

Reigate & Banstead New Local Plan

Retail and Leisure Study

Final Report

Reigate & Banstead Borough Council

09 May 2024

LICHFIELDS

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Glossary

Benchmark turnover

Expected turnover of existing retail floorspace based on national averages which the identified available expenditure can be measured against.

Class A1

Commercial units/premises previously classed as retail or shop uses, but now part of the new Class E.

Class A2

Commercial units/premises previously classed as financial or professional services, e.g. banks and building societies, but now part of the new Class E.

Class A3

Commercial units/premises previously classed as restaurants and cafés, but now part of the new Class E.

Class A4

Commercial units/premises previously classed as public houses and bars, but now classed as Sui Generis.

Class A5

Commercial units/premises previously classed as hot food takeaway outlets but now classed as Sui Generis.

Class D2

Commercial units/premises previously classed as leisure, sport and recreation uses but now classed as Class E, Class F.1 or Sui Generis.

Convenience goods

Consumer goods purchased on a regular basis e.g. food/groceries and cleaning materials.

Comparison goods

Durable goods such as clothing, household goods, furniture, DIY and electrical goods.

Experian

A data consultancy widely used for retail and leisure planning information.

Food and beverage

Classes A3 food and drink outlets, selling food and drinks consumed away from the home or hot food takeaway food but not food and grocery items including convenience goods.

GlobalData

A market research and data consultancy widely used for retail planning information, previously Verdict Research.

Goald Plans

Town centre plans prepared by Experian, which are based on occupier surveys of over 1,300 town centres across the UK.

Gross floorspace

Total external floorspace including exterior walls.

Market share/Penetration rate

The proportion of total consumer expenditure within a given area taken by a particular town centre, destination or shopping/leisure facility.

Multi-channel shopping

Products made available to consumers on more than one sales channel, such as ecommerce websites, brick-and-mortar stores, marketplaces, comparison shopping engines, social media platforms, and other online channels.

Multiplex cinema

A cinema complex with five or more screens.

Net (sales) floorspace

Retail floorspace devoted to the sale of goods, excluding backstage/storage space and other areas not accessible to customers.

Oxford Retail Consultants (ORC)

A data consultancy widely used for retail planning information.

Special forms of trading (SFT)

Retail sales via the internet, mail order, stalls and markets, door-to-door and telephone sales, including on-line sales by supermarkets, department stores and catalogue companies.

1.0 Introduction

Overview

- 1.1 Lichfields has been commissioned by the Reigate & Banstead Borough Council (“RBBC” or “the Council”) to prepare a Retail, Leisure and Town Centres Study. This study includes an assessment of future retail and leisure related development needs within the Borough and informs a broader approach to the ways in which the Borough’s main centres can be supported and enhanced through strategic and detailed local plan policy. It will form part of the Council’s evidence base, to inform the production of a new Local Plan for the Borough.
- 1.2 The Council's last retail and leisure needs study was completed in June 2016. A new study is required to inform work on the new local plan, which takes account of the significant changes that have been taking place in retail and leisure since 2016 and to help plan for future needs, including supporting the long term success of the Borough's centres. The main objectives of the study area as follows.
- Undertake a review of the current town centres hierarchy and reconsider the roles and functions of the Borough's main centres, with advice on ways to strengthen the vitality and viability of centres over the plan-period, through strategy and policy mechanisms.
 - Assess the quantitative and qualitative (type, format and nature) needs for retail and leisure development within the Borough and make recommendations as to its distribution across the town centres and local centres.
- 1.3 The assessment of need for retail and leisure uses includes the following outputs:
- commentary on the impacts of trends in the retail industry, including the impacts of online shopping/e-tailing, the effects of changes to the use classes order;
 - identification of retail and leisure facility catchments for each town centre and out-of-shopping destinations, together with an assessment of market shares and local household spending patterns;
 - recommendations as to whether future growth should pursue constant or enhanced market share (across the Borough and for individual centres);
 - quantitative and qualitative assessment of the overall need for additional retail floorspace in the comparison and convenience sectors across the Borough;
 - assessment of the need for different types of leisure provision across the Borough, including food/beverage, cinemas, theatres, bowling alleys, other cultural facilities, live music venues, indoor town centre leisure facilities including gyms; and
 - assessment of the health of the four main centres, utilising the Council's own annual town centre monitoring data.

Report structure

- 1.4 Section 2 of this report provides a summary of current national planning policies and changes to the Use Classes Order introduced in 2020.
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- 1.5 Section 3 provides an overview of trends and recent changes that will affect the demand for retail and other relevant town centre uses. The appropriate policy and strategy approach for RBBC should reflect these underlying trends.
- 1.6 Section 4 examines the existing hierarchy of centres within the Borough and the surrounding area. Appendix 2 provides more detailed centre health checks for four key designated town centres in the Borough, as follows:
- Redhill;
 - Reigate;
 - Banstead; and
 - Horley.
- 1.7 A strengths, weaknesses, opportunities and threats (SWOT) analysis is included in the centre health checks.
- 1.8 Section 5 sets out the retail and food/beverage floorspace capacity assessment based on the latest available Experian expenditure and sales density projections. The capacity tables are shown in Appendix 2, 3 and 4.
- 1.9 Section 6 provides an assessment of other main town centre uses including the scope for leisure, entertainment and cultural uses. The capacity tables are shown in Appendix 5.
- 1.10 Section 7 reviews potential implications for future development plan policy taking account of updated floorspace capacity projections and recent changes to the Use Classes Order (UCO) and permitted development rights (PDR).
- 1.11 Section 8 summarises the main conclusions and recommendations.
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2.0 National Planning Policy

National Planning Policy Framework

- 2.1 The latest version (December 2023) of the National Planning Policy Framework (NPPF) remains unchanged in relation to the vitality of town centres. Paragraph 90 indicates planning policies should:
- define a network and hierarchy of town centres and promote their long-term vitality and viability - by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
 - define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
 - retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
 - allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
 - where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and
 - recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.
- 2.2 The rapid changes that are affecting the retail sector and town centres continue to be acknowledged and reflected in the latest NPPF. It recognises that diversification is key to the long-term vitality and viability of town centres, to 'respond to rapid changes in the retail and leisure industries'. Accordingly, planning policies should clarify 'the range of uses permitted in such locations, as part of a positive strategy for the future of each centre'.
- 2.3 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. Covid-19 and the cost of living crisis has elevated this debate. Online shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centre will become increasingly important. A broader mix of uses can extend activity throughout the daytime and into the evenings.
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Changes to the Use Classes Order

- 2.4 In September 2020, the UCO was significantly amended. Changes to town centre use classes now allow far greater flexibility for uses to change within town centres without constituting development. The UCO has significant implications for shopping area planning policies, restricting the ability of local planning authorities to control the mix of uses and retain specific uses previously protected e.g. Class A1 retail.
- 2.5 In relation to main town centre uses, as defined in the NPPF Annex 2 glossary, the UCO changes provide for three new use classes:
- Class E (Commercial, business and service);
 - Class F.1 (Learning and non-residential institutions); and
 - Class F.2 (Local community).
- 2.6 The UCO changes now combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. The new Class E also includes some uses that are not defined as 'main town centre uses' within the NPPF e.g. medical services and some light industrial uses.
- 2.7 Other changes potentially introduce more restrictions rather than flexibility. Partly in response to the impact of the Covid-19 crisis, there is added protection against the loss of learning, non-residential and community facilities, including museums, public halls, sports facilities and local shops. These uses are now included in new Classes F.1 and F.2. Class F.2 also includes small, isolated shops (at least 1 kilometre from a similar shop) selling essential goods including food.
- 2.8 Other potential 'bad neighbour' town centre uses have been placed in the list of Sui Generis uses, with no permitted changes of use e.g. pubs/bars (A4), takeaways (A5), cinemas and live music venues. The inclusion of these uses as Sui Generis appears to have a dual function i.e. controlling potential 'bad neighbour' uses such as pub/bars and takeaways, whilst protecting against the loss of other cultural facilities such as cinemas and music venues, most vulnerable to the impacts of Covid-19.
- 2.9 The previous distinction between Class A3, A4 and A5 uses has become more critical, with Class A3 uses now having more flexibility in the new Class E, but no flexibility for Class A4 and A5 uses. Many Class A3 restaurants offered a takeaway service during the Covid-19 crisis and the categorisation of bar/restaurants has always been arguable and will be a matter of fact and degree on a case-by-case basis. In response to these changes, future land use surveys should categorise uses within centres and frontages to reflect the new UCO, which is helpful when considering appropriate policy options and change of use planning applications.
- 2.10 The potential implications of permitted changes may also have unintended consequences in undermining the vitality and viability of town centres. In theory large out-of-centre B1 office buildings or D2 commercial leisure uses, with no restrictive conditions, could be converted to retail use without planning permission or an assessment of the impact on the town centre or application of the sequential test. Allowing retail uses to occupy out-of-centre buildings could run counter to the objective of maintaining and enhancing town
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centres. This change could have implications for the effectiveness of retail impact and sequential test policies.

- 2.11 In December 2020, the Government began a consultation on a variety of further changes to permitted development rights relating to housing delivery and public service infrastructure. The consultation included a proposed Class E to Class C3 permitted development right. The outcome of several elements of this were published and the associated amendments to the Town and Country Planning (General Permitted Development) (England) Order 2015 (GPDO) which were laid before Parliament in the Town and Country Planning (General Permitted Development etc.) (England) (Amendment) Order 2021. The Government subsequently published an amendment to the General Permitted Development Order in March 2024.
- 2.12 The new Class MA business and commercial to residential permitted development right introduced certain commercial to residential permitted development rights. The new class MA is different to previous retail and office to residential PD rights, with several different limitations and conditions. Delivering housing and the reuse of redundant shopping space is the Government's priority and the Class MA permitted development right emphasises this.
- 2.13 The new permitted development rights effectively reduce the scope of office to residential permitted development while increasing the scope of retail to residential and introduce new PD rights for other town centre uses to change to residential. These PD rights are subject to floorspace, vacancy and location limitations. The impact of these PD rights on the number of occupied retail premises in town centres is unclear at this stage, but generally the proportion of retail units has been falling over the past decade.
- 2.14 Class MA allows many properties within Class E to change to residential without consideration of impact on the high street where the proposal is outside of a conservation area and limited consideration if it is within a conservation area. The impact on the character and sustainability of the conservation area needs to be considered for ground floor proposals. There may also be restrictive planning conditions, Article 4 Directions or legal agreements that prevent change of use via Class MA.
- 2.15 Only listed buildings and their curtilage and properties in the most sensitive locations such as World Heritage Sites, National Landscapes and Areas of Outstanding National Beauty are excluded from the new PD right. The legislation requires assessment of loss of retail and office in beautiful and heritage locations, but in no other retail or business destinations. The retail assessment required by the previous Class MA PD right falls away.
- 2.16 Subject to limitations and conditions, former uses classes Class A1 (shops); Class A2 (financial and professional services); Class A3 (food and drink); Class B1 (business); Class D1(a) (non-residential institutions – medical or health services); Class D1(b) (non-residential institutions – crèche, day nursery or day centre) and Class D2(e) (assembly and leisure – indoor and outdoor sports), other than use as an indoor swimming pool or skating rink, now benefit from the Class MA PD rights. The changes introduced in March 2024 for Class MA remove the requirement that a building must have been vacant for a continuous period of at least 3 months immediately prior to the date of an application for prior approval. Additionally, Class MA has now been amended to remove the floorspace upper limit for buildings changing use under the right.
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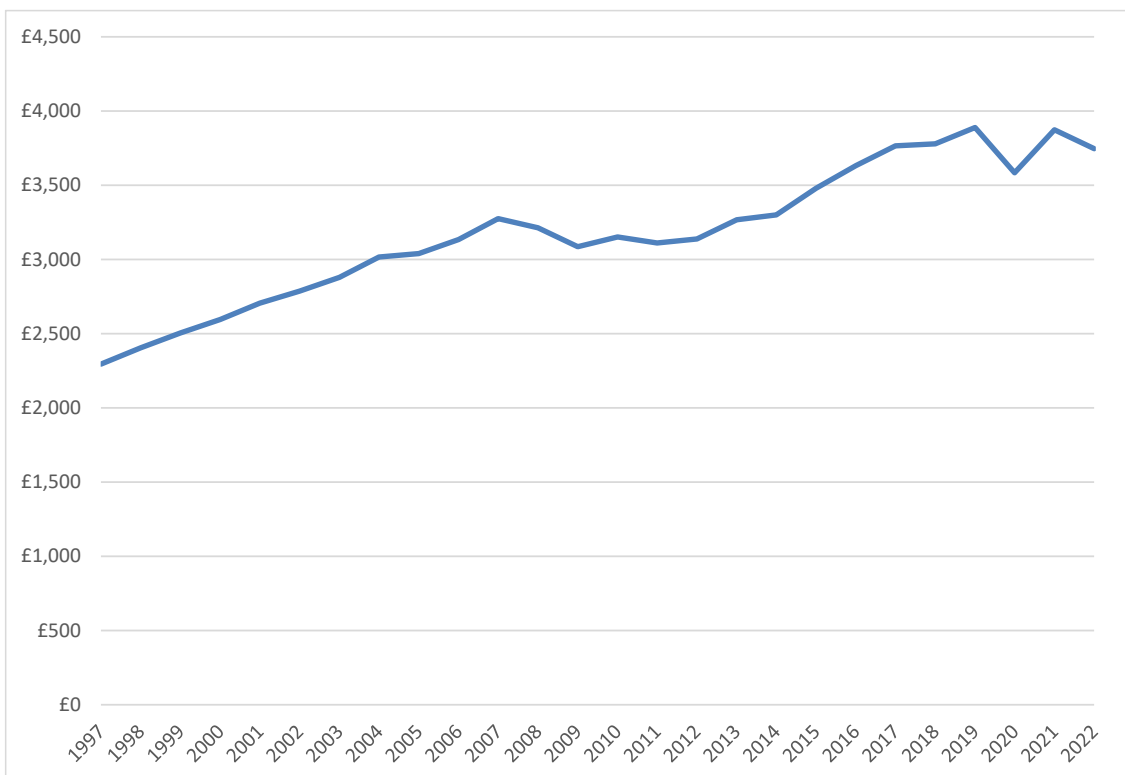
- 2.17 To benefit from Class MA, the use of the building must have fallen within Class E or one or more of the uses that it replaced for at least two years continuously prior to the date the prior approval application is made. The building previously needed to have been vacant for a continuous period of at least 3 months immediately prior to the date of the application for prior approval. The 2024 amendment removed the 3 months requirement. A key change arising from Class MA is the loss of a prior approval matter considering the impact of the loss of retail.
- 2.18 In a conservation area and where the change of use is at ground floor level, the impact on the character and sustainability of the conservation area is another new prior approval matter. Addressing this matter could potentially include a limited assessment of retail impact.
- 2.19 The requirement to meet space standards in relevant prior approval applications came into force in April 2021. The GPDO does not grant permission for any dwelling that would be less than 37 sq.m or would not comply with the nationally described space standard. These measures have raised concerns about the potential impact on high streets and shopping parades, which are essential to support local communities.
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3.0 Recent trends and key changes

Implications of Brexit, Covid-19 and other trends

3.1 Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. The growth in expenditure per person on comparison retail goods between 1997 and 2021 is shown in Figure 3.1. Experian is a data provider most often used in evidence base studies that provides consumer expenditure data and other economic forecasts. High expenditure growth between 1997 and 2008 fuelled demand for new retail floorspace. However, since the last recession in 2009 expenditure growth has been much slower and the demand for retail floorspace has reduced significantly, particularly comparison goods retail floorspace.

Figure 3.1 Comparison goods expenditure average per head in the UK (constant 2019 prices)



Source: Experian Retail Planner Briefing Note 21 (February 2024)

3.2 Experian's latest forecasts suggest slower expenditure growth and home shopping/internet spending is expected to continue to grow at a much faster rate than traditional shopping. Experian's short-term expenditure growth projections (2023, 2024 and 2025) for retail and leisure now reflect the expected effects of Brexit and the Covid-19 pandemic. The current cost of living crisis will also suppress expenditure growth in the short term.

3.3 The main implications of Brexit, Covid-19 and the cost of living crisis for the evidence base are likely to be as follows:

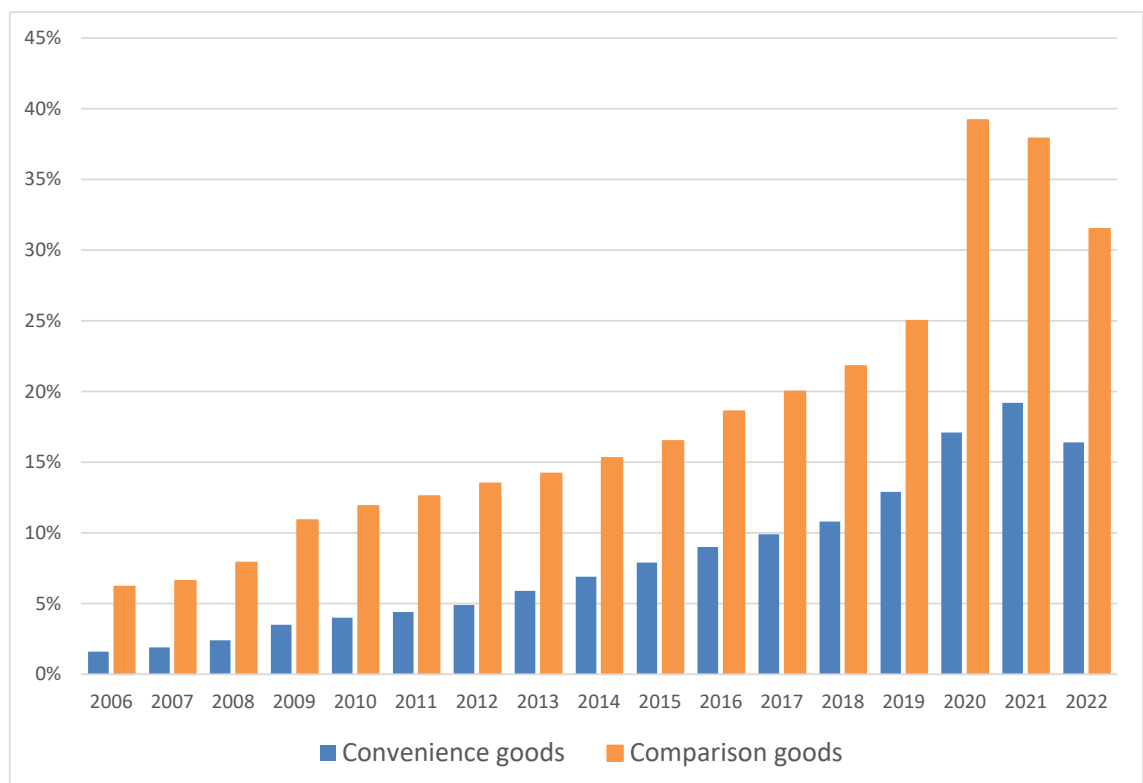
- impact on the reliability of demographic and economic projections i.e. population growth and Experian expenditure forecasts;

- short term impacts on the mix of town centre uses and customer behaviour that are likely to distort the base year position; and
- longer term structural impacts that could affect the nature of town centres and the way households shop, eat/drink out and participate in leisure activities.

- 3.4 The key uncertainties relating to the first two points are primarily the post Covid-19 recovery and the length of the cost of living crisis. The longer-term structural implications are harder to predict and quantify at this stage, however there are already signs of a bounce back in terms of expenditure growth, but the cost of living crisis may suppress this recovery.
- 3.5 In the short term, operators have faced elevated risks to cashflow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services were the hardest hit. Short-term supply chain disruption led to inflationary pressures, which will have an impact on consumer demand. Retailers with infrastructure to fulfil on-line orders/home delivery benefitted in the short-term. There is likely to be a long-term structural shift to multi-channel shopping, reducing the demand for physical space within town centres.
- 3.6 Bearing these trends in mind there has been a spike in town centre vacancies with some businesses failing to re-open following the Covid lockdowns, particularly non-food retail operators, restaurants and leisure uses. High levels of inflation and the cost of living crisis are likely to exacerbate difficult trading conditions. Many national operators have already announced job losses and store closures.
- 3.7 Brexit and Covid-19 could have short-term impacts in terms of population migration levels and a pause in construction activity. Given that the focus of this study is to assess the long-term need over the new local plan period within five-year interval projections, development plan policy should assume population projections will return to projected levels before 2030. The population projections in 2030, and certainly later years, should not be significantly affected by the Covid-19 and cost of living crisis.
- 3.8 This study has adopted Experian's population estimates, which reflect these trends.
- 3.9 Office of National Statistics (ONS) monthly sales volume information for Great Britain indicated total retail sales volumes during the first Covid-19 lockdown were over 22% lower in April 2020 compared with the pre-Covid position in February 2020 (seasonally adjusted). However, in the period between lockdowns (July and August 2020) sales volumes had recovered to pre-Covid levels. By October 2020 retail sales were 7% higher than the pre-Covid figure in February 2020. However, the reintroduction of Covid-19 restrictions saw a reduction in sales in between November 2020 to January 2021, reaching 5% below pre-Covid levels. Sales had recovered to 9% above pre-Covid levels by April 2021. The seasonally adjusted figures for November 2021 were 6% above pre-Covid levels.
- 3.10 The comparison goods (non-food) sector was particularly affected with a 50% drop in sales from February to April 2020, whilst the food sector experienced a 10% growth in sales during March 2020 in part due to panic buying at the start of the crisis. Food sales volumes were consistently higher than the February 2020 low point during March to November 2020.
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- 3.11 ONS data suggested on-line retail sales (seasonally adjusted) peaked at over 73% higher in May 2020 compared with February 2020. Figures for June 2020 to May 2021 were consistently higher than the pre-Covid sales in February 2020, with a second peak of nearly 81% higher than pre-Covid levels in February 2021.
- 3.12 During the first Covid lockdowns food store on-line sales doubled during May and June 2020 but still represented a relatively small proportion of total sales in this sector, reaching about 11.9% in January 2021, but reducing slightly to 9.7% in November 2021. For the non-food sector on-line sales as a percentage of total sales nearly trebled between February and April 2020, reaching 45% of sales. By November 2021 on-line sales in this sector were still 23.2% of total sales, compared with the pre-Covid level of 16.1% in February 2020.
- 3.13 Experian's Retail Planner Briefing Note 21 (February 2024) suggests non-store retailing's market share increased from 20.4% in 2019 to 30.5% in 2021. Non-store sales include all on-line sales and other forms of sales not generated from physical retail floorspace e.g. vending machines, party plan and deliveries. Comparison non-store sales increased from 25% to 37.9% and convenience good sales increased from 12.9% to 19.2%. However, Experian indicates comparison goods non-store sales figure fell slightly during 2022 down to 36%. Nevertheless, the 2022 figures remain significantly higher than the pre-Covid market shares in 2019. The growth in non-store retail sales in the UK between 2006 and 2022 is shown in Figure 3.2.

Figure 3.2 Non-store sales as a percentage of total sales in the UK



Source: Experian Retail Planner Briefing Note 21 (February 2024) – Appendix 3

- 3.14 This data shows a sharp increase in non-store sales during the Covid lockdowns during 2020 and 2021, but a decline in 2022. Experian's forecasts suggest a continued reduction during 2023 but steady growth thereafter. Experian's 2023 forecast figures remain significantly higher than the pre-Covid market shares in 2019.
- 3.15 It is difficult to predict the longer term implications for retail sales and the amount of on-line sales. Nevertheless, ONS's post lockdown data suggests retail sales have recovered to previous levels of growth, but the proportion of retail sales spent on-line is a higher proportion of total sales, which will have an impact on traditional bricks and mortar retailing. Conversely the introduction of return fees for on-line shopping and increased fee delivery thresholds may benefit traditional retailing.
- 3.16 Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth in on-line shopping when compared with historic trends. It is not appropriate to assume a significant shift towards on-line shopping, over and above the levels of growth already predicted by Experian, but a higher shift to on-line shopping is possible. These longer term forecasts should be monitored and kept under review.

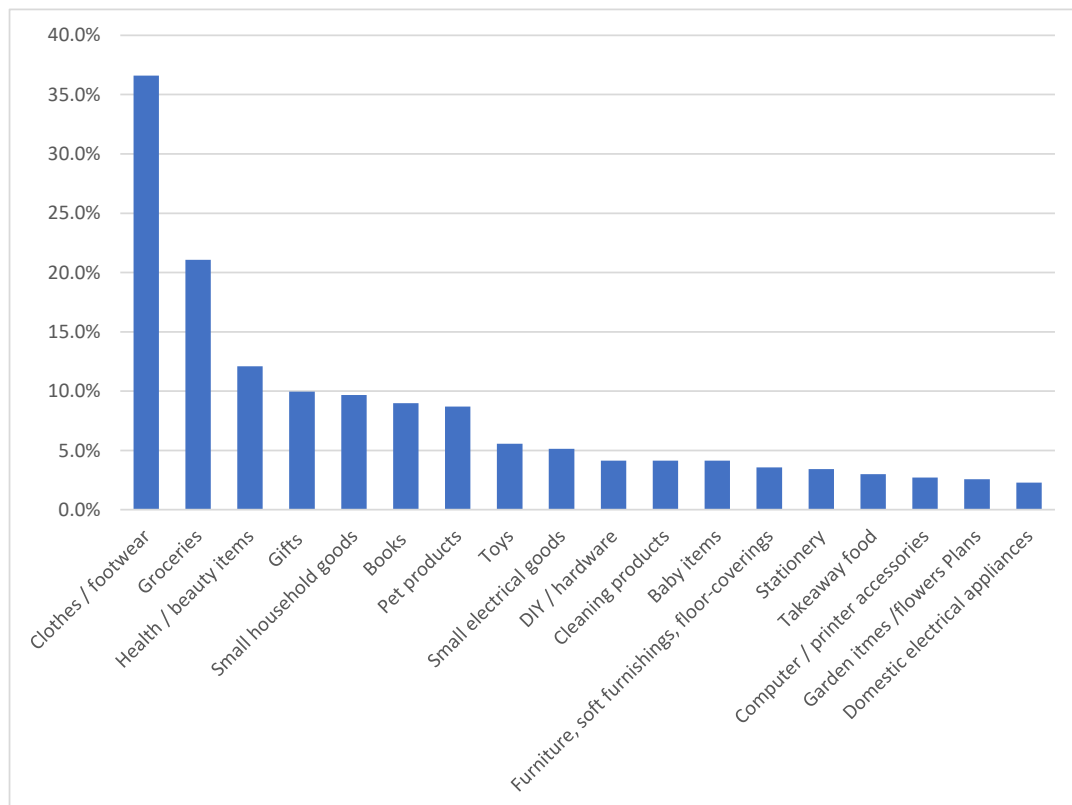
Long-term expenditure trends

- 3.17 The current cost of living crisis, including the high level of inflation, resulted in a reduction in retail expenditure per person during 2022, with many customers either trading down (buying cheaper products or using discount retailers) or cutting back (buying less products). Experian indicates a continued decline during 2023 and 2024. Low growth is then predicted during 2025 and 2026 but higher growth is expected in the longer term.
- 3.18 Planning based on long term expenditure growth projections has always had inherent uncertainties. Despite these uncertainties, development plans should assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth, as now suggested by Experian, should be adopted, bearing in mind the uncertainties relating to the growth in on-line shopping.
- 3.19 For convenience goods, Experian's latest forecasts (February 2024) suggest a continued period of readjustment following high growth in expenditure experienced during the Covid-19 lockdowns in 2020 and 2021. No expenditure growth is envisaged between 2026 to 2030. In the longer term limited growth is forecast at 0.1% per annum thereafter. Experian expects most growth in the future will relate to non-store sales. Any need for new convenience goods retail floorspace in the Borough is likely to relate to population growth, high current levels of trading or qualitative areas of deficiency.
- 3.20 Experian indicates comparison goods expenditure per head fell by 1.2% during 2024, but is predicted to increase by 2.7% during 2025. Modest growth is expected in the longer term (between 2.8% to 3.1% per annum), but still at a lower rate than previous historic trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has
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grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.

