



Town Centre Monitor

April 2024

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Please Note:

The information contained within this monitor details data from town centres in Reigate and Banstead during the period April 2023 to March 2024.

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

Reigate and Banstead 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 2023 to March 2024, with survey work undertaken in April 2024. During this monitoring period, town centres have continued to be impacted by, and have responded to, the impact of the cost of living and Russia's invasion of Ukraine. The second half of this monitoring period coincided with gradual increases in inflation, meaning businesses had to adapt to changes in the economic market.

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 2024 and found not needing updating) and the Development Management Plan (DMP) (adopted 2019). 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

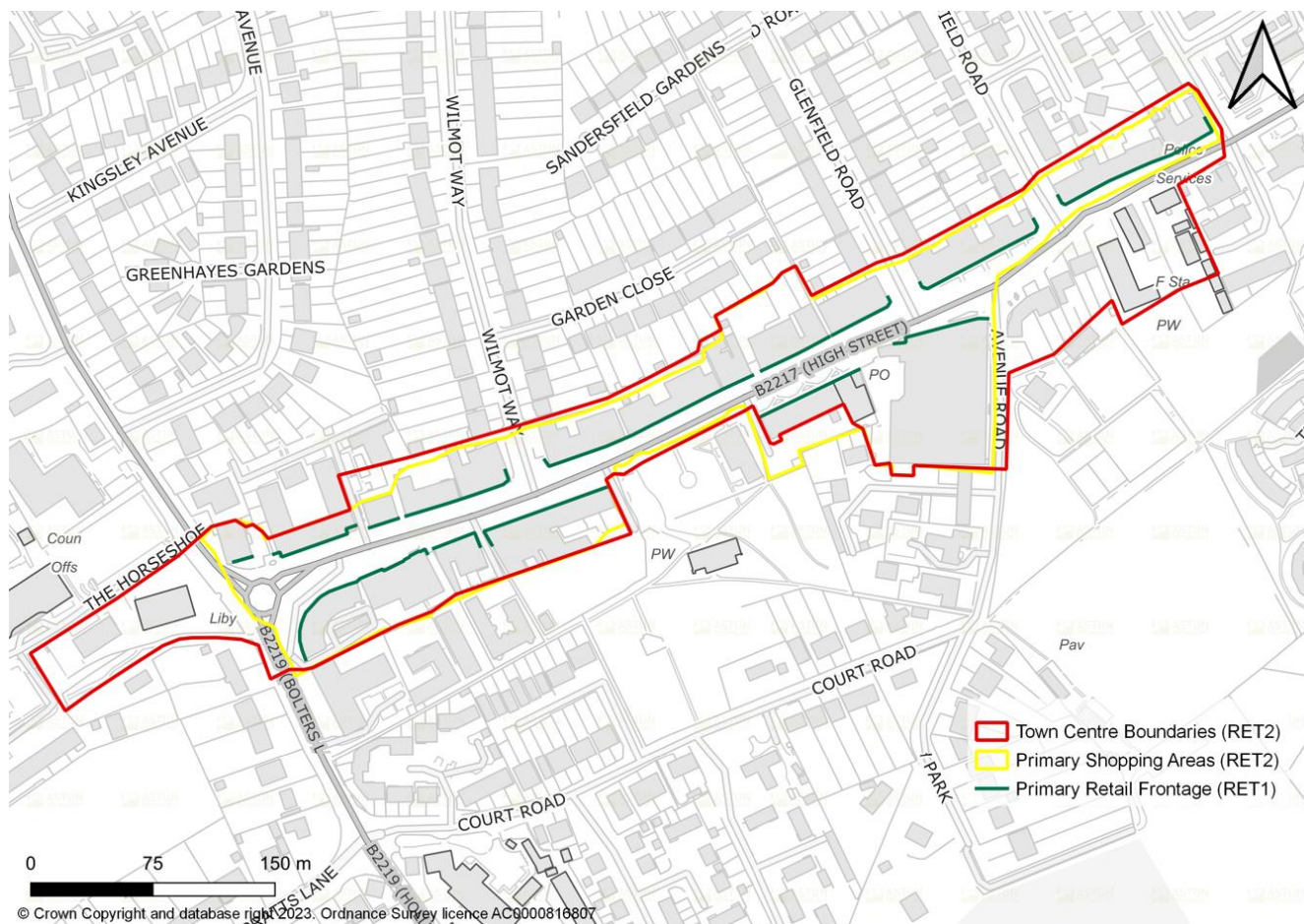
In order to protect and enhance the vitality and viability of the borough's town centres and ensure that they continue to meet resident and visitor demand, it is important that an appropriate mix of uses is maintained. A key objective of DMP Policy RET2 'Town Centre

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

Please note that the 'Development and Use Classes' sections within each town centre appraisal 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, four new occupiers have moved into the village, whilst five occupiers have left the village.

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

- Percentage of vacant units: 3.4% to 5.1%
- Percentage of vacant frontage: 4.1% to 5.2%.
- Percentage of vacant net retail floorspace: 3.8% to 5.1%.

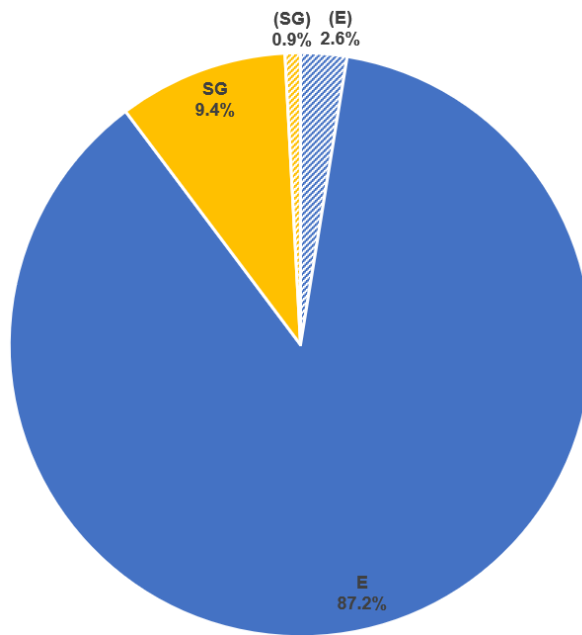
Table 2 Vacancy rates in Banstead during the monitoring period

Indicator	Vacancy Rate
Percentage of units	5.1%
Percentage of frontage	5.2%
Percentage of net retail floorspace	5.1%

Viability

Figure 1 below shows that E Use Class accounts for 89.8% of the units within the centre. This includes units within the E Use Class that are currently vacant (E) and shown as shaded. The remaining 10.3% 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 village and convenience retail occupies the greatest proportion of floorspace. Comparison retail occupies the second greatest proportion of units, whilst services occupy the second greatest proportion of floorspace.

