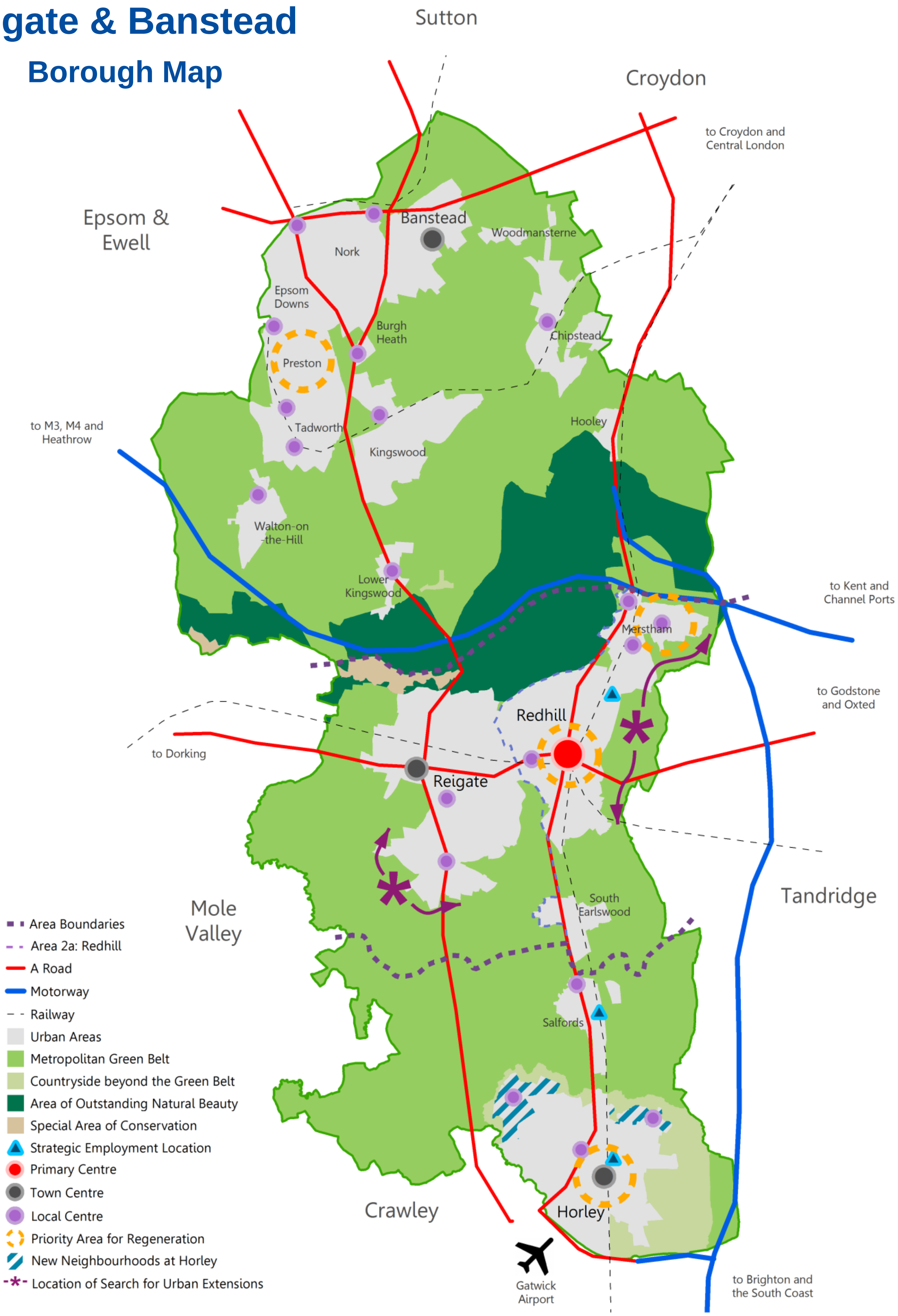
Town Centre Monitor

September 2013

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

Reigate & Banstead

Borough Map



Town Centre Monitor

Position at the end of September 2013

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 September 2013. 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 and emerging Core Strategy and Development Management Plan (DMP) policies
- 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, is in the process of being replaced by new local planning documents. Following the Council's Core Strategy hearing in May 2013, the Council made some further modifications and further consultation was carried out between July and August 2013. It is likely that the Inspector will wish to add one further hearing session in December 2013 to address responses to the further modifications.

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 emerging 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

There are 563 units in the borough's four town centres. Together, these units provide a total net retail floorspace of almost 90,000 sqm and have a frontage length of more than 5,340 metres.

In terms of floorspace, almost half (45%) is in Redhill, highlighting its position as the borough's primary town centre. Reigate has 22% of the floorspace followed by Horley (19%). Banstead is the borough's smallest town centre and accounts for 14% of the total retail floorspace. Just over 30% of units are located in Redhill Town Centre with a similar proportion in Reigate Town Centre. The remainder are split relatively evenly between the two smaller town centres at Banstead and Horley.

Figure 1 Distribution of Town Centre Units & Floorspace

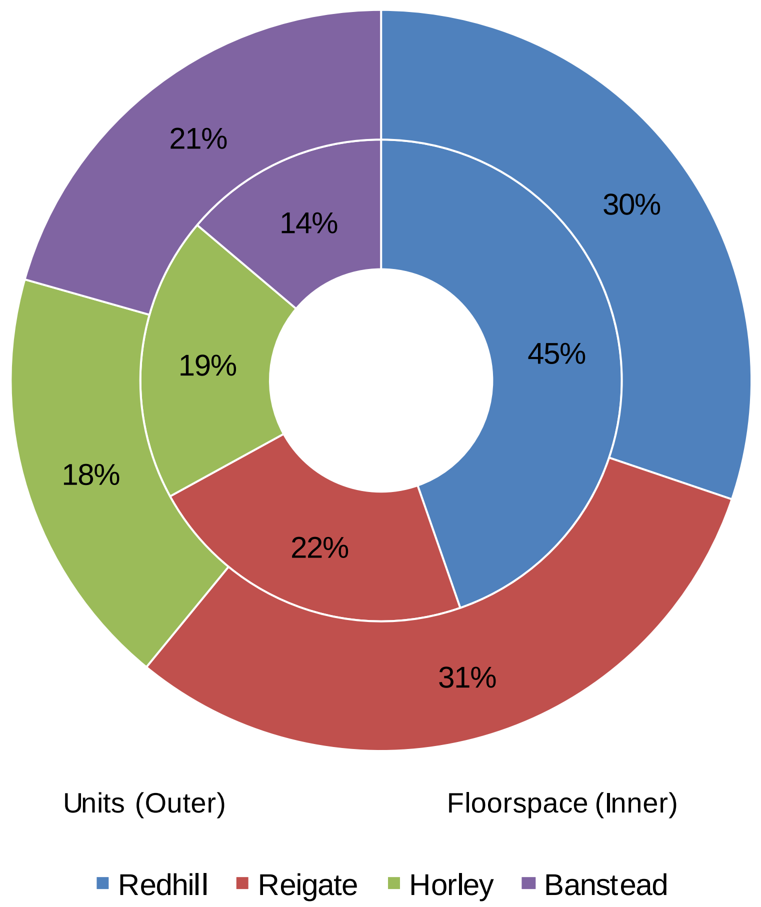
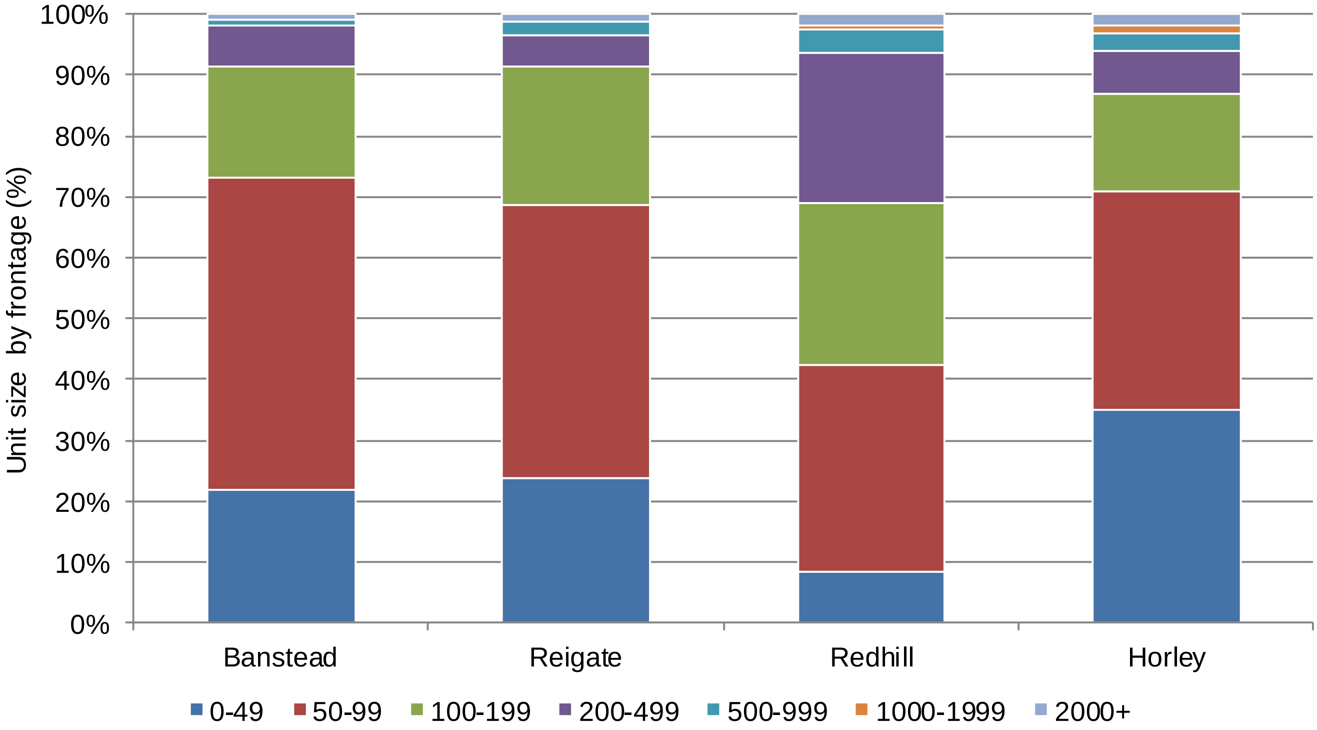


Figure 2 below shows the variation across the borough's 4 town centres, in terms of unit size (as determined by net retail floorspace). Redhill has the highest percentage of retail units of 100sqm or larger accounting for 58% of all units, given the centre is a major retail destination in the borough. The other 3 town centres (Banstead, Reigate & Horley) are predominately made up of smaller units under 100sqm at 73%, 69% and 71%, respectively. This largely reflects their more local retail offer which has an impact upon their retail unit size.

Figure 2 Breakdown of Town Centre Units by Frontage Length



Overall Trends – Key Messages

National Retail Trends

According to the latest report published by the British Retail Consortium there were approximately 189,280 VAT registered retail enterprises in the UK in 2012, operating in 287,100 retail outlets. Both figures show an increase in the total number of VAT registered businesses and operating retail outlets compared to 2011. Total sales for 2012 were over £311 billion, an increase from 2011 figures. Despite this growth over the past year, the long term predictions for the retail premises remain uncertain. For example, 9% of retail sales over the last year came from internet based purchases, demonstrating the increasing pressure and competition facing High Street stores.

