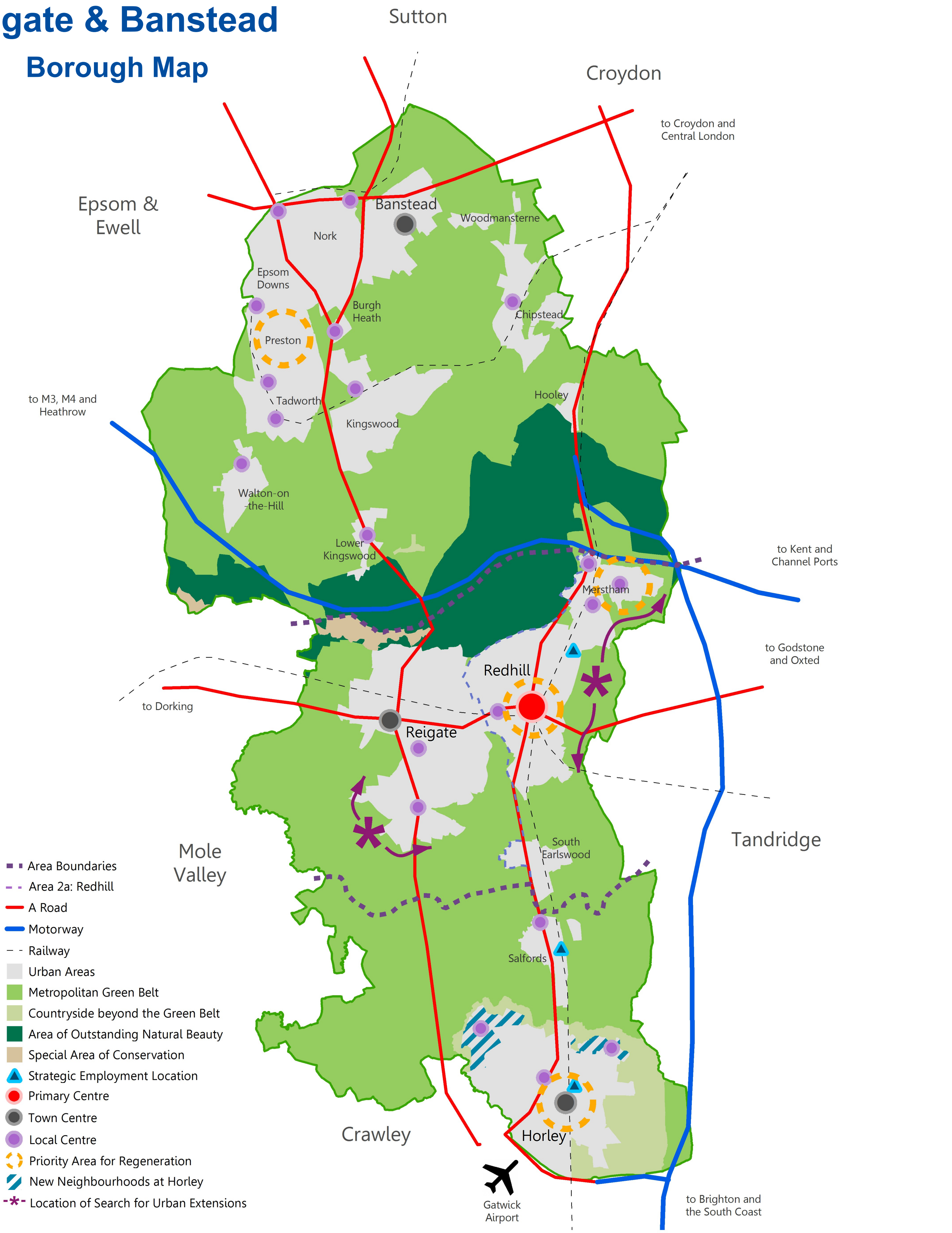
Town Centre Monitor

2019

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

Reigate & Banstead

Borough Map



Town Centre Monitor

2019

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 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 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, the use of upper floors and elsewhere within the boundary of the town centre also makes a valuable contribution to the functioning and vitality of the town centres. Full schedules of the occupiers within the retail frontage for each centre 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 and reviewed in accordance with Regulation 10A of the Town & Country Planning (Local Planning) (England) Regulations 2012 (as amended); it details how much growth will take place until 2027 and sets out the overarching strategic approach for delivering new homes and development in the borough. The emerging Development Management Plan (due to be adopted September 2019) will contain detailed policies relating to the management of development within the town centres and allocate sites for development across the borough. In the interim, this monitor will continue to assess performance against saved policies Sh1, Sh7 & Sh8 in the Local Plan 2005.

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:

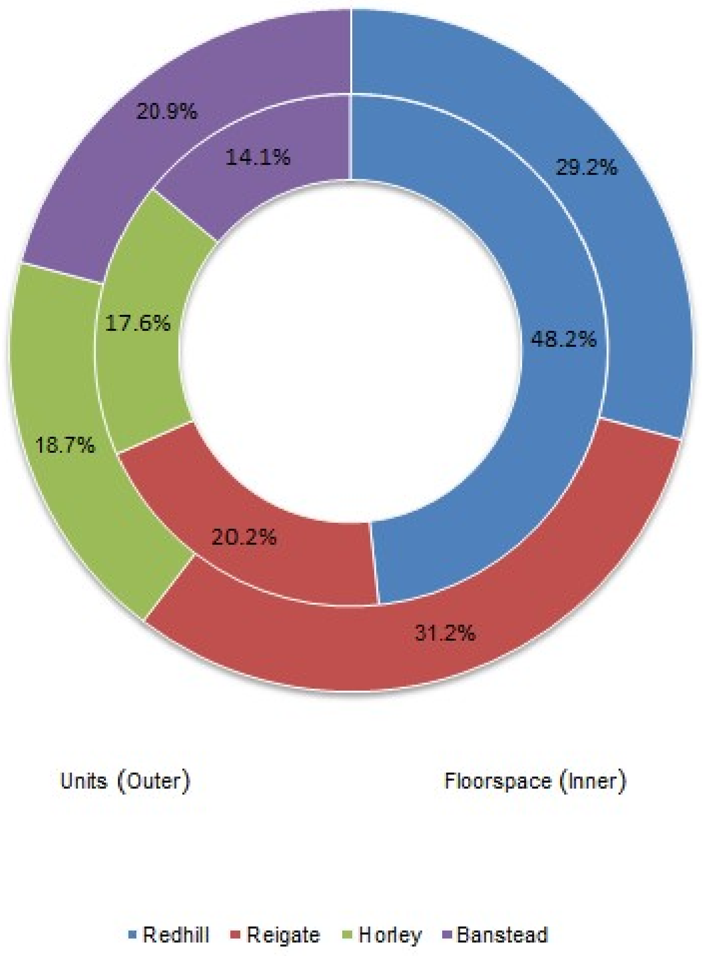
- **Redhill -** is the primary town centre and the focus of future leisure, office and comparison retail growth due to its strong transport links and role as a Regional Hub
- **Reigate -** is the secondary town centre, serving as a convenience destination with a strong range of independent and specialist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

When combined the borough's town centres provide 561 units, 97,573sqm of retail floorspace and 5,286m of retail frontage.

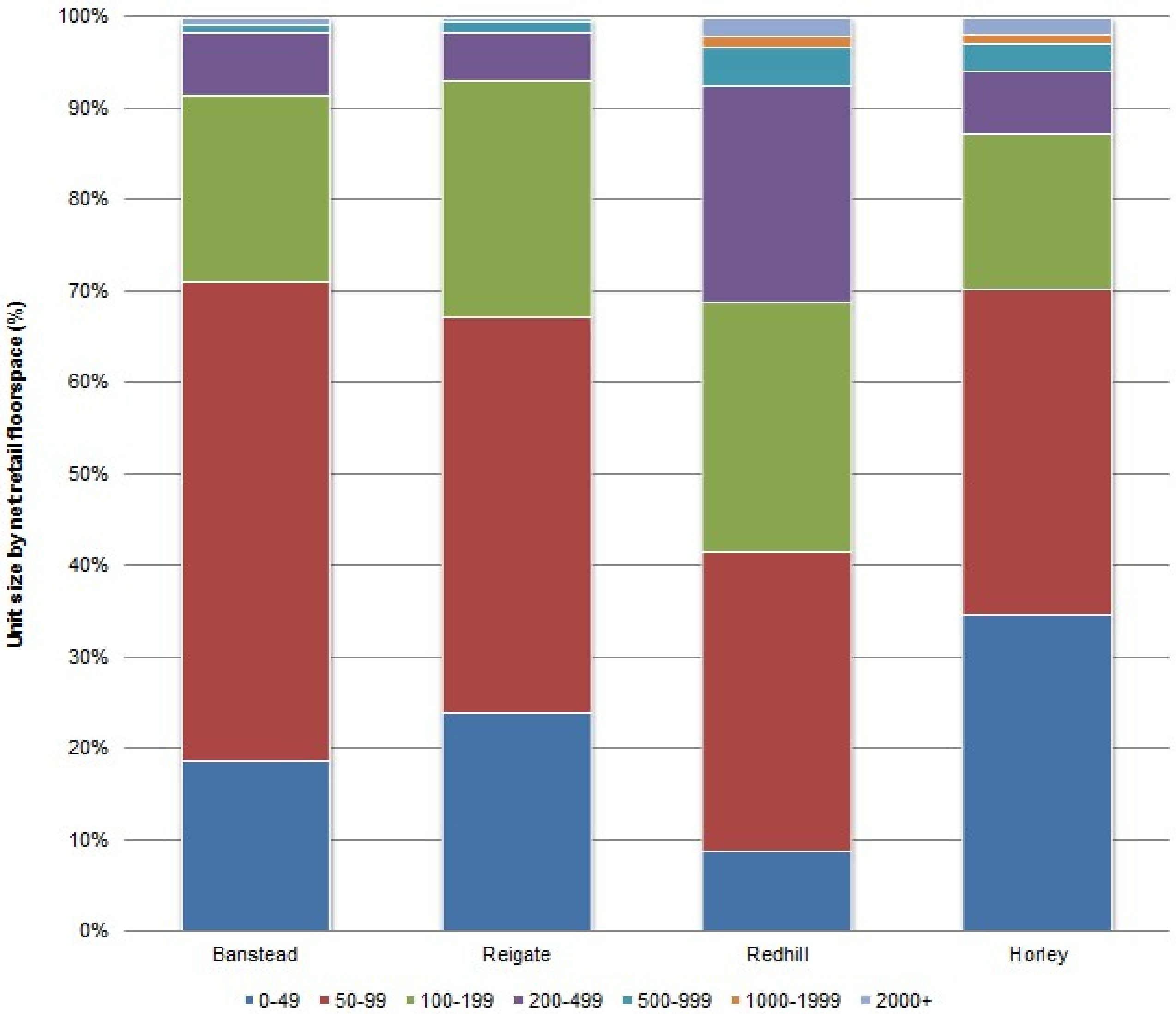
As can be seen in Figure 1, almost half (48.2%) of the floorspace is in Redhill, highlighting its position as the borough's primary town. Reigate has 20.2% followed by Horley (17.6%). Banstead is the borough's smallest town centre accounting for 14.1% of the total retail floorspace. Just over 30% of the units are located in Reigate with a similar proportion in Redhill. 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



As can be seen in Figure 2, Redhill has the greatest percentage of retail units of 100sqm or larger (58.5%) whilst Banstead, Horley and Reigate have greater proportions under 100sqm (70.9%, 70.3% and 67.3%). This reflects the different roles of the town centres.