- 3.21 New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued steady growth in multi-channel activity.
- 3.22 The floorspace capacity assessment in this study update makes an allowance for future growth in e-tailing based on Experian's latest projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.
- 3.23 The household survey results for 702 completed interviews during November 2023 across the Reigate and Banstead study area as shown in Appendix 1, indicate many households regularly buy items from the internet for home delivery. The survey results suggest 44.2% of respondents do most of their household's non-food shopping on-line and 14.5% of households did their last main food and grocery shop via the internet/delivery.
- 3.24 The products most regularly purchased by households online are shown in Figure 3.3. These survey results indicate that a broad range of non-food goods are purchased on-line, but clothing /footwear and groceries are most often purchased online.

Figure 3.3 Items most (top three) regularly purchased via the internet (% of all households)

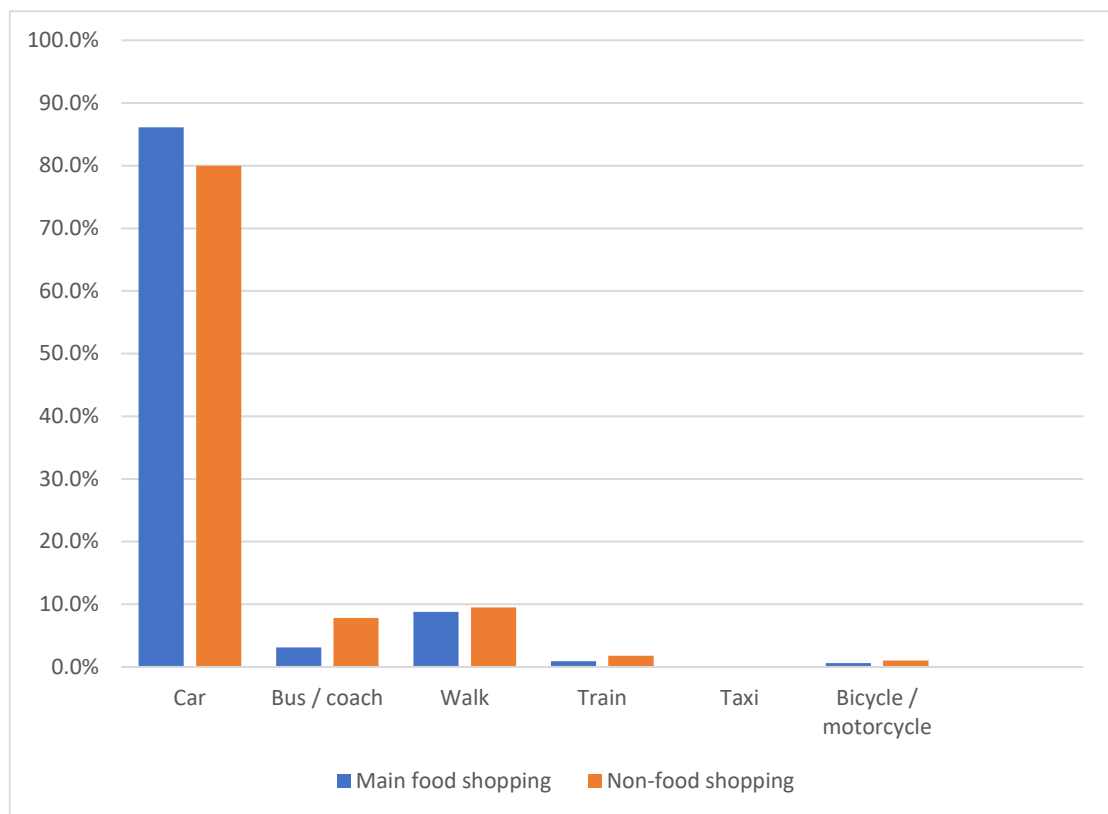


Source: NEMS household shopper survey November 2023 (weighted results)

Mode of travel and frequency of trips

- 3.25 As indicated above, 44.2% of respondents do most of their non-food shopping on-line and 14.5% did their last main food and grocery shop via the internet/delivery. Experian suggests over 30% of retail sales was via non-store activity in 2021. These figures suggest many households do not need to travel to undertake food and non-food shopping.
- 3.26 Despite the increasing proportion of households shopping via the internet, the majority continue to travel to shopping destinations by car. The results for food and non-food shopping (excluding internet/home shopping) are shown in Figure 3.4.
- 3.27 Shopping by car (driver or passenger) is still the most popular mode of travel for both non-food and main food shopping trips. Relatively low proportions of customers walk or travel by public transport to shop for both food and non-food shopping.
- 3.28 Car usage is generally higher for main food shopping than for non-food shopping because many households still undertake bulk food and grocery shopping once a week or less often. Non-food shopping trips are generally undertaken less frequently. Bus, train and walking is slightly higher for non-food shopping.

Figure 3.4 Mode of travel for non-food and main food shopping (% of travelling household respondents)



Source: NEMS household shopper survey November 2023 (weighted results).

- 3.29 Car travel for food and non-food shopping was high across all zones. Based on Lichfields' recent experience, car usage for shopping is generally lower within predominantly urban areas and higher in rural areas i.e. normally below 70% of households for main weekly

shopping in urban areas and over 85% in rural areas. Lower levels of car usage in urban areas is normally due to higher levels of access to shopping facilities, both on foot and via public transport.

Demand for Town Centre Uses

- 3.30 In the past, lower expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but increased to 14.4% in 2022. There has been a sharp increase in shop vacancies in many town centres due to the impacts of the Covid-19 pandemic, the cost of living crisis and the growth in on-line shopping. The impact of changes to the Use Classes Order and permitted development rights is unclear at this stage. The more recent impact of higher inflation and the cost of living crisis is also likely to constrain consumer demand, which may affect the demand for floorspace at least in the short term.
- 3.31 The Council's surveys during July 2023 indicate the number of vacant units was 94 units in the designated town and local centres in the Borough. The average shop unit vacancy rate was 9.4% across the Borough's 998 shop/service premises. This figure excludes Class B, D1/D2 and residential uses in town centres. The Borough's shop vacancy rate is lower than the UK pre-Covid-19 average (12.4%) and much lower than the current post-Covid/cost of living crisis national average (14.5%). However, Redhill town centre has a relatively high shop vacancy rate (18.2%), including six vacant units in the Rise development at the time of the survey. More recent letting agents details suggest only two units are available in the Rise development with two under offer.
- 3.32 The underlying increase in vacant units across the UK is primarily due to the reduction of comparison goods retail outlets. In most centres, non-retail services have helped to replace some of the lost comparison goods retail outlets, has been assisted by the introduction of the new Class E which includes retail uses. A more detailed analysis of the mix of uses in the Borough's main centres compared with the national picture is set out in Appendix 2.
- 3.33 Property owners, landlords and funds have come under increasing pressure with struggling occupiers seeking to renegotiate terms through a company voluntary arrangement (CVA) i.e., an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all debts. Elsewhere, retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/leisure assets. These trends were exacerbated by Covid-19 and the cost of living crisis and will continue in the short-term.
- 3.34 Whilst the CVA process has created difficulties for landlords in terms of rent negotiations, at the same time newly freed-up space has provided new opportunities. Vacated premises have been reconfigured and reused for food/beverage, trampolines, climbing and indoor golf.

Food store operators

- 3.35 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include
-

smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/ Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food formats).

- 3.36 Across the UK the number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. The number of Tesco Express stores has increased by 35%, from 1,427 stores in 2012 to 1,920 stores in 2020 (source: Mintel). During the same period Sainsbury's Local stores increased by 83% and the number of Little Waitrose stores doubled.
- 3.37 Several proposed larger food superstores were not implemented across the country. There has been a move away from larger superstores to smaller formats, reflecting changes in customers' shopping habits i.e. more frequent but smaller food and grocery shopping trips. This trend may have increased with more homeworking during the pandemic lockdowns, which may not move back to pre-Covid levels in the future.
- 3.38 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. These operators are now competing more directly for market share with other main food store operators. Home Bargains and B&M have also expanded rapidly in recent years. This trend is not evident in Reigate & Banstead Borough with only one Lidl store in Horley. This absence of discount stores may be due to the limited availability of suitable development sites in the Borough.

Comparison retailers

- 3.39 Comparison retailers responded to difficult market conditions before the Covid-19 pandemic. The bulky goods warehouse sector had already rationalised, including mergers and failures, and scaled down store sizes. Other traditional high street retailers previously sought large out-of-centre stores, for example Next, TK Maxx and M&S. Matalan also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct expanded out-of-centre. These trends have slowed significantly and to some extent reversed recently, despite the additional flexibility now offered by the new Class E. These retail warehouse trends are unlikely to re-emerge for the foreseeable future.
- 3.40 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, has been particularly weak in recent years. This has led to voids on some retail warehouse parks and proposals to extend the range of goods sold to non-bulky comparison goods. This trend has also led to the relocation of retailers to out of centre locations, creating more vacant units in town centres. The discount sector has occupied many units on retail parks e.g. Home Bargains, Poundland and B&M Bargains. The retail warehouse sector is reasonably unrepresented in the Borough with only two designated areas at Brighton Road, Redhill and Rushworth Road in Reigate, but there are concentrations of retail warehousing in neighbouring authorities e.g. Crawley and Croydon.
- 3.41 Within centres, many high street multiple comparison retailers have changed their format. For over two decades, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation into the larger regional and sub-regional centres. Many multiple retailers now require representation in fewer locations to service catchment areas. This trend is evident in most centres in London and
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the South East with the main focus of comparison goods national multiples present in Croydon and Kingston town centres in south and a limited provision in other smaller centres.

3.42 In general, operator demand for space has decreased significantly during the last 5 years and, of those national multiples looking for space, many prefer to locate in larger centres. Centres in the Borough, apart from Redhill town centre, are at a lower level in the hierarchy and multiple operator demand may be much less in these centres in the future. Polarisation of investment in the larger centres is likely to continue in the future, with many retailers reducing their overall number of outlets.

3.43 The continuation of these trends will influence future operator space requirements in the Borough with smaller vacant units and lower tier centres continuing to be less attractive for new multiple occupiers, and retailers increasingly looking to locate into larger units in larger town centres. However, smaller vacant units could still be attractive to independent traders and non-retail services looking to serve local catchment areas.

Charity and discount shops

3.44 The charity shop sector has grown steadily over the past 30 years and there is no sign this trend will change soon. This trend has raised concerns in some areas regarding over-concentrations of charity shops at the expense of other retail uses. Nevertheless these outlets do provide an important role in offering affordable goods and a service to those wanting to recycle goods.

3.45 Planning policies cannot control the amount of charity shops because they fall within the same use class as other shops (now Class E). In many centres, charity shops have occupied vacated shop premises during previous recessions. This trend is evident in the Borough with a strong presence of charity shops in the four town centres. There are 25 charity/second-hand shops within the Borough, 10% of all comparison shops, which is comparable with the UK average of 9.9%.

3.46 Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It does not follow that these charity shops will be replaced by traditional shops when the market recovers.

Non-retail services

3.47 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. The non-retail service uses include the following Class E and Sui Generis uses:

- hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as hot food takeaways), funeral parlours and post offices;
 - banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies;
 - restaurants, cafés and hot food takeaways; and
 - pubs/bars.
-

- 3.48 The number of bank/building society outlets has decreased significantly during the last two decades, with banks looking to reduce costs and the increase in on-line banking. The proportion of town centre units occupied by banks/building societies was 4.6% of all units in 2005. This proportion had reduced to 2.8% in 2017 and was only 1.8% in 2023. Many smaller town centres now have no remaining banks/building societies. The Council's land use survey (July 2023) indicated there were only 11 banks/building societies present in the Borough, focused within the four main centres.
- 3.49 The growth of money lending/pay day loan shops, betting shops and hot food takeaways has raised concerns amongst many local planning authorities and has resulted in a change to permitted development rights to control the growth of these uses in town centres. These trends have been evident in the Borough.
- 3.50 There are 10 betting shops spread across the Borough in 2023, which is about 1% of all units, comparable with the national average. There are no over-concentrations of betting shops in the Borough's centres.
- 3.51 There were 54 hot food takeaways in the Borough's town and local centres, 5.4% of all units, which is below the UK national average of 6.4%. Horley town centre (6.5%) have the highest proportion of hot food takeaways of the four main centres. The proportion of takeaways is higher (8.2%) in the local centres.
- 3.52 Changes to the GPDO has had an impact on some town centres but the more recent changes to the Use Classes Order (UCO) and permitted development rights (PDR) are likely to lead to more significant changes in the future. These measures allow for much greater flexibility for changes of use from retail to non-retail uses. To date, these measures have not significantly changed the composition of most town centres, which may have been suppressed by the Covid pandemic. The impact of these changes will need to be carefully monitored. The cost of living crisis and continued growth in on-line shopping may increase demand for change from retail to other uses.

The evening economy

- 3.53 Food/beverage, leisure and entertainment are fast moving and creative sectors, with a steady flow of new concepts emerging. Within these sectors there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage, but primarily in larger centres.
- 3.54 Recently restaurant chains have experienced difficulties resulting in closures, which suggests operators may have over-stretched. Demand continued to increase for coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains invested heavily and not exclusively in larger centres. Themed restaurants also expanded rapidly. This sector in town centres has been the most adversely affected by the Covid-19 crisis and the potential for growth in the short-term is uncertain. The key categories for the food and beverage offer are:
- *Impulse*: characterised by their produce range that is typically highly visual and hand-held so that it can be eaten "on the go";
-

- *Speed eating fast food*: food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
- *Refuel and relax*: a drink, snack and a short break in a pleasant environment rather than focusing on eating a main meal; and
- *Casual dining/leisure dining*: incorporating several food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

3.55 The proportion of non-retail uses within town centres across the UK increased significantly before the Covid-19 crisis. This trend was evident in the Borough, and this sector appears to have recovered following the Covid crisis.

Pop-up spaces

3.56 The increase in vacant space across the UK has led to an increase in premises available for temporary uses or pop-up uses including temporary restaurants, bars, shops and galleries. Some landlords have opted for flexible leases, with changing attitudes towards short-term spaces. New independent brands have benefitted despite the lack of brand recognition. E-commerce brands have also sought physical presence, as an essential part of their marketing strategy and an effective way to engage with existing and new customers off-line. Brands have opened pop-up outlets in different locations to test and learn before committing to permanent stores. This trend is evident in the Borough e.g. the Reigate Pop Up and outlets in the Belfry Shopping Centre in Redhill. This trend is likely to continue particularly during the cost of living crisis.

Summary

3.57 The trends and changes highlighted in this section, including the growth of home shopping, are not new and have been affecting the high street for many years. In response to these trends, most town centres have changed and diversified. The food/beverage, leisure and non-retail service sectors have to some extent been successful in occupying space no longer attractive to retail tenants. However, the shop vacancy rate in Reigate & Banstead Borough remains relatively low, significantly below the UK average, apart from Redhill town centre.

3.58 There have been cyclical trends in vacancy rates reflecting the macro-economic trends, but in most cases, town centres recovered during periods of stronger growth. Many believe the most recent decline is structural rather than cyclical and a more flexible approach to town centre uses is required.

3.59 The most recent trends suggest vacancy rates have been slow to recover in weaker centres, and many high street retailers are still experiencing difficulties. The Goad national shop vacancy rate has increased to over 14% and therefore a cautious approach to future development needs is required. The implications of the cost of living crisis also endorse a cautious approach to providing additional retail floorspace, particularly in out-of-centre locations.

3.60 Shopping behaviour will continue to change, and town centres will need to respond. All centres will need to focus on their advantages over other forms of multi-channel shopping,

for example using the internet as an extended shop window, click and collect facilities and providing a combined retail, leisure and cultural experience for those looking for a "day out" or "evening out."

4.0 Hierarchy of centres

National policy

- 4.1 The NPPF (paragraph 86) indicates planning policies should define a network and hierarchy of town centres and promote their long-term vitality and viability by allowing them to grow and diversify. Town centres as defined in the NPPF comprise a range of locations where main town centre uses are concentrated, including city and town centres, district and local centres. Local centres exclude small parades of shops of purely neighbourhood significance. The NPPF and PPG provide limited guidance on how to categorise town, district and local centres.

Designated centres in Reigate and Banstead

- 4.2 The Reigate & Banstead Local Plan: Core Strategy (Adopted July 2014) identified the hierarchy of centres on the Key Diagram and Policy CS7: Town and Local Centres. This approach was reviewed in July 2019 and found sound. Redhill town centre is identified as the *Primary Centre* and a Priority Area for regeneration. Redhill was identified as the prime focus for large-scale leisure, office, cultural and retail uses and developments.
- 4.3 Banstead Village, Horley and Reigate were identified as *Town Centres*, where the Council will seek to maintain a balance of uses and development that promote the vitality and viability of the centre.
- 4.4 The Core Strategy Key Diagram shows 20 *Local Centres*, which provide for more local needs and accessible service. However, the Reigate & Banstead Local Plan – Development Management Plan (Adopted September 2019) designates 27 *Local Centres*, the boundaries are shown in Figure 4.1. The 27 designated centres are summarised in Table 4.1 and 4.2, based on the Council’s land use data in July 2023.

Table 4.1 Town and local centres in Reigate & Banstead – floorspace (sq.m gross) by use

	Total	Comparison goods retail	Convenience goods retail	Food/beverage	Other services*	Vacant
Redhill	57,597	20,806	17,022	5,987	5,687	8,095
Reigate	30,354	11,497	6,875	6,172	4,498	1,312
Banstead	15,579	4,414	4,850	3,182	2,511	622
Horley	22,241	6,860	6,318	3,895	3,685	1,483
Town centre sub-total	125,771	43,577	35,065	19,236	16,381	11,512
Local centres (combined)	38,731	9,188	7,699	8,992	8,792	4,060
Total	164,502	52,765	42,764	28,228	25,173	15,572
% All units	100.0	32.1	26.0	17.2	15.3	9.5

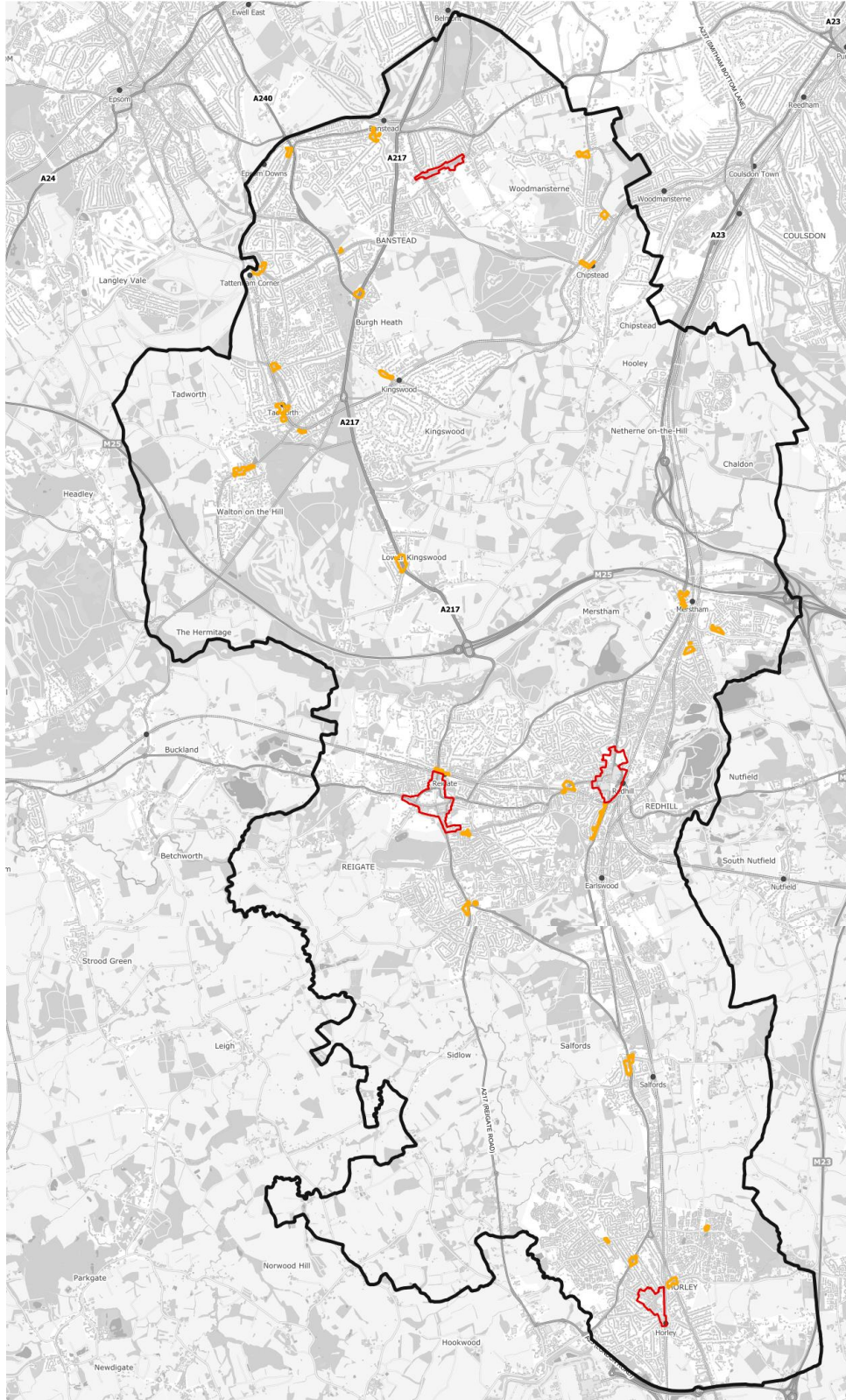
Source: RBBC land use survey July 2023.

* excluding Class B, office, D1/D2 and residential uses.

- 4.5 Redhill and Reigate are the largest centres with a wide choice of retail outlets, food/beverage and service uses, followed by Banstead and Horley. However, in terms of total floorspace, Redhill is much larger than Reigate, particularly in relation to comparison and convenience goods retail floorspace. Redhill has 51 comparison goods outlets compared with 77 in Reigate, but the average size of store is much larger (408 sq.m gross compared with 149 sq.m gross). Reigate’s units area generally smaller partly due to the historic core of

Reigate town centre. Banstead and Horley are much smaller in terms of retail units and floorspace.

Figure 4.1 Designated town and local centre boundaries in Reigate & Banstead Borough



Source: RBBC Development Management Plan Policy Map (on-line)

Table 4.2 Town and local centres in Reigate & Banstead – number of outlets by use

	Total retail units	Comparison goods retail	Convenience goods retail	Food/beverage	Other services(1)	Vacant units
Redhill	153	51	12	20	42	28
Reigate	188	77	9	41	50	11
Banstead	111	38	12	22	35	4
Horley	108	25	8	24	42	9
Woodhatch	33	14	7	5	7	0
Brighton Road	29	5	3	7	9	5
Nork Way	28	5	4	5	13	1
Lesbourne Road	24	6	3	2	11	2
Linkfield Corner	24	7	3	4	7	3
Walton on the Hill	24	4	2	5	11	2
Tattenham Crescent	22	5	4	5	8	0
Station Road Horley	21	5	2	6	5	3
Tadworth	21	3	4	4	6	4
Nutfield Road	20	0	1	5	6	8 (2)
Chipstead Station Approach	19	1	4	2	7	5
Salfords Brighton Road	17	3	1	5	6	2
Mersham Village	16	1	1	4	9	1
Burge Heath	15	5	2	4	3	1
Holmesdale Road	15	2	2	6	4	1
Kingswood Waterhouse Lane	15	1	3	4	7	0
Horley Brighton Road	14	4	2	3	5	0
Shelvers Way	13	3	2	2	6	0
Drift Bridge	10	2	2	3	3	0
Lower Kingswood	10	3	2	2	2	1
Tattenham Way	9	0	2	0	6	1
Woodmansterne	9	2	2	2	3	0
Portland Drive	8	1	2	4	1	0
Horley Row	7	0	2	2	2	1
Rectory Lane	7	0	1	1	4	1
Tadworth High Street	6	2	2	1	1	0
The Acres Horley	2	0	1	1	0	0
Total	998	275	107	201	321	94
% all units	100.0	27.6	10.7	20.1	32.2	9.4

Source: RBBC land use survey July 2023.

(1) Excluding all Class B uses, office, D1/D2 and residential uses.

(2) includes parade of shops vacated pending conversion to residential.

- 4.6 The designated Local Centres vary significantly in size from only 2 units (The new Local Centre at the new North East Horley Neighbourhood, The Acres) to over 30 units (Woodhatch). Most Local Centre have 15 or more retail/service units.
- 4.7 Some of the designated Local Centres are in fringe areas close to larger Town Centres i.e. Holmesdale Road in Reigate and Brighton Road in Redhill.
- 4.8 The household survey results also shed light on the position of each centre in the hierarchy. Respondents were asked at which location they buy most of their household's non-food shopping. Respondents were also asked which of the four town centres in Reigate & Banstead they had visited to use shops, services and leisure facilities in the last year, and the results are shown in Table 4.3.

