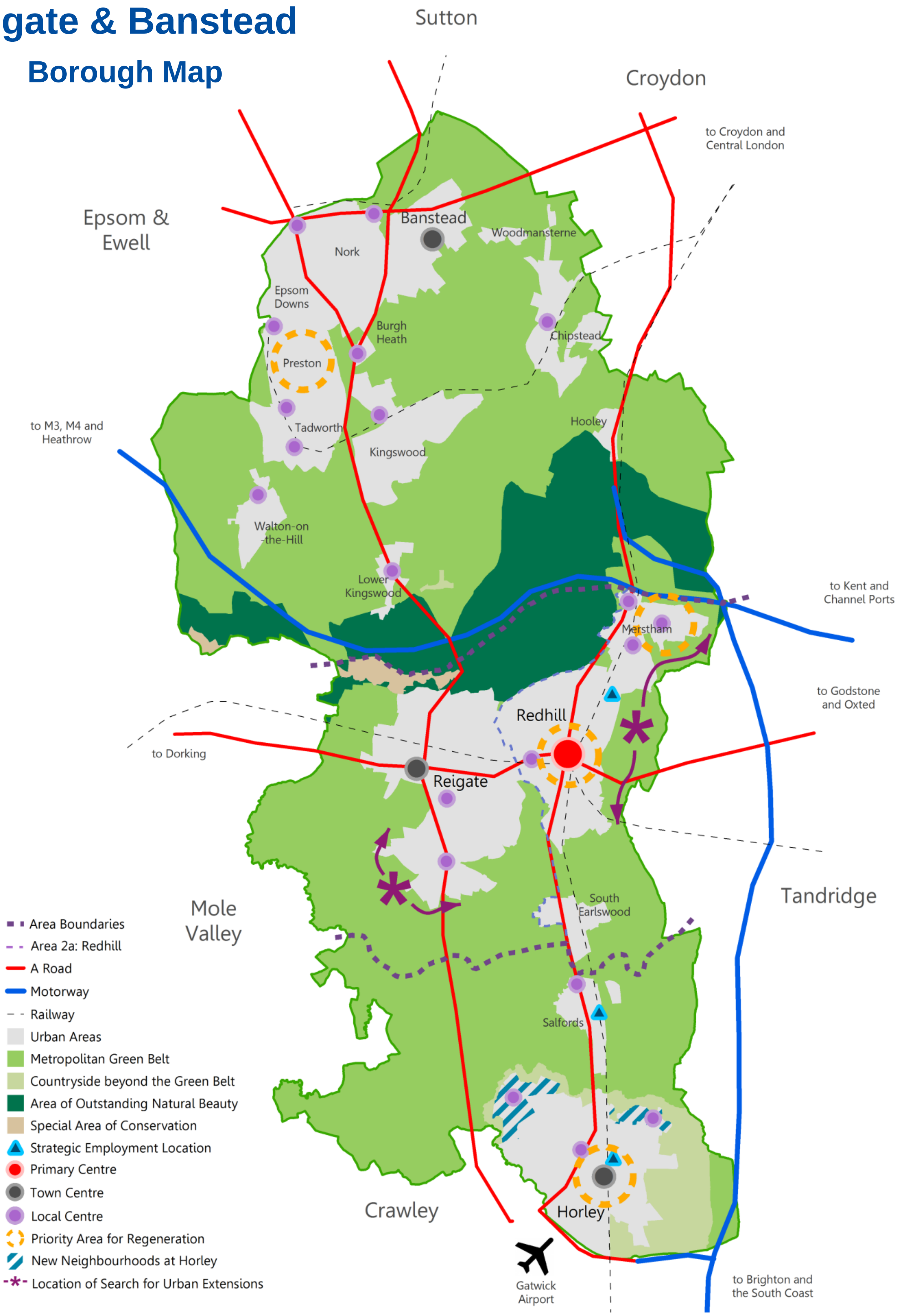
Town Centre Monitor

2017

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

Reigate & Banstead

Borough Map



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2017

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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 Core Strategy was formally adopted in July 2014; it details how much growth will take place until 2027 and sets out the overarching strategic approach for delivering new homes in the Borough. The Development Management Plan, which is currently being prepared, will contain detailed policies relating to the management of development within the town centres policies and allocate sites for development across the Borough. 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%

Planning 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 recognises the different sizes and retail roles of the town centres:

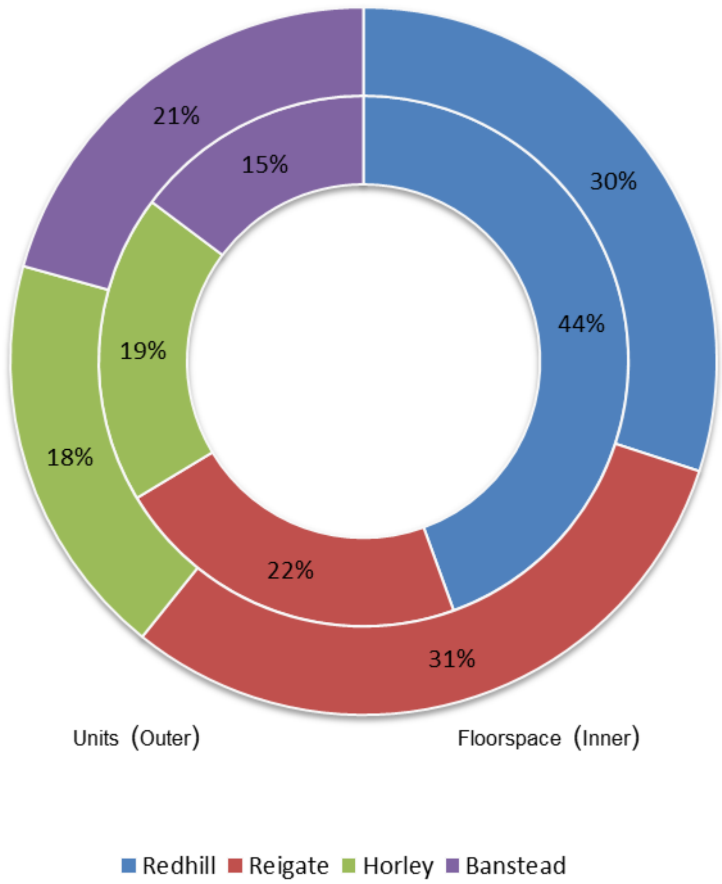
- **Redhill -** is the primary town centre and the focus of future leisure, office and comparison retail growth due to its strong transport links and role as a Regional Hub
- **Reigate -** is the secondary town centre, serving as a convenience destination with a strong range of independent and specialist 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 567 units, 90,709sqm of retail floorspace and 4,851sqm of retail frontage.

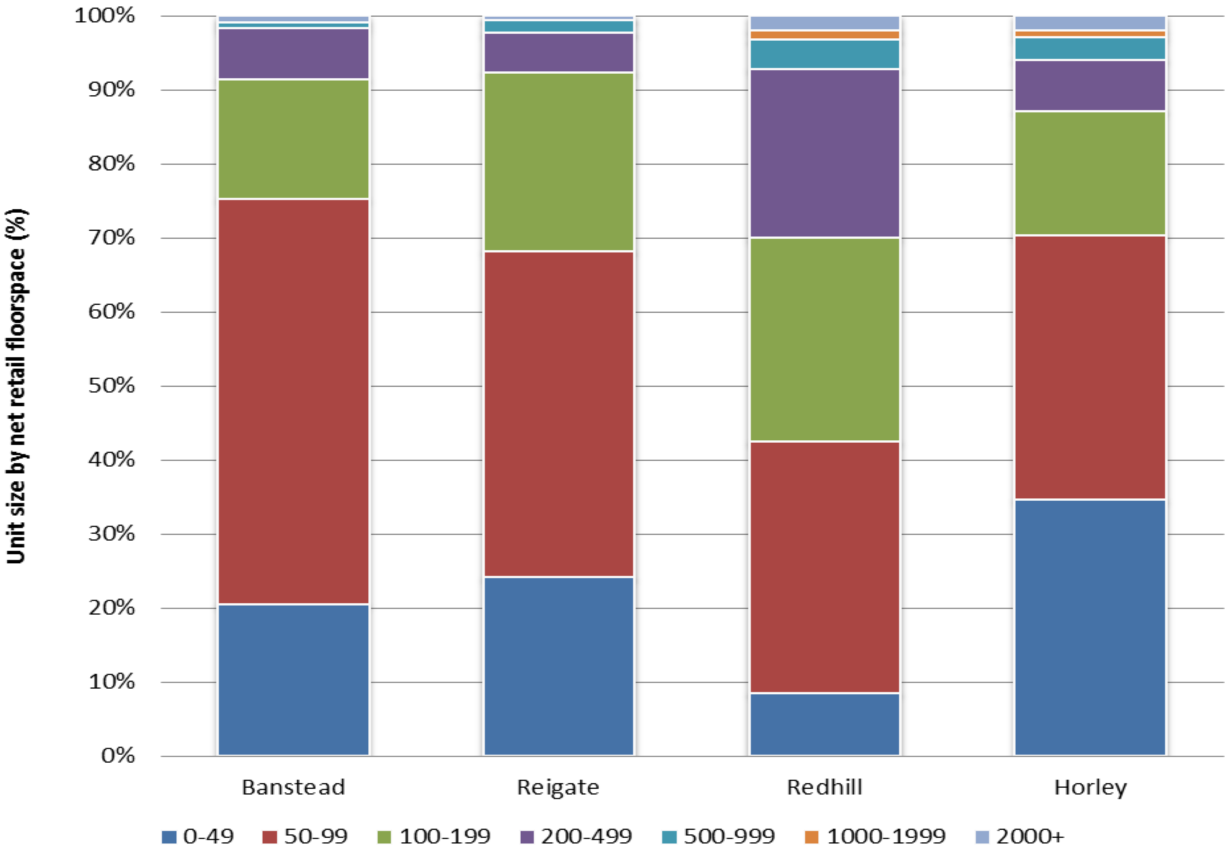
Highlighting its position as the borough's primary town, almost half (44%) of the floorspace is in Redhill. Reigate has 22% followed by Horley (19%). Banstead is the borough's smallest town centre accounting for 15% of the total retail floorspace. Just over 30% of the units are located in Redhill with 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 Retail Units & Floorspace



Redhill has the greatest percentage of retail units of 100sqm or larger (59%) whilst Banstead, Horley and Reigate have greater proportions under 100sqm (75%, 70% and 68%). 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 Total Retail 2017 Report, shopping is now firmly established as an online phenomenon. 82.1% of U.K respondents said they shop online at least once a month, with 62.1% making their first purchase more than five years ago. This has been fairly consistent over the past three years, although participation has become more common (occurring weekly rather than monthly). In-store still remains the most popular way to shop regularly, but is closely followed by online shopping.

