



Town Centre Monitor

April 2022

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Please Note:

The information contained within this monitor details data from town centres in Reigate and Banstead during the period May 2021 to April 2022.

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 April 2021 to March 2022, with survey work undertaken in April 2022.

During this monitoring period, town centres have continued to have been impacted by, and have responded to, the impact of the Coronavirus (Covid-19) pandemic. The beginning of this monitoring period coincided with the gradual lifting of the third national lockdown, with non-essential retail re-opening in April 2021. When allowed to re-open, the Council encouraged 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. The end of this monitoring period coincided with Russia's invasion of Ukraine in February 2022, which has contributed to rising inflation and the cost of living.

1.1. Policy Context

Following the adoption of the Development Management Plan (DMP) in September 2019, the Reigate and 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

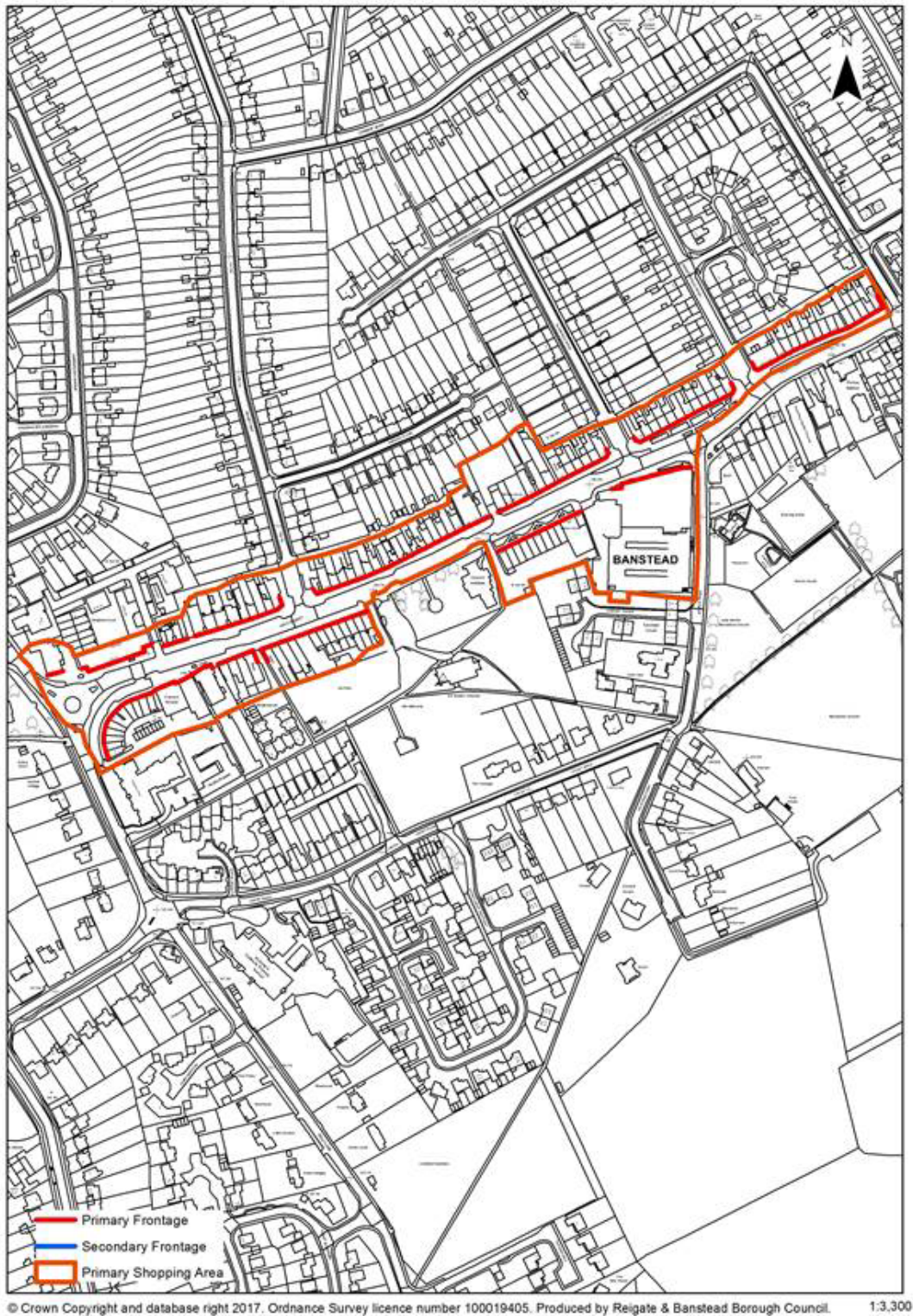
Frontages' is the promotion of retail uses and the resistance of excessive change away from core retail uses.

This monitoring period has been affected by recent changes to the Use Classes Order. The Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020 introduced from 1st September 2020 resulted in 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



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 and New Occupiers

Within this monitoring period, seven new occupiers have moved into the village, whilst six occupiers have left the village.

Banstead has the least number of vacant units of all four town centres. There are currently four vacant units within the village. The percentage of vacant units and frontage have both decreased compared to the previous monitoring period, whereas the net retail floorspace has increased. Of all town centres in the borough, Banstead has the lowest percentage of vacant frontage.

- Percentage of vacant units: 4.3% to 3.4%
- Percentage of vacant frontage: 3.1% to 2.5%
- Percentage of vacant net retail floorspace: 2.4% to 3.4%

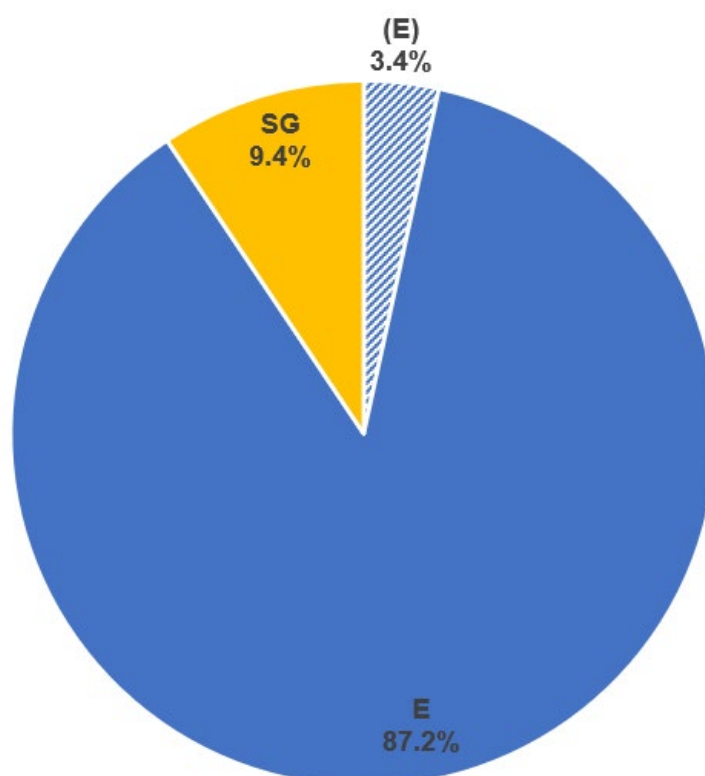
Table 2 Vacancy rates in Banstead during the monitoring period

Indicator	Vacancy Rate
Percentage of units	3.4%
Percentage of frontage	2.5%
Percentage of net retail floorspace	3.4%