Figure 2 Breakdown of Town centre Units by Net Retail Floorspace (sqm)



Overall Trends – Key Messages

National Retail Trends

According to Price Waterhouse Coopers, 2018 has seen a record number of store closures. On average, 16 stores closed in the UK every day, compared to only 9 new store openings, resulting in the total net 2,481 stores disappearing from Britain's top 500 high streets in 2018; a 40% increase on the previous year. (Price Waterhouse Coopers - Store openings and closures 2018)

The Retail and Leisure Market Analysis 2018, published by the Local Data Company (LDC), describes 2018 as one of the toughest periods in recent years for retailers. Banks have seen the greatest decline with a net loss of 716 units, pushing pubs to a second place with a net loss of 636 units. Estate agents have been experiencing one of the biggest turnarounds, featuring as one of the top 20 fastest growing in 2014, now falling to a 3rd fasted declining category. On the other side of the spectrum, barbers continued their sharp growth with a net increase of 813 units in 2018, with beauty salons also performing strongly, accounting for a net 495 new openings.

According to LDC, in 2018 the number of occupied units declined at a faster rate in every retail location than in 2017, with shopping centres showing the biggest net decline. The high street saw less significant decline, with the vacancy rate rising only by 0.3% from 11.2% to 11.5% in 2018.

Borough Key Messages

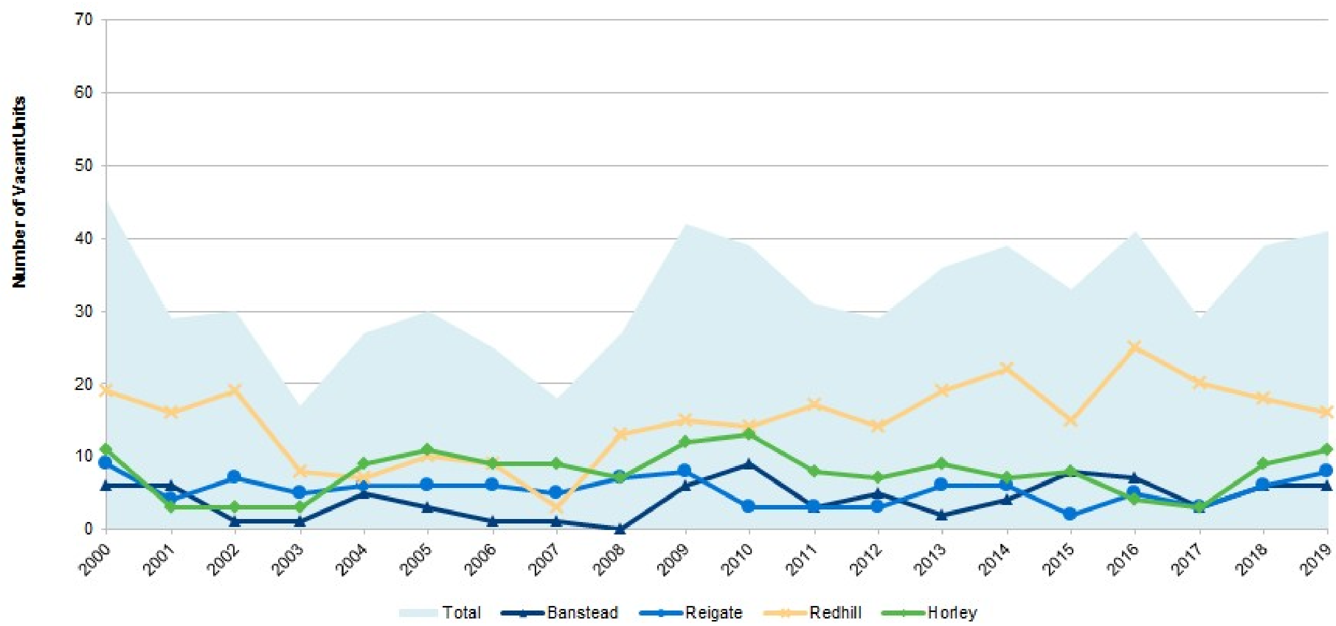
- **Vitality:** A1 remains the dominant use within the borough's town centres; within the past twelve months there has been a marginal increase in the proportion of A1-A5 units (96.1% to 96.6%) within which the proportion of A1 units has increased slightly (66.7% to 67.2%).
- **Retail Uses:** Comparison retail occupies 35.7% of all units within the borough's town centres. Over a third of these units are clothing, footwear & accessories premises (34.5%) and almost half of these are located in Reigate (44.9%). Services occupy a further 30.5% of the total units within the borough of which more than a quarter are hair & beauty premises (26.9%).
- **Retail Composition:** The composition of each of the town centres suggests that they are well matched to fulfil their individual role within the hierarchy, with Redhill and Reigate both having higher proportion of comparison retail. Banstead has higher proportions of convenience retail, whilst Horley offers more even split between the two.
- **Vacancy Rate:** Vacancy rate has risen (6.9% to 7.3%) due to an increase in the number of vacant units (39 to 41). The borough's vacancy rate falls significantly below the national average of 12.5%. In this monitoring period, Redhill has experienced a fall in the vacancy rate (10.6% to 9.8%); Banstead remained unchanged at 5.1%, whilst the other two areas saw an increase: Reigate (3.4% to 4.6%) and Horley (8.6% to 10.5%).
- **New Occupiers:** 38 new occupiers have moved into the four town centres within the past year: Reigate and Redhill saw the greatest increase (12 each), whilst Horley and Banstead both had 7 new occupiers moving in.
- **Planning Permissions:** There are currently 34 outstanding planning permissions within the town centres, which have the potential to deliver a net loss of 1,287sqm of commercial and leisure floorspace. Of these planning permissions 14 are under construction (-2,980sqm) and a further 20 have not yet started (+1,693sqm).

Vacancies & New Occupiers

Vacancy Trend

As shown in Figure 3, within this monitoring period, the number of vacant units has increased (39 to 41): Redhill was the only town which recorded a fall (18 to 16), Banstead remained unchanged with 6 units and Reigate and Horley saw increases (6 to 8 and 9 to 11 respectively).

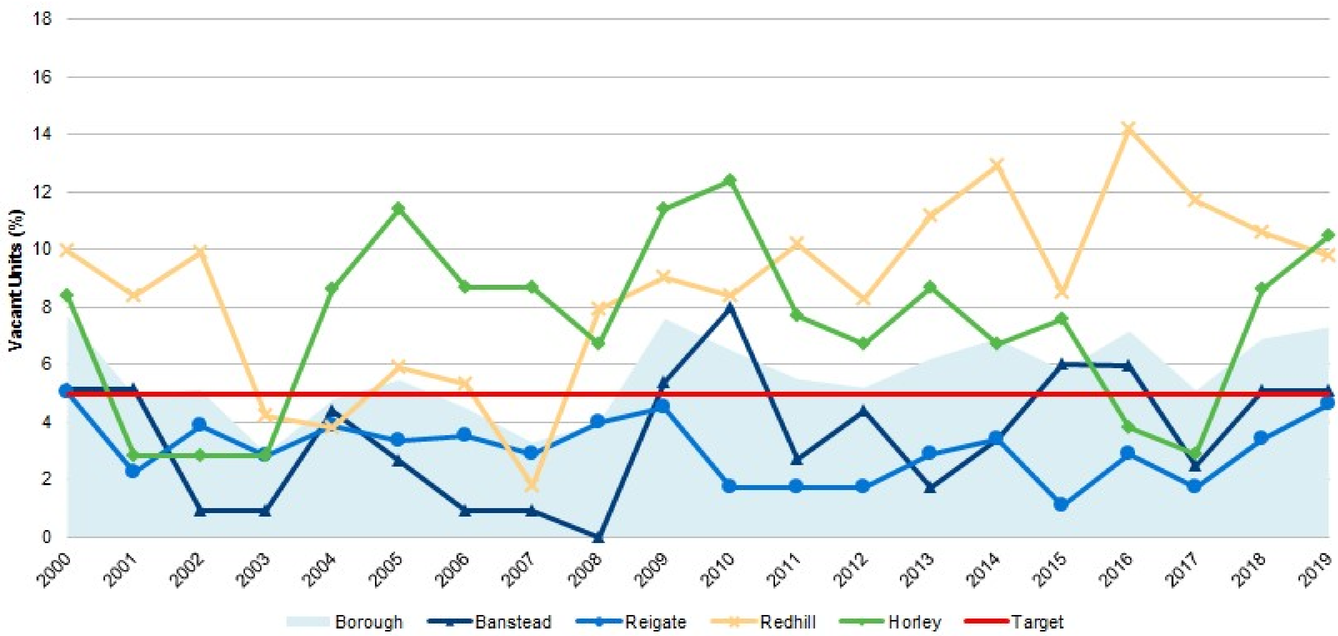
Figure 3 Number of Vacant Units (2000-2019)



Within the monitoring period, the borough's vacancy rate has risen from 6.9% to 7.3%.

As described in Figure 4, the borough has a vacancy target of 5%: the only town scoring below this target is Reigate with 4.6% whilst Banstead remains just above the target with 5.1%. Despite having a significant proportion of vacant units, Redhill was the only town to see a fall in its vacancy rate within this monitoring period (from 10.6% to 9.8%). Consequently for the first time since 2010, Horley has surpassed Redhill as having the highest vacancy rate.

Figure 4 Percentage Vacancy Rate (2000-2019)



Vacant frontage is also an important consideration as vacant units with large frontages will have a disproportionate visual impact. Table 1 shows that within the last twelve months vacant frontage increased from 5.8% to 6.7%. Vacant floorspace also increased from 4.6% to 4.9%.

Table 1 Summary of Current Vacancy Position

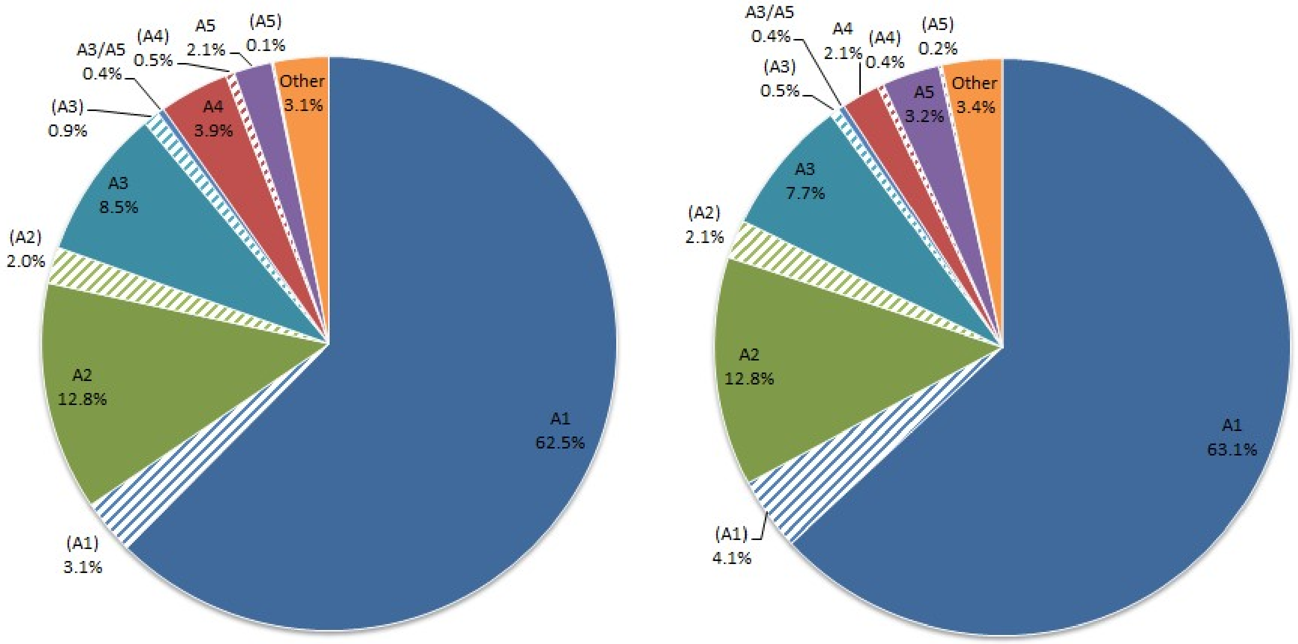
	Vacant	Vacancy Rate
Units/Premises (No.)	41	7.3%
Frontage (Metres)	353	6.7%
Floorspace (Sqm)	4,761	4.9%

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.