The latest figures released by the Office for National Statistics (ONS) (August 2013) found that spending in the retail industry was £27.9 billion, a significant increase from £26 billion recorded in the previous year. Findings show that retail sales were 2.1% higher compared to August 2012 when consumer spending was affected by the Olympics. Online retail spending increased by almost 11% between July 2012 and July 2013 and is largely due to changing consumer spending patterns. Food stores saw food sales peak throughout July 2013 due to the prolonged good weather, before falling again in August 2013.

Research carried out by the Local Data Company (LDC) shows that the retail industry remains subdued. There are approximately 52,000 empty retail and leisure premises across the UK, with an average national vacancy rate of around 14% and has been the case since 2010. There is significant variation in vacancy rates across the country with the lowest vacancy rate (9.4%) recorded in London compared to the North West which has the highest rates of 20%. In this year alone a total of 39 high street retailers failed(such as Modelzone, Blockbuster, etc) The recently published 'Grimsey Review' stated that more needs to be done to tackle the underlying issues faced on the failing high streets. Further changes are being proposed by the government to extend permitted development rights. If implemented, this will enable existing retail units to be converted into residential units without planning permission. This is likely to have a significant impact on town centres and high streets across the UK. A review of local retail and shopping centre policies will also be undertaken as part of the DMP.

Borough Key Messages

- **Vitality:** A1 retail remains the main use within the borough's town centres; however, the proportion in all four town centres is below the required level set out in Policy Sh8 of the Local Plan. In general, the proportion of retail categories on offer across the 4 centres has stayed the same, with the exception of food & drink establishments which have increased in the last 6 months. These premises account for around 14% of A3-A5 uses found within the town centres. All four of the borough's town centres have a proportion of A1-A5 retail frontage in excess of 96%.
- **Retail Uses:** Comparison retail still makes up 38% of all units within the borough's four town centres. The majority of this comparison retail is clothing, footwear and accessories premises, which occupy more than 12% of retail units. The composition of each of the town centres suggests they are well matched to fulfill their individual role within the hierarchy as evident in Banstead and Horley, which both have a higher proportion of convenience and service based retail, whilst Reigate and Redhill have predominately comparison based retail.
- **Vacancy Rate:** There are currently 35 vacant retail units (6.2%) across all the 4 town centres, the same number as recorded in the previous monitoring period. the vacancy rate in Banstead and Reigate still remains below the borough's 5% threshold; despite both centre's vacancy rates increasing in the last 6 months. Both Horley and Redhill saw a drop in their overall vacancy rates down to 7.7% and 10.6% respectively. Subsequently, total vacant

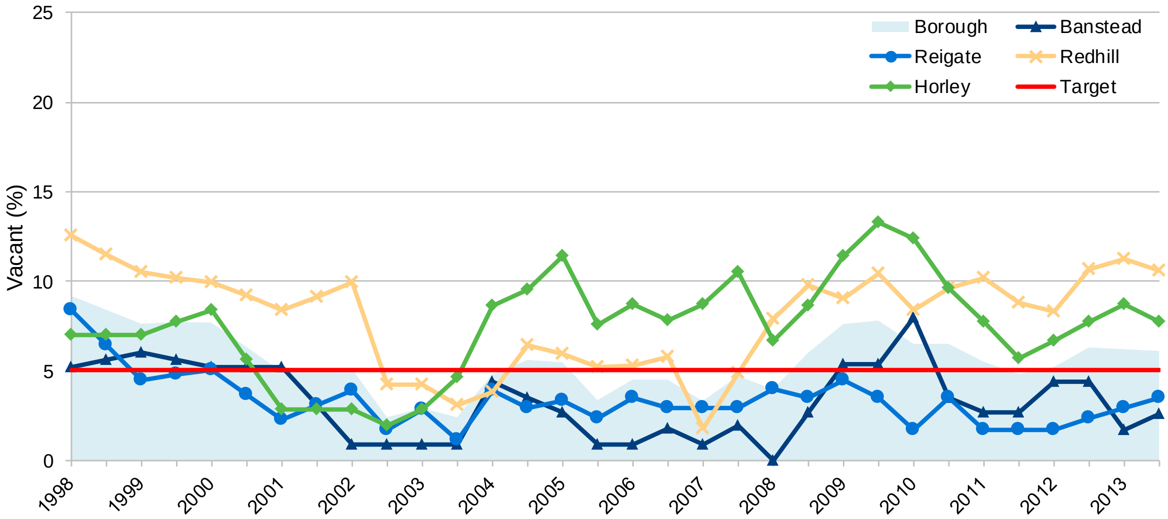
floorspace and frontage have also increased in the last 6 months to 5.1% and 7.1% respectively.

- **New Occupiers:** A total of 13 new occupiers moved into retail premises in one of the borough's four town centres whilst a further 2 occupiers are currently fitting out in retail premises in Reigate and Horley. The highest number of new occupiers moved into Reigate (5) town centre followed by Redhill (4).

Vacancies & New Occupiers

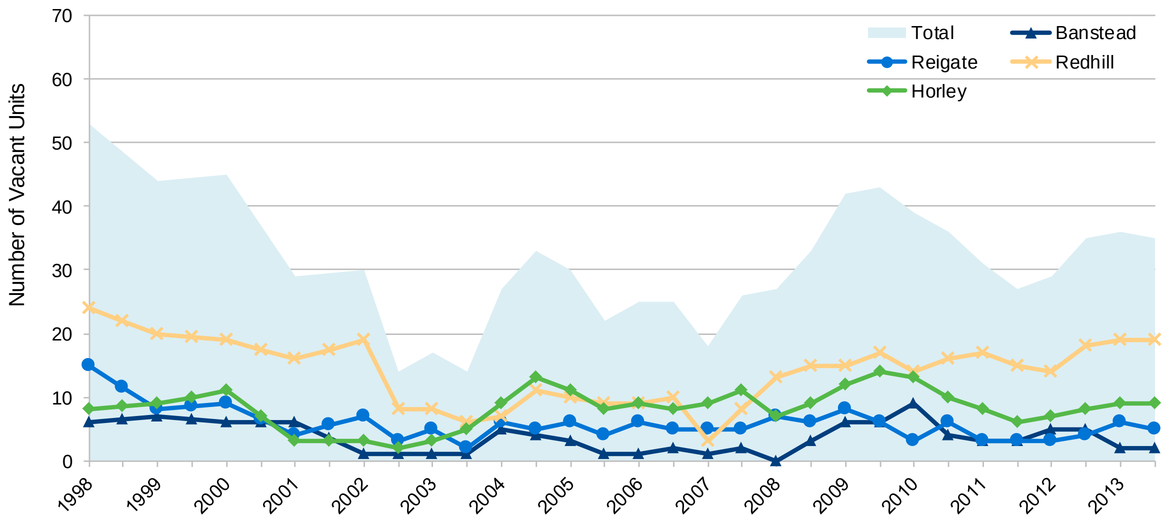
Vacancy Trend

Figure 3 Percentage Vacancy Rate (1998-2013)



The overall town centre vacancy rate across the borough has stayed at 6.2%. In spite of the ongoing challenges facing High Street retail, the level of vacancy in each of the borough's four town centres is still below the national average (14%). Since the last monitoring period, Horley and Redhill both saw a significant drop in their vacancy rates down to 7.7% and 10.6% respectively, whilst vacancy rates in Banstead and Reigate increased over the same period. Despite this, the vacancy rates for these two towns are still below the borough's 5% target and have been for a number of years.

Figure 4 Number of Vacant Units (1998-2013)



In the last 6 months there has been no change to the total number of vacant retail premises found across the borough's 4 town centres, which has stayed at 35. This will continue to be monitored as one indicator of the vitality of the borough's town centres. With a number of major developments anticipated in Redhill town centre shortly, vacancy rates may change over the next couple of years as regeneration work gets 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. Notwithstanding the marginal improvement in total vacancy rates, since the last monitoring period total vacant ground floor frontage has increased from 6.4% to 7.1%. Vacant retail floorspace has also increased in the last 6 months from 3,720sqm to 4,537sqm across the 4 town centres. The reason for this is that a significant proportion of the units becoming vacant during that period were of larger than average size. These included the former YMCA charity shop in Horley and Redhill Help Shop. The relocation of the Redhill Help Shop into the Harlequin (which is not included in the monitoring) has added to Redhill's total vacant retail floorspace (2,757sqm), which remains the highest out of all the 4 centres.

Table 1 below summarises the overall town centres vacancy position.

Table 1 Summary of Current Vacancy Position

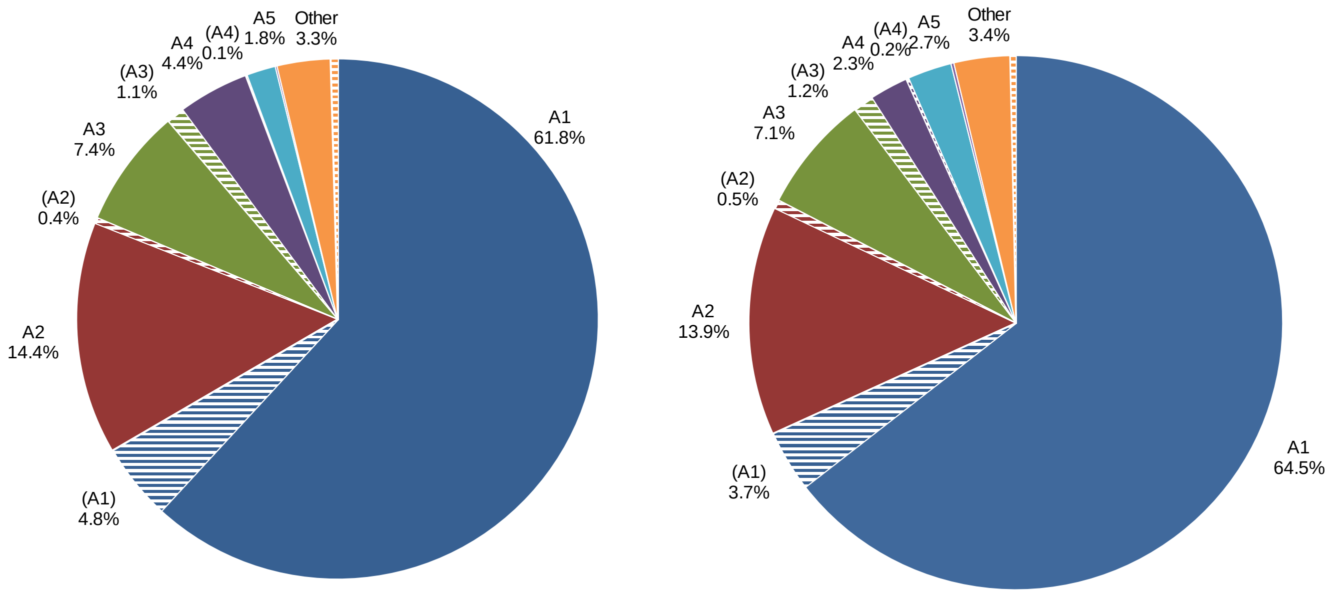
	Total	Vacant	Vacancy Rate
Units/Premises (No.)	563	35	6.2%
Frontage (Metres)	5,349	379	7.1%
Floorspace (Sqm)	88,920	4,537	5.1 %

Use Classes

Maintaining an appropriate mix of uses is essential to protecting and enhancing the vitality and viability of the borough's town centres, whilst also ensuring that they continue to meet resident and visitor demands. In particular, the promotion of A1 uses and resistance of excessive change away from core retail uses is a key objective of local policy (Sh1, Sh7 & Sh8).