Table 4.3 Destinations used by households (% of all respondents in the study area)

Destination	Visited during the last year	Main non-food shopping destination
Redhill	54.0	7.0
Reigate	58.7	4.9
Horley	23.7	1.0
Banstead	40.4	1.8

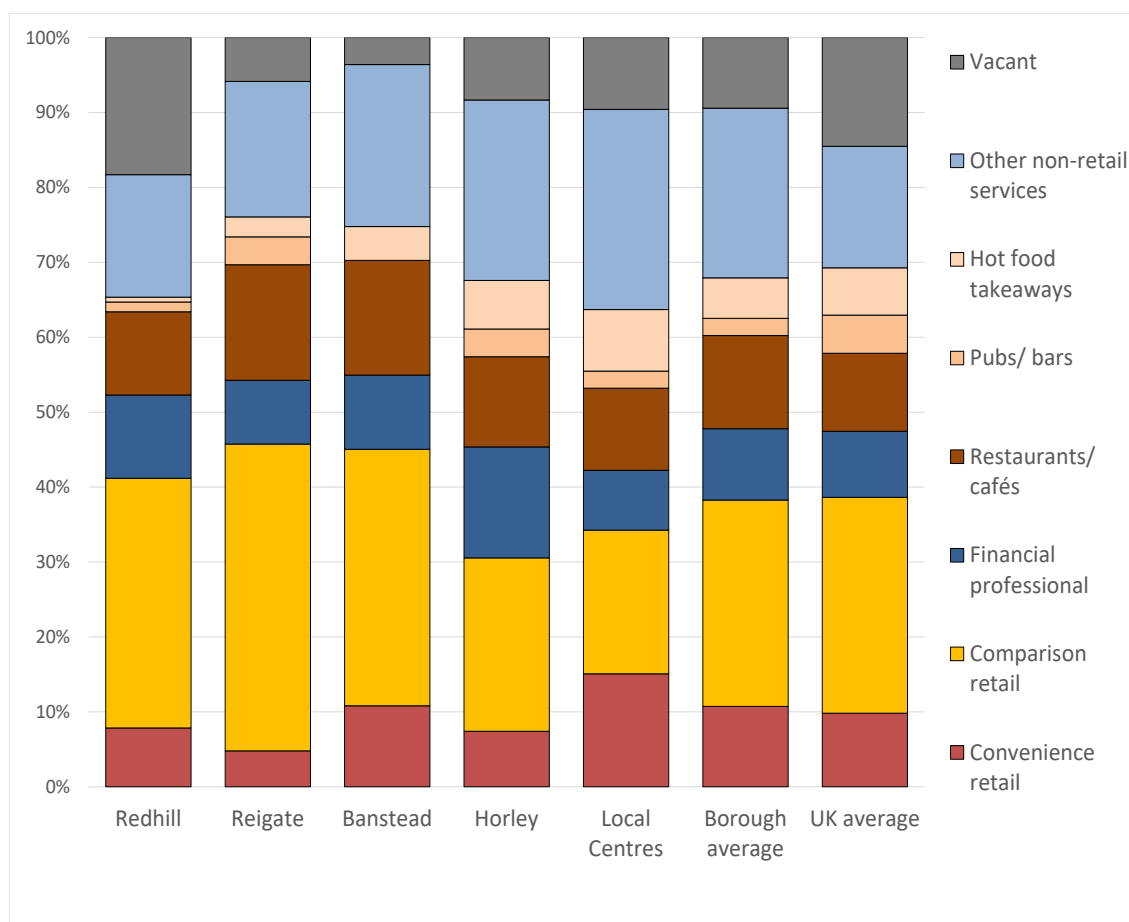
Source: NEMS household survey (November 2023)

- 4.9 Redhill and Reigate are the main non-food shopping destinations in the Borough, but the proportion of all respondents in the study area who do most of their non-food shopping at these destinations is relatively low (7% and 4.9% respectively). Banstead and Horley have the lowest proportions of regular visitors, reflecting their size and importance in the wider hierarchy. A high proportion (44.2%) of respondents do most of their non-food shopping via the internet/delivery. The main non-food destinations outside Reigate and Banstead Borough were Crawley (7.6%), Epsom (2.5%), Kingston upon Thames (2.6%), Bluewater (1.6%) and Croydon (1%).

Diversity of main town centre uses

- 4.10 Figure 4.2 below shows the composition of the four town centres in terms of the mix and proportion of different uses i.e. the proportion of shop units within each use class. This is compared with the Borough and Goad Plan average mix for centres across the UK. More detail is provided in the health check analysis in Appendix 2.
- 4.11 All four centres have a reasonable mix of retail and service uses, but Horley and the Local Centres have a lower proportion of comparison goods retail uses than the national average. The town centres all have a reasonable provision of non-retail services. The food/beverage offer varies significantly, with good provision in all centres except Redhill.
- 4.12 Shop unit vacancy rates in Reigate & Banstead Borough is generally lower than the current UK average (14.5%), but Redhill has a high vacancy rate of 18.3%.
- 4.13 Local Centres generally have higher proportions of convenience goods retail uses and non-retail services e.g. hair salons and hot food takeaways than larger town centres.
- 4.14 The overall mix of use in the Borough is broadly in line with the UK average in terms of comparison and convenience goods retail and financial professional services. The Borough's town and local has a slightly lower provision of pubs/bars and hot food takeaways, but a higher provision of restaurants/cafés and other non-retail services. Outside the town and local centres there are a number of public houses within country villages.

Figure 4.2 Mix of retail and service uses (excluding Class B, D1/D2 and residential uses) - % of all units

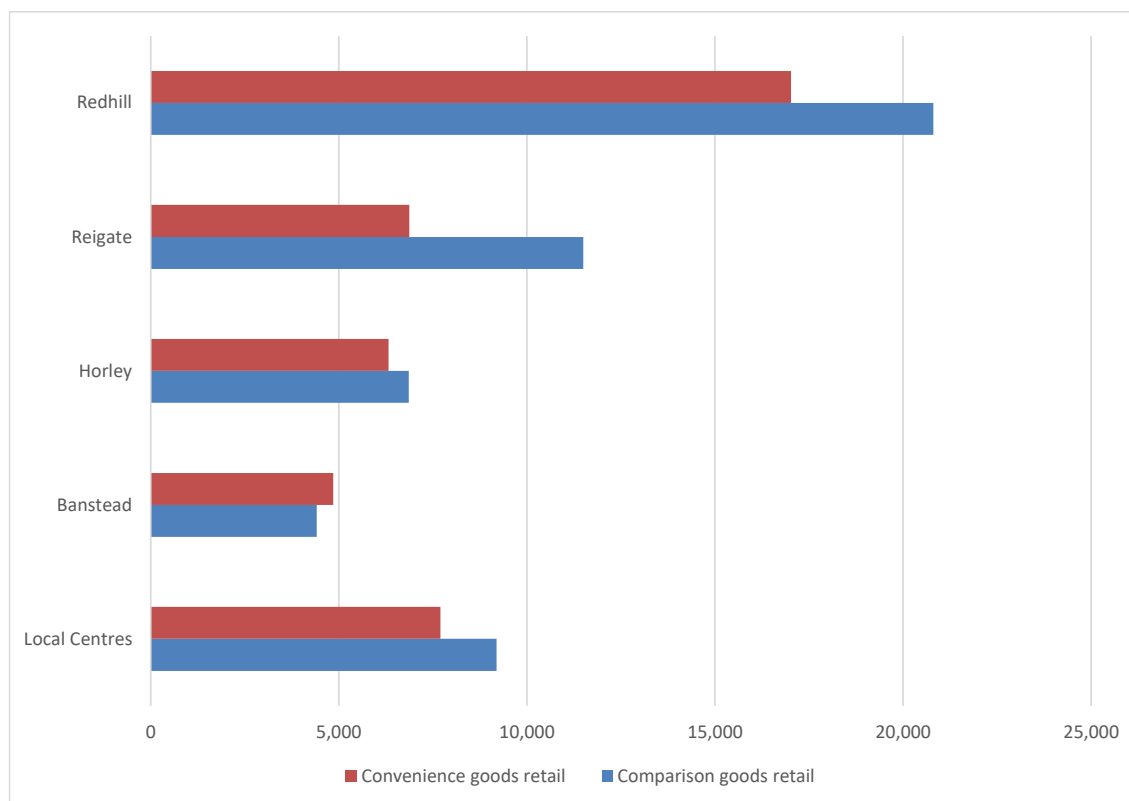


Source: RBBC land use survey July 2023 and Experian Goad Plan UK averages.

Retail representation

- 4.15 Figure 4.2 compares the proportion of convenience and comparison retail units within centres. Most of the Borough’s comparison goods retail floorspace is focused in Redhill and Reigate. Banstead and Horley have a more even balance between comparison and convenience goods retail floorspace. All town centres have a strong provision of convenience goods floorspace due to the presence of large food stores.
- 4.16 In general, larger centres tend to have a higher proportion of comparison goods shop units than smaller centres. Larger centres tend to have a stronger focus on fashion shopping and therefore have a higher proportion of comparison shops. Smaller centres tend to have a higher proportion of convenience goods units and non-retail services such as hot food takeaways, catering for the day to day needs of their local catchment area. Convenience goods retail and non-retail services perform an important role in all centres, serving relatively localised needs.
- 4.17 A more detailed analysis of the mix of retail uses in each centre is shown in the town centre health checks in the Appendices.

Figure 4.3 Comparison and convenience goods retail floorspace (sq.m gross)



Source: RBBC land use survey July 2023

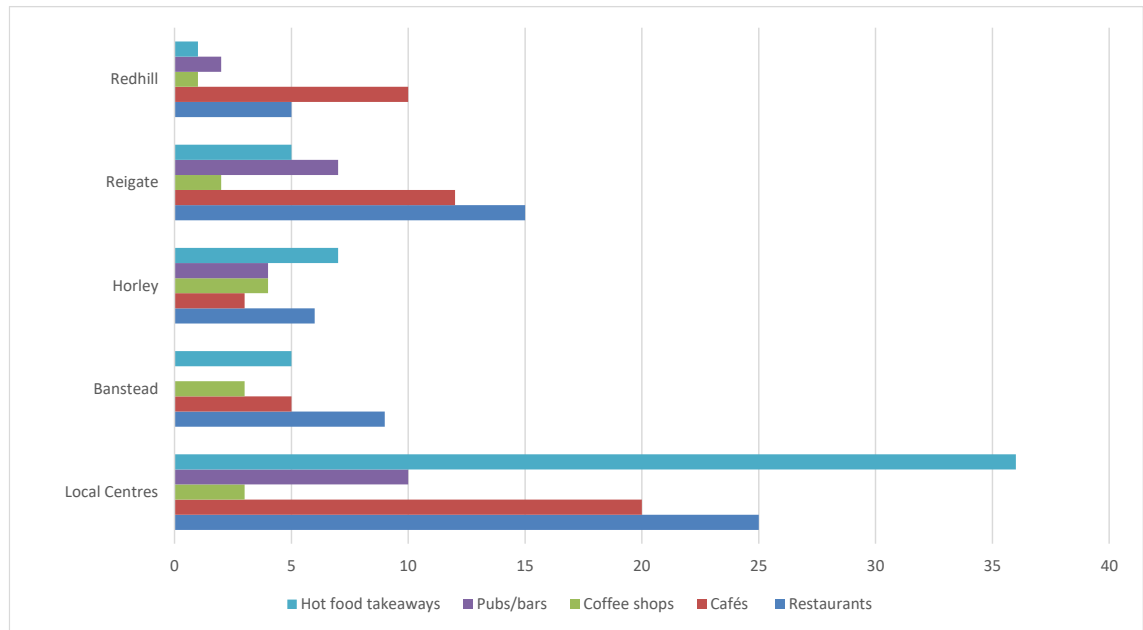
Service Uses

4.18 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. Figures 4.4 and 4.5 below summarise the number and proportion of units in different service categories. The service uses are categorised as follows:

- financial and professional services including banks, building societies, financial services, estate agents and employment agencies;
- food/beverage uses including restaurants, cafés, pubs, bars and hot food takeaways; and
- other non-retail services including a wide range of uses, such as hairdressers, dry-cleaners, travel agents, beauty salons and post offices.

4.19 Reigate town centre has the highest concentrations of food/beverage outlets, particularly restaurants/cafés. Most of the other town centres have a reasonable choice of facilities, although the number of pubs/bars, coffee shops and restaurants could be improved in Redhill town centre. Most of the Borough’s hot food takeaway are in Local Centres.

Figure 4.4 Distribution of food/beverage outlets (number of outlets)

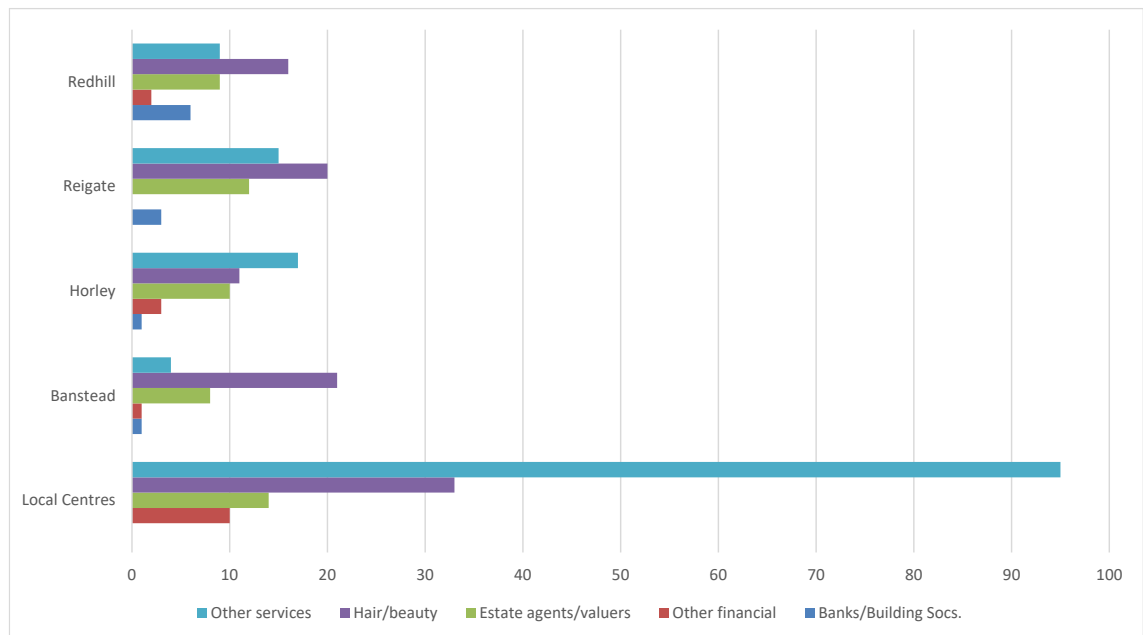


Source: RBBC land use survey July 2023

4.20

All four town centres have a reasonable range of other non-retail services, particularly hair/beauty salons and estate agents, as shown in Figure 4.5. As indicated in Figure 4.2 earlier, the Borough has a higher proportion of financial/professional services and other non-retail services than the UK average. The provision of banks/building societies is mainly concentrated in Redhill and Reigate town centres.

Figure 4.5 Distribution of other non-retail service uses (number of outlets)



Source: RBBC land use survey July 2023

4.21 A more detailed analysis of the mix of services uses in each town centre is shown in the centre health checks in the Appendices.

Summary

4.22 The analysis of the hierarchy of centres in this section indicates the Borough has a well-established network of centres that serve their respective areas. Redhill and Reigate are the only centres with borough-wide catchment areas, but Redhill has the highest shop vacancy rate, above the UK average. The high Redhill vacancy rate included six vacant shops in the Rise Development in 2023. There are now only two available units and two under offer in this development. Redhill will benefit from the improved food and beverage representation in the Rise development and potentially the reoccupation of other vacant units.

4.23 The catchment area of centres overlap to a significant extent, particularly Redhill and Reigate in the central area of the Borough and Tadworth and Banstead in the north. There is a degree of internal competition between centres. The health of the main centres is assessed in more detail in Appendix 2.

4.24 Identifying the hierarchy of centres in future development plans will be important in terms of:

- ensuring the vitality and viability of centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
- directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
- identifying a viable and complementary role and strategy for each centre, recognising their different strengths and potential.

4.25 The network of centres should be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping and leisure patterns.

5.0 Retail and food/beverage capacity

Introduction

- 5.1 This section assesses the quantitative and qualitative need for retail and food/beverage uses within Reigate and Banstead. The National Planning Policy Framework (NPPF) indicates that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping and food/beverage (eating and drinking away from the home).

Assumptions and base data

- 5.2 All monetary values expressed in this study are at 2021 prices, consistent with Experian's base year expenditure figures for 2021, which are based on actual recorded expenditure levels rather than projections.

Study area zones

- 5.3 A household telephone survey was undertaken during November 2023. The primary catchment areas of some centres extends beyond the Borough boundary. The study area is shown in Appendix 1. This study area has been sub-divided into six zones based on postcode sectors to reflect the primary catchment areas of the main centres in the Borough.
- 5.4 The projected population within each zone between 2023 to 2043 is set out in Table 1 in Appendix 3, sourced from Experian. The base year 2023 population within the study area is 278,282. This population is projected to increase to 293,669 by 2043, an increase of +5.5%.

Retail expenditure

- 5.5 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2021 have been obtained.
- 5.6 Experian's latest national expenditure information (Experian Retail Planner Briefing Note 21 – February 2024) has been used to forecast expenditure within the study area. Experian's short-term growth forecast rates during 2023, 2024 and 2025 reflect current economic circumstances, including Covid-19 and the cost of living crisis. The forecast changes between 2023 and 2025 are as follows:
- convenience goods: -3.6%;
 - comparison goods: -1.9%;
 - leisure: -1.0%.
- 5.7 These short-term forecasts reflect post Covid lockdown re-adjustments during 2022 and 2023. Convenience goods expenditure increased during the lockdowns with households eating out less often than before the pandemic. Convenience goods expenditure is forecast to decline during 2023, 2024 and 2025. Comparison goods and leisure expenditure, including eating and drinking out, reduced significantly during the lockdowns. The leisure
-

sector recovered during 2022, but a small decline in forecast during 2023 and 2024. The comparison goods retail sector is expected to decline during 2023 and 2024.

5.8 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's medium and long-term growth average forecasts have been adopted. These longer term forecast reflect Experian's views on the post Covid and cost of living crisis recovery. The growth forecasts are as follows:

- convenience goods: no growth during 2026 to 2030 and +0.1% growth per annum beyond 2030;
- comparison goods: +3.1% per annum growth for 2026 to 2030 and +2.8% per annum beyond 2030; and
- leisure: +1.1% per annum growth for 2026 to 2030 and +0.8% per annum after 2030.

5.9 These growth figures relate to real growth and exclude inflation.

5.10 Experian's latest adjusted deductions for Special Forms of Trading (SFT - i.e. home and online shopping through non-retail businesses) in 2023 are:

- 4.7% of convenience goods expenditure; and
- 22.8% of comparison goods expenditure.

5.11 Experian's projections suggest that these percentage deductions for SFT will increase to 7.4% and 29.7% by 2039, respectively.

5.12 Table 2 in Appendix 3 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2043, excluding SFT. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 4 and food/beverage expenditure is shown in Table 2 in Appendix 5.

5.13 Based on forecast changes in population and per capita spending (excluding SFT), total convenience goods spending within the study area is forecast to increase by +2.6% from £725.95 million in 2023 to £745.18 million in 2043, as shown in Table 3 (Appendix 3).

5.14 Comparison goods spending is forecast to increase by +61.6% between 2023 and 2043, increasing from £895.02 million in 2023 to £1,446.62 million in 2043, as shown in Table 3 (Appendix 4).

5.15 Food and beverage spending is forecast to increase by +23.9% between 2023 and 2043, increasing from £556.04 million in 2023 to £688.83 million in 2043, as shown in Table 3 (Appendix 5).

Growth in Turnover densities

5.16 Experian's Retail Planner Briefing Note 21 - February 2024 indicates comparison goods retail sales floorspace is expected to reduce its average sales density by -1.1% during 2024 and 2025 but will grow in the medium term (+2.6% per annum during 2026 to 2030), and longer term (+2.6% per annum beyond 2030). These forecast increases have been adopted and will absorb much of the future expenditure growth. These growth rates are relatively high compared with historic forecasts but are consistent with the likely high increase in on-

line/home shopping through retail businesses i.e. the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide.

- 5.17 For convenience goods retail, Experian indicates a -0.1% decline in sales densities during 2024 and 2025, but will grow in the medium term (+0.2% per annum during 2026 to 2030) and +0.1% per annum thereafter.
- 5.18 For leisure facilities, including food/beverage floorspace, Experian indicates a -0.8% decline in sales densities during 2024 and 2025; a small average increase of 0.5% per annum during 2026 to 2030; and 0.2% growth per annum in sales densities thereafter.

Base year market shares

- 5.19 The turnover of facilities within Reigate and Banstead is estimated based on the market shares or penetration rates. To assess the capacity for new floorspace, penetration rates have been estimated for shopping and food/beverage facilities based on a household shopper survey undertaken in November 2023.
- 5.20 The market shares for convenience goods and comparison goods shopping are shown in Table 4 in Appendix 3 and Table 4 in Appendix 4, respectively. The market shares for food and beverage expenditure are shown in Table 4 in Appendix 5.
- 5.21 The results of the household shopper survey regarding main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The market shares in Table 4 in Appendix 3 are a combined rate for both main and top up shopping based on a 70:30 split. This 70:30 split is based on Lichfields' experience and is widely accepted in retail studies of this kind.

Table 5.1 Food and grocery trip retention in Reigate and Banstead (% of all trips in each zone)

Zone	Main last trip	Main other trip	Top-up	Combined market share
1 – Reigate	63.4	62.4	88.2	70.7
2 – Redhill	73.9	64.8	85.8	75.5
3 – Horley	51.3	49.0	62.2	54.1
4 – Caterham	13.2	22.4	12.0	14.7
5 – Banstead	29.8	47.7	51.2	39.8
6 – Tadworth	45.5	32.8	45.0	42.8

Source: NEMS household survey results November 2023

- 5.22 Reigate and Banstead retains a relatively high share of convenience goods shopping trips in the central area of the Borough (Zones 1, 2 and 3). The Borough's market shares are much lower in the northern part of the study area (Zones 4, 5 and 6), where a significant proportion of food and grocery trips are attracted to food stores in Croydon Borough, Sutton Borough, Epsom and Ewell and Mole Vale. Facilities in Crawley attract a high proportion of trips from the southern part of the Borough.
- 5.23 These figures indicate that most residents undertake their food and grocery shopping close to where they live albeit predominantly by car for main food shopping trips. The household survey results and distribution of food stores within and surrounding the study area suggest there may be limited potential for Reigate and Banstead to increase its market share of

convenience goods expenditure in the future, but the potential for further convenience goods retail floorspace could arise in areas where there are high levels of trading.

5.24 The market shares for comparison goods shopping in Table 4, Appendix 4 are based on a weighted average for each comparison goods category included within the household survey e.g. clothing/footwear, electrical, furniture, floorcoverings, DIY and health and beauty products. The survey results suggest lower levels of comparison goods expenditure retention for all goods categories within most study area zones, as shown in Table 5.2. The market shares are also higher in the central are of the Borough and much lower in the north and south.

Table 5.2 Non-food comparison trip retention (% of all trips in study area zones – excluding internet shopping)

Zone	Clothing footwear	Domestic electrical	Other electrical	Furniture floor-covering textile	DIY hardware garden	Health beauty	Books stationery	Toys hobbies pets	Other non-food	Combined weighted Market share
1 – Reigate	53.9	61.5	34.7	38.9	83.5	86.0	83.1	65.3	63.3	60.0
2 – Redhill	42.2	38.6	29.1	49.5	72.7	85.6	79.4	67.1	37.3	53.5
3 – Horley	17.4	18.0	21.1	38.5	16.7	69.2	48.0	25.4	26.3	31.3
4 – Caterham	25.8	20.3	17.1	11.0	16.6	15.2	38.6	18.7	21.7	20.1
5 – Banstead	8.5	13.6	3.8	3.6	2.4	32.3	28.1	10.4	14.6	16.7
6 – Tadworth	17.5	21.9	18.3	13.2	15.2	21.5	15.9	10.0	14.9	22.7

Source: NEMS household survey results November 2023

5.25 The results of the household shopper survey regarding eating and drinking away from the home have been used to estimate existing food and beverage expenditure patterns. The market shares in Table 4 in Appendix 5 are a combined rate for both eating out and drinking at pubs/bars are based on an 80:20 split, based on Experian’s local expenditure data.

5.26 The survey results suggest reasonably high levels of expenditure retention within the study area, as shown in Table 5.3. These high retention rates suggest retail and food/beverage facilities in the Borough are generally meeting the needs of most residents and are competing effectively with other destinations outside the Borough.

5.27 The survey results suggest lower levels of food/beverage expenditure market share than for convenience goods shopping but higher levels of market share than comparison goods shopping.

Table 5.3 Food and beverage trip retention (% of all trips in study area zones)

Zone	Eating out	Drinking away from home	Combined market weighted share
1 – Reigate	71.4	65.0	70.1
2 – Redhill	68.4	70.7	68.9
3 – Horley	65.5	89.0	70.2
4 – Chipstead	37.8	31.5	36.5
5 – Banstead	49.9	43.5	48.6
6 – Tadworth	46.5	53.8	47.9

Source: NEMS household survey results November 2023

Capacity for convenience goods retail floorspace

- 5.28 Based on the market shares calculated from the November 2023 household survey results, available convenience goods expenditure attracted to Reigate and Banstead in 2023 is shown in Table 4 in Appendix 3. This expenditure has been projected forward to 2028, 2033, 2038 and 2043, and is summarised in Table 11 Appendix 3. Convenience goods expenditure available to facilities within Reigate and Banstead is expected to increase from £340.05 million in 2023 to £349.67 million in 2043. This increase is due to population growth. A breakdown for facilities in each zone is set out in Table 5.4.