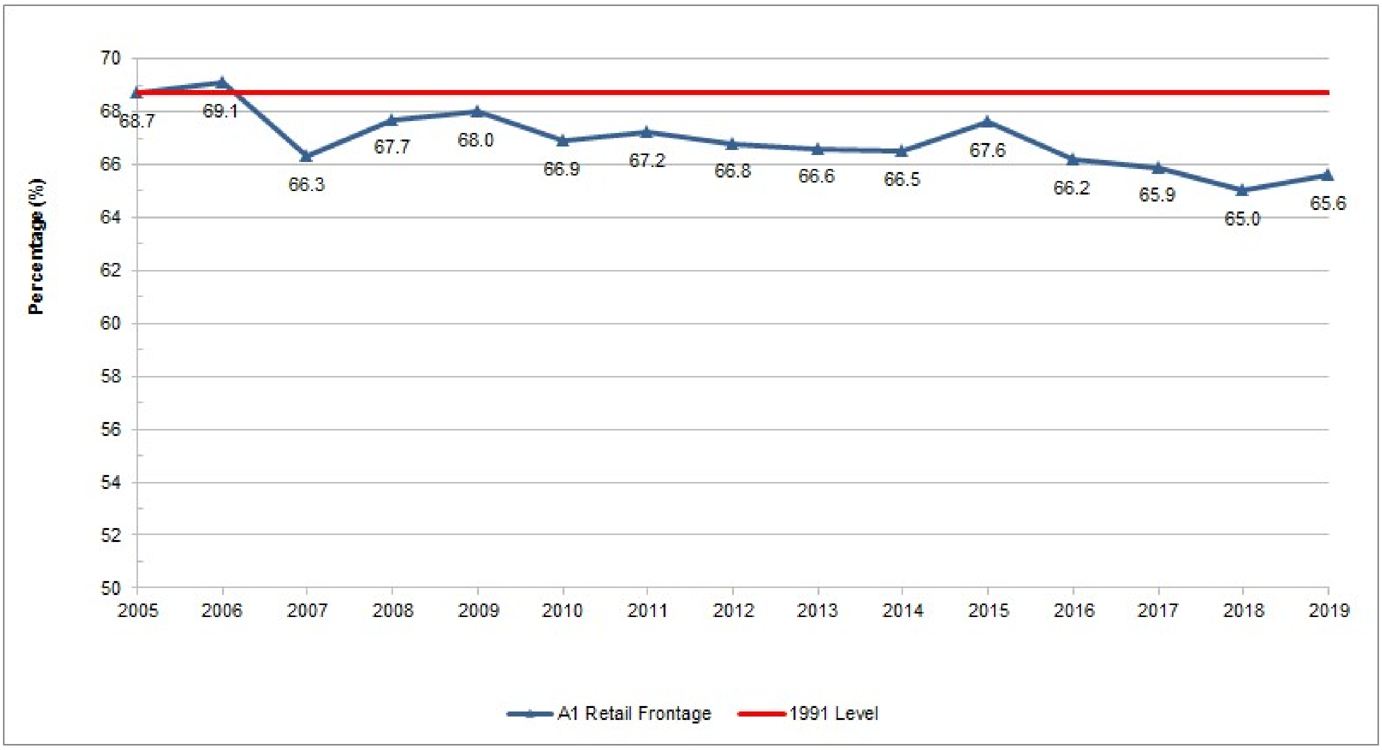
As seen in Figure 5, the majority of units across the town centres fall within A1 to A5 use (96.6%) of which 67.2% are A1 (this compares to 96.1% and 66.7% previously)

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 65.6% of the total frontage, a minor improvement on previous year (65.0%) - see Figure 6.

Figure 6 A1 Retail in Town Centre Units (2005 – 2019)



Retail Offer

It is useful to analyse 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. Service retail units saw their share in the borough fall by 1%; all other retail offers have performed consistently in-line with the previous monitoring period.

Table 2 shows that convenience retail continues to account for the lowest percentage of retail units (8.7%) but makes up nearly a third of the floorspace (32.3%); this is largely due to the dominance of larger format supermarkets such as Waitrose in Horley, Sainsbury's in Redhill and Morrisons in Reigate.

Services continue to make up the second highest percentage of units (30.5%) however they only take up 13.4% of the retail floorspace, suggesting that they tend to occupy smaller units.

Table 2 Breakdown of Retail Offer

	Units	Floorspace(sqm)
Comparison	200 (35.7%)	37,372 (38.3%)
Convenience	49 (8.7%)	31,469 (32.3%)
Service	171 (30.5%)	13,062 (13.4%)
Food & Drink Leisure	86 (15.3%)	10,173 (10.4%)
Non-Retail	14 (2.5%)	736 (0.8%)
Vacant	41 (7.3%)	4,761(4.9%)
Total	**561**	**97,573**

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 (46.4%), similarly in Reigate (34.7%). Convenience occupies the greatest percentage in Banstead (37.9%), whilst Horley shows a more even split between the two (33.7% comparison and 31.7% convenience).

Figure 7 Retail Offer by Centre

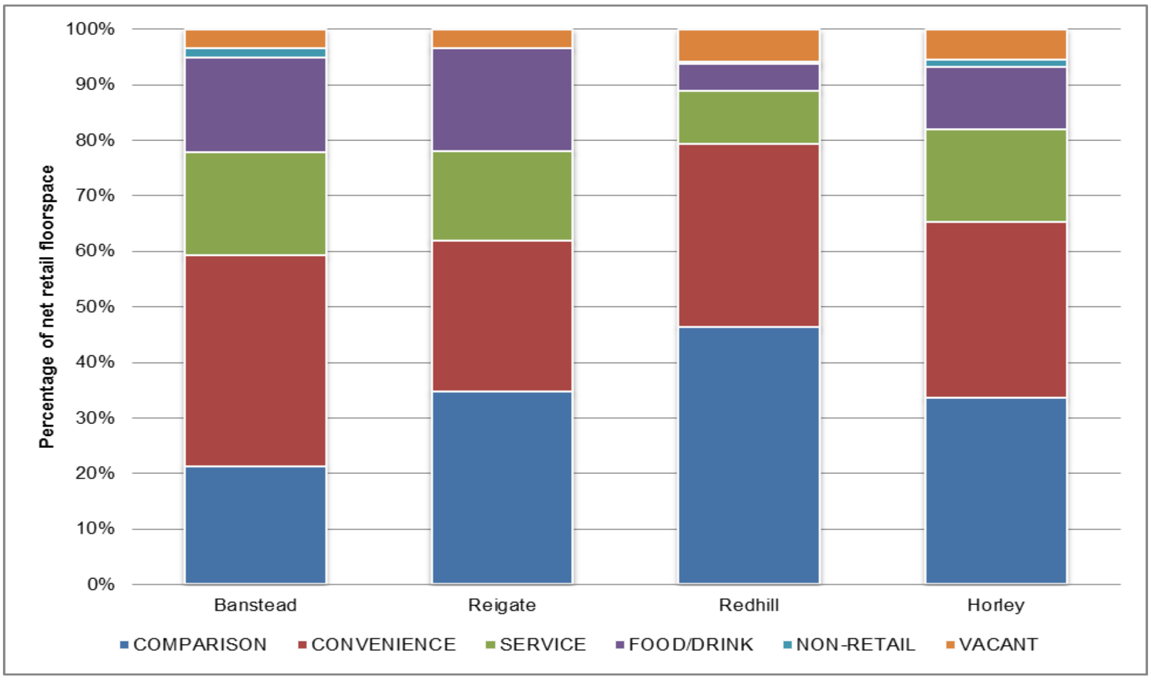
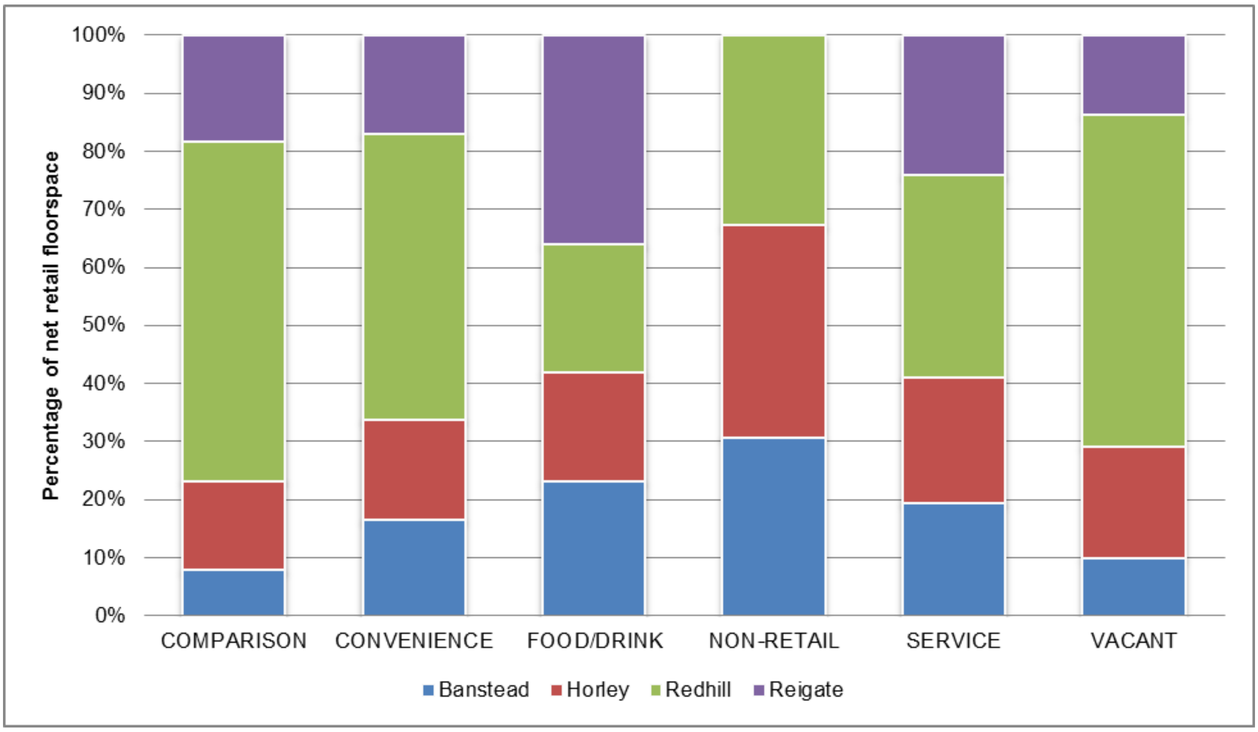


Figure 8 below details the retail offer within the town centres, it shows that Redhill has the greatest percentage of net retail floorspace for all the retail categories apart from food & drink leisure for which Reigate has the greatest proportion (36.0%).

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 (35.7%) followed by services (30.5%). Food & drink leisure occupies a further 15.3%.

Table 3 shows that almost two-thirds (64.5%) of comparison retail is clothing, footwear & accessories (34.5%), home & DIY (14.5%) and charity / second-hand (15.5%). Noteworthy, almost half (44.9%) of the clothing, footwear & accessories providers are located in Reigate.