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	30 (25.6%)	2,553sqm (18.6%)
Convenience	17 (14.5%)	5,371sqm (39.2%)
Food and drink	22 (18.8%)	2,512sqm (18.3%)
Non-retail	1 (0.9%)	210sqm (1.5%)
Service	43 (36.8%)	2,706sqm (19.6%)
Vacant	4 (3.4%)	465sqm (3.4%)
Total	117 (100.0%)	13,816sqm (100.0%)

Development and Use Class Changes

Within this monitoring period the following permissions were completed:

- 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
- 19/01999/F: 123 High Street: Extension and change of use from A1 to D1

The following permissions are under construction:

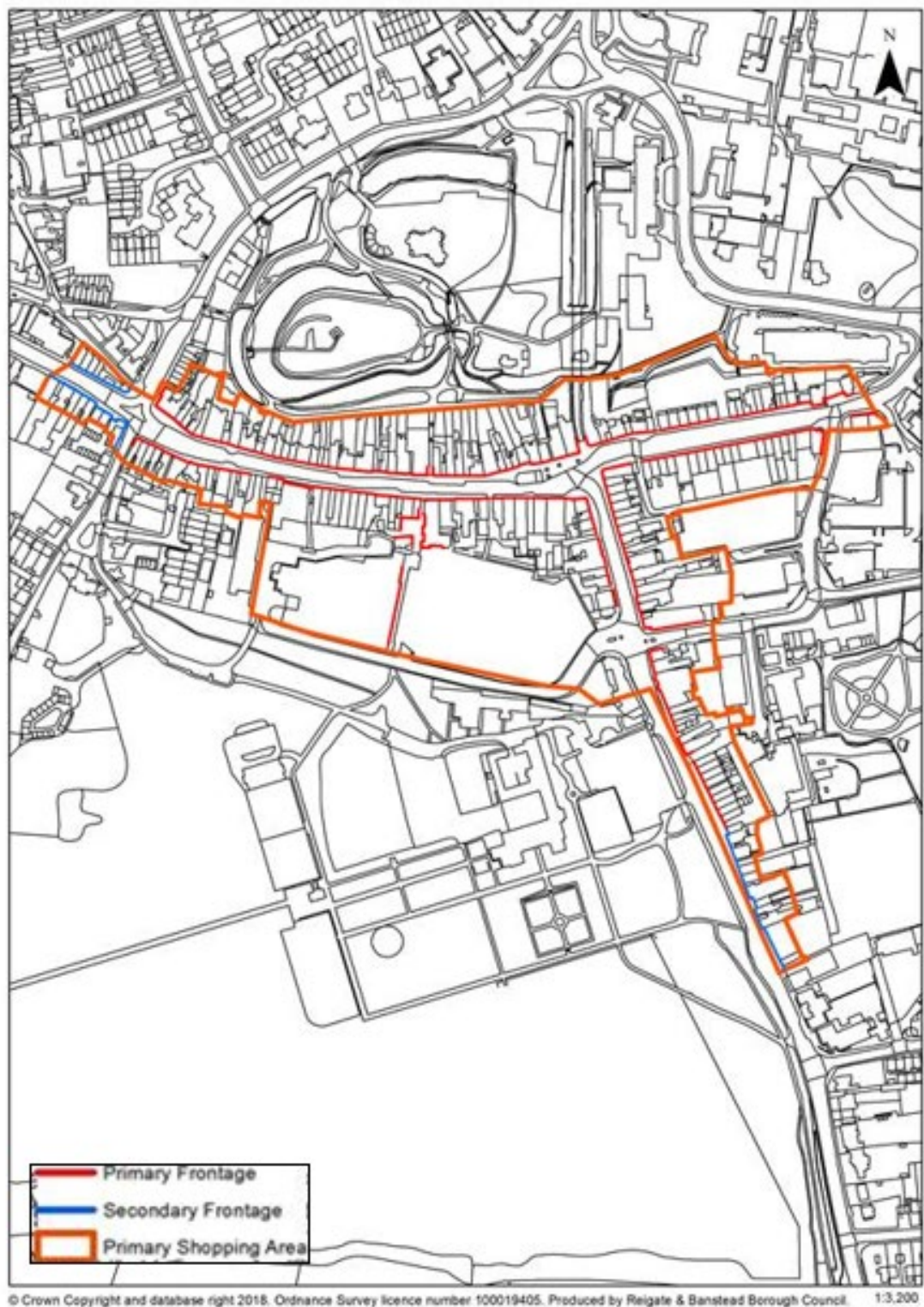
- 18/01984/F: 41 High Street: Single storey rear extension to increase A1 floorspace by 11sqm

The following planning permissions are extant:

- 20/02468/F: Land to the rear of 103 High Street: Change of use from E to C3
- 21/01507/F: 133A High Street: Change of use of upper floors from D1 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



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 and 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 and New Occupiers

Within this monitoring period, 15 new retailers have moved into the town centre and six occupiers have left the town centre. There are currently six vacant units within the town centre. This accounts for 3.1% of the units, 3.2% of the frontage and 2.0% of the floorspace within the town centre. Reigate has the lowest percentage of vacant units and net retail floorspace of all four town centres. Compared to the last monitoring period, there has been a significant decrease in all the vacancy indicators in Reigate.

- Percentage of vacant units: 7.7% to 3.1%
- Percentage of vacant frontage: 6.2% to 3.2%
- Percentage of vacant net retail floorspace: 6.8% to 2.0%

Table 4 Vacancy rates in Reigate during the monitoring period

Indicator	Vacancy Rate
Percentage of units	3.1%
Percentage of frontage	3.2%
Percentage of net retail floorspace	2.0%

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 83.3% 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 16.7% in secondary frontages.

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

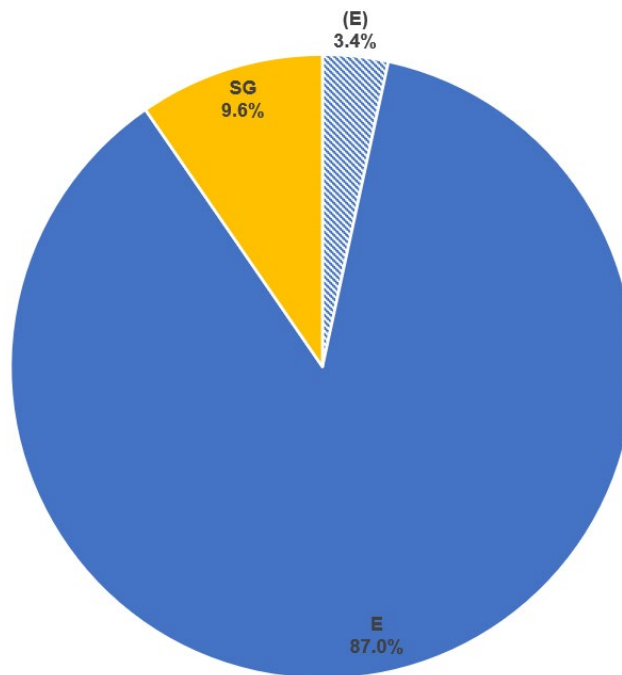
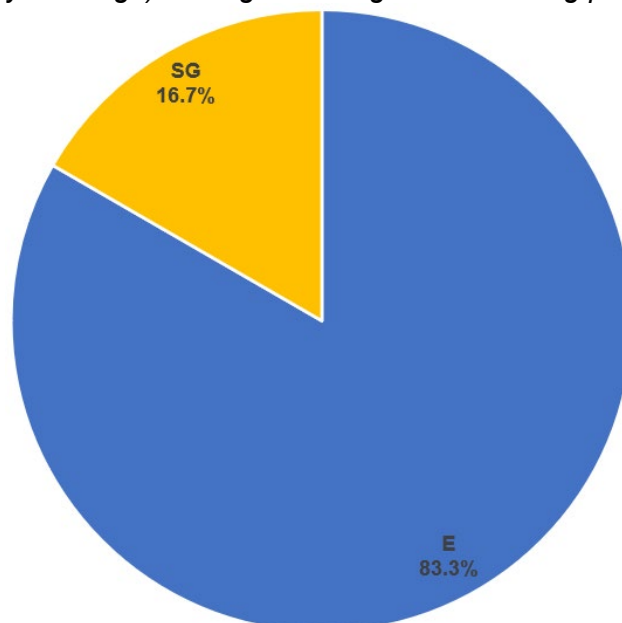


