Town Centre Monitor

May 2021

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

Contents Page

Please Note:

The information contained within this monitor details data from town centres in Reigate & Banstead during the period September 2020 to May 2021.

Whilst every care has been taken to ensure that the information in this monitor is accurate, the 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 gratefully received. Please send suggestions by email to: LDF@reigate-banstead.gov.uk.

Data is continuously reviewed as an on-going process and new information can be discovered that impacts data within previous Town Centre Monitoring Reports. To keep our statistics up-to-date and accurate, information reported in previous versions of this monitor will be updated accordingly in the latest Town Centre Monitor.

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 2020 to May 2021 with survey work undertaken in May 2021.

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 (October to December 2020 and January to April 2021). 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 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

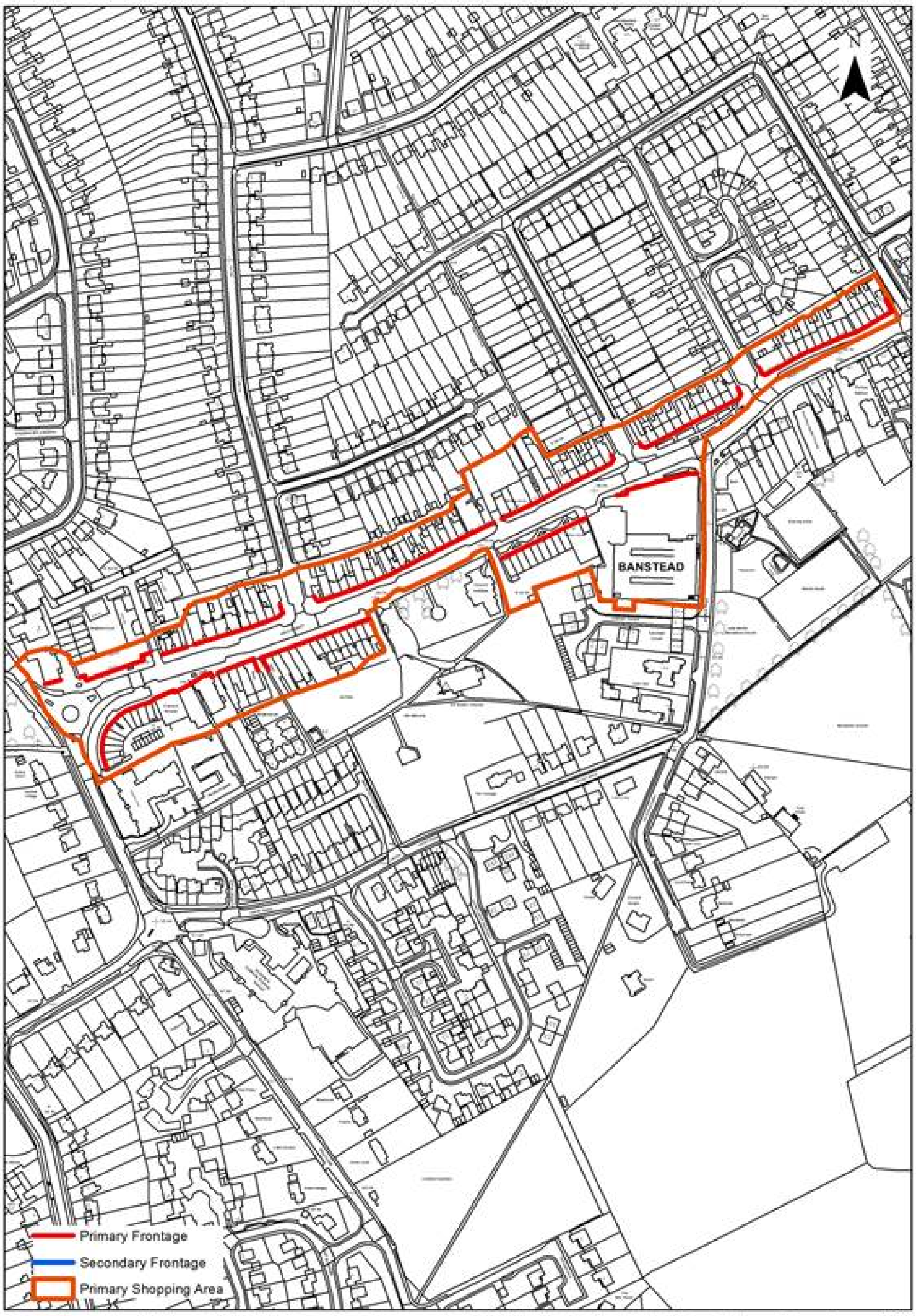
Frontages' is the promotion of retail uses and the resistance of excessive change away from core retail uses.

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.

Please note that under the 'Development and Use Classes' sections under each town centre appraisal, this refers to the use classes when planning permission was granted.

2. Town Centre Appraisals

2.1. Banstead Village



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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.

Vacancies & New Occupiers

Within this monitoring period, four new occupiers have moved into the town centre, whilst four occupiers have left the town centre.

Banstead has the least number of vacant units of all four town centres. There are currently 5 vacant units within the town centre, the same number as the previous monitoring period. Given this, the percentage of vacant units, frontage and net retail floorspace has stayed almost identical. Of all town centres in the borough, Banstead has the lowest vacancy rate for all three of these vacancy indicators.

- Percentage of vacant units: 4.3% to 4.3%
- Percentage of vacant frontage: 3.2% to 3.1%
- Percentage of vacant net retail floorspace: 2.4% to 2.4%

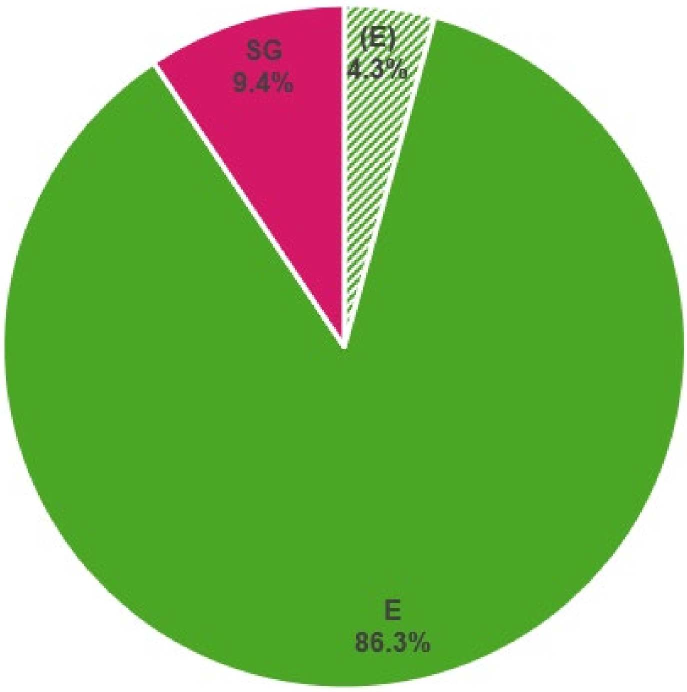
Table 2 Vacancy rates in Banstead during the monitoring period

Indicator	Vacancy Rate
Percentage of units	4.3%
Percentage of frontage	3.1%
Percentage of net retail floorspace	2.4%

Viability

Figure 1 below shows that E Use Class accounts for 90.6% of the units within the centre. This includes units within the E Use Class that are currently vacant (E). The remaining 9.4% fall within SG uses.

Figure 1 Vitality in Banstead during the monitoring period



As can be seen in Table 3 below, services occupy the greatest proportion of units within the town centre and convenience retail occupies the greatest proportion of floorspace. Comparison retail occupies the second greatest proportion of both units and floorspace.