In 2016 the total value of UK retail sales reached £358 billion, with an average annual growth of online retail sales of 10% according to Retail Economics. As a continuing trend, the high street is moving away from traditional retail to offer a greater leisure experience (entertainment, food & drink and retail).

The Local Data Company report that at the end of 2016, UK retail vacancy stood at 12.2% having declined by 0.5% in the year and was -2.4% below its historic peak in 2012. They also highlight that half way through 2016, the EU referendum slowed the openings and closures of retailers under the created conditions of political and economic uncertainty. However, in the latter half of 2016 the vacancy rate recovered and made gains, making up for any damage caused by the referendum.

Deloitte report that conditions in 2017 have become more challenging for retailers following increases in business rates, rising staff costs and depreciation of the sterling. According to their retail trends, the traditional highstreet store will undergo a greater rate of change as e-commerce continues to deliver goods conveniently and at a competitive price.

Borough Key Messages

- **Vitality:** A1 remains the dominant use within the borough's town centres; within the past twelve months there has been a marginal increase in the proportion of A1-A5 units (96.2% to 96.3%) within which the proportion of A1 units has increased (67.6% to 69.0%).
- **Retail Uses:** Comparison retail occupies 37% of all units within the borough's town centres. Over 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 (27%).
- **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 fallen (7.2% to 5.1%) due to a decrease in the number of vacant units (41 to 29). The borough vacancy rate falls significantly below the national average of 12.5%. In this monitoring all four areas have experienced a fall in their vacancy rate; Banstead (6.0% to 2.5%), Reigate (2.9% to 1.7%), Redhill (14.2% to 11.7%) and Horley (7.7% to 3.8%).
- **New Occupiers:** 39 new occupiers have moved into the four town centres within the past year: Horley saw the greatest increase (13), Reigate and Redhill saw the least (8 each).
- **Planning Permissions:** There are currently 46 planning permissions which have the potential to deliver a net loss of floorspace of 3,818sqm of floorspace. Of these planning permissions 14 are under construction (-5,739sqm) and a further 32 are not started (+1,921sqm).

Vacancies & New Occupiers

Vacancy Trend

Within the monitoring period the number of vacant units has decreased (41 to 29): all towns have seen decreases, Banstead 7 to 3 units, Reigate 5 to 3 units, Redhill 25 to 20 units and Horley 4 to 3 units.

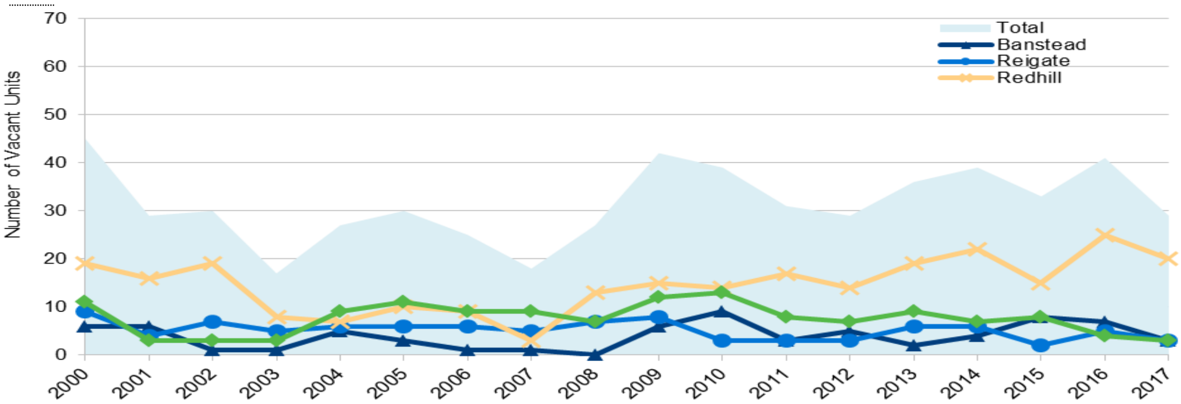
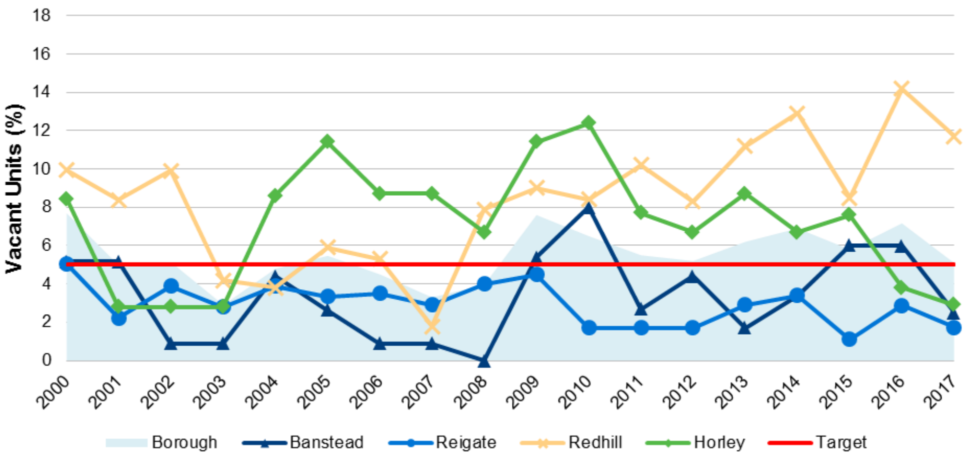


Figure 3 Number of Vacant Units (2000-2017)

The borough's vacancy rate has fallen from 7.2% to 5.1%: all towns have seen a fall in their vacancy rate.

The borough has a vacancy target of 5%: for the second time since 2004 Horley has a vacancy rate below this at 3.8%, Reigate's remains below at 1.7%, Banstead has also fallen below the target to 2.5%. Redhill is the only town to still above the 5% target at 11.7% however the towns' vacancy rate did fall from the previous value of 14.2%.

Figure 4 Percentage Vacancy Rate (2000-2017)



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 fell from 7.2% to 5.1%. Vacant floorspace also fell from 5.0% to 3.0%.

Table 1 Summary of Current Vacancy Position

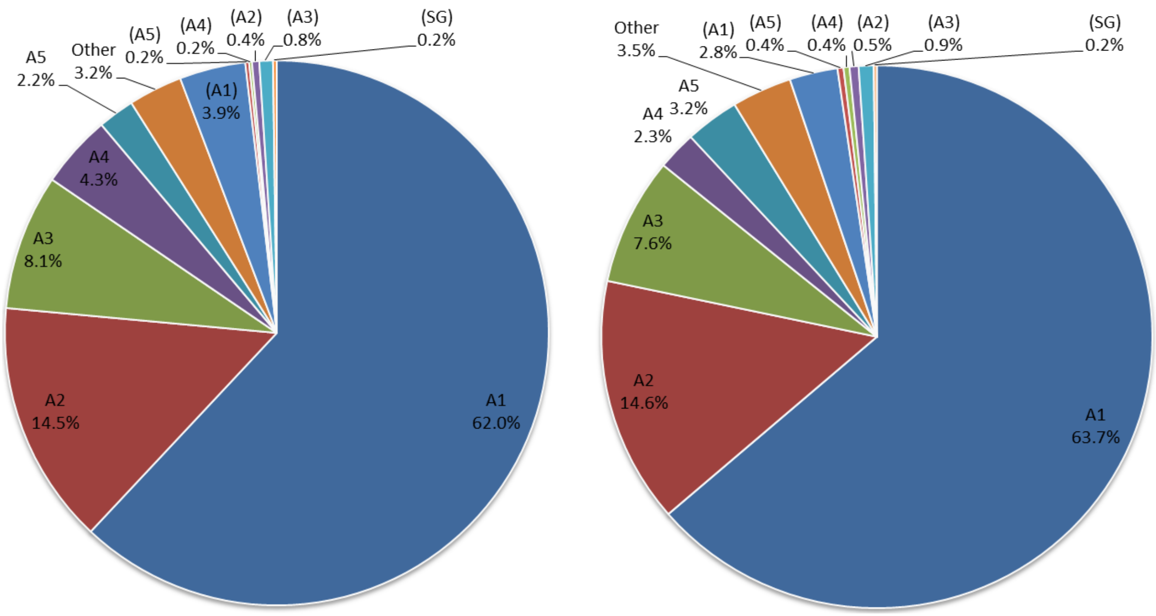
	Vacant	Vacancy Rate
Units/Premises (No.)	29	5.10%
Frontage (Metres)	308.4	5.80%
Floorspace (Sqm)	3,935	3.00%

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.

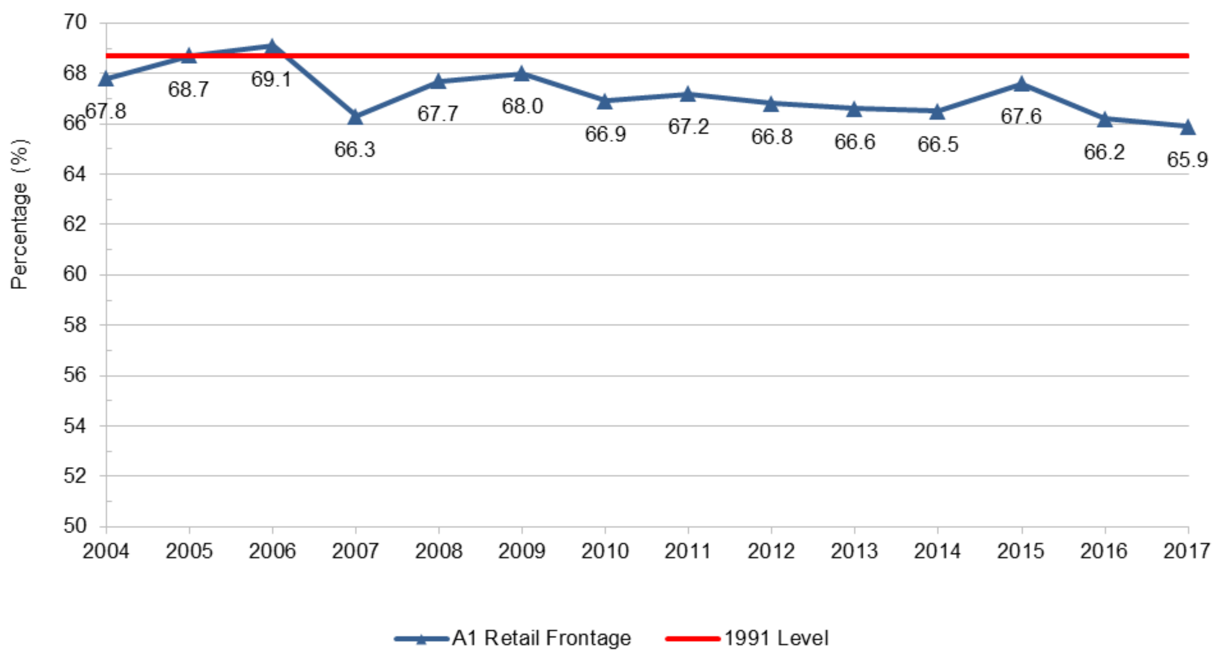
The majority of units across the town centres fall within A1 to A5 use (96.3%) of which 69.0% are A1 (this compares to 96.2% and 67.6% previously).

