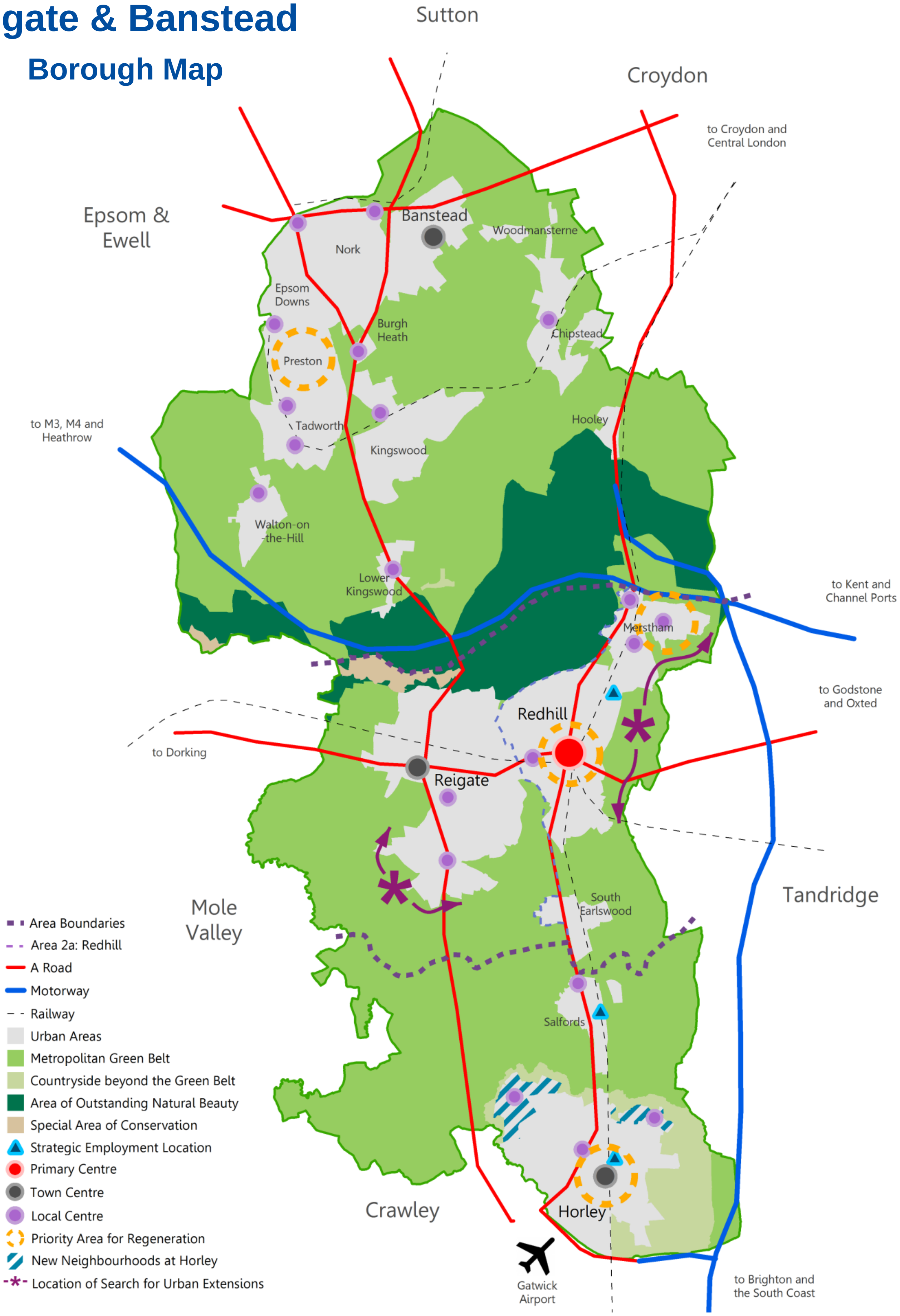
Town Centre Monitor

Position at March 2015

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

Reigate & Banstead

Borough Map



Town Centre Monitor

Position at the end of March 2015

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 in March 2015. 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 within these areas
- Monitor relevant local policies contained within the Borough Local Plan, namely policies Sh1, Sh7 & Sh8
- Monitor the progress of new developments and regeneration schemes
- Provide a robust and up-to-date evidence base to assist in plan-making and decision-taking on planning applications within town centres

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

Future Policy Developments

The Borough Local Plan 2005, including its saved policies, is in the process of being replaced by new local planning documents. The Council adopted its Core Strategy in summer 2014 and detailed policies and employment land allocations will be set out in a subsequent Development Management Policies.

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

Relevant Local Policies and Indicators

Policy	Monitoring Target
Sh1	Improve shopping provision within Town centre Shopping Areas and resist the loss of existing or proposed retail floorspace
Sh7	Resist the loss of A1 retail frontage within Primary Shopping Areas of Reigate and Redhill Town centres unless the proportion is above 80%; and the same within Secondary Shopping Areas unless the proportion is above 66%
Sh8	Resist the loss of A1 retail frontage in Banstead Village and Horley Town centre unless the proportion is above 75% and 70% respectively.
Core Strategy	Significant effects indicator – vacancy rates in Town centres (units) – target 5%

The guidance and the policies are available under Planning Policies on the Council's web site: http://www.reigate-banstead.gov.uk/planning

Retail Hierarchy

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

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

Town Centre Retail Composition

Within the borough's four town centres there are 563 units which provide almost 90,000sqm of floorspace and 5,340 meters of frontage. As can be seen in figure one, 31% of the units are located in Reigate, followed by 30% in Redhill, 21% in Banstead and 18% in Horley. Figure one also shows that in terms of net retail floorspace almost half is located in Redhill which is expected due to its position as the borough's primary town. This is followed by 22% in Reigate, 19% in Horley and 14% in Banstead; again expected due to their more convenience nature.

Figure 1 Distribution of Town centre Units & Floorspace

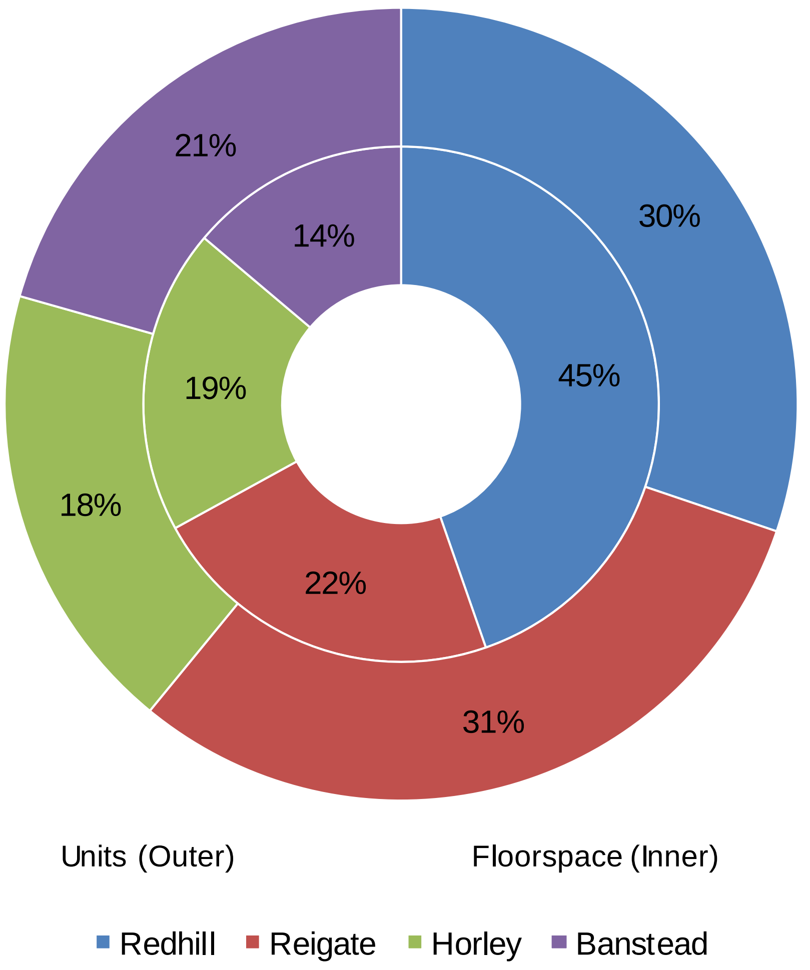
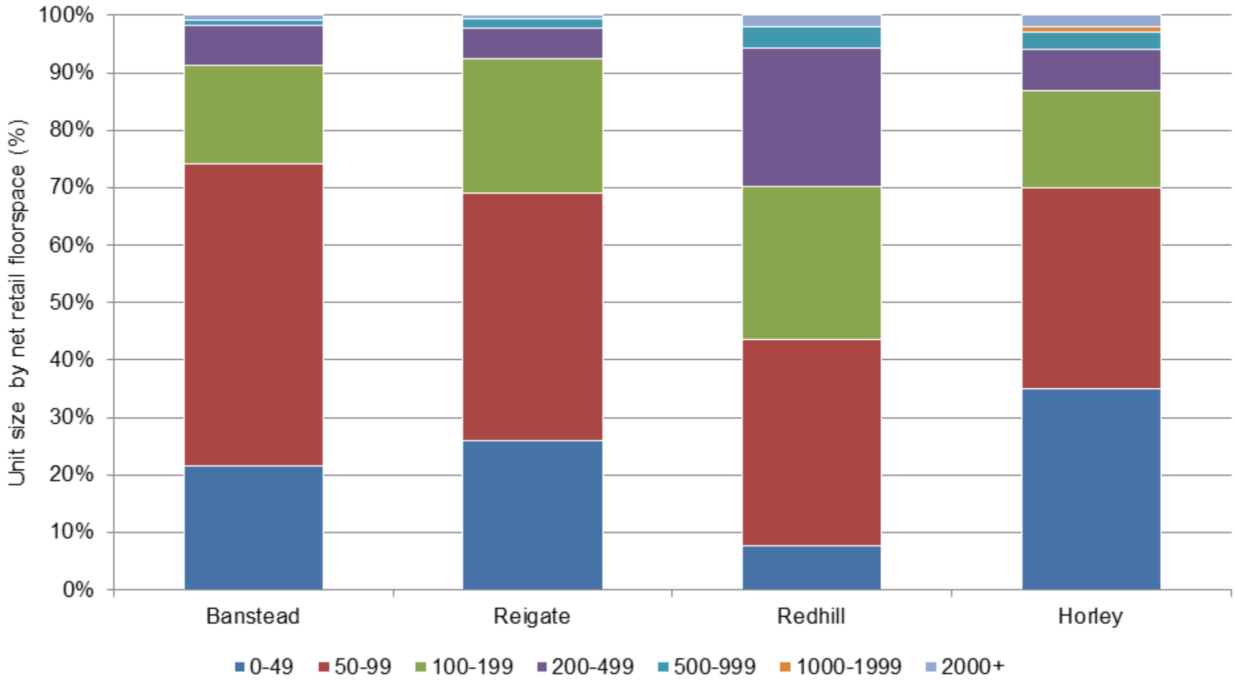


Figure two shows the variation of unit size, as determined by net retail floorspace, for the four town centres. It shows that Redhill has the greatest percentage of retail units of 100sqm or greater (56%) whilst Banstead has the greatest percentage of units under 100sqm (74%). These figures can be explained by the nature of the retail offer: Redhill is the borough's major retail destination whilst Banstead provides a more local convenience retail offer. Horley and Reigate also have high percentages of units under 100sqm (70% and 69% respectively) which is again is expected due to their more local nature.

Figure 2 Breakdown of Town centre Units by Net Retail Floorspace



Overall Trends – Key Messages

National Retail Trends

According to recent reports and figures from the House of Commons and the Office for National Statistics the retail industry is in a strong position: in 2014 it accounted for 10% of all businesses, 20% of employment and 36% of turnover. Within 2013-2014 there was a 4.3% growth in the quantity bought in the retail industry, a 1.9% growth in retail spending and an increase in the average weekly spend from £8.9 billion to £9.0 billion.