Table 3 Retail offer in Banstead during the monitoring period

Offer	Units	Net Floorspace
Comparison	33 (28.2%)	2,719sqm (19.8%)
Convenience	15 (12.8%)	5,242sqm (38.2%)
Food and drink	22 (18.8%)	2,512sqm (18.3%)
Non-retail	1 (0.9%)	210sqm (1.5%)
Service	41 (35.0%)	2,695sqm (19.7%)
Vacant	5 (4.3%)	334sqm (2.4%)
Total	117 (100.0%)	13,712sqm (100.0%)

Development and Use Class Changes

Within this monitoring period the following permissions were completed:

- 20/01468/P: 14A High Street: Change of use from B1(a) to C3

The following permissions are under construction:

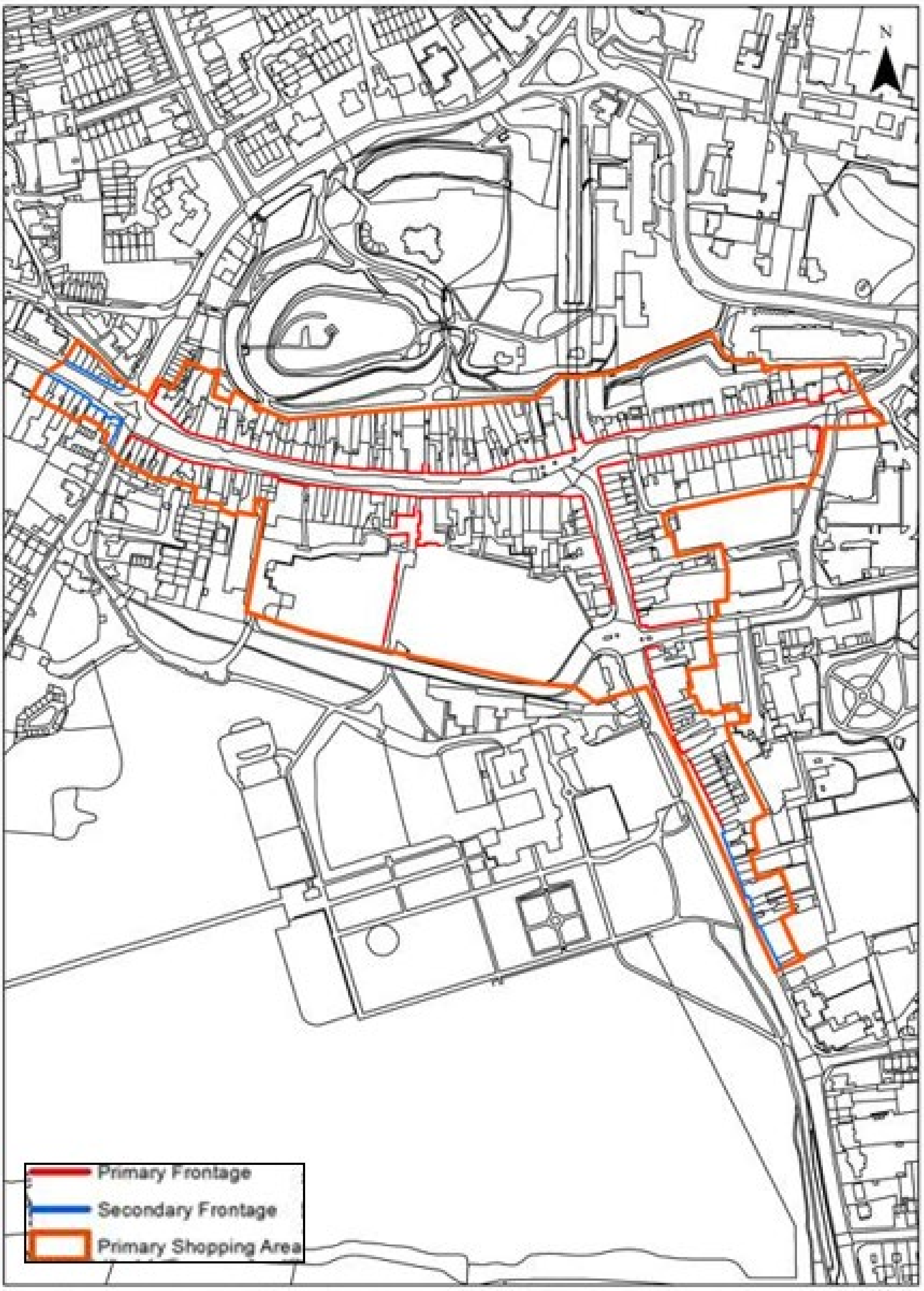
- 16/00882/F: 59 High Street: 56sqm single storey rear extension
- 17/01887/P: Banstead Village Club: Change of use from B1(a) to C3
- 18/01984/F: 41 High Street: Single storey rear extension to increase A1 floorspace by 11sqm

The following planning permissions are extant:

- 19/01999/F: 123 High Street: Extension and change of use from A1 to D1
- 20/02468/F: Land to the rear of 103 High Street: Change of use from E to C3

Note: the permissions refer to the use classes at the time of when the planning permission was granted.

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

Within this monitoring period, nine new retailers have moved into the town centre and ten occupiers have left the town centre. One occupier (Halliwell Marks) has relocated within the town centre. There are currently 15 vacant units within the town centre, the joint most within the borough along with Redhill town centre. This accounts for 7.7% of the units, 6.2% of the frontage and 6.8% of the floorspace within the town centre. Of all four town centres in the borough, Reigate has the highest percentage of vacant net retail floorspace. Compared to the last monitoring period, Reigate has had an increase in the percentage of vacant units, but a decrease in the percentage of net retail floorspace. The percentage of vacant frontage has stayed the same.

- Percentage of vacant units: 7.2% to 7.7%
- Percentage of vacant frontage: 6.2% to 6.2%
- Percentage of vacant net retail floorspace: 7.1% to 6.8%

Table 4 Vacancy rates in Reigate during the monitoring period

Indicator	Vacancy Rate
Percentage of units	7.7%
Percentage of frontage	6.2%
Percentage of net retail floorspace	6.8%

Viability

Figure 2 below show that E Use Class accounts for 90.4% of the units within the primary frontage, whilst for secondary frontage, Figure 3 shows that 93.8% of the units are E Use Class. This includes units within the E Use Class that are currently vacant (E). The SG Use Class accounts for the remaining 9.6% of units within primary frontages, whilst it accounts for 6.3% in secondary frontages.