Nearly all the 4 town centre's retail units (96.7%) fall within the main retail use classes (A1 to A5), with A1 use alone accounting for almost 67% of all premises.

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



There has been a slight change in the total amount of shopping frontage in A1- A5 uses across the borough's four town centres which now makes up around 97% of the total. As can be seen from figure 6 above, the majority of the centres retail frontage is in A1 use (67%), whilst A3- A5 uses combined represent around 15% of the total shopping frontage. 'Other' typically non-retail uses account for 3.3% of ground floor retail frontage in the borough's town centres.

In terms of units, a large proportion of retail units are in A1, representing more than two-thirds of all units. Followed by Service type (A2) and A3-A5 uses, both make up around 15% of retail units.

Figure 6 A1 Retail in Town Centre Units

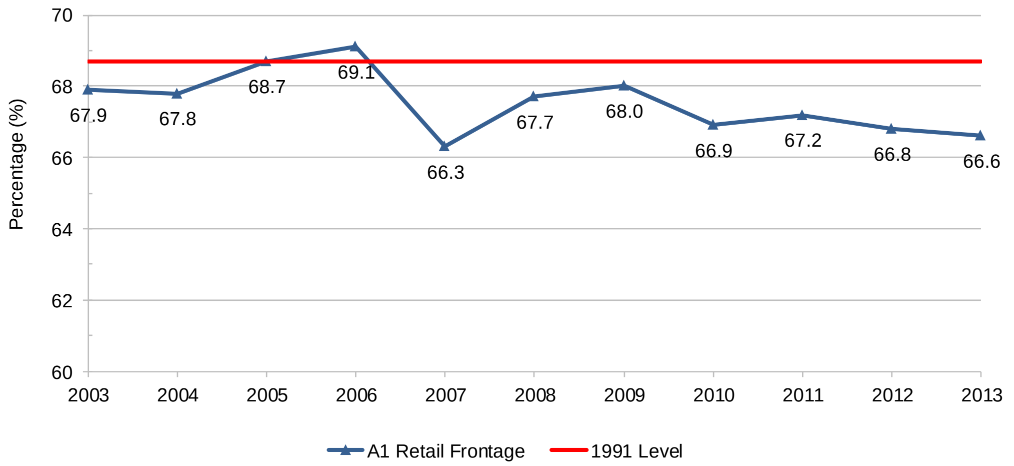


Figure 6 demonstrates that on the whole policies aimed at protecting against excessive loss of A1 premises in town centres have been successful. In 1991, A1 represented almost 69% of total frontage across the four town centres and, although there have been some slight movements over the years; this proportion has broadly been maintained and currently stands at almost 67%.

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.

There has been some change in retail offer across the borough's four town centres in the last 6 months. Comparison and service retail offer both fell, whilst food & drink leisure offer increased. Despite this change, comparison retail offer still dominates in terms of; total units (214) and subsequently net floorspace (36,209 sqm).

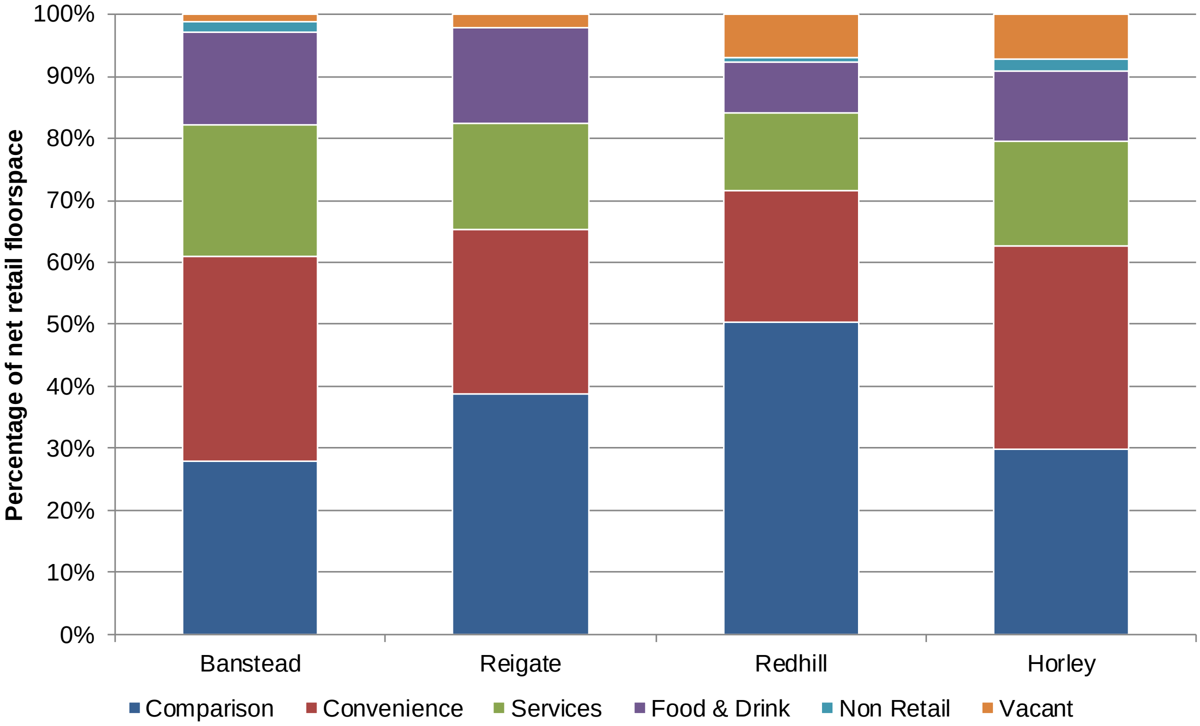
Table 2 below shows convenience retail once again accounts for the lowest percentage of units at under 9%, yet still makes up over a quarter of the total retail floorspace. This is largely due to the dominance of larger format supermarkets. Once again service retail offer makes up the second highest percentage of units across the four town centres, accounting for 30% of the total. However this only makes up around 16% of total retail floorspace, suggesting such businesses tend to occupy smaller retail units.

Table 2 Breakdown of Retail Offer

	Units	Floorspace(sqm)
Comparison	214 (38.0%)	36,209 (40.7%)
Convenience	49 (8.7%)	23,392 (26.3%)
Service	169 (30.0%)	13,879 (15.7%)
Food & Drink Leisure	80 (14.3%)	9,985 (11.2%)
Non-Retail	16 (2.8%)	918 (1.0%)
Vacant	35 (6.2%)	4,537 (5.1%)
Total	**563**	**88,920**

As shown in figure 7 below, Redhill has the highest proportion of comparison retail accounting for 55% of the centres total retail floorspace; however, given its principle role as both a primary centre and main shopping destination for the borough this is perhaps unsurprising. Banstead and Horley have the highest proportion of convenience retail floorspace accounting for almost 33%, further reflecting their roles as district centres serving the needs of the local population.

Figure 7 Retail Offer by Centre



Main Retail Categories

As can be seen in table 3 below there has been a slight change to the total retail categories on offer across the borough's four town centres since the last monitoring period. The total number of food & drink establishments increased to 80, whilst the total number of comparison, non A class and vacant units all fell in the last 6 months. Despite this change comparison retail continues to be the dominant retail offer accounting for 38% of the total. The main service retailers found in the borough's four town centres are predominately made up of; hairdressers, nail and beauty salons. A large proportion are located in Banstead and Reigate at; 10% and 8%, respectively. Redhill saw an increase in the number of hair and beauty salons taking the total number of units up to 12.

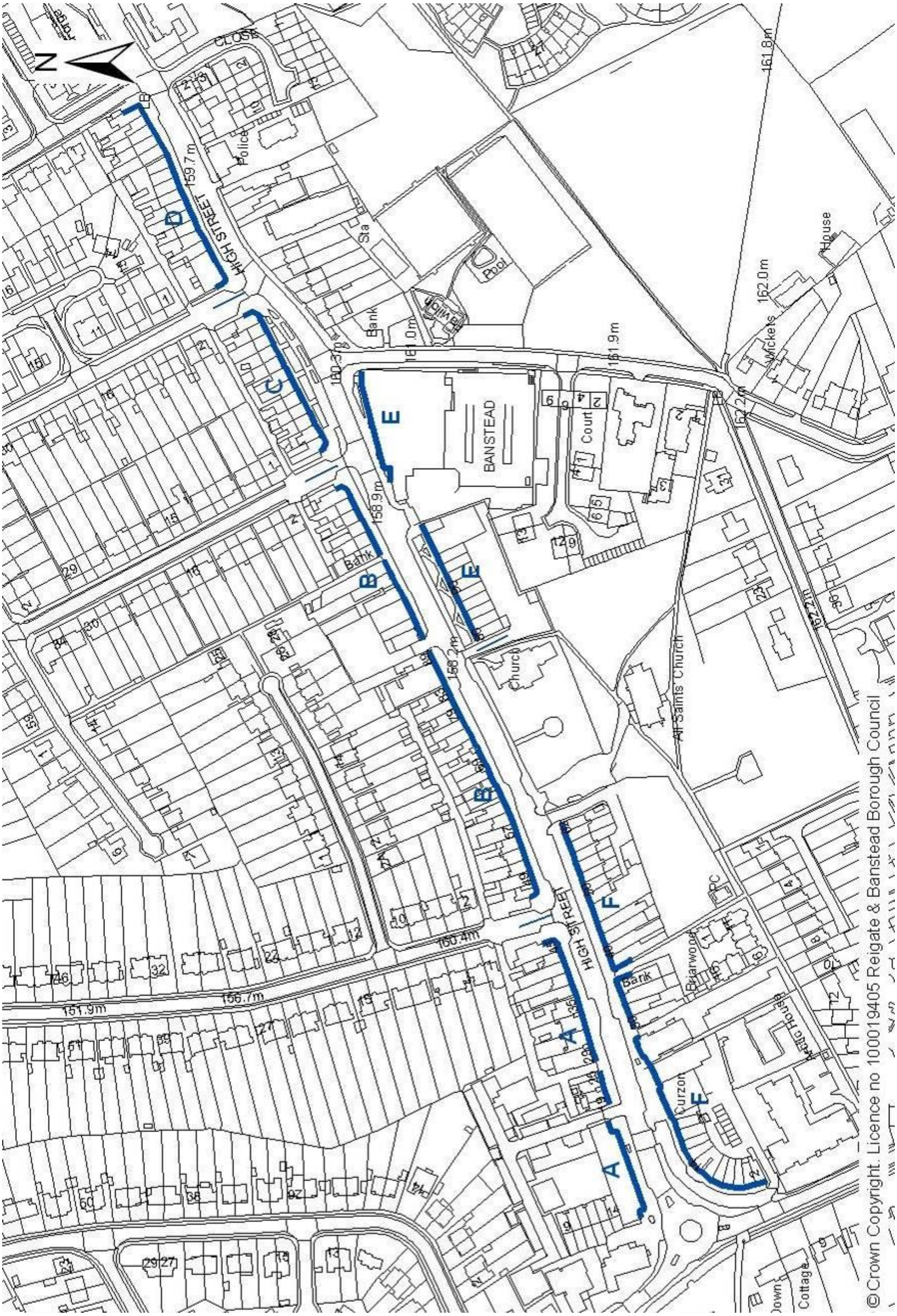
Reigate has the highest proportion of retailers selling; clothing, footwear and accessories, accounting for over 40% of the town centre's total comparison retail offer, compared to the three other town centres in the borough. Conversely, Redhill town centre continues to have the lowest proportion of clothing, footwear and accessories retailers at around 27%, despite a new clothing retailer moving into the Belfry Centre. This is a relatively small proportion given that Redhill is the primary town centre in the borough. Horley and Banstead town centre's both continue to have the highest representation of convenience premises, in particular with supermarket provision reflecting their role more as district centres serving the local catchment.

