Town Centre Monitor

September 2020

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

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1. Introduction

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

The purpose of monitoring town centres is to:

- Analyse use class and vacancy trends to assess the diversity, vitality and viability of provision
- Monitor relevant local policies contained within the borough's Local Plan
- 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.

This Town Centre Monitoring Report covers the period from September 2019 to September 2020 with survey work undertaken in September 2020.

During this monitoring period the town centres have both been impacted by – and have responded to – the impact of the Covid-19 pandemic. Non-essential retail was forced to close to members of the public for a significant period of time (March to June). When allowed to re-open the Council tried to encourage people back into the town centres through social media and through signage to encourage responsible behaviour and remind people of the importance of social distancing. Businesses have also had to adapt their operations to allow for Covid secure operation.

1.1. Policy Context

Following the adoption of the Development Management Plan (DMP) in September 2019, the Reigate & Banstead borough's Local Plan is comprised of the Core Strategy (adopted 2014 and reviewed 2019) and the Development Management Plan (DMP). The Core Strategy details how much growth will take place in the borough between 2012 and 2027 and sets out the overarching spatial strategy to deliver this growth. The DMP provides the detailed policies and site allocations to meet the planned level of growth.

Table 1 Relevant local plan policies and indicators

Policy/ Indicator	Monitoring Target
Core Strategy Strategic Objectives SO17 and SO18	Is the vitality and viability of town centres being maintained/ improved?
DMP Policy RET1	Seeks to ensure new development within town centre shopping frontages makes a positive contribution to the retail areas within which it is located whilst minimising the impact on other surrounding uses, and on users of the retail areas. Target: N/A
DMP Policy RET2	Seeks to ensure a healthy balance of uses is maintained in the borough's town centres

The Core Strategy recognises the different roles of the borough's four "town centres". Core Strategy Policy CS4 defines the following retail hierarchy for the town centres in the borough

- Redhill – The primary town centre and the focus for large-scale leisure, office, cultural and retail uses and development
- Reigate, Horley and Banstead – Secondary town centres, the focus of which is to maintain a balance of uses and development that promote both the vitality and viability of each individual centre.
- Local centres – Provide for more local needs and either offer now, or will be the focus for investment in, accessible local services. (The Council produces a separate Local Centre Monitor which is available on our website).

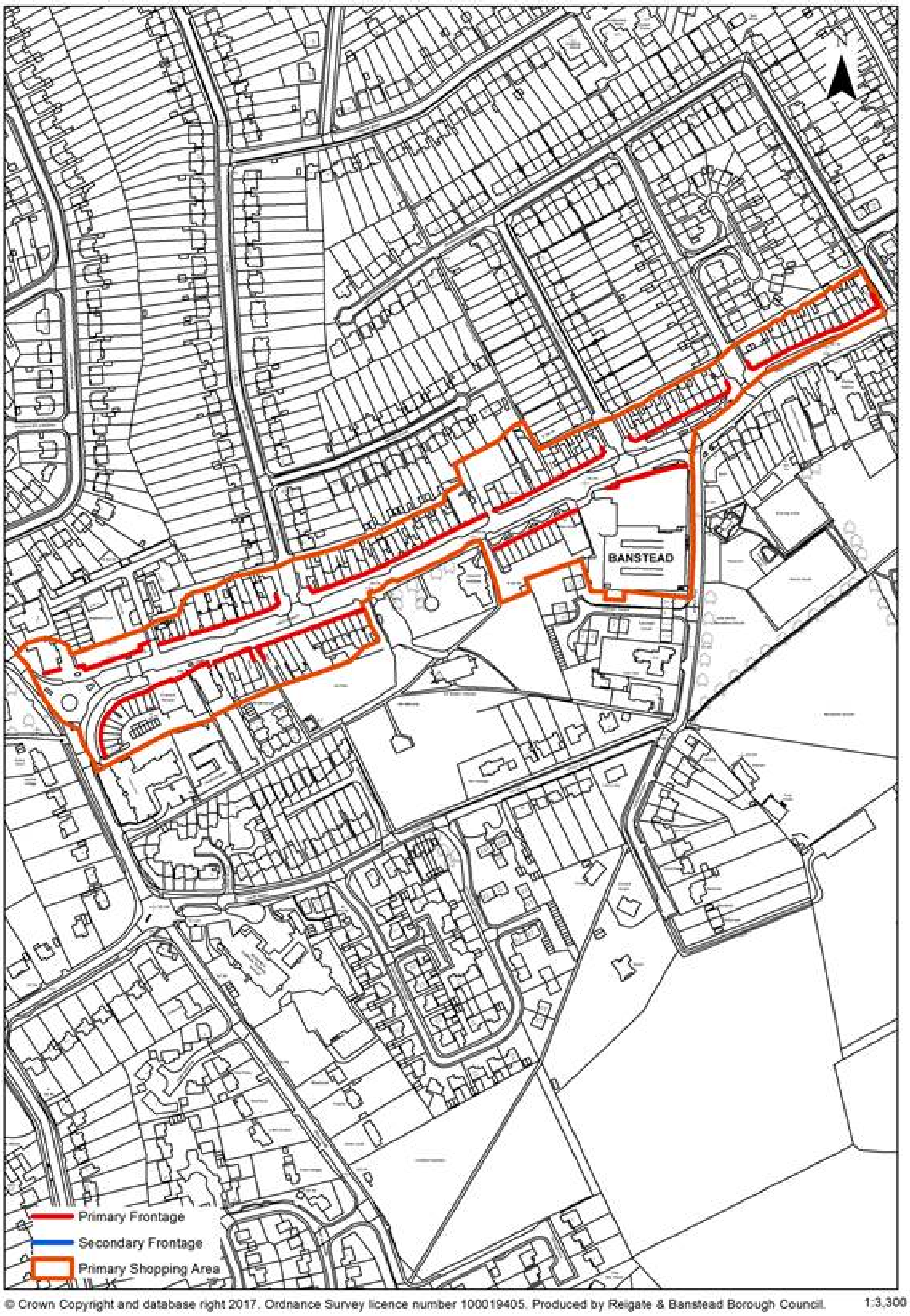
1.2. Use Classes

In order to protect and enhance the vitality and viability 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 DMP Policy RET2 ‘Town Centre Frontages’ is the promotion of retail uses and the resistance of excessive change away from core retail uses.

During this period there has been an amendment to the Use Class Order. The Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020 introduced from 1st September 2020 a number of fundamental changes to the Use Classes Order. Further information is provided in Appendix 1.

2. Town Centre Appraisals

2.1. Banstead Village



Commentary

Banstead Village is in the north of the borough and is the smallest town centre in the borough. It is an attractive early twentieth century centre primarily consisting of a unified parade of small retail units built in the 1920s and 1930s. The centre is popular with local residents, it includes a small area of green open space outside All Saints Church in the High Street and historically has had a strong selection of independent and specialist shops and low vacancies.

On adoption of the DMP no changes were made to the frontages. Trend analysis can therefore be made with previous monitors.

Vacancies & New Occupiers

Within this monitoring period there have been a number of occupier changes: 7 new occupiers have moved into the town centre and 4 occupiers have left the town centre.

There are currently 5 vacant units within the town centre, a slight decrease from 6 last year. Given this the percentage of vacant units, frontage and net retail floorspace has fallen:

- Percentage of vacant units: 5.1% to 4.3%
- Percentage of vacant frontage: 5.7% to 4.4%
- Percentage of vacant net floorspace: 3.5% to 2.4%.

