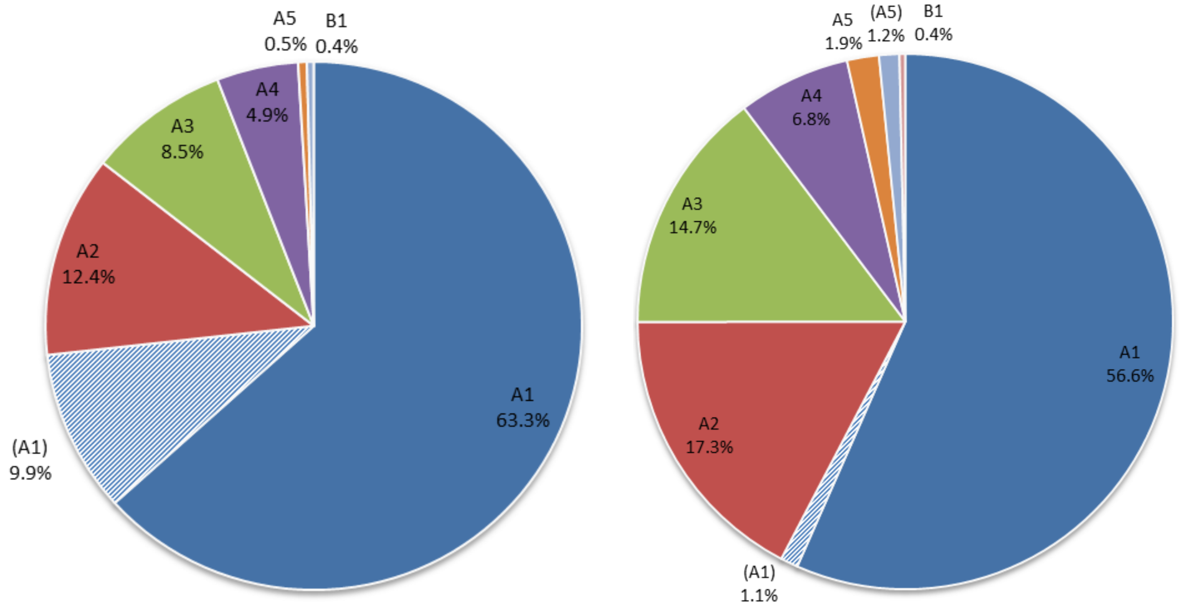
Four new occupiers have moved into the town centre within this monitoring period and seven have left. Three of the vacant units are undergoing refurbishments or subject to live planning applications and – subject to approval – may be occupied shortly.

	Vacancy Rate
% of units	2.9%
% of frontage	6.7%
% of net retail floorspace	5.9%

Vitality

Reigate continues to have the highest proportion of frontage falling within A1 to A5 use classes (99%). Significantly, the proportion is consistent across both the primary and secondary frontages. However, both the primary and secondary frontages fall below the A1 threshold set out in the local plan, the primary frontage having 73% (against 80% target) and the secondary frontage having 58% (against 66% target).

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



Reigate has the highest proportion of food & drink leisure units and floorspace within the borough (18% and 20%). The majority fall within the town's secondary retail frontage and many are of high quality, adding to the vitality and active evening environment.

The centre continues to have the highest percentage of comparison units (44%) and the second highest proportion of comparison retail floorspace (33%) after Redhill. This is largely due to the high number of boutique shops selling specifically homewares, gifts, clothing, footwear and accessories which when combined account for 35% of the total retail premises. Reigate also has a high proportion of service based premises (28%) including estate agents, hair and beauty salons.

Table 5 Retail Offer

	Units	Net Floorspace (sqm)
Comparison	77 (44.3%)	6,634 (33.4%)
Convenience	11 (6.3%)	4,735 (23.8%)
Service	48 (27.6%)	3,305 (16.6%)
Food & Drink Leisure	31 (17.8%)	4,005 (20.2%)
Non-Retail	2 (1.1%)	0 (0.0%)
Vacant	5 92.9%)	1,180 (5.9%)
Total	**174**	**19,859**

Development & Use Class Changes

Within the last twelve months there has been no development completed within Reigate town centre.

One planning permission (15/01186/PAP3O) for an office to residential permitted development at Liberty House is under construction (leading to a loss of 852sqm B1(A)).