Table 3 Retail offer in Banstead during the monitoring period

Offer	Units	Net Floorspace
Comparison	28 (23.9%)	2,358sqm (17.1%)
Convenience	15 (12.8%)	5,223sqm (37.8%)
Food and drink	23 (19.7%)	2,645sqm (19.1%)
Non-retail	1 (0.9%)	210sqm (1.5%)
Service	44 (37.6%)	2,675sqm (19.4%)
Vacant	6 (5.1%)	706sqm (5.1%)
Total	117 (100.0%)	13,816sqm (100.0%)

Development and Use Class Changes

Within this monitoring period, the following permissions were completed:

- Prior Approval 22/01563/PAP: 12A High Street: Conversion of first and second floors from E to C3

The following permissions are under construction:

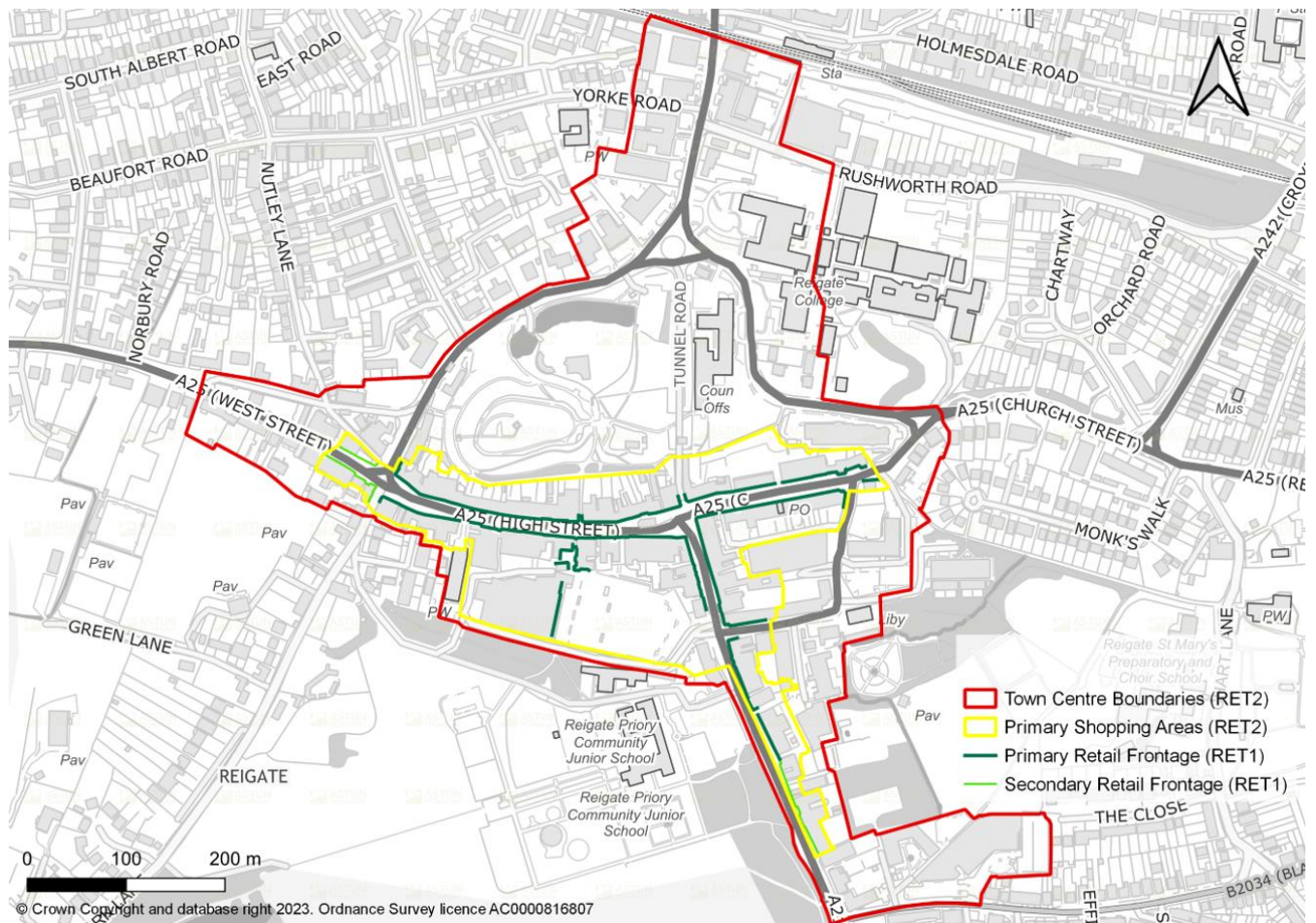
- Planning Permission 18/01984/F: 41 High Street: Single storey rear extension to increase A1 floorspace by 11sqm
- Planning Permission 21/01507/F: 133A High Street: Change of use of upper floors from D1 to C3
- Planning Permission 23/01712/CU: 138 High Street: Change of use of ground floor from C3 to E

The following permissions are extant:

- Prior Approval 23/02632/PAP: 38 High Street: Change of use of first and second floors from E to C3

Note: the permissions refer to the use classes at the time of when the 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. 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 15 occupiers have left the town centre. There are currently 11 vacant units within the town centre. This accounts for 5.6% of the units, 5.2% of the frontage and 4.4% of the floorspace within the town centre. Compared to the last monitoring period, there has been a slight decrease in the percentage of vacant frontage, whilst there has been a slight increase the percentage of vacant floorspace. The percentage of vacant units has stayed the same.

- Percentage of vacant units: 5.6% to 5.6%
- Percentage of vacant frontage: 5.7% to 5.2%
- Percentage of vacant net retail floorspace: 4.2% to 4.4%

Table 4 Vacancy rates in Reigate during the monitoring period

Indicator	Vacancy Rate
Percentage of units	5.6%
Percentage of frontage	5.2%
Percentage of net retail floorspace	4.4%

Viability

Figure 2 below shows that E Use Class accounts for 90.4% of the units within the primary frontage, whilst for secondary frontage, Figure 3 shows that 88.3% 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 11.7% in secondary frontages.

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

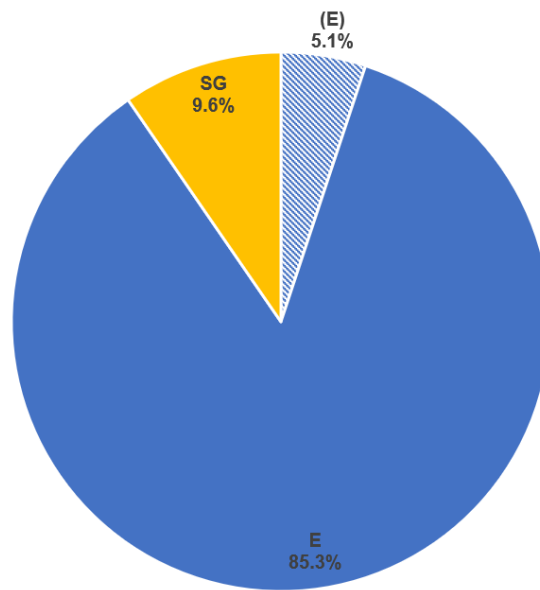
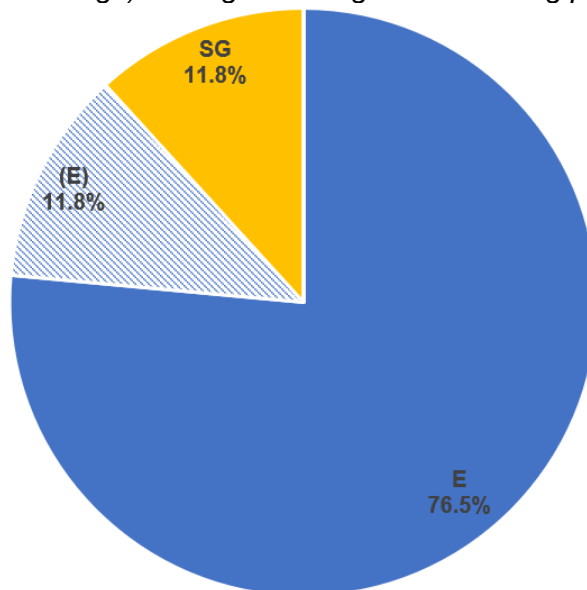


Figure 3 Vitality (Secondary Frontage) in Reigate during the monitoring period



As can be seen in Table 5 below, the greatest proportion of units and floorspace within Reigate town centre is occupied by comparison retail (37.4% and 32.5% 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; 22.3% floorspace).