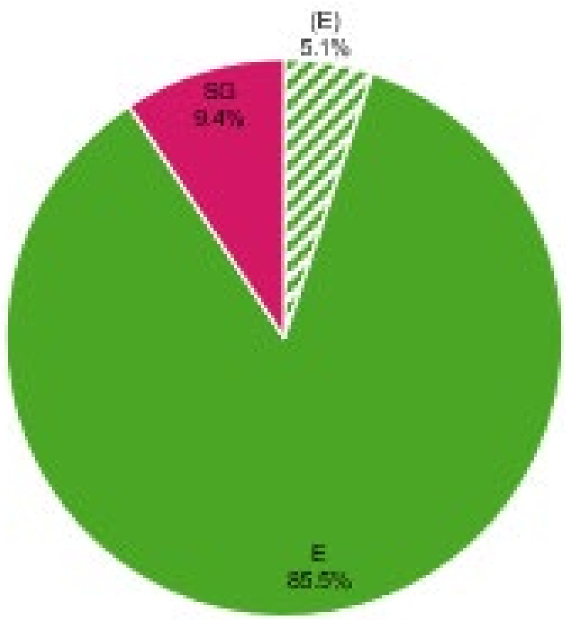
Table 2 Vacancy rates

Indicator	Vacancy Rate
Percentage of units	4.3%
Percentage of frontage	4.4%
Percentage of net retail floorspace	2.4%

Viability

The diagram below shows that E Use Class accounts for 90.6% of the units within the centre. The remaining 9.4% fall within SG uses.

Figure 1 Vitality



As can be seen in the table below, services occupy the greatest proportion of units within the centre and convenience retail occupies the greatest proportion of floorspace. Comparison retail occupies the second greatest proportion of units and floorspace.

Table 3 Retail offer

Offer	Units	Net Floorspace
Comparison	34 (29.1%)	2,849sqm (20.8%)
Convenience	15 (12.8%)	5,242sqm (38.2%)
Food and drink	20 (17.1%)	2,324sqm (16.9%)
Non-retail	1 (0.9%)	210sqm (1.5%)
Service	42 (35.9%)	2,761sqm (20.1%)
Vacant	5 (4.3%)	326sqm (2.4%)
Total	117 (100.0%)	13,712sqm (100.0%)

Development and Use Class Changes[1]

Within this monitoring period the following permissions were completed:

- 18/02681/CU: 113-115 High Street Banstead: Change of use from A1 to D1
- 19/01347/CU: 135 High Street, Banstead: Change of use A1 to A1/A3
- 19/02010/P: 109 High Street, Banstead: Change of use A1 to A3

The following permissions are under construction:

- 16/00882/F: 59 High Street: 56sqm single storey rear extension.
- 17/01887/P: Banstead Village Club: Change of use from B1(a) to C3
- 19/01807/CU: 59 High Street: Change of use from A1 to D1

The following planning permissions are extant:

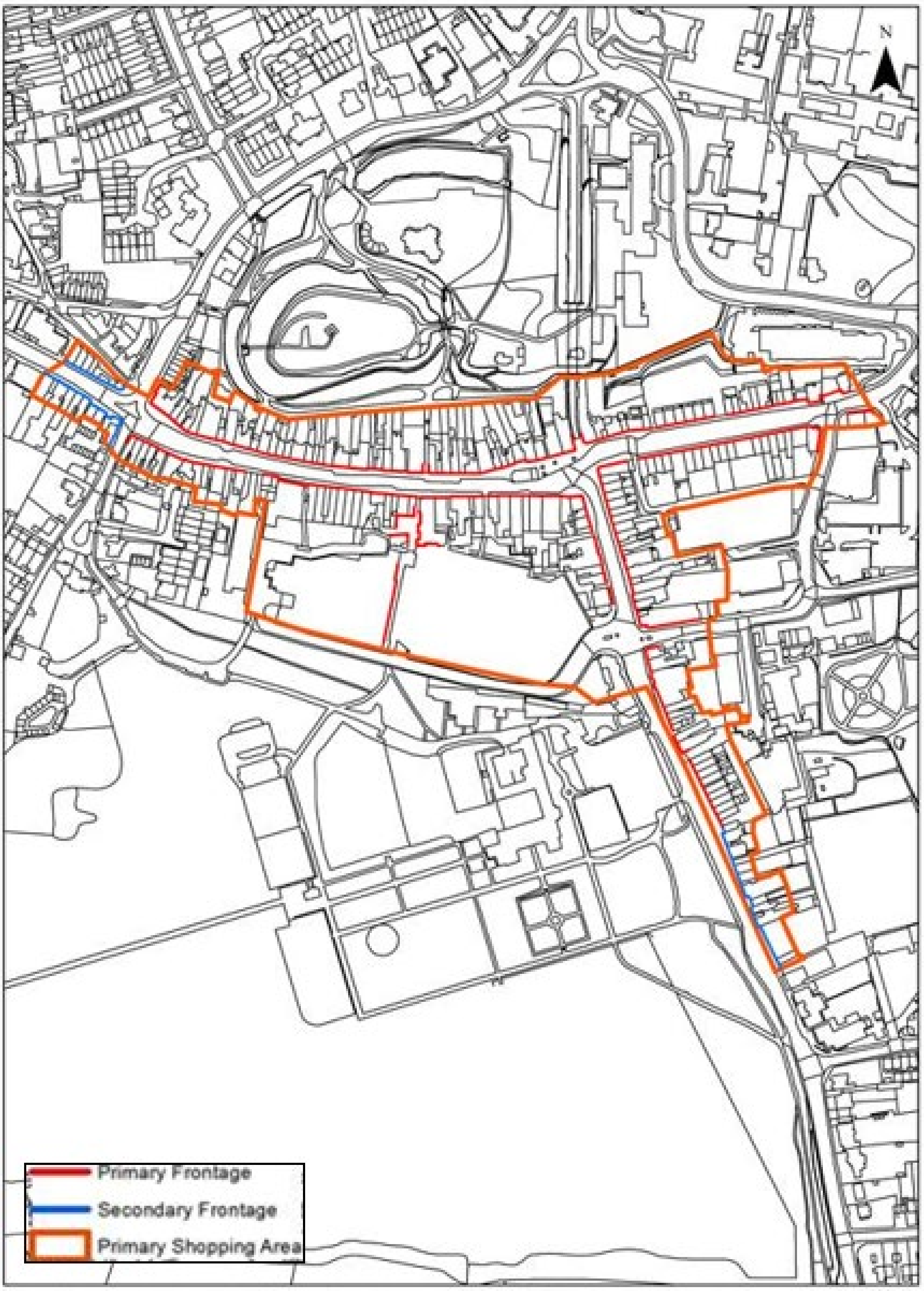
- 18/01984/F: 41 High Street: Single storey rear extension to increase A1 floorspace by 11sqm

[1] Please note that this refers to the use classes when the planning permission was granted.

- 18/00812/F: 32 High Street: Change of use from A2 to A1
- 20/0199/F: 123 High Street: Extension and change of use from A1 to D1.
- 20/00665/CU: 55 High Street: Change of use from A1 to D1.

Note: a number of these permissions are now superfluous as from 1st September 2020, the use classes are within the same new "E" use class, and so a change between the uses is not development.

2.2. Reigate Town Centre



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Commentary

Reigate is a historic market town centre with three main shopping streets oriented around the attractive focal point of the Old Town Hall. The general environmental quality of the town centre is high; there are benches and attractive planters dispersed throughout and the shop fronts are generally well maintained and of a high quality design standard.

Much of the town centre falls within a conservation area which has resulted in the retention of many small, narrow units and made the combination of units/ frontages difficult to achieve. Many units within the town centre are therefore not suitable for national chain stores which often have more standard minimum requirements for frontage widths and floor area. Reigate's retail offer is therefore characterised by a vibrant mix of small 'boutique' and independent stores.

Vacancies & New Occupiers

On adoption of the Council's DMP in September 2019, additional units which adjoined the former primary and secondary shopping frontages and were predominantly formerly designated as Areas of Small Business have been included within the town centre's frontages. A number of units which were formerly within the secondary frontage are now included within the primary frontage[2]. It is therefore not possible to compare directly with previous monitoring periods. Of the additional units, all apart from one unit which is undergoing redevelopment works for a new gallery, are occupied.

Within this monitoring period, 12 new retailers have moved into the town centre and 13 occupiers have left the town centre. There are currently 14 vacant units within the town centre. This accounts for 7.2% of the units, 6.2% of the frontage and 7.1% of the floorspace within the centre.