The Local Data Company also reports that the retail industry is in a strong position noting that retail vacancies are at their lowest level since 2010, 13.9%. They however highlight regional variation with the north-west reporting the highest level of vacancies, 17.3%, and London reporting the lowest, 8.1%. The report also notes that smaller towns tend to have lower average vacancy rates than larger towns and that the high street is outperforming retail parks and shopping centres.

The British Retail Consortium and Local Data Company both note the important role that major food retailers have played in the reduction of the number of vacant premises- their recent accelerated expansion into convenience retail has aided a reduction in the number of vacant premises. The Local Data Company reports that for every £1 spent in the retail sector 47p was spent in food stores.

However, the Office for National Statistics warns that despite the decline in retail vacancy, retail spend has fallen by 2.2% due to a 9.7% decline in spend at fuel stations. This is due to petrol and diesel prices declining to their lowest level since October 2009 and March 2010 respectively.

The Office for National Statistics also notes that despite the decline in retail vacancy that between 2013-2014 and 2012-2013 there has been a decrease in the number of retail premises registered for VAT/PAYE (from 287,100 to 284,885). Specifically, for Reigate and Banstead the Office for National Statistics reports a slight decline from 585 to 575.

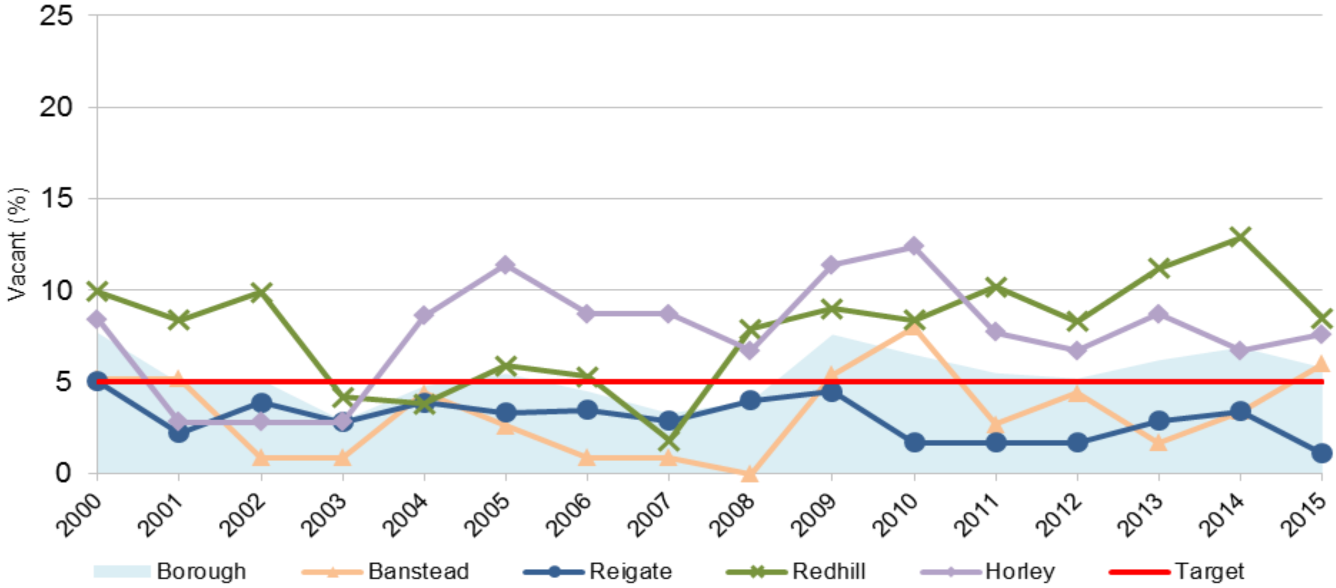
Borough Key Messages

- **Vitality:** A1 remains the dominant use within the borough's town centres. Within the last twelve months A1 has declined slightly (from 67.8% to 67.6%) and A1-A5 frontage has increased slightly (from 96.1% to 96.2%).
- **Retail Uses:** When the retail offer across all the town centres is examined it is noted that comparison retail dominates. It occupies 37% of all of the units in all the town centres. The majority of this comparison retail is clothing, footwear and accessories (32% of comparison retail and 12% of all units). Banstead, Reigate and Redhill have the greatest proportion of their units as comparison based units. In contrast, excluding Non A Class and vacant units, convenience retail occupies the least number of units, 9.2% of all of the units in all the town centres. Horley has the greatest proportion of its units as convenience units.
- **Vacancy Rate:** Within the past twelve months the number of vacant units across all four town centres has declined from 39 to 33 (6.9% to 5.8%). This remains below the national average of 14%. Reigate and Redhill have seen declines (3.4% to 1.1% and 12.9% to 8.5%) whilst Banstead and Horley have seen increases (3.4% to 6.0% and 6.7% to 7.6%).
- **New Occupiers:** 39 new occupiers have moved into the four town centres within the past year and 3 have relocated within their existing town centres. Once again Reigate saw the greatest number of new occupiers (16) whilst Banstead saw the least (6).
- **Planning Permissions:** There are currently 21 planning permissions either under construction, outstanding or extant. If these are all developed they would provide a net increase of 13,306sqm of additional floorspace. The greatest increase would be seen in Redhill (13,790sqm) and the greatest reduction in Horley (1,332sqm).

Vacancies & New Occupiers

Vacancy Trend

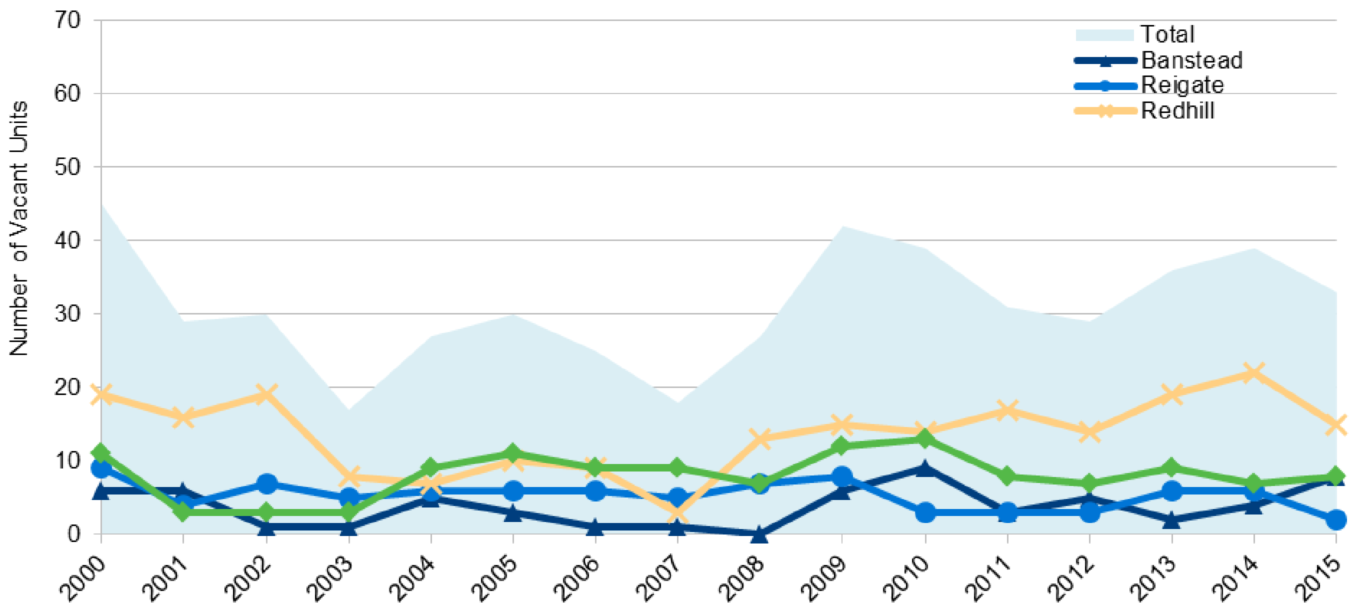
Figure 3 Percentage Vacancy Rate (2000-2015)



Within the last twelve months the overall town centre vacancy rate across the borough has declined from 6.9% to 5.8%. n spite of the ongoing challenges facing high street retail, the level of vacancy in each of the borough's four town centres is still comfortably below the national average (14%).

During the monitoring period, vacancy rates in Reigate and Redhill have fallen (3.4% to 1.1% and 12.9% to 8.5% respectively), with the improvement in Redhill particularly marked. Conversely, vacancy rates in Banstead and Horley have increased (3.4% to 6.0% and 6.7% to 7.6% respectively). Reigate is now the only town centre which has a vacancy rate below the borough's 5% target as the increase in the number of vacant premises in Banstead has led to it exceeding this target for the first time since 2009. Conversely, Redhill and Horley continue to have vacancy rates greater than this figure: Redhill since 2007 and Horley 2004

Figure 4 Number of Vacant Units (2000-2015)



There are currently 33 vacant retail premises across the borough's four town centres, a decrease from 39 recorded in last years monitor: Banstead has seen the greatest increase and Redhill the greatest decline. It is expected that the number of vacant units will decline in Redhill over the next few years as the major regeneration works planned get under way.

It is also important to consider the length of vacant frontage within the town centres as vacant units with a large frontage will arguably have a disproportionate visual impact upon the town centre. Within the last twelve months vacant frontage has fallen from 7.2% to 4.6%.

Table 1 summarises the overall town centres vacancy position. Within the last twelve months the percentage of vacant premises has declined from 6.9% to 5.8%; frontage has declined from 7.2% to 4.6% and vacant floorspace from 4.1% to 3.1%. The large decline in floorspace (24%) and frontage (36%) compared to the number of vacant units (16%) is due to a number of larger units with longer frontages that were previously vacant becoming occupied.

Table 1 Summary of Current Vacancy Position

	Total	Vacant	Vacancy Rate
Units/Premises (No.)	565	33	5.8%
Frontage (Metres)	5,349	246	4.6%
Floorspace (Sqm)	88,924	2,731	3.1%

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 demands it is important that an appropriate mix of uses is maintained. A key objective of local policy (Sh1, Sh7 and Sh8) is the promotion of A1 uses and the resistance of excessive change away from core retail uses.

Figure 5 shows that across the four town centres nearly all of the units (96.2%) fall within A1 to A5 uses and specifically 67.6% are A1 use. These are similar figures to last year, 96.1% A1-A5 and 67.8% A1 use.