Figure 3 Vitality (Secondary Frontage) in Reigate during the monitoring period



As can be seen in Table 5 below, the greatest proportion of units and floorspace within Reigate town centre is occupied by comparison retail (39.0% and 33.6% respectively). Convenience retail accounts for only 4.6% of the units but over a quarter of the floorspace, which is predominantly due to the large Morrisons supermarket within the town centre. Food and drink uses are well represented within the town centre (22.1% units; 22.4% floorspace).

Table 5 Retail offer in Reigate during the monitoring period

Offer	Units	Net Floorspace
Comparison	76 (39.0%)	6,953sqm (33.6%)
Convenience	9 (4.6%)	5,326sqm (25.7%)
Food and drink	43 (22.1%)	4,632sqm (22.4%)
Non-retail	3 (1.5%)	24sqm (0.1%)
Service	58 (29.7%)	3,366sqm (16.3%)
Vacant	6 (3.1%)	409sqm (2.0%)
Total	195 (100.0%)	20,709sqm (100.0%)

Development and Use Class Changes

Within this monitoring period the following permissions were completed:

- 20/00675/F: 45 Church Street: Change of use B1(a) to C3

The following permissions are under construction:

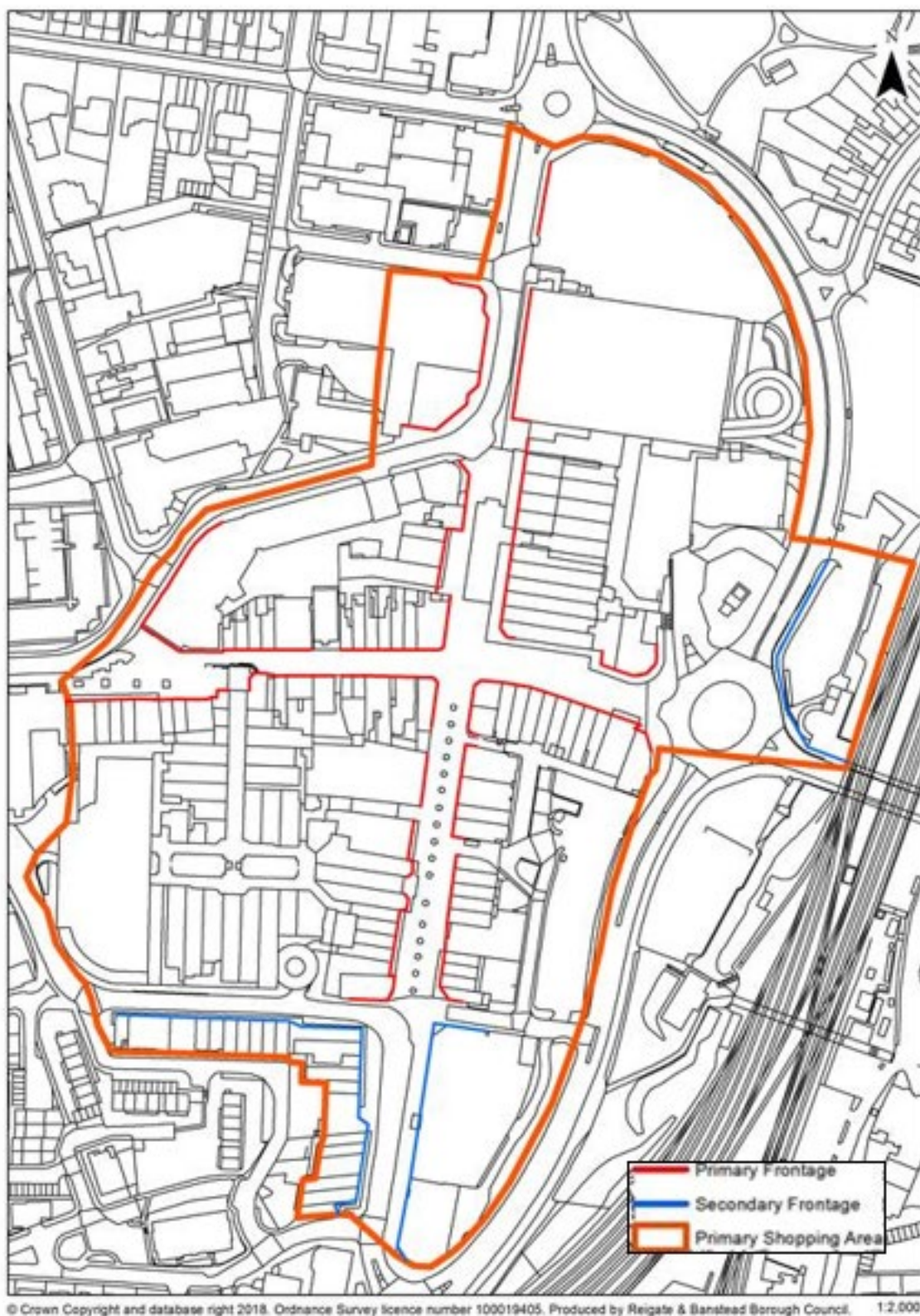
- 19/00715/F: Rear of 4-10 Church Street: Loss of 54sqm A2 and provision of C3 accommodation
- 21/01323/P: 5a, 7a, 9a, 11a and 13a West Street: Development of 14 new flats
- 21/02082/P: Just Retirement, Vale House, Roebuck Close: Change of use B1(a) to C3
- 21/02122/P: Chalk Hills Bakery, 75 Bell Street: Change of use B1(a) to C3
- 21/02679/P: Integration UK Ltd, Westcroft, 16 West Street: Conversion of offices (B1(a)) to 11 apartments (C3)
- 21/03309/P: Chalk Hills Bakery, 75 Bell Street: Change of use D2 to C3

The following permissions are extant:

- 19/01300/P: 99 Bell Street: 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
- 20/00978/P: 7-11 High Street (upper floors): Change of use B1(a) to C3
- 21/02120/CU: 21-23 High Street: Change of use from A2 to A1 and development of two flats
- 21/02800/P: Roebuck House, Bancroft Lane: 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



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 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 within this monitoring period, including the residential redevelopment of the Former Liquid and Envy site and the mixed-use retail and residential redevelopment on Cromwell Road. One major regeneration project is currently under construction, the mixed-use retail, leisure and residential accommodation at The Rise, Marketfield Way. It is anticipated that these major regeneration projects 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 to 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 and New Occupiers

As per the previous monitoring period, the units under redevelopment at Marketfield Way have been excluded from this monitor as they have been demolished as part of the redevelopment works.