Table 5.4 Convenience goods base year turnover in 2023 (household survey based turnover)

Zone	Turnover £M
1 – Reigate	76.78
2 – Redhill	81.28
3 – Horley	50.15
4/5 – Banstead/Chipstead	64.96
6 - Tadworth	66.86
Total	340.05

Source: Table 11 in Appendix 3.

- 5.29 The benchmark turnover of food stores and convenience shops within the Borough is calculated in Table 10 in Appendix 3. The benchmark turnover is based on the sales area within each store and the respective company average sales densities. This turnover is not necessarily the actual turnover of the store, but it provides a useful benchmark to assess how well existing facilities are trading.
- 5.30 The combined benchmark turnover of identified food stores and other convenience goods shops within the Borough is estimated to be £287.82 million as shown in Table 10 in Appendix 3. Based on these estimates, convenience goods shopping facilities within the Borough are estimated to be trading about 18% above the national average. However, there are variations across the Borough with convenience goods retail facilities trading particularly well in Reigate and Banstead.
- 5.31 Average convenience goods expenditure per capita (£2,609 excluding SFT in 2023) is 10.8% higher in the study area than the UK national average (£2,354). Average convenience goods expenditure per capita is particularly high in Zone 1 – Reigate (+18%) and Zones 5 and 6 – Banstead and Tadworth (+15%). These above average levels of expenditure are due to the generally higher levels of affluence in these areas, which fuel both increased levels of

sales volume (number of products) and also the purchase of higher value goods. These levels of affluence help to explain the high trading levels in Reigate and Banstead.

- 5.32 The purchase of higher value goods does not necessarily result in a need for more sales floorspace because this does not generate more trips or demand for more goods (i.e. sales volume). To reflect the higher value of goods, rather than the volume of goods purchased, it is reasonable to assume convenience goods sales floorspace in the Reigate and Banstead zones can adequately trade at a higher average sales density than the national average. The retail capacity assessment makes an allowance of +15% trading above the national average in these two areas, to reflect the higher value of goods purchased.
- 5.33 Table 11 in Appendix 3 subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus/deficit expenditure that may be available for new development in the future. The deficit/surplus expenditure projections are converted into floorspace estimates in Table 12 in Appendix 3 based on a combined company average sales density of £12,250 per sq.m net of the main food store operators. The results are summarised in Table 5.5.

Table 5.5 Convenience goods floorspace capacity (sq.m gross) - cumulative

Zone	2028	2033	2038	2043
1 – Reigate	2,270	2,270	2,330	2,390
2 – Redhill	-100	-70	30	140
3 – Horley	490	510	600	670
4/5 – Banstead	1,670	1,640	1,670	1,700
6 – Tadworth	-210	-240	-210	-190
Total	4,120	4,110	4,420	4,710

Source: Table 12 in Appendix 3.

Qualitative need

- 5.34 Convenience goods retail provision in the Borough is set out in Table 10 in Appendix 3. Convenience goods sales floorspace totals nearly 24,700 sq.m net. Collectively designated town and centres in the Borough have 107 convenience goods outlets including food stores operated by multiple retailers and smaller independent shops. Residents across the Borough have reasonable access to a range and choice of food stores and there are no obvious areas of deficiency in food store provision, which reflects the high expenditure retention rates highlighted in Table 5.3.
- 5.35 Main shopping trips are generally made once a week or less often. The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large superstores, defined as over 2,500 sq.m net or more, are the usual destination for these types of shopping trip. There are three superstores (over 2,500 sq.m net) in the Borough i.e. Morrison's in Reigate (2,713 sq.m net), Sainsbury's in Redhill (3,207 sq.m net) and Asda in Tadworth (4,778 sq.m net). Sainsbury's and Tesco stores in Tandridge, Epsom and Mole Valley are also reasonably accessible for residents in the Borough.
- 5.36 In addition to these superstores, there is good choice of other large stores/supermarkets and smaller convenience stores in the Borough. However, the discount food sector is relatively under-represented with only Lidl in Horley.

Capacity for comparison goods floorspace

- 5.37 Available comparison goods expenditure has been projected to 2028, 2033, 2038 and 2043 and is summarised in Table 11 in Appendix 4. Comparison goods expenditure available to facilities in Reigate and Banstead is expected to increase from £280.83 million in 2023 to £455.74 million by 2043. A breakdown for facilities in each zone is set out in Table 5.6.

Table 5.6 Comparison goods base year turnover in 2023 (household survey based turnover)

Zone	Turnover £M
1 – Reigate	85.95
2 – Redhill	106.08
3 – Horley	34.24
4/5 – Banstead	28.14
6 - Tadworth	26.43
Total	280.83

Source: Table 11 in Appendix 4.

- 5.38 Table 10 in Appendix 4 indicates comparison goods outlets in town and local centres and out of centre retail warehouses have a total floorspace of 57,238 sq.m gross. The total sales floorspace including comparison goods sales in food stores is estimated to be 47,054 sq.m net. The estimates suggest an average turnover density of £5,968 per sq.m net. Based on Lichfields' recent experience average sales densities for comparison goods sales floorspace can vary significantly range from about £4,000 per sq.m net to over £8,000 per sq.m net. Comparison goods floorspace in the Borough appears to be trading satisfactorily.
- 5.39 Table 11 in Appendix 4 subtracts the turnover of existing floorspace plus an allowance for sales density growth. The projections suggest future growth in expenditure will be partially offset by growth in sales densities i.e. existing retail businesses will absorb expenditure growth. This assumption is consistent with Experian's projected non-store sales taken by retail businesses. The growth in sales densities will in part be fuelled by on-line sales and click and collect, which will not directly affect the need for additional floorspace. The deductions made for SFT only relate to non-store sales through non-retail businesses.
- 5.40 In 2033 there is a projected small expenditure surplus of +£3.24 million, increasing to £6.84 million in 2038. By 2043 there is a surplus of +£15.07 million. These projections suggest growth in turnover densities will absorb most of the future expenditure growth. The expenditure projections have been converted into floorspace estimates Table 12 in Appendix 4. The results are summarised in Table 5.7.

Table 5.7 Comparison goods floorspace capacity (sq.m gross) - cumulative

Zone	2028	2033	2038	2043
1 – Reigate	70	160	270	530
2 – Redhill	130	290	510	930
3 – Horley	30	100	170	310
4/5 – Banstead	-10	-	30	100
6 - Tadworth	-10	-	10	90
Total	210	550	990	1,960

Source: Table 11 in Appendix 4.

Qualitative need

- 5.41 Comparison goods retail provision in the Borough is set out in Table 10 in Appendix 4. Collectively town and local centres in the Borough have 276 comparison goods outlets. This includes a mix of national multiples and small independent shops. The Borough has a limited provision of retail warehouses, as set out in DMP Policy RET6, including Homebase in Reigate and B&Q, Halfords and Pets at Home in Redhill.
- 5.42 As indicated in Section 3, most centres have a reasonable proportion of comparison good retail uses, but the leakage of higher order comparison goods expenditure to larger centres such as Bluewater, Crawley, Croydon, Epsom, Kingston and Sutton is relatively high. The analysis of centres in Appendix 2 indicates the range and choice of comparison goods shops varies from centre to centre. Most categories of comparison goods shops are available in Reigate and Redhill but the choice within some categories is limited. The range and choice of comparison goods shops in the other smaller centres is more limited.
- 5.43 Overall, the accessibility for residents in the Borough to a range and choice of comparison goods shopping destinations is reasonable, taking into account accessibility to larger centres in neighbouring authorities.

Capacity for food/beverage floorspace

- 5.44 Available food and beverage expenditure has been projected forward to 2028, 2033, 2038 and 2043, and is summarised in Table 11 in Appendix 5. The amount of expenditure attracted to Reigate and Banstead is expected to increase from £304.23 million in 2023 to £377.52 million in 2043. A breakdown for facilities in each zone is set out in Table 5.8.

Table 5.8 Food and beverage base year turnover in 2023 (household survey based turnover)

Zone	Turnover £M
1 – Reigate	107.17
2 – Redhill	48.27
3 – Horley	37.98
4/5 – Banstead	69.87
6 - Tadworth	40.93
Total	304.23

Source: Table 11 in Appendix 5.

- 5.45 Table 10 in Appendix 5 indicates there are 201 food and beverage outlets in town and local centres in the Borough with total floorspace of 28,228 sq.m gross. The estimates suggest an average turnover of about £1.5 million per outlet, although there are other outlets located outside of designated centres, which would reduce this average. Nevertheless food and beverage outlets in the Borough appear to be trading satisfactorily.
- 5.46 Table 11 in Appendix 5 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure available for new development. In 2033 there is an expenditure surplus of +£28.72 million. Continued population and expenditure growth creates an expenditure surplus of £43.71 million in 2038 increasing to £59.96 million by 2043. Floorspace capacity projections are shown in Table 12 in Appendix 5 and summarised in Table 5.9 below.

Table 5.9 Food and beverage floorspace capacity (sq.m gross) - cumulative

Zone	2028	2033	2038	2043
1 – Reigate	900	1,700	2,540	3,440
2 – Redhill	410	800	1,200	1,640
3 – Horley	310	630	970	1,330
4/5 – Banstead	500	970	1,490	2,020
6 - Tadworth	300	570	850	1,150
Total	2,420	4,680	7,050	9,570

Source: Table 11 in Appendix 5.

Qualitative need

- 5.47 Food/beverage provision in the Borough is set out in Table 10 in Appendix 5. Collectively the town and local centres in the Borough have over 200 food/beverage outlets including 110 restaurants/cafés; 13 coffee shops, 23 pubs/bars and 54 hot food takeaways. These centres provide a good range and choice of outlets. Reigate town centre has the strongest provision of outlets serving the evening economy. Overall, the accessibility for residents in the Borough to a range and choice of food/beverage outlets is good.

Operator space requirements

- 5.48 The Requirements List publishes potential space requirements for multiple retail and food/beverage operators. The current (March 2024) list of operators' published information suggests they may have space requirements in the Borough are shown in Tables 5.8 to 5.10.
- 5.49 Some (such as Aldi, Lidl, M&S and The Range) have space requirements listed for more than one centre in the Borough, which indicates their requirement may relate to a general area of search rather than a specific town centre. In most cases it is unlikely more than one outlet is required in the Borough. Furthermore, some of these listed requirements are likely to be generic interest in centres of a similar size across the region rather than specifically in the Borough, therefore the total number of requirements and amount of floorspace outlined above should be treated with caution.

Table 5.10 Convenience goods retail operator space requirements in Reigate and Banstead

Operator	Floorspace sq.ft min/max	Area of search
Aldi -supermarket	18,000 – 20,000	Redhill, Reigate
Lidl – supermarket	18,000 – 26,000	Banstead, Horley, Redhill, Reigate, Tadworth
Majestic Wine	2,500 – 5,000	Banstead
M&S Food	12,500 – 25,000	Horley, Reigate, Tadworth
Ole & Steen - bakery	1,500 – 3,000	Banstead, Reigate

Source: The Requirements List (March 2024)

Table 5.11 Comparison goods retail operator space requirements in Reigate and Banstead

Operator	Floorspace sq.ft min/max	Area of search
British Heart Foundation – charity shop	1,500 - 14,000	Redhill
Bonmarche – clothing	2,000 - 3,000	Horley
Calendar Club – calendar retailer	800 – 2,000	Redhill
CP Hart & Sons - bathrooms	1,500	Reigate
Deichmann – shoes/sportswear	4,000 - 6,000	Redhill
Edinburgh Woollen Mill	1,800 – 3,000	Reigate
Hobbs – women’s clothes	2,500 – 3,000	Reigate
Magnet - kitchens	8,000 – 15,000	Horley
Matalan – fashion/homeware	15,000 - 25,000	Redhill, Reigate
PDSA – charity shop	1,000 - 3,000	Redhill
Salvation Army – charity shop	2,000- 10,000	Reigate
Savers – health and beauty	2,000 – 3,500	Banstead, Horley, Reigate
Sense - charity shop	1,200 - 6,000	Redhill
Sussex Beds	2,000 – 5,000	Banstead, Redhill, Reigate
The Range – home, garden and leisure	25,000 – 40,000	Horley, Redhill
The White Company – clothing and home	1,000 – 2,000	Reigate
The Works - discount retail	1,500 – 2,000	Banstead, Horley, Reigate
Topps Tiles	2,500 – 8,000	Banstead
Vinegar Hill – home and fashion	1,000 – 1,500	Reigate
VPZ – electronic cigarettes	500 – 1,500	Redhill
Wex – camera/photographic equipment	2,000 - 4,000	Redhill, Reigate

Table 5.12 Food/beverage operator space requirements in Reigate and Banstead

Operator	Floorspace sq.ft min/max	Area of search
Burger King – fast food	1,600 – 2,600 sq.ft	Horley
Camile Thai – Thai food	900 – 1,500 sq.ft	Redhill
Dallas Chicken – fast food	750 – 1,250 sq.ft	Horley, Redhill, Reigate
Dim t – Asian restaurant	3,000 - 4,500	Banstead, Reigate
Innkeeper's Lodge pub/restaurant/hotel	NK	Redhill
KFC - fast food restaurant	1,800 - 2,500	Redhill, Tadworth
McMullen – pubs	2,500 – 5,000	Reigate
Megan’s – Mediterranean restaurant	1,800 – 5,000	Reigate
Mountain Pub Company	3,000	Horley
Papa Johns – takeaway	1,000	Horley
Premium Country Pubs	NK	Redhill
Taco Bell – fast food	750 – 2,500	Horley
Wildwood – restaurant	3,000 – 4,500	Banstead, Reigate

Source: The Requirements List (March 2024)

5.50

In total, there are 40 retail and food/beverage operators listed as having potential space requirements in the Borough with a potential total floorspace requirement of at least 151,400 sq.ft gross (or 14,000 sq.m), as follows:

- Convenience goods retailers 5 (over 52,500 sq.ft gross)
- Comparison goods retailers 21 (over 78,800 sq.ft gross)
- Food/beverage operators 13 (over 20,100 sq.ft gross).

6.0 **Leisure, entertainment and cultural uses**

Introduction

6.1 This section assesses the need for other main town centre uses including commercial leisure, entertainment and cultural uses i.e. cinema/multiplex, tenpin bowling, bingo, theatres, nightclubs and private health and fitness clubs. Main town centre uses, as defined within the NPPF glossary, exclude less intensive sports and recreation uses such as swimming pools, sports halls and sports pitches, and therefore the need for these uses has not been assessed in this study.

6.2 Residents in Reigate & Banstead Borough have a relatively good range of commercial leisure and entertainment uses within the authority area and within neighbouring authorities. Public transport access to facilities within Central London and Croydon also provides additional opportunities for leisure, entertainment and cultural trips.

Leisure, entertainment and cultural expenditure

6.3 Experian's projections and local expenditure data for the Reigate and Banstead study area indicates the resident population generates £126.9 million in 2023 (an average of about £456 person) on selected cultural, recreational and sporting services, including:

- cinema admissions;
- live entertainment i.e. theatre/concerts/shows;
- museums, theme parks, houses and gardens;
- admissions to clubs, dances, discos, bingo;
- other miscellaneous entertainment;
- subscriptions to sports and social clubs; and
- leisure class fees.

6.4 Leisure, entertainment and cultural expenditure has been projected to 2028, 2033, 2038 and 2043 adopting Experian's recommended leisure expenditure growth rates (Retail Planning Briefing Note 21 – February 2024). Taking population growth into account leisure expenditure is projected to increase by 25.4% from £126.9 million in 2023 to £157.2 million in 2043.

6.5 Not all leisure/cultural expenditure from study area residents is spent in the Borough. The household survey results have been adopted to estimate the household participation rates and the retention of leisure trips within the study area, as shown in Table 5.1. Less than 6% of households do not participate in any of the nine leisure activities explored by the household survey.

6.6 The participation and retention rates vary significantly for each leisure activity. Many residents travel outside the study area e.g. to Central London, Croydon, Sutton and Crawley for some leisure activities. The retention rate is highest for trips to health/fitness facilities but much lower for museums/art galleries and nightclubs/live music venues. These results suggest Reigate and Banstead residents are prepared to travel further for theatres, museum/art gallery and nightclub/live music venue activities. Facilities in Central London

attract a high proportion of museum/art gallery (85%), theatre (63%) and nightclub/live music venue trips (45%).

Table 6.1 Leisure, entertainment and cultural participation and trip retention (% of households in the study area)

Activity	% study area households participating	% trips attracted to Reigate & Banstead Borough
Cinema	60.7	31.1
Theatre	55.4	8.8
Nightclubs / live music venues	20.9	3.9
Bingo	3.3	0.0
Gyms / health and fitness club	35.5	50.2
Tenpin bowling / gaming	25.5	17.8
Indoor / soft play	15.1	50.2
Trampoline parks	14.5	1.4
Climbing/escape rooms	16.5	27.3
Museums / art galleries	43.8	0.0

Source: NEMS household survey results November 2023

- 6.7 The household survey results and Experian's expenditure figures suggest facilities in Reigate and Banstead attract not more than 30% of leisure, entertainment and cultural expenditure within the study area, which is about £38.1 million in 2023. This retained leisure expenditure is projected to increase to £40.2 million in 2028; £42.5 million in 2033; £44.8 million in 2038 and £47.2 million in 2043.
- 6.8 Based on Lichfields' experience, leisure floorspace normally trades on average around £2,500 per sq.m gross, which is projected to increase to £2,517 per sq.m gross in 2028; £2,558 per sq.m gross in 2033; £2,584 in 2038 and then to £2,610 per sq.m in 2043, based on Experian's projected growth in leisure sales densities.
- 6.9 If leisure/cultural expenditure attracted to the Borough increased by £2.1 million by 2028; £4.4 million by 2033, £6.7 million by 2038 and then £9.1 million in 2043, as indicated above, then this additional expenditure could support about 800 sq.m gross of new commercial leisure and cultural floorspace by 2028, increasing to about 1,700 sq.m gross by 2033; 2,600 sq.m by 2038 and then to 3,500 sq.m gross by 2043.
- 6.10 This analysis provides a broad brush global floorspace capacity analysis. A more detailed sector by sector assessment is set out in the remainder of this section.

Cinemas

- 6.11 Cinema admissions in the UK reached a peak of 1.6 billion trips in 1946, but the number of trips declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s dropping to only 54 million trips in 1984 but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 176 million in 2019 (Source: British Film Institute). Cinema trips did not increase significantly between 2002 and 2019, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The national average visitation rate was about 2.6 trips per person per annum, before the Covid crisis. The number of trips during the Covid-19 crisis reduced significantly. The latest 2022 figures

indicate just over 117 million cinema trips were made in the UK (about 1.7 trips per person), still 33% below pre-Covid levels (176 million). This continued reduced visitation rate is probably due to the expansion of streaming services during and after Covid lockdowns and the effects of the cost of living crisis.

- 6.12 The cinema assessment for Reigate & Banstead Borough assumes trip levels comparable with the UK average at both post and pre-Covid levels, i.e. an average of between 1.7 and 2.6 trips per person per annum.
- 6.13 The UK Film Association identifies 846 cinema facilities with 4,637 screens and 790,000 seats in the UK in 2022. Lichfields' national CINESCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average (based on pre-Covid trips rates) was about 38,000 cinema trips per annum for each cinema screen or 190 trips per annum for each seat available.
- 6.14 The Reigate and Banstead study area population is 278,282 in 2023, which based on the national averages above, would generate between 473,000 to 723,000 cinema trips per year. These trips can theoretically support between 12 to 19 cinema screens or 2,489 to 3,805 cinema seats. However, not all cinema trips will be attracted to facilities in the Borough. Cinemas surrounding the Borough attract a significant number of trips, therefore the Borough's theoretical capacity will be much lower.
- 6.15 Based on the current cinema market share for the Borough (31.1%), as suggested by the household survey results, between 4 to 6 screens or 800 to 1,200 cinema seats could be supported based on the UK pre and post Covid average visitation rate (1.7 or 2.6 trips per person).
- 6.16 Reigate & Banstead Borough has three full-time cinemas:
- Harlequin Theatre and Cinema in Redhill – one screen (91 seats);
 - The Light in Redhill – six screens (514 seats);
 - Everyman in Reigate – two screens (282 seats).
- 6.17 The Harlequin Theatre and Cinema in Redhill is currently closed and it is unclear whether it will reopen in the future. Nevertheless, this existing provision (9 screens with 887 seats) and the base year trip estimates suggest there is a reasonable balance between supply (screen/seats) when compared with demand (trips), based on the lower post Covid visitation rates. The higher pre-Covid visitation rate implies an under-supply of about 300 seats.
- 6.18 Population within the Reigate and Banstead study area is projected to increase from 278,282 to 293,669 by 2043, which could generate an additional 26,000 to 40,000 cinema trips. These additional trips (higher figure) could in theory support one cinema screen or 210 seats. There could be scope for a small boutique cinema. However, existing cinema provision within and surrounding Boroughs may limit operator demand for a new facility in the study area. Furthermore, the longer-term impact of Covid-19 and growth in home viewing on the number of cinema trips may reduce this theoretical capacity if the average visitation rate does not return to the pre-Covid UK average of 2.6 trips per person.
-

Theatres, nightclubs, live music and other cultural activities

- 6.19 The household survey results indicate a relatively high proportion (about 55%) of respondents in the study area visit theatres. Nearly 44% visit museums/art galleries and about 21% visit nightclubs/live music venues.
- 6.20 The UK Theatre and Society of London Theatres (SOLT) indicated their member organisations (over 200) pre-Covid presented nearly 63,000 performances attracting over 34.35 million tickets visits, generating ticket revenue of £1.28 billion in 2018. The average ticket revenue per venue was £5.7 million. The UK average attendance per performance was 545.
- 6.21 Experian's local expenditure data indicates the Reigate and Banstead study area generated £25.3 million on live theatre, concerts and shows in 2023, which is projected to increase to £31.3 million in 2043. Based on the average ticket revenue per venue (£5.7 million) the Reigate and Banstead study area population currently generates theoretical demand for four venues. This theoretical demand could increase to five venues in 2043. However, the household survey results suggests the Borough attracts less than 9% of theatre trips. About 63% of participating households visit theatres in Central London/the West End.
- 6.22 The Borough has three main theatre venues:
- Harlequin Theatre and Cinema in Redhill;
 - Archway Theatre in Horley; and
 - Courtyard Theatre in Chipstead.
- 6.23 As indicated above, the Harlequin Theatre is currently closed, but the existing provision is above the theoretical demand generated by the study area, based on the current market share of less than 9%, which suggests there is limited potential for new theatre facilities.
- 6.24 The nightclub sector has struggled in recent years and has been significantly affected by the Covid pandemic. Even before Covid-19, IBISWorld (providers of global industry research) suggested these venues have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing.
- 6.25 The household survey results suggest about 21% of households visit nightclubs/music venues and of these participating households less than 4% of trips generated by the study area are attracted to facilities in the Borough.
- 6.26 Experian suggests leisure expenditure on admissions to clubs, dances, discos etc was only £2.6 million in 2021 within the Reigate and Banstead study area, which should have recovered to £3.2 million in 2023. This low level of expenditure and good access to nightclub/live music venues in Central London are likely to limit demand for additional facilities in the Borough.
- 6.27 Experian's local expenditure data indicates the Reigate and Banstead study area generated £15.5 million on museums, theme parks, houses and gardens in 2021 which should have
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recovered to about £19.4 million in 2023, which is projected to increase to £24 million in 2043, an additional £4.6 million.

- 6.28 The household survey results suggest 44% of households visit museums/ art galleries, but of these participating households none of the trips generated by the study area are attracted to Reigate & Banstead Borough. Most participating households are attracted to facilities in Central London.
- 6.29 The analysis above suggests there is no clear qualitative or quantitative need for additional theatre, music/nightclub or cultural provision. However, there may be potential to increase the Borough's market share and attract more demand from tourist visitors if provision and the marketing of existing facilities were improved particularly in relation to museums/art galleries.

Health and fitness clubs

- 6.30 The 2019 State of the UK Fitness Industry Report revealed that the health and fitness industry was continuing to grow pre-Covid. The latest 2022 report suggests the market value is now around 2018 levels. In 2019 there were more than 10.4 million fitness members in the UK and the industry was worth £5 billion, with a participation rate of 15.6%. The number of members dropped to 9.9 million in 2022, with a participation rate of 14.6%. The number of clubs reduced by 176. The household survey results indicate over 35% of households visit health and fitness gyms, which is higher than the national average participation rate of just over 15%.
- 6.31 The Sport England/Active Places data indicates that there are only 11 registered health and fitness facilities in the Borough. The Reigate & Banstead Borough Council Sports Facility Study – October 2022 identified two further facilities. These 13 facilities provide 728 fitness stations, as shown in Table 5.2

Table 6.2 Health and fitness facilities in Reigate & Banstead Borough

Facility	Number of fitness stations	Type of access
Donyngs Leisure Centre, Redhill	172	Pay and Play
The Gym Group, Redhill	170	Registered Membership use
One Premium Fitness, Reigate	70	Pay and Play
Horley Leisure Centre	68	Registered Membership use
Tadworth Leisure and Community Centre	60	Pay and Play
YMCA, East Surrey, Redhill	50	Registered Membership use
Oakwood Sports Centre, Horley	26	Registered Membership use
Netherne Leisure Centre, Netherne	25	n/a
The Fitness Zone, Reigate	25	Registered Membership use
Reigate College, Reigate	23	Private Use
St Bede's School, Redhill	22	Registered Membership use
Go Fitness and Wellbeing, The Belfry	12	n/a
Reigate Squash Club, Reigate	5	Sports Club / Community Assoc.
Total	728	

Source: Sport England January 2024 and RBBC Sport Facilities Study – October 2022.

- 6.32 The current population in the Reigate and Banstead study area is 278,282. However, the household survey results suggest the Borough attracts about 50% of gym trips in the study area equating to a catchment population of about 139,000 in 2023. Based on this current estimated catchment population (139,000) there is an average of about 5 fitness stations per 1,000 people.
- 6.33 Within the South East region there are 1,275 Sport England registered health and fitness facilities with 73,203 fitness stations (average of 57 stations per facility). This existing provision equates to about 7.9 registered fitness stations per 1,000 people in the Region. Reigate and Banstead estimated catchment population (139,000) could generate demand for 1,098 fitness stations, based on this regional average. These figures suggest Reigate & Banstead Borough may have a current under provision of health and fitness facilities i.e. 370 fitness stations. This additional under-supply could support two large facilities (150 fitness stations each) or four medium sized facilities (80 fitness stations each). The Reigate & Banstead Borough Council Sports Facility Study – October 2022 identified a smaller shortfall of 94 workstations, which is equivalent to one medium sized facility.
- 6.34 Notwithstanding the extent of the current under-supply of fitness stations, demand for additional facilities within Reigate and Banstead should arise from future population growth. Population within the study area is projected to increase to 293,669 by 2043, an additional +15,387 people. Based on the regional average of 7.9 fitness per 1,000 people, this population growth could support about 122 fitness stations, of which half could be provided in the Borough based on the current market share. Assuming a minimum current under-provision of 94 fitness stations there could be demand for 216 fitness station by 2043, about three medium sized facilities.
- 6.35 The Requirements List suggests David Lloyd could be looking for new health and fitness facility (4,000 to 6,000 sq.ft) potentially in Reigate and Horley.