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[2] Information detailing changes provided in the DMP Regulation 18 Town Centre Review, Designation and Policy Evidence Paper and DMP Regulation 19 Town Centre Frontages Evidence Paper. Both available at: https://www.reigate-banstead.gov.uk/downloads/download/2014/town_centres

Table 4 Vacancy rates

Indicator	Vacancy Rate
Percentage of units	7.2%
Percentage of frontage	6.2%
Percentage of net retail floorspace	7.1%

Viability

The diagrams below show that E Use Class accounts for 90.4% of the units within the primary frontage and 82.3% of the units within the secondary frontage. A4 uses account for 4.0% of the units within the primary frontage and 11.1% of the secondary frontage. SG uses account for 5.6% of units within both the primary and secondary frontages. This mix is in line with DMP Policy RET2 which seeks to allow a greater variety of uses within the secondary frontage.

Figure 2 Vitality (Primary Frontage)

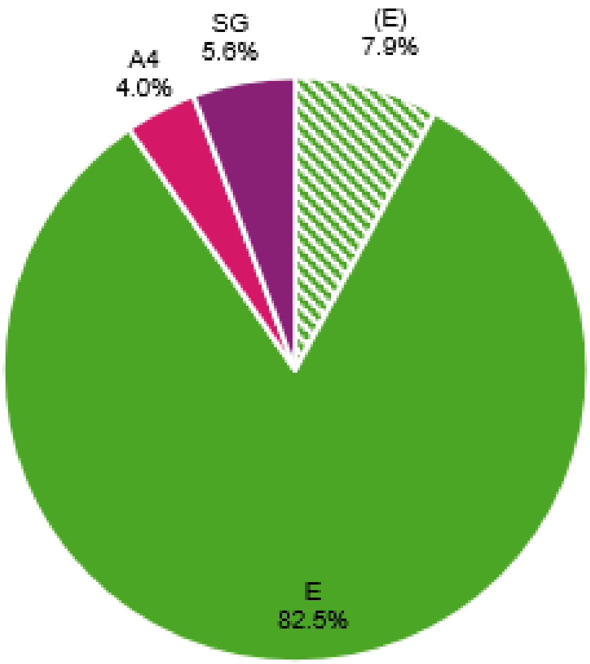
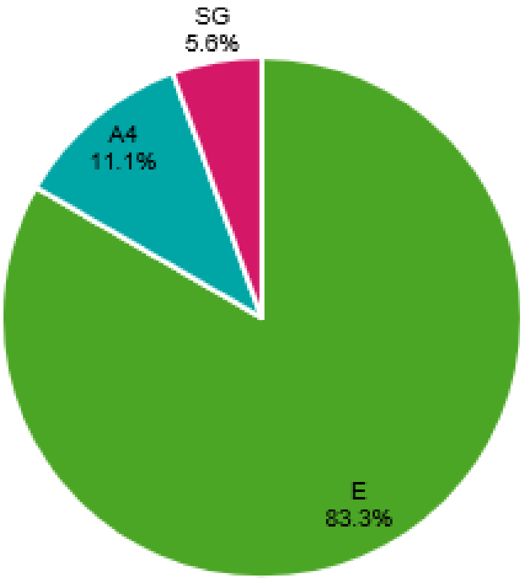


Figure 3 Vitality (Secondary Frontage)



As can be seen in the table below, the greatest proportion of units and floorspace within Reigate town centre is occupied by comparison retail (38.5% and 32.5% respectively). Convenience retail accounts for only 4.1% of the units but over a quarter of the floorspace, this is predominantly due to the large Morrisons supermarket within the town centre. Food and drink uses are represented well within the town centre (20.5% units; 25.5% floorspace).

Table 5 Retail offer

Offer	Units	Net Floorspace
Comparison	75 (38.5%)	6,722sqm (32.5%)
Convenience	8 (4.1%)	5,220sqm (25.2%)
Food and drink	40 (20.5%)	4,108sqm (19.8%)
Non-retail	3 (1.5%)	24 (0.1%)
Service	55 (28.2%)	3,164sqm (15.3%)
Vacant	14 (7.2%)	1,472sqm (7.1%)
Total	195 (100.0%)	20,709sqm (100.0%)

Development and Use Class Changes[3]

Within this monitoring period the following planning permission has been completed:

- 17/00847/P: 77-83 Bell Street: Change of use B1(a) to C3

The following permissions are under construction:

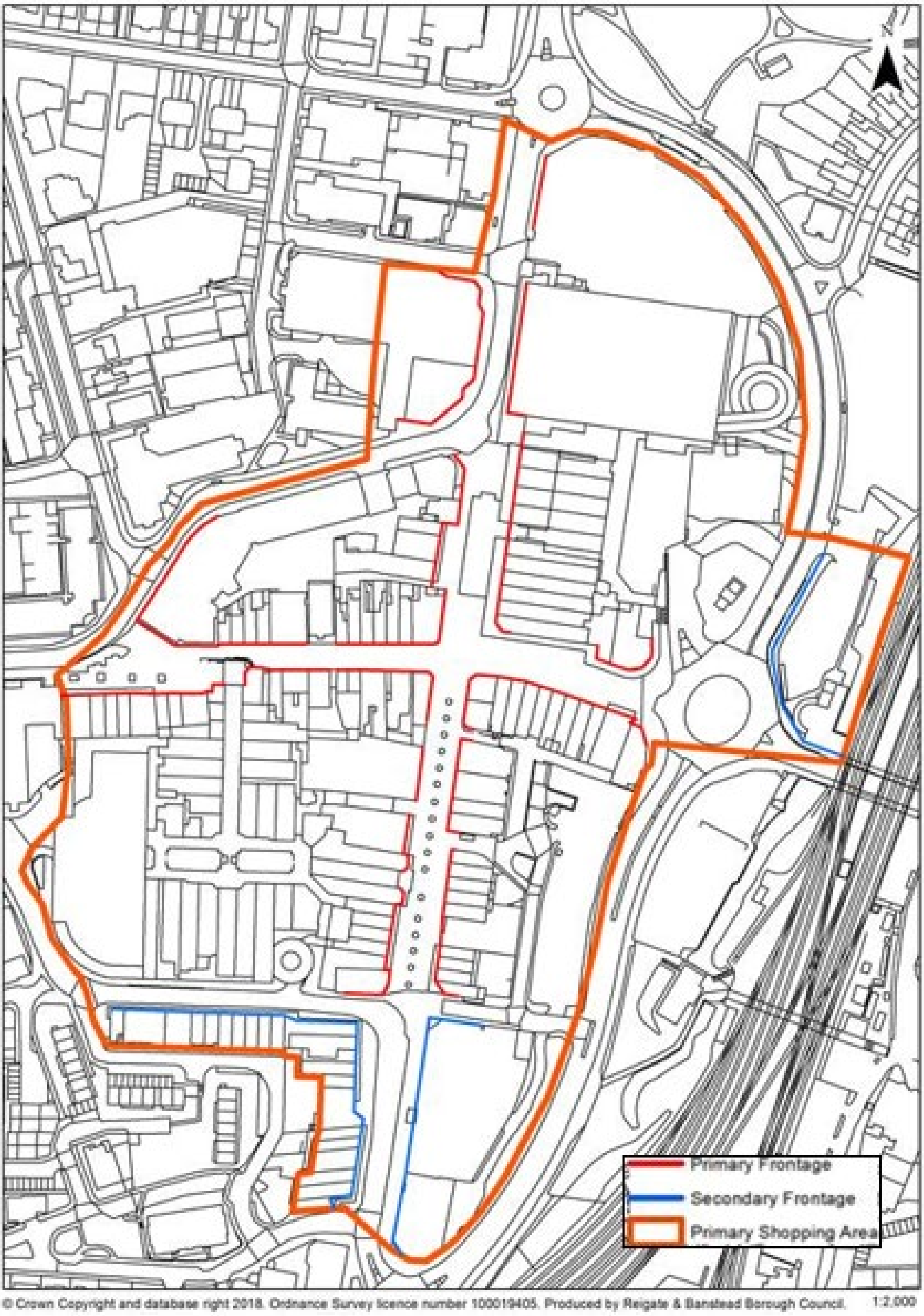
- 18/00829/P: 5a, 7a, 9a, 11a and 13a West Street (upper floors): Change of use B1(a) to C3
- 19/02164/CU: 46 Church Street: Change of use A1 to B1(a)

The following permissions are extant:

- 16/02370/F: 61a High Street: 121sqm A1 extension
- 19/01300/P: 99 Bell Street: Change of use B1(a) to C3
- 19/00715/F: Rear of 4-10 Church Street: Loss of 54sqm A2 and provision of C3 accommodation
- 20/00572/F: 1 Church Street (upper floors): Conversion of existing B1(a) and D2 uses to C3
- 20/00675/F: 45 Church Street: Change of use B1(a) to C3
- 20/00978/P: 7-11 High Street (upper floors): Change of use B1(a) to C3

[3] Please note that this refers to the use classes when the planning permission was granted.