Table 5 Retail offer in Reigate during the monitoring period

Offer	Units	Net Floorspace
Comparison	73 (37.4%)	6,737sqm (32.5%)
Convenience	9 (4.6%)	5,326sqm (25.7%)
Food and drink	43 (22.1%)	4,628sqm (22.3%)
Non-retail	4 (2.1%)	24sqm (0.1%)
Service	55 (28.2%)	3,082sqm (14.9%)
Vacant	11 (5.6%)	913sqm (4.4%)
Total	195 (100.0%)	20,709sqm (100.0%)

Development and Use Class Changes

Within this monitoring period, the following permissions were completed:

- Prior Approval 21/02082/PAP: Just Retirement, Vale House, Roebuck Close: Change of use B1(a) to C3
- Planning Permission 21/02120/CU: 21-23 High Street: Change of use from A2 to A1 and development of two flats
- Prior Approval 21/02679/PAP: Integration UK Ltd, Westcroft, 16 West Street: Conversion of offices (B1(a)) to 11 apartments (C3)
- Planning Permission 22/01045/F: Chalk Hills Bakery, 75 Bell Street: Change of use B1(a) to C3 (10 dwellings)

The following permissions are under construction:

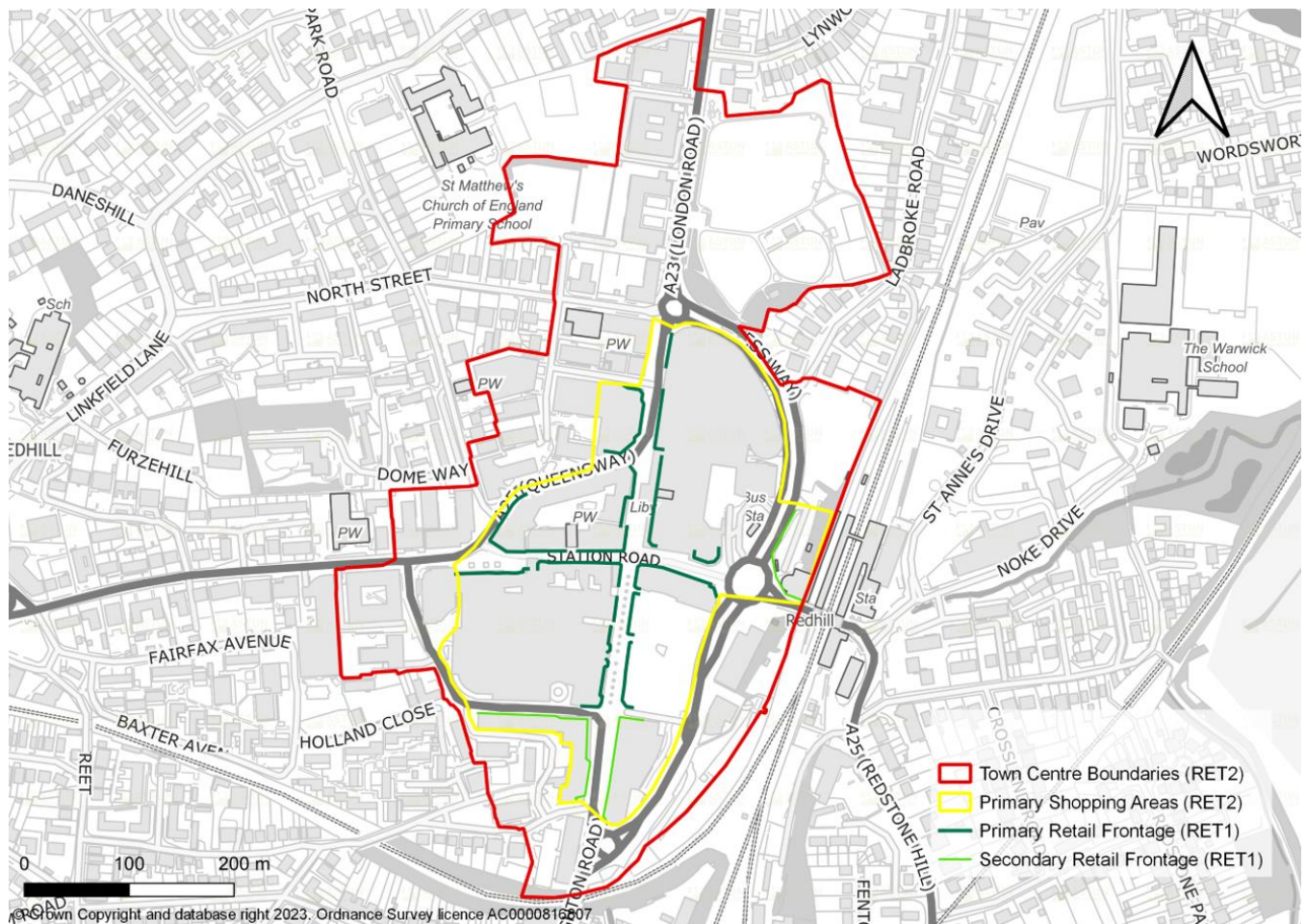
- Planning Permission 19/00715/F: Rear of 4-10 Church Street: Loss of 54sqm A2 and provision of C3 accommodation
- Prior Approval 21/02800/PAP: Roebuck House, Bancroft Lane: Change of use B1(a) to C3

The following permissions are extant:

- Planning Permission 20/00572/F: 1 Church Street (upper floors): Conversion of existing B1(a) and D2 uses to C3
- Prior Approval 20/00978/PAP: 7-11 High Street (upper floors): Change of use B1(a) to C3
- Prior Approval 21/01323/PAP: 5a, 7a, 9a, 11a and 13a West Street: Development of 14 new flats
- Planning Permission 21/02974/F: Brookworth House, 99 Bell Street: Addition of third floor E uses

Note: the permissions refer to the use classes at the time of when the 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 recently been completed, including the residential redevelopment of the Former Liquid and Envy site and the mixed-use retail, the

residential redevelopment on Cromwell Road and 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

Within this monitoring period, 11 new occupiers have moved into the town centre, whilst eight occupiers have left the town centre.

There are currently 26 vacant units within the town centre, which is the greatest number of vacant units of all the town centres in the borough. However, this number includes the newly built units as part of the development at The Rise, Marketfield Way, which at the time of this monitor, only three of these units had been occupied. 14.1% of the frontage within the town centre and 9.6% 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: 16.7% to 15.5%
- Percentage of frontage: 18.3% to 14.1%
- Percentage of net retail floorspace: 12.3% to 9.6%

Table 6 Vacancy rates in Redhill during the monitoring period

Indicator	Vacancy Rate
Percentage of units	15.5%
Percentage of frontage	14.1%
Percentage of net retail floorspace	9.6%

Viability

Figure 4 below shows that the E Use Class accounts for 89.9% 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). 9.3% 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 0.7% of primary frontages are within the F.1 Use Class.

