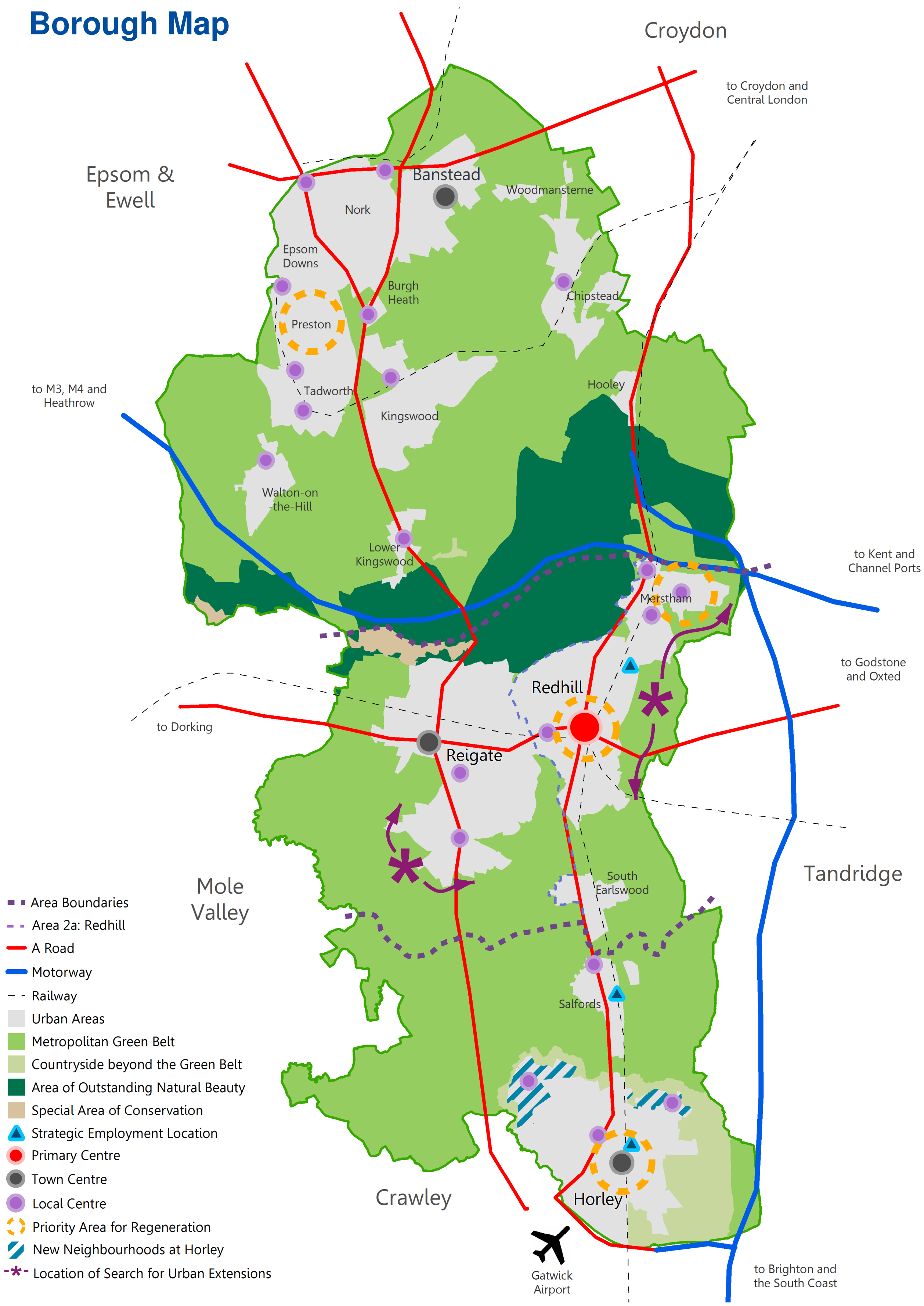
Town Centre Monitor

2018

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

Reigate & Banstead
Borough Map



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2018

Contents

Please Note:
The information contained within this monitor provides a record of the observed current uses and occupiers present within the four main Town centres in Reigate & Banstead. It does not constitute a record of the Lawful Uses of each property under Sections 191 and 192 of the Town and Country Planning Act 1990 (as amended). For further information on lawful uses, please contact Building & Development Services.

While every care has been taken to ensure that the information in this monitor is accurate, the Borough Council accepts no responsibility for any errors or omissions. We would be grateful if our attention was drawn to any inaccuracies so that they might be corrected. Similarly, any suggestions that would make the information more useful would be welcomed.

Introduction

The borough's town and district centres provide the focus for retail, service and leisure provision to serve the needs of visitors from within the borough and beyond. The purpose of monitoring town and district centres is to:

- Analyse use class and vacancy trends to assess the diversity, vitality and viability of provision
- Monitor relevant local policies contained within the Borough Local Plan, namely policies Sh1, Sh7 & Sh8
- Monitor the progress of new developments and regeneration schemes
- Provide a robust and up-to-date evidence base to assist in plan-making and decision-taking on planning applications within town centres.

The analysis focusses on the retail frontage within each of the centres; however, the use of 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 centres is available by contacting the Planning Policy Team on 01737 276000 or by emailing LDF@reigate-banstead.gov.uk.

Future Policy Developments

The Borough Local Plan 2005, including its saved policies, is in the process of being replaced by new local planning documents. The Core Strategy was formally adopted in July 2014; it details how much growth will take place until 2027 and sets out the overarching strategic approach for delivering new homes and development in the Borough. The emerging Development Management Plan will contain detailed policies relating to the management of development within the town centres and allocate sites for development across the Borough. In the interim, this monitor will continue to assess performance against saved policies Sh1, Sh7 & Sh8 in the Local Plan 2005.

Relevant Local Policies and Indicators

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

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

Retail Hierarchy

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

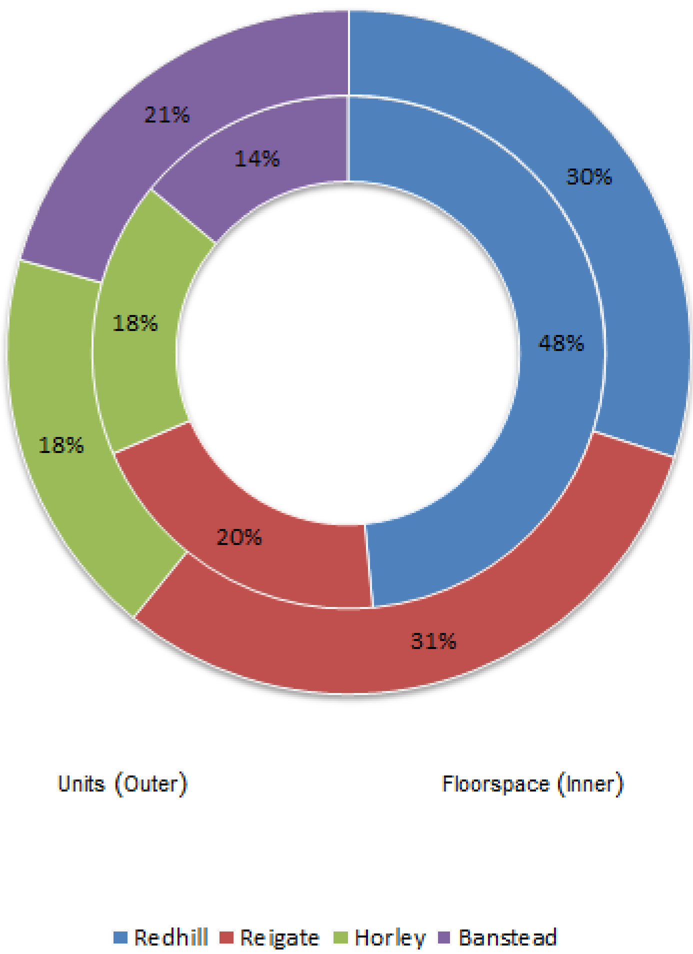
- **Redhill -** is the primary town centre and the focus of future leisure, office and comparison retail growth due to its strong transport links and role as a Regional Hub
- **Reigate -** is the secondary town centre, serving as a convenience destination with a strong range of independent and specialist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

Town Centre Retail Composition

When combined the borough's town centres provide 567 units, 97,916sqm of retail floorspace and 5,337m of retail frontage.

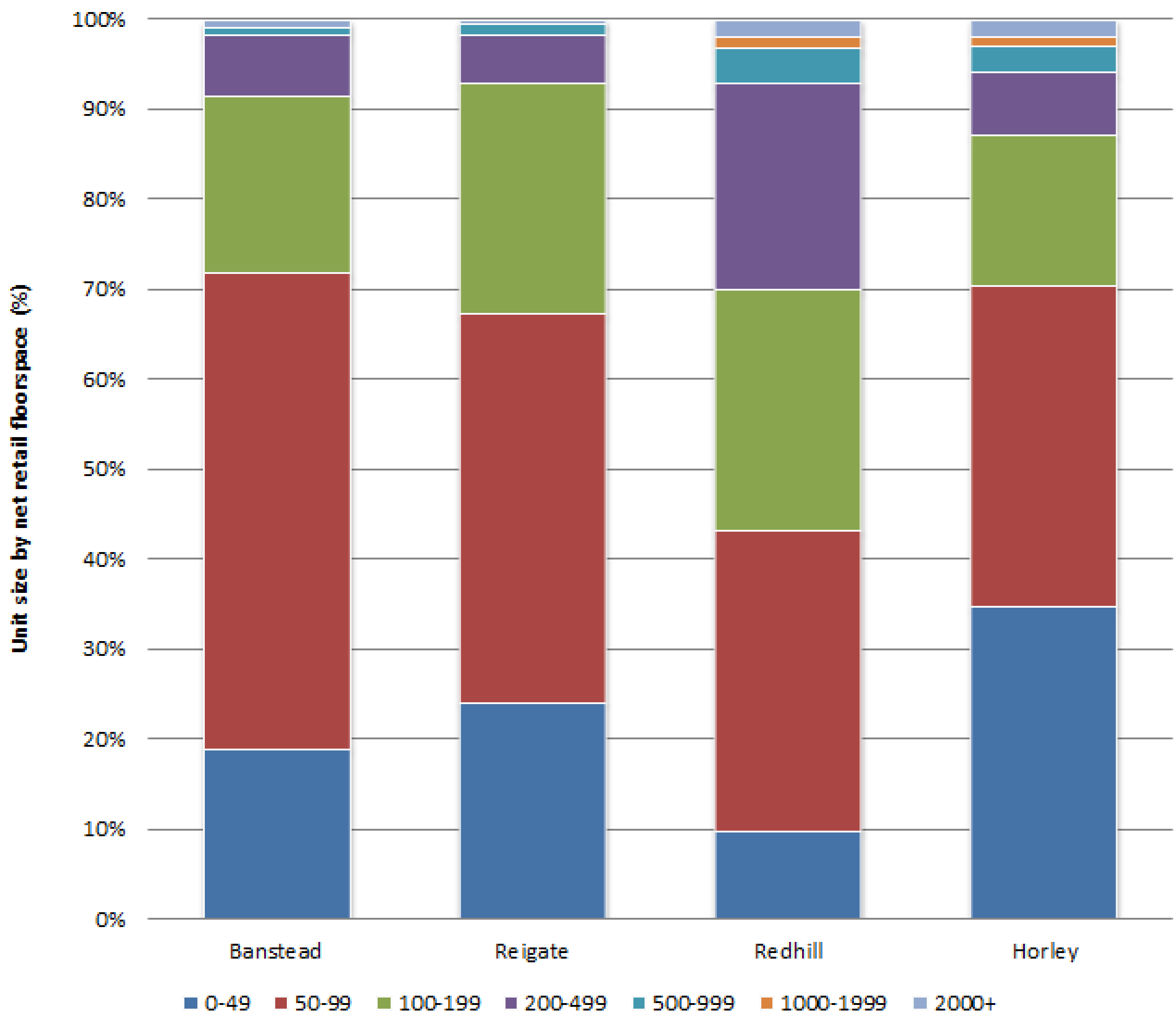
Highlighting its position as the borough's primary town, almost half (48%) of the floorspace is in Redhill. Reigate has 20% followed by Horley (18%). Banstead is the borough's smallest town centre accounting for 14% of the total retail floorspace. Just over 30% of the units are located in Redhill with a similar proportion in Reigate. The remainder are split relatively evenly between the two smaller town centres of Banstead and Horley.