Tenpin bowling and other indoor leisure innovations

- 6.36 Repurposed space in town centres has provided new opportunities for new leisure innovations. Vacated premises have been reconfigured and reused for trampolines, climbing, indoor golf, escape rooms etc. These and other innovations are likely to continue in the future because landlords will adopt a flexible approach to respond to arising opportunities.
- 6.37 The household survey results indicate about 26% of households visit ten-pin bowling/gaming facilities, but most of these trips are attracted to bowling facilities outside the Borough. The Borough's market share of tenpin bowling trips is less than 18%. The Light in Redhill is the only tenpin bowling facility in the Borough with 7 lanes.
- 6.38 Other tenpin bowling destination mentioned by household survey respondents were:
- Hollywood Bowl, Crawley Leisure Park (40%);
 - Valley Park Leisure Complex, Croydon (19%); and
 - Hollywood Bowl, Surbiton (18%).
- 6.39 The Reigate and Banstead study area's future 2043 population (293,669) can theoretically support 24 lanes, based on the national average of one lane per 12,000 people. If the
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Borough could retain 50% of trips generated by the study area population then about 12 lanes could be supported, compared with the existing provision of 7 lanes. This small number of additional lanes (up to 5 lanes) could be supported within a mixed activity leisure facility.

- 6.40 Indoor trampoline centres are a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This format first seen in America has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce in 2014.
- 6.41 Trampoline centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts for all ages and abilities, as well as an arcade and party rooms.
- 6.42 The household survey results indicate 14.5% of respondents in the study area visit trampoline centres, 15.1% visit indoor soft play facilities and 16.5% visit climbing/escape room facilities. Trampoline destinations mentioned by households participating in this activity were as follows:
- Oxygen, The Colonnades, Purley Way, Croydon (49%);
 - AirHop Trampoline Park, Guildford (17%); and
 - Sutton Sports Village (16%).
- 6.43 The Requirements List suggests Jumpin could be looking for a trampoline park of 15,000 to 40,000 sq.ft in the Redhill and Reigate area.
- 6.44 Climbing/escape room destinations mentioned by participating households were as follows:
- The Light, Redhill (16%);
 - Gatwick Escape Rooms, Horley (14%);
 - Yellow Spider Climbing, Oaks Sports Centre, Carshalton (11%);
 - Tulleys Farm Escape Rooms, Crawley (7%);
 - Volume 1 Climbing, East Grinstead (5%).
- 6.45 The main indoor soft play destinations in the Borough mentioned by participating households were as follows:
- Wacky Kingdom Soft Play Centre/Redhill town centre (24%);
 - Donyngs Leisure Centre, Redhill (6%); and
 - Lets Explore Soft Play/Horley town centre (5%).
- 6.46 There may be potential scope for further provision of these types of leisure facilities in the Borough, but these innovations are still evolving and its potential for continued growth is unclear. The strategy for the Borough should be flexible to respond to any emerging demand from leisure operators.
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Bingo, games of chance and gambling

- 6.47 Gala (now Buzz Bingo) and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.
- 6.48 The Gambling Commission indicates there are 646 bingo facilities in Great Britain (2020) and 156 casinos. This equates to approximately one bingo facility per 75,000 adults, and one casino per 330,000 adults.
- 6.49 The household survey results indicate only 3.3% of respondents in the study area visit bingo facilities, below the UK average participation rates of around 5%. Most of these participating households visit Buzz Bingo in Crawley or Mecca Bingo in Morden.
- 6.50 The adult population in the Reigate and Banstead study area (about 235,000 in 2023) in the study area is theoretically capable of supporting about three bingo facilities but less than one casino, based on the UK averages. The relatively low participation rate (3.3%) and the continued growth in online bingo and gambling will restrict operator demand in the Borough, which suggests there is no need to identify a site for a new facility.

Conclusions on commercial leisure and other town uses

- 6.51 The leisure, entertainment and cultural sectors are fragmented and innovative. There are many activities that could be promoted e.g. museums, art galleries, exhibition space, tourist attractions. The analysis suggests the scope for some traditional leisure activities often found in town centres may be limited e.g. cinemas and theatres, but new emerging leisure activities such as escape rooms and virtual golf centres should provide more potential. The representation of these emerging uses is likely to increase. Given the fragmented nature of these sectors it is difficult to precisely quantify the potential demand for these uses over the next 15 years.
- 6.52 In global terms future expenditure growth could support new commercial leisure and cultural floorspace (cumulative) in the Borough of:
- about 1,700 sq.m by 2033;
 - about 2,600 sq.m by 2038; or
 - about 3,500 sq.m by 2043.
- 6.53 This additional floorspace could include:
- a small boutique cinema;
 - 3 medium sized health and fitness facilities (about 200 new fitness stations in total);
 - new leisure innovations e.g. trampolines, indoor climbing, escape rooms, virtual sport activities; and
 - small scale tourist attractions/cultural facilities.
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- 6.54 The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities. The opportunities to reoccupy vacated retail space should be considered.

7.0 Policy implications

Accommodating growth and change

National guidance

- 7.1 For planning policies, local authorities are required to support the role of town centres and the three main areas that town centre policies should focus on are:
- defining a network and hierarchy of centres, allowing them to grow and diversify;
 - defining the extent of centre boundaries and primary shopping areas, making clear the uses permitted in these locations; and
 - allocating a range of suitable sites to meet the scale and type of development needed for at least ten years ahead, sites should be allocated consistent with the sequential approach i.e. town centre, then edge-of-centre followed by accessible out-of-centre sites.
- 7.2 The NPPF acknowledges the rapid changes that are affecting town centres and diversification is key to their long-term vitality and viability. Accordingly, planning policies should clarify the range of uses permitted, as part of a positive strategy for the future of each centre.
- 7.3 The NPPF's presumption in favour of sustainable development remains. For plan-making this means that plans should positively seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change. It is widely accepted that very long-term projections have inherent uncertainties. In response to these uncertainties, local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses over a minimum ten-year period reflects the complexities in bringing forward town centre development sites. In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required.
- 7.4 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will need to be assessed against the sequential and impact tests.
- 7.5 The sequential test in the NPPF indicates main town centre uses should locate in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered (para. 91). When considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge of centre sites are fully explored (para. 92).
- 7.6 The NPPF states that local planning authorities should require an impact assessment for applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500
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sq.m (para. 94). Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact, it should be refused (para. 95).

- 7.7 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. On-line shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centres has become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.
- 7.8 As set out in Section 2, the Use Classes Order (UCO) was significantly amended in September 2020, including the new Class E that includes retail and many other commercial uses, and changes to permitted development rights were introduced in August 2021. These changes will have significant implications for shopping planning policies, restricting the ability of local planning authorities to control the mix of uses. The revised NPPF no longer includes references to shopping frontages.
- 7.9 The expenditure projections in this study exclude home shopping made through non-retail businesses, because special forms of trading (sales via the internet, mail order, stalls and markets) is subtracted from the expenditure projections and the assessment of need relates specifically to physical floorspace only. The assessment adopts Experian's latest information and projections and assumes that special forms of trading will increase in the future, including the growth of internet shopping.

Floorspace capacity projections

- 7.10 The Reigate & Banstead Local Plan: Development Management Plan (Table 4) sets out retail floorspace capacity figures for comparison and convenience goods retail. In total 12,900 sq.m of comparison goods floorspace was identified as needed, but no significant quantitative need was identified for convenience goods retail. The 12,900 sq.m floorspace figure relates to net sales floorspace rather than gross. These floorspace projections need to be updated and rolled forward.
- 7.11 The floorspace projections in the DMP Table 4 were taken from the Reigate & Banstead Retail Needs Assessment 2016 and the projections were for the period up to 2027. The 2016 capacity assessment did not quantify the need for food/beverage floorspace.
- 7.12 The updated assessment of the potential for new retail, food/beverage floorspace in this report suggests there is modest medium-term scope for new development within the Borough. Tables 7.1, 7.2 and 7.3 below summarise the floorspace requirements in the Borough up to 2033, 2038 and 2043 (cumulative).
- 7.13 These projections assume facilities in Reigate & Banstead Borough will maintain their market share of expenditure in the future. This approach recognises that additional development within the Borough could help to increase the area's market share, but this increase will be counter-balanced by development within competing centres. The household survey results indicate the Borough retains a reasonably high level of expenditure and a significant increase in market shares is unrealistic and unnecessary. Conversely a significant reduction in market share could undermine the vitality and viability of town centres. A balanced and sustainable approach has been adopted and taken forward in the next Local Plan.
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7.14 In the next ten years, Table 7.1 indicates there is a combined projected requirement for all main centres of 9,340 sq.m gross of retail and food/beverage floorspace in 2033. Most of this projection relates to convenience goods retail and food/beverage floorspace rather than comparison goods retail. The availability of existing vacant floorspace to accommodate this short to medium terms floorspace requirement needs to be considered. The combined floorspace requirement increases to 12,460 sq.m gross in 2038 and then to 16,240 sq.m gross in 2043.

Table 7.1 Retail and food/beverage floorspace projections up to 2033 (sq.m gross) – cumulative

Zone	Convenience goods retail	Comparison goods retail	Food/ beverage	Total
1 – Reigate	2,270	160	1,700	4,130
2 – Redhill	-70	290	800	1,020
3 – Horley	510	100	630	1,240
4/5 – Banstead	1,640	0	970	2,610
6 – Tadworth	-240	0	570	330
Total	4,110	550	4,680	9,340

Table 7.2 Retail and food/beverage floorspace projections up to 2038 (sq.m gross) – cumulative

Zone	Convenience goods retail	Comparison goods retail	Food/ beverage	Total
1 – Reigate	2,330	270	2,540	5,140
2 – Redhill	30	510	1,200	1,740
3 – Horley	600	170	970	1,740
4/5 – Banstead	1,670	30	1,490	3,190
6 – Tadworth	-210	10	850	650
Total	4,420	990	7,050	12,460

Table 7.3 Retail and food/beverage floorspace projections up to 2043 (sq.m gross) – cumulative

Zone	Convenience goods retail	Comparison goods retail	Food/ beverage	Total
1 – Reigate	2,390	530	3,440	6,360
2 – Redhill	140	930	1,640	2,710
3 – Horley	670	310	1,330	2,310
4/5 – Banstead	1,700	100	2,020	3,820
6 – Tadworth	-190	90	1,150	1,050
Total	4,710	1,960	9,570	16,240

Source: Tables 12 in Appendix 3, 4 and 5.

7.15 Development plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through the expansion of centres. The NPPF indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres for at least ten years. In this case projections beyond 2033 will need to be considered allowing time for future policy to be formulated and adopted. To accommodate growth, local planning authorities should keep town centre boundaries under review.

anticipated in Banstead or Reigate town centres due to the current low shop vacancy rates (already below 5%).

- 7.23 The floorspace capacity projections suggest the priority in the short to medium term will be the reoccupation of vacant shop units, potentially for non-retail uses including food/beverage outlets, leisure, entertainment and cultural uses. During this period there is likely to be a shift from comparison goods retail space to food/beverage and leisure/cultural uses, with some vacant shop premises also converting to these uses. Not all vacant shop units will be suitable for conversion to leisure/cultural uses, therefore some development may be required to accommodate new uses. The floorspace projections suggest there is a need to retain the existing stock of shop premises within centres to accommodate future growth particularly in the convenience goods retail and food/beverage sectors.
- 7.24 The longer term projections to 2038 suggest there may be an emerging quantitative need to increase the combined amount of convenience goods retail and food/beverage floorspace in the Borough, over and above the reoccupation of vacant floorspace. Allowing for reoccupied vacant floorspace, as described above, about 3,900 sq.m gross of additional floorspace could be required by 2038. The capacity projections in Table 7.2 suggest this additional floorspace could be met by new food stores (around 2,000 sq.m gross each) in the north (Zones 4, 5 or 6) and central parts (Zone 1 or 2) of the Borough if suitable sites can be identified. If these new stores cannot be accommodated in designated centres, they could be provided in new local centres to serve future strategic housing allocations.
- 7.25 Only the contraction of the Redhill town centre boundary could be considered necessary if the shop vacancy rate remains high in the future, but there should be potential to transfer growth from other parts of the Borough due to over-lapping catchment areas.
- 7.26 The future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities.

Hierarchy of centres

- 7.27 The network of town centres is currently set out in the Reigate & Banstead Local Plan: Core Strategy and the Key Diagram. The Development Management Plan (DMP) Policy RET3: Local Centres identifies 27 Local Centres, only 20 of which are shown on the Core Strategy Key Diagram. Continuing to identify the hierarchy of centres in the new Local Plan will be important in terms of:
- 1 ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
 - 2 directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
 - 3 identifying a viable role and strategy for each centre.
- 7.28 The analysis of centres in Section 4 and Appendix 2 indicates no amendments to the hierarchy of centres are necessary. However, new local centres may be necessary to serve strategic housing allocations. The boundaries of the Borough's town and local shopping centres should continue to be defined on the Key Diagram and Proposals Map.
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- 7.29 Redhill and Reigate are the largest and dominant town centres in the Borough. Redhill should continue to be identified as the main comparison good shopping destination, but Reigate town centre also attracts a reasonably high level of comparison goods shopping trips and has a stronger food and beverage offer than Redhill. Their roles will continue to provide the focus for retail and leisure development in the Borough serving communities within the wider borough area. Improvement to Redhill’s food/beverage offer e.g. as now provided by The Light Redhill development, should help the to increase the centre’s market share of leisure and food/beverage expenditure and redistribute growth potential.
- 7.30 Banstead and Horley play an important role as a focal point in their respective areas, but do not offer the same range and choice of shops and services available within Redhill and Reigate. However, these centres should continue to be designated as Town Centres that should provide retail, service and leisure uses for their communities and surrounding hinterland, reducing the need to travel longer distances.
- 7.31 The Borough’s Local Centres also play an important role as a focal point in their respective areas. These centres should continue to be designated and protected as Local Centres that will provide important local access to lower order retail and services for their communities. This will reduce the need for residents to travel and increases opportunities for social interaction and supports local jobs.
- 7.32 The NPPF Annex 2 Glossary indicates:
“References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance.”
- 7.33 Some of the smaller local centres in the Borough have limited facilities and may be under threat if shop/service closures occur in the future. Local centres should continue to be protected because they help to ensure all residents have access to local facilities within walking distance.

Impact and sequential tests

- 7.34 Local Plan DMP Policy RET5 relates to the development of town centre uses outside of town and local centres. New Local Plan policy should continue to set out the sequential and impact tests and which designated centres need to be considered. However, Policy RET5 refers to ‘edge of centre’ or ‘out of centre’ locations but does not refer specifically to the town centre boundaries or primary shopping areas (PSA). It is not clear what locations within or close to the town boundaries will be considered to be in centre or edge of centre in sequential terms, or locations where an impact assessment will be required.
- 7.35 The NPPF indicates when assessing applications for retail and leisure development outside of town centres and not in accordance with an up-to-date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold.
- 7.36 Retail uses should first be focused in the PSA. Leisure and other main town centre uses should be focused anywhere in the wider town centre. The need for a separate PSA is addressed below.
- 7.37 Policy RET5 requires impact assessment to support out of centre applications for office uses exceeding 2,500 sq.m. This approach is no longer consistent with the NPPF. Office uses
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should only be required to comply with the sequential test, where they fall beyond the centre boundaries.

7.38 Policy RET5 also indicates retail and other town centre uses in edge of centre or out of centre locations must consider all sequentially preferable sites “on more central sites”.

7.39 Applications for development in out of centre locations are only required to consider town centre and edge of centre sites. The NPPF (paragraph 92) states that “when considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre.” An out of centre site could be rejected under the sequential test where it is not accessible or not well connected to the town centre, and where another accessible and well connected site is available and suitable.

7.40 Local Plan DMP Policy RET6 relates to retail warehousing, which allows these types of retail uses in two designated out of centre areas: Rushworth Road in Reigate and Brighton Road in Redhill. Retail warehouse proposals in these areas are not required to comply with the sequential test although the impact test (Policy RET5) still applies.

7.41 The reduced comparison goods retail floorspace projections and decline in bulky goods operator demand outlined in Section 3, suggest designated out of centre areas for these types of retail outlets is no longer necessary. The exclusion of Policy RET6 from the New Local Plan should be considered. Any future retail warehouse proposals that emerge in these areas, or any other out of centre location, could still come forward subject to meeting the sequential and impact tests.

Impact threshold

7.42 Local Plan DMP Policy RET5 indicates where impact assessments will be required for development outside town and local centres. As indicated above, reference to office uses should be excluded from the impact test in the new Local Plan. Currently all retail and leisure development may need to be supported by an impact assessment where it exceeds the following thresholds:

- comparison goods retail exceeding 150 sq.m;
- convenience goods retail exceeding 250 sq.m; and
- leisure uses exceeding 2,500 sq.m.

7.43 The NPPF indicates, if there is no locally set threshold, then the default impact threshold is 2,500 sq.m gross. Policy RET5 presumably refers to gross rather than net sales floorspace figures, consistent with the NPPF, but this is not clarified in the current Local Plan.

7.44 The PPG provides guidance on setting locally appropriate thresholds, and indicates it will be important to consider:

- the scale of proposals relative to town centres;
 - the existing viability and vitality of town centres;
 - cumulative effects of recent developments;
 - whether local town centres are vulnerable; and
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- the likely effects of development on any town centre strategy; and the impact on any other planned investment.

- 7.45 The PPG also states that where authorities do not have their own floorspace thresholds for impact assessments in local development plans, national policy requires impact assessments to be submitted for retail and leisure developments over 2,500 sq.m gross. The PPG acknowledges the need to consider the impact of proposals below this floorspace threshold, e.g. if they are large developments when compared with the size of a nearby centre, or likely to have a disproportionate effect or ‘tip the balance’ of a vulnerable centre.
- 7.46 As in the adopted Local Plan: DMP, the NPPF minimum threshold of 2,500 sq.m gross continues to be an inappropriate threshold for Reigate & Banstead Borough because this scale of development would exceed the five-year retail and food beverage projections for all centres in the Borough. The retail capacity projections, relatively high vacancy rate in Redhill and uncertainties about the post-cost of living crisis recovery suggest town centres are now more vulnerable to out-of-centre developments. Given the overlapping nature of catchment areas in the Borough, a consistent impact threshold should be applied across the authority area as adopted in Policy RET5. However, the minimum thresholds should be reviewed.
- 7.47 Based on the relatively low floorspace capacity projections set out in Tables 7.1, 7.2 and 7.3, the new Local Plan should continue to adopt lower impact thresholds for retail and leisure uses. Based on Lichfields’ experience, the current Local Plan impact thresholds for comparison retail (150 sq.m net) is relatively low and development of this small scale is unlikely to have a significant adverse impact on town or local centres. The 2,500 sq.m threshold for leisure development is perhaps too high when compared with the capacity projections in Section 6.
- 7.48 The Council should consider introducing a consistent amended impact threshold in line with the Sunday trading limit (around 400 sq.m gross or 280 sq.m net sales) to protect the vitality and viability of designated town and local centres for retail and leisure uses.
- 7.49 All retail and leisure developments over 400 sq.m gross (combined) proposed outside or on the edge of designated town and local centres should be required to prepare a proportionate impact assessment, including retail and leisure uses included within mixed use allocations. The level of detail required in the impact assessment will vary case-by-case and it is for the applicant to provide robust justification that their impact assessment is robust, appropriate and proportionate.

Implications of UCO changes for the impact and sequential tests

- 7.50 Retail and leisure uses previously related to use classes A1 to A5 and D2 leisure uses. These use classes and related evidence informed the current Local Plan. Changes to the UCO may lead to confusion. For example, not all uses within the new Class E are retail or leisure uses, requiring an impact assessment i.e. offices and medical uses. Bearing in mind the potential for confusion arising from the UCO changes and for consistency with the NPPF, New Local Plan policies relating to the impact test should continue to refer to retail and leisure uses rather than Class E within the new UCO. The sequential test should refer to all main town centre uses as described in the NPPF glossary.
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Sequential test floorspace threshold

- 7.51 The NPPF does not refer to a minimum floorspace threshold where the sequential test will be applied to main town centre uses in the same way as the impact test. All main town centre uses regardless of scale are required to comply with the sequential test. However, the PPG suggests some certain main town centre uses have “particular market and locational requirements that mean they may only be accommodated in specific locations,” but robust justification must be provided to satisfy the sequential test in this respect. This approach may allow smaller scale local facilities outside designated local centres to be provided in areas that may be poorly served and/or within mixed use development to provide facilities catering for the local needs of the development, without needing to consider the sequential test.
- 7.52 Local Plan DMP Policy RET4 protects retail uses outside of designated centres but the policy does not actively support new facilities in poorly served areas. This Policy could be amended in the New Local Plan to support small scale shops and services outside designated centres, where a particular market and locational requirement has been robustly justified. Furthermore, the policy could be expanded to protect valuable local services as well as retail uses.

Town centre and primary shopping area boundaries

- 7.53 The New Local Plan should continue to define clear boundaries for town and local centres on the Proposals Map. Designated centres should remain the expected focus for retail, leisure and other main town centre uses. The classification of centres within the hierarchy is important in identifying which centres are relevant in the search for sequential sites.
- 7.54 The continued identification of town and local centre boundaries and primary shopping areas (PSA) in town centres are important when applying the sequential approach, to direct retail and other town centre uses to sustainable locations and determine whether a retail impact assessment is required. The NPPF continues to indicate that the first preference for retail uses should be the PSA. However, in some circumstance where a centre is relatively small, the town centre boundary and PSA may cover the same area. In which case, only one boundary is required on the proposals map.
- 7.55 The first preference for leisure and other non-retail main town centre uses is normally the wider defined town centre area, which usually includes the PSA and other parts of the town centre. The ability to focus new retail uses within the PSA, rather than the wider town centre area or out of centre locations, has become more difficult with the introduction of the new Class E, which allows free movement to and from retail use and other town centre uses.
- 7.56 The continued need for both town centre boundaries and PSA areas in the four town centres needs to be considered, particularly in Banstead and Horley where the PSA includes most of the area within the town centre boundary.
- 7.57 The area of search for sequential sites i.e. relevant centres will depend on the scale, nature and location of the proposed town centre uses and the catchment area they are likely to serve, should be considered on a case-by-case basis. As indicated above, some proposed main town centre uses may have market and locational requirements that cannot be met
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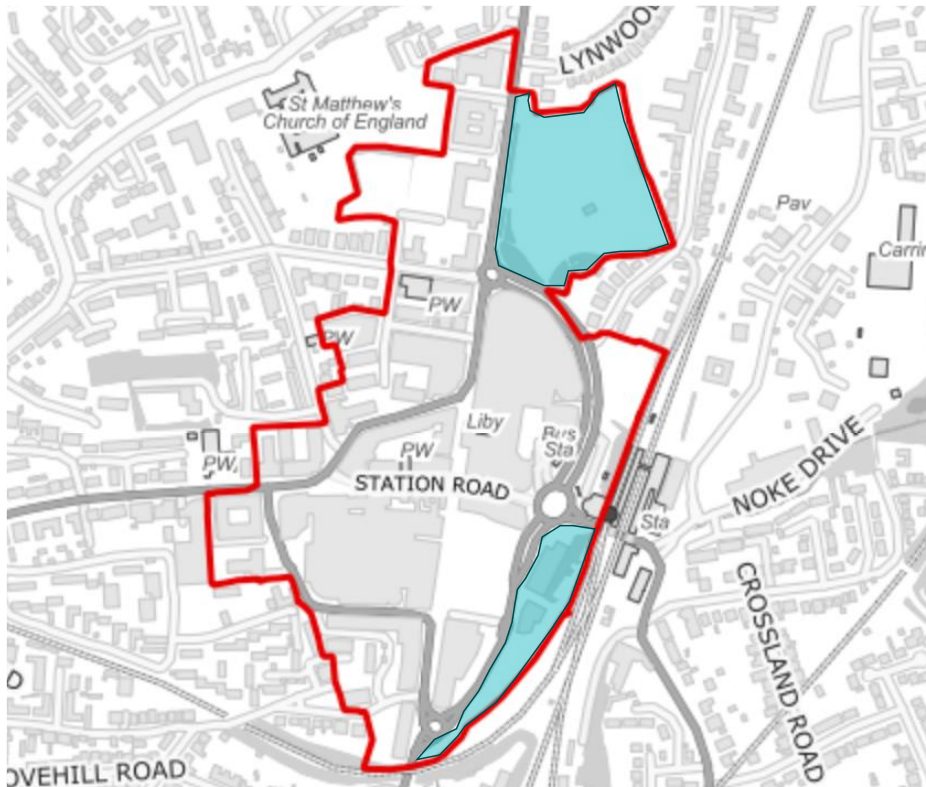
within designated centres. Where this requirement is suggested, robust justification must be provided by the applicant.

7.58 The relatively low retail floorspace capacity projections suggest there may be no need to extend centre or PSA boundaries to accommodate future growth and some, such as Banstead might be suitable for contraction. However, the floorspace projections suggest a small long-term under-supply of floorspace, that implies the contraction of most centre boundaries is also unnecessary. The expansion or contraction of centre boundaries should be considered on a centre by centre basis, as outlined below.

7.59 The contraction of centre or PSA boundaries is only likely to be appropriate where there is a concentration of non-town centre uses on the periphery of centres e.g. residential gaps in frontages or a concentration of vacant shop units.

Redhill

7.60 The current town centre boundary for Redhill is relatively widely drawn. It includes office uses outside the PSA, town centre car parks and Memorial Park. Memorial Park and recent residential developments between Marketfield Way and the railway line could be excluded from the town centre boundary, as shown in Figure 7.1.