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

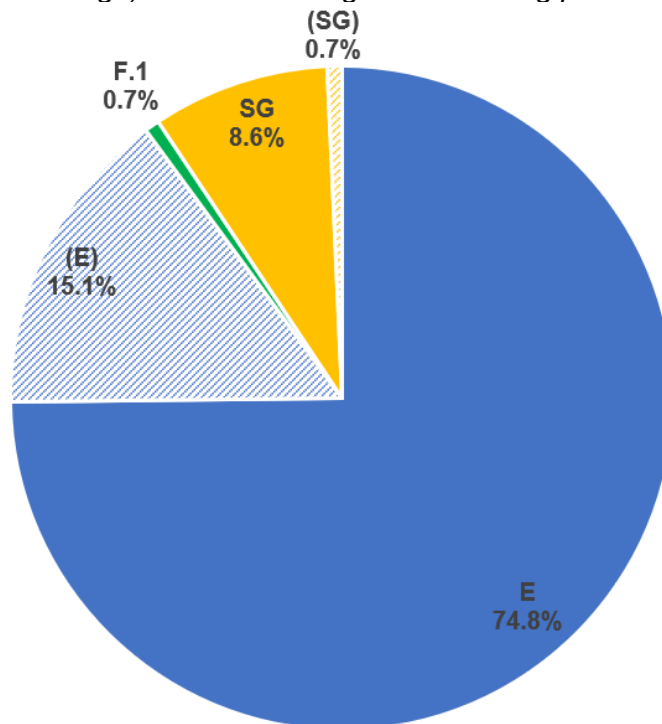
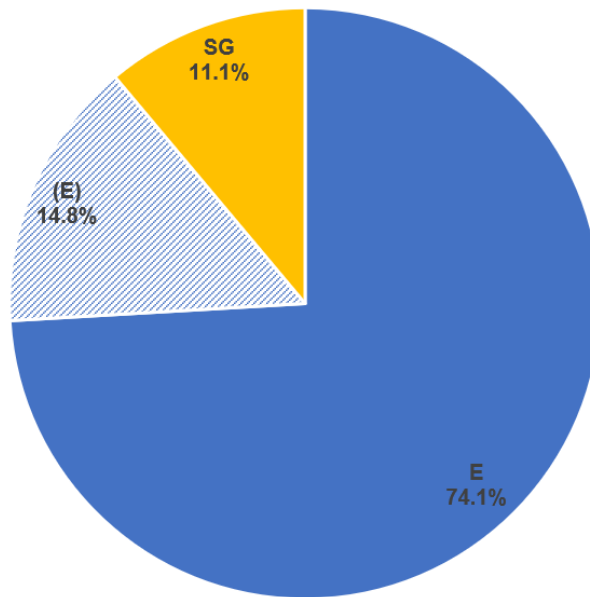


Figure 5 Vitality (Secondary Frontage) in Redhill during the monitoring period



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 7.1% 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 (1.2%)
Comparison	53 (31.5%)	19,578sqm (38.9%)
Convenience	12 (7.1%)	15,595sqm (31.0%)
Food and drink	22 (13.1%)	3,992sqm (7.9%)
Non-retail	8 (4.8%)	248sqm (0.5%)
Service	46 (27.4%)	5,431sqm (9.6%)
Vacant	26 (15.5%)	4,843sqm (9.6%)
Total	168 (100.0%)	50,274sqm (100.0%)

Development and Use Class Changes

Within this monitoring period the following permissions were completed:

- Planning Permission 16/01066/F: Marketfield Public Car Park, Marketfield Way: Redevelopment to form new residential and retail accommodation
- Prior Approval 17/02273/PAP: 36-38 Station Road: Change of use from A2 to C3
- Planning Permission 17/03013/F: 36-38 Station Road (upper floors): Change of use from A1 and A2 to C3

The following permissions are under construction:

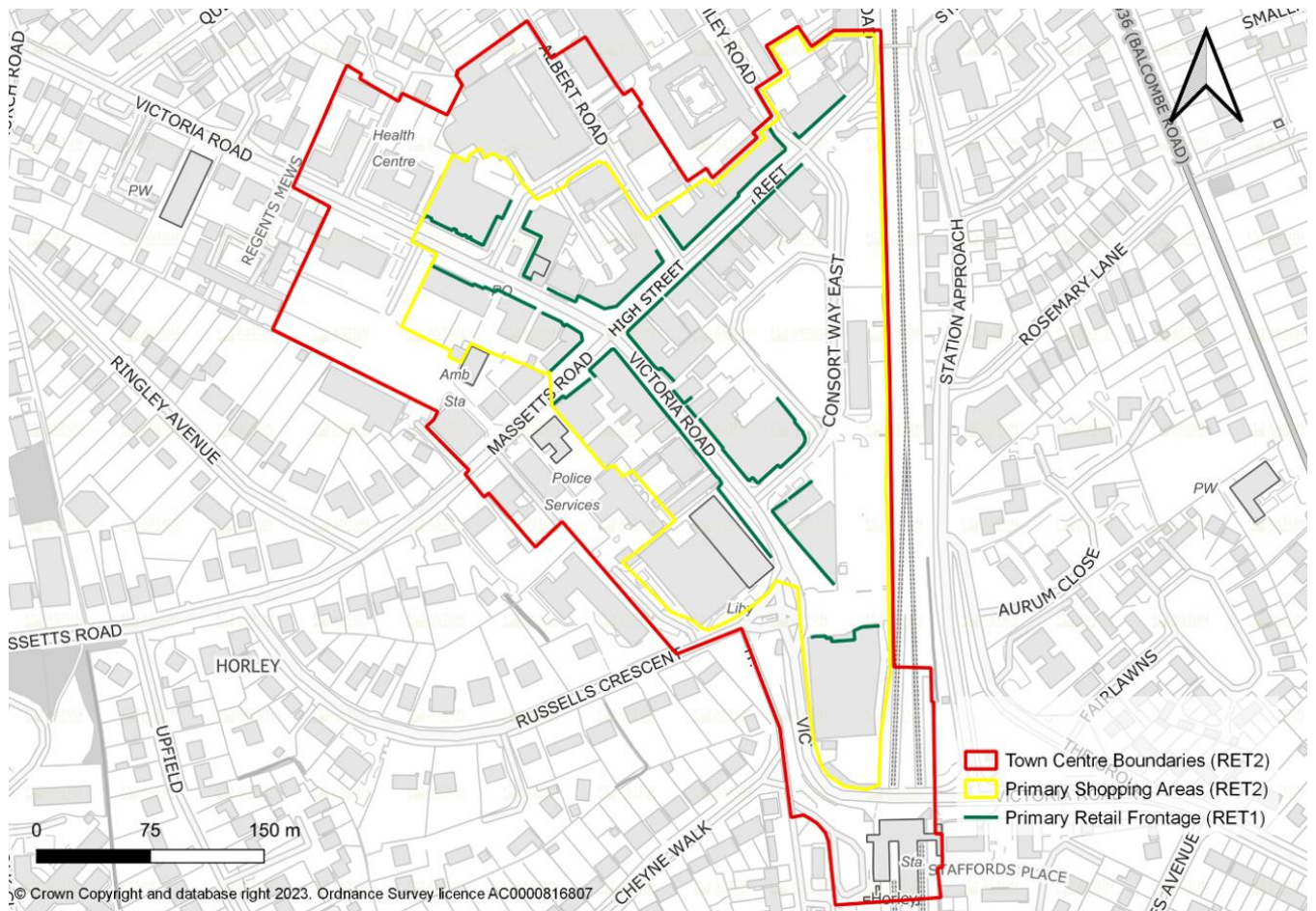
- Planning Permission 22/01930/F: 24 Station Road: Conversion and extension to provide 7 C3 dwellings

The following permissions are extant:

- Prior Approval 21/01159/PAP: Abbey House, 25 Clarendon Road: Change of use B1(a) to C3 for 23 residential units
- Planning Permission 21/03049/F: 2-4 High Street: Conversion of rear of first floor into two flats
- Prior Approval 22/00072/PAP: 2-4 High Street: Conversion of A2 to C3
- Planning Permission 23/02056/F: 33-35 Station Road: Conversion of first, second and loft floors from E to 4 C3 dwellings
- Prior Approval 23/02318/PAP: Queensway House, 15 London Road: Change of use from E to 21 C3 dwellings

Note: the permissions refer to the use classes at the time of when the 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 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 of 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 (completed) and Horley North West (nearing completion) Sectors).