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

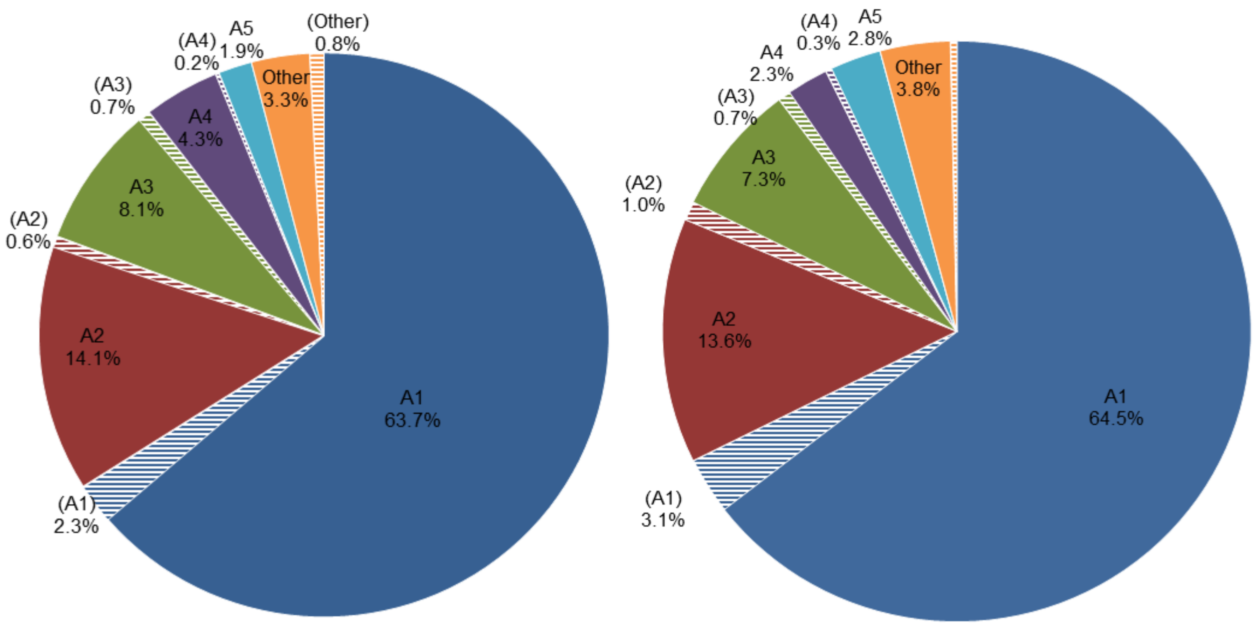


Figure 5 shows that across the four town centres the majority of retail frontage (95.9%) is A1 to A5 use and specifically 66.0% is A1 use. Within the last twelve months there has been slight increase in A1-A5 frontage from 95.8% to 95.9% and specifically A1 from 66.2% to 66.0%.

Figure 6 A1 Retail in Town Centre Units (2004 – 2015)

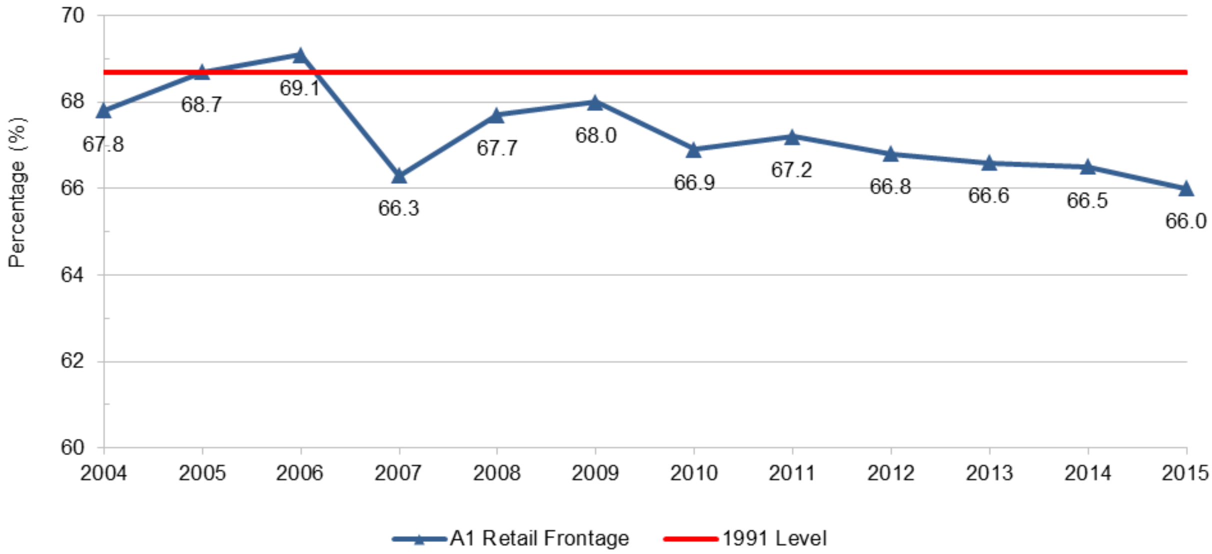


Figure 6 demonstrates that on the whole policies aimed at protecting against excessive loss of A1 premises in town centres have been successful. In 1991, A1 represented almost 69% of total frontage across the four town centres and although there has been slight movement over the years, overall the proportion remains the same, there has only been a slight decline from 69% to 66%.

Retail Offer

In addition to use classes, 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 some change to retail offer across the borough's four town centres. Convenience, food and drink leisure and non-retail have all slightly increased, whilst service has decreased slightly and comparison has remained the same. Despite these changes, comparison still dominates in terms of total units (209) and subsequently net floorspace (36,659sqm).

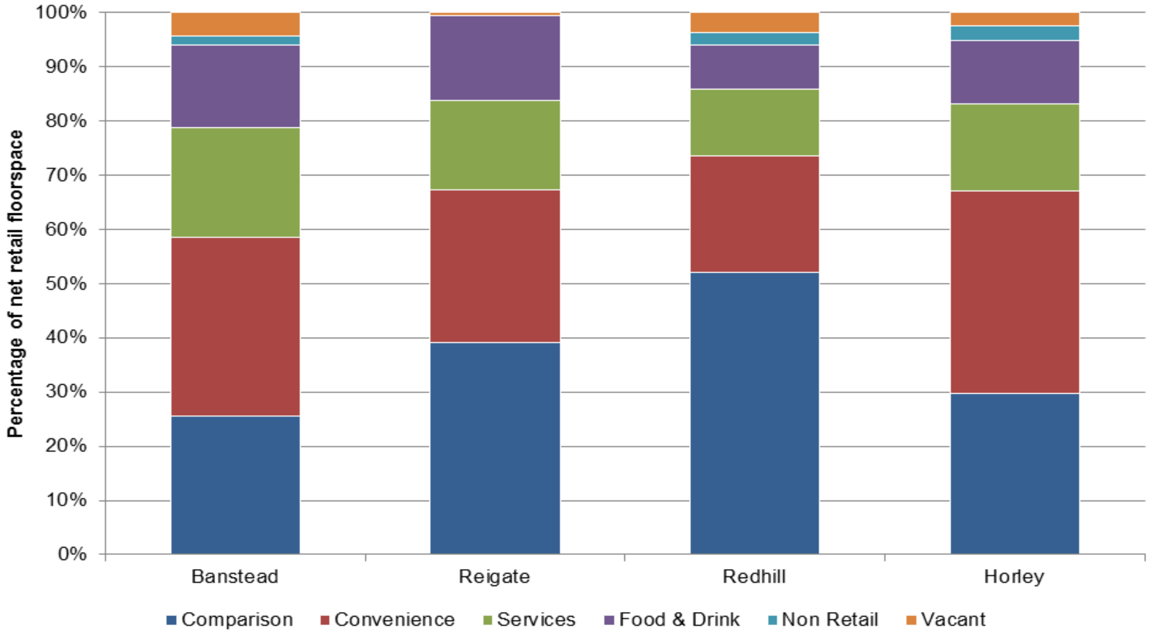
Table 2 below shows that once again convenience retail accounts for the lowest percentage of retail units (9%), yet still makes up over a quarter of the total retail floorspace (28%). This is largely due to the dominance of larger format supermarkets such as Sainsbury's in Redhill, Morrisons in Reigate and Waitrose in Horley. The table also shows that once again service retail offer makes up the second highest percentage of units (29%) however only makes up around 15% of total retail floorspace, suggesting that such businesses tend to occupy smaller retail units.

Table 2 Breakdown of Retail Offer

	Units	Floorspace(sqm)
Comparison	209 (37.0%)	36,659 (41.3%)
Convenience	53 (9.4%)	24,428 (27.5%)
Service	164 (29.0%)	13,417 (15.1%)
Food & Drink Leisure	87 (15.4%)	10,193 (11.5%)
Non-Retail	19 (3.4%)	1,600 (1.8%)
Vacant	33 (5.8%)	2,503 (2.8%)
Total	**565**	**88,800**

Figure 7 details the composition of retail floorspace across the four town centres.

Figure 7 Retail Offer by Centre



This illustrates that in terms of floorspace the dominant occupier within Banstead and Horley is convenience retail whilst comparison retail is for Redhill and Reigate. It also shows that comparison, convenience, services and food and drink leisure are the main occupiers of all the town centres whilst non-retail and vacant both occupy small percentages of the all the town centres.

Figure 8 Retail Offer by Retail Category

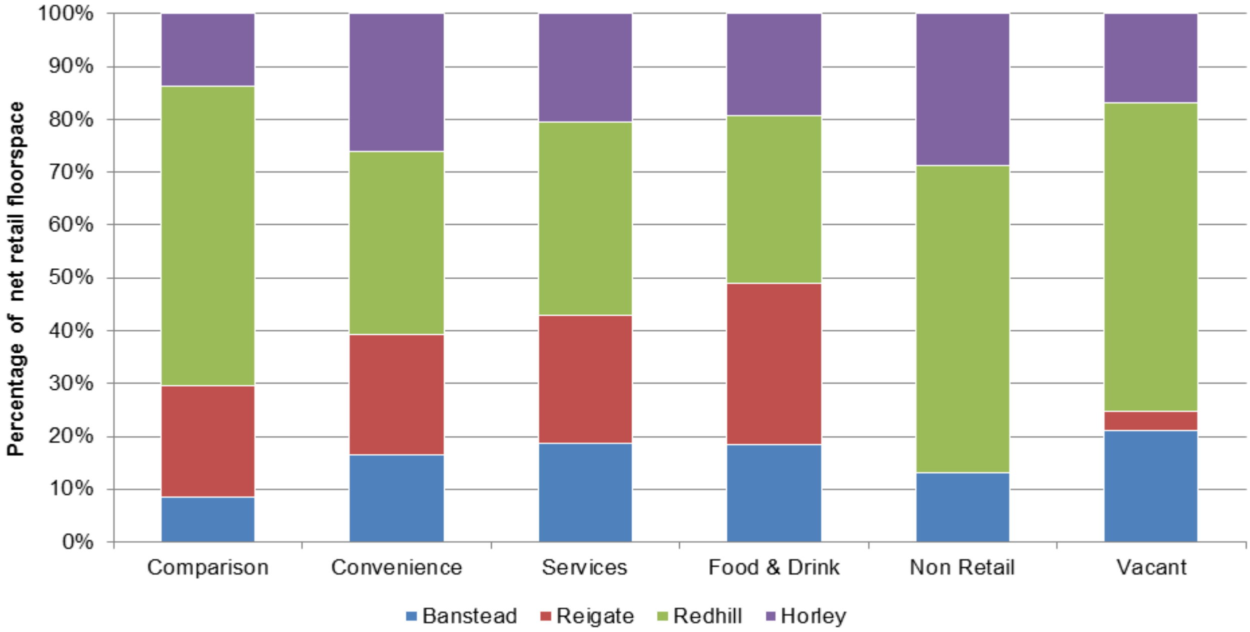


Figure 8 details the retail offer within the town centres, it shows that Redhill has the greatest percentage of net retail floorspace for all the retail categories which is expected due to its role as primary centre / regional hub. In particular, almost 55% of the comparison retail floorspace in the borough's town centres is located in Redhill. The picture is however more balanced for Food & Drink, with Redhill and Reigate both home to around 30% of the food & drink floorspace.