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

There are currently 13 vacant units within the town centre, which is the greatest number of vacant units of all the town centres in the borough. 7.8% of the frontage within the town centre and 4.9% of the retail floorspace is vacant. When comparing the vacancy rates to the previous monitoring period, the percentage of vacant units, frontage and net retail floorspace have all decreased. The vacancy rate in Redhill in comparison to the last monitoring period is as follows:

- Percentage of units: 9.6% to 8.2%
- Percentage of frontage: 8.8% to 7.8%
- Percentage of net retail floorspace: 6.0% to 4.9%

Table 6 Vacancy rates in Redhill during the monitoring period

Indicator	Vacancy Rate
Percentage of units	8.2%
Percentage of frontage	7.8%
Percentage of net retail floorspace	4.9%

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 88.9% 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 11.1% 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

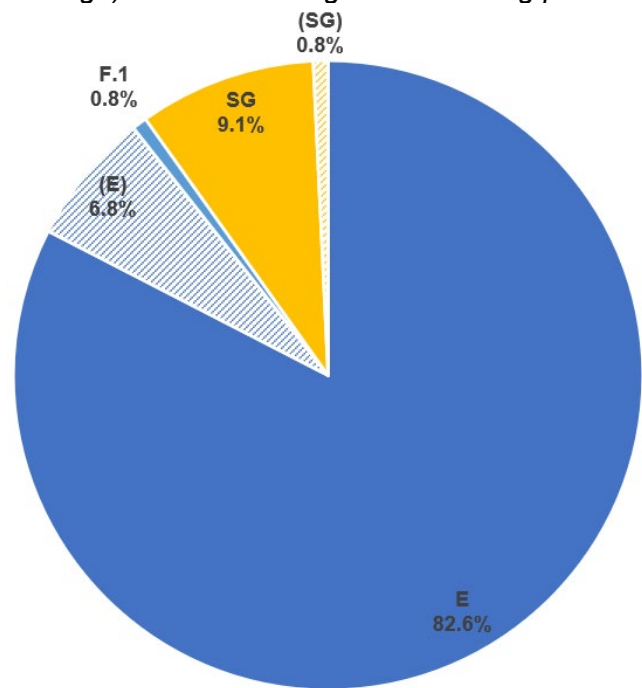
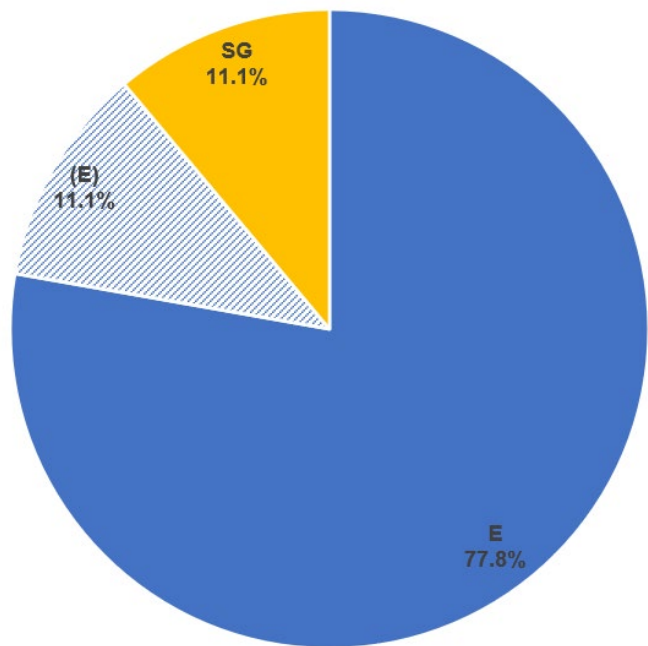


Figure 5 Vitality (Secondary Frontage) in Redhill during the monitoring period



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 6.9% 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	62 (39.0%)	20,688sqm (44.7%)
Convenience	11 (6.9%)	15,248sqm (33.9%)
Food and drink	18 (11.3%)	2,796sqm (6.0%)
Non-retail	7 (4.4%)	224sqm (0.5%)
Service	47 (29.6%)	4,484sqm (9.7%)
Vacant	13 (8.2%)	2,292sqm (4.9%)
Total	159 (100.0%)	46,318sqm (100.0%)

Development and Use Class Changes

Within this monitoring period the following permissions were completed:

- 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 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
- 20/02733/P: Aquila Group Holdings Ltd, First Floor, Aquila House, 35 London Road: Change of use from B1(a) to C3 for 45 residential units

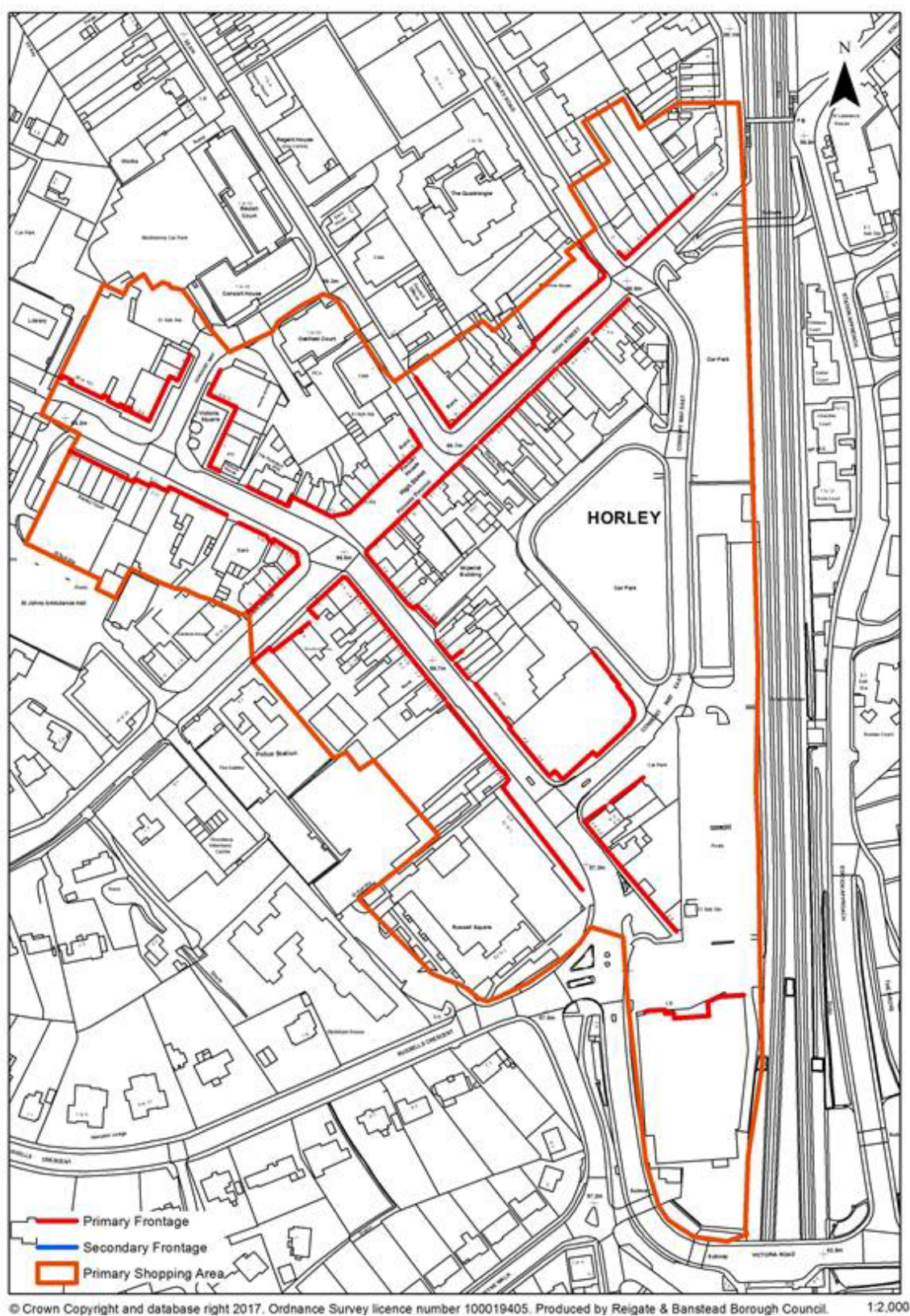
The following permissions are extant:

- 18/01857/F: The Abbot Public House, 14 Station Road: Change of use from A4 to SG
- 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

- 21/01159/P: Abbey House, 25 Clarendon Road: Change of use B1(a) to C3 for 23 residential units
- 21/03049/F: 2-4 High Street: Conversion of rear of first floor into two flats
- 22/00072/P: 2-4 High Street: Conversion of A2 to C3

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

2.4. Horley Town Centre



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 and New Occupiers

Within this monitoring period, five 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. Horley town centre has the greatest proportion of vacant units, frontage and net retail floorspace of all the town centres in the borough. When comparing the vacancy rates to the previous monitoring period, the percentage of vacant units have stayed the same, whilst the percentage of vacant frontage has slightly increased, and the percentage of net retail floorspace has increased. The vacancy rate in Horley in comparison to the last monitoring period is as follows:

- Percentage of vacant units: 9.6% to 9.6%
- Percentage of vacant frontage: 12.5% to 12.3%
- Percentage of vacant net retail floorspace: 5.9% to 7.1%

Table 8 Vacancy rates in Horley during the monitoring period

Indicator	Vacancy Rate
Percentage of units	9.6%
Percentage of frontage	12.3%
Percentage of net retail floorspace	7.1%

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

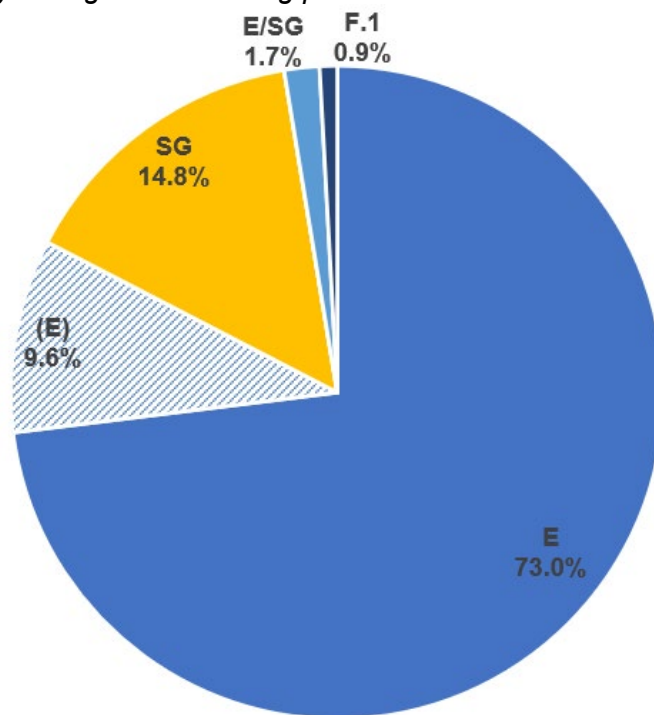


Table 9 below shows that the greatest proportion of units are occupied by services (33.9%). Although comparison retail only accounts for the third highest percentage of units, it accounts for the greatest proportion of retail floorspace in Horley (28.8%).

Table 9 Retail offer in Horley during the monitoring period

Offer	Units	Net Floorspace
Comparison	21 (18.3%)	5,542sqm (28.8%)
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	39 (33.9%)	2,681sqm (13.0%)
Vacant	11 (9.6%)	1,361sqm (7.1%)
Total	115 (100.0%)	19,236sqm (100.0%)

Development and Use Class Changes

The following planning permissions have been completed within this monitoring period:

- 18/00320/P: Ground Floor 83 Victoria Road: Change of use from A1 to C3
- 19/00597/F: 7 High Street: 19sqm retail extension
- 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

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)
- 20/00867/P: Rear of 11-15 High Street: Change of use A2 to C3
- 20/02823/P: Victoria House, Consort Way: Change of use from B1(a) to C3
- 21/00501/F: Middleton House, 43-49 High Street: Three storey rear extension to provide ten flats
- 21/00695/F: Lloyds, 96 Victoria Road: Division of existing two residential flats to four residential flats

- 21/01784/CU: The Stapley Building, 24B High Street: Change of use from A1 to SG (Hot-food takeaway)
- 21/01915/P: Rear of The Horley Laundrette, 45 High Street: Change of use SG to C3
- 21/01916/P: Rear of Cooks Electrical, 47 High Street: Change of use E (formerly A1) to C3
- 21/01917/P: Rear of Furnishing Flair, 49 High Street: Change of use E (formerly A1) to C3

The following permissions are extant:

- 20/00414/F: 14-16 Massetts Road: First and new second floor extension to provide eight residential units
- 20/02095/P: Hereford House, 7-9 Massetts Road: 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

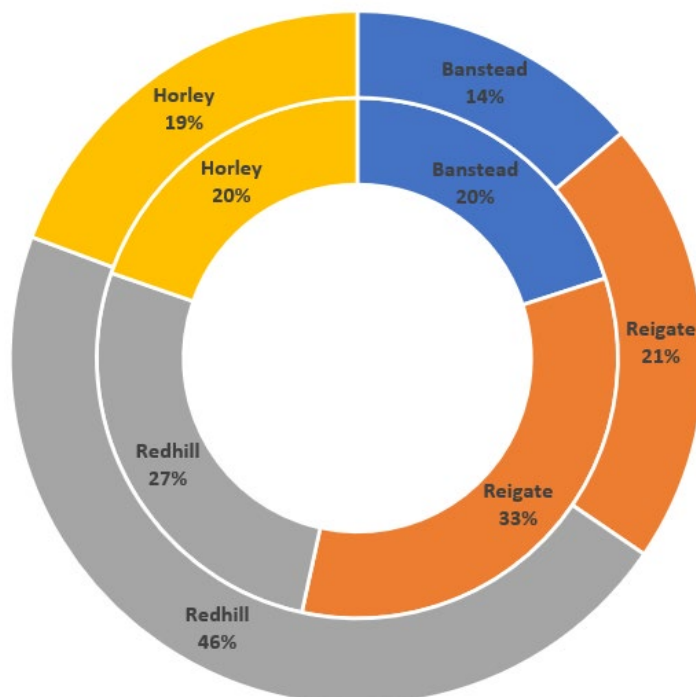
This chapter brings together the individual analysis of the town centres.

3.1. Town Centre Composition

Cumulatively, the borough's town centres provide 586 units, 100,080sqm retail floorspace and 5,540m 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%); though 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. Redhill also has the Belfry Shopping Centre which provides larger format stores, including department stores such as Marks and Spencer's.