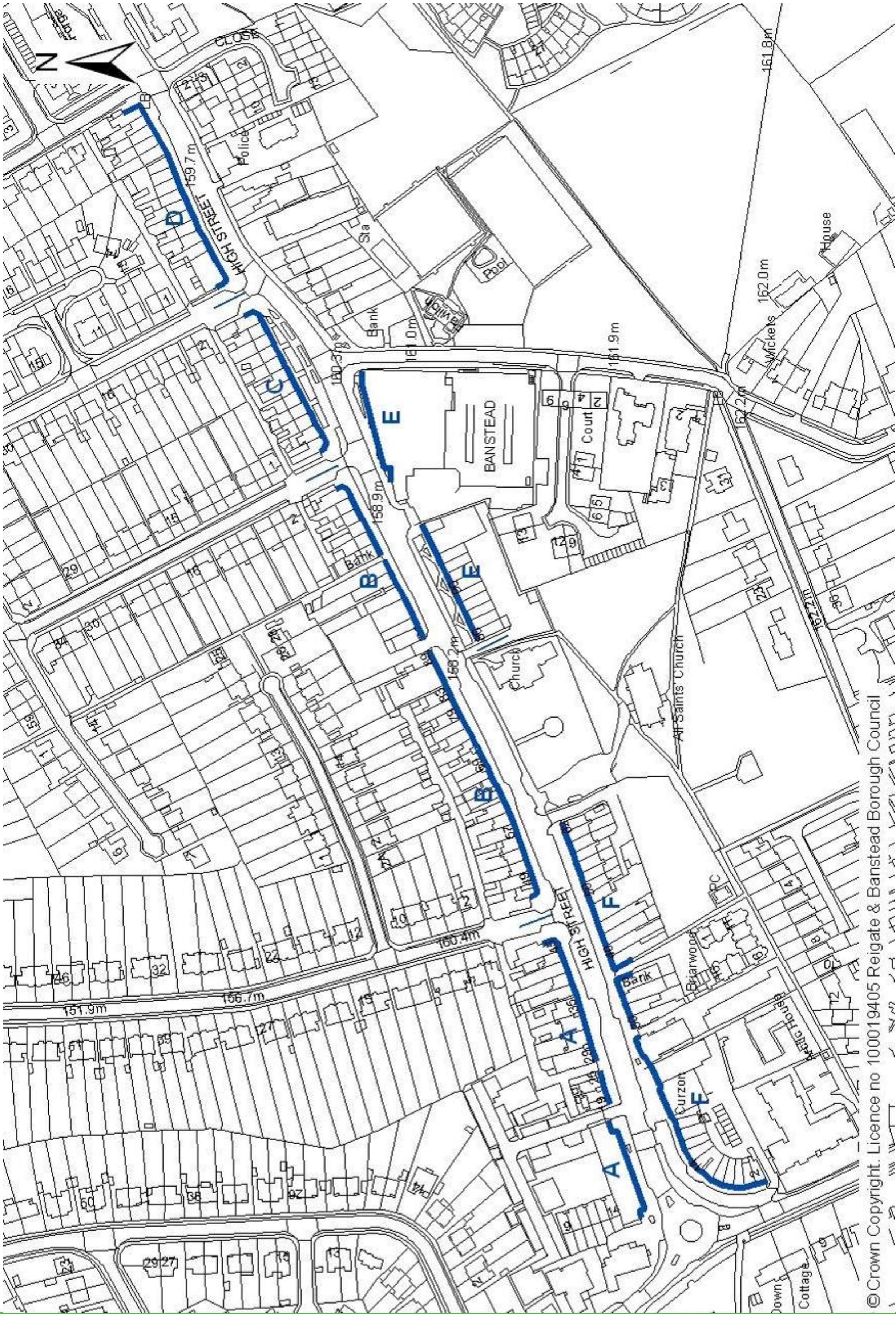
Together hair & beauty providers and estate agents occupy almost half (49.7%) of the service units within the borough (26.9% and 22.8% respectively). Both the number of hair & beauty providers and the number of estate agents are relatively evenly spread across the borough's four town centres, with Reigate leading in both categories with 33% and 31% respectively.

Nearly two-thirds of the food & drink establishments within the borough are restaurants (34.9%) or café/sandwich bars (30.2%). Reigate has the greatest number of both (13 and 8); Redhill has the fewest restaurants (3) and Banstead has the fewest café/sandwich bars (5).

Table 3 Detailed Breakdown of Retail Categories (Units)

Comparison	Banstead	Reigate	Redhill	Horley	TOTAL
Clothing, Footwear & Accessories	11	31	20	7	69
Bookshops & Stationers	1	5	5	0	11
Home & DIY	10	11	3	5	29
Electronics & Technology	1	3	7	0	11
Charity/Second-Hand	8	6	8	9	31
Toys, Games & Sports	0	3	2	0	5
Other Comparison Retail (e.g. Gifts, Florists)	5	16	19	4	44
Total Comparison	**36 (30.8%)**	**75 (42.9%)**	**64 (39.0%)**	**25 (23.8%)**	**200 (35.7%)**
Convenience					
Food/Supermarket	9	6	5	5	28
Newsagents	1	2	2	3	8
Chemist/Pharmacy	4	2	4	3	13
Total Convenience	**14 (12.0%)**	**10 (5.7%)**	**14 (8.5%)**	**11 (10.5%)**	**49 (8.7%)**
Service					
Travel Agents	1	1	2	0	4
Hair & Beauty	13	15	10	8	46
Opticians	6	5	5	1	17
Banking	3	5	11	3	22
Estate Agents	7	12	10	10	39
Bookmakers	2	1	4	2	9
Dry Cleaning	2	3	2	3	10
Other Services (e.g. Employment, Repairs)	6	6	6	6	24
Total Service	**40 (34.2%)**	**48 (27.4%)**	**50 (30.5%)**	**33 (31.4%)**	**171 (30.5%)**
Food & Drink Establishments					
Restaurant	9	13	3	5	30
Take-away	6	4	1	6	17
Café/Sandwich Bar	5	8	7	6	26
Pub/Club	0	7	3	3	13
Total Food & Drink Establishments	**20 (17.1%)**	**32 (18.3%)**	**14 (8.5%)**	**20 (19.0%)**	**86 (15.3%)**
Non A Class	1 (0.9%)	2 (1.1%)	6 (3.7%)	5 (4.8%)	14 (2.5%)
Vacant	6 (5.1%)	8 (4.6%)	16 (9.8%)	11 (10.5%)	41 (7.3%)
TOTAL	**117**	**175**	**164**	**105**	**561**

Banstead Village



Commentary

Banstead Village is an attractive town 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

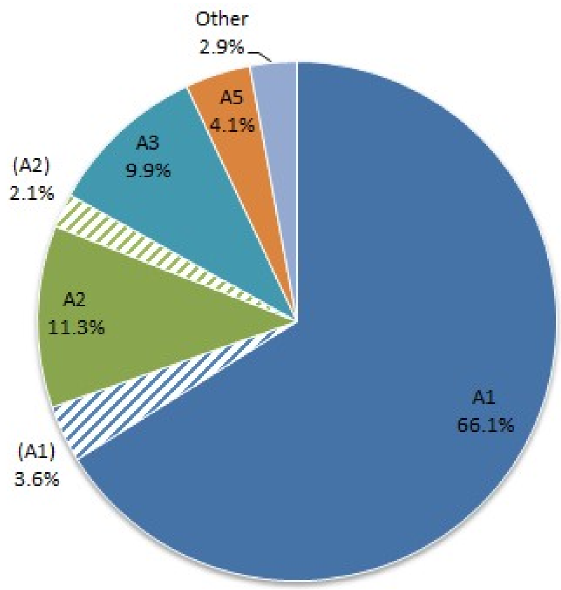
There have been a number of occupier changes: 7 new occupiers have moved into the town centre and 7 have left. This meant a number of vacant premises have remained unchanged, currently standing at 6, and correspondingly the percentage of vacant units remains at 5.1%.

	Vacancy Rate
% of units	5.1%
% of frontage	5.7%
% of net retail floorspace	3.5%

Vitality

Figure 9 shows that primary retail uses (A1-A5) dominate Banstead's retail frontage, accounting for 97.1% of the total frontage. Specifically occupied A1 retail makes up 66.1% of the retail frontage.

Figure 9 Breakdown of Use Classes (Frontage)



As seen in Table 4, services occupy the greatest number of units (34.2%), followed by comparison (30.8%) and food & drink (17.1%). Convenience occupies more than a third of retail floorspace (37.9%), followed by comparison (21.3%) and services (18.6%). Convenience 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	36 (30.8%)	2,927 (21.3%)
Convenience	14 (12.0%)	5,198 (37.9%)
Service	40 (34.2%)	2,555 (18.6%)
Food & Drink Leisure	20 (17.1%)	2,348 (17.1%)
Non-Retail	1 (0.9%)	210 (1.5%)
Vacant	6 (5.1%)	475 (3.5%)
Total	**117**	**13,712**

Development & Use Class Changes

Within this monitoring period, one planning application was completed within Banstead town centre, resulting in a net increase of 98sqm of commercial floorspace.

- 17/00999/F – 113 - 115 High Street, single storey rear extension to increase A1 floorspace by 98sqm

Three planning permissions are under construction; having the potential to deliver net 56sqm of commercial floorspace:

- 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.
- 17/02248/PAP3C – Oscars 59 High Street, change of use from A1 to A3 restaurant
- 18/02681/CU – 113 – 115 High Street, change of use from A1 to D1 orthodontist

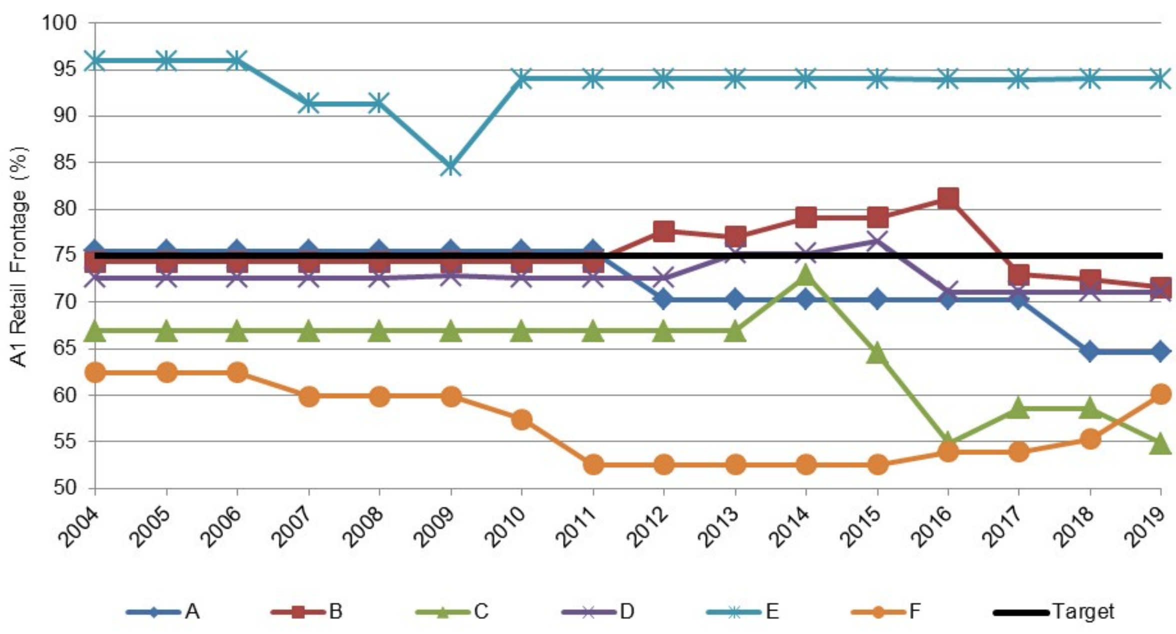
There are two outstanding planning permission; if delivered these will increase commercial floorspace by 11sqm:

- 18/01984/F – 41 High Street, single storey rear extension to increase A1 floorspace by 11sqm
- 18/00812/F – 32 High Street, change of use from A2 to A1

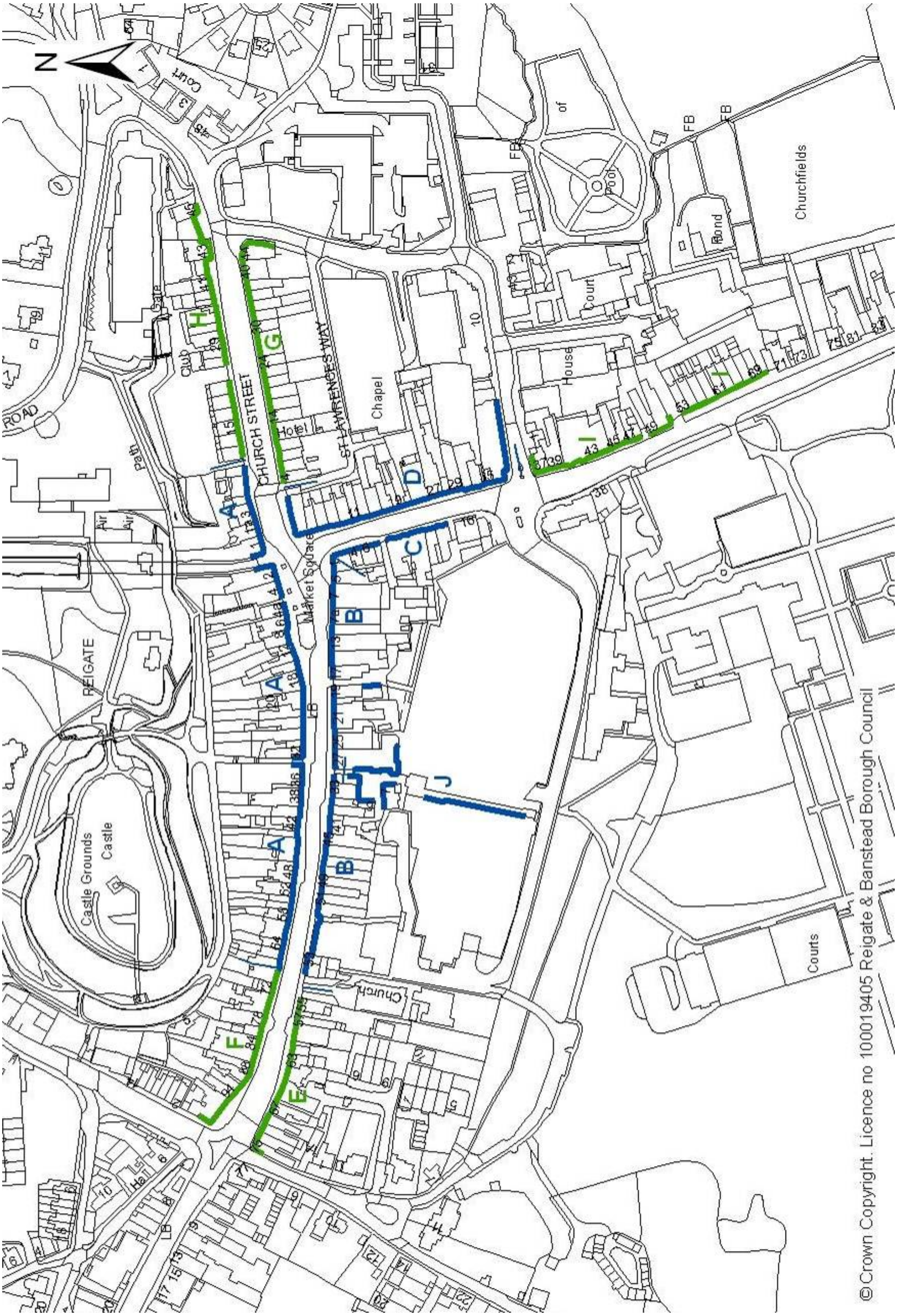
Frontages

Figure 10 shows, that Banstead continues to have a strong A1 retail frontage. Frontage E continues to exceed the 75% threshold requirement at 94.0%, whilst frontages B and D continue to hover just below 75% (at 71.6% & 71.1% respectively). Frontages C and F meanwhile continue to fall consistently below the A1 requirement (54.8% & 60.1% respectively); frontage F due to having a number of large fronted A2 and A3 units and frontage C just due to a sheer number of units in other uses.

Figure 10 Banstead Frontage A1 Retail Trend



Reigate Town Centre



Commentary

Reigate town centre is an historic market town centre, 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 (6 to 8), and corresponding increase in both vacant frontage (2.7% to 3.9%) and vacant floorspace (2.1% to 3.3%).

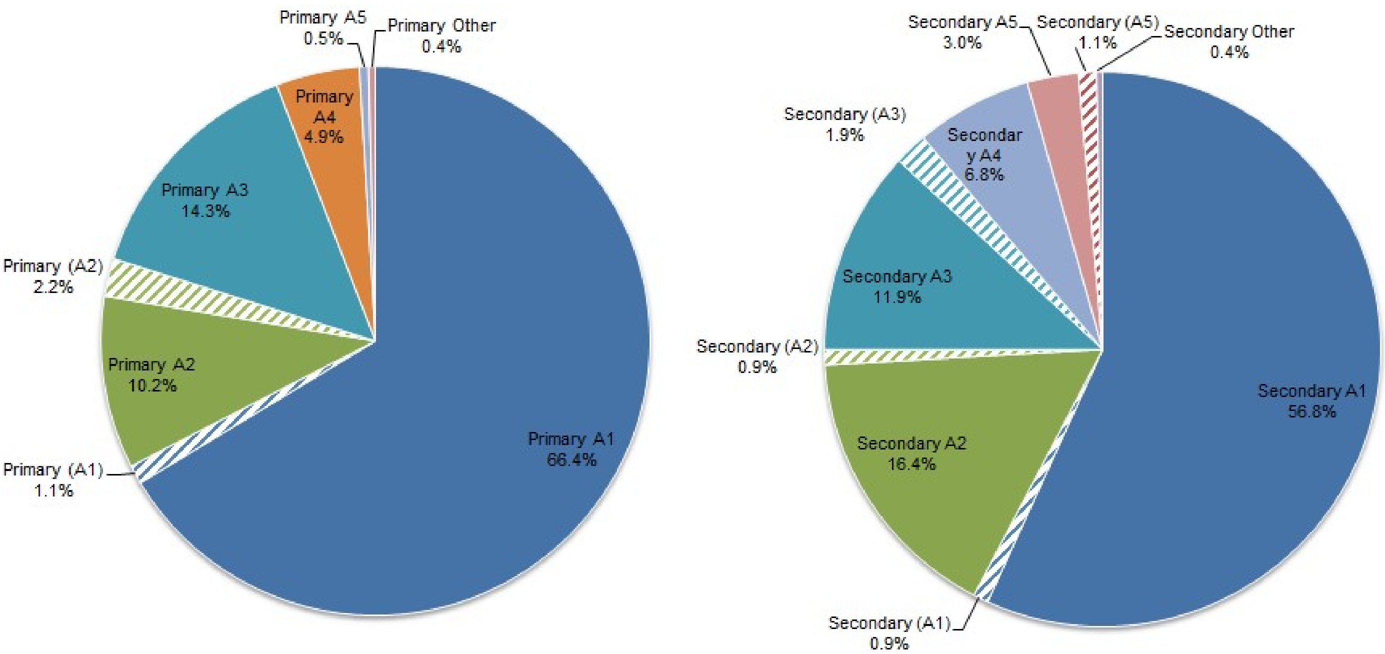
12 new occupiers have moved into the town centre within this monitoring period, 14 have left and 1 has moved into different premises.

	Vacancy Rate
% of units	4.6%
% of frontage	3.9%
% of net retail floorspace	3.3%

Vitality

As seen in Figure 11, Reigate continues to have the highest proportion of frontage of all four town centres falling within A1 to A5 use classes (99.6% in both primary and secondary frontages). Specifically, occupied A1 frontage represents 66.4% of primary and 56.8% of secondary frontage.

Figure 11 Breakdown of Frontage by Use (Primary – Left; Secondary – Right)



Reigate has the highest proportion of food & drink leisure floorspace within the borough (18.6%). The majority of units are located within the town's secondary retail frontage and many are of high quality, adding to the vitality and active evening environment.

As seen in Table 5, the centre continues to have the highest percentage of comparison units of any town centre in the borough (42.9%). 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 (27.4%) including estate agents and hair & beauty salons.

Table 5 Retail Offer

	Units	Net Floorspace (sqm)
Comparison	75 (42.9%)	6,829 (34.7%)
Convenience	10 (5.7%)	5,378 (27.3%)
Service	48 (27.4%)	3,163 (16.1%)
Food & Drink Leisure	32 (18.3%)	3,666 (18.6%)
Non-Retail	2 (1.1%)	0 (0.0%)
Vacant	8 (4.6%)	653 (3.3%)
	175	**19,689**

Development & Use Class Changes

Within the last twelve months there have been no completions within the Reigate town centre shopping frontage; however there are several permissions not yet started. These have the potential to deliver 467sqm of additional street level commercial floorspace as well as a loss of 287sqm of commercial floorspace on the upper floors.

- 16/00428/F – 4-10 Church Street: Extension of commercial space and addition of residential dwellings, gain 292sqm (A2), gain 54sqm (A5)
- 16/02370/F – 61A High Street: Extension of commercial space, gain 121sqm (A1)
- 18/00711/CU – House of Building, 3 – 5 Church Street: Change of use on the first floor from shop (A1) to café (A3) – 53sqm
- 16/02497/PAP – 2 Church Street: Office to residential permitted development on first and second floors, loss 167sqm (B1(A))
- 16/02498/PAP – 3A-7A Bell Street: Office to residential permitted development on first floor, loss 120sqm (B1(A))

There are also several outstanding permissions that are located outside of the current designated retail area but still within the town centre. The properties at 73 & 77-83 Bell Street will be included within the retail area under the emerging DMP:

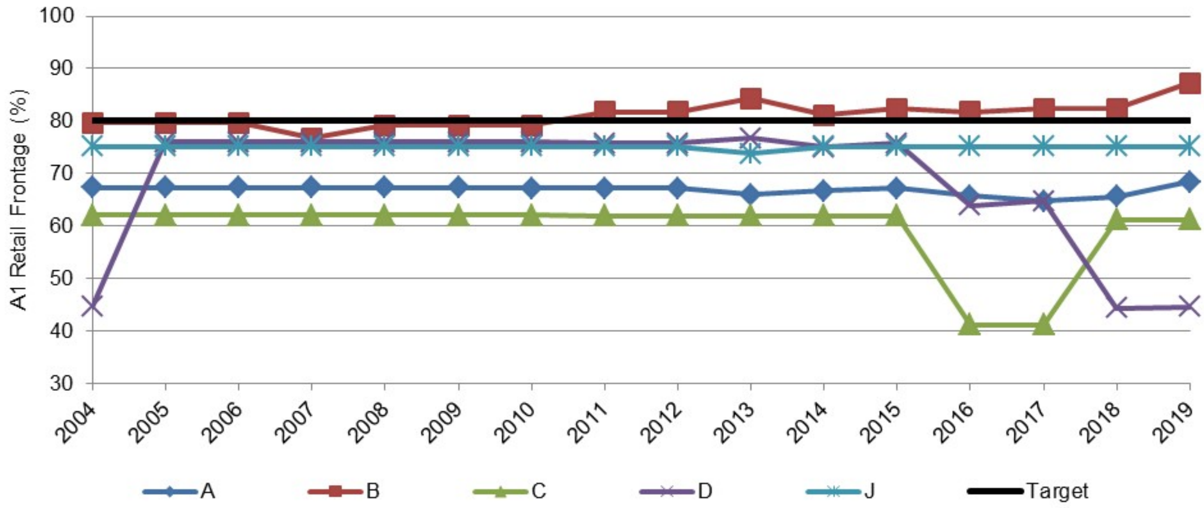
- 18/00369/CU – La Lanterna, 73 Bell Street: Change of use from A3 (restaurant) to A4 (drinking establishment) – 100sqm – under construction
- 17/00847/PAP – 77 – 83 Bell Street: Change of use from office to residential, resulting in a loss of 698sqm of B1(A) – under construction
- 15/02835/F – 9A Castlefield Road: Erection of B1 office extension, gain 218sqm (B1(A)) – not started
- 16/01324/P – 99 Bell Street: Office to residential permitted development, loss 869sqm B1 (A)) – not started

Frontages

Primary

Figure 12 shows that frontage B (87.2%) continues to be the only primary frontage to exceed the 80% threshold for A1 retail, although frontage J is only slightly below target with 75.2% and frontage A following closely behind with 68.4%. Frontage D continues to fall considerably below the target at 44.6%, following last year's opening of Wagamama restaurant (A3) within large, previously vacant unit, following a planning permission 15/02290/CU, which was granted on appeal.