Main Retail Categories

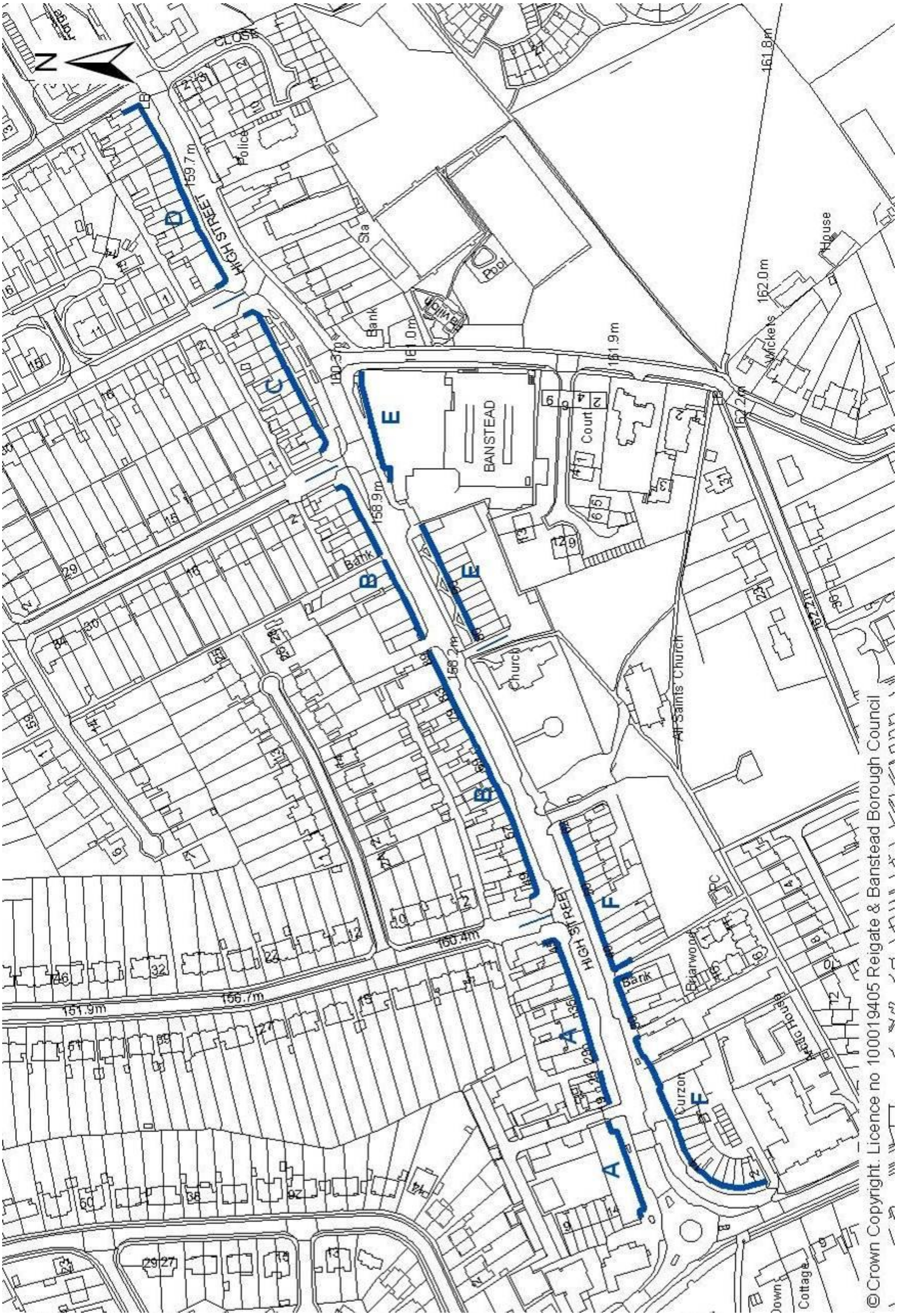
Table 3 illustrates that since the last monitoring period there has been a slight change to the retail offer within the four town centres: the total number of comparison, convenience, services, food and drink leisure and non A class units have all increased slightly whilst the number of vacant premises has declined. Despite these changes comparison retail remains the dominant retail offer (accounting for 37% of the total). This illustrates that in terms of the number of units the dominant retail occupiers of all town centres are comparison and service retail.

The table illustrates that for all the town centres the dominant type of comparison retail is clothing, footwear and accessories (32%) of which the greatest numbers are found in Reigate (32) and Redhill (18); that the dominant type of convenience retail is food/supermarket (56%) which has little variation in the numbers across the town centres (Horley, Redhill and Reigate all have 7 food/supermarket units whilst Banstead has 8); that the dominant type of service retail is hair and beauty of which Reigate and Redhill have the greatest number (13 each); and that restaurants are the dominant type of food and drink leisure establishments (40%) of which Reigate has the greatest number (14).

Table 3 Detailed Breakdown of Retail Categories (Units)

Comparison	Banstead	Reigate	Redhill	Horley	TOTAL
Clothing, Footwear & Accessories	12	32	18	6	68
Bookshops & Stationers	1	5	6	0	12
Home & DIY	8	14	3	3	28
Electronics & Technology	2	3	8	1	14
Charity/Second-Hand	8	7	8	9	32
Toys, Games & Sports	0	2	2	0	4
Other Comparison Retail (e.g. Gifts, Florists)	8	17	21	6	52
Total Comparison	**39 (33.6%)**	**80 (46.0%)**	**66 (38.6%)**	**25 (23.6%)**	**210 (37.0%)**
Convenience					
Food/Supermarket	8	7	7	7	29
Newsagents	1	3	4	3	11
Chemist/Pharmacy	4	2	3	3	12
Total Convenience	**13 (11.2%)**	**12 (6.9%)**	**14 (8.2%)**	**13 (12.2%)**	**52 (9.2%)**
Service					
Travel Agents	2	1	2	0	5
Hair & Beauty	11	13	13	10	47
Opticians	4	5	5	1	15
Banking	5	7	8	6	26
Estate Agents	7	12	6	8	33
Bookmakers	2	1	5	2	10
Dry Cleaning	2	3	2	2	9
Other Services (e.g. Employment, Repairs)	5	5	7	4	21
Total Service	**38 (32.7%)**	**47 (27.0%)**	**48 (28.1%)**	**33 (31.1%)**	**166 (29.3%)**
Food & Drink Establishments					
Restaurant	9	14	5	7	35
Take-away	4	3	3	6	16
Café/Sandwich Bar	4	8	9	3	24
Pub/Club	0	6	3	3	12
Total Food & Drink Establishments	**17 (14.7%)**	**31 (17.8)**	**20 (11.7%)**	**19 (17.9%)**	**87 (15.3%)**
Non A Class	1 (0.9%)	2 (1.2%)	8 (4.7%)	8 (7.5%)	19 (3.4%)
Vacant	8 (6.9%)	2 (1.2%)	15 (8.8%)	8 (7.5%)	33 (5.8%)
TOTAL	**116**	**174**	**171**	**106**	**567**

Banstead Village



Commentary

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

Vacancies & New Occupiers

Within the last twelve months there has been a noticeable increase in the number of vacant units within Banstead Village. There are currently eight vacant units, an increase from four recorded in the previous monitor. This has led to an increase in the percentage of vacant frontage (from 2.4% to 5.0%) and vacant net retail floorspace (from 1.8% to 4.3%). These figures are now around the borough's 5% threshold requirement whereas in previous year's monitors they have been much lower.

	Vacancy Rate
% of units	6.9%
% of frontage	5.0%
% of net retail floorspace	4.3%

Since the last monitor was produced there have also been a large number of occupier changes as six new occupiers have moved into the town centre: three have moved into previously vacant units and three have moved into previously occupied units. Also, one occupier, Brush Hair, has relocated to a larger unit and another occupier, Lotus Room, is under new management and has changed from a restaurant to a take-away.

Vitality

Table 4 illustrates the retail offer within Banstead town centre. It details that the greatest number of units (33.6%) are occupied by comparison uses followed by services (32.7%). The table also illustrates that in terms of floorspace, convenience retail takes up the majority of the retail floorspace accounting for nearly one third of all units. This is followed by comparison with 25.6% of floorspace.

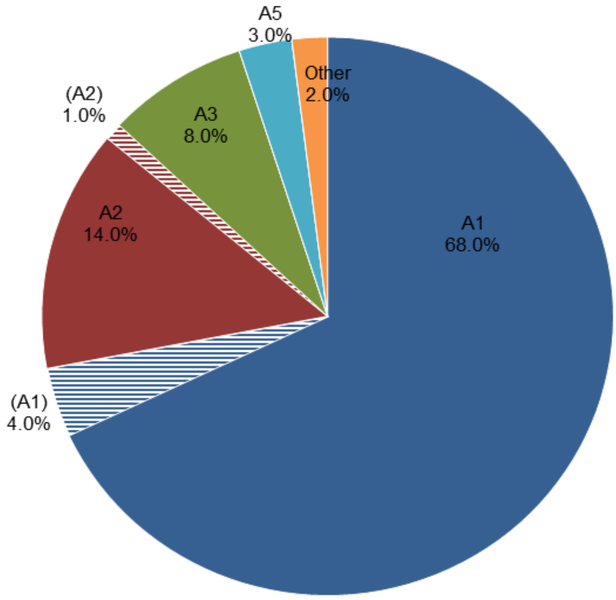
When comparing Banstead town centre floorspace use to the other town centres it is noted that Banstead once again has the highest proportion of service floorspace at 20%. This reflects the centre's primary role as a local centre serving the needs of the local population, as opposed to providing 'destination' retail. Banstead also has the greatest percentage of vacant floorspace (4.3%).

Table 4 Retail Offer

	Units	Net Floorspace (sqm)
Comparison	39 (33.6%)	3,154 (25.6%)
Convenience	13 (11.2%)	4,038 (32.8%)
Service	38 (32.7%)	2,493 (20.3%)
Food & Drink Leisure	17 (14.7%)	1,883 (15.3%)
Non-Retail	1 (0.9%)	210 (1.7%)
Vacant	8 (6.9%)	525 (4.3%)
Total	**116**	**12,297**

Figure 8 illustrates that primary retail uses (A1-A5) dominate Banstead's total retail frontage, accounting for over 98% of the total frontage. Specifically A1 retail makes up 72% of the frontage, a slight increase from 71% recorded in the previous monitor, however this is still below the 75% threshold requirement set out in the Borough Local Plan.

Figure 8 Breakdown of Use Classes (Frontage)



Development & Use Class Changes

Since the last monitor was produced there has been no major development. However, three planning permissions are currently under construction:

- 13/01260/CU: 46 High Street: Partial change of use from B8 to C3 reducing commercial floorspace by 220sqm
- 14/00436/F: 49 High Street: Singe storey extension providing an additional 16sqm of floorspace
- 14/01427/F: 109 High Street: Single storey extension to increase floorspace by 17sqm. This unit is newly vacant suggesting that work may start soon.

There are also a number of outstanding planning permissions which if developed would provide an additional 854sqm of commercial floorspace:

- 12/02085/F: 150 High Street: Extension to provide an additional 728sqm of floorspace
- 12/02101/F: 89 High Street: Demolition of existing single storey A1 unit and construction of a new three storey building plus basement, comprising A1 retail unit and residential. Increase of commercial A1 floorspace of 92sqm. This unit has been vacant for the past two years however work has not yet been started.
- 13/02290/CU: 73 High Street: Single storey extension providing an additional 9.9sqm of floorspace
- 14/00843/PJP: 10a High Street: Change of use from B1(A) to C3 reducing commercial floorspace by 65sqm
- 14/02286/F: 59 High Street: Single storey extension to provide an additional 56sqm of floorspace. This unit is newly vacant suggesting that work may start soon.
- 14/02053/F: 125 High Street: Rear extension to increase floorspace by 43sqm

Frontages

Figure 9 details the retail frontage of the Banstead town centre. It shows that Banstead continues to have a strong A1 retail frontage. Within the last twelve months there has been no change to the A1 retail threshold for Frontages A, B, E and F. However, Frontage D has seen a slight increase from 75.2% to 76.5% due to the change of use of one unit and Frontage C has seen a decline in the percentage of A1 retail from 72.9% to 64.5% due to the closure of an A1 unit and the opening of an A2 unit.