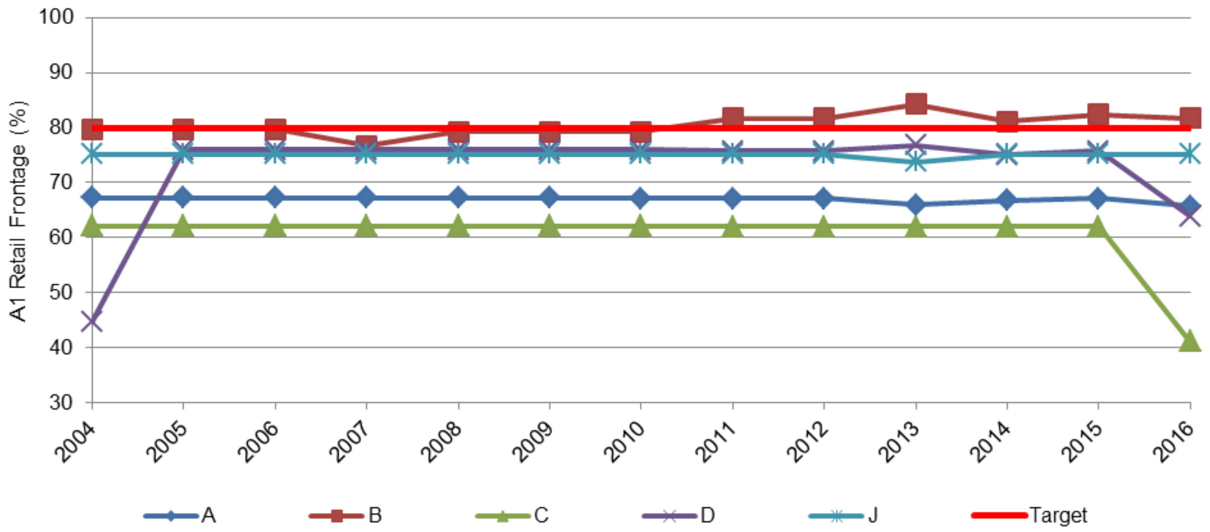
There is also an outstanding permission (14/00407/F) for an extension to the retail units at 4-10 Church Street (180sqm) and conversion of upper floors to residential.

Frontages

Primary

Frontage B (82%) continues to be the only primary frontage to exceed the 80% threshold for A1 retail, although J is near (75%). Within the last twelve months frontage C has fallen considerably from 62% to 41% due to a large unit (Knights – 21m frontage) closing.

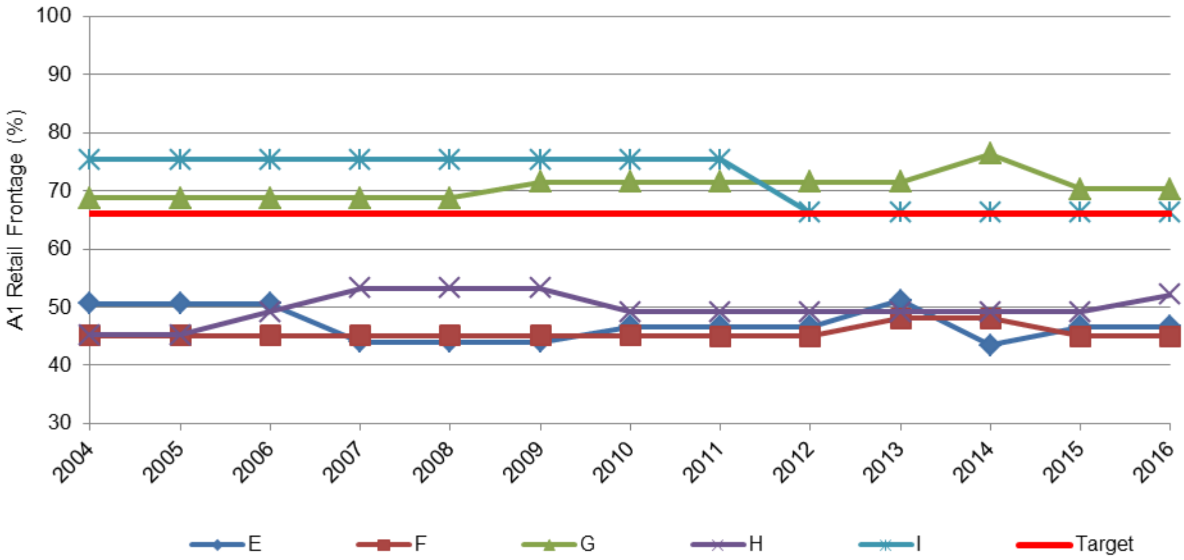
Figure 11 Reigate Primary Frontage A1 Retail Trend