2.3. Redhill Town Centre



Commentary

Core Strategy Policy CS7 ‘Town and Local Centres’ identifies Redhill as the primary town centre for the borough and the prime focus for large-scale leisure, office, cultural and retail uses and developments.

Despite excellent transportation links – it is not only a transport interchange and gateway for movement within the borough but also to inter-regional and international destinations – Redhill does not currently fulfil its potential in terms of retail offer and range of leisure facilities. This results in the borough’s residents choosing to – or having to – travel elsewhere for shopping and/or leisure. Given its strong locational advantages, Redhill is identified in the Core Strategy as the main centre for consolidation and growth.

A number of major regeneration projects have been completed over the past couple of years including for example public realm works and the redevelopment of Warwick Quadrant. A number of major regeneration projects are also currently under construction. These include the residential redevelopment of the Former Liquid & Envy site, mixed-use retail and residential redevelopment on Cromwell Road and mixed-use retail, leisure and residential accommodation at the Marketfield Way redevelopment. It is anticipated that these schemes will help to improve the retail, leisure and residential offer within the town centre and attract borough residents and potential employers into the town.

Redhill town centre 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 north / south, with a series of smaller shopping streets running off this. The town is home to the Belfry Shopping Centre, offering a large variety of predominantly comparison retail.

Vacancies & New Occupiers

On adoption of the Council’s DMP in September 2019, the retail units at the railway station have been included in the secondary frontage (see map on page 30). Of the additional units, all are occupied. The units under redevelopment in Cromwell Road and Marketfield Way have been excluded from this monitor as they have been demolished as part of the redevelopment works. It is therefore not possible to compare directly with previous monitoring periods.

Within this monitoring period, one new occupier has moved into the town centre (Hays Travel) who have occupied two units following their take-over of Thomas Cook. One existing occupier (Costa) has expanded into the neighbouring unit and two occupiers (Ping Pong and Citizen's Advice Bureau) has relocated within the town centre. 10 occupiers have left the town centre.

There are currently 15 vacant units within the town centre, this is the greatest proportion of vacant units of all of the town centres. 8.5% of the frontage within the town centre is vacant and 5.2% of the retail floorspace.

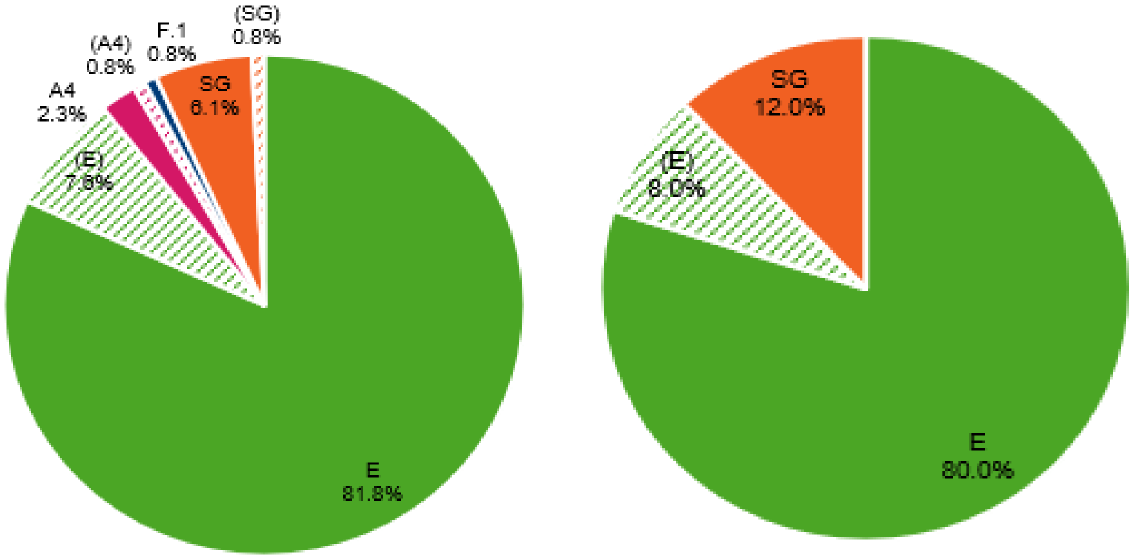
Table 6 Vacancy rates

Indicator	Vacancy Rate
Percentage of units	9.6%
Percentage of frontage	8.5%
Percentage of net retail floorspace	5.2%

Viability

The diagrams below show that the E Use Class accounts for 89.4% of the units within the primary frontage and 88.0% of the units within the secondary frontage. 6.8% of units within the primary frontage 12.0% of units within the secondary frontage are Sui Generis uses. Within the primary frontage 3.0% of units also fall within A4 uses and 0.8% within F.1 Use Class.

Figure 4 Vitality Primary Frontage (LH) and Secondary Frontage (RH)



The table below shows that the greatest proportion of units and floorspace within Redhill town centre are occupied by comparison retail. Convenience retail occupies the second greatest proportion of retail floorspace, however it occupies only 7.6% of the units. Services occupy the second greatest proportion of units.

Table 7 Retail offer

Offer	Units	Net Floorspace
Community	1 (0.6%)	587sqm (1.3%)
Comparison	59 (37.6%)	20,589sqm (44.8%)
Convenience	12 (7.6%)	15,303sqm (33.3%)
Food and drink	15 (9.6%)	2,206sqm (4.8%)
Non-retail	8 (5.1%)	715sqm (1.6%)
Service	47 (29.9%)	4,173sqm (9.1%)
Vacant	15 (9.6%)	2,373sqm (5.2%)
Total	157 (100%)	45,945sqm (100.0%)

Development and Use Class Changes[4]

The following permissions have been completed within this monitoring period:

- 18/00158/P: 47a Station Road (upper floors): Change of use from B1(a) to C3
- 20/00174/P: 38a Station Road: Change of use from A3 to A1

The following permissions are under construction:

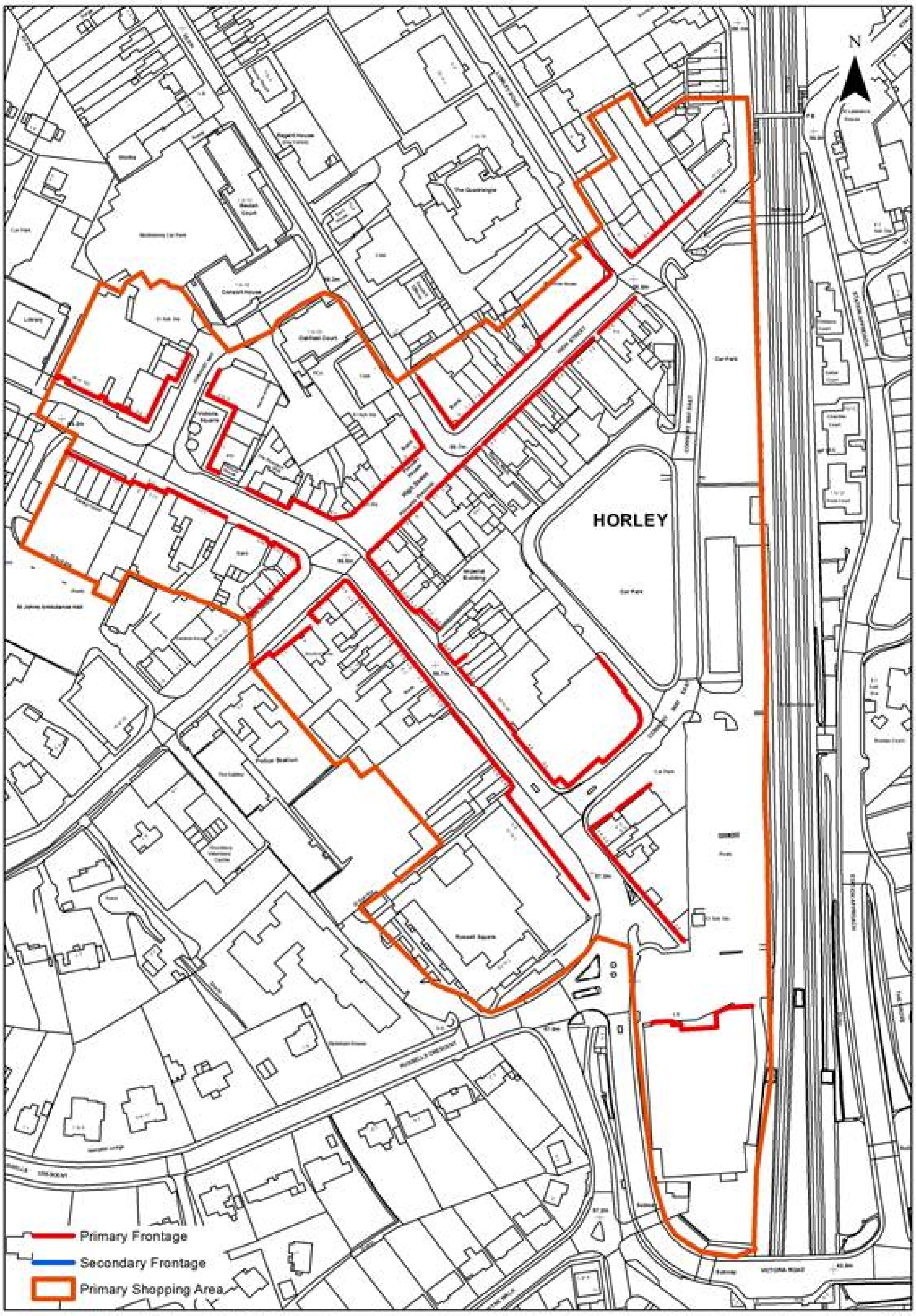
- 18/01158/F: 16-46 Cromwell Road: Redevelopment to form new residential and retail accommodation

The following permissions are extant:

- 17/03013/F: 36-38 Station Road (upper floors): Change of use from A1 and A2 to C3
- 18/00813/F: 33 High Street: Change of use A4 to A3
- 18/02668/F: 46 Station Road: Demolition of rear elements and extension/ reconfiguration/ conversion to provide C3 accommodation

[4] Please note that this refers to the use classes when the planning permission was granted.

2.4. Horley Town Centre



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Commentary

Situated within the south of the borough, Horley town centre is comprised of several shopping streets oriented around the junction of Victoria Road and High Street. The main High Street is pedestrianised and to the south there is a large Waitrose supermarket and independent department store (Collingwood Batchelor's). Horley Railway Station lies to the south of the town centre.

Within recent years the town centre has undergone some redevelopment; as a result, the centre has a mix of modern and historic buildings, providing a selection of smaller and larger units for retail occupiers. The pedestrianised High Street has recently been refurbished and now includes a pleasant area of public realm with outdoor seating and planters. A number of other public realm improvements have been made within recent years, including the creation of an informal square outside the Jack Fairman Public House.

Horley town centre was impacted significantly during the 2010 economic recession and in 2012 was awarded £100,000 government funding from the High Street Innovation Fund to help reverse this trend and boost vitality. The Core Strategy spatial strategy includes restoration of the vitality and vibrancy of Horley through regeneration in the town centre and completion of two new neighbourhoods (Horley North East and Horley North West Sectors).

Vacancies & New Occupiers

On adoption of the Council's DMP in September 2019, both the new and existing retail units on Victoria Road have been included within the primary frontage. It is therefore not possible to compare directly with previous monitoring periods.

Within this monitoring period, one of the occupiers (Serendipity Coffee) expanded into an additional unit and a further occupier (Carlton Clinic) has relocated to one of the newly constructed units at 71 Victoria Road. Two occupiers have left the town centre over the course of the monitoring period (Oxfam and Pie and Mash Café).

There are currently 9 vacant units within the town centre. Whilst Redhill town centre has the greatest number of vacant units, Horley town centre has the greatest proportion of vacant frontage of all the town centres in the borough (10.3%), comparable to the national vacancy rate.

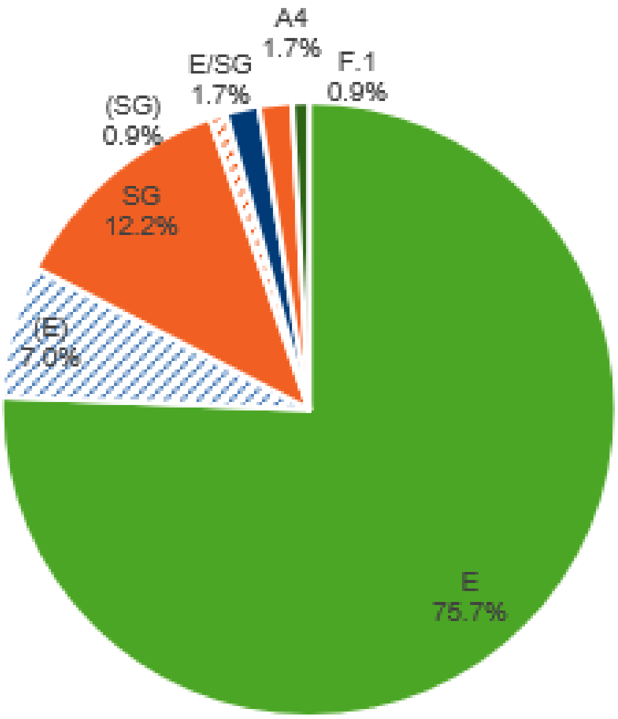
Table 8 Vacancy rates

Indicator	Vacancy Rate
Percentage of units	7.8%
Percentage of frontage	10.3%
Percentage of net retail floorspace	5.0%

Viability

The diagram below shows that 82.6% of units are within E Use Class and13.0% of units sui generis uses. The remainder of the units are mixed Use Class E and sui generis use, A4 and F.1 uses.

Figure 5: Vitality



The table below shows that the greatest proportion of units are occupied by services (32.2%) and the greatest proportion of floorspace is occupied by comparison retail (29.9%).

Table 9 Retail offer

Offer	Units	Net Floorspace
Comparison	25 (21.7%)	5,760sqm (29.9%)
Convenience	10 (8.7%)	5,375sqm (27.9%)
Food and drink	26 (22.6%)	3,362sqm (17.5%)
Non-retail	8 (7.0%)	947sqm (4.9%)
Service	37 (32.2%)	2,844sqm (14.8%)
Vacant	9 (7.8%)	964sqm (5.0%)
Total	115 (100.0%)	19,253sqm (100.0%)

Development and Use Class Changes[5]

The following permissions have been completed within this monitoring period:

- 19/01100/CU: 71 Victoria Road: Change of use from A1/A2 to A1/A2/A3/B1/D1
- 19/01624/CU: 40 High Street: Change of use A1 to A5
- 19/02180/CU: 117 Victoria Road: Change of use A1 to D2

The following permissions are under construction:

- 14/00317/F: Saxley Court, 121-129 Victoria Road: Partial demolition of existing building, conversion of existing floors to residential and additional residential floor of accommodation. (Note: A number of the residential units have been completed and are occupied).

[5] Please note that this refers to the use classes when the planning permission was granted.