Figure 2 Vitality (Primary Frontage) in Reigate during the monitoring period

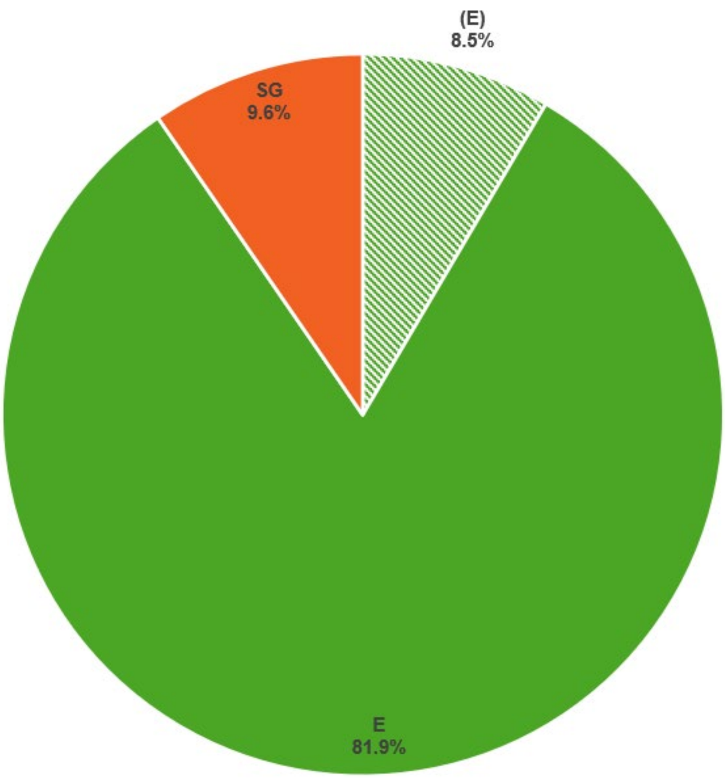
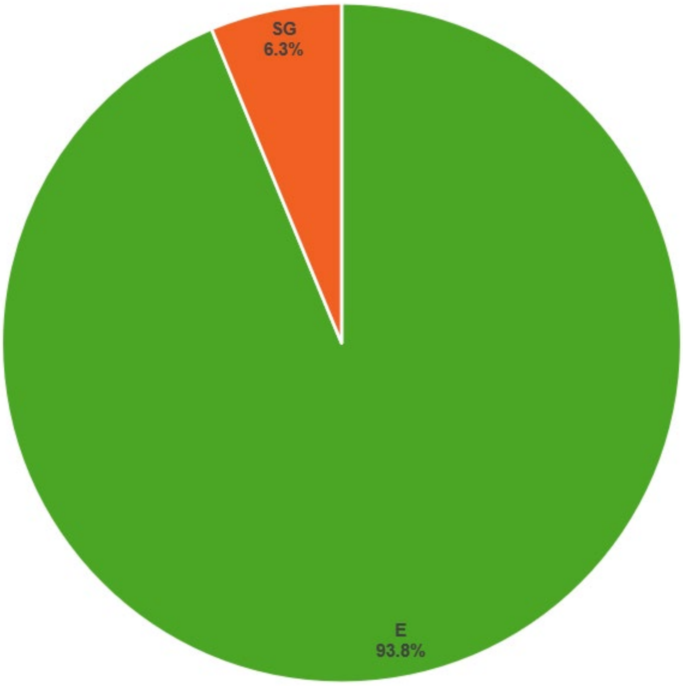


Figure 3 Vitality (Secondary Frontage) in Reigate during the monitoring period



As can be seen in Table 5 below, the greatest proportion of units and floorspace within Reigate town centre is occupied by comparison retail (37.4% and 31.4% 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; 20.6% floorspace).

Table 5 Retail offer in Reigate during the monitoring period

Offer	Units	Net Floorspace
Comparison	73 (37.4%)	6,507sqm (31.4%)
Convenience	8 (4.1%)	5,220sqm (25.2%)
Food and drink	40 (20.5%)	4,153sqm (20.6%)
Non-retail	3 (1.5%)	24sqm (0.1%)
Service	56 (28.7%)	3,407sqm (16.5%)
Vacant	15 (7.7%)	1,399sqm (6.2%)
Total	195 (100.0%)	20,709sqm (100.0%)

Development and Use Class Changes

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

- 19/02545/F: 26 High Street (upper floors): Change of use A2 to C3

The following permissions are under construction:

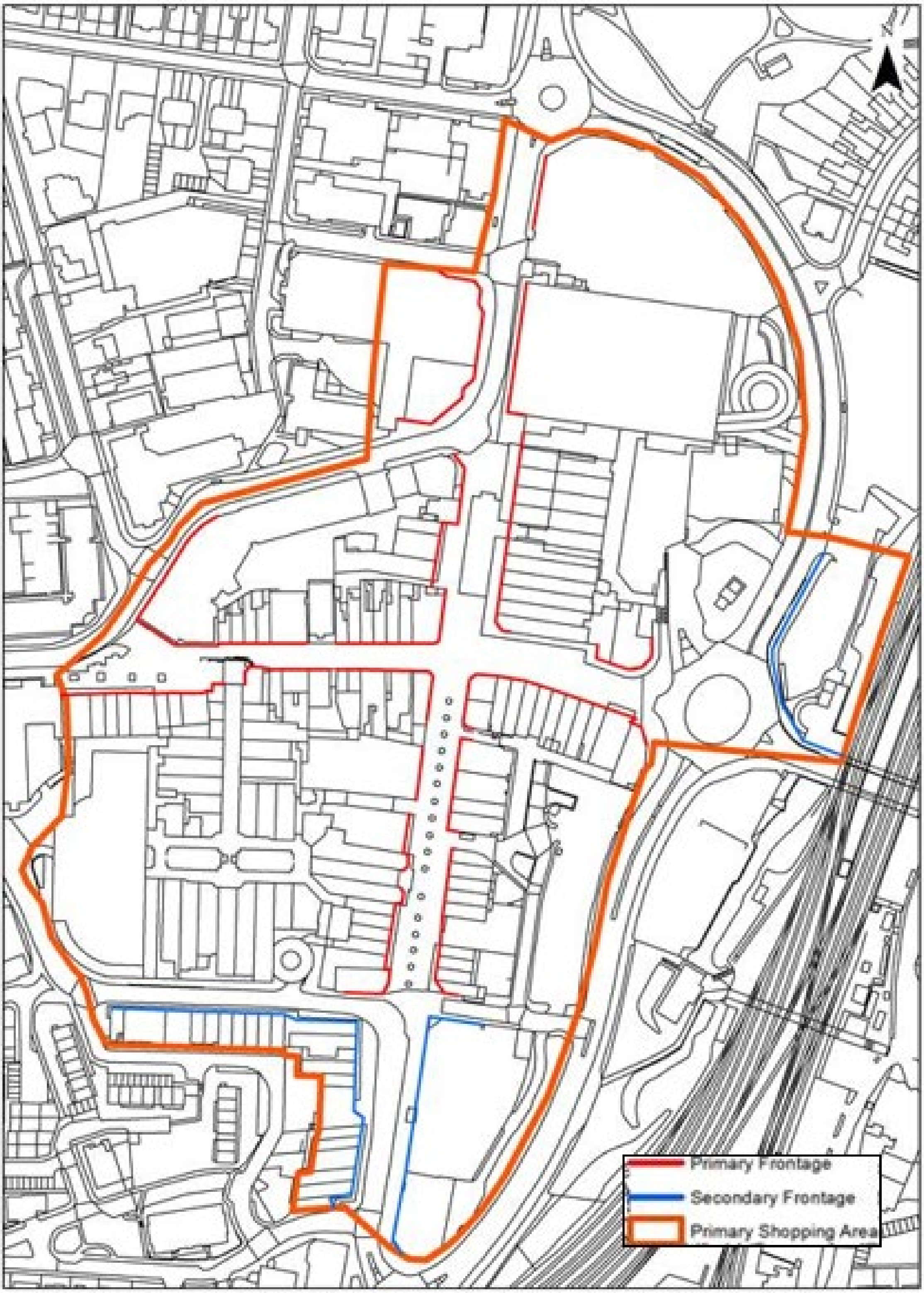
- 18/00829/P: 5a, 7a, 9a, 11a and 13a West Street (upper floors): Change of use B1(a) to C3
- 19/00715/F: Rear of 4-10 Church Street: Loss of 54sqm A2 and provision of C3 accommodation

The following permissions are extant:

- 19/01300/P: 99 Bell Street: Change of use B1(a) to C3
- 20/00097/P: Vale House, Roebuck Close: Change of use B1(a) to C3
- 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

Note: the permissions refer to the use classes at the time of when the planning permission was granted.

2.3. Redhill Town Centre



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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 support and 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

As per the previous monitoring period, 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.

Within this monitoring period, three new occupiers have moved into the town centre, whilst three occupiers have left the town centre. An additional unit with a planning permission at 46-

48 High Street will have a Papa Johns. But at the time of the survey, the store had not yet opened, so for the purposes of this monitor, the unit will still be recorded as vacant unit.