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 a slight fall over recent years, currently A1 represents 65.9% of the total occupied frontage.

Figure 6 A1 Retail in Town Centre Units (2004 – 2017)



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. Food & drink and comparison increased their share in the borough by 1% and the number of vacant units falling by 2%. All other retail offers have performed consistently in-line with the previous monitoring period.

Convenience retail continues to account for the lowest percentage of retail units (9%) but makes up just over a quarter of the floorspace (28%), this is largely due to the dominance of larger format supermarkets such as Lidl's and Waitrose in Horley, Sainsbury's in Redhill and Morrisons in Reigate.

Services continue to make up the second highest percentage of units (31%) however they only take up 15% of the retail floorspace, suggesting that they tend to occupy smaller units.

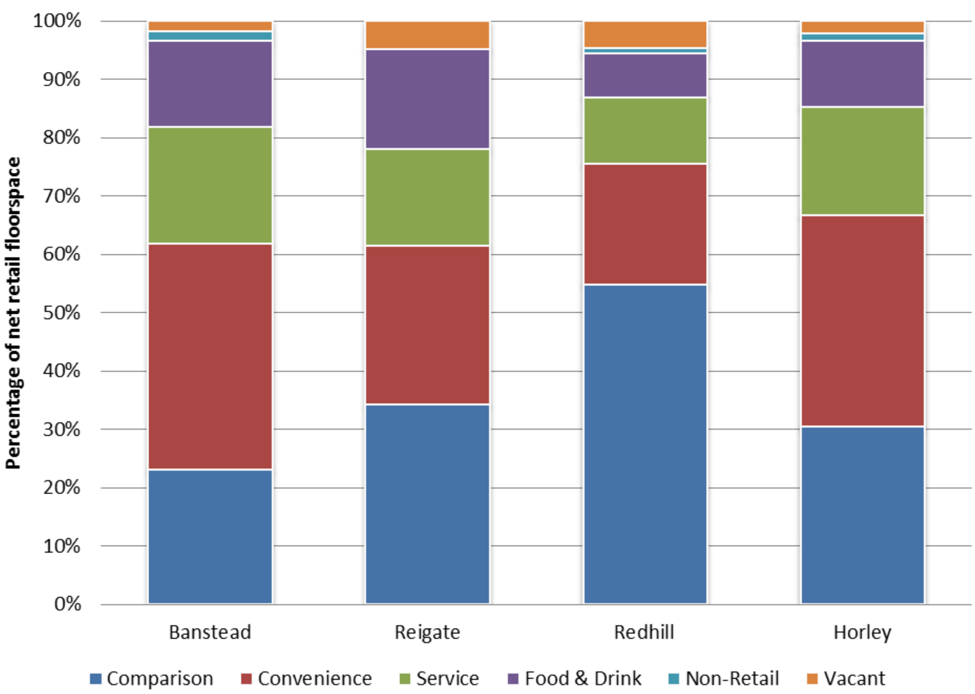
Table 2 Breakdown of Retail Offer

	Units	Floorspace(sqm)
Comparison	208 (36.7%)	37,191 (41.0%)
Convenience	51 (9.0%)	25,146 (27.7%)
Service	177 (31.2%)	13,763 (15.2%)
Food & Drink Leisure	89 (15.7%)	10,336 (11.4%)
Non-Retail	13 (2.3%)	818 (0.9%)
Vacant	29 (5.1%)	3,455 (3.8%)
Total	**567**	**90,709**

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.

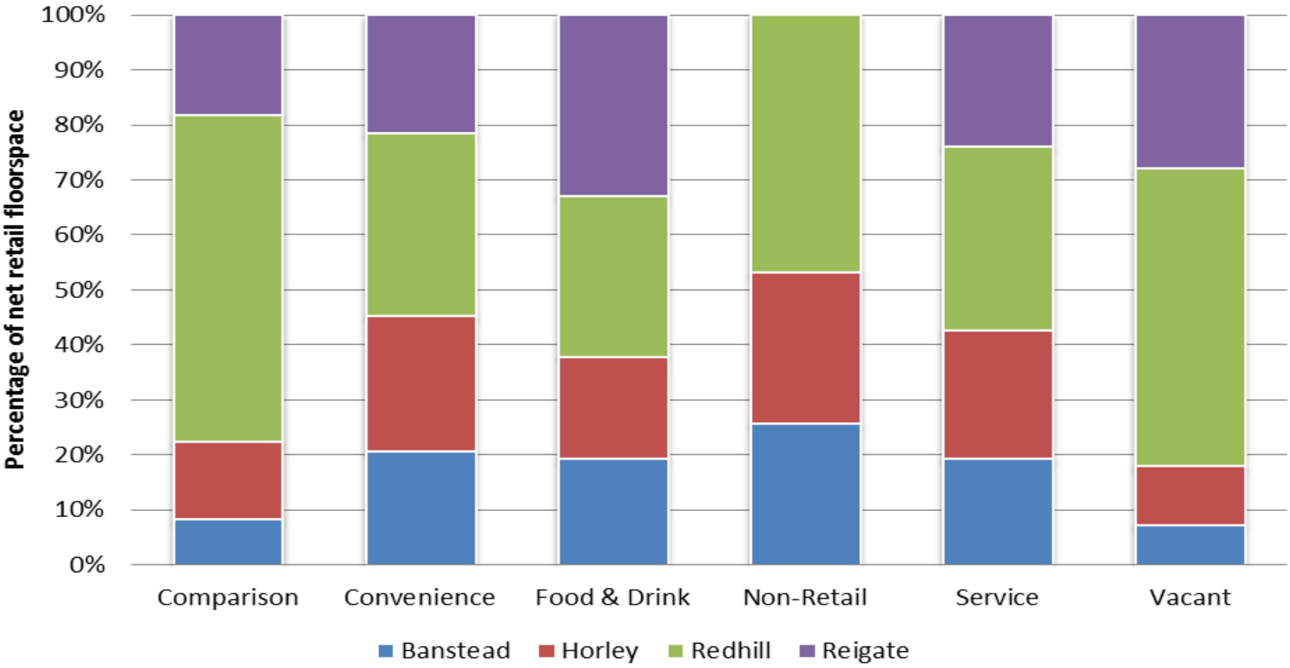
Specifically reflecting the different roles of the town centres, the diagram shows that the majority of the floorspace in Redhill is comparison (54.8%), similarly in Reigate (34.2%). Convenience occupies the greatest percentages in Banstead and Horley (38.8% and 30.4%).

Figure 7 Retail Offer by Centre



The graph 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 (32.8%).

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. Comparison retail continues to occupy the greatest proportion of the units (37%) followed by services (31%). Food & drink leisure occupies a further 16%.

Almost two-thirds (66%) of comparison retail is clothing, footwear & accessories (35%), home & DIY (17%) and charity/ second-hand (14%). Noteworthy, almost half (49%) of the clothing, footwear & accessories providers are located in Reigate.

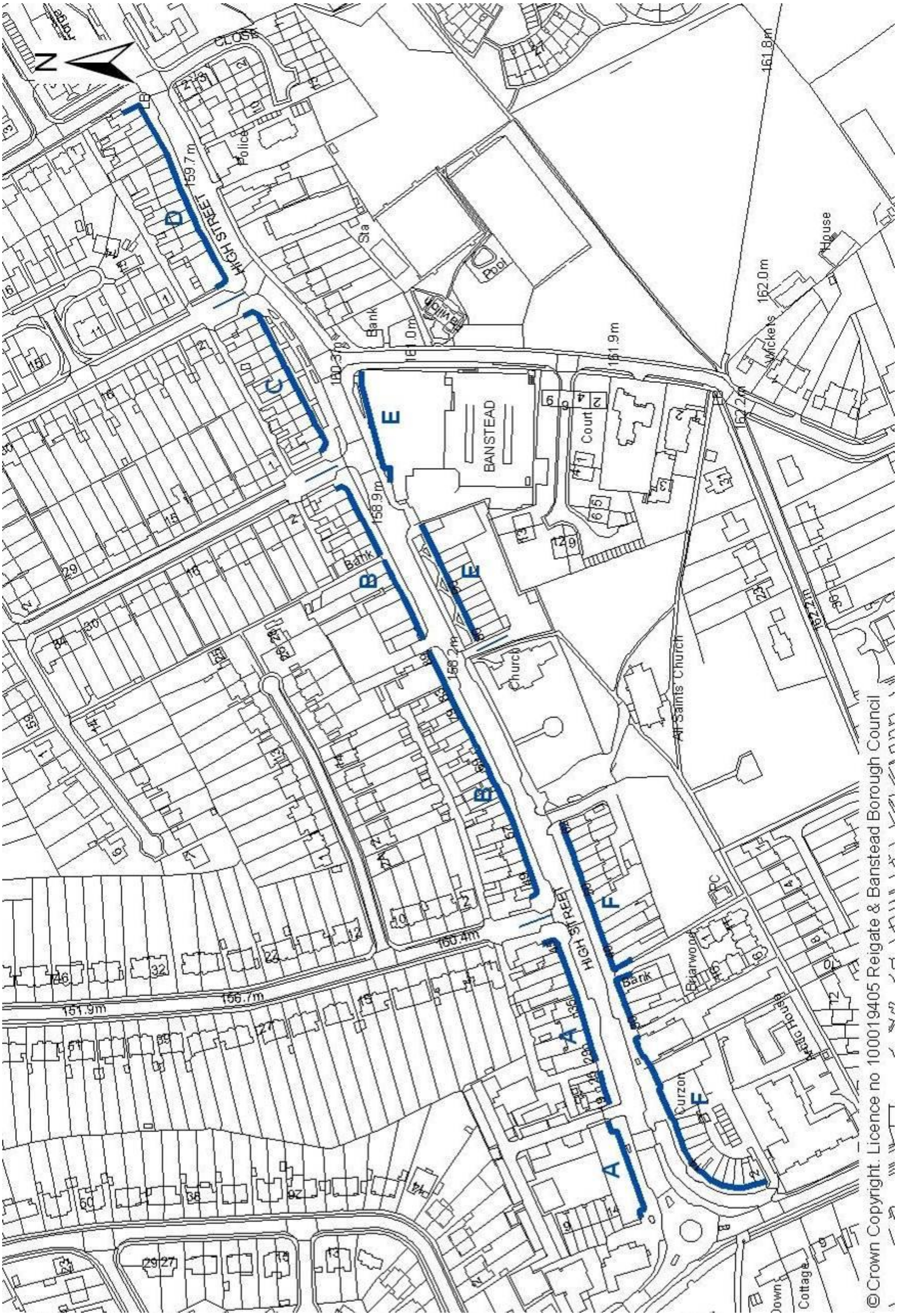
Together hair & beauty providers and estate agents occupy almost half of the service units within the borough (51% - 27% and 24%). Whilst the number of hair & beauty providers is relatively evenly spread across the borough's four town centres, the number of estate agents varies. Reigate has the greatest number of estate agents (13) whilst Banstead has the least (7).