Figure 7 – Distribution of town centre retail units and floorspace (units inner, floorspace outer)



3.2. Vacancy Trend

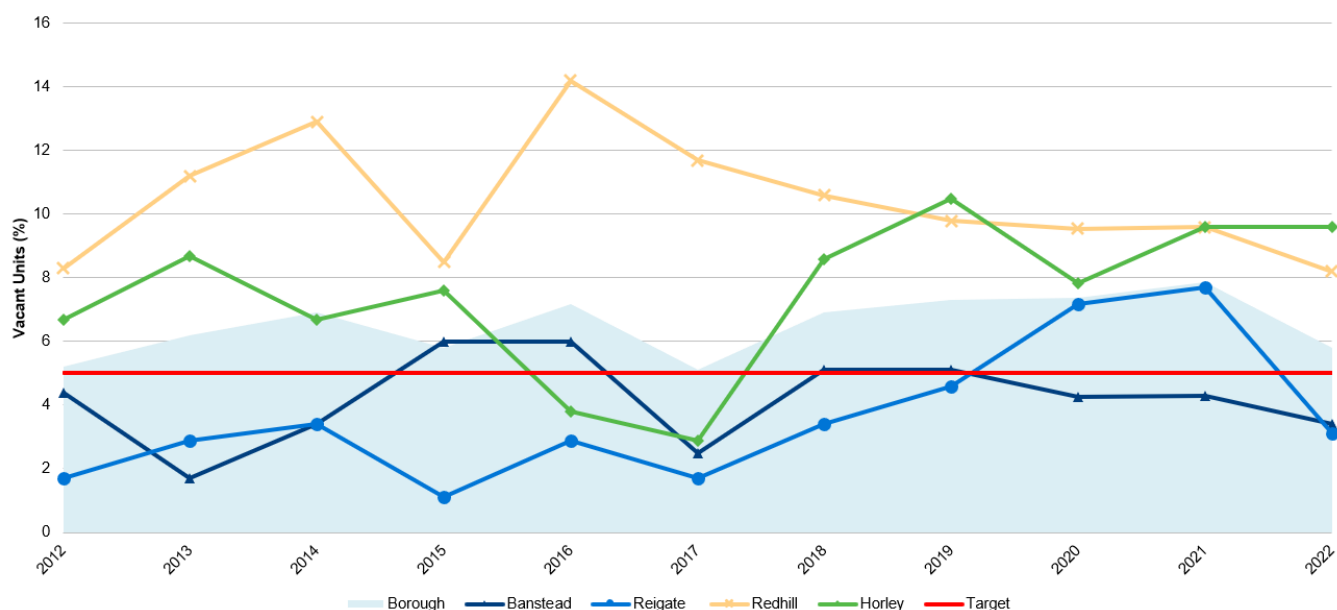
Table 10 below shows that overall, there are 34 vacant units. This is a decrease of 12 units from the previous monitoring period. The greatest number of vacant units are in Redhill, closely followed by Horley. Compared to the previous monitoring period, all the town centres have seen a decrease in the number of vacant units, excluding Horley, which has the same number of 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	4
Reigate	6
Redhill	13
Horley	11

The graph in Figure 8 below shows that Reigate and Banstead are the two town centres to have a vacancy rate below the Core Strategy Monitoring Framework target of 5.0% (3.1% and 3.4% respectively). Horley has the highest vacancy rates in the borough (9.6%), followed by Redhill (8.2%). This, however, still compares favourably to the national vacancy rate for high streets from the first quarter of 2022 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, Banstead and Redhill have all decreased, whilst Horley has stayed the same. The overall borough-wide percentage of vacant units has also decreased from the previous monitoring period, from 7.9% to 5.8%.

Figure 8: Trend of vacant unit percentage in Reigate and Banstead Borough Council from 2012-2022 (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 (12.3%), whilst Banstead has the least (2.5%). All vacant units within the town centres are scattered throughout the centres. Overall, 6.4% of all of the town centres frontage is vacant, which is lower compared to the previous monitoring period (7.8%).

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

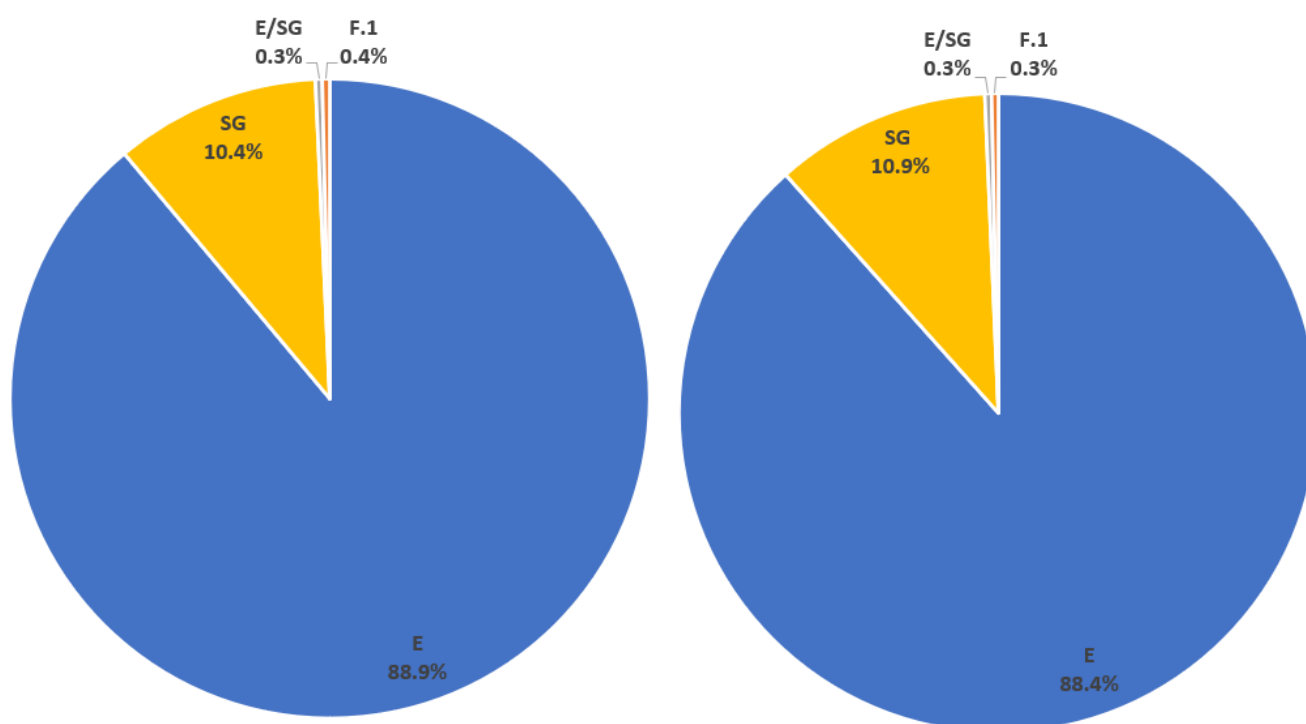
Type	Vacancy Rate
Banstead	2.5%
Reigate	3.2%
Redhill	7.8%
Horley	12.3%

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 approximately 88.9% 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 (32.3%) and total floorspace in all four town centres in the borough (35.7%). Services offers the second greatest number of units within all four town centres (31.9%). However, convenience retail occupies the second greatest amount of floorspace in all the town centres

(31.1%), although only 7.8% 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 and the Morrisons in Reigate. 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 (32.3%)	35,736sqm (35.7%)
Convenience	46 (7.8%)	31,133sqm (31.1%)
Food and drink	109 (18.6%)	13,302sqm (13.3%)
Non-retail	20 (3.4%)	1,558sqm (1.6%)
Service	187 (31.9%)	13,238sqm (13.2%)
Vacant	34 (5.8%)	4,527sqm (4.5%)
Total	586	100,080sqm

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 comparison retail (28.8%, 44.7% and 33.6% respectively), whilst the highest percentage of retail floorspace in Banstead is convenience retail (38.9%).