- 18/00320/P: Ground Floor 83 Victoria Road: Change of use from A1 to C3

The following permissions are extant:

- 19/00158/P: 84a Victoria Road: Change of use A1 to C3
- 19/00597/F: 7 High Street: 19sqm retail extension. (Note: this unit is now vacant)
- 19/01733/P: 34a High Street: Change of use upper floors to C3.
- 19/02166/F: 34 High Street: Demolition of rear of existing building and erection of C3 extension
- 20/00867/P: R/O 11-15 High Street, Horley: Change of use A2 to C3

3. Overview and Summary

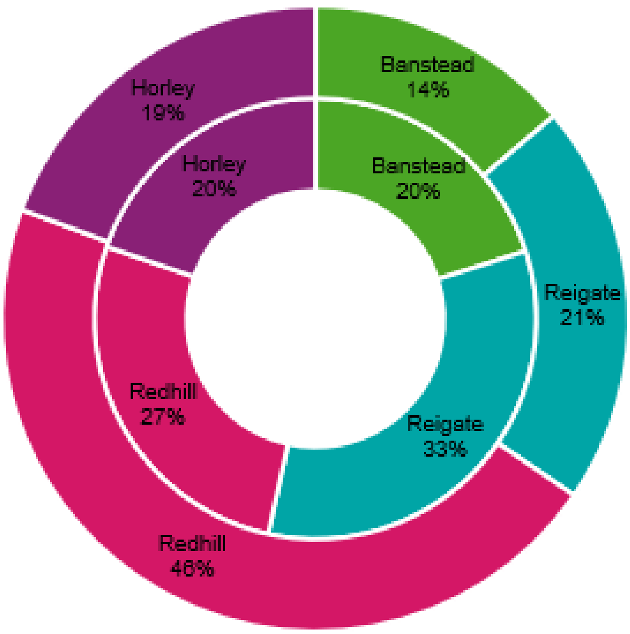
This chapter brings together the individual analysis of the town centres.

3.1. Town Centre Composition

Cumulatively the borough's town centres provide 584 units, 99,619sqm retail floorspace and 5,500sqm of retail frontage.

The diagram below shows that almost half of the floorspace of all of the borough's town centre units is located within Redhill (46%), however Reigate has the highest proportion of the town centre units (33%) followed by Redhill (27%). This is due to the characteristics of Redhill and Reigate town centres – the whole of Reigate town centre is designated as a conservation area and is comprised of smaller more boutique units whilst only part of Redhill town centre is designated as a conservation area which allows the formation of larger format stores outside of the conservation area. It also has the Belfry Shopping Centre which provides larger format stores, including department stores such as Marks & Spencer's.

Figure 6 – Distribution of town centre retail units and floorspace (units inner, floorspace outer)



3.2. Vacancy Trend

With the adoption of the DMP in September 2019, there have been a number of changes to the designated retail frontages. The designated frontages within Horley, Redhill and Reigate have been expanded to include additional units which either have been newly constructed since the 2005 Borough Local Plan or units which formerly formed part of other designations in earlier development plans.

A number of other amendments have also been made to Redhill's monitoring schedule, for example, removing units which have been demolished and are currently being redeveloped as part of regeneration works at Cromwell Road and Marketfield Way. This has been done to better reflect the vacancy trends and uses within the town centres.

It is therefore not possible to draw direct comparisons with previous years' monitoring records, other than through percentages as provided in Figure 8.

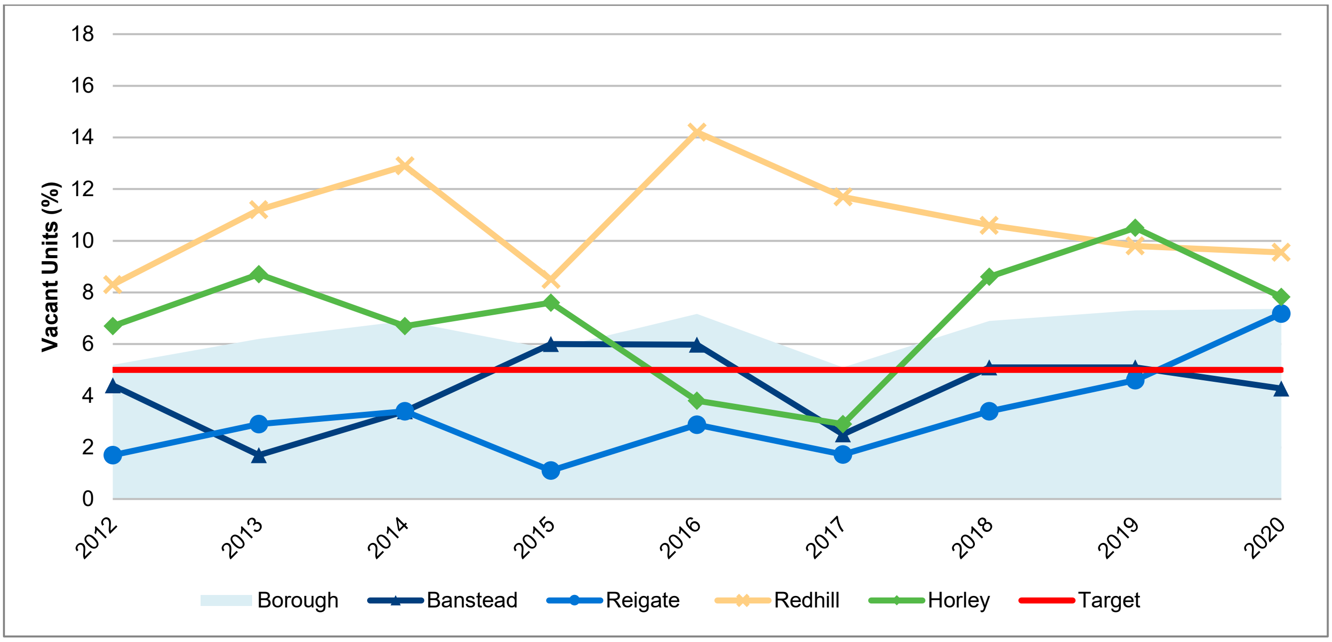
The table below shows that overall there are 43 vacant units. The greatest number of vacant units are within Redhill, followed by Reigate, Horley and Banstead.

Table 10 Number of vacant units

Type	Number of Vacant Units
Banstead	5
Reigate	14
Redhill	15
Horley	9

The diagram below shows that Banstead is the only town centre to have a vacancy rate below the Core Strategy Monitoring Framework target of 5.0% (4.3%). Redhill has the highest vacancy rate (9.6%), followed by Redhill (7.8%) and Reigate (7.2%). This compares favourably to the national vacancy rate for town centres in March 2020 of 10.3%.

Figure 7: Vacancy Rate[6]



The length of vacant frontage and the distribution of vacant frontage are also important considerations as both vacant units with large frontages and a concentration of vacant frontages will have a disproportionate vitality and visual impact.

The table below shows that overall, 7.5% of the town centres frontage is vacant. Horley has the greatest proportion of vacant frontage (10.3%) whilst Banstead has the least (4.4%). Within all of the town centres the vacant units are scattered throughout the centres.

[6] Please note the inclusion of additional units within the town centre frontages from 2020.

Table 11Vacant frontage

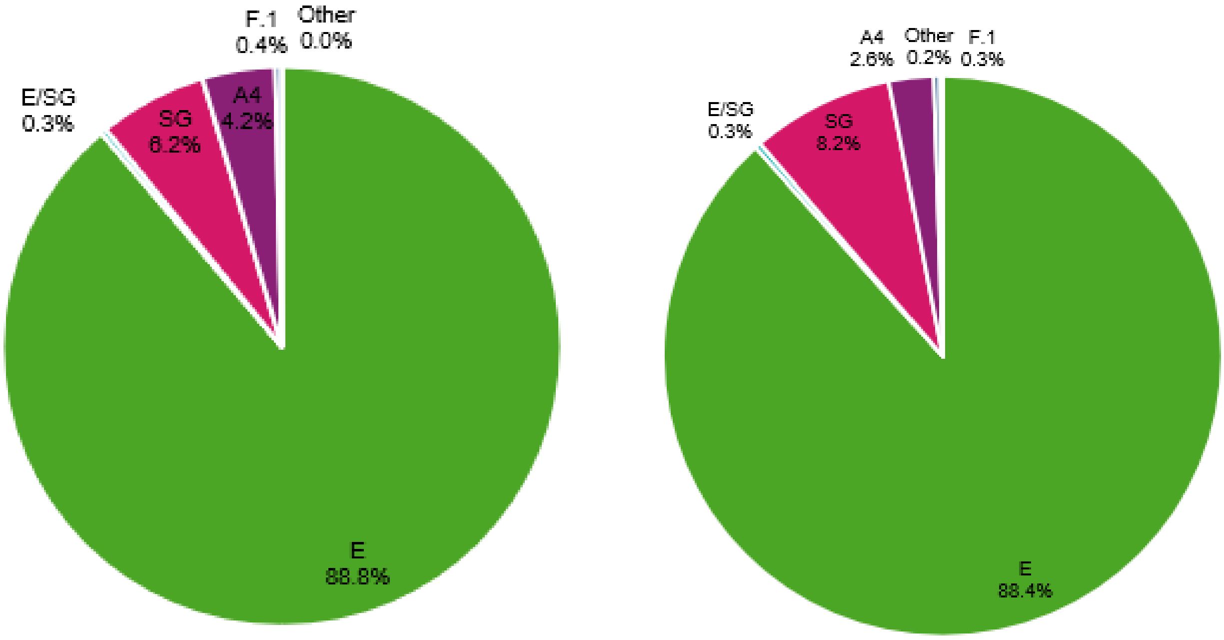
Type	Vacancy Rate
Banstead	4.4%
Reigate	6.2%
Redhill	8.5%
Horley	10.3%