Over two-thirds of the food & drink establishments within the borough are restaurants (35%) or café/ sandwich bars (30%). Reigate has the greatest number of both (13 and 8); Redhill and Horley have the fewest restaurants (5) and Horley also has the fewest café/ sandwich bars (3). Conversely, almost half of the take-aways are located in Horley (7).

Table 3 Detailed Breakdown of Retail Categories (Units)

Comparison	Banstead	Reigate	Redhill	Horley	TOTAL
Clothing, Footwear & Accessories	10	35	20	7	72
Bookshops & Stationers	1	4	5	1	11
Home & DIY	11	14	4	6	35
Electronics & Technology	2	3	6	0	11
Charity/Second-Hand	9	6	6	9	30
Toys, Games & Sports	0	3	2	0	5
Other Comparison Retail (e.g. Gifts, Florists)	6	13	21	4	44
Total Comparison	**39 (33.3%)**	**78 (44.8%)**	**64 (37.4%)**	**27 (25.7%)**	**208 (36.7%)**
Convenience					
Food/Supermarket	9	7	6	6	28
Newsagents	1	2	4	3	10
Chemist/Pharmacy	4	2	4	3	13
Total Convenience	**14 (12.0%)**	**11 (6.3%)**	**14 (8.2%)**	**12 (11.4%)**	**51 (9.0%)**
Service					
Travel Agents	1	1	3	0	5
Hair & Beauty	14	13	12	9	48
Opticians	6	5	5	1	17
Banking	5	7	9	5	26
Estate Agents	7	13	10	12	42
Bookmakers	2	1	5	2	10
Dry Cleaning	2	3	2	3	10
Other Services (e.g. Employment, Repairs)	4	5	3	7	19
Total Service	**41 (35.0%)**	**48 (27.6%)**	**49 (28.7%)**	**39 (37.1%)**	**177 (31.2%)**
Food & Drink Establishments					
Restaurant	8	13	5	5	31
Take-away	5	5	1	7	18
Café/Sandwich Bar	6	8	8	5	27
Pub/Club	0	6	4	3	13
Total Food & Drink Establishments	**19 (16.2%)**	**32 (18.4%)**	**18 (10.5%)**	**20 (19.0%)**	**89 (15.7%)**
Non A Class	1 (0.9%)	2 (1.1%)	6 (3.5%)	4 (3.8%)	13 (2.3%)
Vacant	3 (2.6%)	3 (1.7%)	20 (11.7%)	3 (2.9%)	29 (5.1%)
TOTAL	**117**	**174**	**171**	**105**	**567**

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

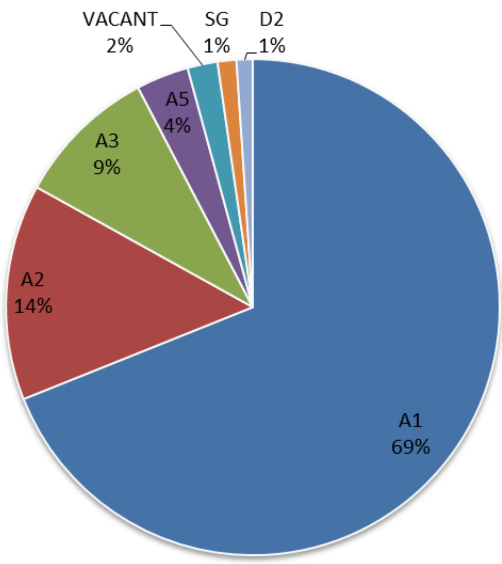
There have been a number of occupier changes: 8 new occupiers have moved into the town centre and 4 have left. This has led to a reduction in the number of vacant premises (7 to 3) and correspondingly a fall in the percentage of vacant units from 6.0% to 2.6%.

	Vacancy Rate
% of units	2.6%
% of frontage	2.0%
% of net retail floorspace	1.9%

Vitality

Primary retail uses (A1-A5) dominate Banstead's retail frontage, accounting for 96% of the total frontage. Specifically A1 retail makes up 69% 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 (35%), followed by comparison (33%) and food & drink (16%). Convenience occupies more than a third of retail floorspace, followed by comparison (23%) and services (20%). 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	39 (33%)	3,077 (23%)
Convenience	14 (12%)	5,198 (39%)
Service	41 (35%)	2,661 (20%)
Food & Drink Leisure	19 (16%)	1,986 (15%)
Non-Retail	1 (1%)	210 (1%)
Vacant	3 (3%)	249 (2%)
Total	**117**	**13,381**

Development & Use Class Changes

Within the monitoring period no planning applications were completed within Banstead.

six new planning permissions are under construction; these have the potential to deliver net 154sqm of commercial floorspace:

- 16/01429/F - 133 High Street, refurbishment and single storey rear extension of an existing ground floor retail unit, increasing A1 floorspace by 60sqm.
- 16/01567/F - 43 High Street, change of use and extension from A1 to part A1/part A3, net loss of A1 33sqm and net gain of A3, 90 sqm.
- 16/00882/F – Oscars 59 High Street, Demolition of existing single storey kitchen and external WC buildings to the rear and provision of a new single storey extension to increase the existing retail unit floor area. A1 floorspace to increase by 56sqm.
- 13/01260/CU – Lorimers 46 High Street, Change of use of first floor to residential, A1 loss 220sqm
- 14/01427/F – The Ibis Bookshop, High Street, Single storey rear extension to existing A1 premises, A1 gain 67sqm
- 15/00579/F - Giles Lesley Florist, 89 High Street, Construction of a new 3 storey building, accommodating A3 unit to ground floor, gain of 134sqm

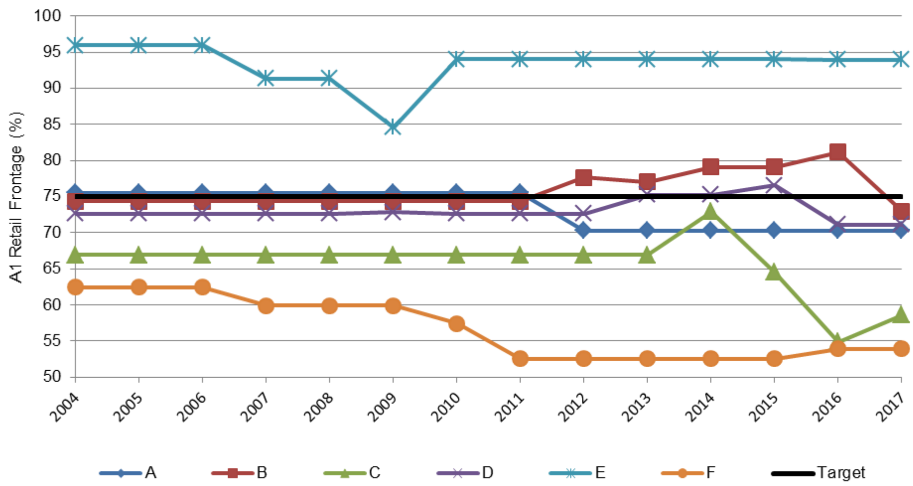
There are a number of outstanding planning permissions; if delivered they will increase commercial floorspace by 25sqm:

- 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
- 14/00843/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
- 15/02359/CU – 57 High Street, Change of use from Class A2 (Financial and Professional Services) to Class A5 (Hot Food Takeaway) and external alterations. 113 sqm of A5 gained and the equivalent amount of A3 lost.