Figure 9 Banstead Frontage A1 Retail Trend (2004 - 2015)

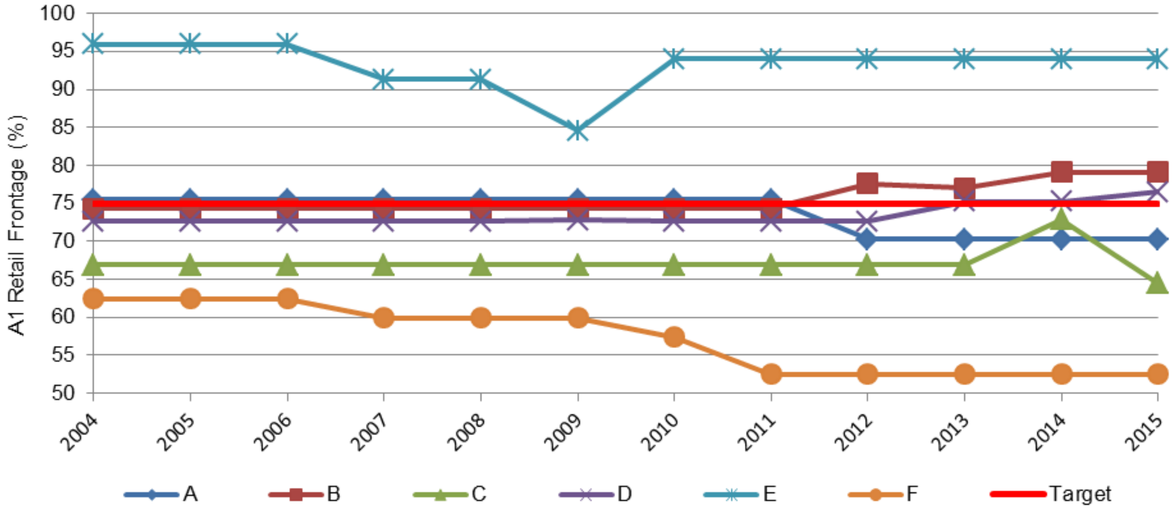
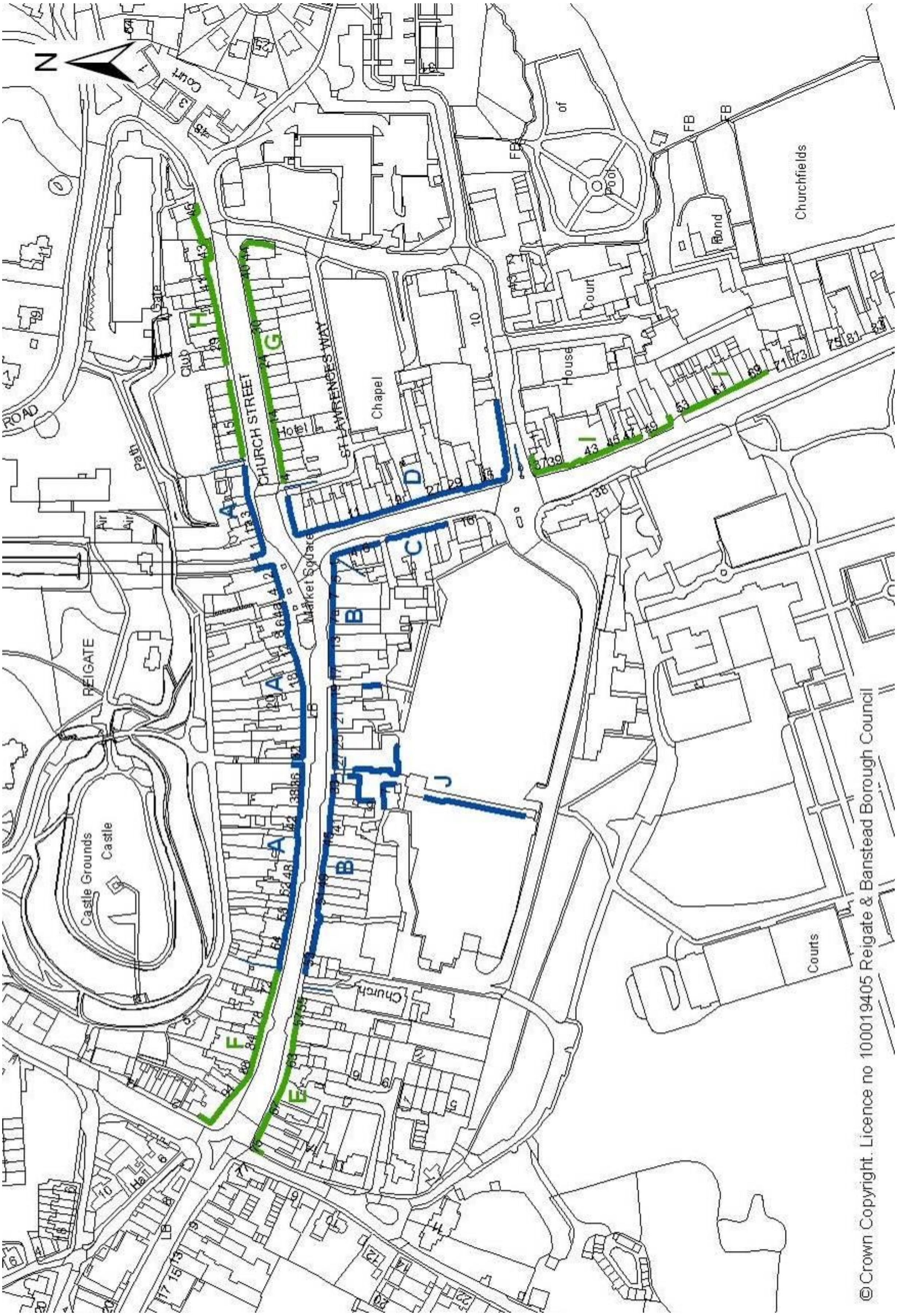


Figure 9 illustrates that Frontages B, D and E all continue to exceed the 75% threshold requirement, specifically Frontage E which continues to have 94% A1 retail within its frontage, this is predominantly made up of Waitrose which has helped to maintain a strong frontage. Once again frontage F falls considerably below the A1 requirement due to having a number of large fronted A2 and A3 units.

Reigate Town Centre



Commentary

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

The three main shopping streets are oriented around the attractive focal point of the Old Town Hall. Reigate Town centre has a vibrant mix of independent boutique clothing units, complemented by a good selection of cafés and restaurants. The centre has two food stores, the smaller Marks & Spencer store 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 significant reduction in the number of vacant units (from six to two) within the town centre which has led to noticeable reductions in the percentages of vacant units, vacant frontage and vacant net retail floorspace. The table below illustrates that the percentage of vacant units currently stands at 1.2%, a decline from 3.4% recorded in the previous monitor; that the percentage of vacant frontage has fallen from 2.7% to 0.6% and that the percentage of vacant net retail floorspace has fallen from 1.9% to 0.5%.

	Vacancy Rate
% of units	1.2%
% of frontage	0.6%
% of net retail floorspace	0.5%

Within the monitoring period there have been a large number of occupier changes as sixteen new occupiers have moved into the town centre, including one, Taylor Jayne who has expanded from a first floor office that was not included in the previous monitor into a unit and one, Bill's restaurant, who are currently remodelling a previously occupied restaurant – it is due to open on 27th April.

Of these sixteen new occupiers six have moved into previously vacant units and ten have moved into previously occupied units. One occupier, Nutritional Health, has also relocated to a larger premise within the town centre; their previous premise has been re-occupied. Two units have become newly vacant.

Vitality

As can be seen from table 5, Reigate town centre is predominantly comprised of comparison retail units (46%), followed by service retail units (27%) and that in terms of floorspace Reigate town centre is largely composed of comparison retail (39%), convenience retail (30%) and service retail (16%). The high percentage of convenience floorspace (28%) compared to units (7%) is due to Morrisons Supermarket occupying a large unit.

In comparison to the other town centres within the borough, Reigate has the greatest proportion of floorspace occupied by food and drink establishments. It does not however have the greatest percentage of units as Horley town centre has marginally more (17.9% compared to 17.8%). However whereas Horley has a greater number of takeaways, Reigate has a greater number of restaurants including a number of chains. Within the last twelve months three new food and drink leisure establishments have opened within Reigate town centre and one further unit that was previously an Indian restaurant is currently being remodelled to become Bills Restaurant. The majority of the food and drink leisure establishments within Reigate are located within the town's secondary frontage and many of them are of high quality and contribute to the vitality and active evening environment within the town centre.

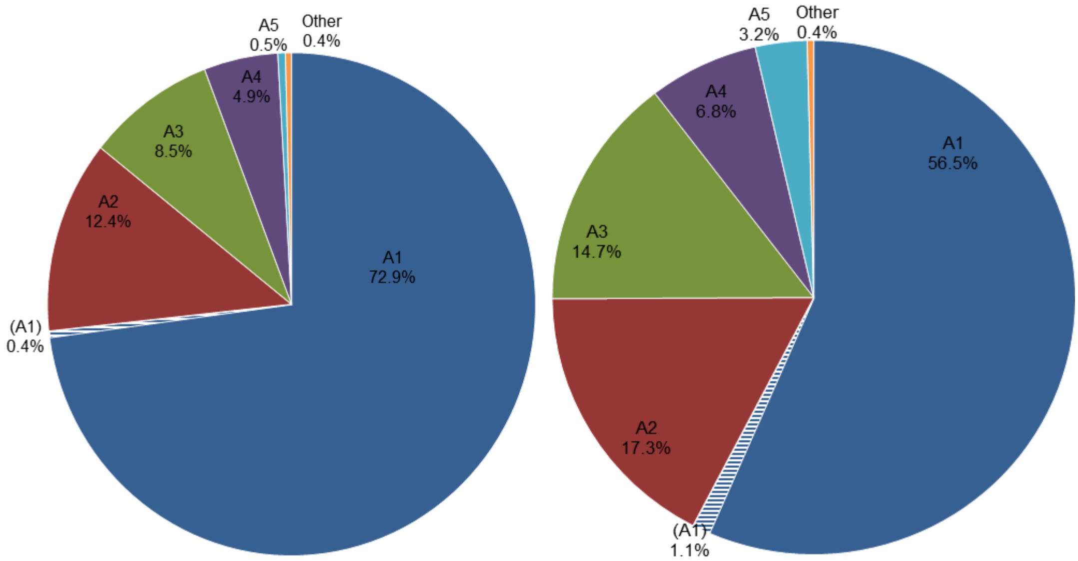
Reigate also continues to have the highest percentage of comparison units (46%) and the second highest proportion of comparison retail floorspace after Redhill (Redhill has 52% floorspace whilst Reigate has 39%). This is largely due to Reigate having a high volume of smaller boutique shops selling specifically Home & DIY, gifts, clothing, footwear and accessories whilst Redhill has a greater number of national chain stores in larger units in particular in the Belfry. This reflects the different roles of the town centres within the borough.

Table 5 Retail Offer

	Units	Net Floorspace (sqm)
Comparison	80 (46.0%)	7,717 (38.9%)
Convenience	12 (6.9%)	5,548 (27.9%)
Service	47 (27.0%)	3,264 (16.4%)
Food & Drink Leisure	31 (17.8%)	3,112 (15.7%)
Non-Retail	2 (1.2%)	0 (0.0%)
Vacant	2 (1.2%)	92 (0.5%)
Total	**174**	**19,859**

As can be seen from Figure 10, over 99% of Reigate's town centre primary and secondary frontage is occupied by A1-A5 retail. However, both the primary and secondary frontages fall below the A1 threshold set out in the local plan, with primary frontage having around 73% (against 80% target) and the secondary frontage making up 58% (against 66% target).

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



Development & Use Class Changes

Since the last monitor was produced there has been no new development within Reigate town centre. However, there is currently one planning permission (1300281/CU) under construction for 16 Bell Street for a change of use from B1(A) to A2/B1(A)/D1.

There are also a number of outstanding planning permissions which if developed would increase commercial floorspace by 180sqm.