The proportion of food & drink establishments has increased to almost 15% (80 premises) in the last 6 months. Horley continues to have the most takeaways while Reigate and Banstead both have the highest number of restaurants.

Table 3 Detailed Breakdown of Retail Categories

Comparison	Banstead	Reigate	Redhill	Horley	TOTAL
Clothing, Footwear & Accessories	15	32	17	8	72
Bookshops & Stationers	2	5	7	1	15
Home & DIY	8	15	3	3	29
Electronics & Technology	2	3	8	0	13
Charity/Second-Hand	6	7	7	9	29
Toys, Games & Sports	0	3	2	0	5
Other Comparison Retail (e.g. Gifts, Florists)	11	15	19	6	51
Total Comparison	**44 (37.9%)**	**80 (46.2%)**	**63 (37.1%)**	**27 (26.0%)**	**214 (38.0%)**
Convenience					
Food/Supermarket	8	5	7	7	27
Newsagents	1	3	4	3	11
Chemist/Pharmacy	4	1	3	3	11
Total Convenience	**13 (11.2%)**	**9 (5.2%)**	**14 (8.2%)**	**13 (12.5%)**	**49 (8.7%)**
Service					
Travel Agents	2	1	2	0	5
Hair & Beauty	12	14	12	9	47
Opticians	4	5	6	1	16
Banking	6	7	8	6	27
Estate Agents	6	11	6	7	30
Bookmakers	2	1	5	2	10
Dry Cleaning	2	3	2	2	9
Other Services (e.g. Employment, Repairs)	6	6	8	5	25
Total Service	**40 (34.5%)**	**48 (27.8%)**	**49 (28.8%)**	**32 (30.8%)**	**169 (30.0%)**
Food & Drink Establishments					
Restaurant	9	13	5	5	32
Take-away	3	3	3	5	14
Café/Sandwich Bar	3	6	8	4	21
Pub/Club	0	6	3	4	13
Total Food & Drink Establishments	**15 (12.9%)**	**28 (16.2%)**	**19 (11.2%)**	**18 (17.2%)**	**80 (14.3%)**
Non A Class	1 (0.9%)	2 (1.2%)	7 (4.1%)	6 (5.8%)	16 (2.8%)
Vacant	3 (2.6%)	6 (3.4%)	18(10.6%)	8 (7.7%)	35 (6.2%)
TOTAL	**116**	**173**	**170**	**104**	**563**

Banstead Village



Commentary

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

Vitality

Figure 8 below shows primary retail uses (A1-A5) continues to make up over 98% of Banstead's total retail frontage. There has been no change to the town centres total A1 retail frontage which still makes up almost 72%, just short of the 75% threshold requirement set out in the Borough Local Plan for A1 shops. In the last 6 months there has been a small change to the composition of Banstead's retail floorspace, which has seen a slight increase in vacant retail floorspace (1.3%).

Convenience retail makes up the majority of the town centre's retail floorspace accounting for almost one third. Banstead continues to have the highest proportion of service floorspace at 21% compared to the other three town centres in the borough. 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 second highest proportion of food & drink leisure retail floorspace at 15%, this is predominately made up of Waitrose.

Figure 8 Breakdown of Use Classes (Frontage)

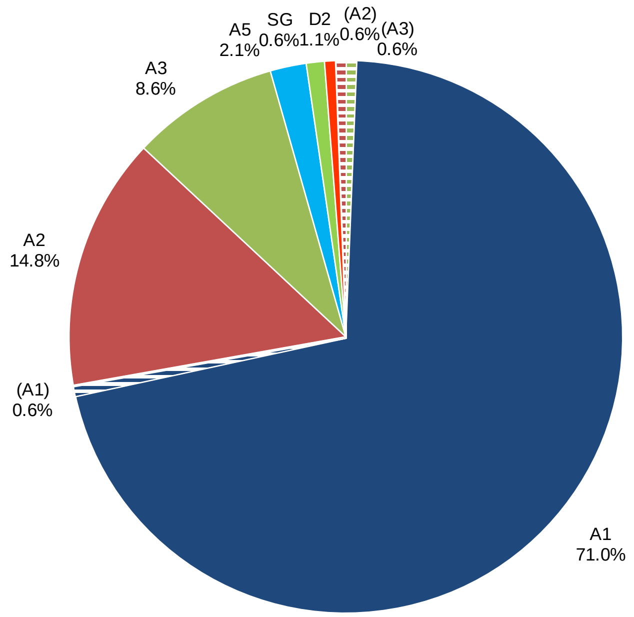


Table 4 Retail Offer

	Units	Net Floorspace (sqm)
Comparison	44 (37.9%)	3,445 (28.0%)
Convenience	13 (11.2%)	4,038 (32.8%)
Service	40 (34.5%)	2,631 (21.4%)
Food & Drink Leisure	15 (12.9%)	1,819 (14.8%)
Non-Retail	1 (0.9%)	210 (1.7%)
Vacant	3 (2.6%)	155 (1.3%)
Total	**116**	**12,298**

Vacancies & New Occupiers

The total number of vacant units currently stands at three, an increase from two units recorded in the previous monitoring period (March 2013).

	Vacancy Rate
% of units	2.6%
% of frontage	1.8%
% of net retail floorspace	1.3%

The increase in Banstead's vacancy rate has increased the town's total vacant frontage (1.8%) and net retail floorspace (1.3%). Despite this increase the figures are still below the borough's 5% threshold requirement.

In total, two new occupiers moved into the town centre in the last six months, one into a previously vacant unit. The other new occupier took over a double retail unit previously occupied by (One One Seven - ladies fashion), which closed down in the last six months. The retail unit at 167 High Street has been vacant for more than six months since the previous occupier downsized and currently occupiers a single retail unit at 169 High Street.

Development & Use Class Changes

There has been some change of use and refurbishment within Banstead town centre in the last six months. This includes; a change of use to the first and second floors on 141a High Street (11/02105/F) from A2 offices to a residential unit resulting in a net loss of 80sq/ft of retail floorspace. Refurbishment work has also been completed at 16 High Street (12/01662/F) and includes; a new shop front and advertisement for Robert Fuller (clothing) which now occupies three retail units.

The following planning permissions remain extant:

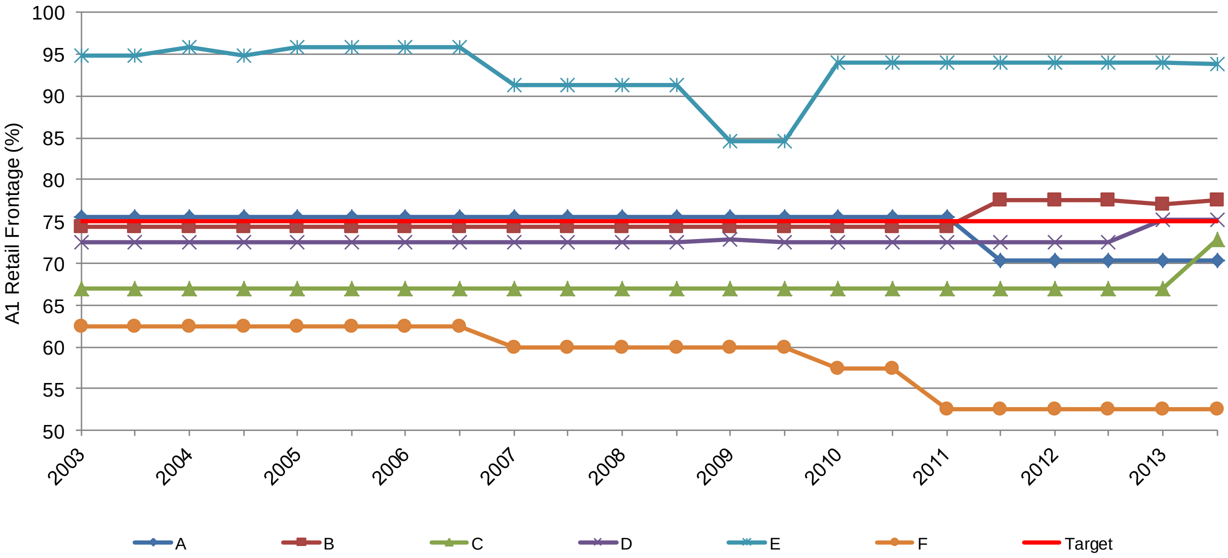
- 12/02085/F - Extension to Banstead Methodist Church providing an additional 1,311sqm B1(a)/ D1 floorspace.
- 12/02101/F- new development at 89 High Street providing a net gain of 92sqm of A1 retail floorspace.

Frontages

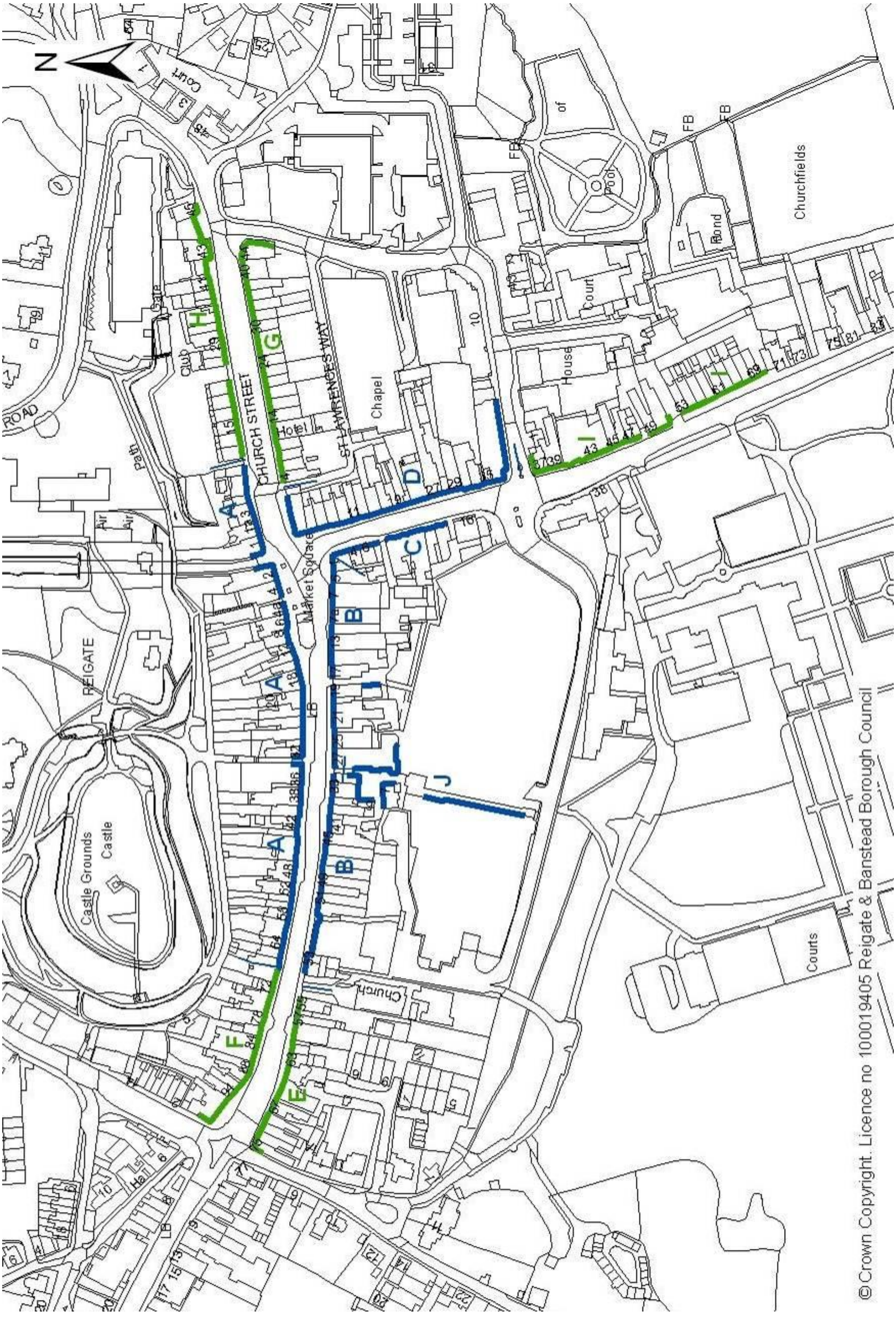
Banstead town centre continues to have a strong A1 retail frontage and has done so for a number of years (see figure 9 below). There has been no change to the A1 retail threshold at Frontages; A, D & F since the last monitoring period, with Frontage A and D both continuing to exceed the 75% threshold and 77%. Once again Frontage F falls considerably below the A1 requirement; this is due to a number of A2 and A3 units with particularly long frontages falling within this frontage.