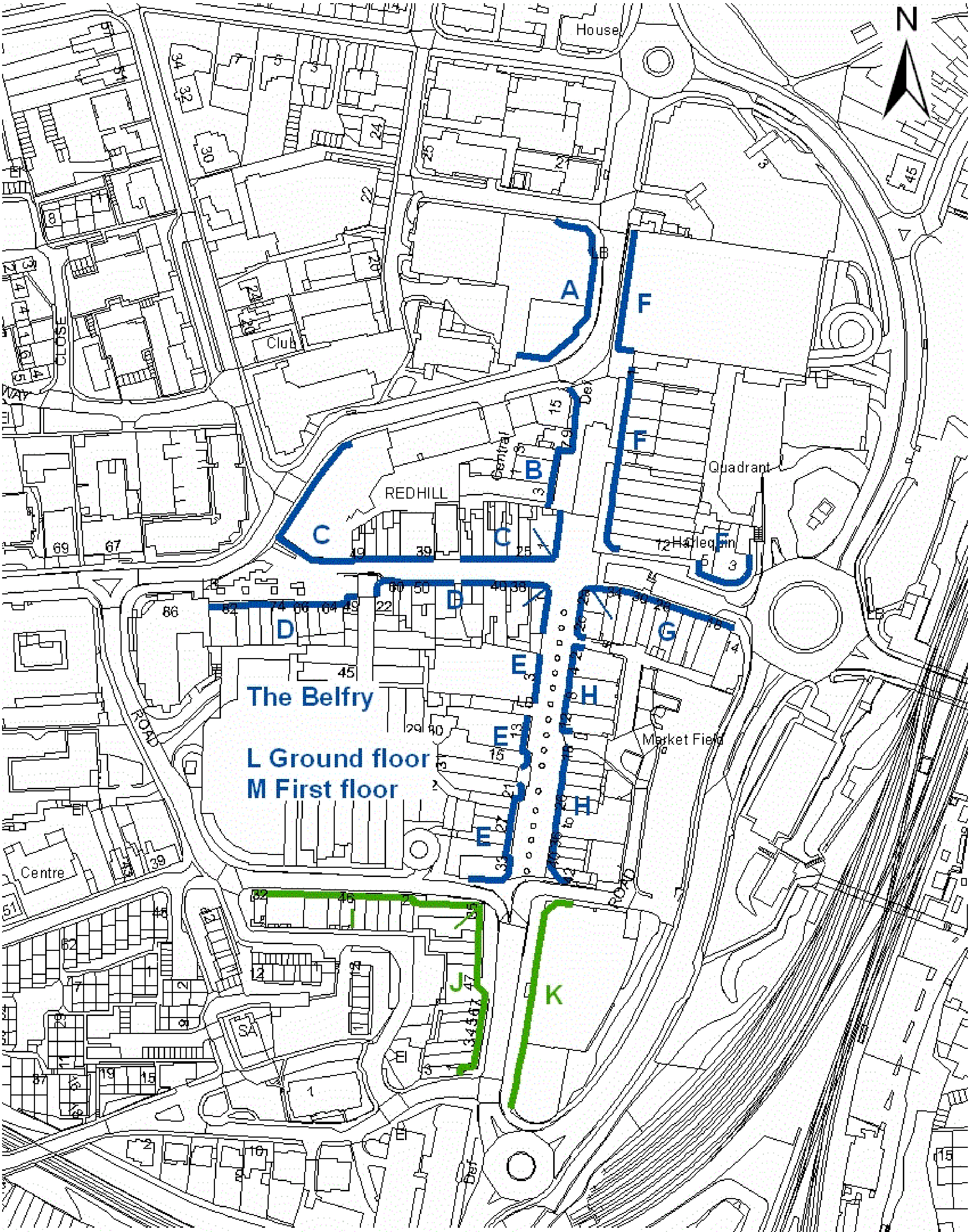
Secondary

There has been little change to the proportion of A1 frontage within the secondary frontage: frontages G and I continue to be only frontages exceeding the 66% threshold (70% and 66%) whilst frontages E, F and H continue to fall below (47%, 45% and 52%). Frontage H has seen a slight increase in the proportion of A1 frontage (49% to 52%) due to the Reigate Chippy vacating their premise.

Figure 12 Reigate Secondary Frontage A1 Retail Trend



Redhill Town Centre



Commentary

The Core Strategy recognises that Redhill is the primary town centre of the borough and the focus of future leisure, office and comparison retail due to its strong transport links and role as a regional hub.

Redhill has the largest retail frontage of the borough's four town centres, offers the greatest number of retail units and retail floorspace. 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 this. It is home to the Belfry Shopping Centre.

Major works have been planned to improve the public realm and townscape: within the last twelve months work has started on the second phase of work to create a new Sainsbury's supermarket, Travelodge hotel and gym. Further works planned include the construction of a Tesco Express and residential accommodation on the Former Liquid & Envy site; the redevelopment of Redhill Railway Station to comprise a new Waitrose supermarket, several smaller units and residential accommodation; and the redevelopment of Marketfield Way to include a Cinema, restaurants, retail and residential accommodation.

Vacancies & New Occupiers

There have been a number of occupier changes within the last twelve months, 5 occupiers have moved into Redhill town centre, 15 have left and 2 have relocated to larger units (Mr Simms Olde Sweet Shop and Toy Barnhaus) and 1 (Vodaphone) has downsized from 2 units in the Belfry to 1 newly refurbished unit.