There are currently 15 vacant units within the town centre, which, along with Reigate, is the greatest number of vacant units of all of the town centres in the borough. 9.6% of the frontage within the town centre and 6.5% of the retail floorspace is vacant. Along with Horley town centre, Redhill town centre has the highest proportion of vacant units of all town centres within the borough. When comparing the vacancy rates to the previous monitoring period, the percentage of vacant units has stayed the same, but there has been an increase in the other two vacancy rate indicators. The vacancy rate in Redhill in comparison to the last monitoring period is as follows:

- Percentage of units: 9.6% to 9.6%
- Percentage of frontage: 8.5% to 8.8%
- Percentage of net retail floorspace: 5.2% to 6.0%

Table 6 Vacancy rates in Redhill during the monitoring period

Indicator	Vacancy Rate
Percentage of units	9.6%
Percentage of frontage	8.8%
Percentage of net retail floorspace	6.0%

Viability

Figure 4 below shows that the E Use Class accounts for 89.4% of the units within the primary frontage. Figure 5 shows that the E Use Class accounts for 88.0% of the units within the secondary frontage. This includes units within the E Use Class that are currently vacant (E). 9.9% of units within the primary frontage and 12.0% of units within the secondary frontage are Sui Generis uses. This includes units within the Sui Generis use class that are currently vacant (SG). The remaining 0.8% of primary frontages are within the F.1 Use Class.

Figure 4 Vitality (Primary Frontage) in Redhill during the monitoring period

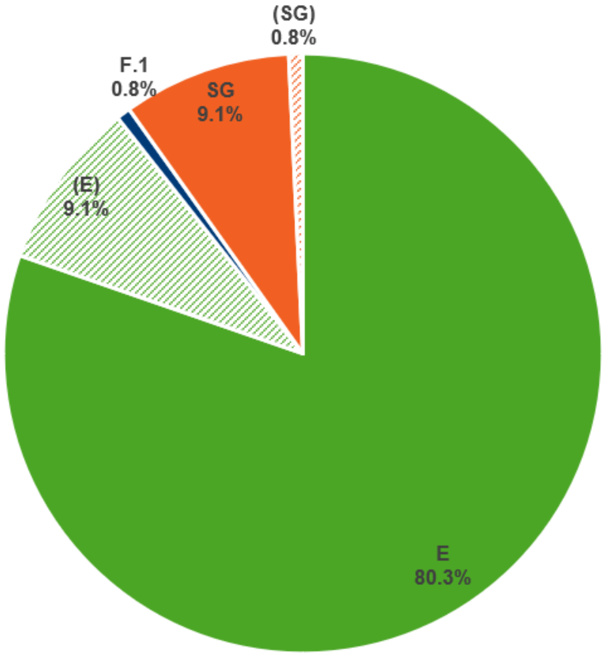
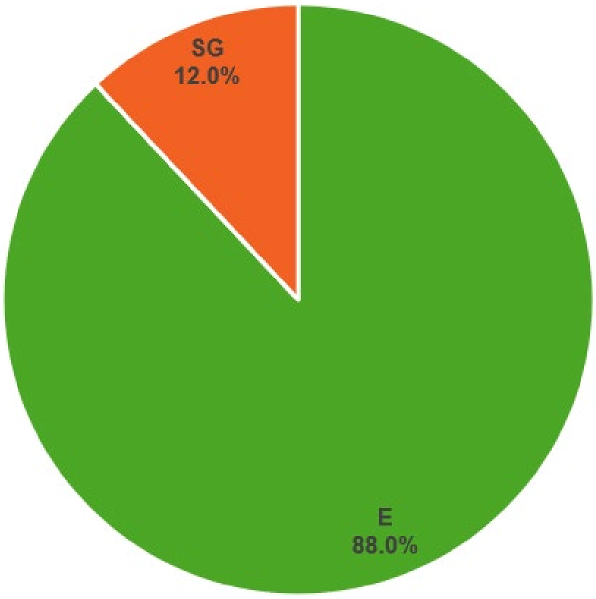


Figure 5 Vitality (Secondary Frontage) in Redhill during the monitoring period



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 retail units.

Table 7 Retail offer in Redhill during the monitoring period

Offer	Units	Net Floorspace
Community	1 (0.6%)	587sqm (1.3%)
Comparison	60 (38.2%)	20,634sqm (44.9%)
Convenience	12 (7.6%)	15,303sqm (33.3%)
Food and drink	16 (10.2%)	2,314sqm (5.0%)
Non-retail	7 (4.5%)	224sqm (0.5%)
Service	46 (29.3%)	4,149sqm (9.0%)
Vacant	15 (9.6%)	2,734sqm (6.0%)
Total	157 (100%)	45,945sqm (100.0%)

Development and Use Class Changes

No planning permissions have been completed within this monitoring period.

The following permissions are under construction:

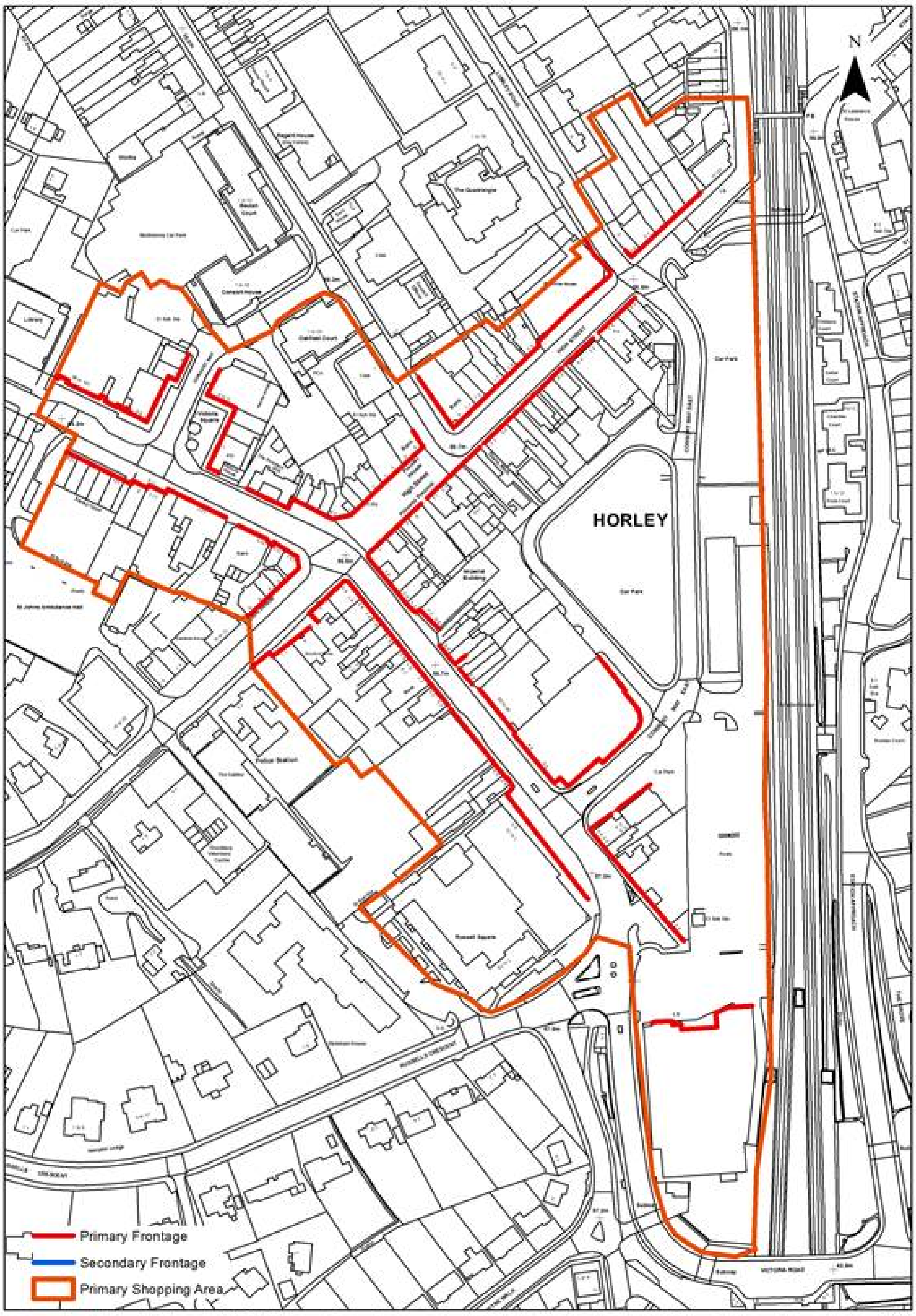
- 16/01066/F: Marketfield Public Car Park, Marketfield Way: Redevelopment to form new residential and retail accommodation
- 17/03013/F: 36-38 Station Road (upper floors): Change of use from A1 and A2 to C3
- 18/01158/F: 16-46 Cromwell Road: Redevelopment to form new residential and retail accommodation
- 20/01331/CU: 46-48 High Street: Change of use from A3 to A3 and A5