Vacancies and New Occupiers

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

There are currently nine vacant units within the town centre. When comparing the vacancy rates to the previous monitoring period, the percentage of vacant units has stayed the same, whilst the percentages for vacant frontage and net retail floorspace have both decreased. The vacancy rate in Horley in comparison to the last monitoring period is as follows:

- Percentage of vacant units: 7.8% to 7.8%
- Percentage of vacant frontage: 10.8% to 8.6%
- Percentage of vacant net retail floorspace: 5.4% to 4.6%

Table 8 Vacancy rates in Horley during the monitoring period

Indicator	Vacancy Rate
Percentage of units	7.8%
Percentage of frontage	8.6%
Percentage of net retail floorspace	4.6%

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

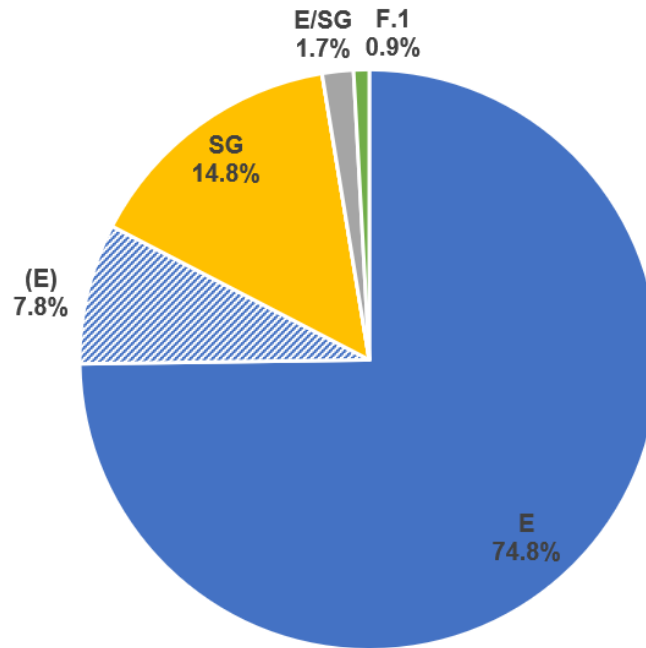


Table 9 below shows that the greatest proportion of units are occupied by services (36.5%). Although comparison retail only accounts for the third highest percentage of units, it accounts for the greatest proportion of net retail floorspace in Horley (29.2%).

Table 9 Retail offer in Horley during the monitoring period

Offer	Units	Net Floorspace
Comparison	20 (17.4%)	5,624sqm (29.2%)
Convenience	9 (7.8%)	5,189sqm (27.0%)
Food and drink	27 (23.5%)	3,505sqm (18.2%)
Non-retail	8 (7.0%)	947sqm (4.9%)
Service	42 (36.5%)	3,082sqm (16.0%)
Vacant	9 (7.8%)	889sqm (4.6%)
Total	115 (100.0%)	19,236sqm (100.0%)

Development and Use Class Changes

The following planning permissions were completed during this monitoring period:

- Prior Approval 20/02823/PAP: Victoria House, Consort Way: Change of use from B1(a) to C3

No permissions are under construction during this monitoring period.

The following permissions are extant:

- Planning Permission 20/00414/F: 14-16 Massetts Road: First and new second floor extension to provide eight residential units
- Planning Permission 21/01760/F: 77-81 Victoria Road: Conversion of first floor and addition of second storey to C3
- Planning Permission 21/01784/CU: The Stapley Building, 24B High Street: Change of use from A1 to SG (Hot-food takeaway)
- Prior Approval 22/02101/PAP: 86 Victoria Road: Change of use from E (formerly A1) to C3
- Planning Permission 22/02450/F: Saxley Court, 121-129 Victoria Road: Construction of a 6-storey building for C3 use
- Prior Approval 23/02037/PAP: Barclays Bank Plc, 105 Victoria Road: Change of use from E to 9 C3 dwellings

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

3. Overview and Summary

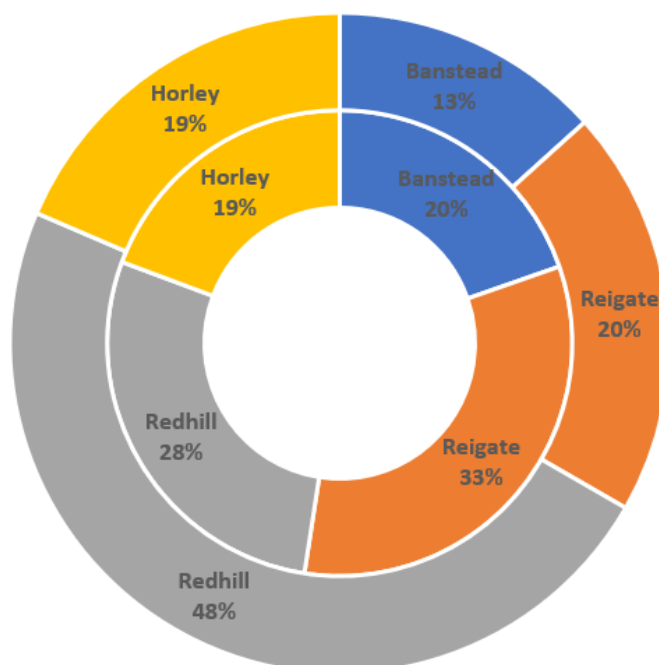
This chapter brings together the individual analysis of the town centres.

3.1. Town Centre Composition

Cumulatively, the borough's town centres provide 595 units, 104,036sqm of retail floorspace and 5,730m 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 (48%); though Reigate has the highest proportion of the town centre units (33%) followed by Redhill (28%). 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 52 vacant units, which is the same amount as the previous monitoring period. The greatest number of vacant units are in Redhill, followed

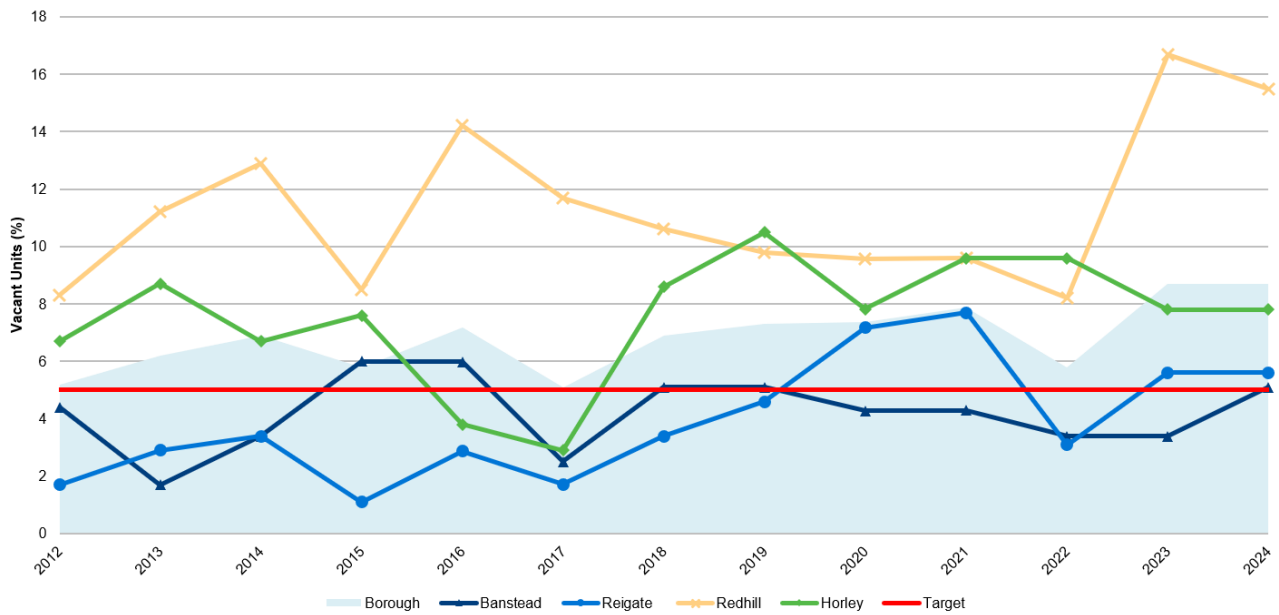
by Reigate. As already stated, the high number of vacant units in Redhill is largely due to the newly developed units as part of The Rise, Marketfield Way, development. Compared to the previous monitoring period, Banstead has seen an increase in the number of vacant units, whilst Redhill has seen a decrease in the number of vacant units. Reigate and Horley 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	6
Reigate	11
Redhill	26
Horley	9