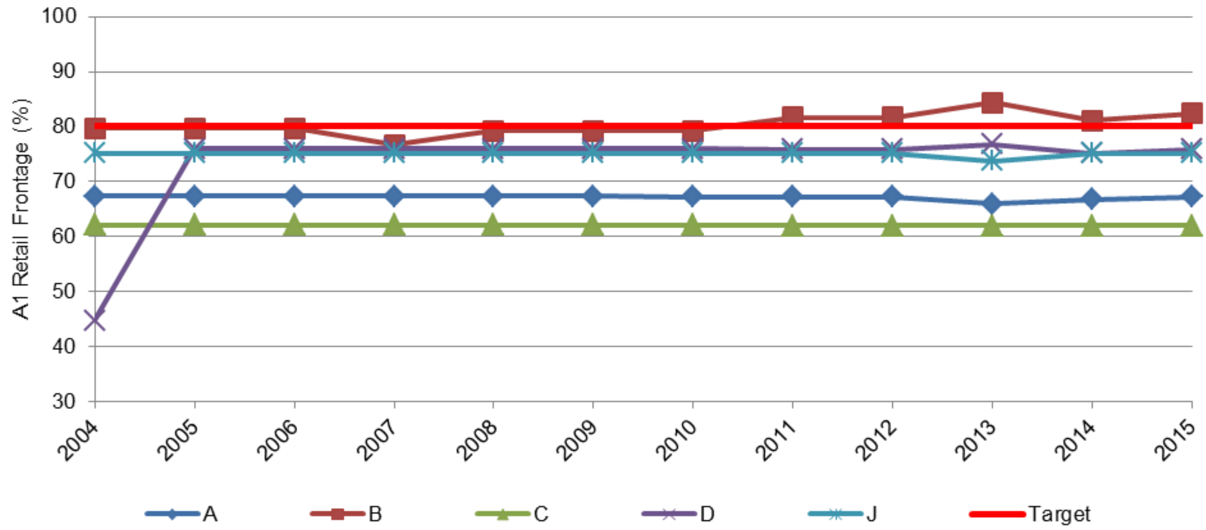
- 14/00407/F: 4-10 Church Street: Extension to ground floor units and conversion of upper floor units into 11 residential dwellings

Frontages

Primary

Frontage B (81%) continues to be the only primary frontage to exceed the 80% threshold for A1 retail although D and J are near the threshold (both 75.1%). Within the last twelve months there has been no change in the percentage of A1 retail for frontages C and J. Frontages A and C continue to fall below the A1 retail threshold and have done so for a number of years, this is largely due to the number of estate agents and banks found within these frontages.

Figure 11 Reigate Primary Frontage A1 Retail Trend



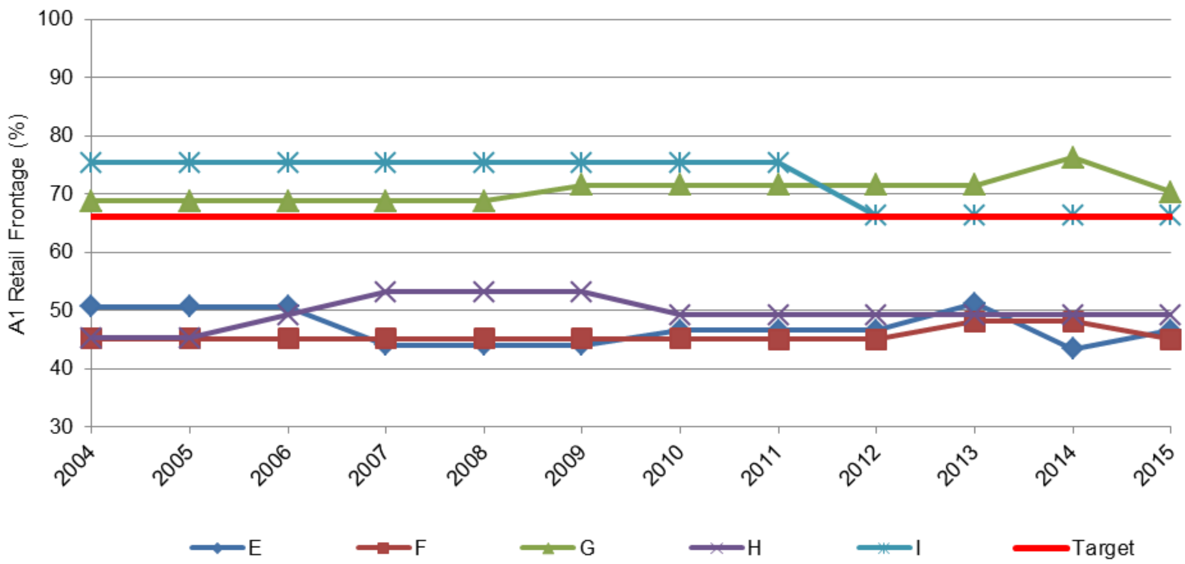
Secondary

Within the last twelve months there has been little change to the proportion of A1 frontage within the secondary frontages, again only frontages G and I exceed the 66% threshold whilst frontages E, F and H still fall below the target and have done so for the last few years.

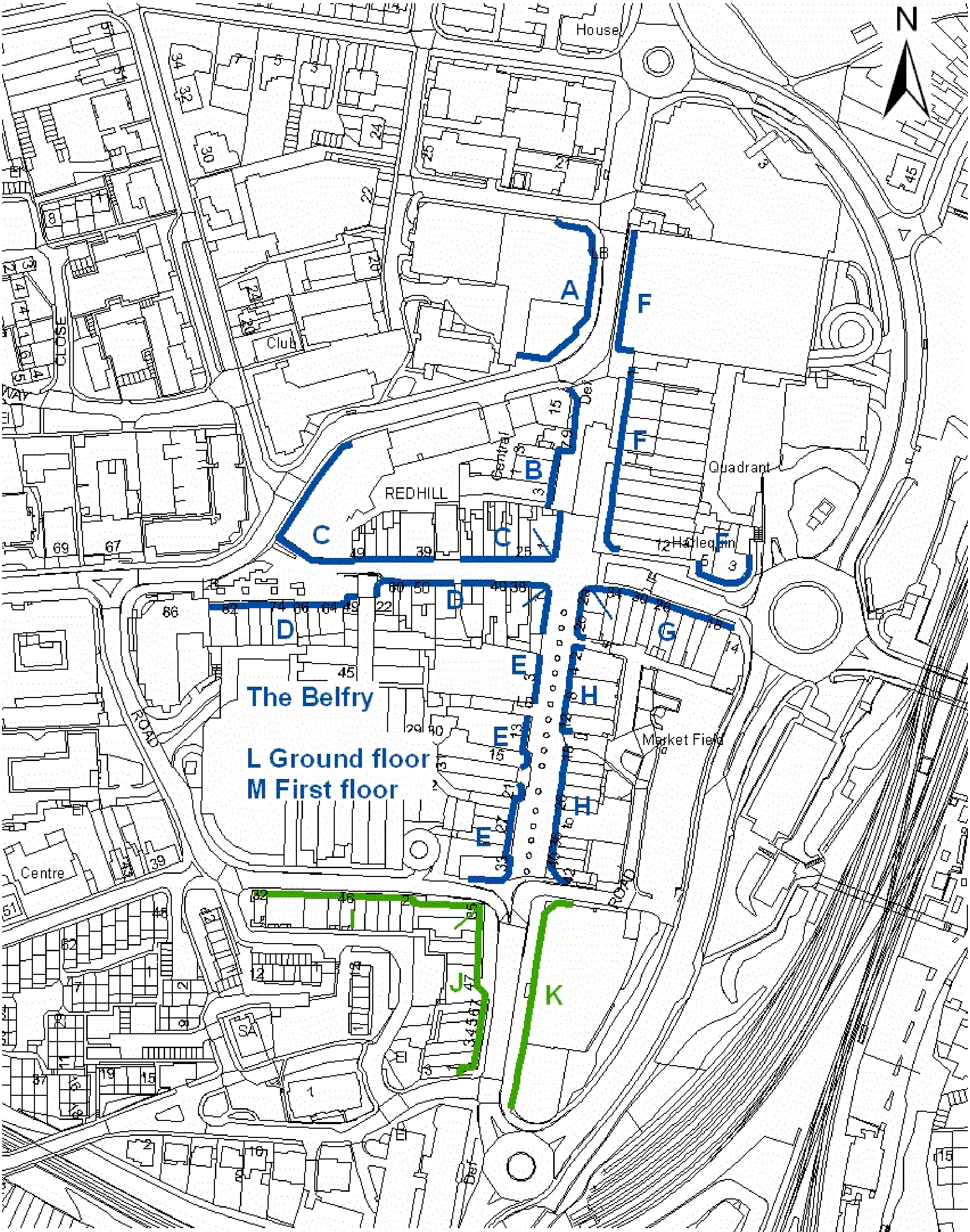
Since the last monitor was produced there has been a slight increase in the proportion of A1 units found in frontage E (43% to 46%) and a slight decrease in frontage F (48% to 45%) and G (76% to 70%). There has been no change to proportion of A1 units found in frontages H and I.

Frontages F and H have the lowest proportion of A1 units (45% and 49% respectively) due to having a high number of service and food & drink leisure premises.

Figure 12 Reigate Secondary Frontage A1 Retail Trend



Redhill Town Centre



Commentary

Redhill town centre is recognised as a major town centre by the Surrey retail hierarchy and seen as the primary town centre and regional hub of the borough of Reigate and Banstead. In terms of retail frontage it is the largest of the borough's town centres and retail activity is focussed around the main pedestrianized High Street which runs from north to south, with a series of smaller shopping streets running off of this. Redhill town centre is also home to the Belfry Shopping Centre and the Harlequin Theatre.

The regeneration of Redhill has continued to gather pace following from the redevelopment of Nobel House, which is now fully occupied. It has also recently seen the re-opening of Memorial Park following a £1.5million makeover and the introduction of a new traffic management system to ease congestion. Work has started on the Warwick Quadrant redevelopment which will include a larger Sainsbury's, a new gym, a 70 bedroom hotel and town centre car park and on the redevelopment of the former Liquid and Envy nightclub which will provide additional A1 retail space and 61 residential dwellings. Planning permission has been granted for redevelopment of the existing station buildings to provide a mixed use development comprising a new Waitrose supermarket, several smaller units, 150 residential dwellings and improvements to the public realm.

Vacancies & New Occupiers

Within the last twelve months there has been a significant reduction in the number of vacant units within Redhill town centre, from 22 to 15. This has led to a significant reduction in the percentage of vacant frontage (13.4% to 6.3%) and percentage of net vacant floorspace (6.2% to 4.3%). Despite this, when comparing Redhill town centre to the other town centres, Redhill continues to have the greatest percentage of vacant units.

	Vacancy Rate
% of units	8.8%
% of frontage	6.3%
% of net retail floorspace	4.3%

Within the last year eleven new occupiers have moved into Redhill town centre: eight of these have moved into previously vacant units, two have moved into previously occupied units and one has moved into a newly constructed unit that was vacant in the last monitor.

There are currently fifteen vacant units within Redhill town centre: fourteen of which have been vacant for over one year. This emphasises the need to monitor retail performance in the town centre to ensure it maintains its vitality and main function, as a primary town centre

Vitality

Table 6 illustrates that Redhill town centre is predominantly comprised of comparison retail units (39%) and floorspace (52%). When comparing the town centres, Redhill continues to have the greatest proportion of comparison retail floorspace. This is expected due to Redhill being the primary retail destination of the borough and thus it having the largest representation of multiple retailers, particularly within the Belfry Shopping Centre, such as Marks and Spencer's and Waterstones.

Conversely, Redhill has the lowest proportion of food and drink leisure units and floorspace. Within Redhill food and drink leisure floorspace makes up around 12% units and 8% floorspace compared to 18% units and 16% floorspace within Reigate. The quality and range of food and drink offer is also recognised as being poor.