Frontage C saw the biggest increase in the proportion of A1 retail accounting for almost 73%, which just falls below the A1 threshold requirement. Once again Frontage E continues to exceed the 75% A1 retail target by a significant margin and has done so for a number of years. The location of Waitrose has helped to maintain a strong frontage.

Figure 9 Banstead Frontage A1 Retail Trend



Reigate Town Centre



Commentary

Reigate Town Centre is an historic market town, most of which falls within a conservation area. The centre has a high proportion of smaller retail units, many of which contribute to the character and highly valued townscape of the centre. Reigate in particular has a significant 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 foodstores, the smaller Marks & Spencer store along the High Street and the large Morrisons supermarket which lies behind the main street in Cage Yard.

Vitality

As can be seen from Figure 10, Reigate has the highest proportion of frontage falling within A1 to A5 use classes, accounting for over 99% of the total. Significantly, the proportion is consistent across both the primary and secondary frontages. However, both the primary and secondary frontages fall slightly below the A1 threshold set out in the local plan, with primary frontage having around 74% (against 80% target) and the secondary frontage making up 58% (against 66% target).

Reigate has the highest proportion of food & drink leisure floorspace and units, accounting for 16% and 15% respectively, the highest percentage out of all the four town centres. The majority fall within the town's secondary retail frontage. Many of these cafes, restaurants and pubs are of high quality and contribute to the vitality and active evening environment within the town centre.

The centre continues to have the highest percentage of comparison units (46%) and the second highest proportion of comparison retail floorspace (39%), after Redhill. This is largely due to the high volume of boutique shops selling specifically Home & DIY, gifts, clothing, footwear and accessories, which when combined together account for almost 36% of the total retail premises.

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

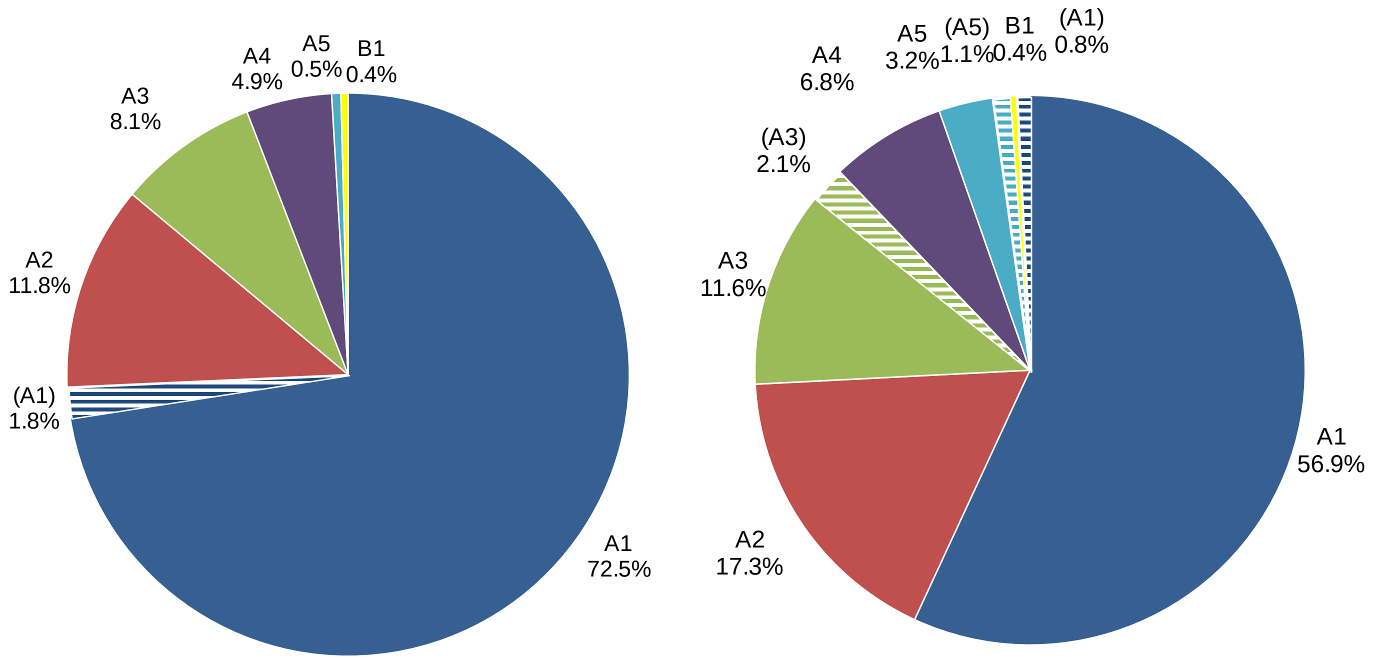


Table 5 Retail Offer

	Units	Net Floorspace (sqm)
Comparison	80 (46.2%)	7,712 (38.8%)
Convenience	9 (5.2%)	5,276 (26.6%)
Service	48 (27.8%)	3,398 (17.1%)
Food & Drink Leisure	28 (16.2%)	3,055 (15.4%)
Non-Retail	2 (1.2%)	0 (0.0%)
Vacant	6 (3.4%)	418 (2.1%)
Total	**173**	**19,859**

Vacancies & New Occupiers

In the past six months the total number of vacant units in Reigate has increase by one and currently stands at six units, which represents 2.1% of the town centres units. This has led to an increase in the town centre's vacant retail floospace (418sqm). Subsequently, Reigate's vacant frontage has also increased slightly in the last six months to 2.6%. This is largely due to a number of small retail units becoming vacant. In addition, Giggling Squid Thai restaurant has recently opened in the former Pucinno's café which had been vacant for some time, whilst a new occupier is currently fitting out in the former Bell Street Bistro.

	Vacancy Rate
% of units	3.4%
% of frontage	2.6%
% of net retail floorspace	2.1%

A total of 5 new occupiers moved into Reigate town centre since the last monitor was produced, three of which moved into previously vacant units, whilst a further two new occupiers have taken over previously occupied retail units. Over the same period three units became vacant, two of which were due to businesses relocating. This includes Attic which has a new occupier (All About Eve @ home) expected to open in the next six weeks. A further retailer on the High Street (CC clothing) is closing down, whilst the former Bell Street Bistro has recently closed. The later has recently been granted permission for refurbishment suggesting a new occupier will be moving in. A further two units have been vacant for more than six months, however the long term vacant unit previously occupied by Wok Inn now has a let agreed, which will further lower the centre's vacancy rate.

Development & Use Class Changes

In the last six months there have been no changes of use or new developments within the town centre.

There are however a number of extant planning permissions, as follows:

- 11/02227/CU – Conversion of 25-29 Church Street from D2 into a restaurant (A3).
- 11/01488/F – Demolition of the existing building to the rear of the site to be replaced with a 2 storey office building, providing an additional 106 sqm of B1(A) use.
- 13/00281/CU – Conversion of Emmerton House, 16 Bell Street from B1(a) to either A2 or D1

Three new planning permissions have been granted in this monitoring period, including;

- (13/01085/F) - refurbish the existing Bell Street Bistro on 41 Bell Street to include a; new shop front and signage. Refurbishment work has already started
- 13/01007/CU – 1st floor conversion from C3 to A1 (homeware retail unit) above the existing 'House of Building' retail unit
- 13/01003/CU – Conversion of 1st floor apartment (C3) into A3 use to provide additional 42.6

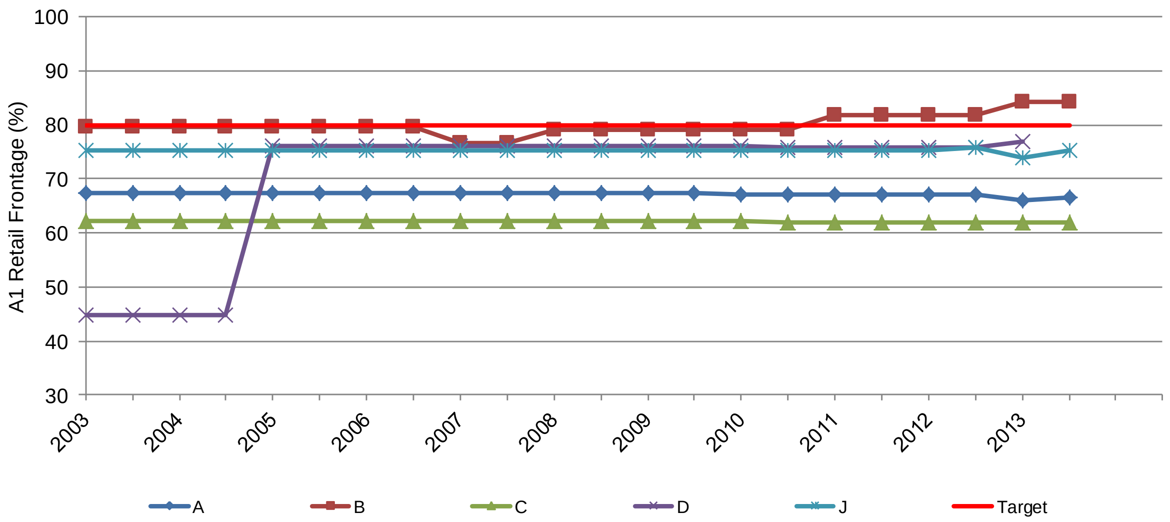
sqm (net) floorspace to the existing Urban 9 restaurant above Urban Kitchens.

Frontages

Primary

Frontage B (84%) continues to be the only primary frontage to exceed the 80% threshold for A1 retail. There has however been a slight increase in the percentage of A1 retail for frontages A, D & J, with the later two frontages only just falling below the primary A1 threshold (80%). Once again Frontage C has the lowest percentage of A1 primary frontage at 62% and has been the case for a number of years. This is largely due to the number of estate agents found within this frontage.