The graph in Figure 8 below shows that none of the town centres in the borough has a vacancy rate below the Core Strategy Monitoring Framework target of 5.0%, although Banstead’s vacancy rate is only slightly higher than the target (5.1%). Redhill has the highest vacancy rates in the borough (15.5%, down from 16.7% in the previous monitoring period), followed by Horley (7.8%) and Reigate (5.6%). Apart from Redhill, these vacancy rates still compare favourably to the national vacancy rate for high streets from the final quarter of 2023 of 14.0%, according to the Local Data Company. Compared to the previous monitoring period, the vacancy rate of units in Banstead has increased, whilst Reigate and Horley has stayed the same, and Redhill has decreased. The overall borough-wide percentage of vacant units has also stayed the same from the previous monitoring period, at 8.7%.

Figure 8: Trend of vacant unit percentage in RBBC from 2012-2024 (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 Redhill has the greatest proportion of vacant frontage (14.1%), whilst Banstead has the least (5.1%). Apart from Banstead, all town centres have seen a decrease in percentage of vacant frontage compared to the previous monitoring period. All vacant units within the town centres are scattered throughout the centres, apart from at The Rise development in Redhill. Overall, 9.1% of all of the town centres frontage is vacant, which is lower compared to the previous monitoring period (11.0%).

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

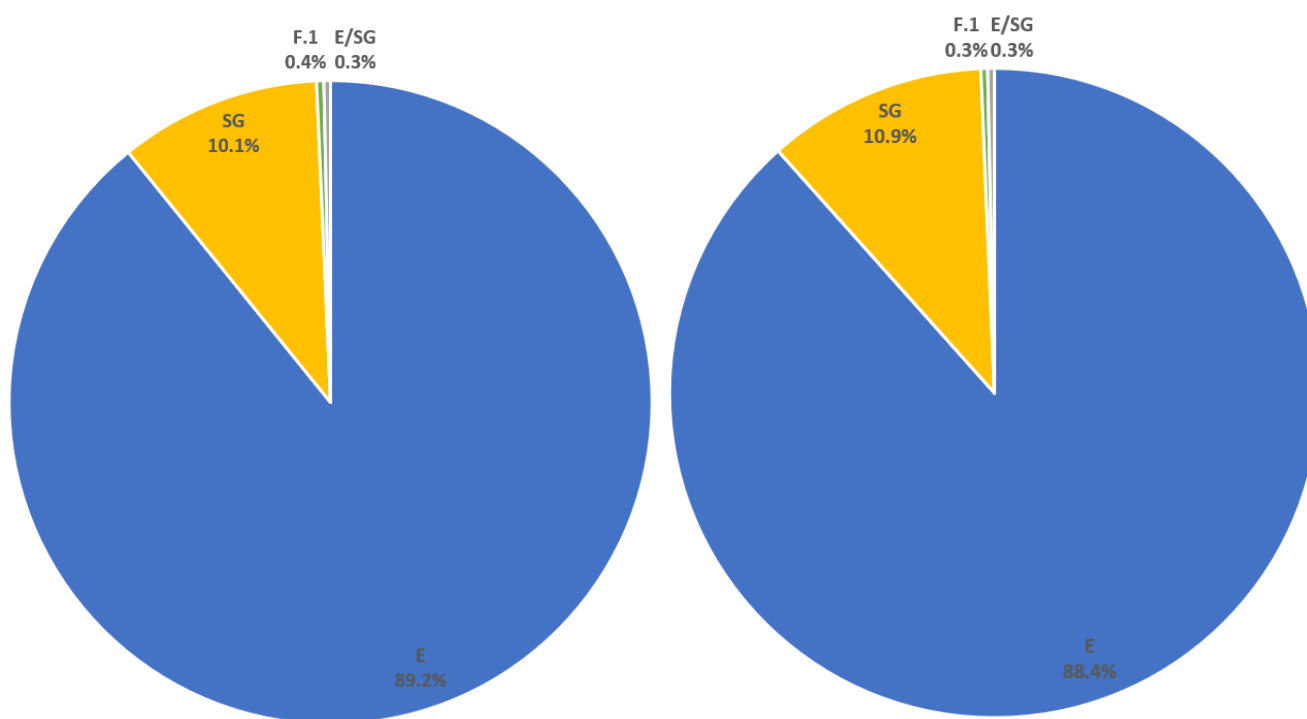
Type	Vacancy Rate
Banstead	5.1%
Reigate	5.2%
Redhill	14.1%
Horley	8.6%

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 89.2% and 88.4% of both the frontage length and number of units respectively within the town centres fall within E Use Class. SG units account for around 10-11% 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 services occupy the greatest number of units (31.4%) in all four town centres, whilst comparison retail occupies the most floorspace in all four town centres in the borough (33%). Comparison retail offers the second greatest number of units within all four town centres (29.2%). Convenience retail occupies the second greatest

amount of floorspace in all the town centres (30.1%), although only 7.6% 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	174 (29.2%)	34,298sqm (33.0%)
Convenience	45 (7.6%)	31,332sqm (30.1%)
Food and drink	115 (19.3%)	14,769sqm (14.2%)
Non-retail	21 (3.5%)	1,429sqm (1.4%)
Service	187 (31.4%)	14,270sqm (13.7%)
Vacant	52 (8.7%)	7,352sqm (7.0%)
Total	595	104,036sqm

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 are comparison retail (29.2%, 38.9% and 32.5% respectively), whilst the highest percentage of retail floorspace in Banstead is convenience retail (37.8%).