Figure 1 Distribution of Town centre Retail Units & Floorspace



Redhill has the greatest percentage of retail units of 100sqm or larger (57%) whilst Banstead, Horley and Reigate have greater proportions under 100sqm (72%, 70% and 67%). This reflects the different roles of the town centres.

Figure 2 Breakdown of Town centre Units by Net Retail Floorspace



Overall Trends – Key Messages

National Retail Trends

According to Price Waterhouse Coopers, 2017 has been a tough year for UK retailers, with closures outnumbering new openings. Some sectors have however seen a growth, with beauty products, cafés and ice cream parlours opening the greatest proportion of new stores in 2017.

The Local Data Company supports the findings, also identifying pubs and banks as those with most closures (2 a day across the UK). Overall, the vacancy rate at the end of 2017 remains unchanged from the previous year at 11.2%, after dropping temporarily to 11% halfway through 2017. Comparison retail saw the greatest fall in numbers (-3,057), followed by service (-1,563) and convenience (-806).

Retail parks remain the most desirable location, the only one that experienced a rise in numbers of occupied units, followed by stand-alone shops, high street and shopping centres, all recording a fall in their occupancies (The Local Data Company).

The consumer outlook remains positive with almost three quarter of respondents predicting to spend more or the same as they did last year. Online shopping continues to play an important role, with 25% of consumers using a PC and 22% a mobile phone as a frequent (daily/weekly) shopping method. The high street however remains a firm favourite accounting for 41% of all regular shopping (Global Consumer Insights Survey, Price Waterhouse Coopers).

Borough Key Messages

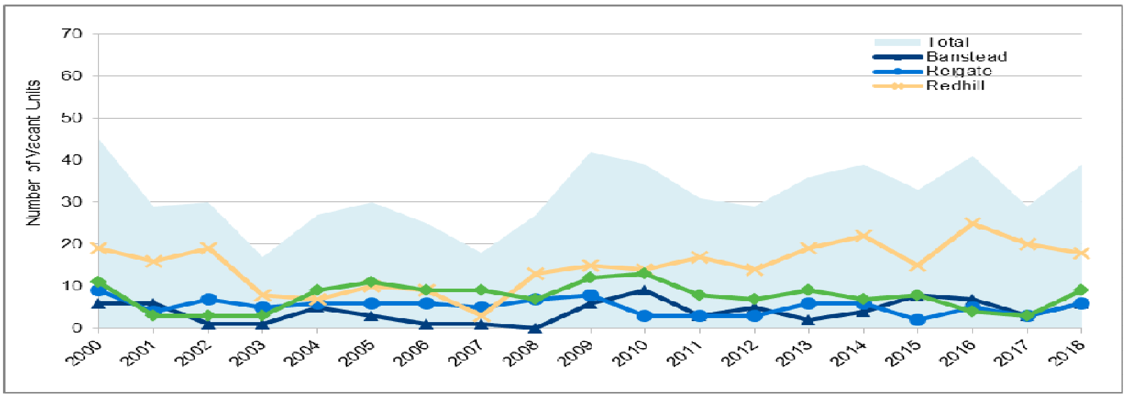
- **Vitality:** A1 remains the dominant use within the borough's town centres; within the past twelve months there has been a marginal decrease in the proportion of A1-A5 units (96.3% to 96.1%) within which the proportion of A1 units has decreased (69.0% to 66.7%).
- **Retail Uses:** Comparison retail occupies 35.6% of all units within the borough's town centres. Over a third of these units are clothing, footwear & accessories premises and almost half of these are located in Reigate (46%). Services occupy a further 31.7% of the total units within the borough of which more than a quarter are hair & beauty premises (27%).
- **Retail Composition:** The composition of each of the town centres suggests that they are well matched to fulfil their individual role within the hierarchy as evident in Banstead and Horley, which both have higher proportions of convenience and service-based retail, whilst Reigate and Redhill have higher proportions of comparison retail.
- **Vacancy Rate:** Vacancy rate has risen (5.1% to 6.9%) due to an increase in the number of vacant units (29 to 39). The borough vacancy rate falls significantly below the national average of 12.5%. In this monitoring period, Redhill has experienced a fall in the vacancy rate (11.7% to 10.6%), whilst the other three areas saw an increase: Banstead (2.5% to 5.1%), Reigate (1.7% to 3.4%) and Horley (2.9% to 8.6%).
- **New Occupiers:** 30 new occupiers have moved into the four town centres within the past year: Reigate saw the greatest increase (13), Horley saw the least (2).
- **Planning Permissions:** There are currently 24 planning permissions which have the potential to deliver a net gain of 624sqm of floorspace. Of these planning permissions 9 are under construction (-2,040sqm) and a further 15 are not started (+2,664sqm).

Vacancies & New Occupiers

Vacancy Trend

Within the monitoring period the number of vacant units has increased (29 to 39): Redhill was the only town which recorded a fall (20 to 18), whilst all other towns saw increases, Banstead 3 to 6 units, Reigate 3 to 6 units and Horley 3 to 9 units.

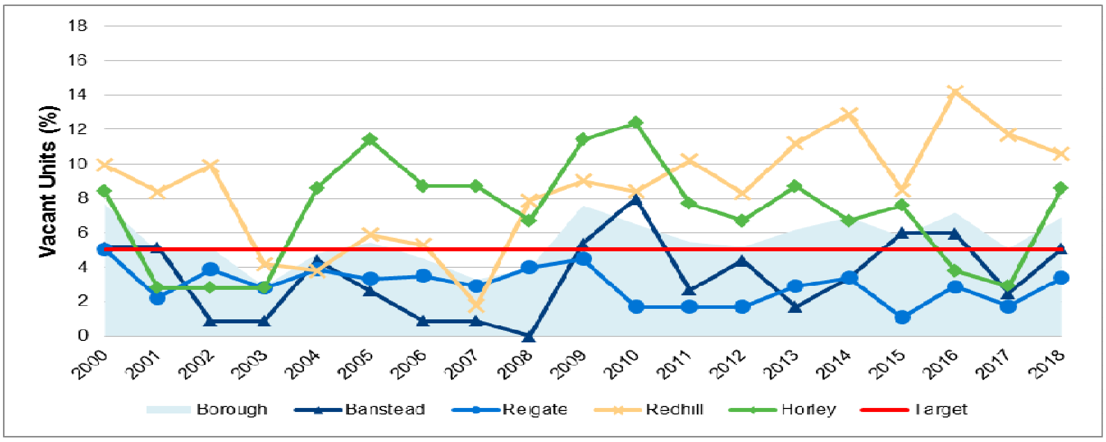
Figure 3 Number of Vacant Units (2000-2018)



Within the last monitoring period, the borough's vacancy rate has risen from 5.1% to 6.9%.

The borough has a vacancy target of 5%: the only town remaining below this target is Reigate with 3.4%. Banstead has risen just above the target with 5.1%, whilst Horley recorded most significant increase from 2.9% to 8.6%. Despite having the largest proportion of vacant units within the borough, Redhill was the only town that has seen a fall in vacancy rate from 11.7% to 10.6%.

Figure 4 Percentage Vacancy Rate (2000-2018)



Vacant frontage is also an important consideration as vacant units with large frontages will have a disproportionate visual impact. Within the last twelve months vacant frontage increased from 5.1% to 5.8%. Vacant floorspace also increased from 3.0% to 4.6%.

Table 1 Summary of Current Vacancy Position

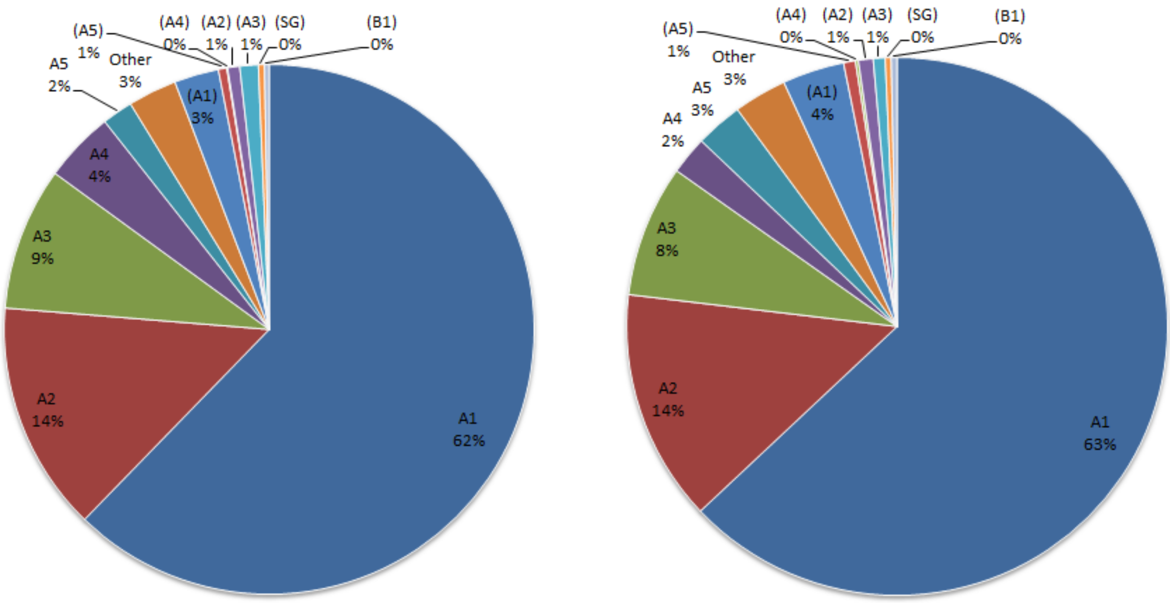
	Vacant	Vacancy Rate
Units/Premises (No.)	39	6.9%
Frontage (Metres)	309	5.8%
Floorspace (Sqm)	4,503	4.6%