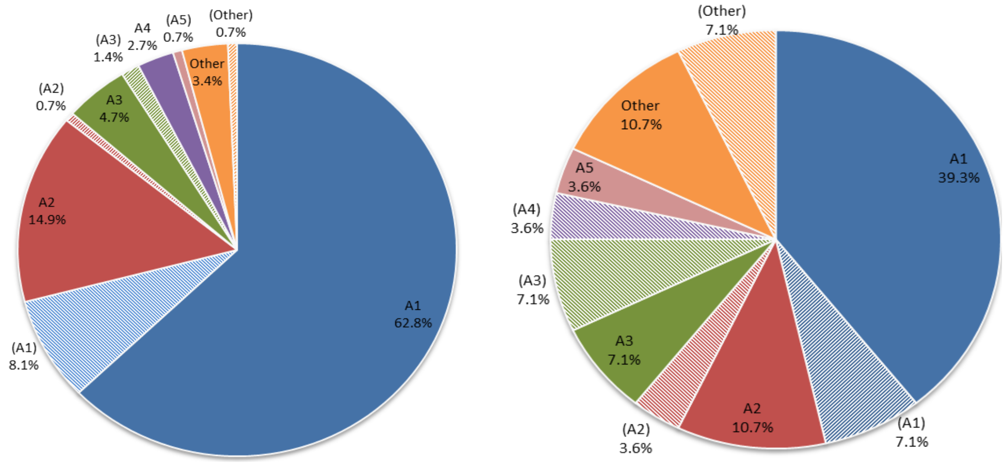
Redhill continues to have the greatest number of vacant premises. Within the monitoring period the number of vacant units has increased (15 to 25), vacant floorspace increased (4.3% to 6.7%) and vacant frontage increased (6.3% to 11.5%)

	Vacancy Rate
% of units	14.2%
% of frontage	11.5%
% of net retail floorspace	6.7%

Vitality

A1 to A5 uses constitute around 95% of the primary frontage and 82% of the secondary frontage. Redhill's primary and secondary frontages both miss the A1 requirement, with primary frontage having 71% (against 80% target) and secondary frontage having 46% (against 66% target). The town's secondary frontage is predominantly made up of office frontage and includes Kingsgate which was previously retail frontage. As part of the Development Management Plan retail frontages will be reviewed.

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



As would be expected for a primary centre and sub-regional destination, comparison retail remains the dominant retail offer. Over half of the floorspace within the town centre is comparison retail; this is the greatest of all the town centres. In particular, Redhill has the largest representation of multiple retailers of which the majority are within the Belfry Shopping Centre.

On the other hand the proportion of food & drink leisure floorspace is considerably lower than the borough's other three centres. This makes up around 7% of the total, in comparison Reigate has almost three times as much (20%).

In order for Redhill to become a more competitive and successful shopping and leisure destination and fulfil its role as the borough's primary town centre, it has been recognised that the quality of offer in Redhill needs to be improved. It is hoped that the current regeneration programmes will help to deliver this.

Table 6 Retail Offer

	Units	Net Floorspace (sqm)
Comparison	64 (36.4%)	20,506 (51.6%)
Convenience	14 (8.0%)	8,351 (21.0%)
Service	17 (9.7%)	2,904 (7.3%)
Food & Drink Leisure	6 (3.4%)	383 (1.0%)
Non-Retail	50 (28.4%)	4,931 (12.4%)
Vacant	25 (14.2%)	2,664 (6.7%)
Total	**176**	**39,740**

Developments & Use Class Changes

As part of the regeneration of the town, planning permission (15/012353/CU) has been completed to create an information centre (change of use A1 to B1(A)) at 26 London Road. In addition, works have commenced on two further major applications, these have the potential to deliver 5,150sqm of commercial floorspace:

- 12/01852/F – Sainsbury's 32 London Road: Mixed use redevelopment to enlarge supermarket (4,795sqm), Travelodge hotel and gym
- 14/00846/F – Former Liquid & Envy Nightclub: Mixed use redevelopment to provide retail (355sqm) and residential

A further application (13/00848/F) for the mixed use redevelopment of Redhill Railway Station (4,788sqm retail and residential) has not yet been started.

A number of other permissions are under construction; these have the potential to deliver 2,325sqm of commercial floorspace:

- 12/01851/F – 43 Station Road: Extension to increase B1(A) by 8sqm
- 13/009781/P3JPA – 48 Station Road: Office to residential permitted development (302sqm)
- 14/01331/OUT – Knowles House, 35-48 High Street: Change of use of existing offices to residential accommodation (2,404sqm) and extension to provide a further 2 storeys of residential accommodation
- 14/00837/F – Former Crown Buildings, 73-75 London Road: Erection of new office block (5,430sqm)
- 14/02551/P3JPA – Rawlinson House, 7-9 London Road: Office to residential permitted development (407sqm)

There are also a number of other permissions which have not yet been started; if delivered, these have the potential to reduce commercial floorspace by 1,132sqm:

- 14/00763/CU – 26-28 Station Road: Change of use office to residential (428sqm) and residential extension
- 14/02497/CU – 54 Station Road: Change of use SG to A2
- 15/02055/CU – Gatton Place, St Matthews Road: Partial change of use B1 to D1