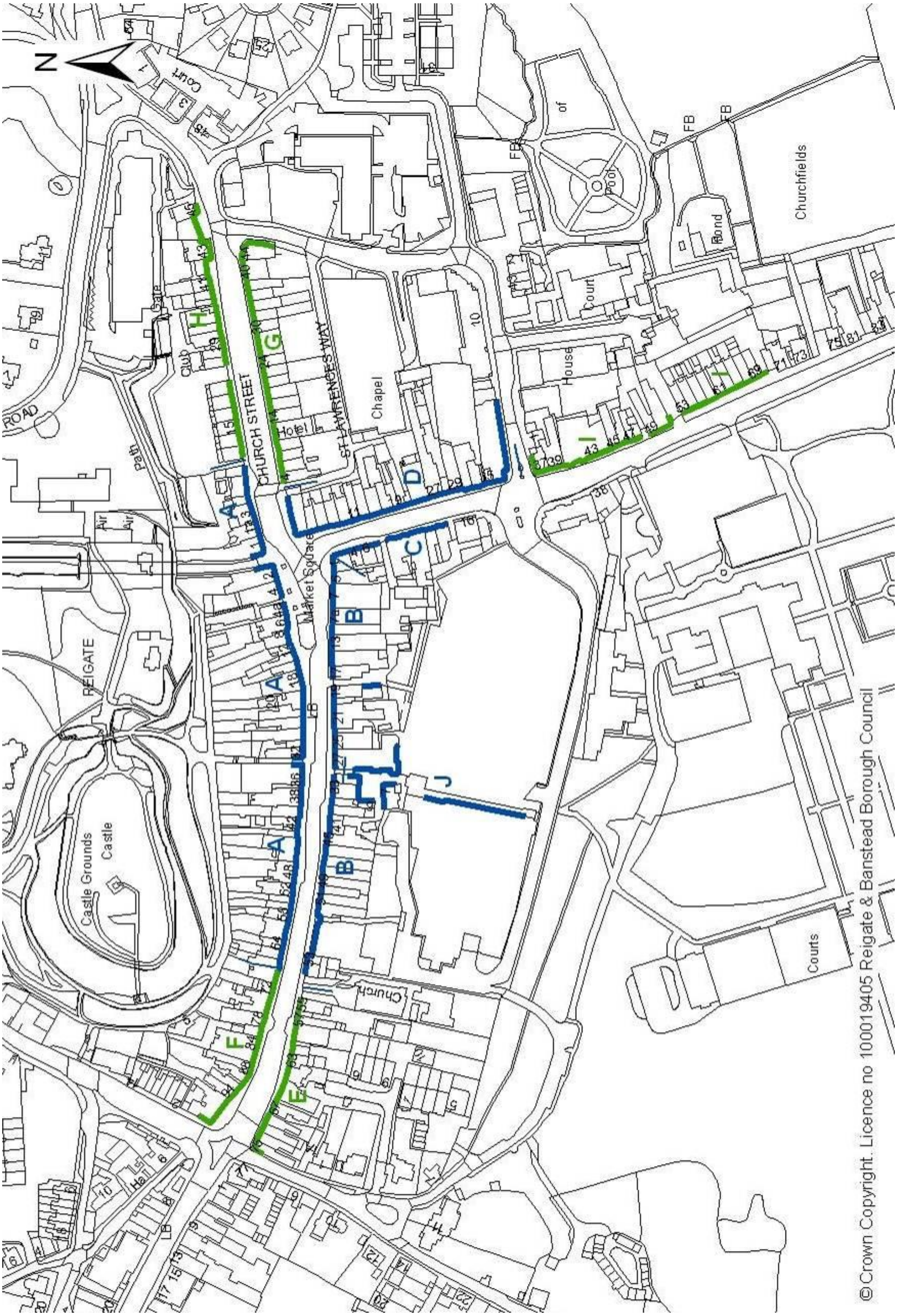
Frontages

Banstead continues to have a strong A1 retail frontage. Frontage E continues to exceed the 75% threshold requirement at 94%, whilst frontage B has dropped to just below 75%following the occupation of previously vacant shops by Dominos (A5), Wine Shop (A1), Fego (A3) and Subway (A5). Once again frontage F falls considerably below the A1 requirement (53%) due to having a number of large fronted A2 and A3 units but has recorded a consistent A1 frontage in recent years.

Figure 9 Banstead Frontage A1 Retail Trend (2004 - 2017)



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 a decrease in the number of vacant units (5 to 3), vacant frontage (6.7% to 5.7%) and vacant floorspace (5.9% to 4.9%).

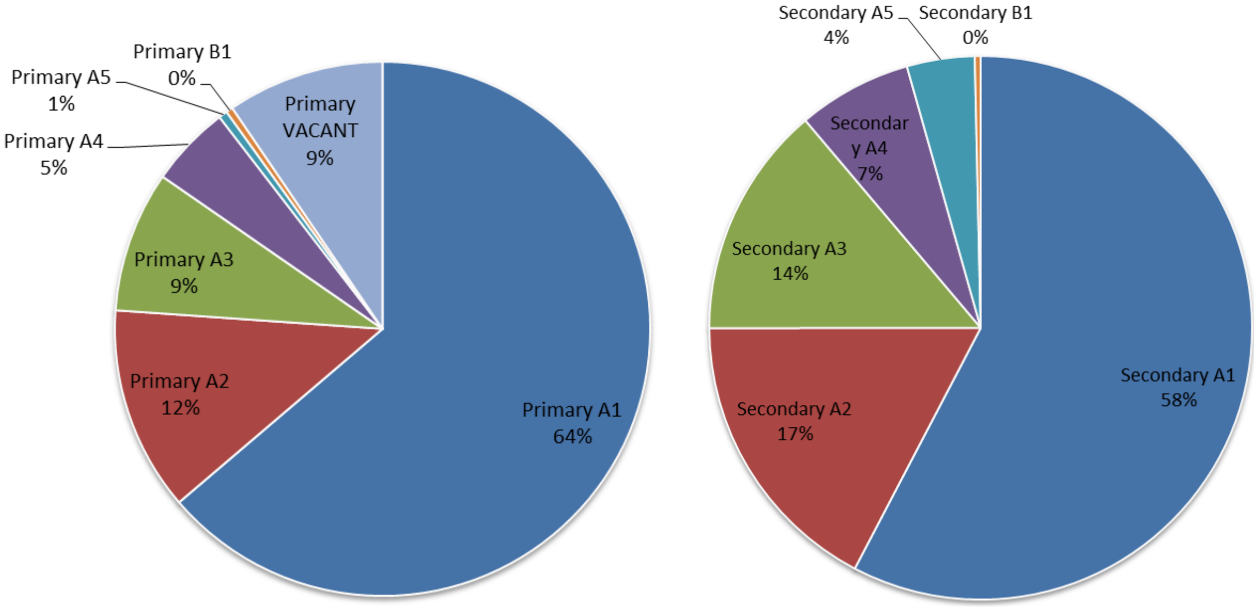
8 new occupiers have moved into the town centre within this monitoring period and 6 have left. Three of the vacant units are undergoing refurbishments or subject to live planning applications and – subject to approval – may be occupied shortly.

	Vacancy Rate
% of units	1.7%
% of frontage	5.7%
% of net retail floorspace	4.9%

Vitality

Reigate continues to have the highest proportion of frontage of all 4 town centres falling within A1 to A5 use classes (91%). 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 64% (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 17%). The majority are located 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 of any town centre in the borough (45%). This is largely due to the high number of boutique shops selling specifically homewares, gifts, clothing, footwear and accessories. 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	78 (45%)	6,787 (34%)
Convenience	11 (6%)	5,399 (27%)
Service	48 (28%)	3,305 (17%)
Food & Drink Leisure	32 (18%)	3,500 (17%)
Non-Retail	2 (1%)	0 (0.0%)
Vacant	3 (2%)	968 (5%)
Total	**174**	**19,859**

Development & Use Class Changes

Within the last twelve months there have been 3 developments completed within Reigate town centre, leading to a commercial net loss of 997sqm:

- 15/01186/PAP3O – Liberty House Bell Street, office to residential permitted development, leading to a loss of 852sqm B1(A)
- 15/01810/CU – Priory Gate, 18 Castlefield Road, a change of use from existing office business use (B1) to non-residential institution (D1) to establish a day support hub for adults with disability. A gain of 231sqm of D1 floor space and an equivalent loss of B1(A).
- 16/01070/F – Morrisons, 22-32 Bell Street, existing Pharmacy within store removed and area added to overall sales floor. New Pharmacy proposed within existing external trolley store area. 86sqm A1 gained.

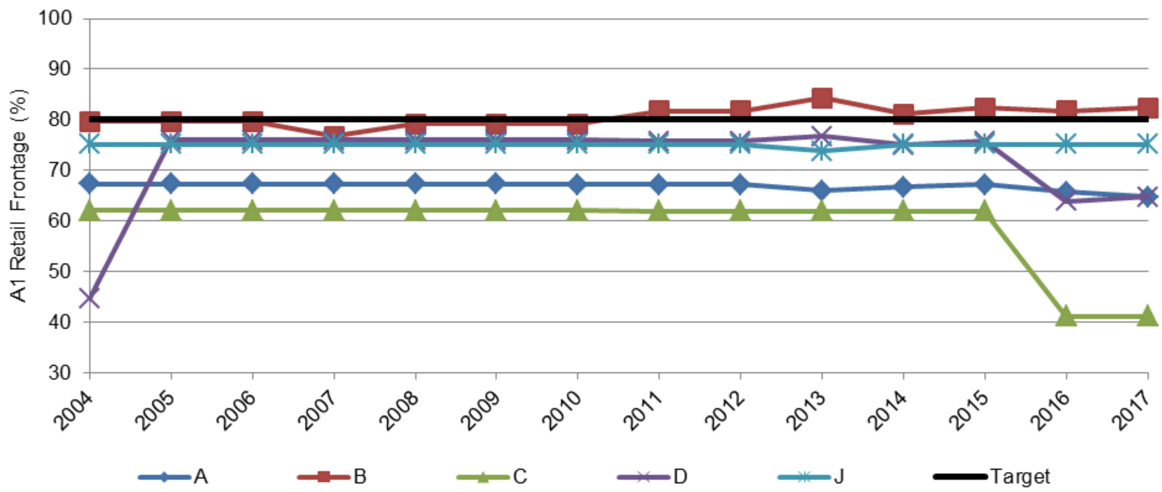
There are also 10 outstanding permissions that, if delivered, will result in a net loss of 1574sqm of commercial space primarily due to a number of permitted development rights schemes that will convert office and storage space into residential dwellings, namely 16/01324/P, 16/00807/P, 16/01069/P, 16/02497/PAP and 16/02498/PAP.

Frontages

Primary

Frontage B (82%) continues to be the only primary frontage to exceed the 80% threshold for A1 retail, although frontage J has 75%, frontages C and D have stabilized following a previous decline in A1 frontage due to large units closing for redevelopment namely Knight and Sons and 33/35 Bell Street (adjacent to the cinema).