Use Classes

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

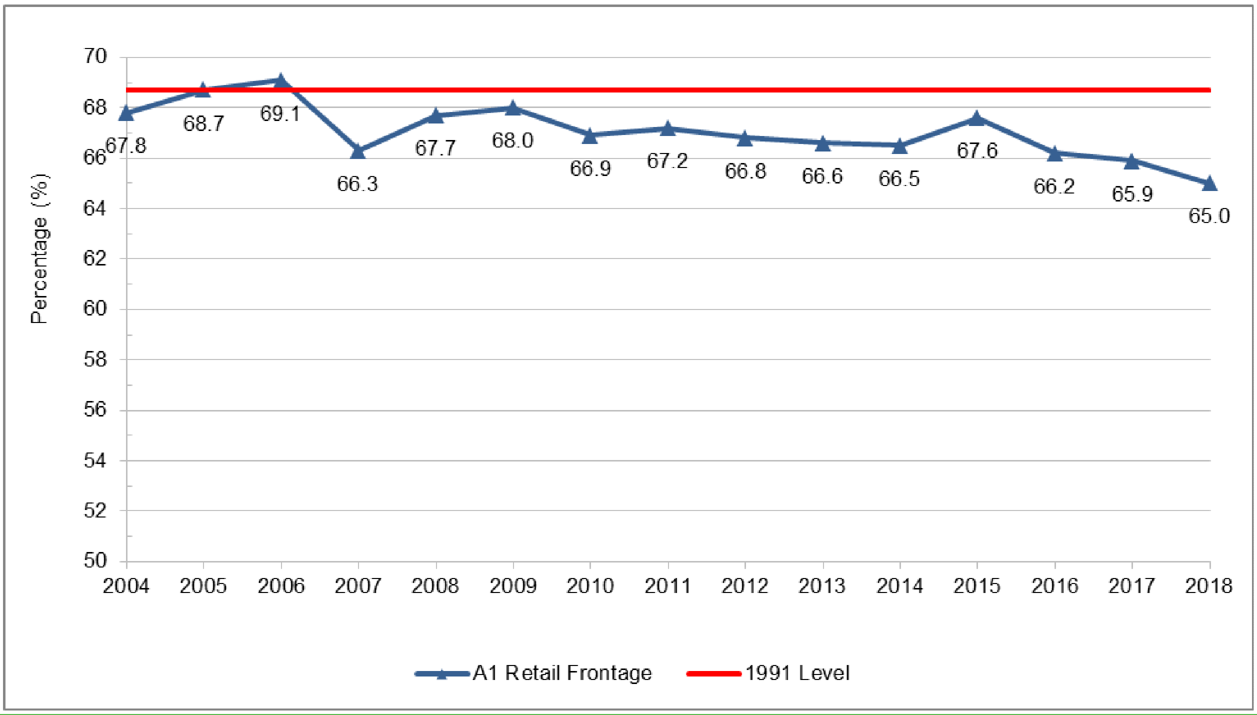
The majority of units across the town centres fall within A1 to A5 use (96.1%) of which 66.7% are A1 (this compares to 96.3% and 69.0% previously).

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



On the whole policies aimed at protecting against excessive loss of A1 units have been successful. In 1991, A1 represented almost 69% of total frontage across the four town centres and although there has been a slight fall over recent years, currently A1 represents 65.0% of the total occupied frontage.

Figure 6 A1 Retail in Town Centre Units (2004 – 2018)



Retail Offer

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

Within the last twelve months there has been very little change to the overall proportion of retail offer. Comparison retail saw their share in the borough fall by 1% and the number of vacant units increased by nearly 2%. All other retail offers have performed consistently in-line with the previous monitoring period.

Convenience retail continues to account for the lowest percentage of retail units (8.5%) but makes up nearly a third of the floorspace (28%), this is largely due to the dominance of larger format supermarkets such as Waitrose in Horley, Sainsbury's in Redhill and Morrisons in Reigate.

Services continue to make up the second highest percentage of units (31.7%) however they only take up 14.1% of the retail floorspace, suggesting that they tend to occupy smaller units.

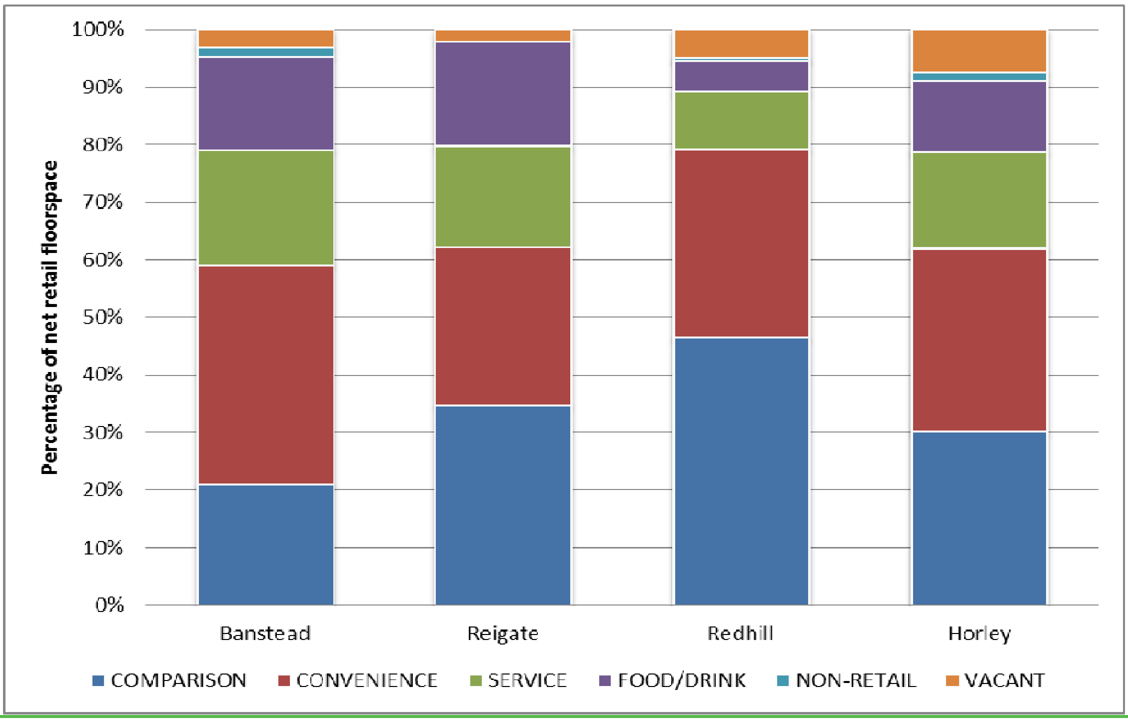
Table 2 Breakdown of Retail Offer

	Units	Floorspace(sqm)
Comparison	202 (35.6%)	36,913 (37.7%)
Convenience	48 (8.5%)	31,543 (32.2%)
Service	180 (31.7%)	13,791 (14.1%)
Food & Drink Leisure	85 (15.0%)	10,484 (10.7%)
Non-Retail	13 (2.3%)	682 (0.7%)
Vacant	39 (6.9%)	4,503 (4.6%)
Total	**567**	**97,916**

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

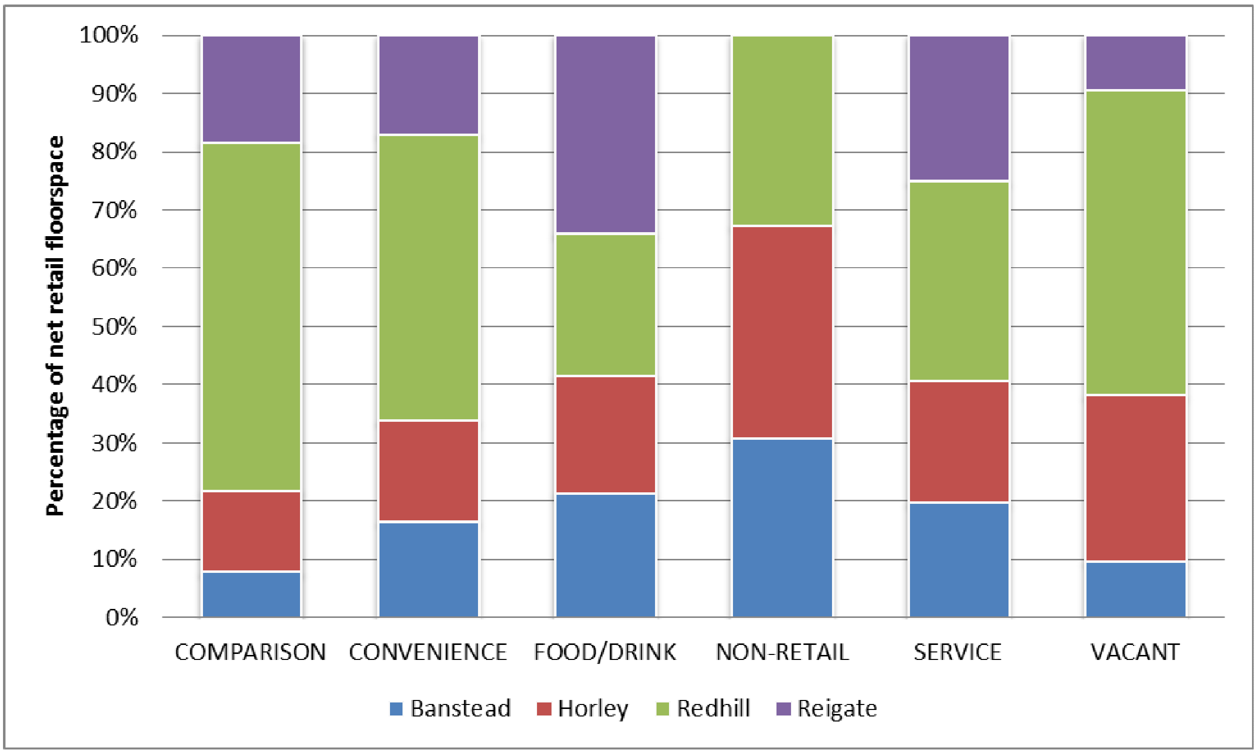
Specifically reflecting the different roles of the town centres, the diagram shows that the majority of the floorspace in Redhill is comparison (46%), similarly in Reigate (35%). Convenience occupies the greatest percentages in Banstead and Horley (38% and 32%).

Figure 7 Retail Offer by Centre



The graph below details the retail offer within the town centres, it shows that Redhill has the greatest percentage of net retail floorspace for all the retail categories apart from food & drink leisure for which Reigate has the greatest proportion (34%).

Figure 8 Retail Offer by Retail Category



Main Retail Categories

Despite changes within the individual town centres, within the monitoring period there has been very little overall change to the proportion of each type of retail. Comparison retail continues to occupy the greatest proportion of the units (35.6%) followed by services (31.7%). Food & drink leisure occupies a further 15%.