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

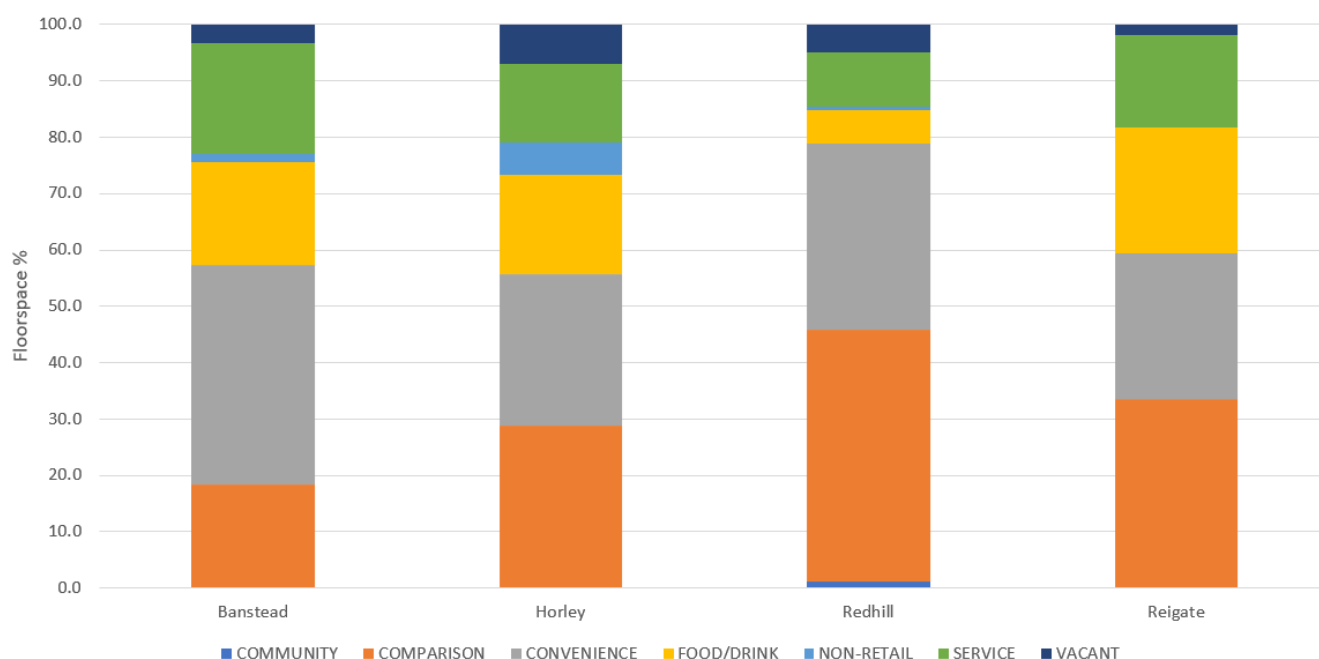
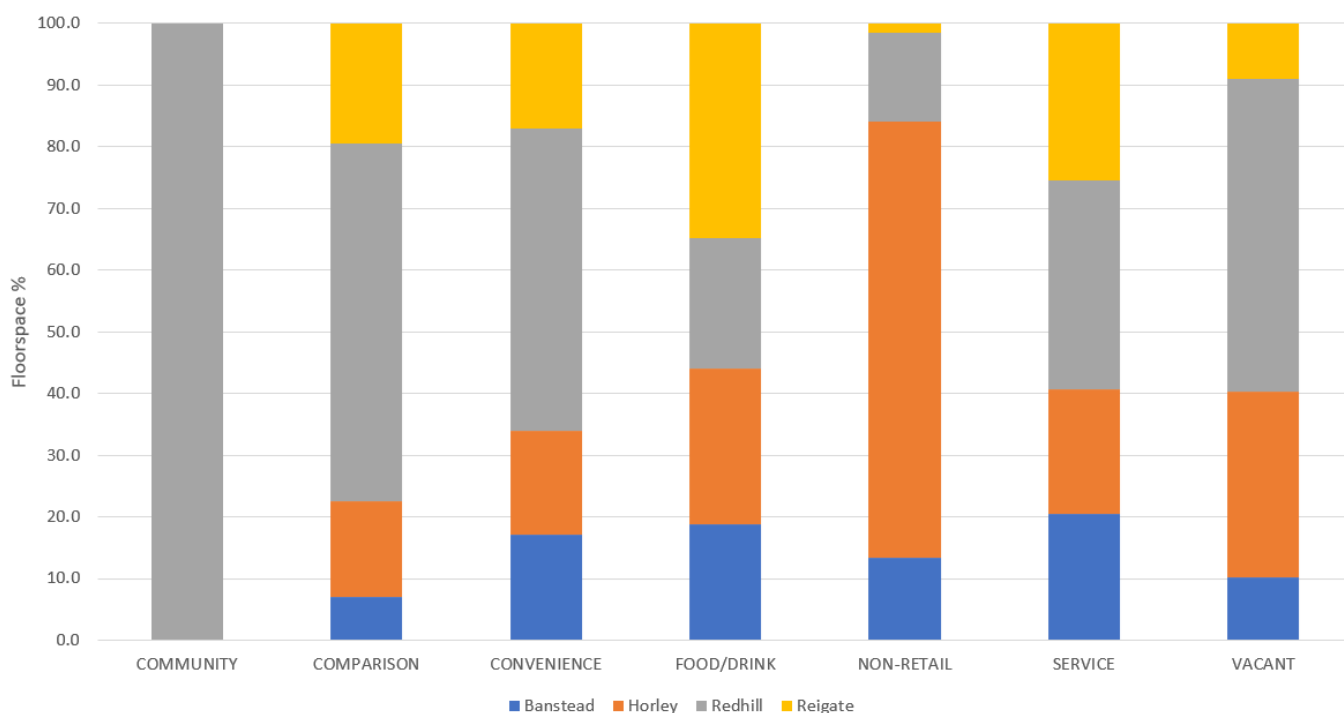