- 13/00094/CLP – 39-41 Station Road: Partial change of use from A2 to residential (340sqm)
- 15/01862/PAP3O – 22 Station Road: Permitted development office to residential (194sqm)
- 15/02354/PAP3O – Grovehill House, Grovehill Road: Permitted development office to residential (170sqm)

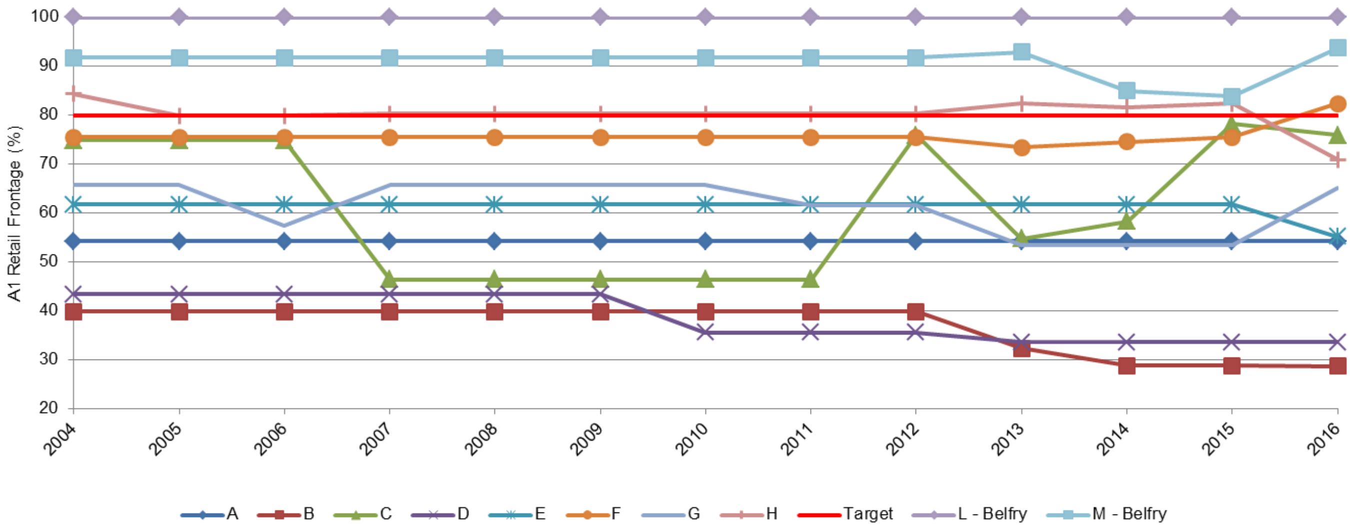
Frontages

Primary

There is considerable variation in the proportion of A1 retail falling within Redhill's primary retail frontages: frontages L and M located in the Belfry have the greatest proportion of A1 retail (100% and 94%) whilst frontage B has the lowest representation (29%).

As has been the case for the last seven years, frontages H, L and M all exceed the 80% primary A1 retail threshold whilst frontages C and F continue to fall just below (76% and 71%). The remaining primary frontages continue to fall considerably below the 80% primary A1 retail threshold; in particular frontages B and D are of particular concern as they both consist of less than 50%. Frontage B has a high proportion of A2 financial and professional services, whilst frontage D has an extremely diverse mix comprising A1-A4 and SG uses.