Almost two-thirds (65%) of comparison retail is clothing, footwear & accessories (35%), home & DIY (16%) and charity/ second-hand (14%). Noteworthy, almost half (46%) of the clothing, footwear & accessories providers are located in Reigate.

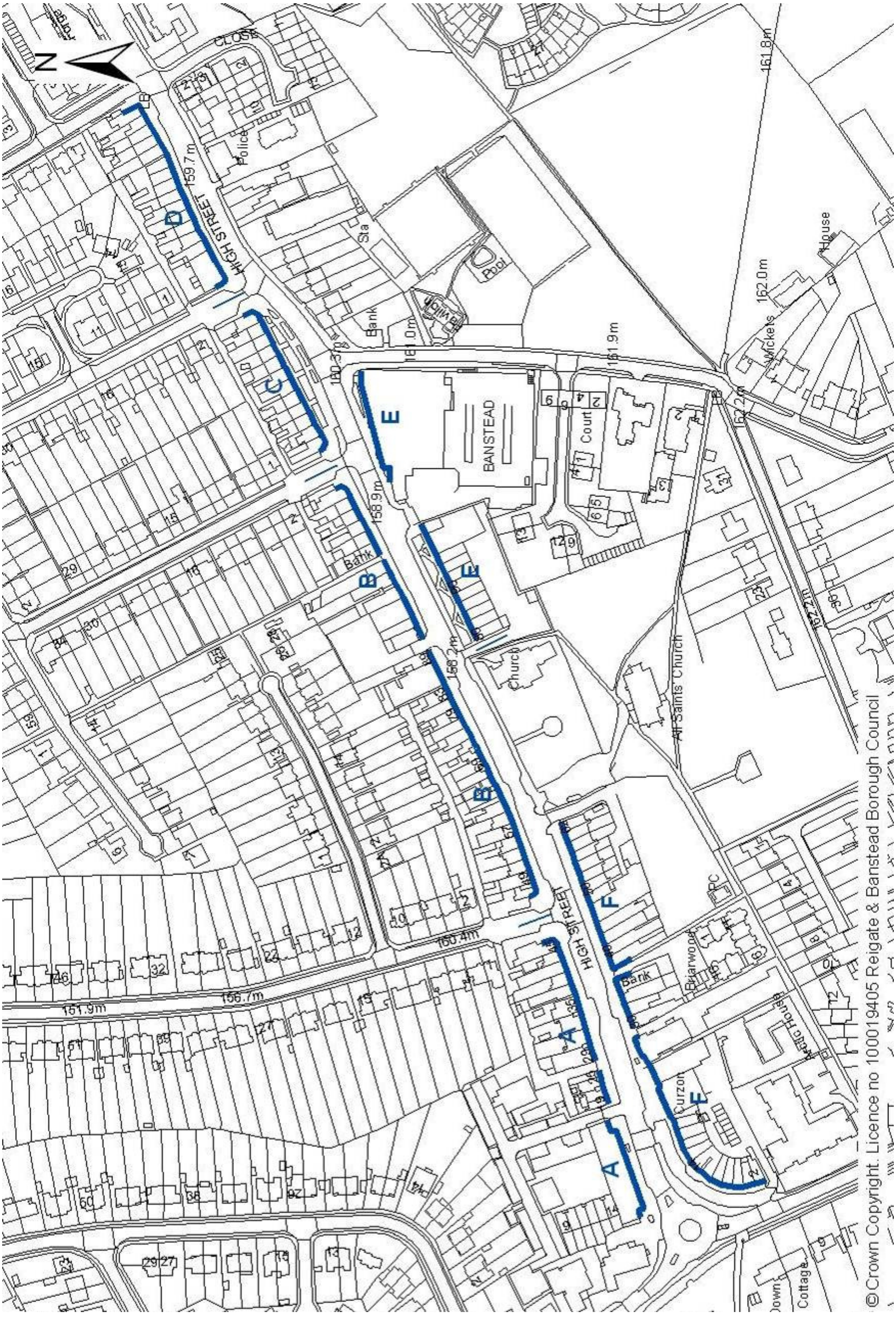
Together hair & beauty providers and estate agents occupy almost half of the service units within the borough (51% - 27% and 24%). Both the number of hair & beauty providers and the number of estate agents are relatively evenly spread across the borough's four town centres, with Reigate leading in both categories with 31%.

Nearly two-thirds of the food & drink establishments within the borough are restaurants (38%) or café/sandwich bars (28%). Reigate has the greatest number of both (13 and 7); Redhill has the fewest restaurants (4) and Horley and Banstead have the fewest café/sandwich bars (5). Conversely, more than a third of the take-aways are located in Horley (6).

Table 3 Detailed Breakdown of Retail Categories (Units)

Comparison	Banstead	Reigate	Redhill	Horley	TOTAL
Clothing, Footwear & Accessories	10	33	21	7	71
Bookshops & Stationers	1	5	5	1	12
Home & DIY	10	13	4	5	32
Electronics & Technology	1	3	7	0	11
Charity/Second-Hand	8	6	6	9	29
Toys, Games & Sports	0	3	2	0	5
Other Comparison Retail (e.g. Gifts, Florists)	5	13	20	4	42
Total Comparison	**35 (29.9%)**	**76 (43.4%)**	**65 (38.2%)**	**26 (24.8%)**	**202 (35.6%)**
Convenience					
Food/Supermarket	9	6	6	5	26
Newsagents	1	2	3	3	9
Chemist/Pharmacy	4	2	4	3	13
Total Convenience	**14 (12.0%)**	**10 (5.7%)**	**13 (7.6%)**	**11 (10.5%)**	**48 (8.5%)**
Service					
Travel Agents	1	1	3	0	5
Hair & Beauty	14	15	12	8	49
Opticians	6	5	5	1	17
Banking	4	7	11	4	26
Estate Agents	7	13	10	12	42
Bookmakers	2	1	5	2	10
Dry Cleaning	2	3	2	3	10
Other Services (e.g. Employment, Repairs)	6	6	4	5	21
Total Service	**42 (35.9%)**	**51 (29.1%)**	**52 (30.6%)**	**35 (33.3%)**	**180 (31.7%)**
Food & Drink Establishments					
Restaurant	9	13	4	6	32
Take-away	5	4	1	6	16
Café/Sandwich Bar	5	7	7	5	24
Pub/Club	0	6	4	3	13
Total Food & Drink Establishments	**19 (16.2%)**	**30 (17.1%)**	**16 (9.4%)**	**20 (19.0%)**	**85 (15.0%)**
Non A Class	1 (0.9%)	2 (1.1%)	6 (3.5%)	4 (3.8%)	13 (2.3%)
Vacant	6 (5.1%)	6 (3.4%)	18 (10.6%)	9 (8.6%)	39 (6.9%)
TOTAL	**117**	**175**	**170**	**105**	**567**

Banstead Village



Commentary

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

Vacancies & New Occupiers

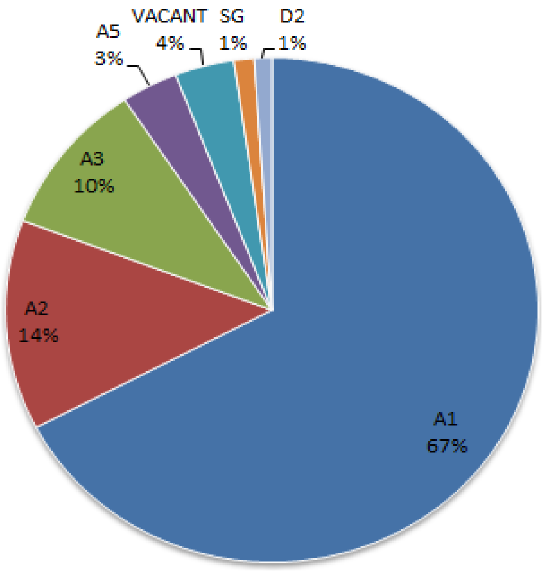
There have been a number of occupier changes: 4 new occupiers have moved into the town centre and 9 have left. This has led to an increase in the number of vacant premises (3 to 6) and correspondingly a rise in the percentage of vacant units from 2.6% to 5.1%.

	Vacancy Rate
% of units	5.1%
% of frontage	3.6%
% of net retail floorspace	3.2%

Vitality

Primary retail uses (A1-A5) dominate Banstead's retail frontage, accounting for 94% of the total frontage. Specifically A1 retail makes up 67% of the retail frontage which is slightly below the 75% threshold requirement set out in the Borough Local Plan.

Figure 8 Breakdown of Use Classes (Frontage)



Services occupy the greatest number of units (36%), followed by comparison (30%) and food & drink (16%). Convenience occupies more than a third of retail floorspace, followed by comparison (21%) and services (20%). Comparison retail occupies a higher proportion of floorspace than units due to two large food stores (Waitrose 3,114sqm and Marks & Spencer's 580sqm).

Table 4 Retail Offer

	Units	Net Floorspace (sqm)
Comparison	35 (30%)	2,864 (21%)
Convenience	14 (12%)	5,198 (38%)
Service	42 (36%)	2,714 (20%)
Food & Drink Leisure	19 (16%)	2,233 (16%)
Non-Retail	1 (1%)	210 (2%)
Vacant	6 (5%)	432 (3%)
Total	**117**	**13,651**

Development & Use Class Changes

Within this monitoring period, three planning applications were completed within Banstead, resulting in a net increase of 101sqm of commercial floorspace.

- 16/01567/F - 43 High Street, change of use and extension from A1 to part A1/part A3, net loss of A1 33sqm and net gain of A3, 90 sqm.
- 17/00213/CU – 139 High Street, change of use from a shop A1 to nail bar (SG)
- 15/00579/F - Giles Lesley Florist, 89 High Street, Construction of a new 3 storey building, accommodating A3 unit to ground floor, loss of 90sqm (A1), gain of 134sqm (A3)

One planning permission is under construction; having the potential to deliver net 56sqm of commercial floorspace:

- 16/00882/F – Oscars 59 High Street, Demolition of existing single storey kitchen and external WC buildings to the rear and provision of a new single storey extension to increase the existing retail unit floor area. A1 floorspace to increase by 56sqm.