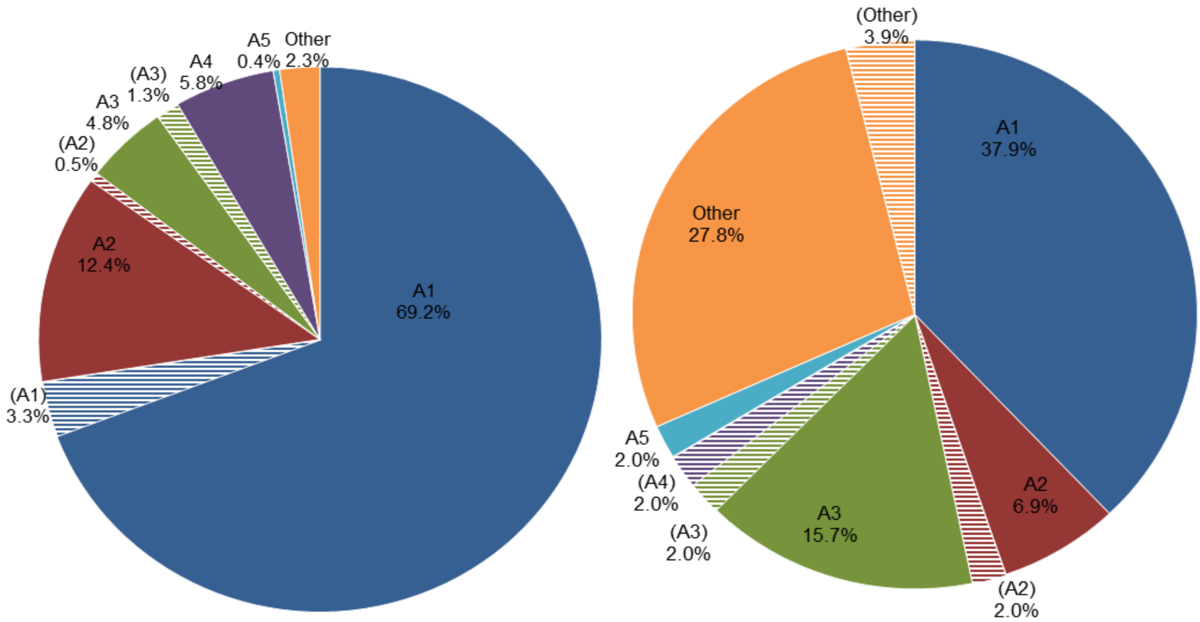
Table 6 Retail Offer

	Units	Net Floorspace (sqm)
Comparison	66(38.6%)	20,726 (52.2%)
Convenience	14 (8.2%)	8,486 (21.4%)
Service	48 (28.1%)	4,904 (12.3%)
Food & Drink Leisure	20 (11.7%)	3,230 (8.1%)
Non-Retail	8 (4.7%)	929 (2.3%)
Vacant	15 (8.8%)	1,465 (3.7%)
Total	**171**	**39,740**

As can be seen from Figure 13, Redhill town centre retail (A1 to A5) uses constitute around 98% of the primary frontage and 68% of the secondary frontage. Both the primary and secondary frontages miss the A1 requirement, with primary frontage having 73% (against 80% target) and the secondary frontage only having 38% (against 66% target). The town's secondary frontage is predominately made up of office frontage and includes Kingsgate, which was previously retail frontage.

Within the last twelve months there has been a noticeable decline in the proportion of vacant A1 frontage within the primary frontage (from 10% to 3%). This is due to six previously vacant units being occupied by A1 use.

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



Developments & Use Class Changes

During the last twelve months there has been no new development completed within Redhill town centre. There is however a number of outstanding planning permissions which are yet to be implemented.

- 12/01851/F: 42 Station Road: Single storey extension to increase SG floorspace by 8sqm
- 13/00848/F: Redhill Railway Station: Redevelopment to provide a new Waitrose food store, several smaller A1/A2/A3 retail units, 150 residential units and improvements to the public realm
- 14/00763/CU: 26-28 Station Road: Change of use from B1(A) to C3 resulting in a loss of 428sqm commercial floorspace
- 14/02016/P3JPA: 22 Station Road: Change of use from B1(A) to C3 resulting in a loss of commercial floorspace of 113sqm
- 14/02497/CU: 54 Station Road: Change of use from SG to A2

There are also two large planning permissions which are currently under construction proposing extensions and changes of use in Redhill town centre:

- 12/01852/F: Sainsbury's London Road: Redevelopment to provide an additional 13,968sqm of A1 retail space to the existing food store, a gym, a 70 bedroom hotel and improvements to the public realm and townscape. It will contribute to the regeneration of Redhill.
- 13/00420/F: Former Liquid and Envy Nightclub: Redevelopment to provide a mixed use development comprising 355sqm of A1 retail space, 61 residential dwellings and associated parking and landscaping.

Frontages

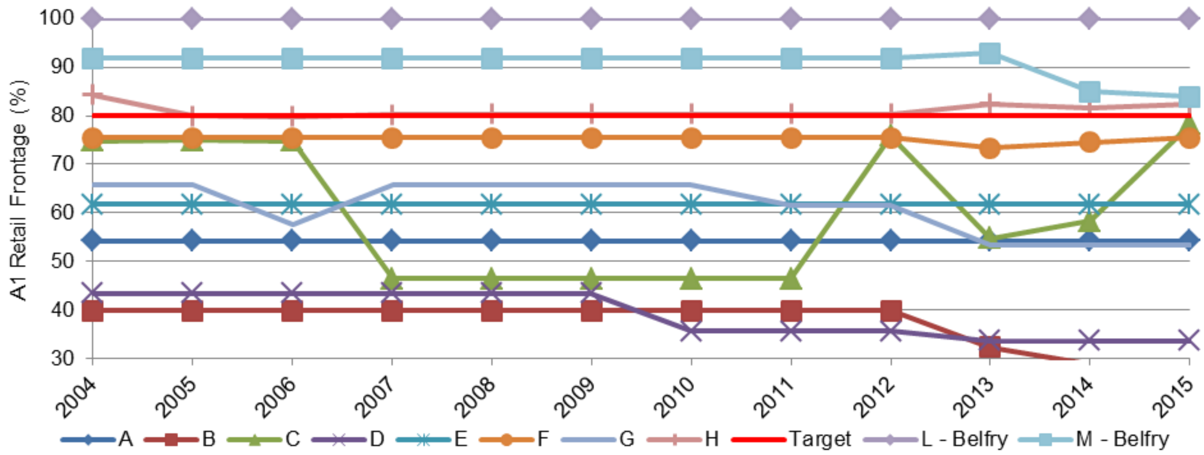
Primary

Within the last twelve months there has been very little change to the proportion of A1 retail found within Redhill's primary frontage: frontages A, B, D, E, G and L have all seen no changes; F and H have seen minor increases; and C has seen a large increase due to a large previously vacant unit becoming occupied.

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

As has been the case for the last six years, frontages H, L and M all exceed the 80% primary A1 retail threshold whilst frontages C and F continue to fall just below (78% and 76% respectively). The remaining primary frontages continue to fall considerably below the 80% primary A1 retail threshold; in particular frontages B and D are of particular concern as they both consist of less than 50% A1 retail frontage. Frontage B suffers from a high proportion of A2 financial and professional services premises, whilst Frontage D has an extremely diverse mix comprising; A1, A2, A3, A4 and Sui Generis uses.

Figure 14   Redhill Primary Frontage A1 Retail Trend

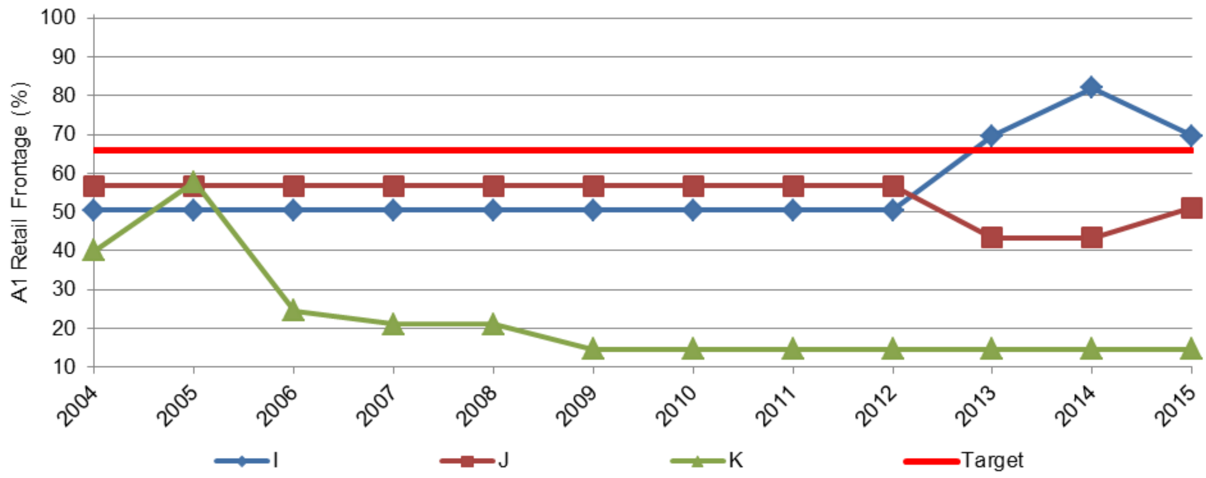


Secondary

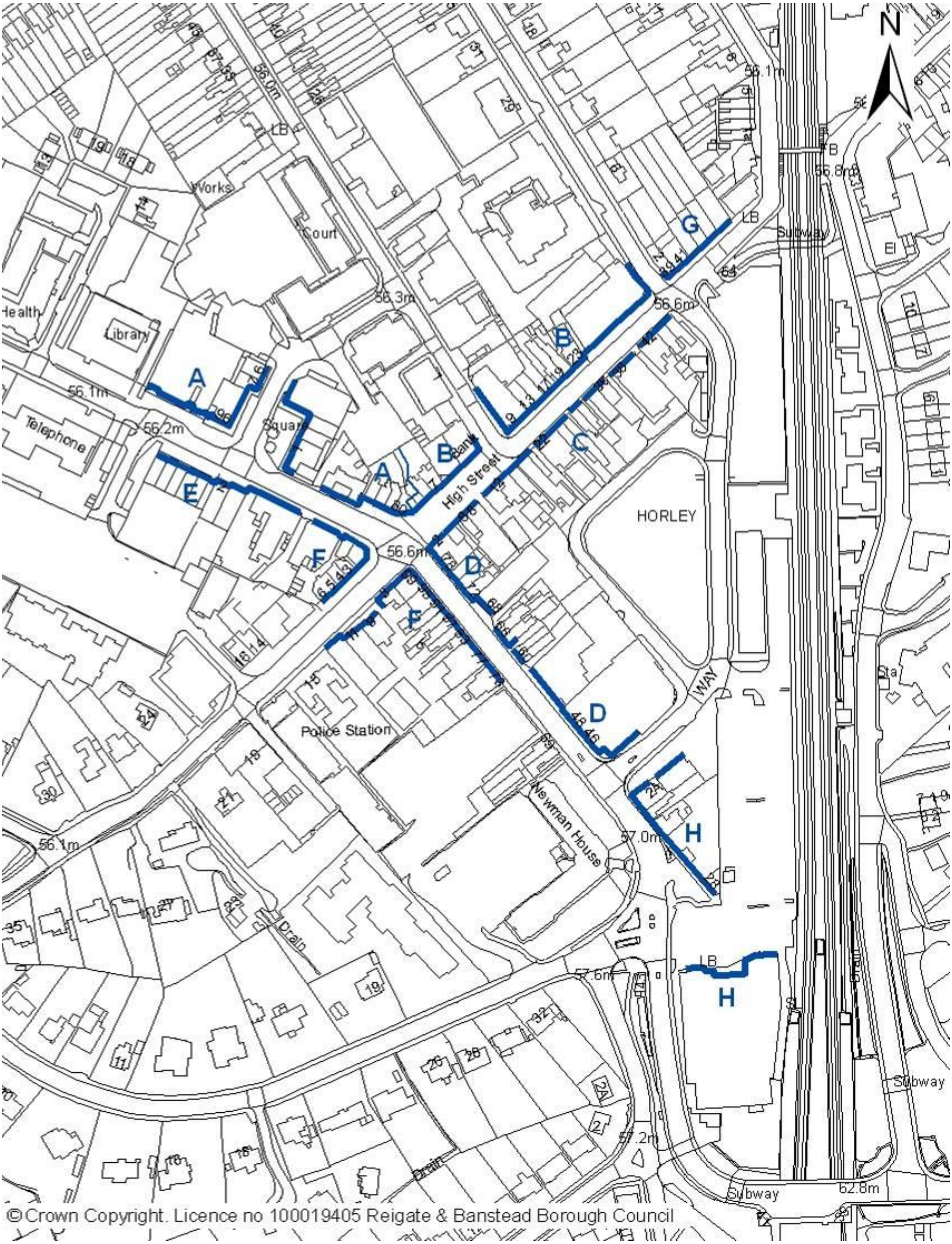
Within the last twelve months the proportion of A1 retail within frontage K has remained unchanged whilst frontages I and J have seen changes. The proportion of A1 retail within frontage I has declined from 82% to 70% due to a previously vacant unit being occupied by a B1 use; and the proportion of A1 retail has increased from 43% to 51% in frontage J due to two new A1 occupiers moving into this frontage.