The following permissions are extant:

- 18/01857/F: The Abbot Public House, 14 Station Road: Change of use from A4 to SG
- 18/02668/F: 46 Station Road: Demolition of rear elements and extension/ reconfiguration/ conversion to provide C3 accommodation
- 19/02534/CU: 52 High Street: Change of use from A1 to A3 and D2
- 20/02458/CU: 33 Station Road: Change of use from E to E and SG

Note: the permissions refer to the use classes at the time of 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 an independent department store (Collingwood Batchelor's). Horley Railway Station lies just 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

Within this monitoring period, three occupiers have moved into units within the town centre. Five occupiers have left the town centre over the course of the monitoring period.

There are currently 11 vacant units within the town centre. Along with Redhill town centre, Horley town centre has the greatest proportion of vacant units of all the town centres in the borough (9.6%). Horley also has the highest proportion of vacant frontage of all four town centres, at 12.5%. When comparing the vacancy rates to the previous monitoring period, there has been an increase in all vacancy rate indicators. The vacancy rate in Horley in comparison to the last monitoring period is as follows:

- Percentage of vacant units: 7.8% to 9.6%
- Percentage of vacant frontage: 10.3% to 12.5%
- Percentage of vacant net retail floorspace: 5.0% to 5.9%

Table 8 Vacancy rates in Horley during the monitoring period

Indicator	Vacancy Rate
Percentage of units	9.6%
Percentage of frontage	12.5%
Percentage of net retail floorspace	5.9%

Viability

The diagram below shows that 82.6% of units are within the E Use Class, whilst 14.8% of the units are classed as a sui generis use. This includes units within the E and sui generis Use Class that are currently vacant ((E) and (SG)). The remainder of the units are a mix of Use Class E and sui generis use, and F.1 uses.

Figure 6: Vitality in Horley during the monitoring period

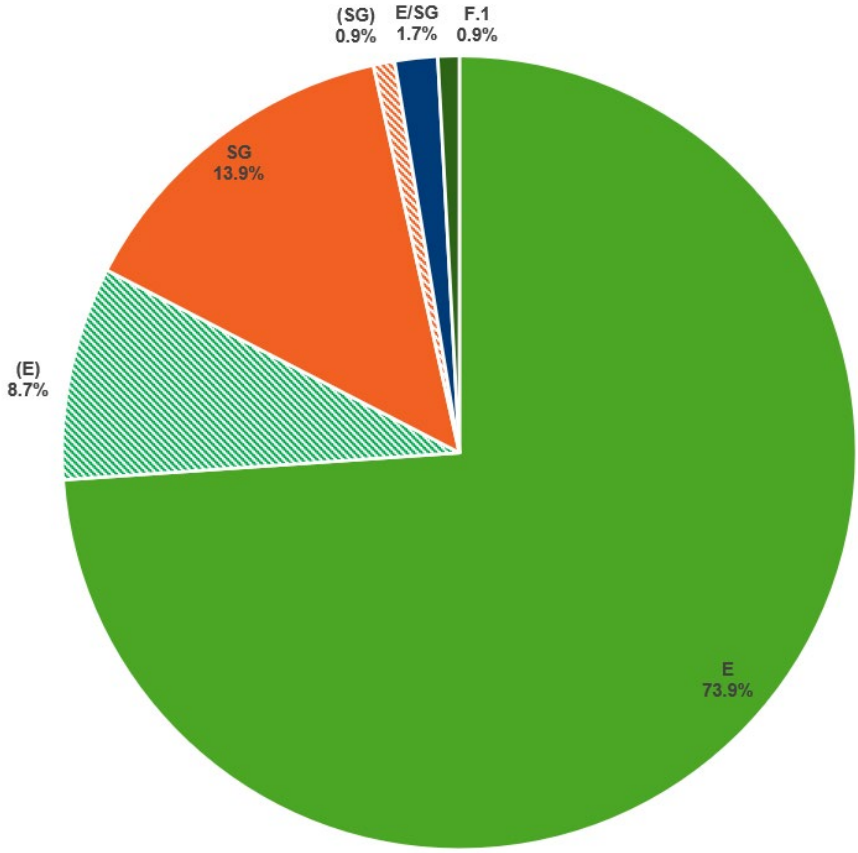


Table 9 below shows that the greatest proportion of units are occupied by services (33.0%). Although comparison retail only accounts for the third highest percentage of units, it accounts for the greatest proportion of retail floorspace in Horley (29.2%).

Table 9 Retail offer in Horley during the monitoring period

Offer	Units	Net Floorspace
Comparison	23 (20.0%)	5,624sqm (29.2%)
Convenience	9 (7.8%)	5,189sqm (27.0%)
Food and drink	26 (22.6%)	3,362sqm (17.5%)
Non-retail	9 (7.8%)	1,101sqm (5.7%)
Service	37 (32.2%)	2,844sqm (14.8%)
Vacant	11 (9.6%)	1,132sqm (5.9%)
Total	115 (100.0%)	19,253sqm (100.0%)

Development and Use Class Changes

No planning permissions have been completed within this monitoring period.

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).
- 18/00320/P: Ground Floor 83 Victoria Road: Change of use from A1 to C3
- 19/02166/F: 34 High Street: Demolition of rear of existing building and erection of C3 extension

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
- 20/00867/P: R/O 11-15 High Street, Horley: Change of use A2 to C3
- 20/02095/P: Hereford House, 7-9 Massetts Road: Change of use from B1(a) to C3
- 20/02823/P: Victoria House, Consort Way: Change of use from B1(a) to C3

Note: the permissions refer to the use classes at the time of when the planning permission was granted.

3. Overview and Summary

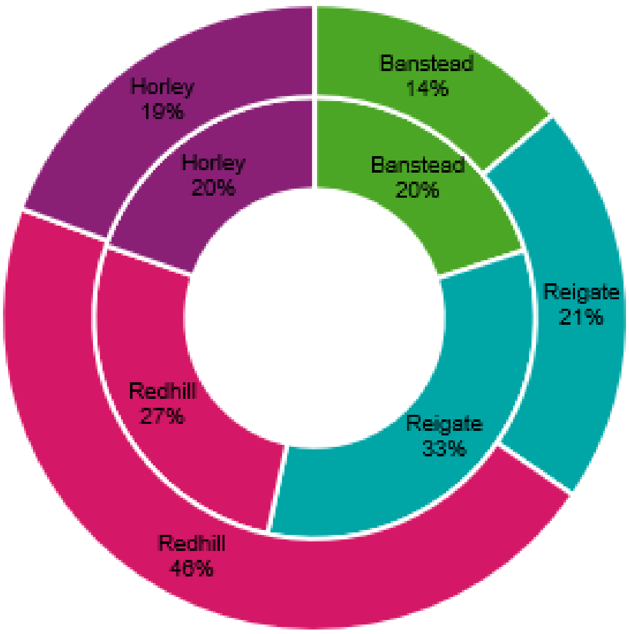
This chapter brings together the individual analysis of the town centres.