3.3. Use Classes

In order to protect and enhance the vitality and viability 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 DMP Policy RET2 ‘Town Centre Frontages’ is the promotion of retail uses and the resistance of excessive change away from core retail uses.

The diagrams below shows that 89% of both the units and frontage length within the town centres fall within E Use Class.

Figure 8: Use Class composition - frontage length (LH) and units (RH)



3.4. Retail Offer

The 'offer' within the town centre provides an indication of the types of shops and services in the town centre. The table below shows that "comparison" retail occupies the greatest number of units and the greatest amount of floorspace in the borough's town centres (33.0% units and 36.1% floorspace). "Convenience" retail occupies the second greatest amount of floorspace within the town centres (31.3%) although only 7.7% of the units due to a number of large supermarkets within the borough's town centres, such as Waitrose in Horley. "Services" occupy the third greatest number of units (31.0%). Community uses occupy the least number of units and floorspace (0.2% and 0.6% respectively).

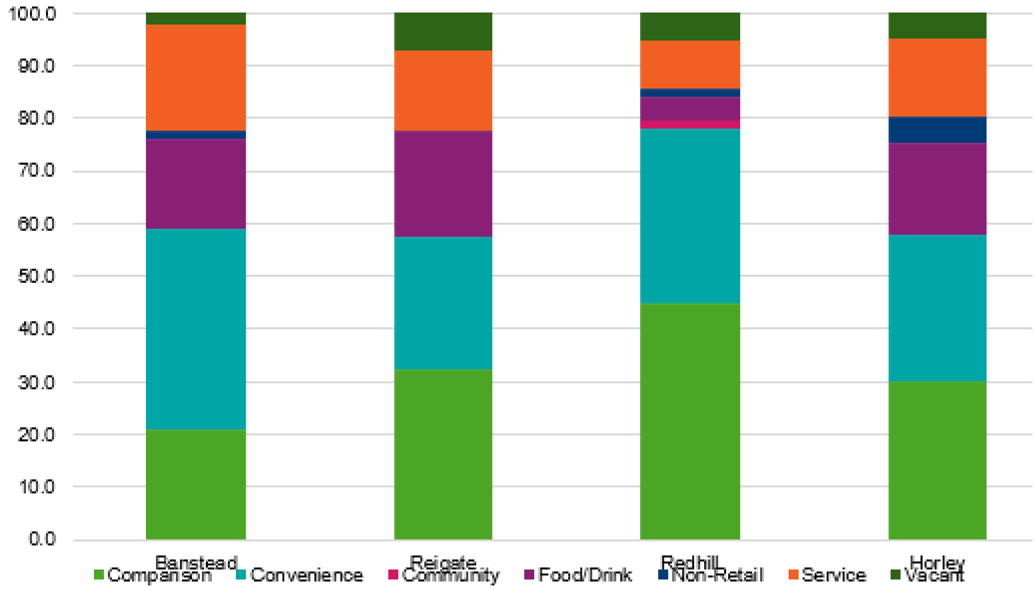
Please refer to Table 13 for which uses are in which category.

Table 12 Breakdown of retail offer

Type of Retail Offer	Units	Floorspace
Comparison	193 (33.0%)	35,919sqm (36.1%)
Convenience	45 (7.7%)	31,141sqm (31.3%)
Community	1 (0.2%)	587sqm (0.6%)
Food and drink	101 (17.3%)	12,000sqm (12.0%)
Non-retail	20 (3.4%)	1,895sqm (1.9%)
Service	181 (31.0%)	12,942sqm (13.0%)
Vacant	43 (7.4%)	5,135sqm (5.2%)
Total	584	99,619sqm

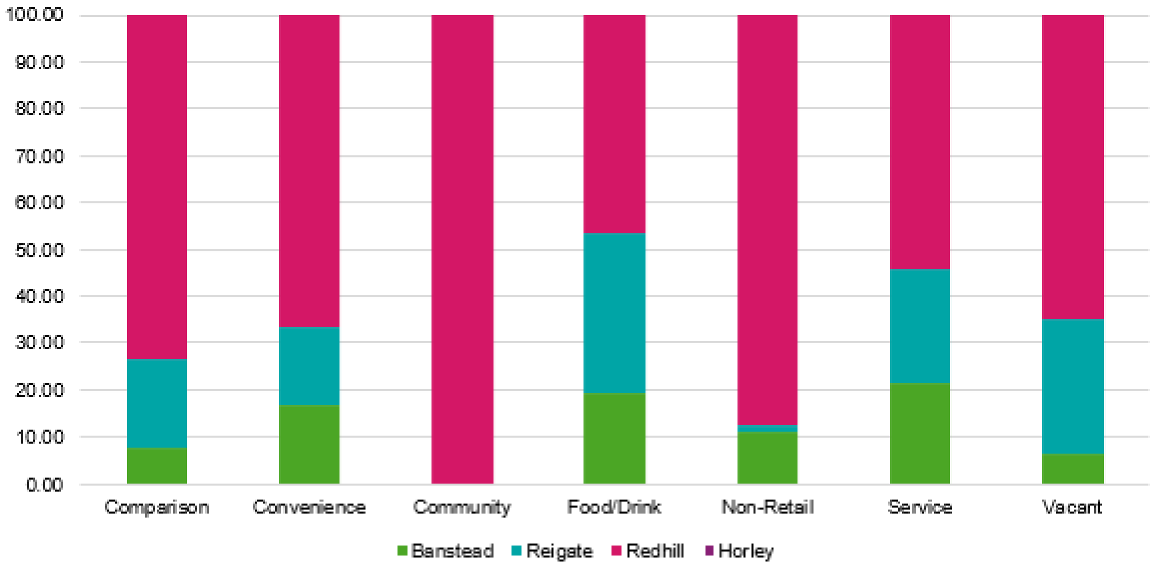
The diagram below details the composition of retail floorspace across the town centres. It shows that comparison and convenience retail, services, and food and drink are the main occupiers of all of the town centres, whilst non-retail, community and vacant premises occupy smaller percentages.

Figure 9: Offer by town centre



The diagram below shows the retail offer within the town centres. It shows that Redhill town centre has the greatest proportion of comparison, convenience, community and service accommodation. Horley town centre has the greatest proportion of food and drink offer.

Figure 10: Offer by retail category



3.5. Categorised Town Centre Offer

The following tables categorise the offer within the town centres. They show that the greatest proportion of comparison retail, services and food and drink uses are within Reigate town centre and the greatest proportion of convenience retail is located within Banstead. Of the units within Banstead, the greatest proportion are occupied by services, followed by comparison retail. Conversely, convenience retail occupies the fewest units. This is also true for Reigate and Redhill town centres. Within Horley town centre the greatest proportion of units are occupied by services.