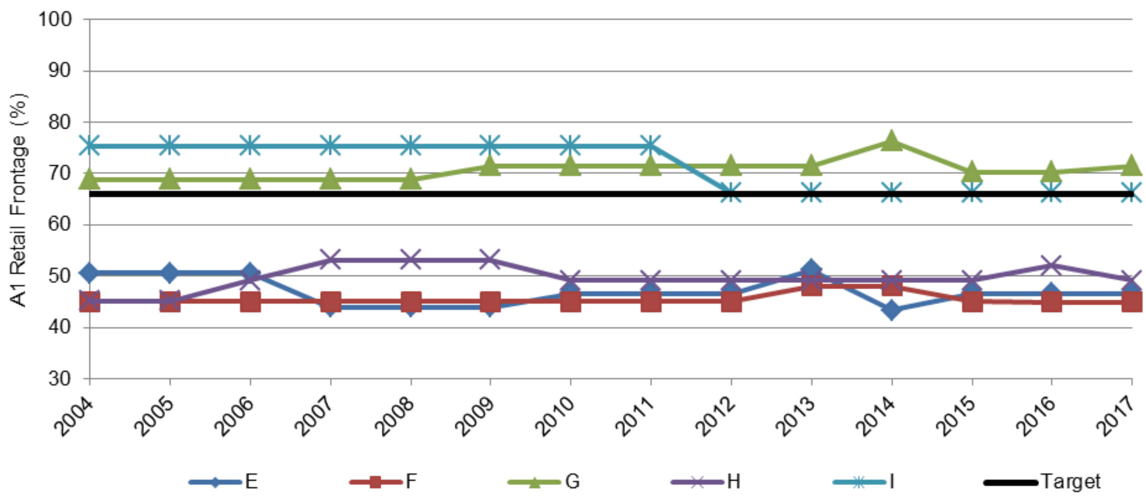
Figure 11 Reigate Primary Frontage A1 Retail Trend



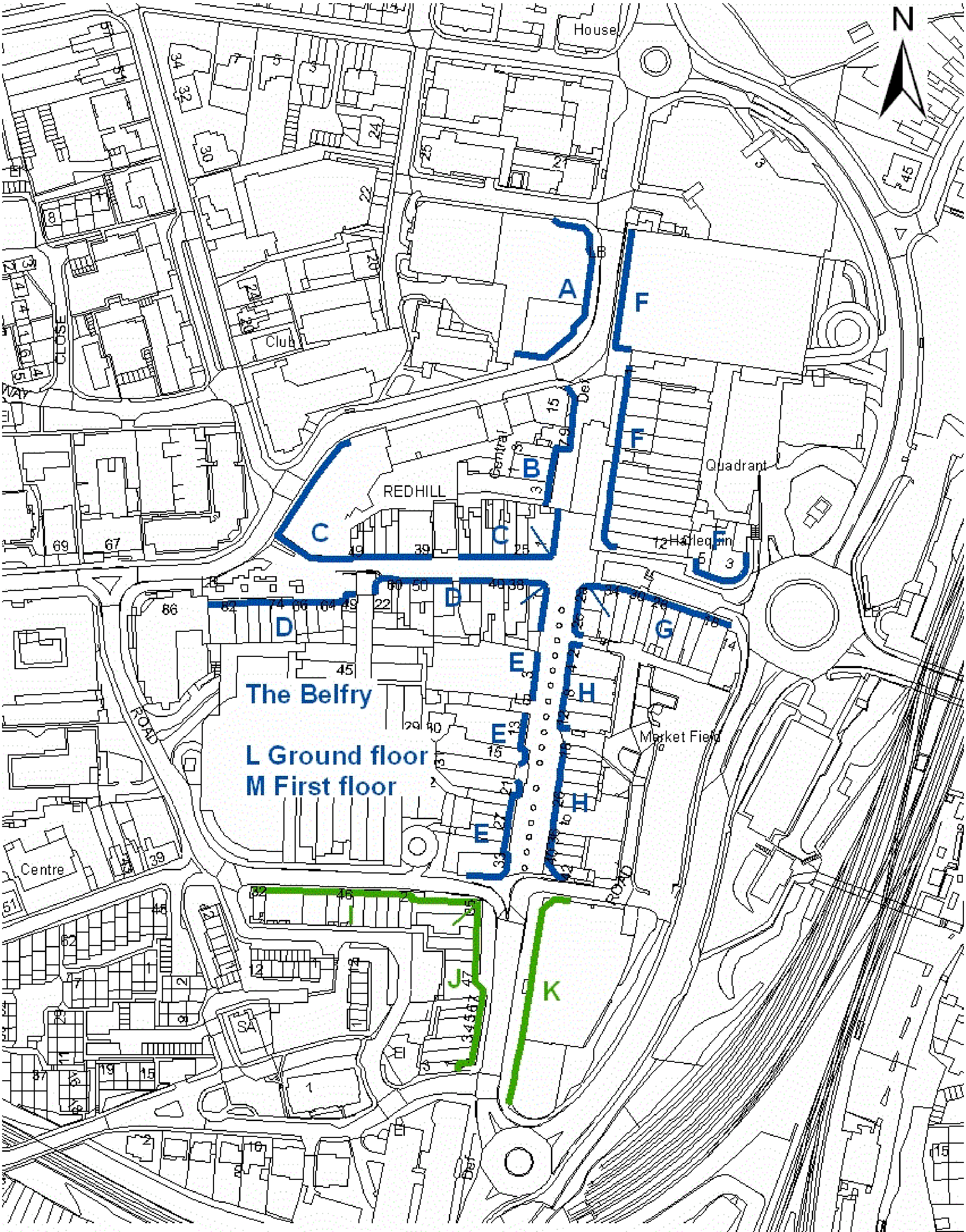
Secondary

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 (72% and 66%) whilst frontages E, F and H continue to fall below (47%, 45% and 49%). Frontage H has seen a slight decrease in the proportion of A1 frontage (52% to 49%).

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 and 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. The town is home to the Belfry Shopping Centre which has just gained H&M as an occupier following the redevelopment of 7 units to form 1 large unit.

Major works have commenced to improve the public realm and townscape including the installation of planters and the replacement of the Harlequin canopy; within the last twelve months the development of a new Sainsbury's supermarket, Travelodge hotel and gym has neared completion. Further works planned include the construction of residential accommodation on the Former Liquid & Envy site and the redevelopment of Marketfield Way to include a Cinema, restaurants, retail and residential accommodation which has recently been granted planning permission.

Vacancies & New Occupiers

There have been a number of occupier changes within the last twelve months, 10 occupiers have moved into Redhill town centre, 10 have left and 2 have relocated to new units (Framed and Toy Barnhaus). H&M have moved into the Belfry following the redevelopment of 7 units into 1 large store. Of these 8 units, 2 were vacant, 1 occupier has relocated within the Belfry and 4 tenants who together occupied 5 units have left the area.

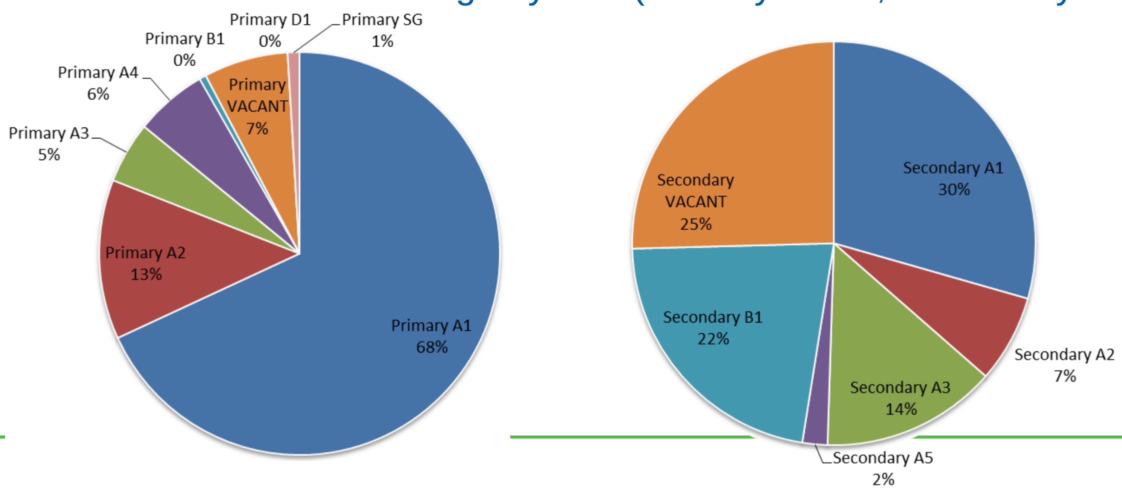
Redhill continues to have the greatest number of vacant premises of all the boroughs town centres. Within the monitoring period the number of vacant units has decreased (25 to 20), vacant floorspace decreased (6.7% to 4.6%) and vacant frontage decreased (11.5% to 9.7%).

	Vacancy Rate
% of units	11.8%
% of frontage	9.7%
% of net retail floorspace	4.6%

Vitality

A1 to A5 uses constitute around 92% of the primary frontage and 75% of the secondary frontage. Redhill's primary and secondary frontages both fall below the A1 requirement, with primary frontage having 68% (against 80% target) and secondary frontage having 30% (against 66% target). The town's secondary frontage is predominantly made up of office frontage and includes the Kingsgate office development 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 in Redhill is considerably lower than the borough's other three centres. Food & drink Leisure floorspace takes up 8% of the total floorspace in Redhill but in comparison Reigate and Horley have just over two times as much (18% and 19%).

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. The current regeneration programmes will help to deliver this.

Table 6 Retail Offer

	Units	Net Floorspace (sqm)
Comparison	64 (35.3%)	22,120 (54.8%)
Convenience	14 (8.2%)	8,351 (20.7%)
Service	48 (28.2%)	4,595 (11.4%)
Food & Drink Leisure	18 (10.6%)	3029 (7.5%)
Non-Retail	6 (3.5%)	383 (1%)
Vacant	20 (11.8%)	1866 (4.65%)
Total	**170**	**40,344**

Developments & Use Class Changes

As part of the regeneration of the town, two major applications are under construction; 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

One further application (16/01066/F) for the mixed use redevelopment of Marketfield Car Park (4365sqm retail, 1487sqm leisure and 153 residential flats) has not yet been started.

The following permissions were completed within the last 12 months adding a net 2936sqm of commercial space to the town centre:

- 14/00837/F - Crown Buildings, 73-75 London Road, erection of a new office building, gain of 5340sqm.

- 14/01331/OUT - Knowles House, 35-48 High Street, proposed change of use of two storeys of existing offices to residential, loss of 2404sqm.