3.1. Town Centre Composition

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

The diagram below shows that almost half of the floorspace of all 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 7 – Distribution of town centre retail units and floorspace (units inner, floorspace outer)



3.2. Vacancy Trend

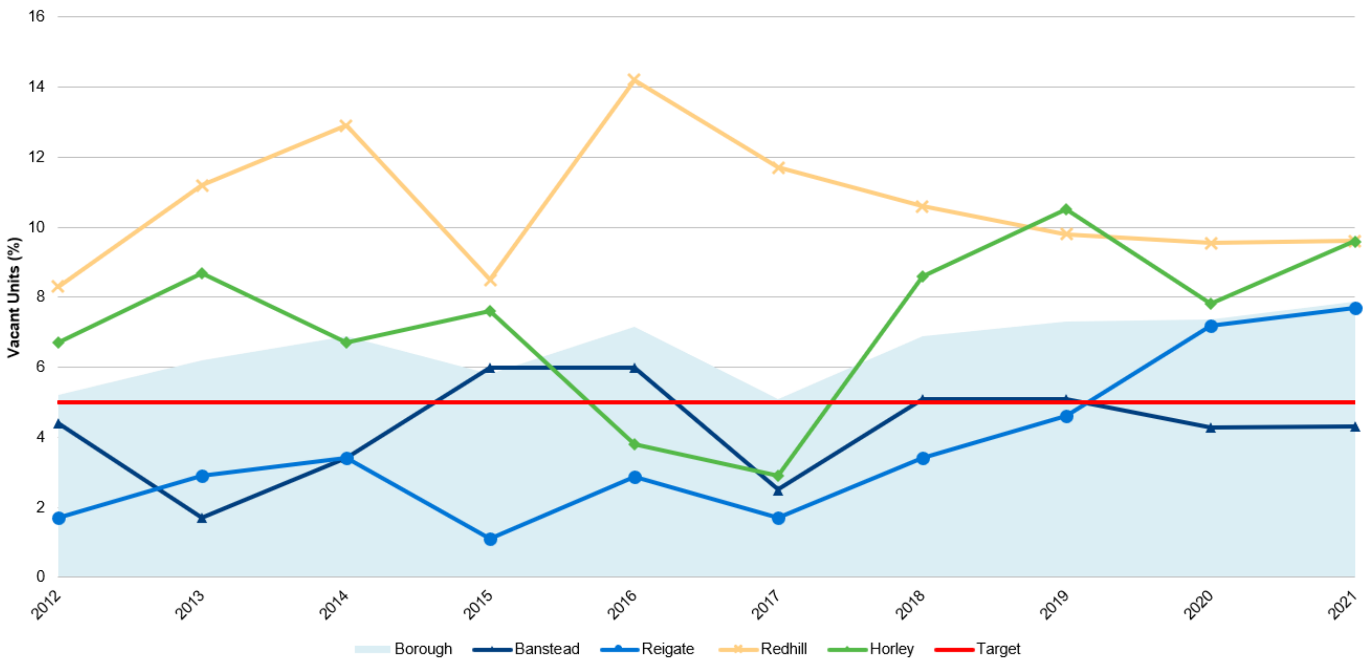
Table 10 below shows that overall, there are 46 vacant units. This is an increase of three units from the previous monitoring period. The greatest number of vacant units are in Redhill and Reigate (both with 15), followed by Horley and then Banstead. Compared to the previous monitoring period, Horley has had increase of two vacant units, and Reigate an increase of one. Banstead and Redhill have the same number of vacant units from the previous monitoring period.

Table 10 Number of vacant units in each of the town centres during the monitoring period

Type	Number of Vacant Units
Banstead	5
Reigate	15
Redhill	15
Horley	11

The graph in Figure 8 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 and Horley jointly have the highest vacancy rates in the borough (9.6%), followed by Reigate (7.7%). This, however, still compares favourably to the national vacancy rate for high streets from the first quarter of 2021 of 14.1%, according to the British Retail Consortium-Local Data Company Vacancy Monitor. Compared to the previous monitoring period, the vacancy rate of units in Reigate and Horley have gone up, whilst Redhill and Banstead have stayed the same. The overall borough-wide percentage of vacant units has also increased from the previous monitoring period, from 7.4% to 7.9%.

Figure 8: Trend of vacant unit percentage in RBBC from 2012-2021 (this includes additional units within town centre frontages from 2020)



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.

Table 11 below shows that Horley has the greatest proportion of vacant frontage (12.5%), whilst Banstead has the least (3.1%). All vacant units within the town centres are scattered throughout the centres. Overall, 7.8% of all of the town centres frontage is vacant.

Table 11 Vacant frontage of each of the town centres during the monitoring period

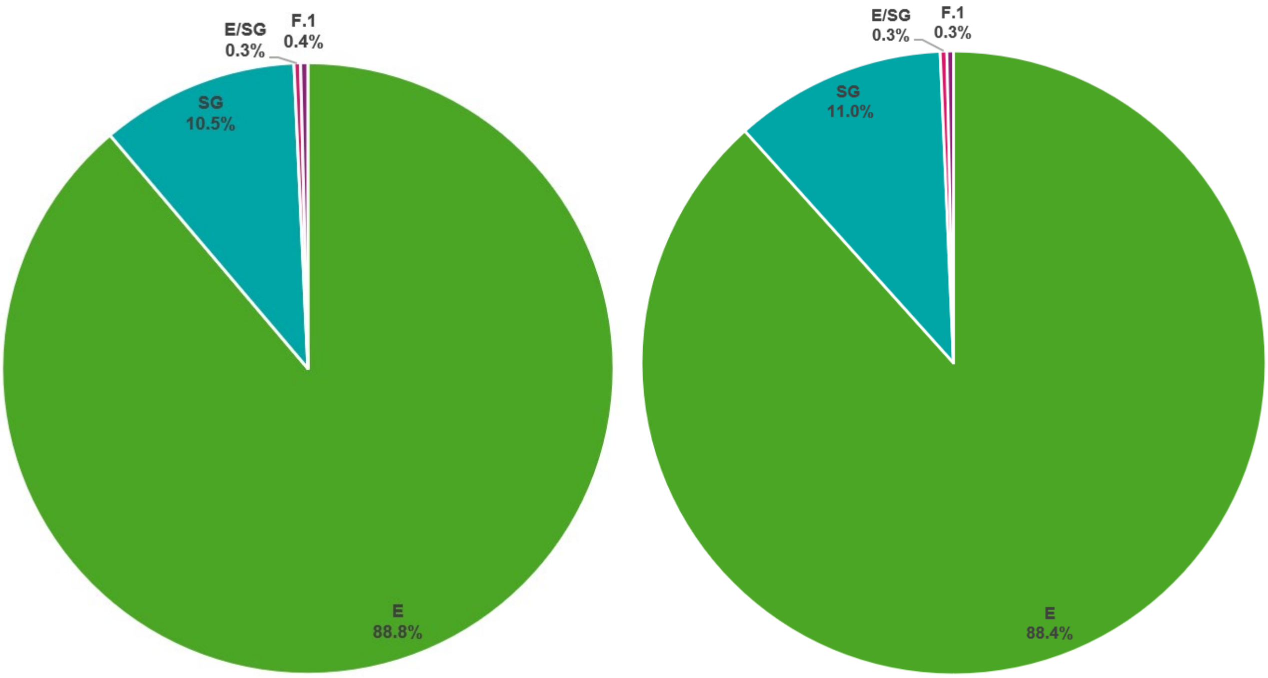
Type	Vacancy Rate
Banstead	3.1%
Reigate	6.2%
Redhill	8.8%
Horley	12.5%

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 approximately 88.8% and 88.4% of both the frontage length and number of units respectively within the town centres fall within E Use Class. SG amounts for around 11% of both frontage length and number of units. The remaining percentages are completed by a mix of E and Sui Generis use classes and F.1 use classes.