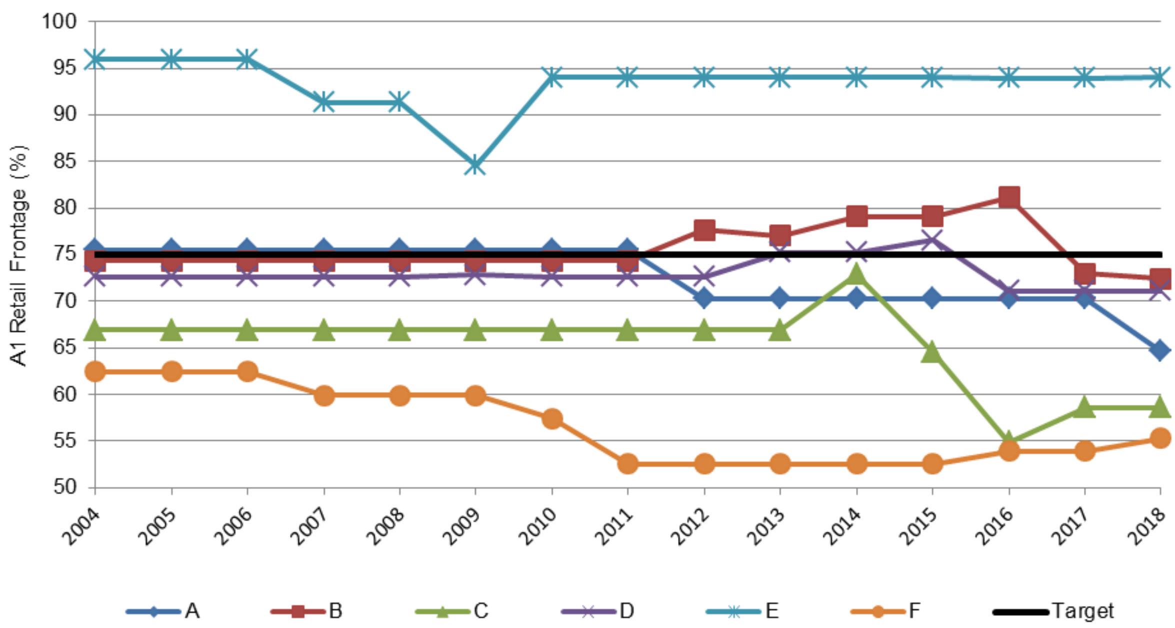
There are two outstanding planning permissions; if delivered they will increase commercial floorspace by 58sqm:

- 14/02053/F – 125 High Street, rear extension to increase A1 by 43sqm
- 15/00625/F – 139 High Street, extension to increase A1 by 15sqm

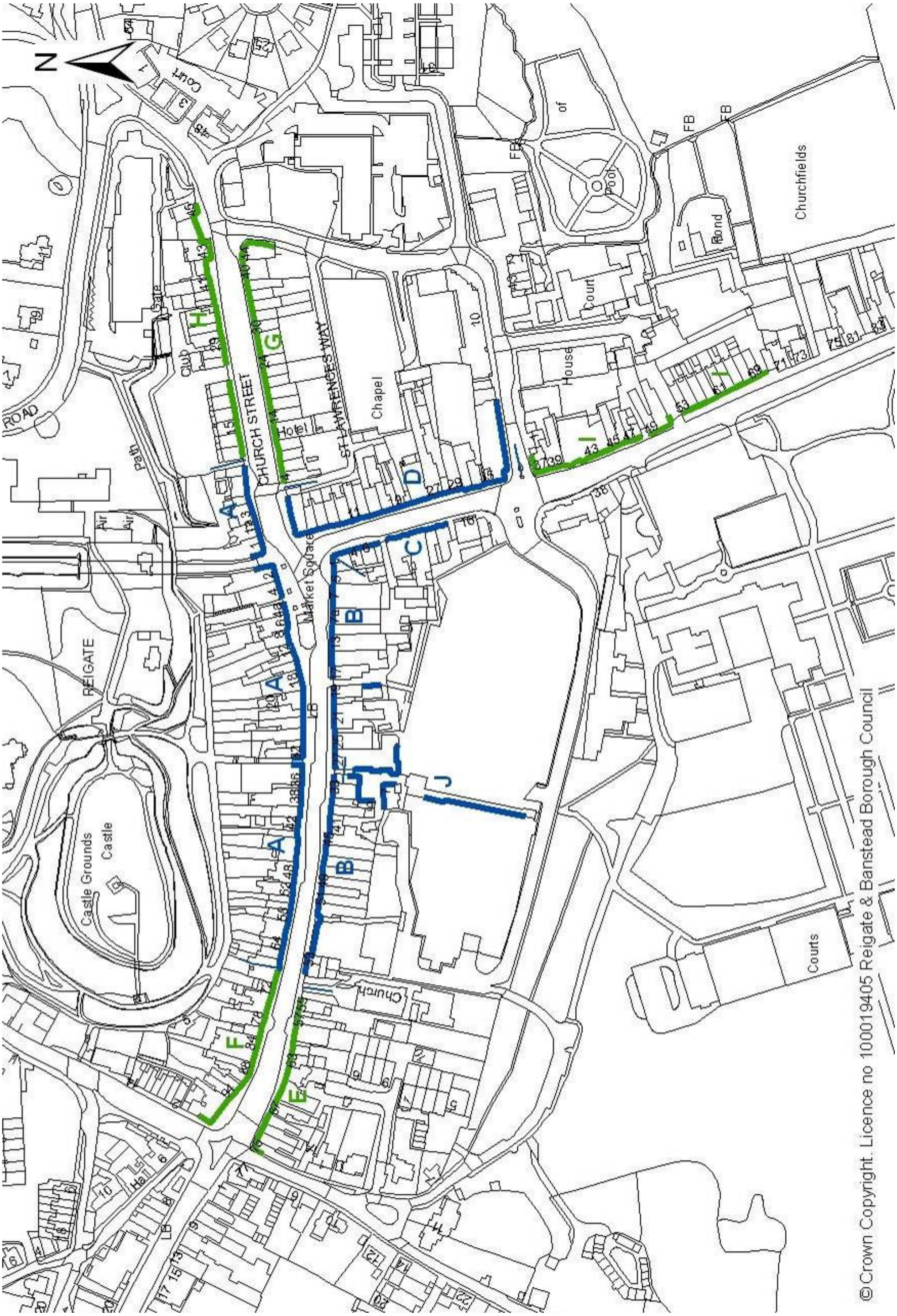
Frontages

Banstead continues to have a strong A1 retail frontage. Frontage E continues to exceed the 75% threshold requirement at 94%, whilst frontages B and D continue to hover just below 75%. Once again frontage F falls considerably below the A1 requirement (55%) due to having a number of large fronted A2 and A3 units but has recorded a consistent A1 frontage in recent years.

Figure 9 Banstead Frontage A1 Retail Trend



Reigate Town Centre



Commentary

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

Vacancies & New Occupiers

Within the last twelve months there has been an increase in the number of vacant units (3 to 6), however a decrease in both vacant frontage (5.7% to 2.7%) and vacant floorspace (4.9% to 2.1%).

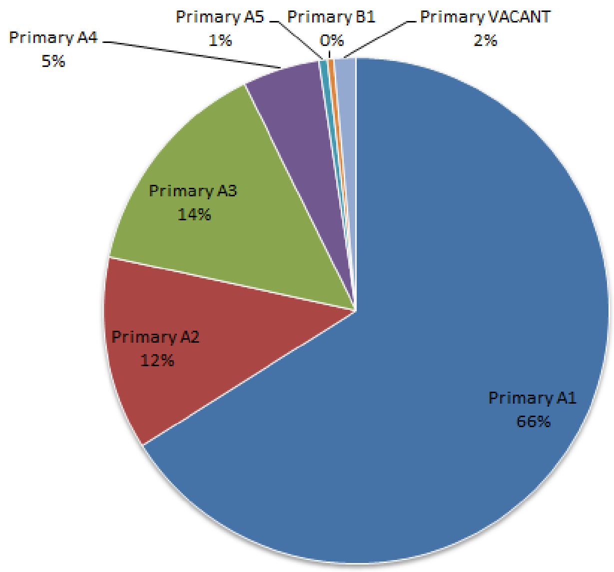
13 new occupiers have moved into the town centre within this monitoring period, 17 have left and 2 have moved into different premises.

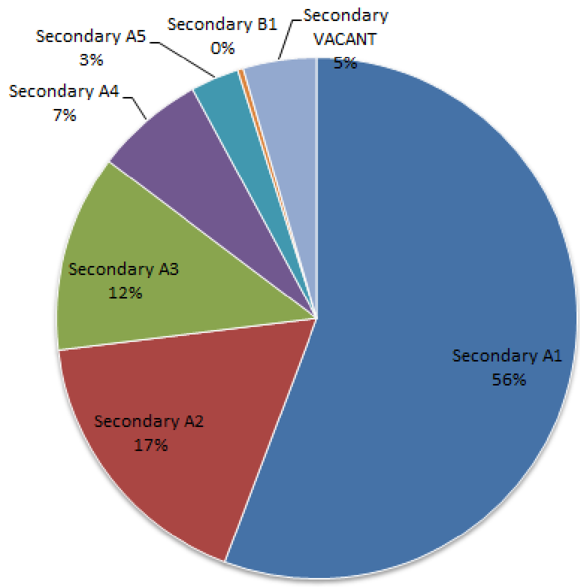
	Vacancy Rate
% of units	3.4%
% of frontage	2.7%
% of net retail floorspace	2.1%

Vitality

Reigate continues to have the highest proportion of frontage of all 4 town centres falling within A1 to A5 use classes (97%). Significantly, the proportion is consistent across both the primary and secondary frontages. However, both the primary and secondary frontages fall below the A1 threshold set out in the local plan, the primary frontage having 66% (against 80% target) and the secondary frontage having 56% (against 66% target).

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





Reigate has the highest proportion of food & drink leisure units and floorspace within the borough (17% and 18%). The majority are located within the town's secondary retail frontage and many are of high quality, adding to the vitality and active evening environment.

The centre continues to have the highest percentage of comparison units of any town centre in the borough (43%). This is largely due to the high number of boutique shops selling specifically homewares, gifts, clothing, footwear and accessories. Reigate also has a high proportion of service-based premises (29%) including estate agents, hair and beauty salons.

Table 5 Retail Offer

	Units	Net Floorspace (sqm)
Comparison	76 (43%)	6,847 (35%)
Convenience	10 (6%)	5,378 (27%)
Service	51 (29%)	3,471(18%)
Food & Drink Leisure	30 (17%)	3,572 (18%)
Non-Retail	2 (1%)	0 (0.0%)
Vacant	6 (3%)	421 (2%)
	175	**19,689**

Development & Use Class Changes

Within the last twelve months there have been 3 developments completed within Reigate town centre, leading to a commercial net loss of 490sqm:

- 16/01161/F – Former Knights and Sons, 8-10 Bell Street: Subdivision of ground floor into two A1 units and conversion of upper floor into residential dwellings, resulting in a loss of 495sqm of commercial floorspace
- 15/02290/CU – 33 Bell Street: Change of use from A1 to A3
- 15/02424/CU – 57 Bell Street: Change of use from A3 to A5; loss 99sqm (A3), gain 104sqm (A5)

There are also five permissions not yet started, these have the potential to deliver a net loss of 592sqm of commercial floorspace:

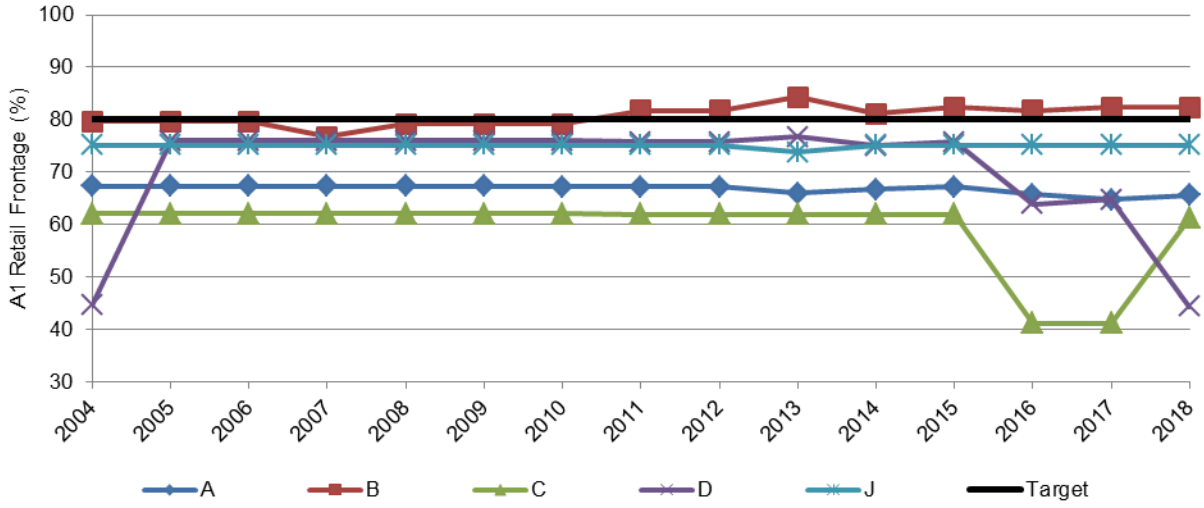
- 15/02835/F – 9A Castelfield Road: Erection of B1 office extension, gain 218sqm (B1(A))
- 16/02497/PAP – 2 Church Street: Office to residential permitted development, loss 167sqm (B1(A))
- 16/02498/PAP – 3A-7A Bell Street: Office to residential permitted development, loss 120sqm (B1(A))
- 16/00428/F – 4-10 Church Street: - Extension of commercial space and addition of residential dwellings, gain 292sqm (A2), gain 54sqm (A5)
- 16/01324/P – 99 Bell Street: Office to residential permitted development, loss 869sqm B1 (A))

Frontages

Primary

Frontage B (82%) continues to be the only primary frontage to exceed the 80% threshold for A1 retail, although frontage J is only slightly below target with 75%. Frontage C has returned to its previous levels from 2015, following the re-opening of the former Knights store, now housing Oliver Bonas and Waterstones stores. Notably, there has been a sharp drop in the proportion of A1 within frontage D, largely due to the opening of a large, previously vacant unit as a Wagamama restaurant (A3).

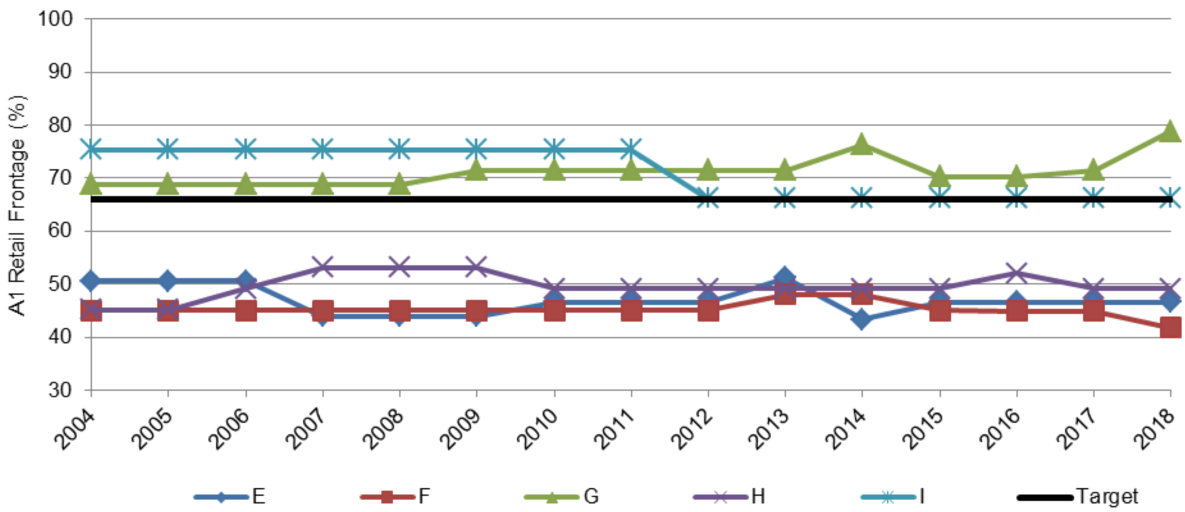
Figure 11 Reigate Primary Frontage A1 Retail Trend



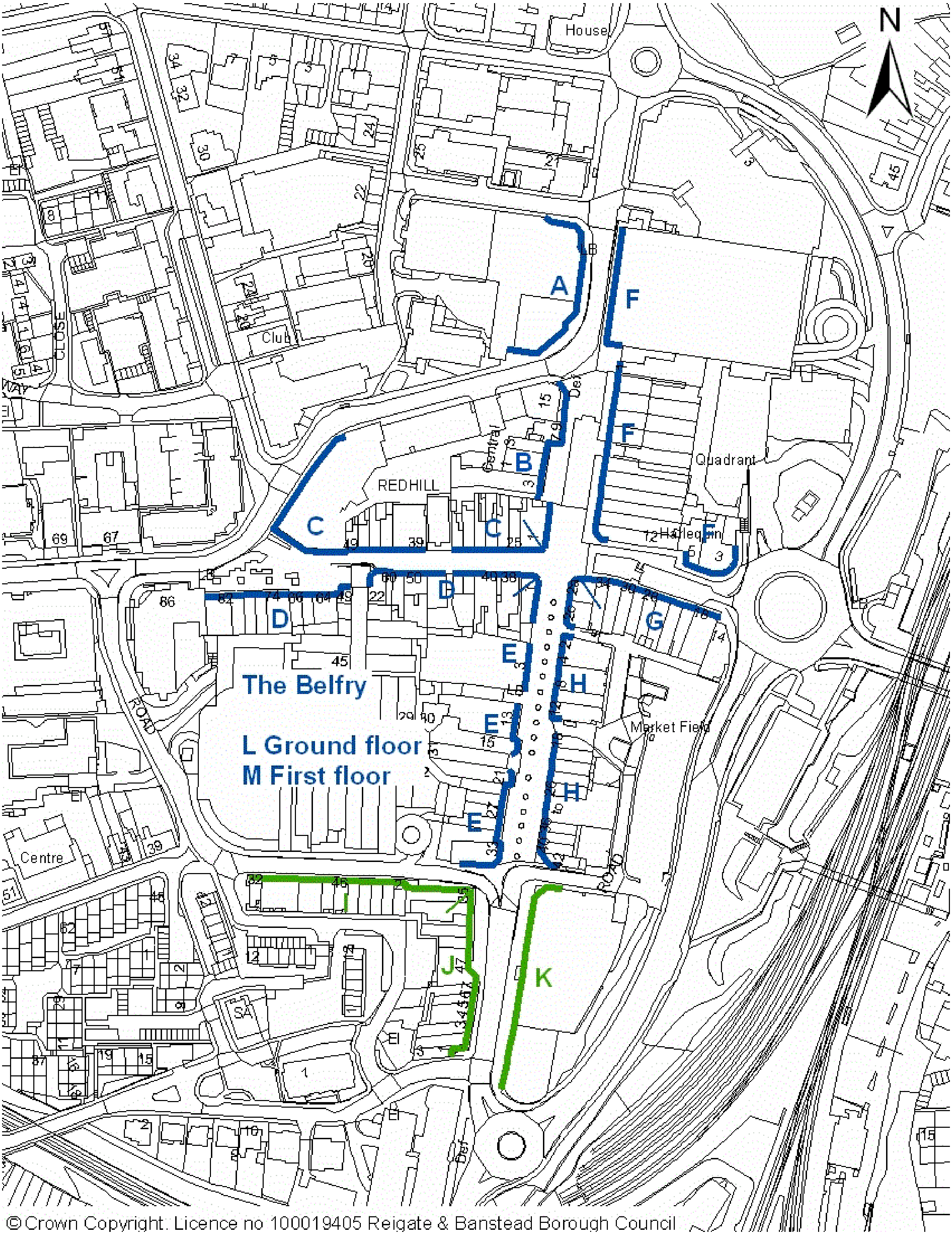
Secondary

There has been little change to the proportion of A1 frontage within the secondary frontage: frontages G and I continue to be only frontages exceeding the 66% threshold (79% and 66%) whilst frontages E, F and H continue to fall below (47%, 42% and 49%). One notable increase of A1 frontage was within frontage G (72% to 79%), primarily due to a closure of two A3/A5 units.

Figure 12 Reigate Secondary Frontage A1 Retail Trend



Redhill Town Centre



Commentary

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

Redhill has the largest retail frontage of the borough's four town centres and offers the greatest number of retail units and retail floorspace. Retail activity is focussed around the main pedestrianised high street which runs from north to south, with a series of smaller shopping streets running off this. The town is home to the Belfry Shopping Centre which has recently gained H&M as an occupier following the redevelopment of 7 units to form 1 large unit.

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

Vacancies & New Occupiers

There have been a number of occupier changes within the last twelve months, 11 occupiers have moved into Redhill town centre, 11 have left and 4 have relocated to new units (Argos, Sunrise Nails, Robert Dyas and United Oriental & Food Market).

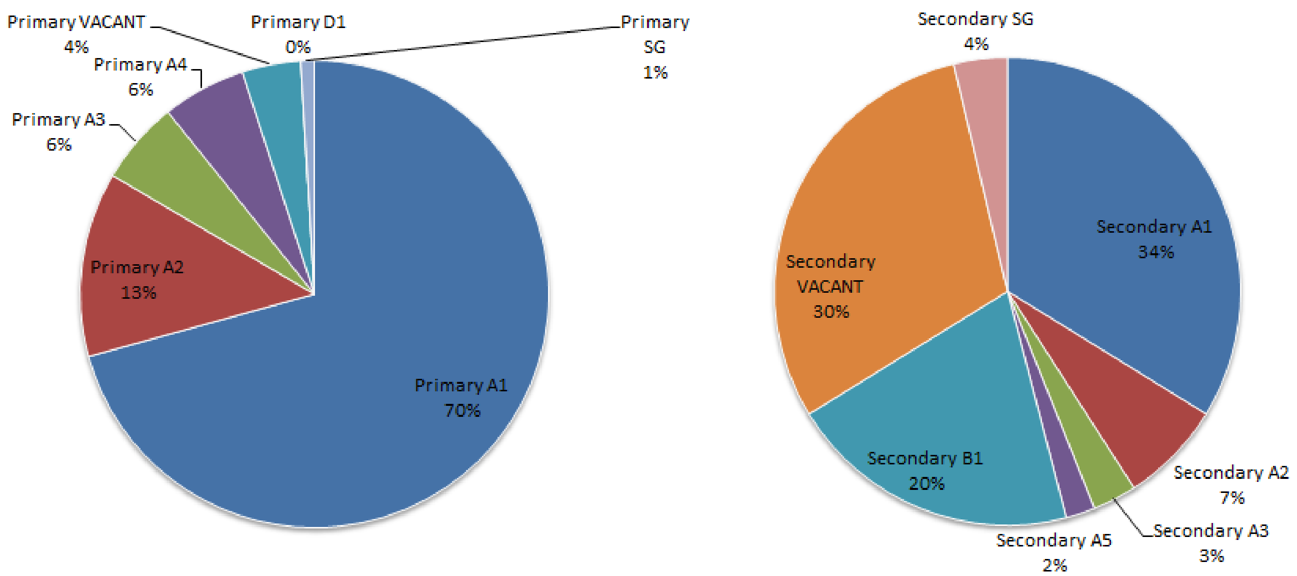
Redhill continues to have the greatest number of vacant premises of all the boroughs town centres. Within the monitoring period the number of vacant units has decreased (20 to 18), vacant floorspace increased (4.6% to 5%) and vacant frontage decreased (9.7% to 8%).