Figure 14 Redhill Primary Frontage A1 Retail Trend

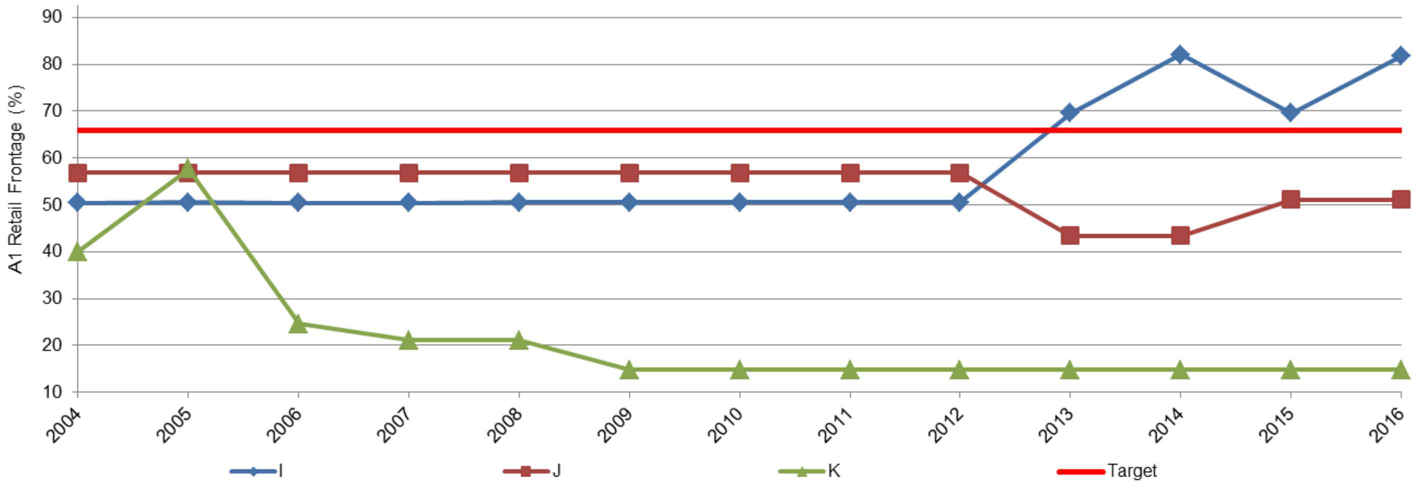


Secondary

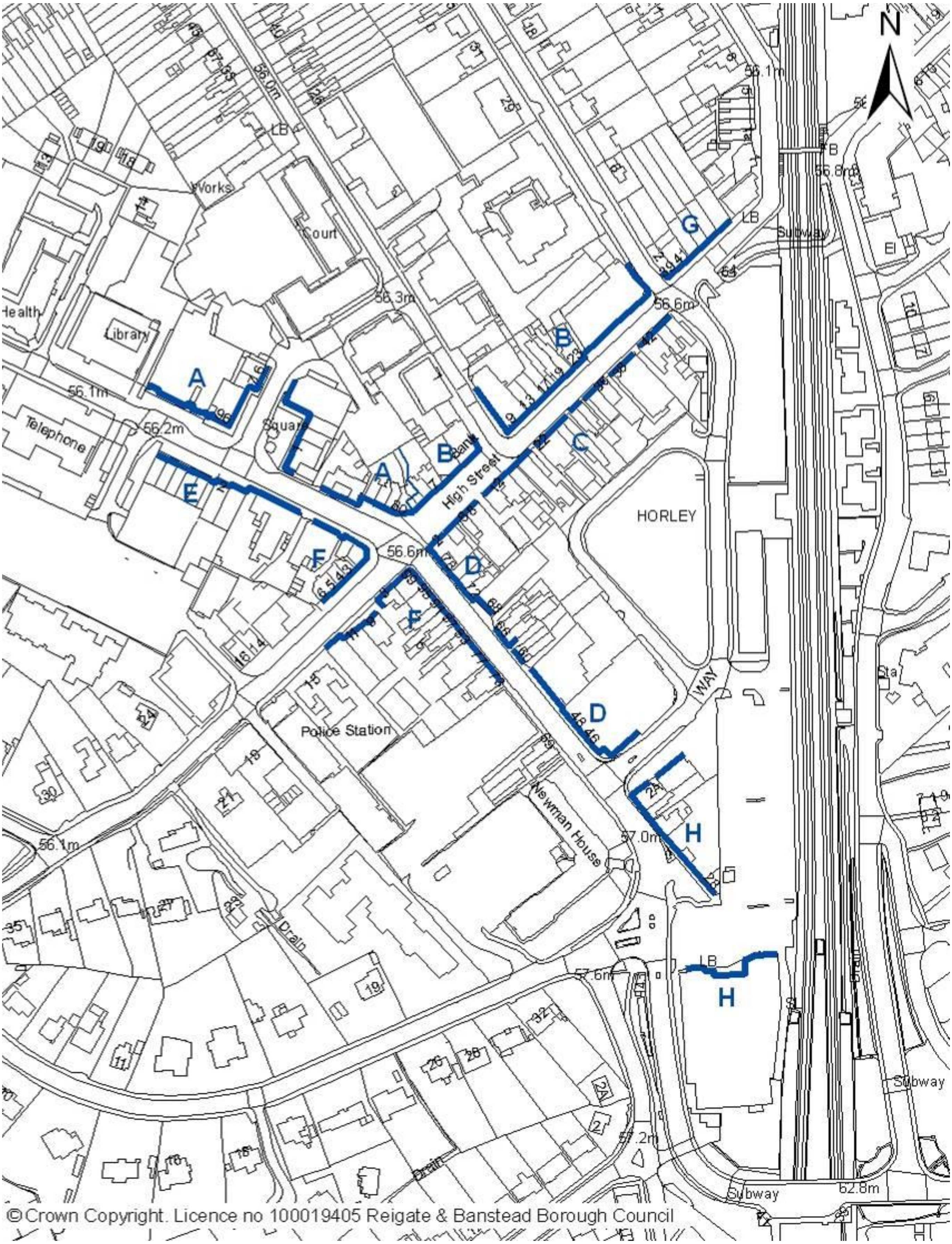
Within the last twelve months the proportion of A1 retail within frontage J and K has remained unchanged whilst frontage I has seen an increase (70% to 82%) due to further occupiers vacating Cromwell Road.