Table 13 Detailed breakdown comparison retail (units)

Type of Retail Offer	Banstead	Reigate	Redhill	Horley	Total
Bookshops and stationers	1 (0.9%)	5 (2.6%)	5 (3.2%)	0 (0.0%)	11 (1.9%)
Charity/ second hand	8 (6.8%)	6 (3.1%)	6 (3.8%)	8 (7.0%)	28 (4.8%)
Clothing, footwear and accessories	11 (9.4%)	29 (14.9%)	18 (11.5%)	8 (7.0%)	66 (11.3%)
Electronics and technology	0 (0.0%)	3 (1.5%)	7 (4.5%)	0 (0.0%)	10 (1.7%)
Home and DIY	9 (7.7%)	10 (5.1%)	2 (1.3%)	4 (3.5%)	25 (4.3%)
Other comparison retail (e.g. gifts, florists etc.)	5 (4.3%)	22 (11.33%)	21 (13.4%)	5 (4.3%)	53 (9.1%)
Total Comparison	34 (29.1%)	75 (38.5%)	59 (37.6%)	25 (21.7%)	193 (33.0%)

Table 13 Detailed breakdown convenience retail (units)

Type of Retail Offer	Banstead	Reigate	Redhill	Horley	Total
Chemist/ pharmacy	4 (3.4%)	2 (1.0%)	3 (1.9%)	3 (2.6%)	12 (2.1%)
Food/ supermarket	10 (8.5%)	5 (2.6%)	7 (4.5%)	5 (4.3%)	27 (4.6%)
Newsagents	1 (0.9%)	1 (0.5%)	2 (1.3%)	2 (1.7%)	6 (1.0%)
Total Convenience	15 (12.8%)	8 (4.1%)	12 (7.6%)	10 (8.7%)	45 (7.7%)

Table 13 Detailed breakdown food and drink establishments (units)

Type of Retail Offer	Banstead	Reigate	Redhill	Horley	Total
Café/ sandwich bar	6 (5.1%)	11 (5.6%)	8 (5.1%)	10 (8.7%)	35 (6.0%)
Pub/ Bars	0 (0.0%)	9 (4.6%)	3 (1.9%)	3 (2.6%)	15 (2.6%)
Restaurant	9 (7.7%)	16 (8.2%)	3 (1.9%)	6 (5.2%)	34 (5.8%)
Take-away	5 (4.3%)	4 (2.1%)	1 (0.6%)	7 (6.1%)	17 (2.9%)
Total Food and Drink Establishment	20 (17.1%)	40 (20.5%)	15 (9.6%)	26 (22.6%)	101 (17.3%)

Table 13 Detailed breakdown services (units)

Type of Retail Offer	Banstead	Reigate	Redhill	Horley	Total
Banking	3 (2.6%)	4 (2.1%)	10 (6.4%)	2 (1.7%)	19 (3.3%)
Bookmakers	2 (1.7%)	1 (0.5%)	2 (1.3%)	2 (1.7%)	7 (1.2%)
Dry cleaning	2 (1.7%)	3 (1.5%)	2 (1.3%)	3 (2.6%)	10 (1.7%)
Estate agents	7 (6.0%)	12 (6.2%)	10 (6.4%)	10 (8.7%)	39 (6.7%)
Hair and beauty	14 (12.0%)	21 (10.8%)	10 (6.4%)	10 (8.7%)	55 (9.4%)
Opticians	5 (4.3%)	4 (2.1%)	5 (3.2%)	2 (1.7%)	16 (2.7%)
Other services (e.g. employment, repairs etc.)	8 (6.8%)	8 (4.1%)	6 (3.8%)	8 (7.0%)	30 (5.1%)
Travel agents	1 (0.9%)	2 (1.0%)	2 (1.3%)	0 (0.0%)	5 (0.9%)
Total Convenience	42 (35.9%)	55 (28.2%)	47 (29.9%)	37 (32.2%)	181 (31.0%)

Table 13 Detailed breakdown other (units)

Type of Retail Offer	Banstead	Reigate	Redhill	Horley	Total
Non-Retail	1 (0.9%)	3 (1.5%)	8 (5.1%)	8 (7.0%)	20 (3.4%)
Community	0 (0.0%)	0 (0.0%)	1 (0.6%)	0 (0.0%)	1 (0.2%)
Vacant	5 (4.3%)	14 (7.2%)	15 (9.6%)	9 (7.8%)	43 (7.4%)
Total Other	6 (5.1%)	17 (8.7%)	24 (15.3%)	17 (14.8%)	64 (11.0%

3.6. Future Trends

Over the course of 2020 the retail industry has changed significantly due to the impact of the Covid-19 pandemic.

At the beginning of the year, PricewaterhouseCoopers predicted that 2020 would continue to be challenging due to uncertainty regarding Brexit but that the outlook would improve over the course of the year as consumers became less cautious and more confident.

The Retail Gazette considered that growth would take place due to:

- Increased widespread emphasis on environmentally friendly and decomposable products;
- Technological innovation to target the right customer at the right time and place;

- Experimental retail: greater emphasis on creating customer experiences in store in order to attract customers; and
- Diversification of customer loyalty products in order to cater for a wider range of spending habits to help create greater loyalty in the process.

The Covid-19 pandemic brought unprecedented uncertainty, complexity and change to the retail industry. Physical non-essential retail stores were forced to close and there was a proliferation in online retailing. KPMG's research suggests that the global pandemic has accelerated four key fundamental trends that were already influencing the sector: business model evolution, the value of purpose, the ruthless focus on reducing cost and the increased power of the consumer.

Deloitte suggest that as we start to look to 2021, retailers should consider the following:

- Digital: Retailers need to adapt to find new ways to reach and serve their customers
- Sustainable supply chain: Retailers must act on the lessons learned during the crisis to create a more diversified and collaborative supply chain.
- Resilience: Retailers should nurture a culture of speedy decision-making and a focus on test and learn.
- Safety and wellbeing: Retailers need to ensure that safety measures are put in place to protect customers, employees and suppliers.
- Future of work: There is an opportunity for retailers to re-engage, retrain and redeploy their workforce to support new organisational priorities.

The analysis suggests that so far, the viability of the borough's town centres have not significantly been impacted by Covid, however this may be due to the safety and social distancing measures not yet having had time to fundamentally impact upon businesses within the town centres and therefore the viability of the town centres. Circumstantial evidence suggests that this may be due to people not commuting and therefore spending greater amounts of time and money nearer their homes and also due to businesses' diversification into 'click-and-collect', online sales and take-aways. Nationally however, a number of large chain-stores have reported deficits, closures and redundancies and the food and drink industry is reporting that social distancing measures are having a significantly negative impact upon their businesses. The Council will continue to monitor the impact of Covid on the town centres.

Appendix 1

Use Class before 1st September 2020	Uses	Use Class from 1 September 2020
A1 (part)	Shops, retail warehouses, post offices, ticket and travel agencies, sale of cold food for consumption off premises, hairdressers, funeral directors, hire shops, dry cleaners and internet cafés.	E
A1 (part)	Shops not more than 280sqm mostly selling essential goods, including food and at least 1km from another similar shop.	F.2
A2	Banks, building societies, estate and employment agencies, professional services (not health or medical services)	E
A3	Restaurants and cafés.	E
B1(a), B1(b) and B1(c)	Offices other than a use within former A2 Use Class, research and development of products or processes and business premises for any industrial process (which can be carried out in any residential area without causing detriment to the amenity of the area).	E
D1 (part)	Clinics, health centres, creches, day nurseries, day centre.	E

D1 (part)	Schools, non-residential education and training centres, museums, public libraries, public halls, exhibition halls, places of worship, law court.	F.1
D2 (part)	Gymnasiums, indoor recreations not involving motorised vehicles or firearms.	E
D2 (part)	Indoor or outdoor swimming baths, skating rinks, and outdoor sports or recreations not involving motorised vehicles or firearms.	F.2
D2 (part)	Cinemas, concert halls, bingo halls and dance halls	Use which no longer falls within a specified use class (Sui Generis (SG) uses)
A4	Pub or drinking establishment	Use which no longer falls within a specified use class (Sui Generis (SG) uses)

A5	Hot food takeaway	Use which no longer falls within a specified use class (Sui Generis (SG) uses)