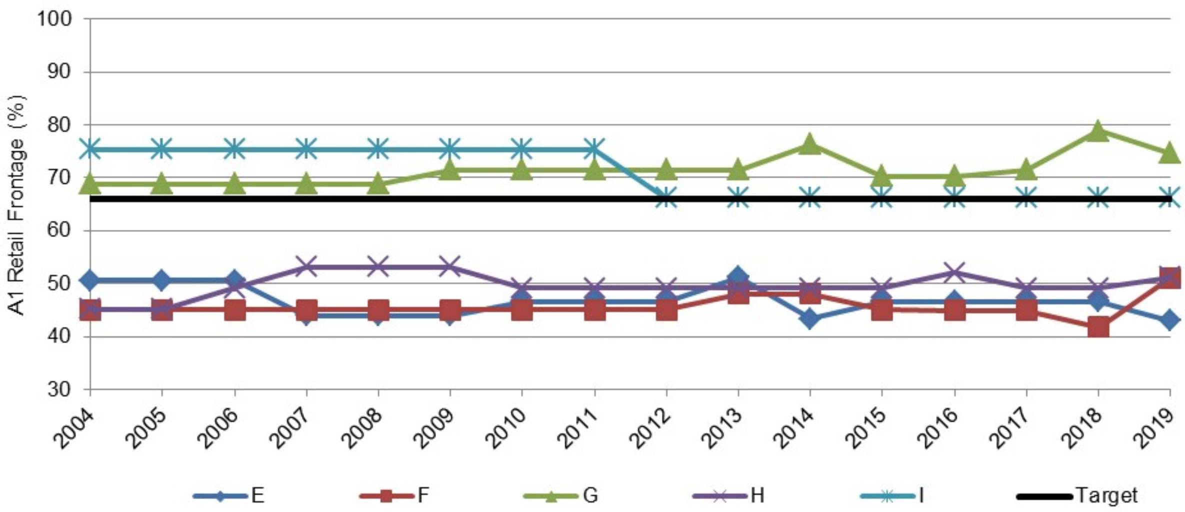
Figure 12 Reigate Primary Frontage A1 Retail Trend



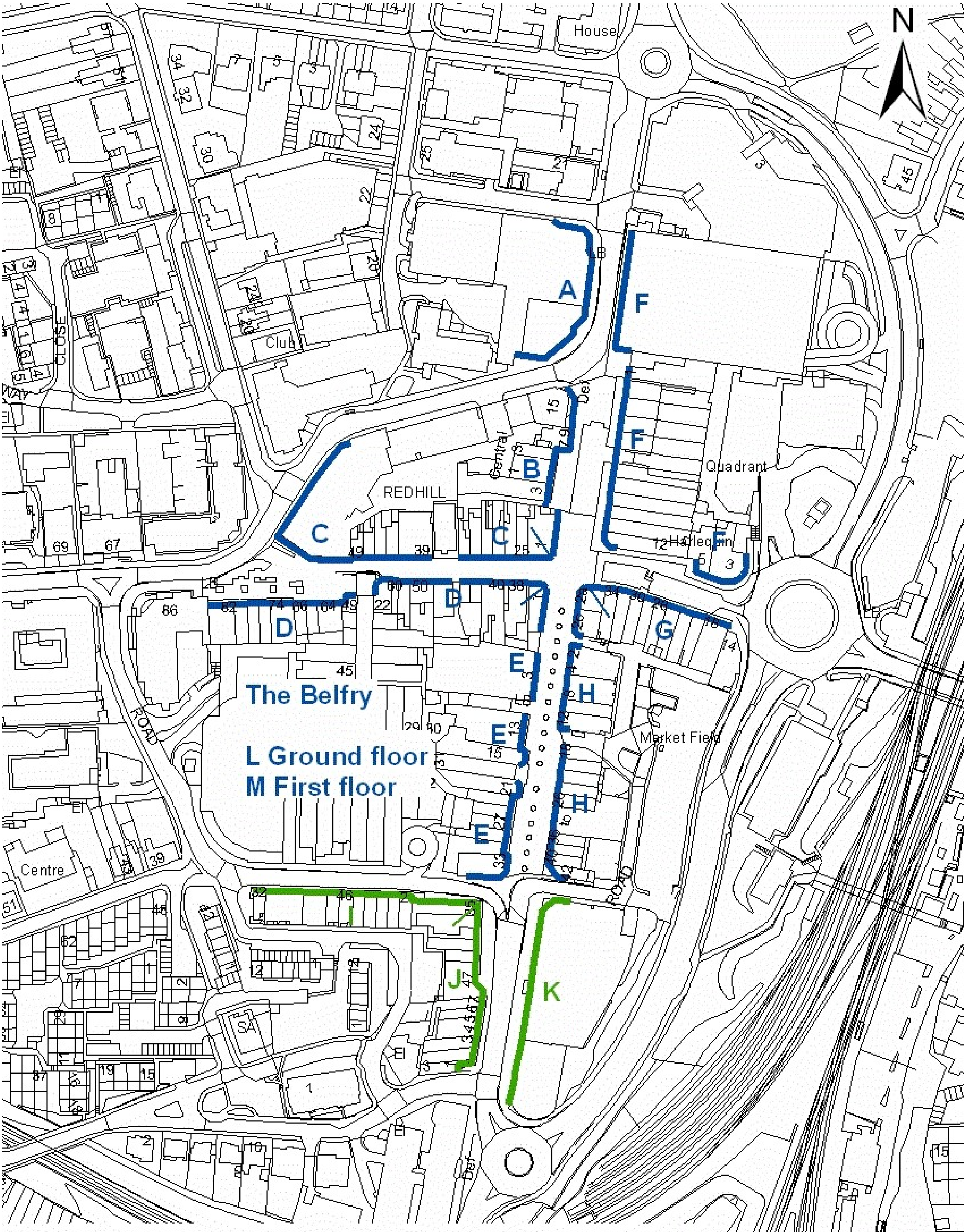
Secondary

As can be seen from Figure 13, there has been little change to the proportion of A1 frontage within the secondary frontage: frontages G and I continue to be the only frontages exceeding the 66% threshold (74.6% and 66.2%) whilst frontages E, F and H continue to fall below (43.0%, 51.1% and 51.2%). One notable increase of A1 frontage was within frontage F (41.8% to 51.1%) primarily due to a closure of one A3 unit (Carluccio's).

Figure 13 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, offering a large variety of predominantly comparison retail.

An ongoing major works have been taking place to improve the public realm and townscape, including the development of a new Sainsbury's supermarket with Argos store, Travelodge hotel and gym completed during the previous monitoring period. A number of planned works are now under way, including the construction of residential accommodation on the Former Liquid & Envy site as well as the construction of a new retail and residential complex, following the demolition of existing units on Cromwell Road. The redevelopment of Marketfield Way to include a Cinema, restaurants, retail and residential accommodation, granted permission during the previous monitoring period is currently still awaiting commencement.

Vacancies & New Occupiers

There have been a number of occupier changes within the last twelve months, 12 occupiers have moved into Redhill town centre, 18 have left and 4 have relocated to new units.

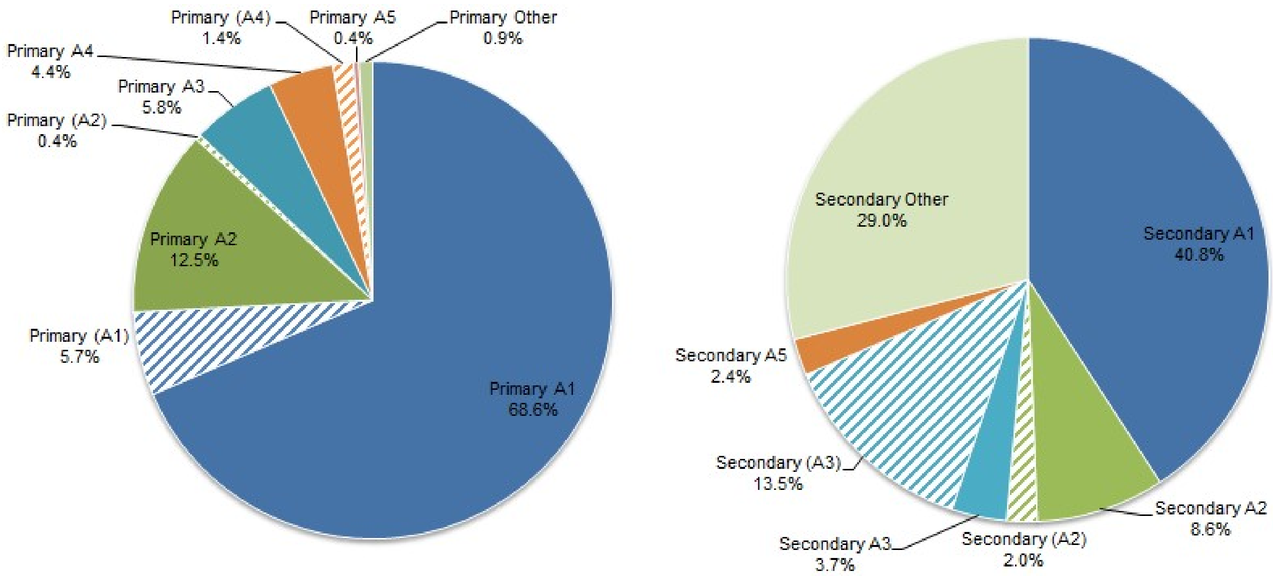
Redhill continues to have the greatest number of vacant premises of all the borough's town centres. Within the monitoring period the proportion of vacant units has decreased (10.6% to 9.8%), whilst both vacant floorspace and vacant frontage have increased marginally (5.0% to 5.8% and 8.0% to 8.5% respectively). A number of previously vacant units have been removed from this monitor, following the demolition of 16-46 Cromwell Road, and the vacancy rate also reflects the increased number of units being vacated in preparation for the redevelopment of Marketfield Way.

	Vacancy Rate
% of units	9.8%
% of frontage	8.5%
% of net retail floorspace	5.8%

Vitality

As shown in Figure 14, A1 to A5 uses constitute around 99.1% of the total primary frontage and 71.0% of the total secondary frontage. More specifically, premises currently occupied by A1 uses represent 68.6% of total primary and 40.8% of total secondary frontages. 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 emerging Development Management Plan the retail frontages are being reviewed.