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

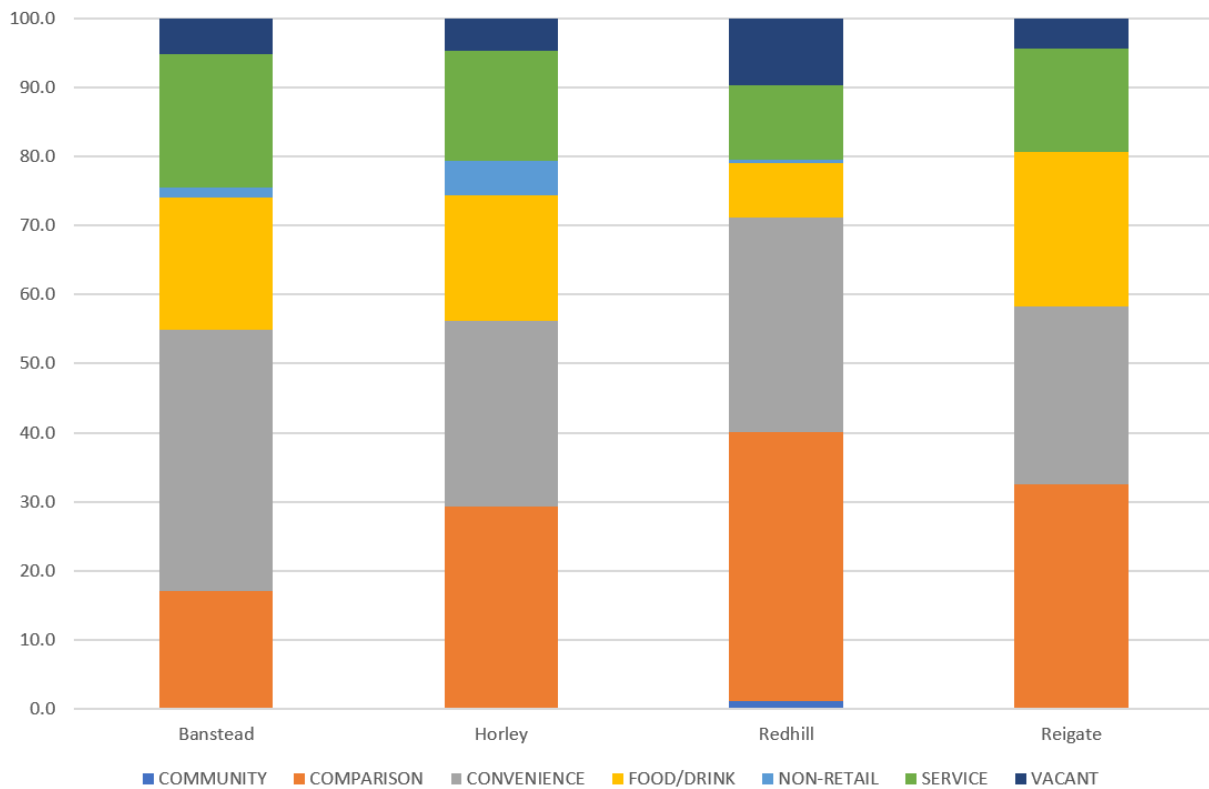
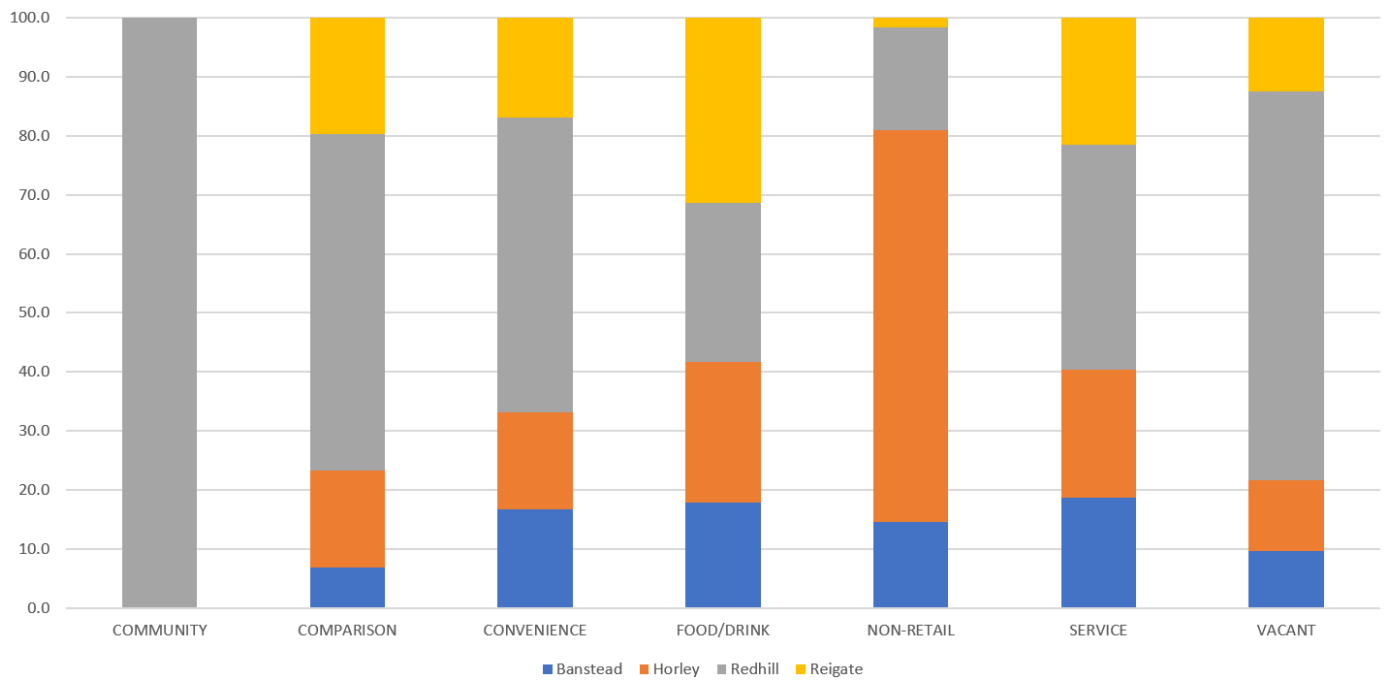


Figure 11 below shows the retail offer of floorspace within the town centres. It shows that Redhill town centre has the greatest proportion of comparison, convenience, community, service accommodation and vacant floorspace. Reigate town centre has the greatest proportion of floorspace for food and drink 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. Categorized Town Centre Offer

The following tables categorise the offer within the town centres. They show that the greatest proportion of comparison retail uses, food and drink establishments and services are within Reigate town centre, whilst the greatest proportion of convenience retail are located within Banstead.

Clothing, footwear and accessories and other comparison retail are the joint most common type of comparison retail overall. Other comparison retail is the most common type of comparison retail in Redhill and Horley (20 and 6 units respectively), whilst clothing, footwear and accessories is the most common type of comparison retail in Reigate and Banstead (27 and 8 units respectively). For Banstead, this is also joint with charity/second hand units). Food and supermarkets are the most common convenience retail offer overall, and this is also the case in all four town centres. Café and sandwich bars are the most common food and drink establishments overall with 44 units. Restaurants are the most common food and drink establishments in Banstead and Reigate (12 units), whilst café and sandwich bars are the most common food and drink establishments in Redhill and Horley (13 and 10 units respectively). For Reigate, restaurants and food and drink establishments are the joint most prevalent (15 units). Hair and beauty services are the most common service offer overall with 58 units, and this is also the case in all town centres, except Horley. The most common services in Horley are the other services, such as DIY and discount stores (13 units). Horley and Redhill have the joint most non-retail units (8), whilst Redhill is the only town centre that has a community offer. Redhill has the greatest number of vacant units (26). Hair and beauty, clothing, footwear and accessories, and other comparison retail and 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%)	4 (2.1%)	5 (3.0%)	0 (0.0%)	10 (1.7%)
Charity/Second hand	8 (6.8%)	6 (3.1%)	7 (4.2%)	5 (4.3%)	26 (4.4%)
Clothing, footwear and accessories	8 (6.9%)	27 (13.9%)	15 (8.9%)	4 (3.5%)	54 (9.1%)
Electronics and technology	0 (0.0%)	3 (1.5%)	5 (3.0%)	1 (0.9%)	9 (1.6%)
Home and DIY	7 (6.0%)	9 (4.6%)	1 (0.6%)	4 (3.5%)	21 (3.6%)
Other comparison retail (e.g. gifts, florists etc.)	4 (3.4%)	24 (12.3%)	20 (12.0%)	6 (5.2%)	54 (9.1%)
Total Comparison	28 (24.0%)	73 (37.4%)	51 (31.5%)	20 (17.4%)	174 (29.2%)