	Vacancy Rate
% of units	10.6%
% of frontage	8%
% of net retail floorspace	5%

Vitality

A1 to A5 uses constitute around 95% of the primary frontage and 46% of the secondary frontage. Redhill's primary and secondary frontages both fall below the A1 requirement, with primary frontage having 70% (against 80% target) and secondary frontage having 34% (against 66% target). The town's secondary frontage is predominantly made up of office frontage and includes the Kingsgate office development which was previously retail frontage. As part of the Development Management Plan retail frontages will be reviewed.

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



As would be expected for a primary centre and sub-regional destination, comparison retail remains the dominant retail offer, amounting to nearly half of the floorspace within the town centre. Convenience retail follows second with nearly 33%, largely due to a substantial floorspace increase of Sainsbury's supermarket.

Conversely the proportion of food & drink leisure floorspace in Redhill is considerably lower than the borough's other three centres. Food & drink Leisure floorspace takes up 5.4% of the total floorspace in Redhill but in comparison Reigate, Horley and Banstead have around twice as much (18%, 12% and 16%).

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

Table 6 Retail Offer

	Units	Net Floorspace (sqm)
Comparison	65 (38%)	22,034 (46%)
Convenience	13 (8%)	15,534 (33%)
Service	52 (30%)	4,721 (10%)
Food & Drink Leisure	16 (9%)	2,571 (5%)
Non-Retail	6 (4%)	224 (1%)
Vacant	18 (11%)	2,367 (5%)
Total	**170**	**47,451**

Developments & Use Class Changes

As part of the regeneration of the town, one major application is under construction; this has the potential to deliver 335sqm of commercial floorspace:

- 14/00846/F – Former Liquid & Envy Nightclub: Mixed use redevelopment providing both retail (355sqm) and residential.

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

The following permissions were completed within the last 12 months adding a net 6,913sqm of commercial space to the town centre:

- 12/01852/F – Sainsbury's 32 London Road: Mixed use redevelopment to enlarge supermarket with the addition of Argos store (7,235sqm), Travelodge hotel and gym
- 16/00839/F – subdivision of 35 High Street into three retail units
- 16/02057/F – configuration of 2-8 Cromwell Road into 2 retail units, resulting in a loss of over 100sqm of retail space
- 15/01862/PAP3O – 22 Station Road: Permitted development office to residential (-194sqm).

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

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

There are also a number of other permissions which have not yet commenced; these have the potential to deliver a total gain of 444sqm of commercial space:

- 17/00460/F – Warwick Quadrant: Infilling of the ground floor colonnade along London Road and Station Road (511sqm) and the conversion and extension of the existing toilet to form a new retail unit (115sqm).
- 17/03013/F – 36-38 Station Road: Change of use from office/retail to residential (-107sqm)
- 18/00158/PAP – 47a Station Road: Office to residential permitted development (-75)

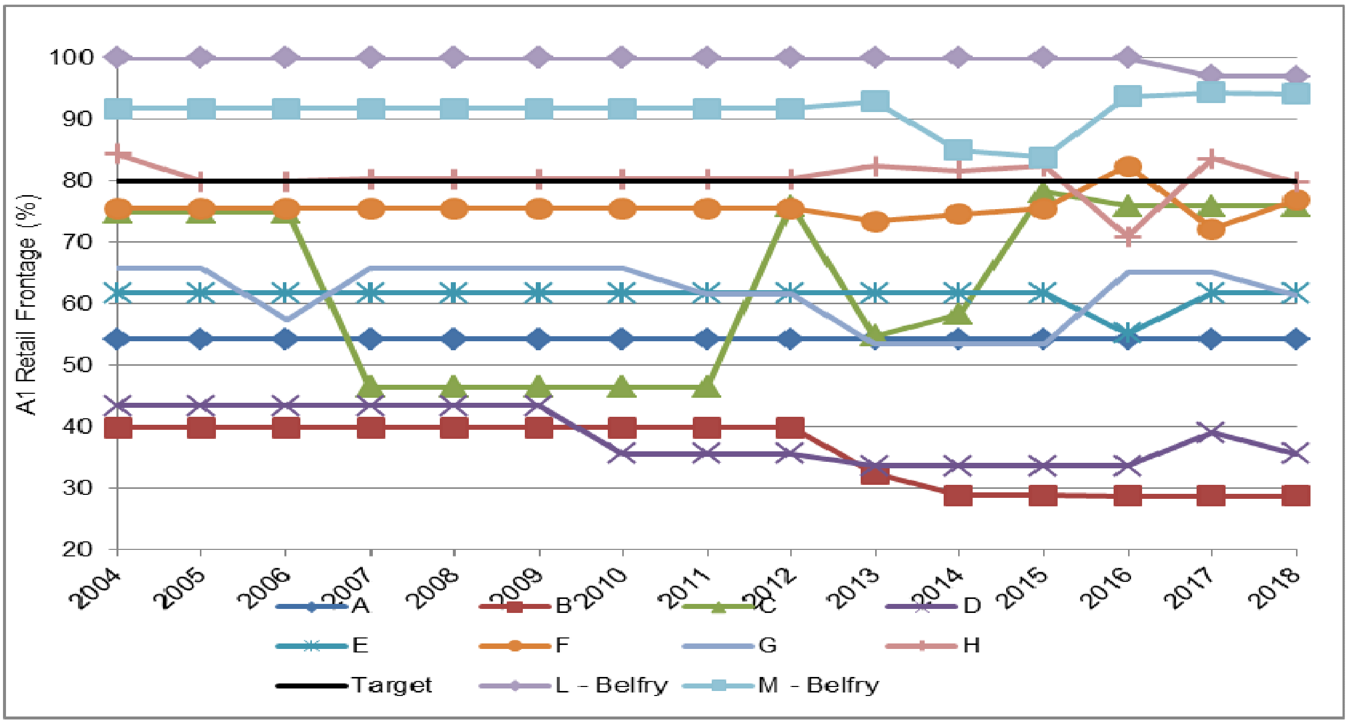
Frontages

Primary

There is considerable variation in the proportion of A1 retail falling within Redhill's primary retail frontages: frontages L and M located in the Belfry have the greatest proportion of A1 retail (97% and 94%) whilst frontage B has the lowest representation (29%).

As has been the case for many years, frontages L and M continue to exceed the 80% primary A1 retail threshold whilst frontage H (79.8%) dropped just below the threshold with frontage F and C following closely with 76.8% and 75.9% respectively. The remaining primary frontages continue to fall considerably below the 80% primary A1 retail threshold; in particular the frontages B and D both consist of less than 50%. Frontage B has a high proportion of A2 financial and professional services, whilst frontage D has an extremely diverse mix comprising A1-A4 and SG uses.