Frontage I remains the only secondary frontage to exceed the 66% A1 retail requirement at 70%. Conversely, frontages J & K continue to fall below this with 51% and 15% respectively. Frontage K has a low proportion of A1 retail due to Kingsgate and Red Central office developments replacing previous retail frontages with office frontage. As part of the Development Management Policies, retail frontages will be reviewed including whether it remains appropriate to consider area K as part of the retail frontage.

Figure 15 Redhill Secondary Frontage A1 Retail Trend



Horley Town Centre



Commentary

Horley town centre is located at the southern end of the borough; it is a compact district centre consisting of several shopping areas orientated around the junction of Victoria Road and High Street. The main parade on High Street is pedestrianized; towards the north there is a large Morrisons Local convenience store and towards the south a large Waitrose supermarket and a large independent department store. The centre benefits from Horley railway station lying just below the south of the shopping area.

The recent economic downturn hit Horley hard, it saw a number of local businesses disappear and an increased level of vacancies. Subsequently the town centre has been awarded government funding to help boost and improve the vitality of the town centre from the 'High Street Innovation Fund'.

There are currently a number of ongoing regeneration projects within Horley town centre including significant public realm improvements to the High Street and Victoria Road; improved footways from the station; the provision of a improved pedestrian crossing facilities; the installation of new street lighting and public realm improvements in various locations throughout the town centre; and the redevelopment to the old Newman House site to provide a high quality mixed use development of new homes and commercial floorspace.

Vacancies & New Occupiers

Within the last twelve months there has been an increase in the number of vacant units within Horley town centre, from seven to eight. This has led to a subsequent increase in the percentage of vacant frontage (6.0% to 6.5%) but has not led to an increase in the percentage of vacant floorspace. The percentage of vacant floorspace has instead declined from 3.3% to 2.5% due to new occupiers moving into four large previously vacant units and due to four smaller units becoming vacant.

	Vacancy Rate
% of units	7.7%
% of frontage	6.5%
% of net retail floorspace	2.5%

Within the monitoring period there have been a number of occupier changes within Horley town centre as six occupiers have moved into the town centre. Of these six new occupiers five moved into previously vacant premises and one moved into a previously occupied unit. One further occupier has relocated to a larger premise within the town centre. Conversely, within this period seven occupiers have left the town centre.

Vitality

As can be seen from table 7, Horley town centres units are predominantly comprised of comparison retail (24%) and service retail (31%) and the town centre's floorspace is predominantly occupied by convenience (37%) and comparison retail (30%). The high percentage of convenience floorspace (37%) compared to convenience units (12%) is due to two supermarkets occupying large units within the town centre. When comparing the town centres, Horley once again has the highest percentage of convenience floorspace.

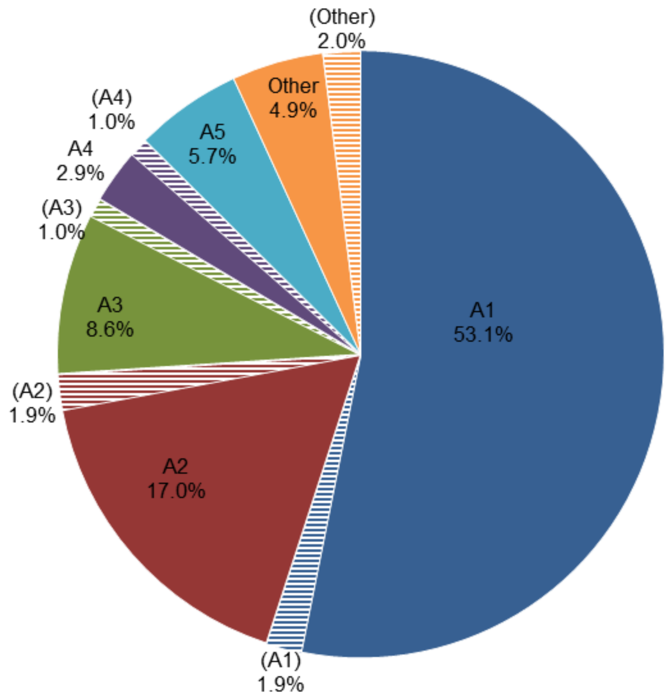
Within the last twelve months the high percentage of convenience and comparison floorspace has remained unchanged. This is not surprising given the town centre's primary role as a district centre serving the needs of the local population. Nor is it surprising given that Horley town centre has the highest proportion of takeaways and charity shops compared with the other three town centres. Within the last twelve months one further restaurant/takeaway has occupied two previously vacant units, this highlights the need for continual monitoring as it could potentially affect the long term viability of the town centre in terms of an appropriate mix.

Table 7 Retail Offer

	Units	Net Floorspace (sqm)
Comparison	25 (23.6%)	5,062 (29.7%)
Convenience	13 (12.2%)	6,356 (37.3%)
Service	33 (31.1%)	2,756 (16.2%)
Food & Drink Leisure	19 (17.9%)	1,968 (11.6%)
Non-Retail	8 (7.5%)	461 (2.7%)
Vacant	8 (7.5%)	421 (2.5%)
Total	**106**	**17,024**

As can be seen from Figure 16 the majority of Horley's retail frontage is in A1- A5 use (93%) with over half being in A1 use (55%). However, within the last twelve months the proportion of occupied A1 frontage has declined from 55% to 53%.

Figure 16 Breakdown of Frontage by Use Class



Developments & Use Class Changes

Since the last monitor was produced no new development within Horley town centre has been completed however two planning permissions are currently under construction:

- The redevelopment of Newman House which will provide 90 affordable residential units and 4/5 retail/restaurant units (A1/A2/A3 use) is under construction and nearing completion.
- 14/01304/F: 18-20 High Street: Partial demolition of rear single storey building and replacement with three storey extension comprising residential units leading to a 98.5sqm reduction in A1 floorspace.

There are also two outstanding planning permissions which if developed would lead to losses of office space:

- 14/00913/P3JPA: 80-82 Victoria Road: Change of use from B1(A) to C3 resulting in a loss of 170sqm commercial floorspace
- 14/00317/F: Saxley Court, 121-129 Victoria Road: Change of use from B1(A) to C3 resulting in a loss of 1063sqm commercial floorspace

Just outside of the town centre on Consort Way there two planning permissions have been granted to convert office buildings Oakfield House and Consort House into residential dwellings. These have been permitted under temporary permitted development rights which came into effect in 2013 and allowed a change of use from B1(A) to C3 providing completion by 30th May 2016.

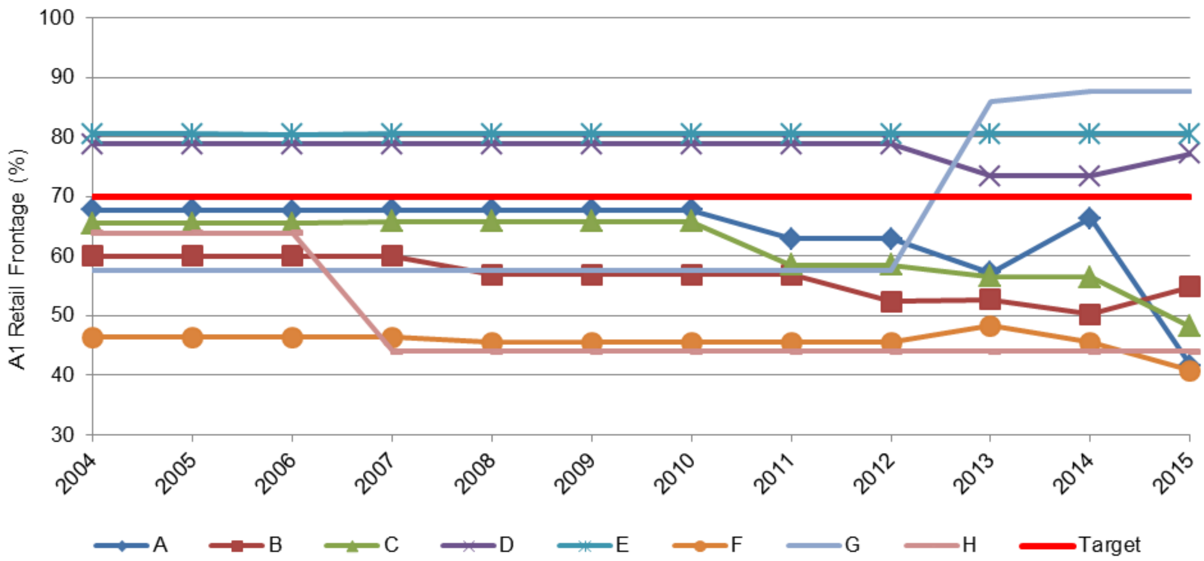
Frontages

Within the last twelve months the proportion of A1 retail within frontages E, G and H has remained unchanged and frontages B and D have seen increases: frontage B has increased from 50% to 55% due to a new A1 occupier moving into the frontage and an A3 premise vacating the frontage; and frontage D has increased from 73% to 77% due to a large A2 unit vacating their premise.

Conversely, frontages A, C and F have seen decreases. Frontage A has declined from 66% to 42% due to three previously vacant premises being occupied by non-A1 uses; Frontage C has declined from 57% to 48% due to two previous A1 units vacating their premise, a previously vacant unit being occupied by a non-A1 use and one new A1 unit occupying a previously vacant unit and; and Frontage F has seen a slight decline from 46% to 41% due to the loss of one A1 premise and one new A2 unit moving into the frontage.

As has been the case since 2013, frontages D, E and G continue to exceed the 70% A1 retail frontage target and frontages B, C, F and H continue to fall below this target, the lowest being 41% found at frontage F due to a number of estate agents, restaurants and takeaways being located in this frontage.

Figure 17 Horley Frontage A1 Retail Trend



Appendix

Survey Notes

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

Measurements of shop frontages are obtained using the following rules:

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

Definitions

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

Use Classes Order

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

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

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

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

Full occupier schedules for each of the town centres 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 (Bi-annual)

Population and Demographic Information

These publications are available on the Council website:

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

Search for: *"monitors":*

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

Planning Policy Team

Tel: 01737 276000

Email: LDF@reigate-banstead.gov.uk