A number of other permissions are under construction; these have the potential to deliver a loss of 827sqm of commercial floorspace:

- 12/01851/F – 43 Station Road: Extension to increase B1(A) by +8sqm
- 14/02551/P3JPA – Rawlinson House, 7-9 London Road: Office to residential permitted development (-407sqm)
- 14/00763/CU – 26-28 Station Road: Change of use office to residential (-428sqm) and residential extension

There are also a number of other permissions which have not yet been started; theses have the potential to deliver a loss of 1155sqm of commercial space:

- 14/02497/CU – 54 Station Road: Change of use SG to A2 (+68sqm)
- 15/02055/CU – Gatton Place, St Matthews Road: Partial change of use B1 to D1 (-791sqm)
- 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)
- 16/00340/PAP - Unit 2 Noble House, Queensway, Conversion of A1 retail unit to provide 1 no. 2 bedroom apartment, (-68sqm)

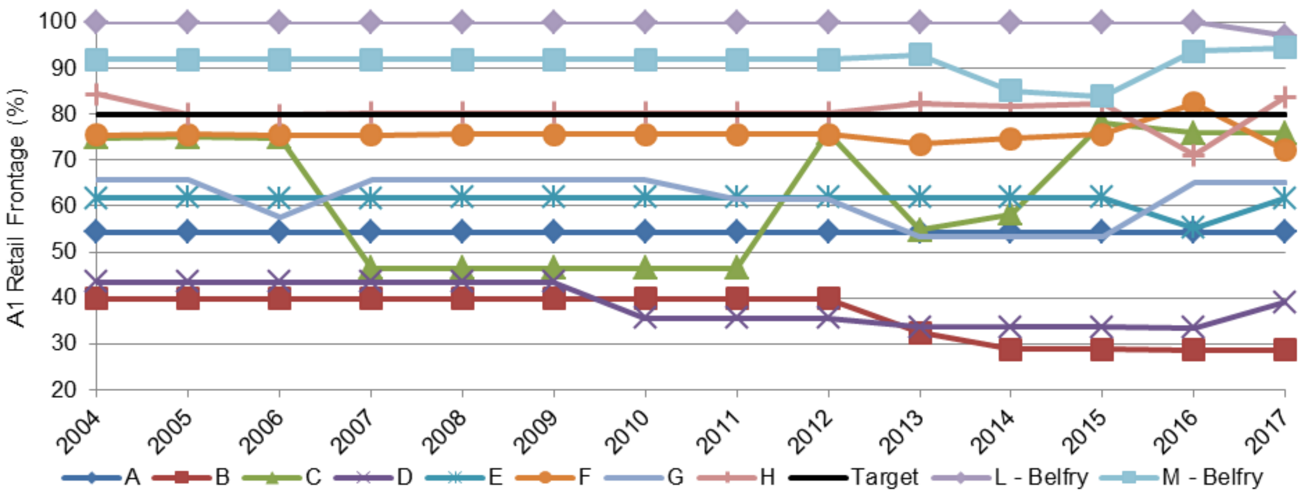
Frontages

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 (97% and 94%) whilst frontage B has the lowest representation (29%).

As has been the case for many years, frontages L and M continue to exceed the 80% primary A1 retail threshold whilst frontage H (83.7%) has returned above the threshold and frontage F has fallen just below (72.1%). The remaining primary frontages continue to fall considerably below the 80% primary A1 retail threshold; in particular frontages B and D 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

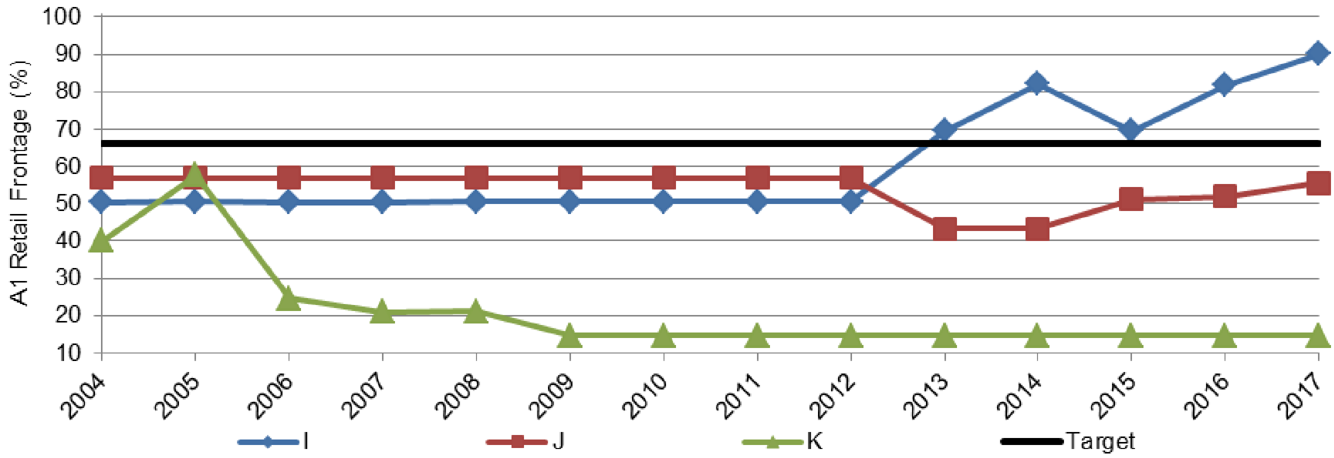


Secondary

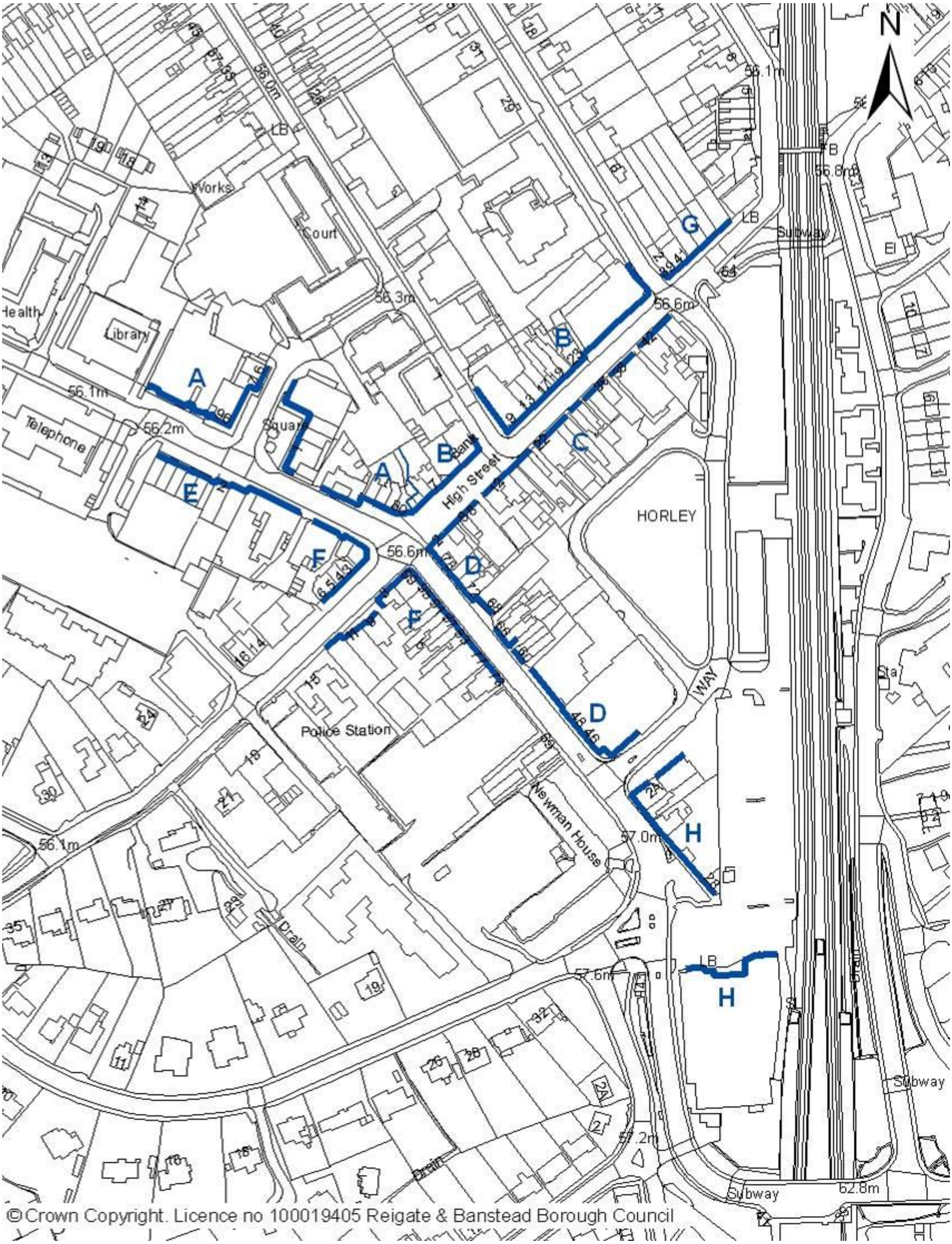
Within the last twelve months the proportion of A1 retail within frontage K has remained unchanged whilst frontage J has seen an increase as Martin and Co has moved into a previously vacant unit. Frontage I has also seen an increase due to further occupiers vacating Cromwell Road.

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%) but this is due to vacating businesses as the site is in the process of being cleared for redevelopment. 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 Plan, retail frontages will be reviewed to ensure they remain relevant and robust.

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 pedestrianised; 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.

Vacancies & New Occupiers

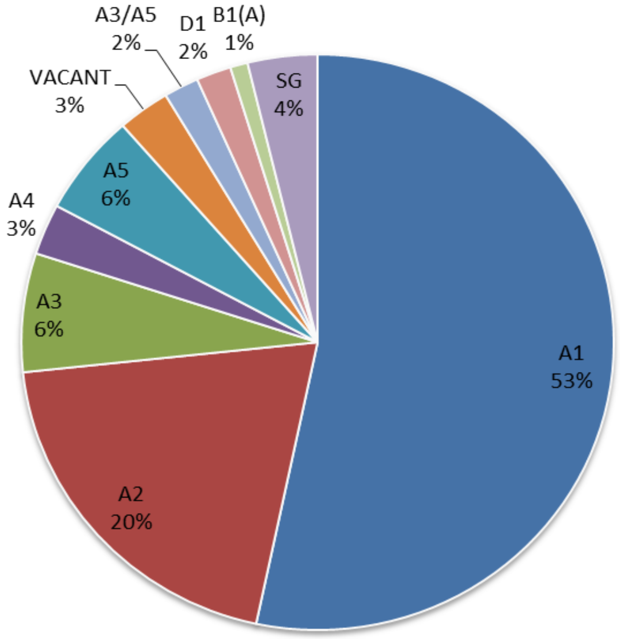
Within the last twelve months there have been a number of occupier changes: 13 new occupiers and 12 have left. The number of vacant units has fallen by 1 (4 to 3), vacant frontage fallen (2.6% to 2.1%).