Figure 14 Breakdown of Frontage by Use (Primary – Left; Secondary – Right)



As would be expected for a sub-regional destination and the borough's primary town centre, comparison retail remains the dominant retail offer, amounting to nearly half of the floorspace (46.4%) within the town centre. Convenience retail follows second with 32.9%, largely due to a substantial floorspace occupied by Sainsbury's supermarket (see Table 6 for details).

Conversely, the proportion of food & drink floorspace in Redhill is considerably lower than the borough's other three centres. Food & drink floorspace takes up 4.8% of the total floorspace in Redhill but in comparison Reigate, Horley and Banstead have around twice as much (18.6%, 11.2% and 17.1%).

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 (39.0%)	21,848 (46.4%)
Convenience	14 (8.5%)	15,460 (32.9%)
Service	50 (30.5%)	4,561 (9.7%)
Food & Drink Leisure	14 (8.5%)	2,237 (4.8%)
Non-Retail	6 (3.7%)	224 (0.5%)
Vacant	16 (9.8%)	2,718 (5.8%)
Total	**164**	**47,047**

Developments & Use Class Changes

As part of the regeneration of the town, there are two major outstanding planning applications with the potential to deliver 6,212sqm of commercial floorspace:

- 18/01158/F – 16-46 Cromwell Road: Demolition of existing units and construction of mixed retail and residential development. The existing units have now been demolished and have been taken out of this monitor. Therefore the new permission (when implemented) will be counted as a net increase of 360sqm of additional floorspace (A1, A2, A3, A5, D1 or D2). This site is currently under construction.

- 16/01066/F – Marketfield Car Park: Mixed use redevelopment of Marketfield Car Park (additional 4,365sqm retail, 1487sqm leisure and 153 residential flats) has not yet commenced.

The following permissions were completed within the last 12 months resulting in a net loss of 16sqm of street level commercial floorspace and a further 412sqm loss of commercial floorspace on the upper floors:

- 14/00763/CU – 26-28 Station Road: Change of use office to residential (loss of 412sqm B1(A) on upper floors and 6sqm A3 & 10sqm A1 floorspace on ground floor) and residential extension.
- 18/00802/CU – The Hub Redhill, 41 High Street: Change of use from A1 to A2 (73sqm)

A number of permissions are under construction; these have the potential to deliver a loss of 158sqm of street level commercial floorspace and a further loss of 75sqm of commercial floorspace on the upper floors:

- 18/02499/CU – 39 – 40 The Belfry, Station Road: Change of use A1 shop to D2 soft play (589sqm)
- 17/02783/F – 41 – 47 High Street: Reconfiguration to retain commercial units in the front and change rear to residential (loss of 158sqm of A1)
- 18/00158/PAP – 47A Station Road: Office to residential permitted development on first and second floor (loss of 75sqm of B1(A)

There are also a number of other permissions which have not yet commenced; these have the potential to result in a total net gain of 586sqm of street level commercial floorspace and a loss of 153sqm of commercial floorspace on the upper floors:

- 17/00460/F – Warwick Quadrant: Infilling of the ground floor colonnade along London Road and Station Road (gain of 511sqm of A1) and the conversion and extension of the existing toilet to form a new retail unit (gain of 115sqm of A1).
- 17/03013/F – 36-38 Station Road: Change of use from office/retail to residential on first floor (loss of 91sqm A1 and 16sqm A2)
- 18/02668/F – Choice News, 46 Station Road: demolition of rear parts and reconfiguration to provide 3 dwellings on first and second floors and basement storage (loss of 8sqm of A1 and loss of 38sqm of SG)
- 18/00813/F – The Eagles Nest, 33 High Street: Change of use on ground floor from A4 to A3, upper floors change from 1 residential unit to 3 (loss of 201sqm of A4, gain of 161sqm of A3)

Further two permissions are currently outstanding. These are outside of the designated retail area but still within the town centre:

- 19/00914/PAP – Quadrant House, Princess Way: Change of use from office to residential (loss of 3,893sqm of B1(A))
- 18/01857/F – The Abbot Public House, 14 Station Road: Conversion and extension to create retail frontage and 10 apartments (loss of 219sqm of A4 and gain of 244sqm of flexible commercial floorspace – A1, A2, A3, A4, B1(A) or community D1 or D2)

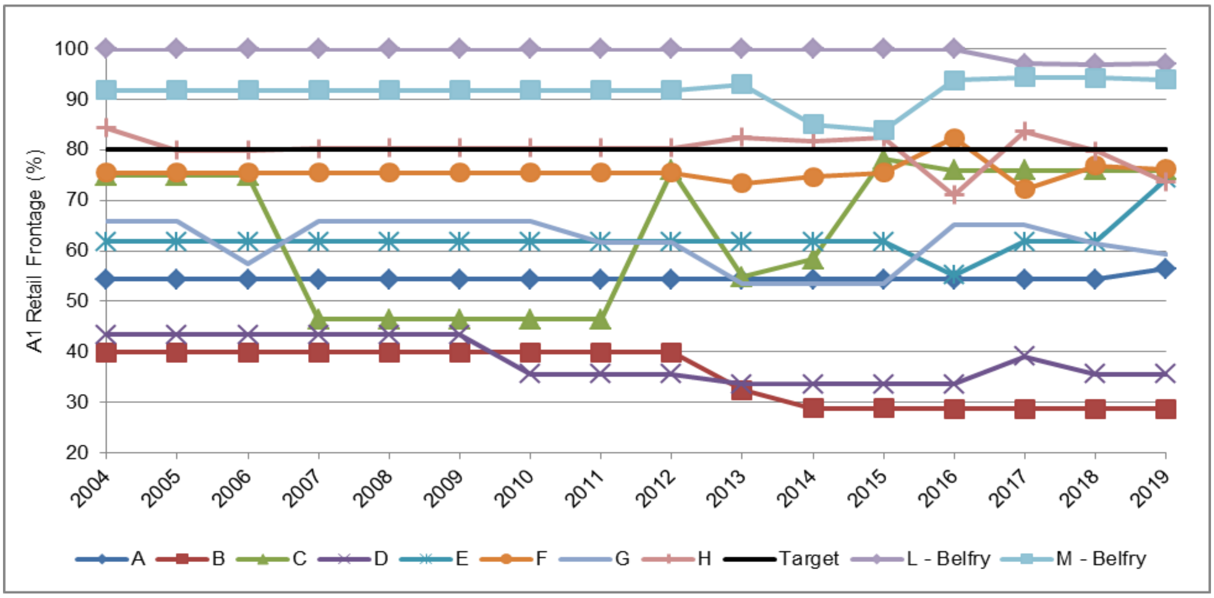
Frontages

Primary

As shown in Figure 15, 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 (97.1% and 93.9%) whilst frontage B has the lowest representation (28.8%).

As has been the case for many years, frontages L and M continue to exceed the 80% primary A1 retail threshold whilst frontages H (73.6%) F (76.1%) and C (75.9%) hover just below the target. Within this monitoring period, frontage E has also increased its proportion of A1 use to a similar level (74.3%), mainly due to the closure of The Tower public house (A4). The remaining primary frontages continue to fall considerably below the 80% primary A1 retail threshold; in particular the frontages B and D both consist of less than 50% (28.8% and 35.6% respectively). 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.

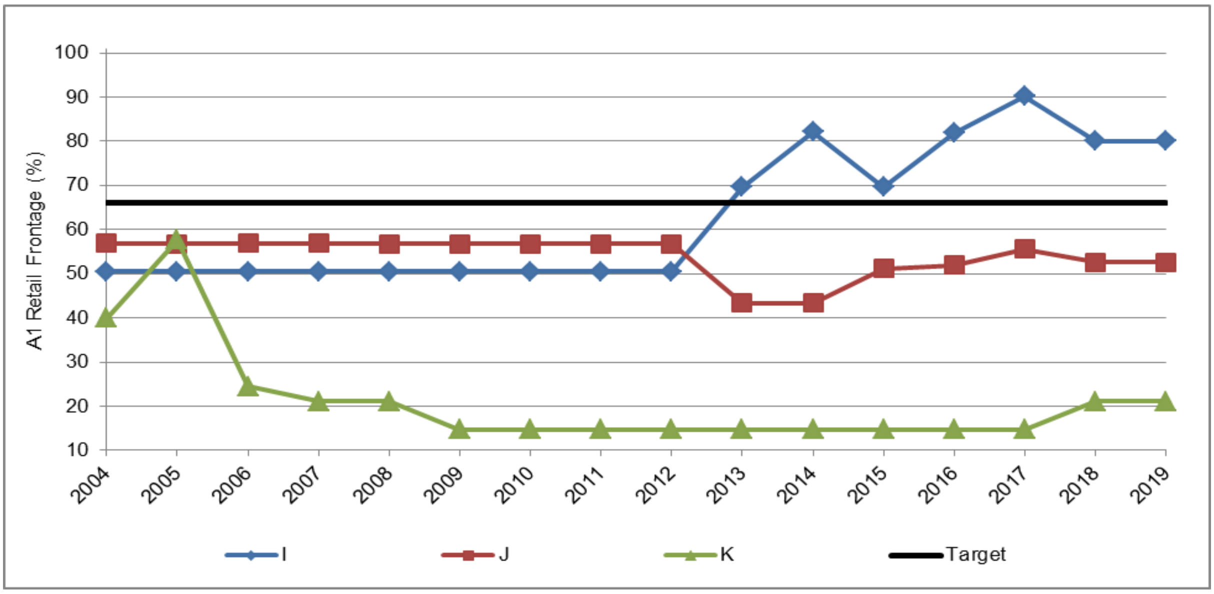
Figure 15 Redhill Primary Frontage A1 Retail Trend