Figure 11 below shows the retail offer of floorspace within the town centres. It shows that Redhill town centre has the greatest proportion of comparison, convenience, community, service accommodation and vacant floorspace. Reigate town centre has the greatest proportion of floorspace for food and drink offer. 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. Categoricalised 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 and Reigate 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 overall, and this is also the case in Banstead and Reigate (9 and 29 units respectively). The most common comparison retail offer in Redhill is other comparison retail (23 units), and for Horley, the most common comparison retail offer are charity and second hand stores. Food and supermarkets are the most common convenience retail offer overall, and this is also the case in all four town centres. Cafes and sandwich bars are the most common food and drink establishments overall with 39 units. Restaurants are the most common food and drink establishments in Banstead and Reigate (11 and 16 units respectively), whilst cafe and 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 54 units, and this is also the case in all town centres, except Horley. The most common services in Horley are the other services (11 units). Hair and beauty services are the most common service offer in Redhill, but this is held jointly with estate agents (both 10 units). Horley has the most non-retail units (9), whilst Redhill is the only town centre that has a community offer. Redhill has the greatest number of vacant units (13). Clothing, footwear and accessories, other comparison retail, 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 (3.1%)	0 (0.0%)	11 (1.9%)
Charity/Second hand	8 (6.8%)	6 (3.1%)	6 (3.8%)	7 (6.1%)	27 (4.6%)
Clothing, footwear and accessories	9 (7.7%)	29 (14.9%)	18 (11.3%)	6 (5.2%)	62 (10.6%)
Electronics and technology	0 (0.0%)	3 (1.5%)	8 (5.0%)	0 (0.0%)	11 (1.9%)
Home and DIY	8 (6.8%)	9 (4.6%)	2 (1.3%)	3 (2.6%)	22 (3.8%)
Other comparison retail (e.g. gifts, florists etc.)	4 (3.4%)	24 (12.3%)	23 (14.5%)	5 (4.3%)	56 (9.6%)
Total Comparison	30 (25.6%)	76 (39.0%)	62 (39.0%)	21 (18.3%)	189 (32.3%)

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	12 (10.3%)	6 (3.1%)	7 (4.4%)	5 (4.3%)	30 (5.1%)
Newsagents	1 (0.9%)	1 (0.5%)	1 (0.6%)	2 (1.7%)	5 (0.9%)
Total Convenience	17 (14.5%)	9 (4.6%)	11 (6.9%)	9 (7.8%)	46 (7.9%)

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%)	14 (7.2%)	9 (5.7%)	10 (8.7%)	39 (6.7%)
Pub/Bars	0 (0.0%)	9 (4.6%)	3 (1.9%)	3 (2.6%)	15 (2.6%)
Restaurant	11 (9.4%)	16 (8.2%)	5 (3.1%)	6 (5.2%)	38 (6.5%)
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%)	43 (22.1%)	18 (11.3%)	26 (22.6%)	109 (18.6%)

Table 16 Detailed breakdown of services (units)

Type of Retail Offer	Banstead	Reigate	Redhill	Horley	Total
Banking	2 (1.7%)	3 (1.5%)	9 (5.7%)	1 (0.9%)	15 (2.6%)
Bookmakers	2 (1.7%)	1 (0.5%)	2 (1.3%)	2 (1.7%)	7 (1.2%)
Dentist	2 (1.7%)	1 (0.5%)	0 (0.0%)	0 (0.0%)	3 (0.5%)
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 (6.3%)	9 (7.8%)	39 (6.7%)
Hair and beauty	14 (12.0%)	20 (10.3%)	10 (6.3%)	10 (8.7%)	54 (9.2%)
Opticians	5 (4.3%)	5 (2.6%)	5 (3.1%)	3 (2.6%)	18 (3.1%)
Other services (e.g. employment, repairs etc.)	9 (7.7%)	10 (5.1%)	8 (5.0%)	11 (9.6%)	38 (6.5%)
Travel agents	0 (0.0%)	2 (1.0%)	1 (0.6%)	0 (0.0%)	3 (0.5%)
Total Services	43 (36.8%)	58 (29.7%)	47 (29.6%)	39 (33.9%)	187 (31.9%)

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 (4.4%)	9 (7.8%)	20 (3.4%)
Community	0 (0.0%)	0 (0.0%)	1 (0.6%)	0 (0.0%)	1 (0.2%)
Vacant	4 (3.4%)	6 (3.1%)	13 (8.2%)	11 (9.6%)	34 (5.8%)
Total Other	5 (4.3%)	9 (4.6%)	21 (13.2%)	20 (17.4%)	55 (9.4%)

3.6. Future Trends

The retail industry has continued to change significantly due to the impact of the Covid-19 pandemic and more recently, rising inflation and growing cost-of-living contributed to by the Russian invasion of Ukraine. The war in Ukraine has sharply increased gas and oil prices, which has affected businesses and consumers worldwide, which has resulted in them increasing their prices for their customers. China's ability to supply the world with consumer goods and raw materials has also been, and still is, strongly affected by the impacts of Covid, resulting in many businesses struggling to supply goods received from China to their consumers. There is also a significant wage inflation within retail and the rest of the economy due to the shortages of skilled and semi-skilled workers caused by migrants returning to their home countries during the lockdowns and stricter entry conditions into the UK post-Brexit. All these factors also suggest that price inflation will rise further, hinting that retail may suffer more throughout the year.

A gradual return to stores is expected to increase during the year, but due to the increased popularity of online retail and ecommerce during the pandemic, visitor numbers are still unlikely to return to pre-pandemic levels, with the [Retail Gazette](#) predicting that footfall is still expected to be at least 10% lower than the pre-Covid level. This will only be further exacerbated as inflation increases throughout the year and the cost of living continues to increase, leaving many with less disposable income. A study by [Research Without Barriers on behalf of VoucherCodes](#) found that the average person has £124 less disposable income each month compared to before the cost-of-living crisis, which equates to £1,488 over the year. Householders are instead having to use more money predominantly on electricity bills, gas bills and fuel. In some cases, disposable income has shrunk to such an extent that the same survey found that consumers now class ordering a takeaway as much of a luxury as travelling abroad.

Before the issues that arose from the growing cost-of-living crisis, [Retail Economics](#) predicted that the retail sales would rise by 2.0% in 2022 under standard conditions. Although there is an increase, this is down from the previous year, and still below pre-Covid levels in 2019. However, considering the recent circumstances, it is much harder to predict the overall outcome of the retail industry.

The first few months of 2022 saw a fall in sales volumes for many of the retail sectors. The [ONS](#) found that food store sales volumes fell by 1.1%. This may be due to higher spending in pubs and restaurants due to reduced Covid restrictions and rising food prices. Automotive fuel sales volume also fell by 3.8%, potentially due to the reduced non-essential road travel caused by high fuel prices. However, non-food store sales volumes did rise by 1.3%, partly due to the increased popularity of household goods stores, such as DIY stores.

A study conducted by [Square with support from Wakefield Research](#) found 8 big trends for the retail industry in 2022:

- Selling online is non-negotiable
- Omnichannel tools create more meaningful shopping experiences
- Automated technology helps retailers manage the labour shortage
- Same-day delivery gives retailers a clear advantage
- Social commerce is one of the biggest digital trends in the retail industry

- Interactive retail experiences bridge the gap between online and offline parts of the store
- The borders between retail and other industries continue to blur
- Community investments from retailers may be here to stay

The UK economy had been growing quickly from the Covid-19 pandemic, helped by a permissive national policy that a rapid economic growth was needed to put the UK economy back on course and to eventually pay down some of the borrowings required to sustain households and businesses during the height of the pandemic. However, how the economy evolves from this is largely dependent on what occurs internationally. On the basis that these issues remain unchanged, there is an expectancy that there would be a retail sales growth of zero in real terms ([Square and Wakefield Research](#)).

How Reigate and Banstead Borough Council handles these changes in future trends of town centres remains to be seen. Further influences outside of the borough, such as the impact on town centres from developments at Gatwick Airport, also adds to the uncertainty of how town centres will react to any changes. The Council will continue to monitor these changes on the town centres.

Appendix 1

Use Class before 1 st 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 1 st 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)