Figure 11 Reigate Primary Frontage A1 Retail Trend

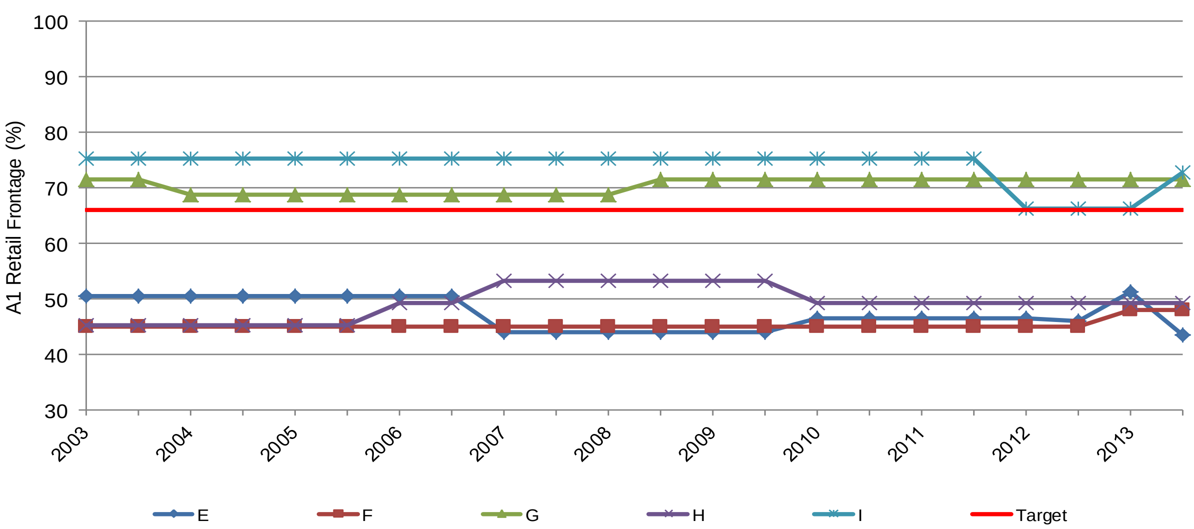


Secondary

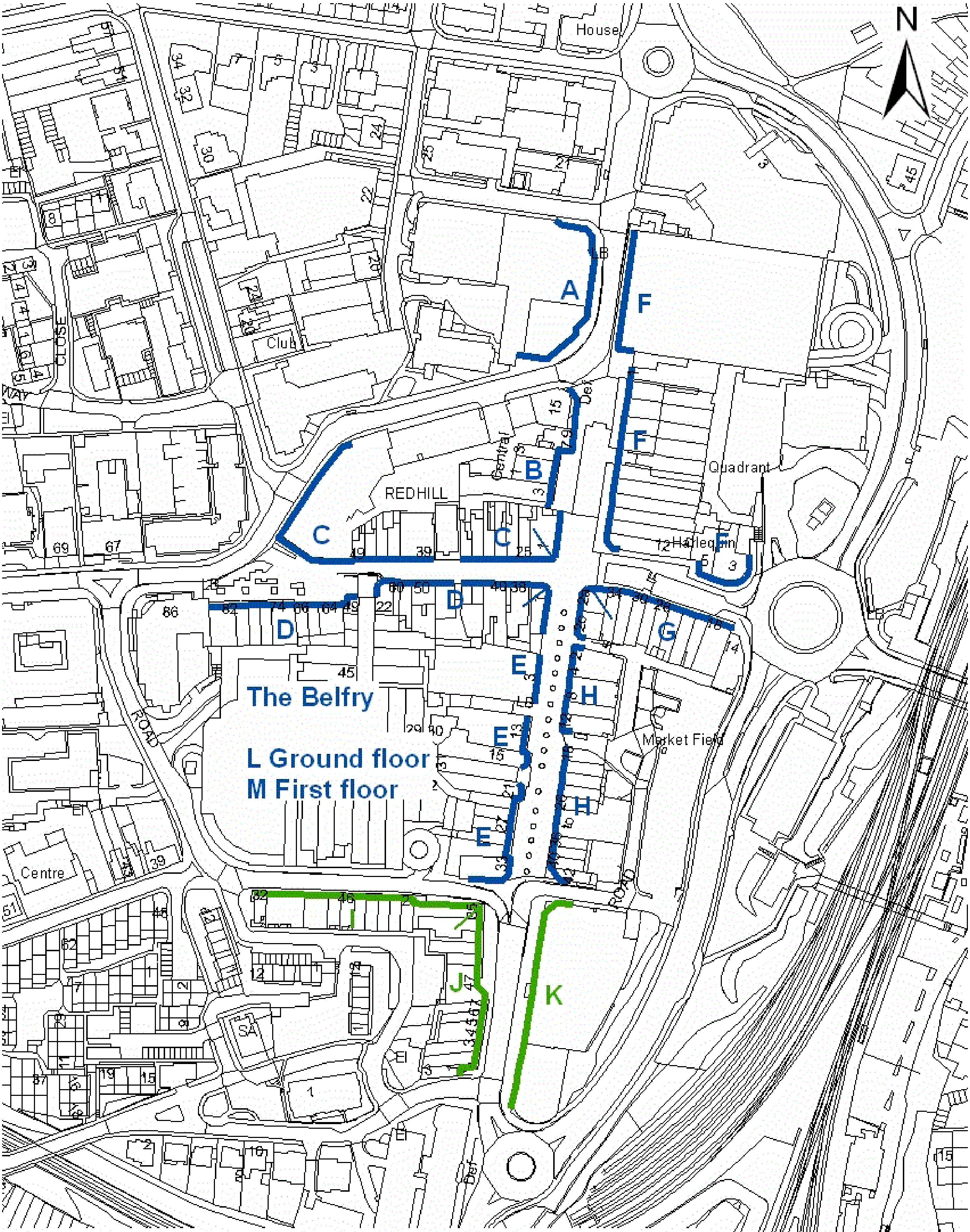
On the whole the composition of secondary frontages in A1 has stayed the same, with the exception of Frontage E which has dropped to 43% and is partly down to the recent loss of Loti and Ted retailer.

There has been little change to the composition of secondary frontages in the last year, with all five secondary frontages in A1 broadly staying the same. Once again frontages G & I exceed the 66% A1threshold requirement and have done so for the past decade. Conversely, frontages E, F & H still fall below the target and have done so for the last few years.

Figure 12 Reigate Secondary Frontage A1 Retail Trend



Redhill Town Centre



Commentary

Redhill Town Centre is the largest of the borough's town centres in terms of retail frontage and is recognised as a major town centre by the Surrey retail hierarchy. Retail activity is focussed around the main pedestrianised High Street which runs from north to south, with a series of smaller shopping streets running off of this. However, it is recognised that the public realm and townscape within the centre is in need of attention. Redhill Town Centre is also home to the Belfry Shopping Centre and the Harlequin Theatre.

The regeneration of Redhill continues to gather pace following on from the redevelopment of Nobel House. Planning permission has been granted for a multi-million pound redevelopment of Warwick Quadrant, which will include a larger Sainsbury's supermarket, a new gym and town centre car park. Additional work will also be carried out to improve the public open spaces and realm within Redhill Town Centre. There are further plans proposed for the redevelopment of Redhill train station and a new traffic management system (Balanced Transport Network). Work has recently started on altering the town centre's road network.

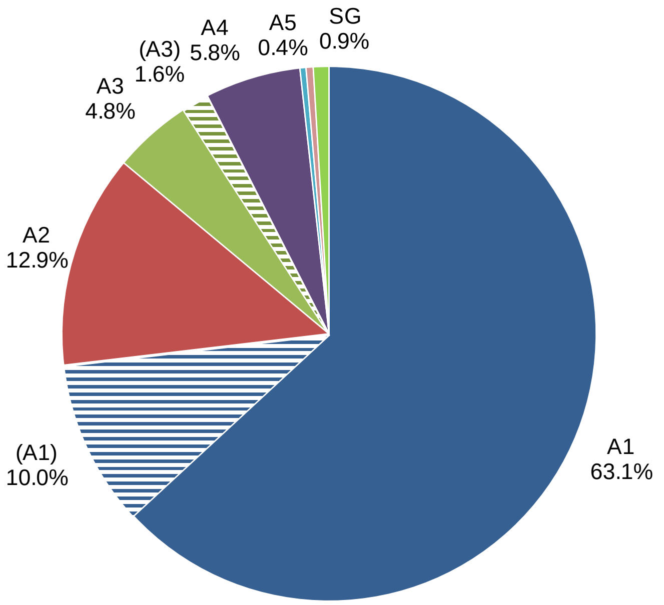
Vitality

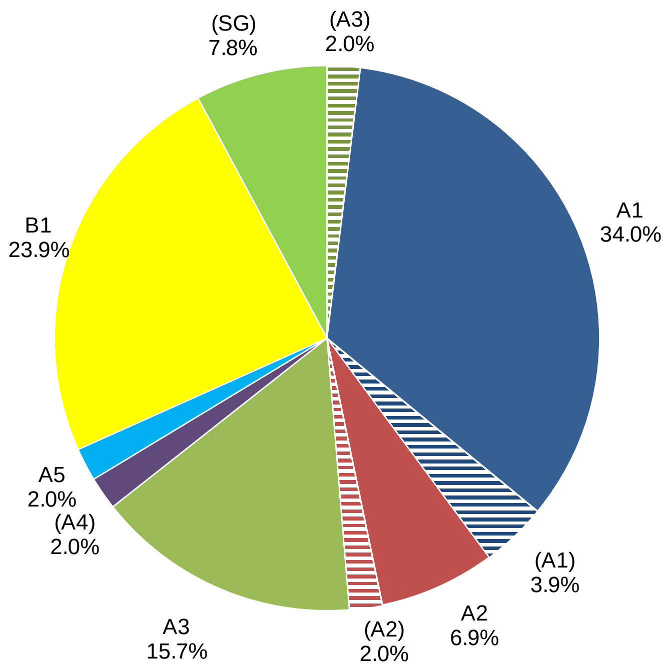
Retail (A1 to A5) uses constitute around 94% of the total frontage in Redhill Town Centre, the lowest of the four town centres. However, this varies significantly across the primary and secondary frontages with the former having more than 99% of its frontage in retail use, whilst the latter only has 68%.

Redhill's primary and secondary frontages both miss the A1 requirement, with primary frontage having 73% (against 80% target) and the secondary only 38% (against 66% target). The town's secondary frontage is predominately made up of office frontage and includes; Kingsgate, which was previously retail frontage.

Of all of the town centres, Redhill has the largest representation of multiple retailers, particularly within the Belfry Shopping Centre which is home to stores such as M & S, Waterstones and Clarks Shoes. In the last six months total vacant primary retail frontage has fallen to under 12%, largely due to an increased take up of previously vacant units, two of which are in the Belfry Shopping Centre.

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





Comparison retail remains the dominant retail offer in Redhill, as would be expected for a primary centre and sub-regional destination. At 50%, Redhill has a considerably higher proportion of floorspace offering comparison goods than any of the other centres. On the other hand the proportion of food & drink leisure floorspace is considerably lower than the borough's other three centres. This makes up around 8% of the total; compared to Reigate which has double the amount of food & drink leisure floorspace.

It is also recognised that the quality of offer in the town centre could be improved. This is an area which will need to be addressed if Redhill is to become a competitive and successful shopping and leisure destination. A high degree of diversity exists within Redhill's secondary frontages that could be a positive asset to the town centre.