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 (1.8%)	2 (1.7%)	11 (1.9%)
Food/Supermarket	10 (8.6%)	6 (3.1%)	8 (4.8%)	6 (5.2%)	30 (5.0%)
Newsagents	1 (0.9%)	1 (0.5%)	1 (0.6%)	1 (0.9%)	4 (0.7%)
Total Convenience	15 (12.9%)	9 (4.6%)	12 (7.1%)	9 (7.8%)	45 (7.6%)

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%)	15 (7.7%)	13 (7.7%)	10 (8.7%)	44 (7.4%)
Pub/Bars	0 (0.0%)	8 (4.1%)	3 (1.8%)	4 (3.5%)	15 (2.5%)
Restaurant	12 (10.3%)	15 (7.7%)	5 (3.0%)	6 (5.2%)	38 (6.4%)
Take-away	5 (4.3%)	5 (2.6%)	1 (0.6%)	7 (6.1%)	18 (3.0%)
Total Food and Drink Establishment	23 (19.7%)	43 (22.1%)	22 (13.1%)	27 (23.5%)	115 (19.3%)

Table 16 Detailed breakdown of services (units)

Type of Retail Offer	Banstead	Reigate	Redhill	Horley	Total
Banking	1 (1.7%)	2 (1.0%)	9 (5.4%)	1 (0.9%)	13 (2.2%)
Bookmakers	2 (1.7%)	1 (0.5%)	2 (1.2%)	2 (1.7%)	7 (1.2%)
Dentist	3 (1.7%)	1 (0.5%)	0 (0.0%)	1 (0.9%)	5 (0.9%)
Dry cleaning	2 (1.7%)	2 (1.0%)	2 (1.2%)	2 (1.7%)	8 (1.3%)
Estate agents	8 (6.0%)	12 (6.2%)	9 (5.4%)	10 (8.7%)	39 (6.6%)
Hair and beauty	14 (12.0%)	21 (10.8%)	12 (7.1%)	11 (9.6%)	58 (9.8%)
Opticians	5 (4.3%)	5 (2.6%)	5 (3.0%)	2 (1.8%)	17 (2.9%)
Other services (e.g. employment, repairs etc.)	9 (7.7%)	9 (4.7%)	7 (4.2%)	13 (11.3%)	38 (6.4%)
Travel agents	0 (0.0%)	2 (1.0%)	0 (0.0%)	0 (0.0%)	2 (0.3%)
Total Services	44 (37.7%)	55 (28.2%)	46 (28.4%)	42 (36.6%)	187 (31.4%)

Table 17 Detailed breakdown of other (units)

Type of Retail Offer	Banstead	Reigate	Redhill	Horley	Total
Non-Retail	1 (0.9%)	4 (2.1%)	8 (4.8%)	8 (7.0%)	21 (3.6%)
Community	0 (0.0%)	0 (0.0%)	1 (0.6%)	0 (0.0%)	1 (0.2%)
Vacant	6 (5.1%)	11 (5.6%)	26 (15.5%)	9 (7.8%)	52 (8.8%)
Total Other	7 (6.0%)	15 (7.7%)	35 (20.8%)	17 (14.8%)	74 (12.4%)

3.6. Future Trends

The retail industry has been through multiple periods of consumer uncertainty over the past few years, largely due to the Covid-19 pandemic and the Russian invasion of Ukraine. The UK retail market also experienced a second year in a row of high inflation, leading to a focus on essential items and a challenging environment for flexible categories ([Mintel](#)). However, the impacts of Covid-19 and the Russian invasion of Ukraine have begun to decline, and inflation has receded more quickly than expected in November 2023 and markets now expect a sharper decline in interest rates, which should enable a faster recovery in living standards from last financial year’s record decline ([Office for Budget Responsibility](#)). [PwC](#) found that one in three households have money left for luxuries and savings, whilst a third of adults believe they have healthy finances, and more people were more optimistic than at the same period last year. Overall, according to the [British Retail Consortium](#), UK total retail sales increased by 3.5% year on year in March 2024, which was above the three month average growth rate of 2.1%, and the 12 month average growth rate of 2.9%.

Within the final quarter of the 2023-2024 financial year, [The Office For National Statistics](#) reports that retail sales volumes grew by 1.9% compared to the previous three months. There was an overall increase of 0.8% of retail sales volumes during the 2023-2024 financial year compared to the previous year but was still 1.2% below the pre-Covid pandemic level in February 2020.

When focusing on certain sectors specifically, [The Office For National Statistics](#) found that sales were mixed, where there was increase in the automotive fuel and non-food stores in March 2024 from the previous month, whilst there was a decrease in food stores and non-food retailers. Automotive fuels rose the most during this period, by 3.2%, where it reached its highest index level since March 2022. This increase could be down to various reasons, including increased travel following Covid-19 and increased footfall for retailers. Non-food stores, including department, clothing and household stores, saw an increase of 0.5% in March 2024, with this increase consistent with the rise in footfall on high streets. Rises were also seen in second-hand goods stores, hardware and furniture stores, and clothing stores. For food stores and non-food retailers, there were decreases of 0.7% and 1.5% in sales in March 2024 from the previous month, partly due to increased prices affecting consumer spending habits.

E-commerce continued to increase during this period too, recording an increase of 3.9% during the year, although this growth is still lower than the wider retail market ([Mintel](#)). Online sales continue to be popular too, however this has generally settled post-pandemic, with periodic spikes such as Black Friday. The proportion of online sales in 2024 has stabilised at around 25%-27% of total retail sales. [The Office For National Statistics](#) found that online sales had increased by 1.7% overall during the year from April 2023 – March 2024. However, the [British Retail Consortium](#) found that online non-food sales specifically saw a loss of 1.4% in March 2024, although this was still better than the previous year of 2.1% in March 2023. Although online sales are generally stabilising, around three-quarters of online UK shoppers still report that the best prices for products are still found online.

Although the UK staged a significant comeback during 2023 from the pandemic and the energy crisis, pressures on rising household costs continue to persist. [Retail Economics](#) state that with inflation not set to reach the 2% target until late 2025, household finances are not set to reach pre-pandemic levels for some time, whilst UK living standards are likely to fall by 3.5% in 2024-2025 compared to pre-pandemic levels, with household finances not expected

to reach pre-pandemic levels until 2027-2028. Consumer spending is therefore only expected to see flat to modest growth in 2024, mainly due to:

- Wages and inflation rebalance – average real incomes remain below 1%, and high interest rates hamper hiring prospects and limit spending
- Housing costs escalation – Increased mortgage rates are forcing more homeowners into spending less, with homeowners leaving fixed rate mortgages in 2024 expected to pay an extra £218 in repayments per month in repayments
- Savings returns vs borrowing costs – those with mortgages and loans are likely to cut on consumption due to increased borrowing
- Fiscal drag on higher earnings – although National Insurance costs are helping some earners, inflation-driven pay rises see more people fall into higher rate bands due to frozen thresholds ([Retail Economics](#))

The Retail Gazette identifies specific trends that will likely shape retail in the UK in 2024, with these being:

- Shoppers will buy more food
- Challenges for home and DIY retailers
- Seasonless fashion
- More human touch in stores, but also more technology and AI
- Commercialising the circular economy
- Further increases and improvements to loyalty schemes

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)