	Vacancy Rate
% of units	2.9%
% of frontage	2.1%
% of net retail floorspace	2.2%

Vitality

A1 to A5 retail frontage accounts for 90% of the total and over half is in A1 use (53%). Specifically within the last twelve months the proportion of occupied A1 has fallen marginally from 57% to 53%.

Figure 16 Breakdown of Frontage by Use Class



Reflecting its role as a district centre, compared to the other town centres Horley has the 2nd greatest percentage of convenience units (11%) and the second highest percentage of convenience floorspace (36%) (Banstead, the other district centre has the greatest percentage – 39%).

In comparison to the other town centres, Horley continues to have the greatest number of take-aways (7) and charity/ second-hand retailers (9, joint with Banstead). 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 (26%)	5,206 (31%)
Convenience	12 (11%)	6,198 (36%)
Service	39 (37%)	3,203 (19%)
Food & Drink Leisure	20 (19%)	1,922 (11%)
Non-Retail	4 (4%)	225 (1%)
Vacant	3 (3%)	371.9 (2%)
Total	**105**	**17,126**

Developments & Use Class Changes

Within the last twelve months one development has been completed:

- 14/02646/P3JPA – Beulah Court, 15-19 Albert Road: Office to residential permitted development (-1,979sqm)

There are a number of permissions under construction which would lead to a 1,604sqm loss of commercial floorspace:

- 15/00500/F – Land Parcel at 71 Victoria Road: Mixed use redevelopment comprising retail (+187sqm) and residential
- 15/02148/PAP3O – 39-41 High Street & 2 Lumley Road: Office to residential permitted development (-440sqm)
- 14/00317/F – Saxley Court, 121-129 Victoria Road: Change of use office to residential (-1,063sqm)
- 14/02647/P3JPA – Consort House, Consort Way: Office to residential permitted development (-288sqm)

There are also a number of outstanding planning permissions which if delivered would lead to a 2,809sqm loss of commercial floorspace:

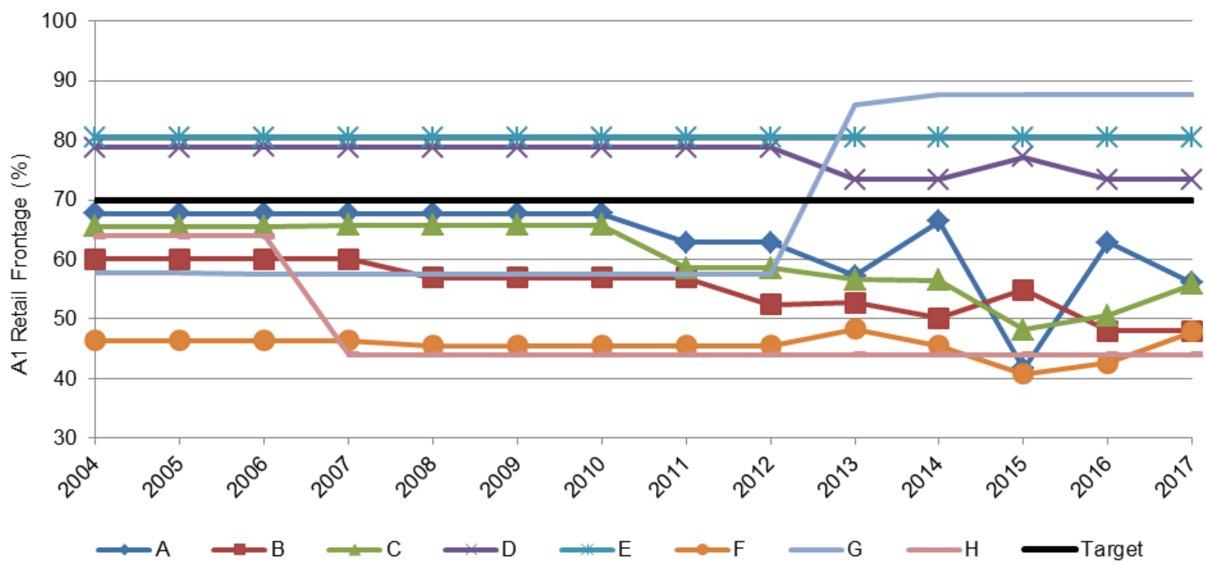
- 13/01912/P3JPA – Imperial Buildings, 68-70 Victoria Road: Office to residential permitted development (-973sqm)
- 14/00913/P3JPA – 80-82 Victoria Road: Office to residential permitted development (-170sqm)
- 15/01275/PAP3O – Dartel House, 2 Lumley Road: Office to residential permitted development (-123sqm)
- 15/00386/CU – 19 High Street: Change of use A1 to A3 (+110sqm)
- 14/02542/F – 1 Yattendon Road: Replacement building and demolition of existing workshop (A1 -2sqm)
- 16/02193/P – 100 Victoria Road: Office to residential permitted development (-82sqm)
- 16/01739/P - 17 Massetts Road: Office to residential permitted development (-1,400sqm)
- 15/00821/P - 88 Brighton Road: Office to residential permitted development (-80sqm)
- 16/00096/PAP – 12-14 High Street: Office to residential permitted development (-89sqm)

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 H has the least (44%) due to a high proportion of 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 sale of goods to the public – shops, post offices, travel agencies and ticket agencies, hairdressers, funeral directors and undertakers, domestic hire shops, dry cleaners, sandwich bars (sandwiches or other cold food purchased and consumed off the premises), internet cafés.	Upper floors as 2 flats C3 (up to 150m2)* A3 (up to 150m2), A2 (including with up to 2 flats), D2 (up to 200m2)*
A2 **(Professional and Financial Services), but excluding betting offices or pay day loan shops**	Banks, building societies and bureaux de change Professional services (other than health or medical services) – estate agents and employment agencies	A1 (if ground floor is a display window), Upper floors as 2 flats C3 (up to 150m2)* A3 (up to 150m2)* D2 (up to 200m2)*
A3 **(Restaurants and Cafes)**	Use for the sale of food for consumption on the premises. Excludes internet cafés	A1 or A2
A4 **(Drinking Establishments)**	Use as a public house, wine bar or other drinking establishment	A1, A2 or A3
A5 **(Hot Food Takeaways)**	Use for the sale of hot food for consumption off the premises	
B1 **(Business)**	(a) Use as an office other than a use within Class A2 (financial and professional services).	B8 (up to 500m2) C3 from B1(a) Office Use,* State Funded School or Nursery*
	(b) Use for research and development, studios, laboratories, high technology.	B8 (up to 500m2)
	(c) Use for any industrial process that can be carried out in a residential area without detriment to amenity.	B8 (up to 500m2)
B2 **(General Industrial)**	Use for the carrying on of an industrial process other than one falling in B1(C) above.	B1 B8 (up to 500m2)
B8 **(Storage and Distribution)**	Wholesale warehouses, distribution centres and repositories	B1 (up to 500m2) C3 (up to 500m2)*
C1 **(Hotel)**	Hotels, boarding houses and guest houses	State-funded school or registered nursery, subject to prior approval by local planning authority
C2 **(Residential Institutions)**	Hospitals, nursing homes, residential education and training centres. Use for the provision of residential accommodation and care to people in need of care.	State-funded school or registered nursery, subject to prior approval by local planning authority
C3 **(Dwellinghouses)**	Use as a dwelling house, whether or not as a sole or main residence.	C4
C4 **(Houses in Multiple**	Small shared dwelling houses occupied by between three and six unrelated individuals, as their only or main residence, who share basic amenities such as a	C3

Occupation)	kitchen or bathroom.	
D1 **(Non-Residential Institutions)**	Clinics and health centres, crèches, day nurseries, day centres and consulting rooms (not attached to the consultant's or doctor's house), museums, public libraries, art galleries, exhibition halls, non-residential education and training centres, places of worship, religious instruction and church halls.	State Funded School* Permitted change to A1, A2, A3 or B1 of up to 150m2 of a building for a single period of up two years, subject to prior notification of local planning authority
D2 **(Assembly and Leisure)**	Cinemas, dance and concert halls, sports halls, swimming baths, skating rinks, gymnasiums, bingo halls, other indoor and outdoor sports and leisure uses (not involving motorised vehicles or firearms)	State-funded school or registered nursery, subject to prior approval by local planning authority Permitted change to A1, A2, A3 or B1 of up to150m2 of a building for a single period of up two years, subject to prior notification of local planning authority
Sui Generis** **(Casinos and Amusement Arcades/Centres)**	Sui generis uses are their own specific use and planning permission is normally required for any change of use. However the following changes are permitted for the specified uses.	Casino to: A3 (up to 150m2)* C3 (up to 150m2)* D2* Amusement arcade to: C3 (up to 150m2)*
Sui Generis** **(Betting Offices and Pay Day Loan Shops)**		A1 if ground floor is a display window A2 including up to 2 flats A3 (up to 150m2) C3 (up to 150m2)* D2 (up to 200m2)
Sui Generis** **(Agricultural Buildings)**		A1, A2, A3, B1, B8, C1, C3, D2*

*subject to prior approval by the local planning authority.
**Whilst the most commonly found uses are contained within the 1987 Use Classes Order (as amended), there are many uses that are not specifically categorized by the four main use classes. These are classified as sui generis. Some of the sui generis uses are listed but they are not intended to be exhaustive. Sui generis uses are their own specific use and planning permission is normally required for any change of use

The Town and Country Planning (General Permitted Development) (England) Order 2015 permits a number of potential changes of use without requiring planning permission, as detailed above. Some changes of use are subject to a prior approval procedure with the local planning authority. This seeks approval of various matters, dependent on the nature of the use, but might typically include matters relating to parking and highways, flooding, and contaminated land. Further details on permitted development rights and changes of use can be found on the planning portal https://www.planningportal.co.uk/info/200125/do_you_need_permission

Full occupier schedules for each of the town centre 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