Figure 9: Use Class composition of all town centres during the monitoring period, with frontage length of each use class on the left and number of units of each use class on the right



3.4. Retail Offer

The 'offer' within the town centre provides an indication of the types of shops and services in the town centre. Table 12 below shows that comparison retail occupies the greatest number of units (30.8%) and total floorspace in all four town centres in the borough (35.6%). Services offers the second greatest amount of units within all four town centres (30.8%). However, convenience retail occupies the second greatest amount of floorspace in all the town centres (31.1%), although only 7.5% of the units due to a number of large supermarkets within the borough's town centres, such as the Waitrose stores in Horley and Banstead. Community uses occupy the least number of units and floorspace (0.2% and 0.6% respectively).

Please refer to Tables 13-17 for which uses are in which category.

Table 12 Breakdown of retail offer in all town centres

Type of Retail Offer	Units	Floorspace
Community	1 (0.2%)	587sqm (0.6%)
Comparison	189 (32.4%)	35,483sqm (35.6%)
Convenience	44 (7.5%)	30,954sqm (31.1%)
Food and drink	104 (17.8%)	12,342sqm (12.4%)
Non-retail	20 (3.4%)	1,558sqm (1.6%)
Service	180 (30.8%)	13,095sqm (13.1%)
Vacant	46 (7.9%)	5,600sqm (5.6%)
Total	584	99,619sqm

Figure 10 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 in all town centres, whilst non-retail, community and vacant premises occupy smaller percentages. The largest percentage of retail floorspace on offer in Horley, Redhill and Reigate is with comparison retail (29.2%, 45.7% and 31.4% respectively), whilst the highest percentage of retail floorspace in Banstead is with convenience retail (38.2%).

Figure 10 Percentage of floorspace for each retail offer in all four town centres

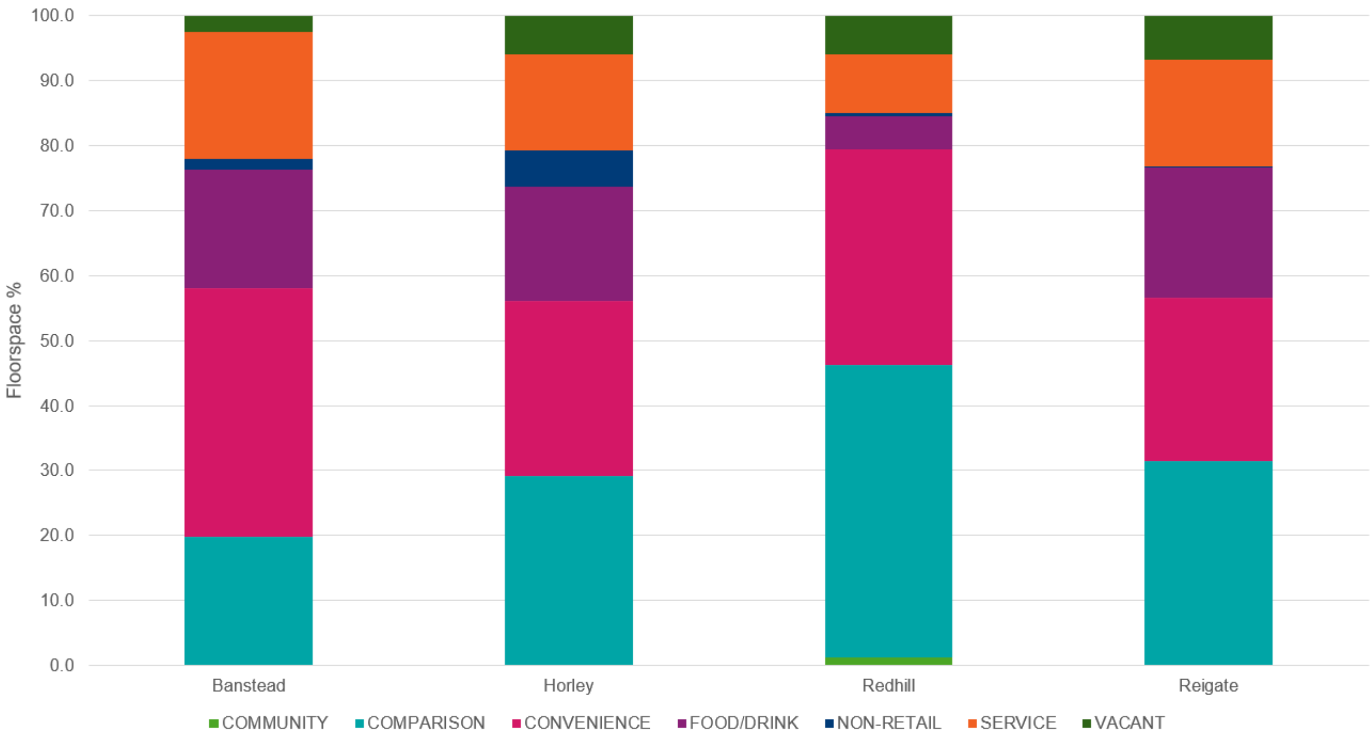
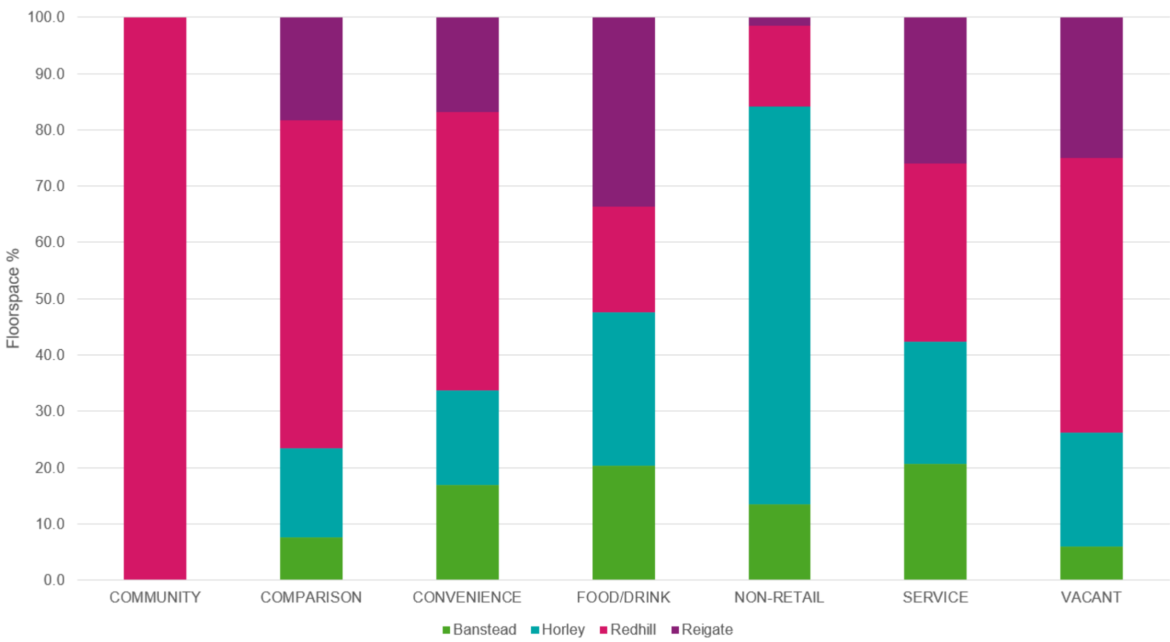


Figure 11 below shows the retail offer of floorspace within the town centres. It shows that Redhill town centre has the greatest proportion of comparison, convenience, community and service accommodation. Reigate town centre has the greatest proportion of food and drink offer with regards to floorspace. Horley town centre has the greatest proportion of non-retail floorspace of all town centres within the borough.