7.61 The current PSA includes the Belfry and Quadrant Shopping Centres, Sainsbury's and the main north-south and east-west shopping spine along London Road and Station Road. This area includes the designated primary and secondary shopping frontages. The shop vacancy rate is higher than the UK and Borough averages. Vacant floorspace in the town centre and local centres in Zone 2 should be capable of accommodating projected growth in Zone 2 - Redhill up to 2038 (1,740 sq.m gross) and there may be further potential to accommodate transferred growth from Zone 1 - Reigate due to the overlapping catchment areas.

- 7.62 No contraction or expansion of the designated PSA is considered necessary, although a more flexible approach may be required to tackle the relatively high shop vacancy rate.

Reigate

- 7.63 The Reigate town centre boundary is also relatively widely drawn. It includes office/employment and civic areas beyond the main shopping streets, and the Reigate Castle and grounds. The PSA includes the main shopping streets and frontages along the High Street, Church Street and Bell Street, which includes the designated primary and secondary shopping frontages.
- 7.64 The shop vacancy rate in the town centre and local centres in Zone 1 are significantly below the UK and Borough averages. Vacant floorspace is not sufficient to accommodate projected growth up to 2038 (5,140 sq.m gross) but there is potential to transfer growth to Zone 2 – Redhill, where the shop vacancy rate is much higher. Some of the residual floorspace capacity up to 2038 could be met by a new food store (around 2,000 sq.m gross) in the central part of the Borough (zone 1 or 2) if a suitable site can be identified, or within a new centre to serve a strategic housing allocation in this area.
- 7.65 No contraction or expansion of the designated town centre or PSA boundaries are considered necessary in Reigate town centre.

Banstead

- 7.66 The town centre and PSA boundary in Banstead are tightly drawn around the retail/commercial areas. The extent of the town centre boundary and PSA are similar. The PSA excludes the library and Banstead clinic in the west of the centre and town centre uses on the south side of the High Street in the east of the centre. The need for the slightly smaller and separate PSA is not clear and the deletion of the PSA should be considered in the New Local Plan.
- 7.67 The shop vacancy rate in the town centre is significantly below the UK and Borough averages. Vacant floorspace in the town centre and local centres in Zones 4/5 is not sufficient to accommodate projected growth for Zone 4/5 up to 2038 (3,190 sq.m gross). There is limited physical potential to expand Banstead's town centre boundary to accommodate residual capacity due to surrounding uses.
- 7.68 Much of the residual floorspace capacity up to 2038 could be met by a new food store (around 2,000 sq.m gross) in the north of the Borough (Zones 4, 5 or 6) if a suitable site can be identified, or within a new centre to serve a strategic housing allocation in this area.

Horley

- 7.69 The town centre boundary and PSA are reasonably tightly drawn around the retail/commercial area. The town centre boundary extends slightly further than the PSA, including the railway station to the south and other non-retail town centre uses to the west. Again, the need for a slightly smaller and separate PSA is not clear. The deletion of the PSA in Horley should be considered in the New Local Plan.
- 7.70 Vacant floorspace in the town centre and local centres in Zone 3 could be capable of accommodating about 40% of the projected capacity in Zone 3 – Horley up to 2038 (700
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sq.m gross of the 1,740 sq.m gross total). There is limited physical potential to expand Horley's town centre boundary to accommodate residual capacity due to surrounding uses.

- 7.71 Residual capacity could be accommodated in small scale in-fill developments or extensions. Alternatively a new local centre to serve a strategic housing allocation in this area could be considered.

Controlling the mix of uses

- 7.72 The ability to control the mix of uses within centres and designated frontages has changed significantly since the Local Plan: DMP was adopted in 2019. Current and future market trends; the relatively low retail floorspace capacity projections; and changes to the NPPF and the UCO; indicate a more flexible approach to shopping policies and the mix of uses within centres should be considered.
- 7.73 A balanced approach that recognises the need to maintain and enhance each centre's retail role, as well as introducing new non-retail uses including activities in the early evening and night-time economy. However, there is still a need to retain and encourage new retail uses previously categorised as Class A1 uses within the town and local centres, but changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR) will restrict the future policy approach.
- 7.74 Considering the changes to the UCO and PDR, restrictive policies may be unsound and unimplementable for existing premises. However, the introduction of Article 4 directions can be considered e.g. to remove permitted changes of use from Class E to residential (Class MA) both within relevant town and local centres to protect their vitality and viability. However, Article 4 directions cannot prevent movement within the same use class i.e., new Class E. The loss of retail uses to other sub-categories of Class E cannot be controlled.
- 7.75 In some circumstances the introduction of restrictive shopping policies or Article 4 directions could be inappropriate e.g. in areas with a high level of vacancies and where an increase in vacant units could harm the vitality and viability of the centre, for example in Redhill town centre. Demand from retail occupiers has reduced and the updated retail floorspace projections are much lower than previous projections, particularly comparison goods retail. The continuation of the policy approaches set out in DMP Policy RET2 will be undermined and hampered by the UCO/PDR changes.
- 7.76 Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses can be assessed against criteria-based policies e.g. relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. Betting shops and hot food takeaways are Sui Generis uses that can still be controlled by policy, and this not affected by changes to the Use Classes Order or Permitted Development Rights Other non-Class E uses at ground floor level can be controlled within the designated frontages.
- 7.77 Notwithstanding the reduced controls, the mix of uses within Use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required i.e., where there is a change of use requiring planning permission, redevelopment or new development is proposed, in the same way planning conditions/legal agreements were previously used to control movement usually permitted within the former Class A uses. This approach could be used to control the mix of ground floor uses on development site allocations. Consistent with the approach adopted in DMP Policy RET1, planning policy could seek to control the mix of uses within Class E for new development where planning
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conditions can be introduced restricting movement within the use class and the retention of active ground floor frontages.

- 7.78 The New Local Plan could continue to designate PSA's within Redhill and Reigate town centres to manage the mix of uses and protect the vitality and viability of these centres. The continued designation of primary and secondary frontages, in addition to a PSA, is no longer consistent with the revised NPPF and is probably unnecessary due to the changes to the UCO. The designated town centre boundaries in Banstead, Horley and the local centres could be adopted to control the mix of uses, rather than a PSA or frontage designations.
- 7.79 Strengthening or retaining the current RET1 policy approach will be difficult to implement due to the changes to the UCO and the floorspace projections suggest some shift from retail to non-retail use is appropriate. A laissez-faire approach that does not seek to protect retail and town centre uses, on the basis that the market will determine the appropriate mix of uses within town centres is unnecessary because shop vacancy rates are generally low within the Borough and this approach could undermine the retail role of some centres.

Redhill

- 7.80 Local Plan: DMP Policy RET2 seeks to retain a minimum level of Class A1 uses in primary and secondary frontages in Redhill town centre. Policy RET2 indicates Class A1 uses must be retained as a minimum 65% of the primary frontage and 40% of the secondary frontages.
- 7.81 About 85% of the frontages designated in Redhill town centre are primary frontages. Excluding vacant units, about 70% of the occupied primary frontages were in Class A1 use in 2023, which is above the Policy RET2 minimum threshold. However, 18% of the primary frontages were vacant. Only 28% of the occupied secondary frontages were in Class A1 use.
- 7.82 The relatively high shop vacancy rate in Redhill in 2023 and the low retail floorspace capacity projections suggest a more flexible approach may be appropriate in Redhill. The occupation of units in the Rise development since 2023 will absorb some of the floorspace capacity.

Reigate

- 7.83 Local Plan: DMP Policy RET2 seeks to retain Class A1 uses as a minimum 70% of the primary frontage and 55% of the secondary frontages in Reigate.
- 7.84 About 80% of the frontages designated in Reigate town centre are primary frontages. Excluding vacant units, about 60% of the occupied primary frontages were in Class A1 use in 2023, which is below the Policy RET2 minimum threshold. Only 53% of the occupied secondary frontages were in Class A1 use. Land use information suggests the Policy RET2 thresholds have already been breached in Reigate.
- 7.85 The relatively low shop vacancy rate in Reigate suggest retail and other main town centre use floorspace should continue to be protected.

Banstead

- 7.86 Local Plan: DMP Policy RET2 seeks to retain Class A1 uses as a minimum 65% of the primary frontage in Banstead. Excluding vacant units, about 65% of the occupied primary frontages were in Class A1 use in 2023, which is in line with the Policy RET2 minimum
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threshold. The relatively low shop vacancy rate in Banstead suggest retail and other main town centre use floorspace should continue to be protected.

Horley

- 7.87 Local Plan: DMP Policy RET2 seeks to retain Class A1 uses as a minimum 55% of the primary frontage in Horley. Excluding vacant units, about 54% of the occupied primary frontages were in Class A1 use in 2023, which is in line with the Policy RET2 minimum threshold. The relatively low shop vacancy rate in Horley suggest retail and other main town centre use floorspace should continue to be protected.

Recommended policy approach

- 7.88 A designated primary shopping area is recommended in Redhill and Reigate town centres. Within these areas and the town centre boundaries for other centres, the objective should be to maintain and enhance the retail offer and other uses within Class E. Development should maintain an active frontage. Within other parts of Redhill and Reigate town centres a wider range of main town centre uses including Class E, Sui Generis and Class F could be promoted and protected.
- 7.89 Proposals that require planning permission that would result in the loss of these uses at ground floor level in the primary frontage or wider town centre should only be permitted subject to criteria relating to:
- individual or cumulative impact on neighbouring amenity;
 - adverse impact on the vitality and viability of the centre as a whole;
 - provision of an active frontage at ground floor level which relates well to the design of the building and to the street-scene and its setting; and
 - adequate marketing of the unit for Class E uses in primary frontages or Class E, Sui Generis and Class F uses in other parts of the centre.
- 7.90 Encouraging Class E uses within the primary frontages will include main town centre uses not previously permitted at ground floor level e.g., offices and leisure uses. Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses would be permitted in other parts of the town centre where appropriate i.e., preventing breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. This approach will allow significant flexibility within the town centres.
- 7.91 In the future and in specific cases, it may be appropriate to consider Article 4 directions to prevent permitted changes of use that could undermine the character or vitality and viability of town and local centres. However, Article 4 directions cannot restrict the movement of activities within the new Class E and the potential to use this approach is limited in relation to retaining retail uses within the centre.
- 7.92 The mix of uses within Use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required i.e., changes of use requiring planning permission, redevelopment or new development is proposed. This approach could be used to control the mix of ground floor uses on development site allocations in centres.
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8.0 Conclusions and recommendations

- 8.1 This section draws together the analysis set out in previous sections and provides strategic recommendations for Reigate & Banstead Borough. It explores how the identified growth and change across the Borough could be accommodated and the future role of the town centres.

Meeting Reigate and Banstead's needs

- 8.2 When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability. The combined floorspace projections for retail and food/beverage floorspace in 2033, 2038 and 2043 are summarised and rounded in Tables 8.1 and 8.2. These are gross floorspace projections, which are based on a net to gross ratio of 70% for convenience and comparison goods retail floorspace.

Table 8.1 Combined retail and food/beverage floorspace requirements (sq.m gross) - cumulative

	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food /beverage (sq.m gross)	Total (sq.m gross)
By 2033	4,110	550	4,680	9,340
By 2038	4,420	990	7,050	12,460
By 2043	4,710	1,960	9,570	16,240

Table 8.2 Combined floorspace requirements by location (sq.m gross) - cumulative

Zone	By 2033	By 2038	By 2043
1 – Reigate	4,130	5,140	6,360
2 – Redhill	1,020	1,740	2,710
3 – Horley	1,240	1,740	2,310
4/5 – Banstead	2,610	3,190	3,820
6 – Tadworth	330	650	1,050
Total	9,340	12,460	16,240

- 8.3 Long-term floorspace capacity forecasts beyond 2033 years are susceptible to unforeseen circumstances. Growth forecasts for expenditure and turnover are particularly uncertain and need to be carefully monitored, including the continued growth in home/internet shopping. Long-term projections must be treated with caution and kept under review. The new Local Plan should seek to accommodate for at least ten years and potentially up to 2038.
- 8.4 Due to over-lapping shopping catchment areas, there should be potential to redistribute capacity to Redhill from other parts of the Borough. Redhill has the main concentration of vacant floorspace and the most potential to accommodate growth within the designated centre.

- 8.5 The combined total projection to 2033 is 9,340 sq.m gross which is much less than the current amount of vacant shop floorspace in the town and local centres (about 15,600 sq.m gross). Based on a reasonable reduction in shop vacancy rates, reoccupied space could in theory accommodate most of the projected capacity need up to 2033.
- 8.6 If about 8,600 sq.m gross of vacant space can be re-occupied in the short-term then the longer term residual capacity could be about 3,900 sq.m gross by 2038. The residual rerail capacity could be met by food stores in the north and central parts of the Borough if suitable sites can be identified, within new local centres to serve strategic housing allocations.
- 8.7 The capacity projections in this update suggest there is no pressing requirement to allocate sites for major retail development to accommodate projected growth for the next ten years. The priority in the short to medium term will be the reoccupation of vacant shop units. However, the future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities.
- 8.8 The leisure expenditure projections indicate there may be potential to accommodate an additional 3,500 sq.m gross of commercial leisure and cultural floorspace by 2043, which could include:
- a small boutique cinema (if visitation rates return to pre-Covid levels);
 - 3 medium sized health and fitness facilities (about 200 new fitness stations);
 - new leisure innovations e.g. trampolines, indoor climbing, escape rooms, virtual sport activities; and
 - small scale tourist attractions/cultural facilities.
- 8.9 The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities.

Future planning policy

Hierarchy of centres

- 8.10 Identifying the hierarchy of centres and the boundaries of centres in the new Local Plan is important in terms of:
- ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
 - directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
 - identifying a viable role and strategy for each centre.
- 8.11 Redhill and Reigate should be designated as Primary Town Centres at the top of the hierarchy of centres, which will be the focus for retail and leisure development in the Borough. Banstead and Horley should continue to be designated as Town Centres serving their communities within the north and south of the authority area. The network of town
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and local centres should be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.

Impact and sequential tests

- 8.12 The new Local Plan should continue to set out the sequential and impact tests and which designated centres need to be considered. New Local Plan policies relating to the impact test should continue to refer to retail and leisure uses rather than Class E within the new UCO. The sequential test should refer to all main town centre uses as described in the NPPF glossary. Office uses should only be required to comply with the sequential test but not the impact test. New Local Plan policies should reflect the NPPF wording. Out of centre designated areas for further retail warehousing is unnecessary.
- 8.13 The NPPF minimum threshold of 2,500 sq.m gross continues to be an inappropriate threshold for Reigate & Banstead Borough because this scale of development would exceed the five-year retail and food beverage projections for all centres in the Borough. Given the overlapping nature of catchment areas in the Borough, a consistent impact threshold should be applied across the authority area but the existing minimum thresholds should be reviewed. The Council should consider introducing a consistent amended impact threshold in line with the Sunday trading limit (around 400 sq.m gross or 280 sq.m net sales) to protect the vitality and viability of designated town and local centres for retail and leisure uses.
- 8.14 Current Local Plan policies protect retail uses outside of designated centres but do not actively support new facilities in poorly served areas. Small scale shops and services outside designated centres could be supported, where a particular market and locational requirement has been robustly justified.

Town and local centre boundaries

- 8.15 The New Local Plan should continue to define clear boundaries for town and local centres on the Proposals Map and should remain the focus for retail, leisure and other main town centre uses. The continued need for both town centre boundaries and primary shopping areas (PSA) in the four town centres needs to be considered, particularly in Banstead and Horley. The relatively low retail floorspace capacity projections, particularly up to 2033, suggest there may be no need to extend centre or PSA boundaries to accommodate future growth, but the longer term projected under-supply of floorspace implies the contraction of most centre boundaries is also unnecessary. The following amendments could be considered:
- Redhill's town centre boundary could exclude Memorial Park and residential development between Marketfield Way and the railway line;
 - Banstead's PSA could be deleted; and
 - Horley's PSA could be deleted.

Controlling the mix of uses

- 8.16 The designated primary shopping frontages should be retained, where retail and other Class E uses should be to maintain and enhanced in these areas. Development in the primary
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frontages should maintain an active frontage. Within other parts of the town centres a wider range of main town centre uses including Class E, Sui Generis and Class F could be promoted and protected.

8.17 Proposals that require planning permission that would result in the loss of these uses at ground floor level in the primary frontage or wider town centre should only be permitted subject to criteria relating to:

- individual or cumulative impact on neighbouring amenity;
- adverse impact on the vitality and viability of the centre as a whole;
- provision of an active frontage at ground floor level which relates well to the design of the building and to the street-scene and its setting; and
- adequate marketing of the unit for Class E uses in primary frontages or Class E, Sui Generis and Class F uses in other parts of the centre.

8.18 In the future and in specific cases, it may be appropriate to consider Article 4 directions to prevent permitted changes of use that could undermine the character or vitality and viability of town centres and local centres.

Future monitoring

8.19 The recommendations and projections within this study will assist the Council in reviewing development plan policies over the coming years and to assist future development management decisions. The study provides an overview of the potential need for further retail and leisure development in the medium and long-term up to 2043. Longer-term projections are subject to uncertainty and forecasts will need to be amended to reflect emerging changes, as and when new information becomes available. These uncertainties include the longer-term implications of the Covid-19 and cost of living crisis that will need to be monitored. Longer-term projections after 2033 should be treated with caution and provide broad guidance only. Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
- existing retail floorspace and average turnover to floorspace densities; and
- implemented development within and around the study area.

8.20 These key inputs into the retail/leisure capacity assessment can be amended to provide revised capacity projections.

Appendix 1 Study area

Table 1 Study Area Zones and Postcode areas

Zone	Postcode Sector	Household survey sample
1. Reigate	RH2 0 RH2 7 RH2 8 RH2 9	100
2. Redhill	RH1 1 RH1 2 RH1 3 RH1 4 RH1 5 RH1 6	120
3. Horley	RH6 0 RH6 7 RH6 8 RH6 9	100
4. Caterham	CR3 5 CR3 6 CR5 1 CR5 2 CR5 3	130
5. Banstead	KT17 3 SM2 5 SM2 6 SM2 7 SM5 4 SM7 1 SM7 2 SM7 3	150
6. Tadworth	KT17 4 KT18 5 KT18 6 KT20 5 KT20 6 KT20 7 RH3 7	100

Key



Reigate and Banstead
Local Authority Boundary



Zone 1



Zone 2



Zone 3



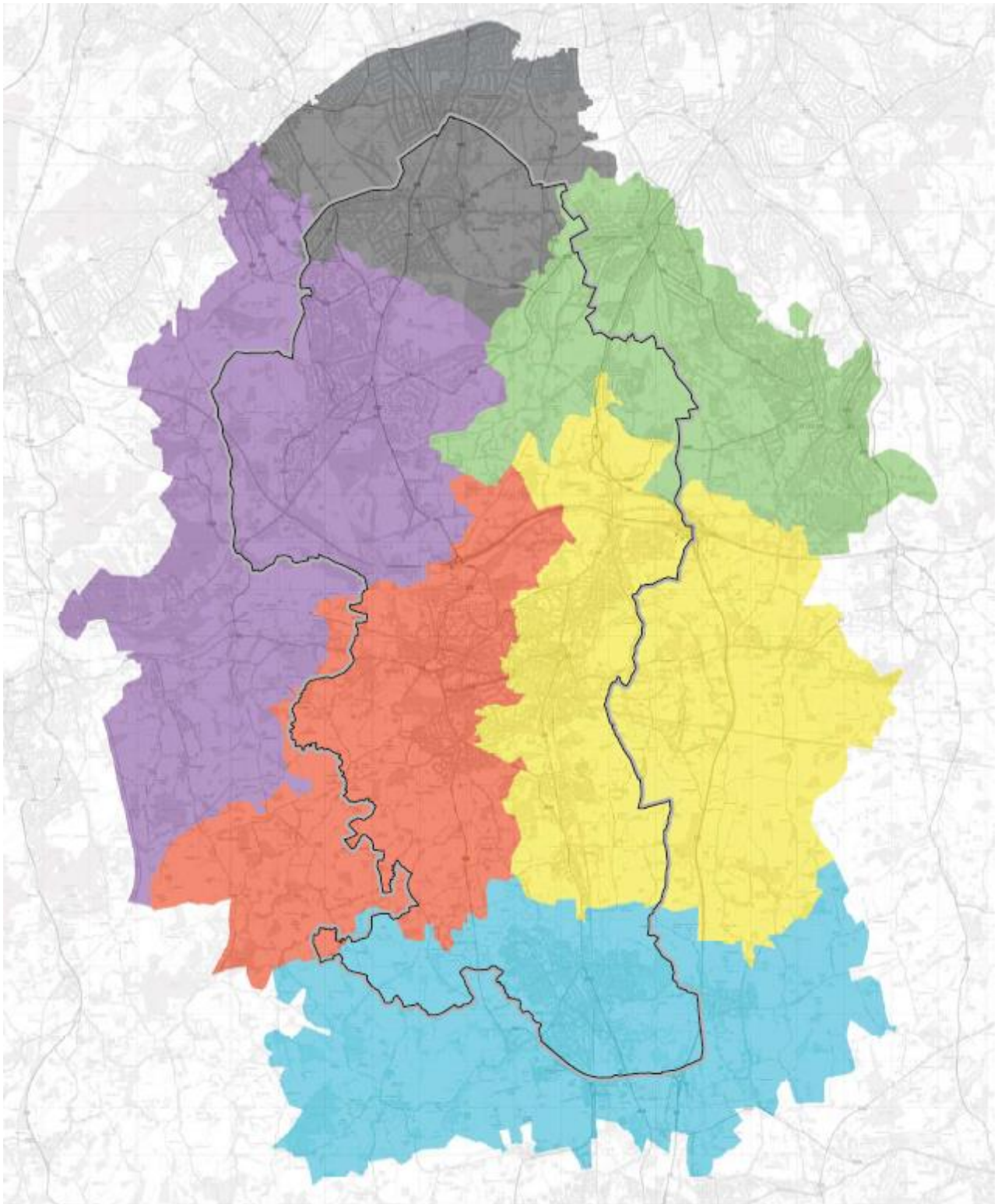
Zone 4



Zone 5

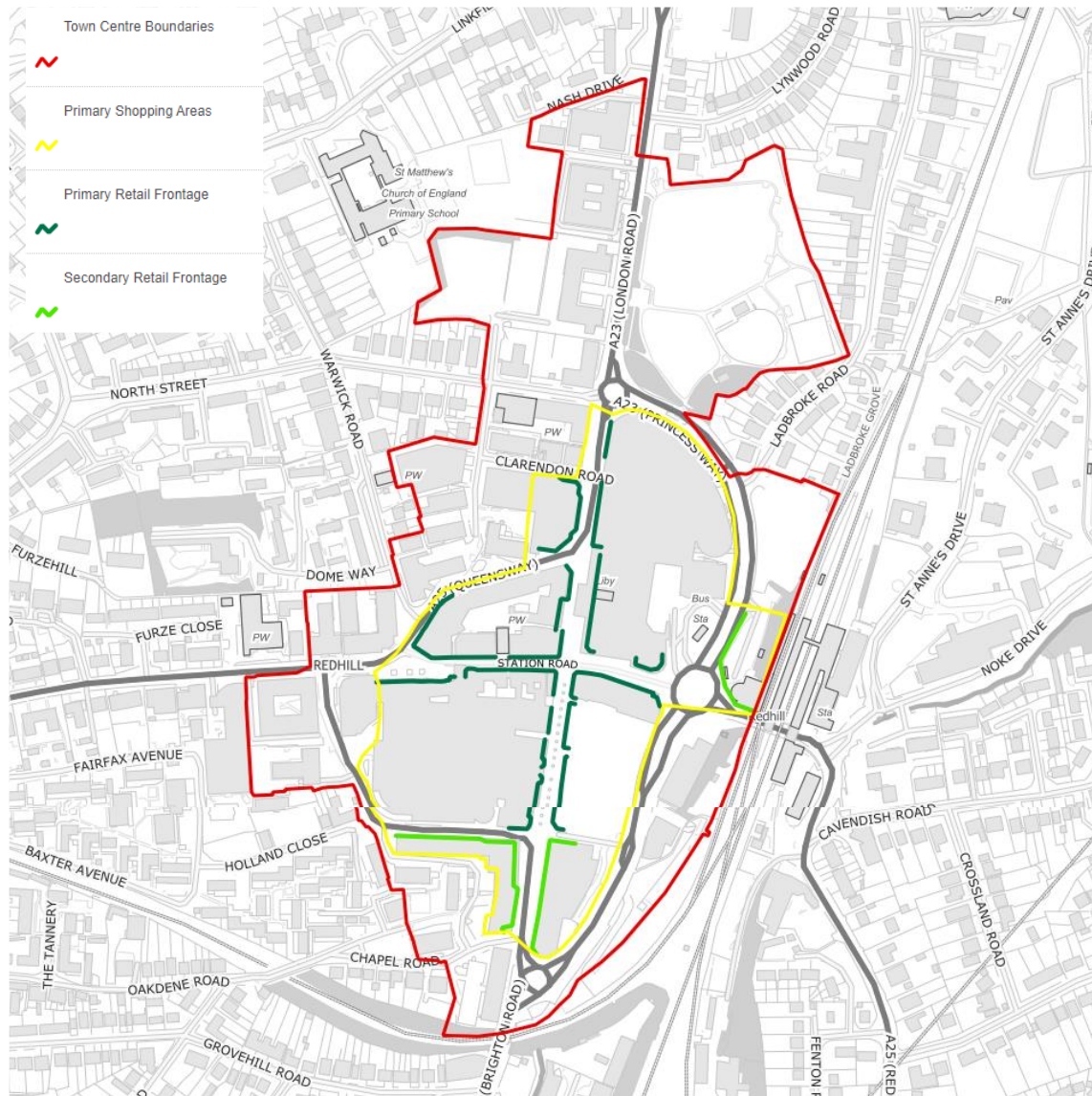


Zone 6



Appendix 2 Centres health checks

REDHILL TOWN CENTRE



Mix of Uses

Redhill town centre was designated as the Primary Centre in the Reigate & Banstead Core Strategy (adopted 2014 and reviewed 2019). It features 153 retail and service units (excluding office and leisure & community uses), and the mix of uses is set out in Table 1, which is compared with the Borough and UK averages. The total ground floor area of these units totals 57,597 sq.m gross, and the mix of floorspace is shown in Table 2. Redhill is the largest town centre in the Borough and the focal point for economic and cultural provision.