Table 6 Retail Offer

	Units	Net Floorspace (sqm)
Comparison	63 (37.1%)	19,965 (50.2%)
Convenience	14 (8.2%)	8,486 (21.4%)
Service	49 (28.8%)	4,983 (12.5%)
Food & Drink Leisure	19 (11.2%)	3,206 (8.1%)
Non-Retail	7 (4.1%)	343 (0.9%)
Vacant	18 (10.6%)	2,757 (6.9%)
Total	**170**	**39,740**

Vacancies & New Occupiers

In the last six months the number of vacant retail units fell from 19 to 18 units. This has led to a drop in Redhill's total vacant frontage (12.6%) and net retail floorspace (6.9%) due to new occupiers moving into vacant premises. Despite this; Redhill continues to have the highest vacancy rate out of all the town centres in the borough.

	Vacancy Rate
% of units	10.6%
% of frontage	12.6%
% of net retail floorspace	6.9%

A total of 4 new occupiers moved into the town centre, 3 of which moved into retail units that have been vacant for over a year. A temporary occupier (Reigate & Redhill 150th Anniversary Centre) has moved into the former Early Learning Centre unit in the Belfry, until the end of September 2013. Another vacant retail unit in the Belfry Centre will soon be occupied by 'Live Smart;' a multi partnership project led by YMCA to improve people's health and well being. This is planned to open in late autumn 2013. Against this, 16 units have been vacant for more than 6 months several of which are located along Cromwell Road. This further emphasises the need to monitor retail performance in the town centre to ensure that the number of vacant units does not continue to rise and potentially threaten Redhill's main function, as a primary town centre. A further 2 retail units have become vacant in the last 6 months one of which includes the Redhill Help Shop which has recently relocated to the Harlequin Centre.

Developments & Use Class Changes

Since the last monitoring period there has been some changes in Redhill Town Centre including; a change of use from A1 to A3 which is now occupied by West Central Café.

There are a number of planning permissions proposing extensions and a change of use in Redhill town centre as follows: development has not yet started on any of the sites.

- 12/01851/F- Single storey office extension at 42 Station Road providing additional A2/SG floorspace

- 11/02132/F -Extension at 7-9 London Road providing 3,059 sqm of additional A1 floorspace
- 11/01586/F- Proposing a change of use from A2 (bank) to A3 (restaurant) at 1 London Road

The council has approved two revised planning applications proposing large scale mixed development within Redhill Town Centre.

The first is for the redevelopment of the existing Sainsbury's store (12/01852/F) on London Road providing an additional 13,968sqm of A1 retail space to the existing foodstore, and a new gym, along with improvements to the public realm and townscape in the town centre. This development will contribute to the overall regeneration of Redhill.

The second revised application (13/00420/F) is to redevelop the former Liquid & Envy Nightclub for mixed use. The proposal will provide 355 sqm of A1 ground floor retail space, 61 residential dwellings and associated parking, landscaping, etc.

An application by ASDA (ref: 11/01860/F) to redevelop the Cromwell Road site to provide a large foodstore (net 2,600sqm) and a number of smaller retail units is still being considered by the council.

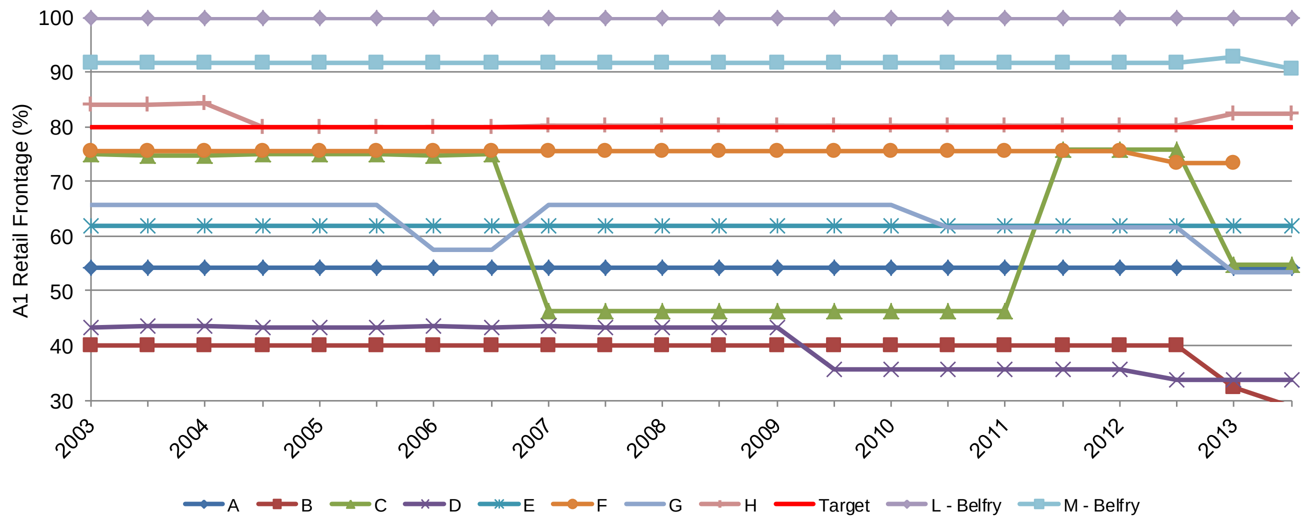
Frontages

Primary

There is considerable variation in the proportion of A1 retail falling within Redhill's primary retail frontages. The highest being 100% in Frontage L which is located in the Belfry Shopping Centre whilst fontage B has the lowest representation of retail frontage at 29%. The percentage of A1 retail frontage has changed very little in the last six months; the only exceptions were in frontages B & M where A1 retail fell to 29% and 91% respectively. Frontages H, L & M all continue to exceed the 80% primary A1 retail threshold which has been the case for the last six years. While frontage F continues to fall just below the A1 retail requirement, accounting for 73% of the total.

The remaining primary frontages all still continue to fall considerably below the target. Yet again frontages B & D are of particular cause for concern, these 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.

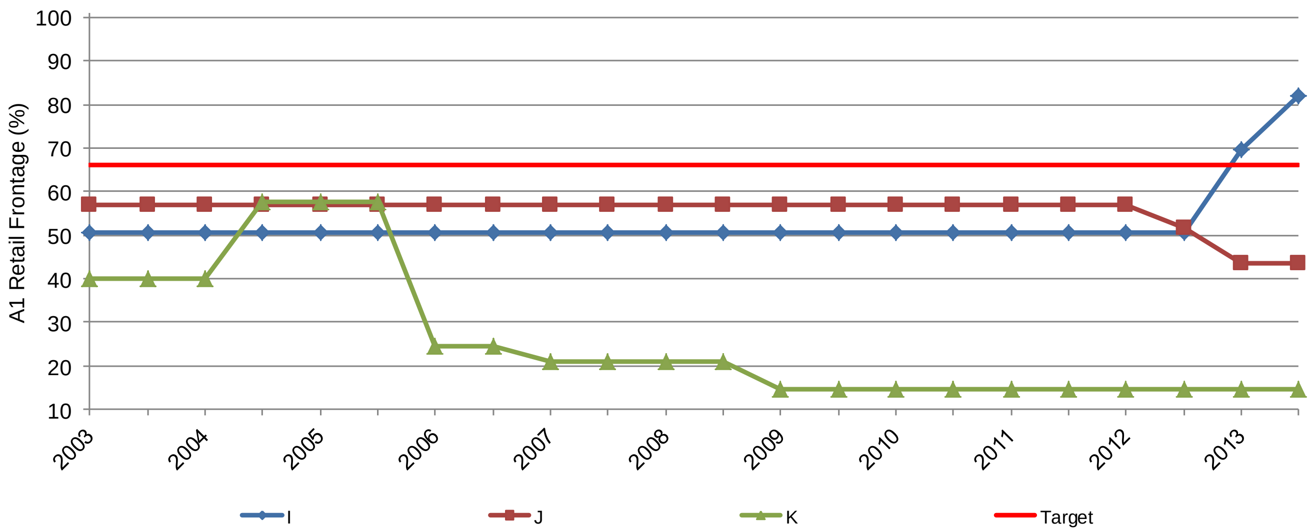
Figure 14 Redhill Primary Frontage A1 Retail Trend



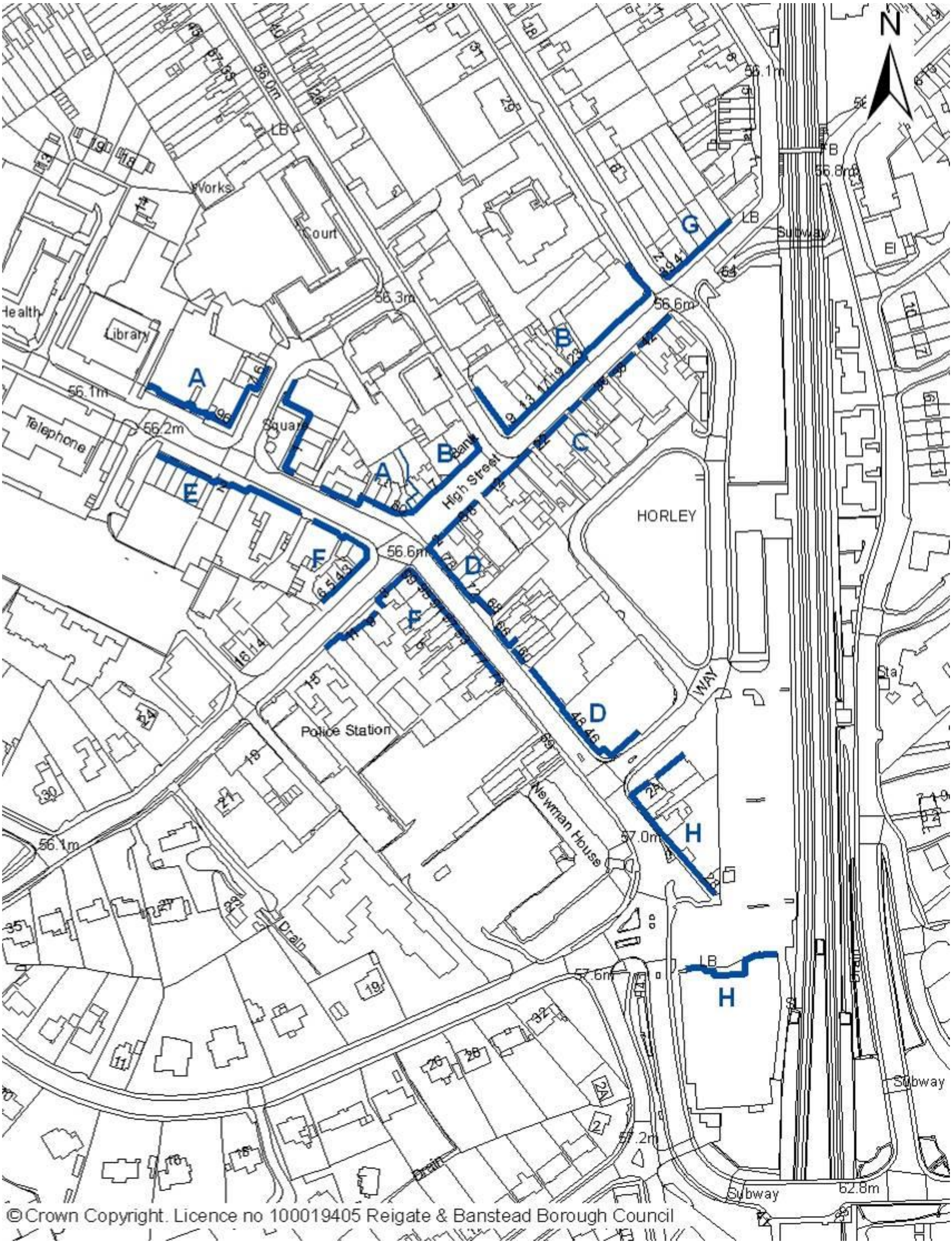
Secondary

Frontages J & K both continue to fall below the borough's 66% A1 retail requirement and have done so for the past 10 years, accounting for 43% and 15% respectively. The low proportion of A1 retail in frontage K is largely as a result of the Kingsgate and Red Central office developments, replacing previous retail frontages with offices. As part of the Development Management Policies (DMP), retail frontages will be reviewed including whether it remains appropriate to consider area K as part of the retail frontage. Conversely, Frontage I continues to exceed the 66% A1 retail requirement at almost 83%. This is largely due to a number of A1 retail units with long A1 frontages located in this area.