Figure 11: Percentage offer by retail category in floorspace in each town centre



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 uses are within Redhill town centre, whilst the greatest proportion of convenience retail and services is located within Banstead. The largest percentage of food and drink establishments and other retail units are located in Horley.

Clothing, footwear and accessories are the most common type of comparison retail, and this is also the case in Banstead, Reigate and Horley (11, 27 and 8 units respectively). The most common comparison retail offer in Redhill is other comparison retail (21 units). Food/supermarkets are the most common convenience retail offer overall, and this is also the case in all four town centres. Cafe/sandwich bars and restaurants are jointly the most common food and drink establishments overall with 36 units. Restaurants are the most common food and drink establishments in Banstead and Reigate (11 and 16 units respectively), whilst cafe/sandwich bars are the most common food and drink establishments in Redhill and Horley (9 and 10 units respectively). Hair and beauty services are the most common service offer overall with 55 units, and this is also the case in Banstead and Reigate (14 and 21 units respectively). Hair and beauty are also the most common service offer in Redhill and Horley, but this is held jointly with estate agents (all 10 units). Horley has the most non-retail units (9), whilst Redhill is the only town centre that has a community offer. Reigate and Redhill equally have the greatest number of vacant units (15). Clothing, footwear and accessories and hair and beauty are the most common retail type of all types of retail on offer.

Table 13 Detailed breakdown of 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%)	5 (2.6%)	6 (3.8%)	6 (5.2%)	25 (4.3%)
Clothing, footwear and accessories	11 (9.4%)	27 (13.8%)	19 (12.1%)	8 (7.0%)	65 (11.1%)
Electronics and technology	0 (0.0%)	3 (1.5%)	7 (4.5%)	0 (0.0%)	10 (1.7%)
Home and DIY	8 (6.8%)	10 (5.1%)	2 (1.3%)	4 (3.5%)	24 (4.1%)
Other comparison retail (e.g. gifts, florists etc.)	5 (4.3%)	23 (11.8%)	21 (13.4%)	5 (4.3%)	54 (9.2%)
Total Comparison	33 (28.2%)	73 (37.4%)	60 (38.2%)	23 (20.0%)	189 (32.4%)

Table 14 Detailed breakdown of convenience retail (units)

Type of Retail Offer	Banstead	Reigate	Redhill	Horley	Total
Chemist/Pharmacy	4 (3.4%)	2 (1.0%)	3 (1.9%)	2 (1.7%)	11 (1.9%)
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%)	9 (7.8%)	44 (7.5%)

Table 15 Detailed breakdown of food and drink establishments (units)

Type of Retail Offer	Banstead	Reigate	Redhill	Horley	Total
Café/Sandwich bar	6 (5.1%)	11 (5.6%)	9 (5.7%)	10 (8.7%)	36 (6.2%)
Pub/Bars	0 (0.0%)	9 (4.6%)	3 (1.9%)	3 (2.6%)	15 (2.6%)
Restaurant	11 (9.4%)	16 (8.2%)	3 (1.9%)	6 (5.2%)	36 (6.2%)
Take-away	5 (4.3%)	4 (2.1%)	1 (0.6%)	7 (6.1%)	17 (2.9%)
Total Food and Drink Establishment	22 (18.8%)	40 (20.5%)	16 (10.2%)	26 (22.6%)	104 (17.8%)

Table 16 Detailed breakdown of services (units)

Type of Retail Offer	Banstead	Reigate	Redhill	Horley	Total
Banking	3 (2.6%)	4 (2.1%)	9 (5.7%)	2 (1.7%)	18 (3.1%)
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%)	13 (6.7%)	10 (6.4%)	10 (8.7%)	40 (6.8%)
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%)	7 (4.5%)	8 (7.0%)	31 (5.3%)
Travel agents	0 (0.0%)	2 (1.0%)	1 (0.6%)	0 (0.0%)	3 (0.5%)
Total Services	41 (35.0%)	56 (28.7%)	46 (29.3%)	37 (32.2%)	180 (30.8%)

Table 17 Detailed breakdown of other (units)

Type of Retail Offer	Banstead	Reigate	Redhill	Horley	Total
Non-Retail	1 (0.9%)	3 (1.5%)	7 (4.5%)	9 (7.8%)	20 (3.4%)
Community	0 (0.0%)	0 (0.0%)	1 (0.6%)	0 (0.0%)	1 (0.2%)
Vacant	5 (4.3%)	15 (7.7%)	15 (9.6%)	11 (9.6%)	46 (7.9%)
Total Other	6 (5.1%)	18 (9.2%)	23 (14.6%)	20 (17.4%)	67 (11.5%)

3.6. Future Trends

The retail industry has continued to change significantly since the impact of the Covid-19 pandemic. Although the general trend for most retail has followed a similar trend to that of 2020, there is hope that, with the vaccination rollout, the retail industry can restructure its growth. However, as stated within the Retail Gazette, any change back to previous levels is dependent on various Covid-related factors, including infection rates, vaccination distribution, restrictions on movement, and any restrictions on the retail industry specifically through tiered systems and national lockdowns.

The Centre for Retail Research has forecasted that retail sales in 2021 will grow by 2.4% compared to 2020 levels, but will still be lower than those figures achieved in 2019. They also forecasted that although a vast majority of retail sales will still occur online, there would be drop off from 2020 levels due to stores gradually beginning to reopen throughout the year. The study also forecasted that as lockdowns begin to ease, non-food sales in-store in 2021 are expected to increase by 15.1% compared to 2020 levels.

Retail Economics has highlighted 10 themes for the outlook for retail industry in the UK, with these being:

- The changing face of consumers
- Long term impact of Covid-19
- Channel shift to online
- Prioritising digital in the customer journey
- The changing role of stores
- Brands connecting directly with consumers
- Raising Environmental Social and Governance credentials
- Developing resilient supply chains
- Managing Brexit policies
- Updating business models

The way the average consumer shops has changed significantly to online retail during the pandemic. Even when shoppers have been venturing outside when lockdown restrictions are eased, there is a tendency for them to avoid historically crowded places for more local or out-of-town shopping. A study produced by both Vouchercodes and the Centre for Retail Research found that people in the UK had mixed feelings about returning to physical stores, with around one quarter of the participants saying they were not very interested in going back to stores.

This has subsequently had large impact on the frontage of retail in some town centres, where many retailers are reducing their needs for stores, and are instead opting for a wider online selection. To prepare for these changes, Modern Retail states some important steps to prepare for this, such as:

- Contingency planning
- Upskilling staff
- Investing in technology
- Preparing a website
- Improving omnichannel offering
- Becoming more-eco-friendly
- Defining and communicating values and USPs

- Making customers feel safe
- Using physical stores more strategically

Although some retailers are closing their high street frontage, Retail Economics instead notes the opportunities for retailers in 2021 and beyond, which includes:

- Gaps forming in the market as administrations occur
- Points along the customer journey where relationships can be strengthened
- Engagement of new customer segments online
- Streamlining processes for greater efficiency
- New partnerships to enhance propositions and capabilities
- Innovation between in-store and online for new consumer experiences
- Fostering genuine consumer relationships in challenging times

When considering how the retail industry will transition from 2021 to 2022, the study produced by Vouchercodes and the Centre for Retail Research found that, as long as lockdown continue to ease, UK retail sales are predicted to grow by a further 5% from 2021 levels, an increase of £20.4bn. The study also predicts that spending in the South East will increase by around £400 per head in 2022 for both online and offline retail sales, again suggesting that retail within town centres may begin to recover from the pandemic. 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**

Use Class before 1st September 2020	Uses	Use Class from 1 September 2020
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)**