There is considerable variation in the proportion of A1 retail falling within Redhill's secondary retail frontages: frontage I has the greatest proportion of A1 retail (82%) and is the only frontage above the retail threshold (66%) whilst frontage K has the lowest representation (15%) due to Kingsgate and Red Central office developments replacing previous retail frontages with office frontage. As part of the Development Management Policies, retail frontages will be reviewed including whether it remains appropriate to consider frontage 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 located at the south of the borough. It is comprised of several shopping areas oriented around the junction of Victoria Road and High Street. The main High Street is pedestrianized; towards the south there is a large Waitrose supermarket and independent department store (Collingwood Batchelor's). The town centre benefits from Horley Railway Station lying just south of the shopping centre.

Horley was hit hard by the economic downturn, a number of local businesses disappeared and vacancies rose. In 2012 Horley was awarded £100,000 government funding from the 'High Street Innovation Fund' to help reverse this trend and boost vitality. A number of public realm improvements such as the creation of a square outside the Jack Fairman Public House have been completed.

Within the last twelve months the mixed use redevelopment of Newman House has been completed, all four retail units have been let and two of the occupiers (Costa and 51 Degrees North) are now trading.

Vacancies & New Occupiers

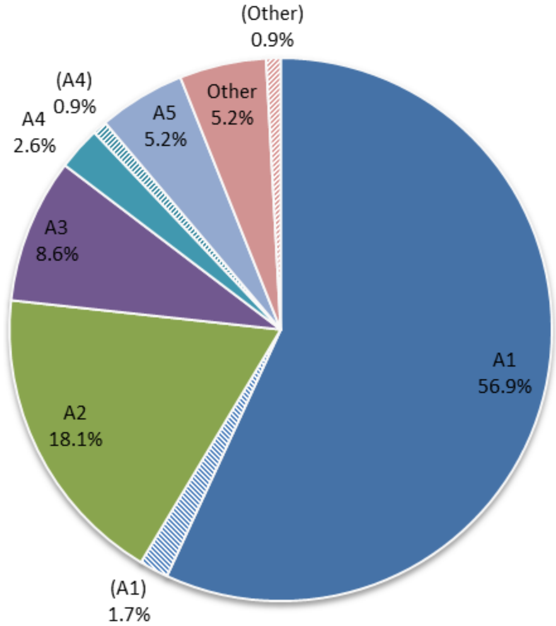
Within the last twelve months there have been a number of occupier changes: 9 new occupiers have moved into the town centre, 1 has expanded into a further 2 units and 7 have left. The number of vacant units has halved (8 to 4), vacant frontage fallen (6.5% to 2.6%) and vacant floorspace fallen (2.5% to 1.0%).

	Vacancy Rate
% of units	3.8%
% of frontage	2.6%
% of net retail floorspace	1.0%

Vitality

A1 to A5 retail frontage accounts for 94% of the total and over half is in A1 use (59%). Specifically within the last twelve months the proportion of occupied A1 has risen from 53% to 57%.

Figure 16 Breakdown of Frontage by Use Class



Reflecting its role as a district centre, compared to the other town centres Horley has the greatest percentage of convenience units (12%) and the second highest percentage of convenience floorspace (37%) (Banstead, the other district centre has the greatest percentage – 38%).

In comparison to the other town centres, Horley continues to have the greatest number of take-aways (7) and charity/ second-hand retailers (9). To ensure the long-term viability this needs continual monitoring to ensure an appropriate mix is maintained.

Table 7 Retail Offer

	Units	Net Floorspace (sqm)
Comparison	27 (25.7%)	5,192 (30.3%)
Convenience	13 (12.4%)	6,286 (36.7%)
Service	37 (35.2%)	3,193 (18.6%)
Food & Drink Leisure	20 (19.0%)	2,052 (12.0%)
Non-Retail	4 (3.8%)	225 (1.3%)
Vacant	4 (3.8%)	178 (1.0%)
Total	**105**	**17,126**

Developments & Use Class Changes

Within the last twelve months a number of developments have been completed:

- 12/01881/F – Newman House: Mixed use redevelopment providing 90 affordable residential units and 4/5 retail/ restaurant units (A1/A2/A3) (189sqm)
- 14/01304/F – 18-20 High Street: Partial demolition and subsequent erection of residential accommodation (99sqm)
- 15/00640/PAP3O – 100 Victoria Road: Office to residential permitted development (1,038sqm)

There are a number of permissions under construction which would lead to a 4,630sqm loss of commercial floorspace:

- 14/00317/F – Saxley Court, 121-129 Victoria Road: Change of use office to residential (1,063sqm)
- 14/02646/P3JPA – Beulah Court, 15-19 Albert Road: Office to residential permitted development (1,979sqm)
- 14/02647/P3JPA – Consort House, Consort Way: Office to residential permitted development (288sqm)
- 13/01912/P3JPA – Imperial Buildings, 68-70 Victoria Road: Office to residential permitted development (973sqm)
- 15/02148/PAP3O – 39-41 High Street & 2 Lumley Road: Office to residential permitted development (440sqm)
- 15/00778/F – 3 Massetts Road: Conversion of attic to A2 (26sqm)
- 15/00500/F – Land Parcel at 71 Victoria Road: Mixed use redevelopment comprising retail (87sqm) and residential