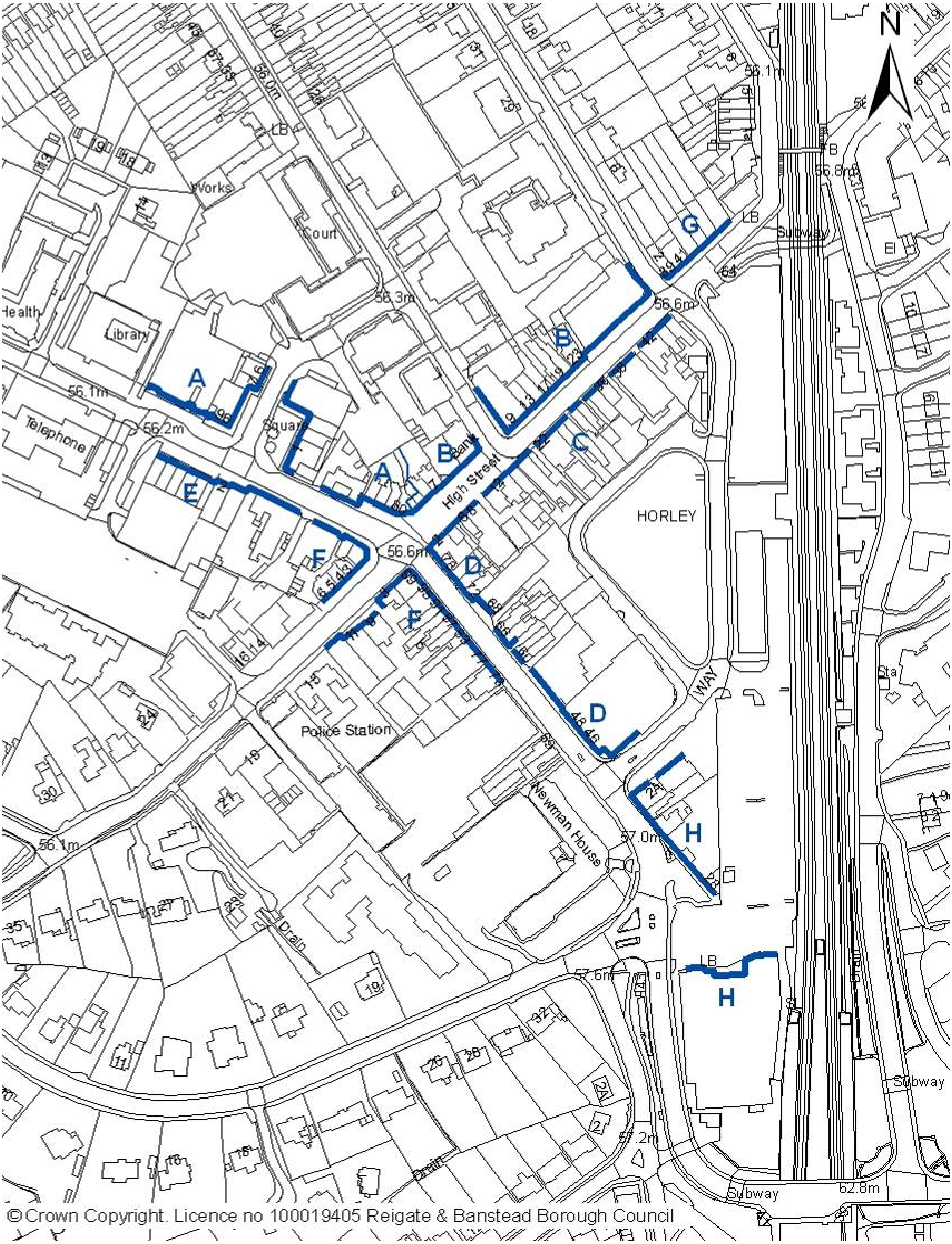
Secondary

Within the last twelve months, there has been no change in the proportion of A1 use within the secondary retail frontage in Redhill. Frontage I has the greatest proportion of A1 retail (80.0%), exceeding the 66% target set out in the Borough Local Plan, whilst frontage K has the lowest representation (21.1%) due to Kingsgate and Red Central office developments replacing previous retail frontages with office frontage (see Figure 16). As part of the emerging Development Management Plan the retail frontages are being reviewed to ensure they remain relevant and robust.

Figure 16 Redhill Secondary Frontage A1 Retail Trend



Horley Town Centre



Commentary

Horley town centre is 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 increased. In 2012 Horley was awarded £100,000 government funding from the 'High Street Innovation Fund' to help reverse this trend and boost vitality. Several 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 several occupier changes: 7 occupiers have moved in and 9 have left. The number of vacant units has increased from 9 to 11; however the percentage of net retail floorspace has dropped from 7.5% to 5.3%. This is largely due to the discount goods store 'Savers' moving into a large, previously vacant unit.

	Vacancy Rate
% of units	10.5%
% of frontage	8.0%
% of net retail floorspace	5.3%

Vitality

Figure 17 shows that A1 to A5 retail frontage accounts for 95.6% of the total frontage and over half is in occupied A1 use (54.4%). This is considerably below the 70% monitoring target set in the Borough Local Plan 2005, however a slight improvement on the previous year (52.9%).

Figure 17 Breakdown of Frontage by Use Class

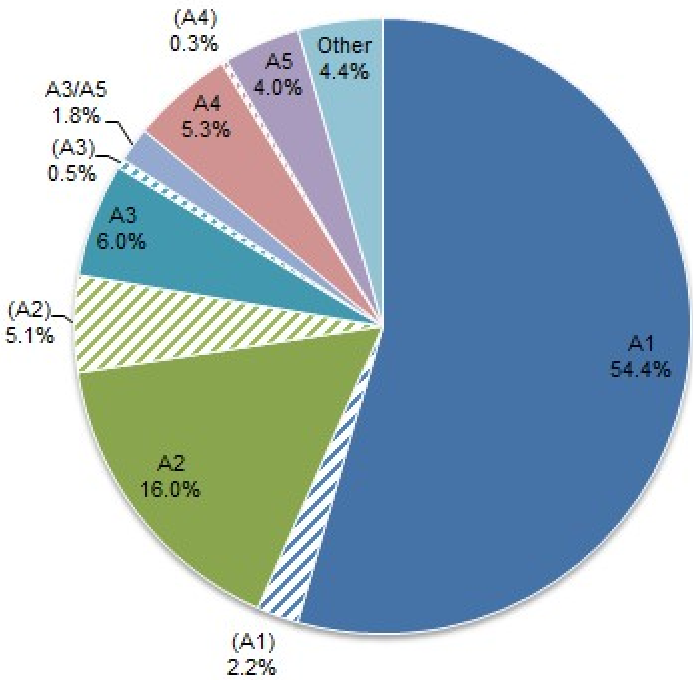


Table 7 shows the breakdown of the retail offer in Horley town centre. Compared to the other town centres Horley has the second greatest percentage of convenience units (10.5%); Banstead has the greatest percentage (12%).

In comparison to the other town centres, Horley continues to have a considerable number of take-a-ways (6, same as Banstead) and charity/ second-hand retailers (9, followed closely by Banstead with 8). 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	25 (23.8%)	5,768 (33.7%)
Convenience	11 (10.5%)	5,433 (31.7%)
Service	33 (31.4%)	2,783 (16.3%)
Food & Drink Leisure	20 (19.0%)	1,922 (11.2%)
Non-Retail	5 (4.8%)	303 (1.8%)
Vacant	11 (10.5%)	916 (5.3%)
Total	**105**	**17,126**

Developments & Use Class Changes

Within the last twelve months two developments have been completed within the existing retail area, resulting in a loss of 204sqm of commercial floorspace on the upper floors:

- 16/00096/PAP3M – 12-14 High Street: Office to residential first floor permitted development (loss of 89sqm of B1(A))
- 17/02710/PAP3O – 1st and 2nd floor, 83 Victoria Road: Office to residential permitted development (loss of 115smq B1(A))

One further development has been completed, which is located outside of the existing retail area but still within the town centre boundaries. The site will be included within the retail area under the emerging DMP:

- 15/00500/F – Land Parcel at 71 Victoria Road: Mixed use redevelopment comprising retail (gain 187sqm of A1) and residential

There are number of permissions under construction which would lead to a loss of 40sqm of street level commercial floorspace and a further loss of 1,145sqm of commercial floorspace on the upper floors:

- 14/00317/F – Saxley Court, 121-129 Victoria Road: Change of use of upper floors from office to residential (loss of 1,063sqm of B1(A))
- 16/02193/PAP3O – Part second floor 100 Victoria Road: Office to residential permitted development (loss of 82sqm of B1(A))
- 18/00320/PAP3M – 83 Victoria Road: Retail to residential permitted development (loss of 40sqm of A1)

One further development is currently under construction outside of the designated retail area but within the existing town centre boundaries:

- 18/02228/PAP3O – The Gables, 17 Massetts Road: Office to residential permitted development (loss of 1,280sqm of B1(A))

There are also a number of outstanding planning permissions which if delivered would lead to a 19sqm gain of street level commercial floorspace and a net loss of 283sqm of commercial floorspace on the upper floors:

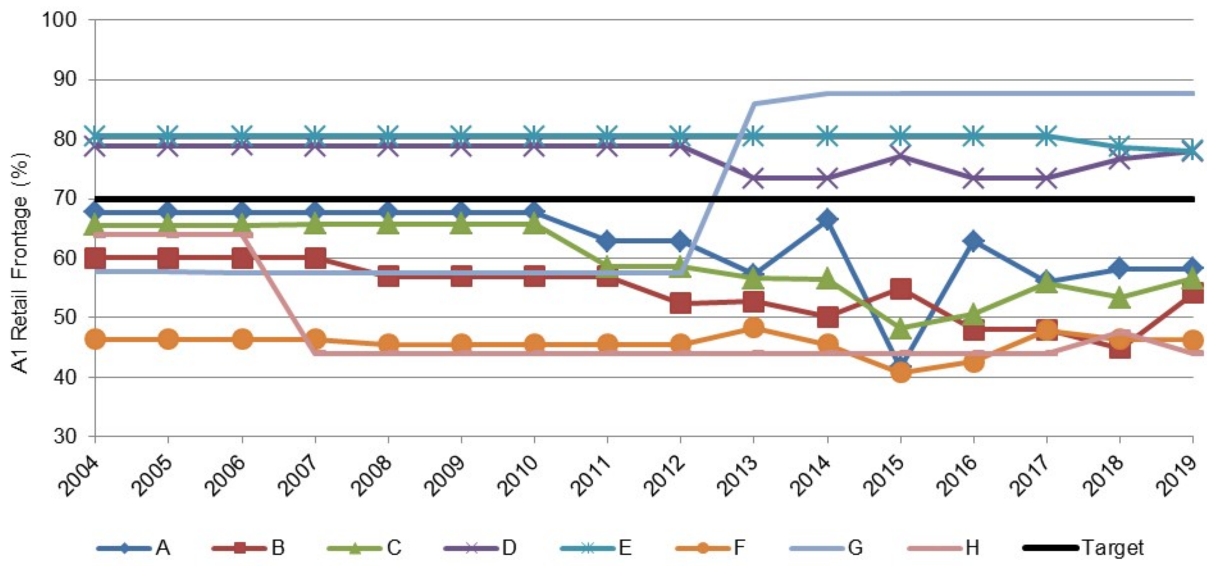
- 18/02031/F - 38/40 High Street: Change of use A1 to SG Sunbed & beauty store (765sqm)
- 18/02254/PAP3O – 1 Massetts Road: Office to residential first and second floor permitted development (loss of 195sqm of B1(A))
- 19/00158/PAP3O – 84A Victoria Road: Office to residential first and second floor permitted development (loss of 88sqm of B1(A))
- 19/00597/F – Oxfam, 7 High Street: Extension to retail unit (gain of 19sqm of A1)

Frontages

Figure 18 shows that 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 (87.7%) whilst frontage H has the least (44.0%) due to a high proportion of food and drink providers 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 (77.9%, 78.0% and 87.7%) whilst frontages A, B, C, F and H continue to fall below this level.

Figure 18 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.	A1 (including up to 2 flats) C3 (up to 150m²)* A3 (up to 150m²)* A2 (including with up to 2 flats) D2 (up to 200m² if premises were in A1 use on 05/12/2013)* B1 (up to 500m²)*
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 (including up to 2 flats) A2 (including up to 2 flats) A3 (up to 150m²)* B1 (up to 500m²)* C3 (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 to B1 (up to 500m²)* A5 to C3 (up to 150m²)*
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 (Dwelling houses)	Use as a dwelling house, whether or not as a sole or main residence.	C4
C4	Small shared dwelling houses occupied by between	C3

(Houses in Multiple Occupation)	three and six unrelated individuals, as their only or main residence, who share basic amenities such as a 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 150m^2 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 to150m^2 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 150m^2)* C3 (up to 150m^2)* D2* Amusement arcade to: C3 (up to 150m^2)*
Sui Generis** **(Betting Offices and Pay Day Loan Shops)**		A1 (including up to 2 flats) A2 (including up to 2 flats) A3 (up to 150m^2) C3 (up to 150m^2)* D2 (up to 200m^2)
Sui Generis** **(Agricultural Buildings)**		A1, A2, A3, B1 (up to 150sqm)*, B8, C1, C3 (up to 150sqm)*, D2*
A1, A2, A3, A5, B1, D1, D2	Permitted development rights allow these uses to be temporarily used for A1, A2, A3, B1, D1 and D2 uses for a period of up to three years.	

*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 (Permitted Development, Advertisement and Compensation Amendments) (England) Regulations 2019 makes a number of amendments to the Town and Country Planning (General Permitted Development) (England) Order 2015. It 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.gov.uk/guidance/when-is-permission-required

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:

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Tel: 01737 276000

Email: LDF@reigate-banstead.gov.uk