There were 28 vacant units within the centre at the time of the Council's 2023 land use survey, equating to a shop vacancy rate of 18.3%, which is above the UK average and much higher than the Borough average. Despite the high vacancy rate in terms of the number of units, vacant floorspace remains lower than the national average. The high vacancy rate suggests that the supply of premises currently exceeds the level of operator demand and/or vacant units do not meet operator's requirements e.g. size. However, these results in Redhill are likely skewed due to recent developments in the centre (some of which have since been let out) including the

vacant units in the recently opened mixed-use development The Rise, including the Light Cinema.

Table 1 Mix of retail and service uses – Redhill town centre

Type	Number of units	% units	% units Borough average	% units UK average
Comparison retail	51	33.3	27.6	28.8
Convenience retail	12	7.8	10.7	9.8
Financial / Professional	17	11.1	9.5	8.8
Restaurant / Café	17	11.1	12.4	10.4
Public house / Bar	2	1.3	2.3	5.1
Hot food takeaway	1	0.7	5.4	6.4
Other non-retail services	25	16.3	22.6	16.2
Vacant units	28	18.3	9.4	14.5
Total	153	100.0	100.0	100.0

Source: RBBC Land Use Survey July 2023 and Goad Plan UK average.

Table 2 Mix of retail and service floorspace – Redhill town centre

Type	Area of floorspace sq.m	% floorspace	% floorspace UK average
Comparison retail	20,806	36.1	33.8
Convenience retail	17,022	29.6	17.7
Financial / Professional	3,263	5.7	7.1
Restaurant / Café	5,160	9.0	7.9
Public house / Bar	690	1.2	6.5
Hot food takeaway	137	0.2	3.4
Other non-retail services	2,424	4.2	8.2
Vacant units	8,095	14.1	15.3
Total	57,597	100.0	100.0

Source: RBBC Land Use Survey July 2023 and Goad Plan UK average.

The composition and mix of uses in Redhill broadly reflects the national average, with a few notable differences. The centre has a higher proportion of comparison retailers compared with the Borough and UK averages, despite the higher vacancy rate. There is a relatively low provision of convenience goods shops, pubs & bars and hot food takeaways. However, whilst the percentage of convenience goods shops is low, the proportion of convenience retail floorspace in Redhill is much higher than the national average, primarily due to the large Sainsbury's superstore located within the centre. A more detailed breakdown of comparison goods retail outlets and non-retail services is shown in Tables 3 and 4.

Redhill has 51 comparison goods retail shops, the second highest of the centres in the Borough, behind Reigate. However, Redhill does have the highest proportion of floorspace dedicated to comparison goods in the Borough, due to the focus of larger stores. There is a good range and choice of shops, with 11 of the 14 Goad Plan shop categories represented, as shown in Table 3.

There are higher concentrations of the books, arts, cards & stationers, variety, department & catalogue stores, toys, hobby, cycle & sports store, and chemists, drugstores & optician categories found in the centre when compared to the national averages, although the latter remains consistent with the Borough's average. There is less representation of categories such as clothing & footwear, and furniture, carpets & textiles, the percentages of which are significantly lower than the UK averages. There are no shops represented in the china, glass & gifts, cars, motorcycles & accessories, and florists, nurserymen & seedsmen categories.

Table 3 Mix of comparison goods retail uses – Redhill town centre

Type	Number of units	% units	% units Borough average	% units UK average
Clothing and footwear	7	13.7	13.6	21.1
Furniture, carpets and textiles	2	3.9	13.6	7.5
Books, arts, cards and stationers	6	11.8	6.0	6.2
Electrical, music and photography	4	7.8	6.0	9.3
DIY, hardware and homeware	2	3.9	7.2	7.0
China, glass and gifts	0	0.0	4.0	5.7
Cars, motorcycles and accessories	0	0.0	0.8	1.2
Chemists, drugstores and opticians	8	15.7	15.6	12.1
Variety, department and catalogue	4	7.8	1.6	1.6
Florists, nurserymen and seedsmen	0	0.0	2.8	2.2
Toys, hobby, cycle and sports	6	11.8	6.8	5.5
Jewellers	2	3.9	3.6	5.1
Charity and second-hand shops	6	11.8	10.0	9.9
Other comparison goods retailers	4	7.8	8.4	5.6
Total	51	100.0	100.0	100.0

Source: RBBC Land Use Survey July 2023 and Goad Plan UK average.

Table 4 Mix of non-retail service uses – Redhill town centre

Type	Number of units	% units	% units Borough average	% units UK average
Restaurant / café	17	31.5	28.1	24.6
Public house / bar	2	3.7	5.2	22.0
Hot food takeaway	1	1.9	12.2	11.4
Bank / other financial service	8	14.8	6.1	11.3
Betting shop / amusement	2	3.7	2.3	6.7
Estate agent / valuer	9	16.7	12.0	6.2
Travel agent	0	0.0	0.7	1.1
Hairdresser / beauty parlour	13	24.1	29.0	15.5
Launderette / dry cleaner	2	3.7	4.5	1.1
Sub-total	54	100.0	100.0	100.0
Other non-retail services	8			
Total	62			

Source: RBBC Land Use Survey July 2023 and Goad Plan UK average.

Redhill town centre has a reasonable range and choice of non-retail services (62 units), as shown in Table 4. The food and beverage offer across Redhill is primarily comprised of restaurants & cafés, rather than pubs & bars and hot food takeaways. There is also a strong provision of banks & other financial services, estate agents & valuers, and hairdressers & beauty parlours, but no travel agents.

There is a strong mix of national multiple retailers, as set out in Table 5, as well as small independent stores.

Table 5 Multiple retailers – Redhill town centre

Comparison		Convenience	Food and Beverage
3	Robert Dyas	Holland & Barrett	Costa Coffee
Argos	Ryman Stationery	Iceland	Domino's
Bensons for Beds	Savers	M&S Foodhall	Greggs
Boots	Shoe Zone	Nisa	KFC
Boots Opticians	Specsavers	Poundland	Kokoro
British Heart Foundation	Sports Direct	Sainsbury's	McDonald's
British Red Cross	St Catherine's Hospice	Tesco Express	Mooboo
Card Factory	Superdrug		Muffin Break
Cards Direct	Tapi Carpets		Papa John's
CEX	The Children's Trust		Subway
Claire's	The Fragrance Shop		
Clarks	The Salvation Army		
Fujifilm	The Works		
Game	Timpson		
H&M	Trespass		
JD Sports	Vision Express		
Marks & Spencer	Vodafone		
New Look	Waterstones		
O2	WH Smith		
Poundstretcher			

Source: RBBC Land Use Survey July 2023.

Customer Views

As part of the household survey, respondents across the study area were asked if they had used shop, services, or leisure facilities in Redhill town centre in the last 12 months. A total of 54.0% of respondents in the study area had visited Redhill, which was the second highest figure of the four assessed centres in the Borough. Those who had used shops and services in Redhill, respondents were asked what they liked about the town centre and what improvements would make them visit more often. The main factor liked about Redhill town centre was 20.6% mentioning that it was close to home. Notably, 16.7% could not readily identify anything that they liked about the centre. The other main factors mentioned were:

- *factors liked:* good range of 'high street' retailers (15.5%); good range of supermarkets (12.5%); good leisure facilities (e.g. leisure centres, cinema, health and fitness clubs, etc.) (11.8%); good range of non-food shops generally (11.4%); ability to get everything needed (9.5%); easy to find parking spaces (8.9%); and good market (6.2%).

- *suggested improvements:* more / better clothes shops (12.2%); more 'high street' retailers (10.1%); more / better cafés & restaurants (8.8%); more / better range of non-food shops generally (6.9%); better security & safety (6.7%); less empty shops (5.9%); more attractive / nicer environment (5.7%); more car parking spaces (5.3%); and free car parking (5.1)%.

These household survey results imply slightly higher levels of satisfaction than dissatisfaction with Redhill town centre, although there is scope for improvement.

Catchment Area

The household survey results indicate 54.0% of study area respondents had visited shops, services or leisure facilities in Redhill town centre during the last year, which was the second highest figure after Reigate. About 6.2% of households in the study area do most of their other non-food shopping in Redhill town centre, the highest figure for centres in the Borough.

The retail capacity analysis suggests Redhill attracts 11.5% of all comparison goods expenditure within the study area, with a reasonable level of trade drawn from Zone 1 – Reigate, Zone 2 – Redhill and Zone 4 – Caterham.

The combined base year turnover of Redhill is estimated to be £204 million, the second highest turnover after Reigate. This turnover is split £80 million for convenience retail goods, £102 million for comparison retail goods and £22 million for food & beverage.

Redhill has a reasonably large catchment area when compared with Banstead and Horley. It has a mixed trading base, but the food & beverage sector is relatively weak when compared with Reigate. The comparison shop provision and turnover are consistent with the centre's classification as a Primary Centre at the top of the hierarchy in the Borough.

Rental Levels

According to the Valuation Office Agency (VOA), Redhill has the second highest prime Zone A retail rents of the four centres assessed in the Borough. The prime Zone A retail rent is £592 per sq.m, which is behind Reigate at £800 per sq.m and marginally higher than Banstead at £500 per sq.m. These figures suggest rental levels are strong for a centre of its size and indicate a reasonable level of occupier demand, although the vacancy rate is relatively high.

Zone A retail rents vary throughout the centre, ranging from £400 to £592 per sq.m in the High Street. To the north of High Street and along London Road, Zone A rents range from £250 to £425 per sq.m, with higher rates identified within the pedestrianised area. Along Station Road, Zone A rents are around £475 per sq.m, whilst at The Belfry, Zone A rents drop to £365 per sq.m.

Accessibility

Redhill Railway Station is accessible, less than 100m from primary shopping frontage, on the eastern boundary of the primary shopping area and just within the town centre boundary. The station has four platforms and features a dedicated ticket office and a covered waiting room. The station is managed by Southern and also operates Thameslink and Great Western Railway (GWR) routes, offering semi-hourly services towards London, Reading, Tonbridge, Guildford and Gatwick Airport with onward connections available to Brighton.

Redhill Bus and Coach Station is near the railway station and next to primary shopping frontage. This station serves routes around Redhill, and to Reigate, Earlswood, Merstham, Maidenbower, Croydon, Caterham, Crawley, Epsom, East Grinstead and Guildford.

There are five car parks offering 2,199 spaces within Redhill town centre, of which two are managed by the Council at Gloucester Road and Clarendon Road, and three are privately run at Redhill Station, Warwick Quadrant / Sainsbury's and The Belfry shopping centres. These car parks are all easily accessible to the main shopping area, where on-street parking is limited due to pedestrianised streets.

At the Council car parks, parking charges are shown in Table 6 below:

Table 6 Car parking charges – Redhill town centre

Locations	Monday - Saturday							Sunday & Bank Holiday		
	<20 mins	<1 hr	<2 hrs	<3 hrs	<4 hrs	<5 hrs	<10 hrs	<2 hrs	<4 hrs	4+ hrs
Clarendon Road	£0.40	£1.50	£2.40	£3.00	£3.80	£4.40	£6.60	£1.00	£2.00	£4.00
Gloucester Road	£0.40	£1.50	£2.40	£3.00	£3.80	£4.40	£6.60	£1.00	£2.00	£4.00

Source: RBBC website.

Of the household survey respondents who had visited Redhill in the past year, the proximity of the centre to home was the top liked attribute (20.6%), whilst the reasons of having the centre being close to work or friends/relatives were much less important. These responses are similar to responses for other centres in the Borough.

In relation to accessibility, respondents mentioned factors liked as follows: easy to find parking spaces (8.9%), good bus service (2.6%), cheap car parking (1.6%), pedestrianised areas (1.5%), good train service (1.2%), easy to get there on foot (1.1%), free car parking (1.0%), good disabled access (0.5%) and easy to get there by car (0.4%).

Survey respondents were also asked what improvements would make them visit Redhill town centre more often. The most mentioned improvement relating to accessibility to the centre and mobility/movement around the centre were the availability of more car parking spaces (5.3%), free parking (5.1%) and cheaper parking (3.1%).

Environmental Quality

Redhill is a relatively bustling town centre, based around a pedestrianised crossroad intersection, pillared by the two main covered shopping centres – The Quadrant (including the Sainsbury's superstore) and The Belfry – at its northern and southern ends, respectively. The centre has a mix of retail, residential and offices, including modern mixed-use apartment block clusters. It is easily walkable and close to public transport stops and stations. There is a medium-high level of vehicular traffic going through the town centre during daytime hours.

Redhill has a constant flow of people coming through the centre, especially on their street market days, while the side streets are quieter, although not uncomfortably so. The open-air street market at Redhill occurs every Thursday, Friday, and Saturday, from 9am to 5pm, offering a variety of fresh ingredients, cooked foods, and household wares. The streetscape is generally clean with no instances of fly-tipping or graffiti observed. There are plenty of public

seating and areas to meet or gather throughout the centre, as well as a mixture of building façade types that line the pedestrianised parade, creating both shaded and non-shaded areas for people to use. Other infrastructure provided includes sheltered bicycle racks, litter bins and textured ground pavement with hidden drainage. There are indications of alfresco dining, which could be popular in the summer season. However, the centre lacks greenery, with landscaping limited to small-to-medium sized trees with built-in seats surrounding their trunks.

Directly adjacent to the north of the town centre boundary is Memorial Park, a large open green space which provides both playing fields and outdoor event spaces. The park is equipped with a children's playground and small café. Donyngs Leisure Centre is located further out west, 400m from the town centre.

The most liked attribute cited by the household survey respondents who had visited Redhill in the last twelve months was that it has a good market (6.2%). Followed by the familiarity of the place (4.9%) good shop layout (3.2%) and good shop opening hours (3.2%).

In terms of suggested improvements, respondents mostly mentioned better security & safety (6.7%), less empty shops (5.9%), more attractive & nicer environment (5.7%), nicer atmosphere & friendlier people (4.8%), updating & refurbishing the shopping area (4.1%), and cleaner & better maintained streets (3.5%).

The household survey demonstrated conflicting views when discussing the centre's environment and ambience; however, the level of satisfaction (factors liked by respondents) appears to be lower than the level of dissatisfaction (factors where improvements were suggested). Overall, respondents were happy with the shopping and service offer available, but rated the general environment and ambience that would make Redhill more attractive to visitors lower on the scale.

Occurrence of Crime

CrimeRate.co.uk measures 2,652 crimes reported in Redhill in 2022, indicating a crime rate of 71 crimes per 1,000 people. Redhill has the highest rate of crime of the four centres assessed in this study and compares poorly to Surrey's overall crime rate, which is 50 per 1,000 residents. However, as of 2024, Redhill's crime rate is 6% lower than the regional (South East) figure and 14% lower than the national (England, Wales and Northern Ireland) figure.

Of note, in the household survey, 6.7% of respondents who had visited Redhill in the last year mentioned higher security and/or better personal safety as a required improvement that would make them visit the centre more often, which is the highest proportion in the borough to do so.

Summary and SWOT Analysis

Strengths

- Good critical mass of retail units.
 - Healthy provision of comparison goods shops with a good balance between national multiples and independent operators as well as a broad range and choice of shops.
 - High proportion of both comparison store and convenience supermarket floorspace within the centre.
 - The vacancy rate is below the UK average for the proportion of vacant floorspace.
-

- Good perception and visitor satisfaction of the shops, services, and facilities available.
- Plenty of provision for car parking, including a few multi-storey car parks, which are relatively busy. This is reflected in the survey where in general, visitors perceive that it is easy to find available car parking.
- A number of new, modern mixed-use developments, including residential provision, have added to the vitality and viability of the town centre by increasing the indigenous population.
- The railway and bus/coach stations are directly connected to the primary shopping area of the town centre.
- Wide, largely pedestrianised centre with well-designed paving using a mixture of hard/soft materials and hidden drainage provide a clean, walkable, and legible space.
- Constant flow of people and reasonably high footfall coming through the centre on the high street.
- Holds a well-attended open-air market on the high street every Thursday to Saturday.

Weaknesses

- The two covered shopping centres (The Belfry and The Quadrant) are not fully utilised, with small vacant clusters, potentially detracting from them as a shopper's destination.
- The centre currently lacks a sufficient concentration of pubs & bars and hot food takeaways, as well as other evening uses. This impacts the attraction and level of footfall to the core pedestrianised area of the centre outside of daytime shopping hours.
- The centre lacks green space within the town centre itself. Whilst the centre is located close to Redhill Memorial Park, access is hindered by limited pedestrian routes.
- The town has a high crime rate, relative to the other centres in the borough, and visitors' perceptions of security and safety suggest it warrants improvement.

Opportunities

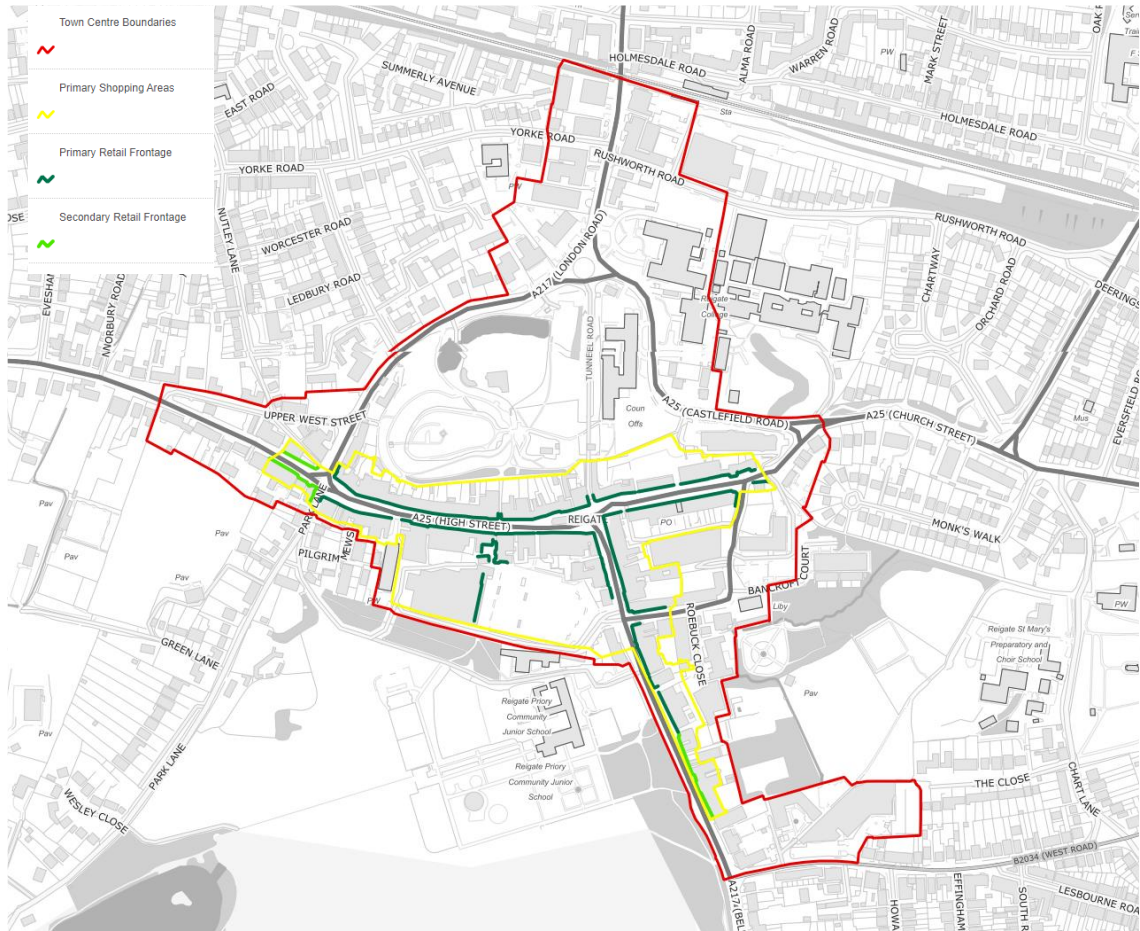
- The roundabout between the train station and town centre has the potential to be improved in terms of its environmental quality. Design landscape features and improved pedestrian routes could cultivate a sense of arrival and decrease its capacity to act as a barrier.
- Opportunity to build on the presence and success of the centre's theatre and cinemas to further strengthen the evening economy with complementary uses.
- Build on the success of the street market through links to other town centre events.
- Redhill has recently won a bid in October 2023 to receive £330k in government funding under the Safer Streets initiative, focussing on measures to tackle anti-social behaviour and violence against women and girls.
- Vacant units coupled with relatively high retailer demand could provide opportunities for new investors, start-ups, and innovative concepts.

Threats

- The centre is constrained by the surrounding road network, restricting growth.
-

- The temporary closure of the Harlequin Centre (theatre and cinema) and Redhill Library, due to the discovery of reinforced autoclaved aerated concrete (RAAC), will have reduced footfall to the area and affect businesses in that part of the centre. It is still undetermined when the venues will reopen. Notably, efforts are underway to minimise the impacts through innovations such as a pop-up show space within The Belfry shopping centre.

REIGATE TOWN CENTRE



Mix of Uses

Reigate was designated as a Town Centre in the Reigate & Banstead Core Strategy (2014). It has 188 retail and service units (excluding office and leisure & community uses), and the mix of uses is set out in Table 7, which is compared with the Borough and UK averages. The ground floor area in the centre totals 30,354 sq.m gross, and the mix of floorspace is shown in Table 8. Reigate is the second largest town centre in the Borough. Reigate is a historic market town with the former Reigate Castle and Baron’s Cave located in the town centre.

There were 11 vacant units within the centre at the time of the Council’s 2023 land use survey, equating to a shop vacancy rate of 5.9%, which is lower than the Borough average and significantly lower than the UK average. The low vacancy rate reflects the high percentage of comparison goods retail provision.

Table 7 Mix of retail and service uses – Reigate town centre

Type	Number of units	% units	% units Borough average	% units UK average
Comparison retail	77	41.0	27.5	28.8
Convenience retail	9	4.8	10.7	9.8
Financial / Professional	16	8.5	9.5	8.8

Type	Number of units	% units	% units Borough average	% units UK average
Restaurant / Café	29	15.4	12.4	10.4
Public house / Bar	7	3.7	2.3	5.1
Hot food takeaway	5	2.7	5.4	6.4
Other non-retail services	34	18.1	22.6	16.2
Vacant units	11	5.9	9.5	14.5
Total	188	100.0	100.0	100.0

Source: RBBC Land Use Survey July 2023 and Goad Plan UK average.

Table 8 Mix of retail and service floorspace – Reigate town centre

Type	Area of floorspace sq.m	% floorspace	% floorspace UK average
Comparison retail	11,497	39.7	33.8
Convenience retail	6,875	28.9	17.7
Financial / Professional	2,079	5.5	7.1
Restaurant / Café	4,753	8.8	7.9
Public house / Bar	980	1.2	6.5
Hot food takeaway	439	0.2	3.4
Other non-retail services	2,419	4.1	8.2
Vacant units	1,312	11.6	15.3
Total	30,354	100.0	100.0

Source: RBBC Land Use Survey July 2023 and Goad Plan UK average.

The composition mix of uses in Reigate broadly reflects the national average, but there are some differences. The centre has a high proportion of comparison retailers when compared with both the Borough and UK averages. There is also a relatively high proportion of restaurant & cafés. However, there is a low provision of convenience goods shops – the lowest in the Borough. The provision of hot food takeaways in the centre is also below average. A more detailed breakdown of comparison goods retail outlets and non-retail services is shown in Tables 9 and 10.

Reigate has 77 comparison goods retail shops, the highest in the Borough, but the amount of comparison goods floorspace is lower than Redhill. There is a good range and choice of shops, with 12 of the 14 Goad Plan shop categories represented, as shown in Table 9. The mix of comparison retail uses is largely consistent with the national averages, however there are higher concentrations of the books, arts, cards & stationers, and china, glass & gifts categories, whilst a limited representation of the electrical, music & photography category. There are no cars, motorcycles & accessories, and variety, department & catalogue shops in the centre.

Reigate has a good range and choice of non-retail services (91 units), as shown in Table 10, the highest in the Borough. The food and beverage offer is significantly high for restaurants & cafés, with over a third of non-retail service units dedicated to this use. The provision of pubs & bars and hot food takeaways stands at a much lower proportion than the national averages. There is also a good provision of estate agents & valuers, hairdressers & beauty parlours, and launderettes & dry cleaners, although at a similar rate to Borough averages. Meanwhile, there is

a relatively low proportion of banks & other financial services, and betting shops & amusement centres.

Table 9 Mix of comparison goods retail uses – Reigate town centre

Type	Number of units	% units	% units Borough average	% units UK average
Clothing and footwear	18	23.4	13.6	21.1
Furniture, carpets and textiles	7	9.1	13.6	7.5
Books, arts, cards and stationers	8	10.4	6.0	6.2
Electrical, music and photography	4	5.2	6.0	9.3
DIY, hardware and homeware	4	5.2	7.2	7.0
China, glass and gifts	6	7.8	4.0	5.7
Cars, motorcycles and accessories	0	0.0	0.8	1.2
Chemists, drugstores and opticians	9	11.7	15.6	12.1
Variety, department and catalogue	0	0.0	1.6	1.6
Florists, nurserymen and seedsmen	1	1.3	2.8	2.2
Toys, hobby, cycle and sports	5	6.5	6.8	5.5
Jewellers	5	6.5	3.6	5.1
Charity and second-hand shops	6	7.8	10.0	9.9
Other comparison goods retailers	4	5.2	8.4	5.6
Total	77	100.0	100.0	100.0

Source: RBBC Land Use Survey July 2023 and Goad Plan UK average.

Table 10 Mix of non-retail service uses – Reigate town centre

Type	Number of units	% units	% units Borough average	% units UK average
Restaurant / café	29	35.4	28.1	24.6
Public house / bar	7	8.5	5.2	22.0
Hot food takeaway	5	6.1	12.2	11.4
Bank / other financial service	3	3.7	6.1	11.3
Betting shop / amusement	1	1.2	2.3	6.7
Estate agent / valuer	12	14.6	12.0	6.2
Travel agent	2	2.4	0.7	1.1
Hairdresser / beauty parlour	20	24.4	29.0	15.5
Launderette / dry cleaner	3	3.7	4.5	1.1
Sub-total	82	100.0	100.0	100.0
Other non-retail services	9			
Total	91			

Source: RBBC Land Use Survey July 2023 and Goad Plan UK average.

There is a good selection of national multiple retailers, as set out in Table 11, and other small independent stores.