There are also a number of outstanding planning permissions which if delivered would lead to a 295sqm loss of commercial floorspace:

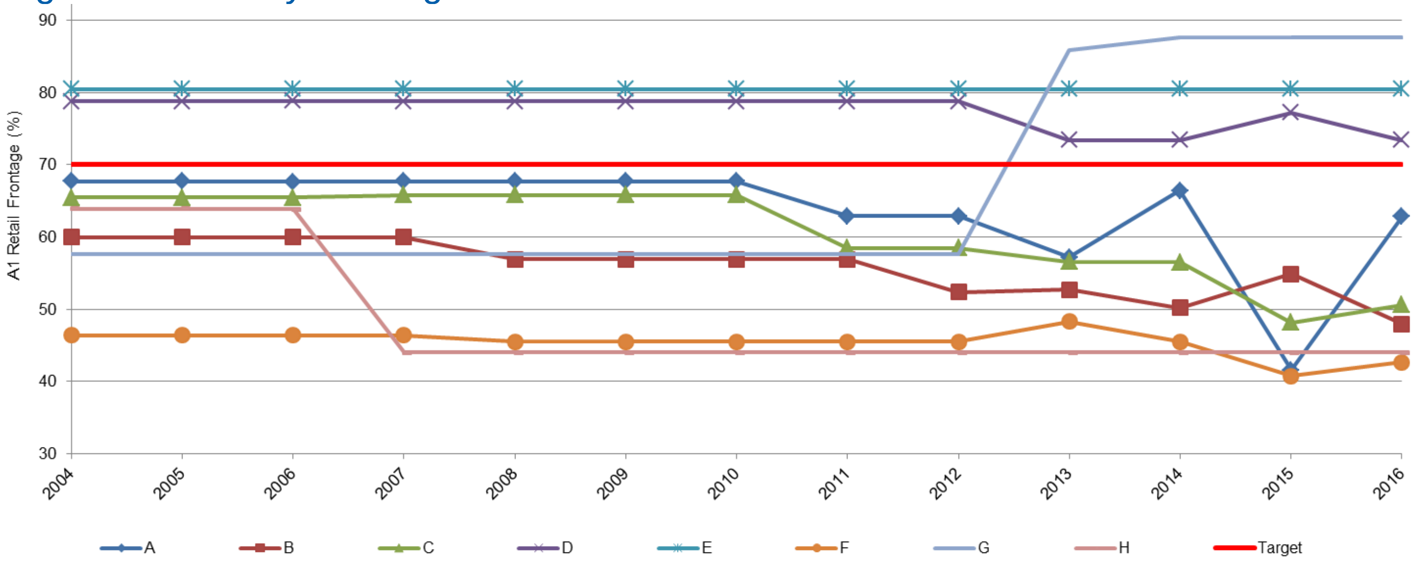
- 14/00913/P3JPA – 80-82 Victoria Road: Office to residential permitted development (170sqm)
- 14/02542/F – 1 Yattendon Road: Replacement building and demolition of existing workshop (A1 -2sqm)
- 15/00386/CU – 19 High Street: Change of use A1 to A3
- 15/01275/PAP3O – Dartel House, 2 Lumley Road: Office to residential permitted development (123sqm)

Frontages

Within Horley Town Centre there is considerable variation in the proportion of A1 retail in the frontages: frontage G has the greatest proportion of A1 retail (88%) whilst frontage F has the least (43%) due to a number of estate agents, restaurants and take-aways being located in this frontage.

As has been the case since 2013, frontages D, E and G continue to exceed the 70% A1 retail frontage target (73%, 81% and 88%) whilst frontages A, B, C, F and H continue to fall below this.

Figure 17 Horley Frontage A1 Retail Trend



Appendix

Survey Notes

The survey of occupiers and primary activity is carried out annually. 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 sqm)
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 sqm)
B8	Use for Storage or Distribution.	B1 (where no more than 235 sqm)
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

Temporary permitted development rights have been introduced in respect of a number of potential changes of use between A1, A2, A3, A4, A5, B1, D1 and D2 uses. These rights permit the use to change for a maximum period of two years and subject to a floorspace threshold of 150qm.

Permitted development rights to allow the change of use from A1/A2 to C3 (residential) have also been introduced. These rights are subject to a prior approval process to ensure that the proposed change would not result in inadequate provision of A1 or A2 services or harm the sustainability of a shopping area. Floorspace is limited to 150sqm.

Permitted developer rights also exist, until May 2016, for the change of use from B1(a) to C3 (residential) subject to a prior approval process.

Full occupier schedules for each of the industrial estates are available on request. Please contact the Policy Team on 01737 276000 or email LDF@reigate-banstead.gov.uk.

Monitoring Publications

Regular Monitors:

Commercial Development

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

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:

Planning Policy Team

Tel: 01737 276000

Email: LDF@reigate-banstead.gov.uk