Figure 15 Redhill Secondary Frontage A1 Retail Trend



Horley Town Centre



Commentary

Horley Town Centre is a compact district centre at the southern end of the Borough. The centre benefits from Horley railway station which lies just beyond the shopping area to the south. The centre consists of several shopping areas orientated around the junction of Victoria Road and High Street. The main parade on High Street is pedestrianised with other areas of the town centre undergoing significant public realm improvements as part of the Horley Town Centre regeneration. The town centre is also home to a large Waitrose store to the south and a large independent department store (Batchelors).

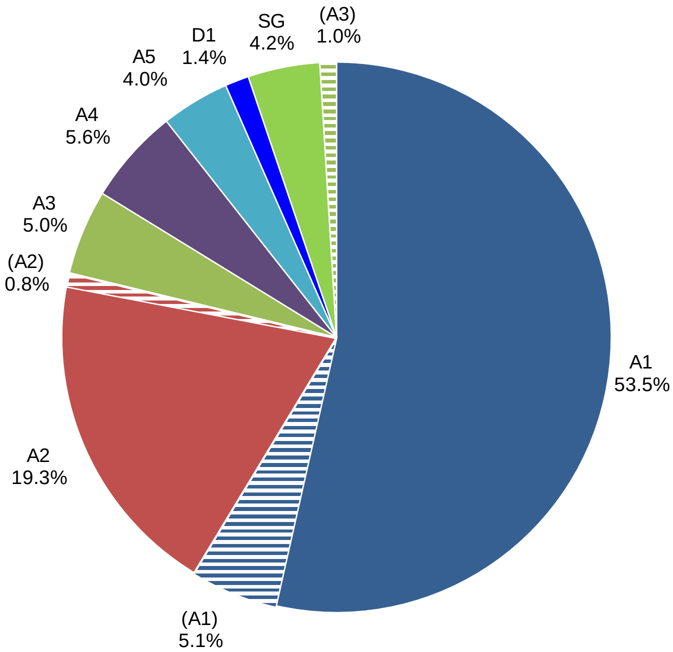
The town centre has recently been awarded government funding from the 'High Street Innovation Fund' to help boost and improve the vitality of Horley Town Centre which has been hit by the recent economic downturn. This has seen a number of local businesses disappearing from the town and increased vacancies.

Vitality

The majority of Horley's retail frontage is in A1- A5 use accounting for almost 96% of the total, with over half being in A1 use (59%). This is still considerably lower when compared with the boroughs other three centres. There has been an increase in frontages in A2 and A3 uses, combined these account for 26% of the total and is largely due to a proposed change of use.

Horley Town Centre has the highest percentage of retail frontage made up of food & drink retail uses (A3-A5), at almost 15% of the total; compared with the borough's other three town centres.

Figure 16 Breakdown of Frontage by Use Class



Horley town centre has the highest proportion of convenience floorspace at 33% compared to the other three town centres in the borough. This is not surprising given Horley's primary role as a district centre serving the needs of the local population. Despite a drop in comparison retail floorspace in the last six months; comparison still makes up a significant proportion of Horley's retail floorspace at almost 30%.

Horley continues to have the highest proportion of takeaways and charity shops compared with the other three town centres, which could affect the long term viability of Horley town centre in terms of an appropriate mix. There is currently an extant permission for a new convenience store (small supermarket) in the centre of Horley in one of the larger vacant retail units, previously occupied by

YMCA charity shop. It is therefore essential that key retail services in the town centre are protected to ensure that there is sufficient provision to accommodate the increasing demand from on going residential developments in the north of the town.

Table 7 Retail Offer

	Units	Net Floorspace (sqm)
Comparison	27 (26.0%)	5,087 (29.9%)
Convenience	13 (12.5%)	5,592 (32.8%)
Service	32 (30.8%)	2,867 (16.8%)
Food & Drink Leisure	18 (17.2%)	1,905 (11.2%)
Non-Retail	6 (5.8%)	365 (2.2%)
Vacant	8 (7.7%)	1,207 (7.1%)
Total	**104**	**17,023**

Vacancies & New Occupiers

In the last six months there has been a decrease in the total number of vacant retail units in Horley Town Centre. There are currently eight vacant units down from nine units recorded in the previous monitor. Despite a fall in vacancy rates, Horley continues to have the second highest vacancy rate behind Redhill.

There has however been a significant increase in vacant floorspace (7.1%) and retail frontage 6.9%) since March 2013. This is due to a retail unit with large frontage and floorspace becoming vacant in the last 6 months. Refurbishment work has already started on the vacant premises which will be occupied by a Morrison's Local Supermarket.

	Vacancy Rate
% of units	7.7%
% of frontage	6.9%
% of net retail floorspace	7.1%

In this monitoring period two new occupiers moved into previously vacant retail units and a further two new occupiers are currently fitting out in vacant units. This includes; De Pippino (Italian restaurant) in the former New China restaurant and also Morrisons Local (supermarket) fitting out in the former YMCA charity shop unit, showing some encouraging signs of recovery in Horley town centre.

Developments & Use Class Changes

There has been some change to Horley Town Centre in the last six months including proposed developments and changes of use. There are two changes of use proposed within the town centre; one to a large vacant retail unit previously occupied by YMCA (12/01652/CU) from A1- A3 use. Refurbishment work has already begun on site and will be occupied by a Morrison's Local supermarket. Another change of use is for two vacant retail units at 6/7 Consort Way (13/00175/CU) from A1/A2 uses to A3/A4 use as a restaurant/ café. Work has started on the cleared Newman House Site (12/01881/F), proposing a net gain of 3,330 sq/ft of A1, A2 & A3 mixed use.

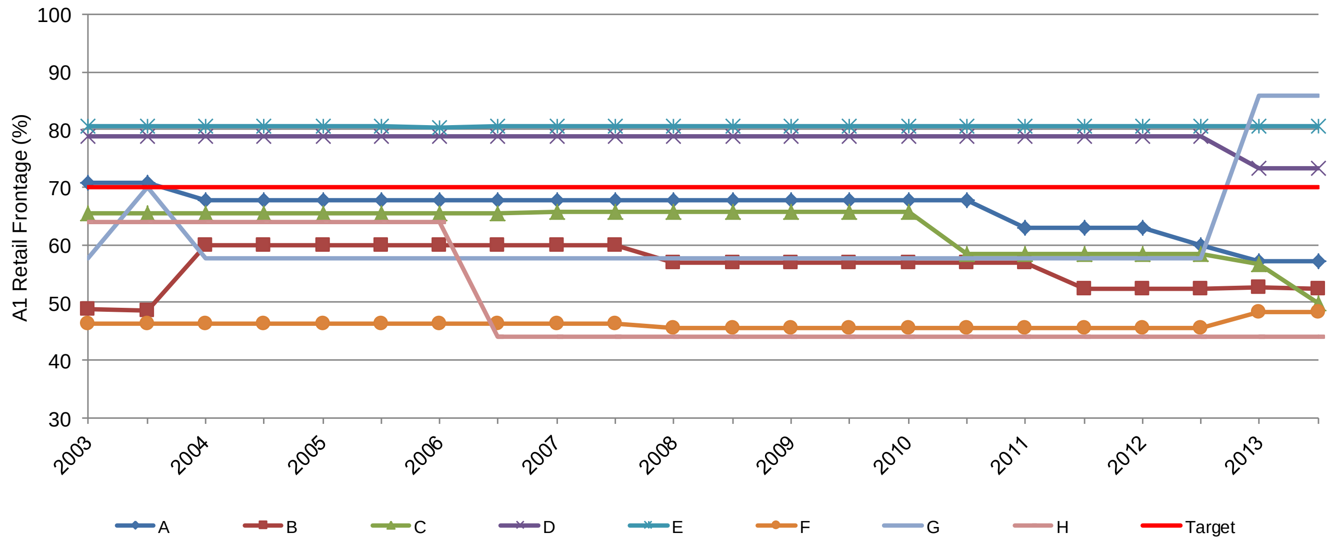
Development has not yet started at 43-49 High Street (11/00423/F) to demolish and redevelop the site comprising retail, residential and office space.

Frontages

In the last six months the biggest change in A1 retail was in Frontage C, which currently makes up just under half of the A1 retail falling within this frontage. This is due to a large retail unit with substantial frontage recently becoming vacant; previously occupied by YMCA charity shop. A further two units within this frontage are still vacant. The percentage of A1 retail within Frontages A, D,E,F,G and H has not changed in the past 6 months. Once again Frontages D, E & G all continue to exceed the 70% A1 retail requirements and have done for a number of years.

Frontages C, F & H all fall significantly below the required retail target (70%), the lowest being 44% found at frontage H. This is due to the large number of A5 (take-away) premises located within 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 sq.m.)
B1(B)	Use for research and development, studios, laboratories, high technology.	
B1(C)	Use for any industrial process that can be carried out in a residential area without detriment to amenity.	
B2	Use for the carrying on of an industrial process other than one falling in B1(C) above.	B1 or B8 (B8 limited to 235 sq.m.)
B8	Use for Storage or Distribution.	B1 (where no more than 235 sq.m.)
C1	Use as a hotel, boarding house or guesthouse where no significant element of care is provided	No permitted change
C2	Residential institution such as a nursing home or residential school.	No permitted change
C3	Use as a dwelling house, whether or not as a sole or main residence.	No permitted change
D1	Non-Residential Institutions.	No permitted change
D2	Use for Assembly and Leisure.	No permitted change
SG	Sui Generis - falls outside all other categories. Permission is required to change to or from such a use.	No permitted change

Monitoring Publications

Regular Monitors:

Areas for Small Businesses

Provides a list of all uses in the Borough's seven Areas for Small Businesses (Annual)

Commercial Commitments

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

Housing Delivery

Provides information on general housing market trends and the delivery of the amount, type and location of housing commitments in the Borough (Annual)

Industrial Estates

Contains an analysis of occupational trends in the Borough's nine main Industrial Estates including a schedule of occupiers (Annual)

Local Centres

Provides information on retail provision in the Borough's eighteen local shopping centres (Annual)

Town Centres

Provides information on the occupiers, together with vacancies and shop type of all premises within the Borough's four Town and Village Centres (Bi-annual)

Population and Demographic Information

These publications are available on the Council website:

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

Search for: *"monitors":*

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

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