Figure 14 Redhill Primary Frontage A1 Retail Trend

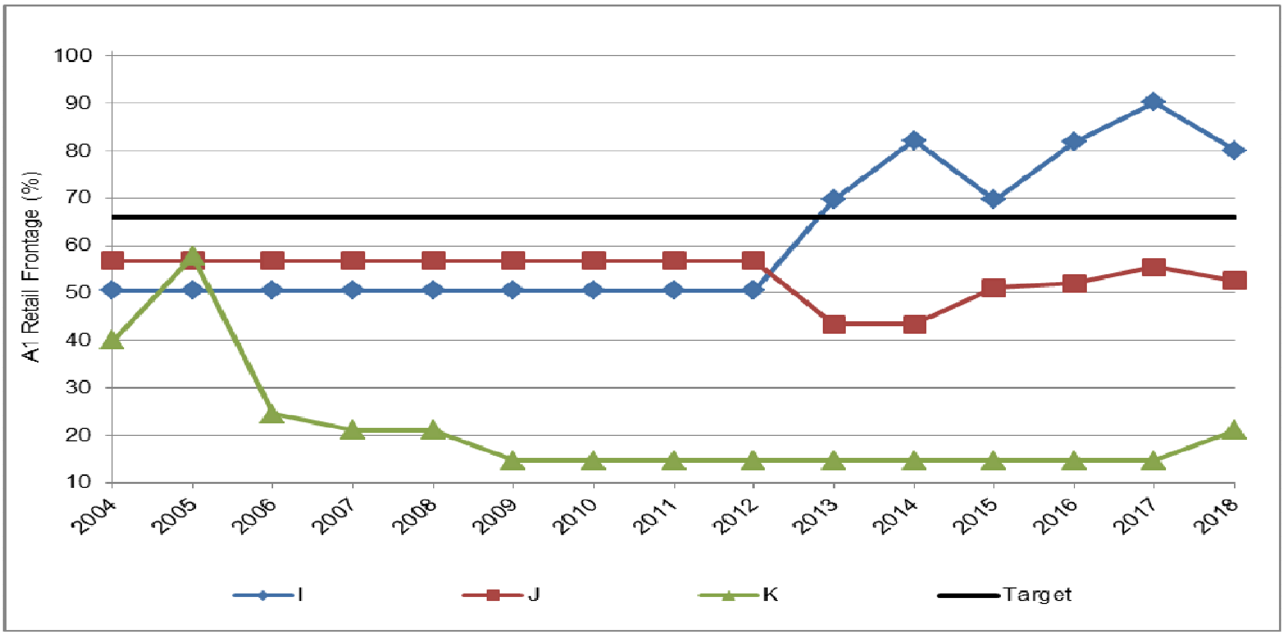


Secondary

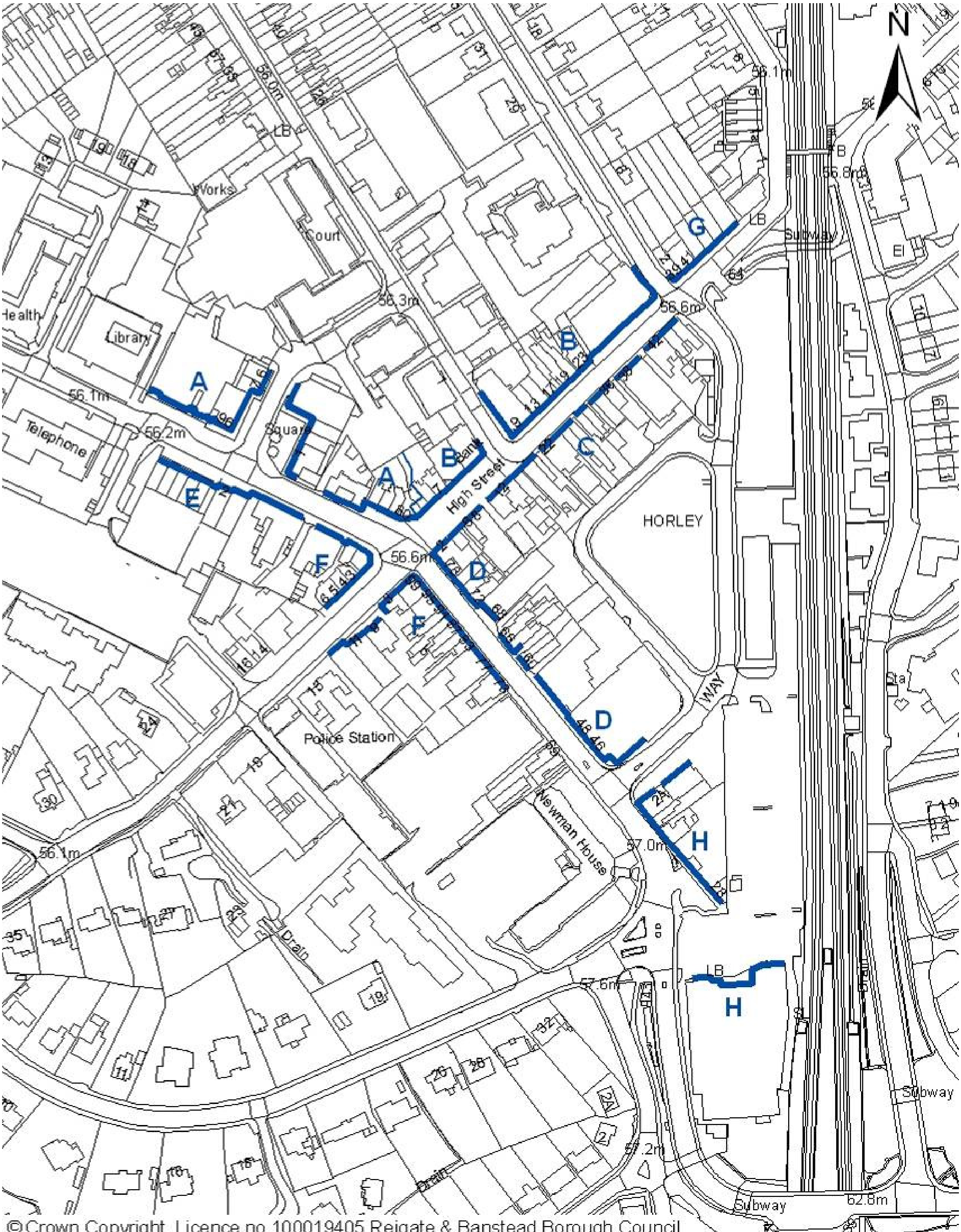
Within the last twelve months the proportion of A1 retail within frontage K increased marginally after the departure of Frankie & Bennies (A3), whilst frontage J and frontage I have both seen a slight reduction.

There is considerable variation in the proportion of A1 retail falling within Redhill's secondary retail frontages: frontage I has the greatest proportion of A1 retail (80%) but this is due to vacating businesses as the site is in the process of being cleared for redevelopment. Frontage K has the lowest representation (21%) due to Kingsgate and Red Central office developments replacing previous retail frontages with office frontage. As part of the Development Management Plan, retail frontages will be reviewed to ensure they remain relevant and robust.

Figure 15 Redhill Secondary Frontage A1 Retail Trend



Horley Town Centre



Commentary

Horley town centre is a compact district centre located at the south of the borough. It is comprised of several shopping areas oriented around the junction of Victoria Road and High Street. The main High Street is pedestrianised; towards the south there is a large Waitrose supermarket and independent department store (Collingwood Batchelor's). The town centre benefits from Horley Railway Station lying just south of the shopping centre.

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

Vacancies & New Occupiers

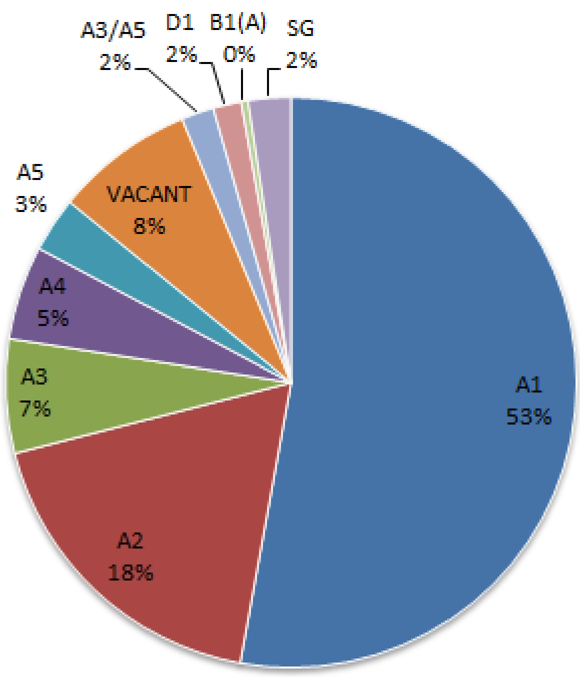
Within the last twelve months there have been several occupier changes: 2 new occupiers and 8 have left. The number of vacant units has increased from 3 to 9, vacant frontage risen (2.1% to 7.8%).

	Vacancy Rate
% of units	8.6%
% of frontage	7.8%
% of net retail floorspace	7.5%

Vitality

A1 to A5 retail frontage accounts for 88% of the total and over half is in A1 use (53%), retaining the same level as in the previous year.

Figure 16 Breakdown of Frontage by Use Class



Reflecting its role as a district centre, compared to the other town centres Horley has the 2nd greatest percentage of convenience units (10%) Banstead, the other district centre has the greatest percentage – 12%).

In comparison to the other town centres, Horley continues to have the greatest number of take-aways (6) and charity/ second-hand retailers (9, followed closely by Banstead with 8). To ensure the long-term viability this needs continual monitoring to ensure an appropriate mix is maintained.

Table 7 Retail Offer

	Units	Net Floorspace (sqm)
Comparison	26 (25%)	5,168 (30%)
Convenience	11 (10%)	5,433 (32%)
Service	35 (33%)	2,884 (17%)
Food & Drink Leisure	20 (19%)	2,109 (12%)
Non-Retail	4 (4%)	249 (1%)
Vacant	9 (9%)	1,283 (7%)
Total	**105**	**17,126**

Developments & Use Class Changes

Within the last twelve months three developments have been completed:

- 15/01275/PAP3O – Dartel House, 2 Lumley Road: Office to residential permitted development (-123sqm)
- 15/00386/CU – 19 High Street: Change of use A1 to A3 (+110sqm)
- 17/01634/F – 1 Yattendon Road: Redevelopment of current building into retail (-11sqm) and residential

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

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

There are also a number of outstanding planning permissions which if delivered would lead to a 1,611sqm loss of commercial floorspace:

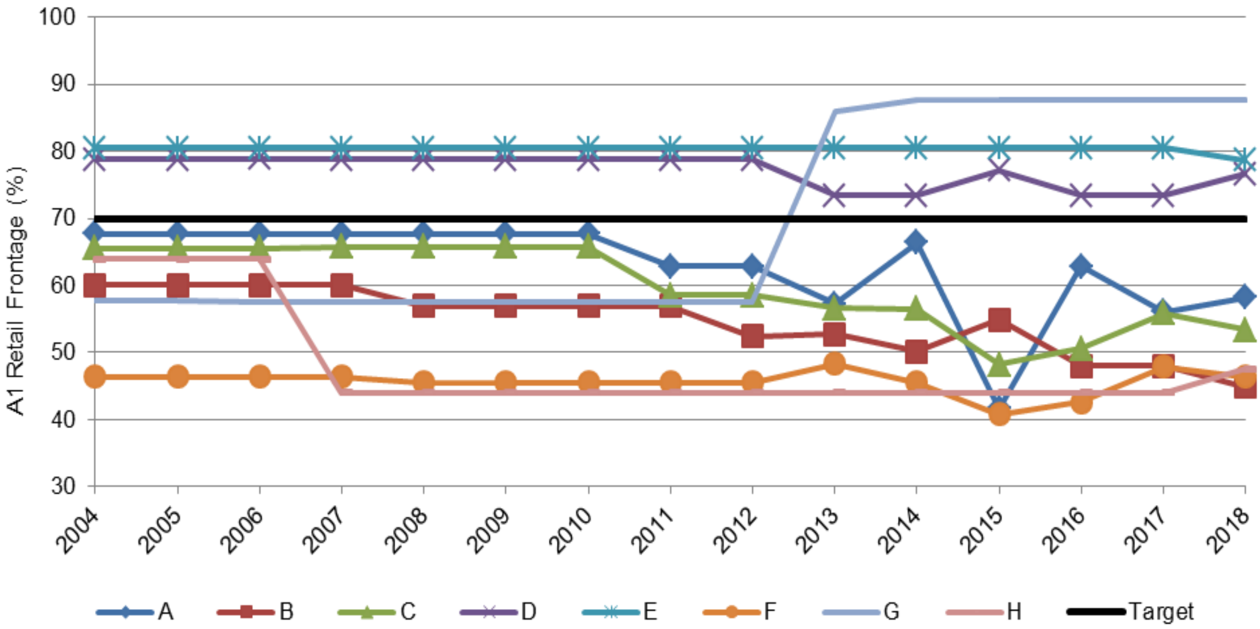
- 16/02193/PAP3O – 100 Victoria Road: Office to residential permitted development (-82sqm)
- 16/01739/PAP3O - 17 Massetts Road: Office to residential permitted development (-1,400sqm)
- 16/00096/PAP3M – 12-14 High Street: Office to residential permitted development (-89sqm)
- 18/00320/PAP3M – 83 Victoria Road: Retail to residential permitted development (-40sqm)

Frontages

Within Horley Town Centre there is considerable variation in the proportion of A1 retail in the frontages: frontage G has the greatest proportion of A1 retail (88%) whilst frontage B has the least (44%) due to a high proportion of cafes and service occupiers, including banks and estate agents, being located in this frontage.

As has been the case since 2013, frontages D, E and G continue to exceed the 70% A1 retail frontage target (77%, 79% and 88%) whilst frontages A, B, C, F and H continue to fall below this.

Figure 17 Horley Frontage A1 Retail Trend



Appendix

Survey Notes

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

Measurements of shop frontages are obtained using the following rules:

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

Definitions

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

Use Classes Order

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

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

*subject to prior approval by the local planning authority.

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

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

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

Monitoring Publications

Regular Monitors:

Commercial Development

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

Industrial Estates

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

Local Centres

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

Town centres

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

Population and Demographic Information

These publications are available on the Council website:

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

Search for: *"monitors":*

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

Planning Policy Team

Tel: 01737 276000

Email: LDF@reigate-banstead.gov.uk