Table 11 Multiple retailers – Reigate town centre

Comparison		Convenience	Food and Beverage
Accessorize	Mountain Warehouse	Holland & Barrett	Bill's
Balfe's Bikes	Oliver Bonas	M&S Simply Food	Café Rouge
Benefit	Oxfam	Majestic Wine	Costa Coffee
Boots	Phase Eight	Morrisons	Cote
Boots Opticians	Richer Sounds	The Vineking	Domino's
British Heart Foundation	Space NK		Gail's
Cancer Research UK	Specsavers		Giggling Squid
Card Zone	St Catherine's Hospice		Nando's
Carpetright	Sweaty Betty		Pizza Express
Crew Clothing Co	The Bed Post		Pizza Hut
Day Lewis Pharmacy	The Children's Trust		Pret a Manger
Dreams	Vision Express		Starbucks
Jojo Maman Bebe	Waterstones		Wagamama
Jo Malone	Whistles		
Jones	White Stuff		
Fatface	WHSmith		

Source: RBBC Land Use Survey July 2023.

Customer Views

As part of the household survey, respondents across the study area were asked if they had used shop, services or leisure facilities in Reigate town centre in the last 12 months. 58.8% of respondents in the study area had visited Reigate, which was the highest figure in the Borough. Of those who had used shops and services in Reigate, respondents were asked what they liked about the town centre and what improvements would make them visit more often. The most liked factor for Reigate was good cafés and restaurants (35.6%). Other main factors mentioned were:

- *factors liked:* good range of independent shops (31.9%); attractive environment / nice place (14.8%); nice atmosphere / friendly people (13.0%); good range of non-food shops generally (9.1%); open / green spaces (8.0%); close to home (7.7%); good range of clothes shops (6.8%); good range of supermarkets (6.6%); easy to find parking spaces (6.1%); good range of quality shops (6.0%); good leisure facilities (e.g. leisure centres, cinema, health and fitness clubs, etc.) (6.0%); and good pubs / bars (5.6%).
- *suggested improvements:* more car parking spaces (19.7%); less traffic congestion / improved access (11.3%); more affordable shops (5.9%); and more / better clothes shops (5.1%).

These household survey results suggest that there are much higher levels of satisfaction than dissatisfaction with Reigate town centre.

Catchment Area

The household survey results indicate 58.8% of respondents had visited shops, services or leisure facilities in Reigate town centre during the last year, which was the highest figure in the

Borough. 4.6% of households in the study area do most of their other non-food shopping in Reigate town centre, which is the second highest percentage in the Borough behind Redhill.

The retail capacity analysis suggests Reigate attracts 9.2% of all comparison goods expenditure within the study area, with a reasonable level of trade drawn from Zone 1 – Reigate, Zone 2 – Redhill and Zone 6 – Tadworth.

The combined base year turnover of Reigate is estimated to be £259 million, the highest turnover of the four main centres in the Borough. This turnover is split £76 million for convenience retail goods, £82 million for comparison retail goods and £102 million for food/beverage.

Reigate has a reasonably large catchment area when compared with Banstead and Horley. It has a varied mixed trading base, with a particularly strong attraction of food and beverage trips.

Rental Levels

According to the VOA, Reigate has the highest prime Zone A retail rents of the four centres assessed in the Borough. The prime Zone A retail rent is £800 per sq.m, which is about a third more than the next highest at Redhill with £592.30 per sq.m, and almost triple that of Horley where it is £275 per sq.m. These figures suggest rental levels are very strong for a centre of its size and indicate occupier demand is well above the supply of available premises. Zone A retail rents vary throughout the centre. Zone A rents range from £350 to £800 per sq.m in the prime pitch along High Street, with rents generally decreasing the further away from the main intersection, as would be expected. Perpendicular to High Street is Bell Street, where Zone A rents are between £300 to £400 per sq.m. Following on to the east of High Street is Church Street, where Zone A rents are on the lower end between £300 to £350 per sq.m.

Accessibility

Reigate Railway Station is approximately 500m from the centre of the primary shopping area and lies just outside the town centre boundary to the north. The station has two passenger platforms and features a part-time ticket office with a waiting room. The station serves Southern and Great Western Railway (GWR) routes, which offers hourly services towards London via Croydon, as well as to Reading, Basingstoke, Tonbridge and Gatwick Airport.

Reigate does not contain a main bus/coach station and has relatively few bus stops scattered throughout for a centre of its size. The buses at Reigate serve routes mainly to Redhill, but also to Banstead, Sutton, Epsom, Dorking, Guildford and Gatwick Airport.

There are five car parks, including one multi-storey at Bancroft Road, offering 709 spaces within Reigate town centre. All car parks are managed by the Council aside from the car park at Reigate Station, which is privately run by APCOA Parking. These car parks are generally evenly spaced out around the circumference of the hill on which the grounds of Reigate Castle is located, and accessible to the High Street, which is a narrow but relatively busy thoroughfare with limited on-street parking space. On-street parking is available on Church Street and further down Bell Street.

At Council car parks, parking charges are shown in Table 12 below, where the Town Hall and London Road car parks charge only on weekends:

Table 12 Car parking charges – Reigate town centre

Locations	Monday - Saturday							Sunday & Bank Holiday		
	<20 mins	<1 hr	<2 hrs	<3 hrs	<4 hrs	<5 hrs	<10 hrs	<2 hrs	<4 hrs	4+ hrs
Bancroft Road	£0.40	£1.50	£2.40	£3.00	£4.00	£4.50	£6.80	£1.00	£2.00	£4.00
Upper West Street	£0.50	£1.40	£2.40	£3.00	£3.90	£4.50	£6.80	£1.00	£2.00	£4.00
Town Hall (weekends only)	£0.40	£1.50	£2.40	£3.00	£4.00	£4.50	£6.80	£1.00	£2.00	£4.00
London Road (weekends only)	£0.40	£1.50	£2.40	£3.00	£4.00	£4.50	£6.80	£1.00	£2.00	£4.00

Source: RBBC website.

In relation to accessibility, respondents of the household survey who had visited Reigate in the past year mentioned factors liked as follows: close to home (7.7%), easy to find parking spaces (6.1%), easy to get there on foot (2.2%), close to friends / relatives (2.1%), close / enroute to work (1.5%), free car parking (1.3%), good disabled access (0.9%), easy to get there by car (0.8%), close to school (0.7%), cheap car parking (0.7%), pedestrianised areas (0.3%), no pedestrianised areas (0.3%) and good bus service (0.2%).

Survey respondents were also asked what improvements would make them visit Reigate town centre more often. The most mentioned improvement relating to accessibility to the centre and mobility/movement around the centre were the availability of more car parking spaces (19.7%), less traffic congestion / improved access (11.3%), cheaper parking (4.7%) and free parking (4.6%).

Environmental Quality

Reigate is a historic market town, set on a T-junction. The former Reigate Castle's grounds and caves within the town centre to the north, and the vast expanse of both Priory and Reigate Parks to the south, provides the centre with cultural interest and open green landscape. Although situated just outside the town centre boundary, the parks are easily accessible and walkable from the shopping areas. The parks are fitted with supporting infrastructure such as a pond, a playground, a café, a variety of seating options including picnic benches, bins, a fountain garden, a skate park, tennis courts, football goalposts and a number of walking paths to navigate around the tree-covered hillock.

There was a high level of pedestrian footfall throughout the centre at the time of our site visits, in addition to road traffic through the centre the detracted from the overall environment as a result of the lack of clear pedestrian crossing points. The pavement lining both sides of the street is wide and flat, interspersed with street lighting, litter bins and planters at regular intervals, whilst the centre lacks seating and clear meeting points detract from an otherwise picturesque centre.

The most liked attribute cited by the household survey respondents who had visited Reigate in the last twelve months was that it has an attractive environment and/or is a nice place (14.8%). Other main factors liked by the respondents were the nice atmosphere / friendly people (13.0%), open / green spaces (8.0%), traditional / quaint (4.8%) and good shop layout (4.5%). In terms

of suggested improvements, the most common request were fewer empty shops (3.0%), more pedestrianised areas (2.9%), and shops to be open for longer hours (2.8%).

The household survey, as would be expected, expressed conflicting views when discussing the centre's environmental quality; however, the level of satisfaction (factors liked by respondents) appears to be greatly higher than the level of dissatisfaction (factors where improvements were suggested). Overall, respondents indicated that they liked Reigate's character, spatial environment, atmosphere and traditional quaintness. In comparison to the other centres across the Borough, respondents had relatively few comment about ways to enhance the centre (37.8% of respondents, the highest in the borough, recording that there was nothing to improve).

Occurrence of Crime

CrimeRate.co.uk indicates there were 1,139 crimes reported in Reigate in 2022, indicating a crime rate of 48 crimes per 1,000 people. This compares favourably to Surrey's overall crime rate, which is 50 per 1,000 residents. As of 2024, Reigate's crime rate is 36% lower than the regional (South East) figure and 42% lower than the national (England, Wales and Northern Ireland) figure. Reigate is the only centre of the four assessed in this study with a crime rate lower than Surrey's average, and thus, has the lowest rate of crime of the centres in the borough.

Of note, in the household survey, only a minimal 0.5% of respondents who had visited Reigate in the last year mentioned higher security and/or better personal safety as a required improvement that would make them visit the centre more often, which is the lowest proportion in the Borough to do so.

Summary and SWOT Analysis

Strengths

- Good critical mass of retail units.
- Very healthy provision of comparison goods outlets and convenience supermarkets, by proportion of units and floorspace, within the centre.
- Good balance between national multiple and independent operators, with a wide range and choice of shops.
- Strong offering of high-quality restaurants and cafés, including chain franchises, contributing to a regional draw.
- The vacancy rate is below the Borough and UK averages for both the number of vacant units and proportion of vacant floorspace.
- The town has a low crime rate and a good perception of safety and security.
- Reigate is rated highly by visitors in terms of environmental quality when compared with other centres in the Borough.
- The town centre architecture, former castle grounds and caves, and open green park spaces, provide an attractive historic and cultural environment, which makes the town a pleasant place to visit.

Weaknesses

- The town suffers from heavy traffic congestion along its high street, with limited crossing points, providing some barriers to pedestrian movement.
-

- The shop unit sizes are primarily narrow and limited in size due to the historic nature of the centre, which could limit the possibility for larger-format stores.
- The railway station is situated relatively far from the centre and blocked off by the hill of the Reigate Castle grounds, giving it a poor sense of arrival.

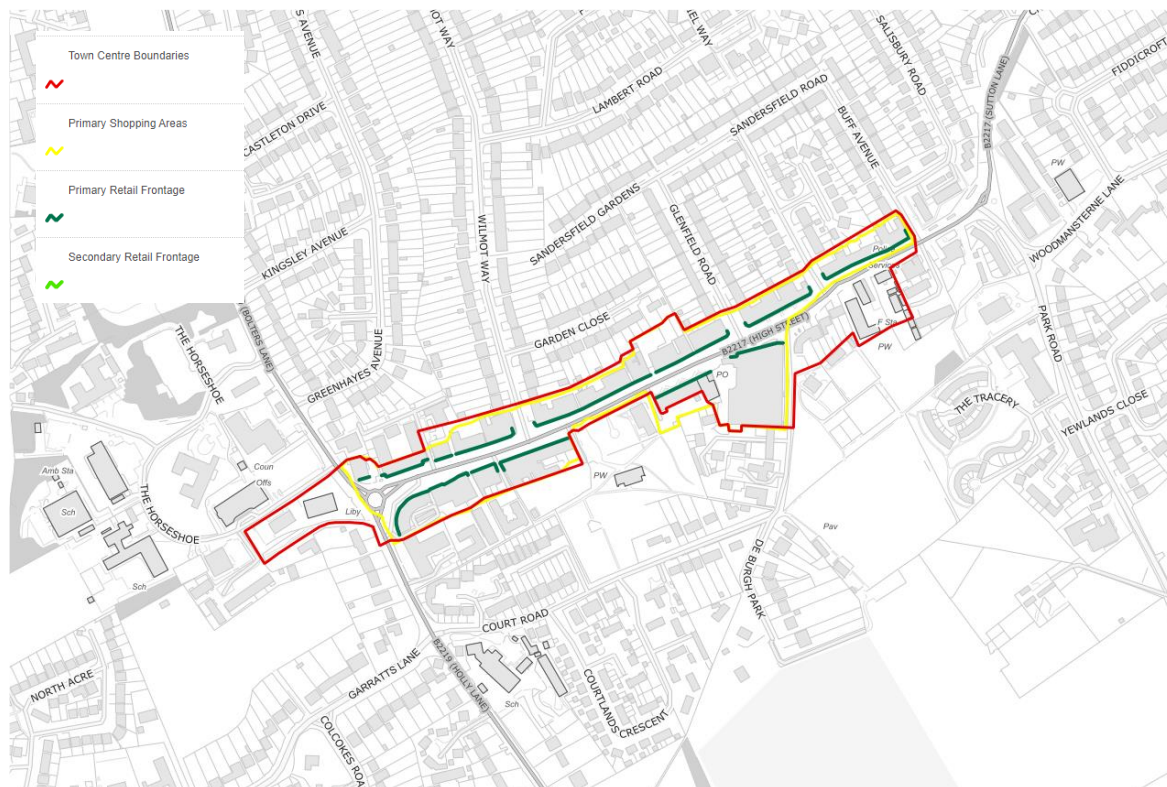
Opportunities

- As a popular shopping and dining destination, there is an opportunity to enhance the clock tower area as a meeting point.
- An increased 'staycation' demand could increase the number of visitors to the town, providing spin-off benefits to shops and services in the town centre.
- The attraction of Reigate's restaurants and cafés provide opportunities for promotions to other town centre events.
- Related to traffic congestion and as reflected in the household survey views, there are opportunities for more pedestrianised areas, road crossings and better seating infrastructure within the centre.

Threats

- The historic character of Reigate, particularly in terms of the conservation area designation for the entirety of the town centre and statutorily Listed buildings, could restrict the growth ambitions of existing retailers, as well as new modern operators, due to the lack of availability of larger and flexible units to cater for new and experimental store formats.
 - A limited number of vacant stores coupled with relatively high retailer demand will dampen opportunities for new investors, start-ups, and innovative concepts.
-

BANSTEAD TOWN CENTRE



Mix of Uses

Banstead was designated as a Town Centre in the Reigate & Banstead Core Strategy (2014). It has 111 retail and service units (excluding office and leisure & community uses), and the mix of uses is set out in Table 13, which is compared with the Borough and UK averages. The total ground floor area of these units totals 15,579 sq.m gross, and the mix of floorspace is shown in Table 14. Banstead is the third largest town centre in the Borough in terms of number of units and the smallest town centre in terms of commercial floorspace.

Table 13 Mix of retail and service uses – Banstead town centre

Type	Number of units	% units	% units Borough average	% units UK average
Comparison retail	38	34.2	27.5	28.8
Convenience retail	12	10.8	10.7	9.8
Financial / Professional	11	9.9	9.5	8.8
Restaurant / Café	17	15.3	12.4	10.4
Public house / Bar	0	0.0	2.3	5.1
Hot food takeaway	5	4.5	5.4	6.4
Other non-retail services	24	21.6	22.6	16.2
Vacant units	4	3.6	9.5	14.5
Total	111	100.0	100.0	100.0

Source: RBBC Land Use Survey July and Goad Plan UK average.

There were 4 vacant units within the centre at the time of the Council's 2023 land use survey, equating to a shop vacancy rate of only 3.6%, which is the lowest in the Borough and substantially lower than both the Borough and UK averages. The very low vacancy rate suggests operator demand currently exceeds the supply of shop premises available.

Table 14 Mix of retail and service floorspace – Banstead town centre

Type	Area of floorspace sq.m	% floorspace	% floorspace UK average
Comparison retail	4,414	28.3	33.8
Convenience retail	4,850	31.1	17.7
Financial / Professional	1,094	7.0	7.1
Restaurant / Café	2,751	17.7	7.9
Public house / Bar	0	0.0	6.5
Hot food takeaway	431	2.8	3.4
Other non-retail services	1,417	9.1	8.2
Vacant units	622	4.0	15.3
Total	15,579	100.0	100.0

Source: RBBC Land Use Survey July 2023 and Goad Plan UK average.

The centre has a significantly higher proportion of comparison retailers compared with both the Borough and UK averages, and this is supported by the very low vacancy rate. The centre also has a relatively high proportion of restaurant/café and other non-retail services. There is a good provision of convenience retail shops, comparable to the Borough and UK averages. There are no pubs/bars located in the centre. A more detailed breakdown of comparison goods retail outlets and non-retail services is shown in Tables 15 and 16.

Table 15 Mix of comparison goods retail uses – Banstead town centre

Type	Number of units	% units	% units Borough average	% units UK average
Clothing and footwear	7	18.4	13.6	21.1
Furniture, carpets and textiles	5	13.2	13.6	7.5
Books, arts, cards and stationers	1	2.6	6.0	6.2
Electrical, music and photography	0	0.0	6.0	9.3
DIY, hardware and homeware	3	7.9	7.2	7.0
China, glass and gifts	2	5.3	4.0	5.7
Cars, motorcycles and accessories	0	0.0	0.8	1.2
Chemists, drugstores and opticians	9	23.7	15.6	12.1
Variety, department and catalogue	0	0.0	1.6	1.6
Florists, nurserymen and seedsmen	1	2.6	2.8	2.2
Toys, hobby, cycle and sports	0	0.0	6.8	5.5
Jewellers	1	2.6	3.6	5.1
Charity and second-hand shops	8	21.1	10.0	9.9
Other comparison goods retailers	1	2.6	8.4	5.6
Total	38	100.0	100.0	100.0

Source: RBBC Land Use Survey July 2023 and Goad Plan UK average.

Banstead has 38 comparison goods retail shops, the third highest of the centres in the Borough. There is an appropriate range and choice of shops, with 10 of the 14 Goad Plan shop categories represented, as shown in Table 15. There is a high concentration of furniture, carpets & textiles shops, as well as a very high representation of chemists, drugstores & opticians, and charity & second-hand shops, with both the latter categories doubling national averages while also surpassing their respective Borough averages. There is less representation of categories including books, arts, cards & stationers, jewellers, and other comparison goods retailers, and no shops from the electrical, music & photography, cars, motorcycles & accessories, variety, department & catalogue, and toys, hobby, cycle & sports categories.

Banstead has a reasonable range and choice of non-retail services (57 units), as shown in Table 16. In terms of the food and beverage offer, there is a strong provision of restaurants & cafés, making up a third (34.0%) of all non-retail service units. There are, however, no pubs or bars within the centre with The Woolpack pub located just beyond the eastern edge of the town centre boundary. There is a high proportion of estate agents & valuers, hairdressers & beauty parlours, and launderettes & dry cleaners, and relatively few banks & other financial services.

Table 16 Mix of non-retail service uses – Banstead town centre

Type	Number of units	% units	% units Borough average	% units UK average
Restaurant / café	17	34.0	28.1	24.6
Public house / bar	0	0.0	5.2	22.0
Hot food takeaway	5	10.0	12.2	11.4
Bank / other financial service	2	4.0	6.1	11.3
Betting shop / amusement	2	4.0	2.3	6.7
Estate agent / valuer	8	16.0	12.0	6.2
Travel agent	0	0.0	0.7	1.1
Hairdresser / beauty parlour	14	28.0	29.0	15.5
Launderette / dry cleaner	2	4.0	4.5	1.1
Sub-total	50	100.0	100.0	100.0
Other non-retail services	7			
Total	57			

Source: RBBC Land Use Survey July 2023 and Goad Plan UK average.

There is a reasonable mix of national multiple retailers, as set out in Table 17, a number of which are charity stores. The multiples are supported by small independent stores.

Table 17 Multiple retailers – Banstead town centre

Comparison		Convenience	Food and Beverage
Boots	St Raphael's Hospice	Marks and Spencer	Caffe Nero
Boots Opticians	Superdrug	Tesco Express	Costa Coffee
Cancer Research UK	The Children's Trust	Waitrose	Domino's
Oxfam			Papa John's
Pearl Chemist			Pizza Express
Princess Alice Hospice			Pizza Hut

Comparison		Convenience	Food and Beverage
Queen Elizabeth's Foundation (QEF)			Prezzo
Robert Dyas			Starbucks
Specsavers			Zizzi

Source: RBBC Land Use Survey July 2023.

Customer Views

As part of the household survey, respondents across the study area were asked if they had used shop, services or leisure facilities in Banstead town centre in the last 12 months. 40.4% of respondents in the study area had visited Banstead, which was the third highest figure of the four centres in the Borough. Of those who had used shops and services in Banstead, respondents were asked what they liked about the town centre and what improvements would make them visit more often. The main factor liked about Banstead town centre was 27.6% mentioning that it was close to home. The other main factors mentioned were:

- *factors liked:* good cafés / restaurants (19.0%); good range of independent shops (15.7%); easy to find parking spaces (15.0%); good range of supermarkets (12.6%); nice atmosphere / friendly people (11.7%); good range of charity shops (8.9%); ability to get everything needed (7.7%); attractive environment / nice place (7.1%); traditional / quaint (6.2%); good range of non-food shops generally (6.1%); and good pubs / bars (5.0%).
- *suggested improvements:* more car parking spaces (16.9%); more / better range of non-food shops generally (9.2%); less charity shops (6.7%); free car parking (6.2%); more / better clothes shops (6.1%); more / better cafés / restaurants (5.4%); less empty shops (5.2%); and more / better financial services (e.g. banks / building societies) (5.0%).

These household survey results suggest that there are higher levels of satisfaction than dissatisfaction with Banstead town centre.

Catchment Area

The household survey results indicate that Banstead only attracts 3.1% of all comparison goods expenditure within the study area, with most trade coming from the local area, i.e. Zone 5 – Banstead.

The combined base year turnover of Banstead is estimated to be £150 million. This turnover is split £64 million for convenience retail goods, £28 million for comparison retail goods and £58 million for food & beverage.

Banstead has a relatively small, localised catchment area, but has a reasonably mixed trading base. The attraction of food & beverage trips is particularly strong for a centre of its size, whilst comparison goods draw is much weaker.

Rental Levels

According to the VOA, Banstead has the third highest prime Zone A retail rents of the four centres assessed in the Borough. The prime Zone A retail rent is £500 per sq.m, which suggest that rental levels are strong for a centre of its size, further demonstrating that occupier demand exceeds the supply of available premises. Zone A retail rents vary only slightly across the linear

centre, with Zone A rents along High Street ranging from £325 to £500 per sq.m and higher rates identified moving towards the western end of High Street.

Accessibility

Banstead Railway Station is located about 1km north-west and outside of the town centre boundary. The station is unmanned and has only one track that accommodates trains from both ways. Trains operated by Southern to Epsom Downs and London Victoria via Sutton run every 30 minutes.

Banstead does not contain a main bus/coach station, but has several bus stops along the high street. The buses at Banstead serve routes to Epsom, Sutton and Mitcham.

Banstead town centre features one car park (managed by the Council), offering 91 spaces. An additional (privately run) car park is directly adjacent to the west of the town centre boundary, at The Horseshoe. The car parks are both easily accessible to the main shopping area, where there is also plenty of on-street car parking available.

The parking charges at the Council car park is shown in Table 18 below:

Table 18 Car parking charges – Banstead town centre

Location	Monday - Saturday							Sunday & Bank Holiday
	<20 mins	<1 hr	<2 hrs	<3 hrs	<4 hrs	<5 hrs	<10 hrs	flat fee
High Street	£0.50	£1.40	£1.90	£2.40	£3.00	£4.40	£5.50	£1.00

Source: RBBC website.

Of the household survey respondents who had visited Banstead in the past year, the most liked attribute was the proximity of the centre to home (27.6%), similarly to Redhill. However, the centre being close to work or friends/relatives were much less important for visitors to Banstead. These responses are similar to responses for other centres in the Borough.

In relation to accessibility, respondents mentioned factors liked as follows: easy to find parking spaces (15.0%), easy to get there on foot (4.4%), free car parking (2.0%), easy to get there by car (1.6%), good bus service (1.5%), pedestrianised areas (1.1%) and easy access (0.2%).

Survey respondents were also asked what improvements would make them visit Banstead town centre more often. The most mentioned improvement relating to accessibility to the centre and mobility/movement around the centre were the availability of more car parking spaces (16.9%), free parking (6.2%) and cheaper parking (4.0%).

Environmental Quality

Banstead is small, with public infrastructure spreading beyond the town centre boundary, and retains a relaxed, local-village atmosphere. The high street is flanked on either side by broad pavement, with buildings set back from the street and a variety of seating, greenery, trees, planters, bins, and bike stands. On-street car parking and active frontages also contribute to the sense of safety and protection of the centre's walkable areas.

The most liked attribute cited by the household survey respondents who had visited Banstead in the last twelve months was that it has a nice atmosphere and/or friendly people (11.7%). Other main factors liked by the respondents were the attractive environment / nice place (7.1%),

traditional / quaint (6.2%) and good shop layout (3.4%). In terms of suggested improvements, respondents mostly mentioned fewer empty shops (5.2%) and better security / safety (2.4%).

The household survey expressed some conflicting views when discussing the centre's environment and ambience; however, the level of satisfaction (factors liked by respondents) appears to be higher than the level of dissatisfaction (factors where improvements were suggested). Generally, Banstead was rated highly by visitors for environmental quality.

Occurrence of Crime

CrimeRate.co.uk indicates there were 529 crimes reported in Banstead in 2022, indicating a crime rate of 52 crimes per 1,000 people. This is comparable to Surrey's overall crime rate, which is 50 per 1,000 residents. However, as of 2024, Banstead's crime rate is a substantial 31% lower than the regional (South East) figure and 37% lower than the national (England, Wales, and Northern Ireland) figure. Banstead has the second lowest rate of crime of the four centres assessed in this study.

Of the household survey respondents who had visited Banstead in the last year, 2.4% mentioned higher security or better personal safety as a required improvement that would make them visit more often.

Summary and SWOT Analysis

Strengths

- Healthy provision of comparison and convenience retail stores, complementing the array of independent retailers within the centre.
- There is a good range of restaurants & cafés for a centre of its size.
- The vacancy rate is the lowest in the Borough, and substantially lower than the national average for both the number of vacant units and proportion of vacant floorspace.
- The net satisfaction level is relatively high as rated by visitors to the centre in terms of environmental quality.
- The town centre is easily legible and walkable.
- The town has a relatively low crime rate.
- The results of the Banstead Village in Bloom community initiative for landscaping and gardening can be seen through the planted greenery throughout the centre.

Weaknesses

- The train station is located outside of the town centre.

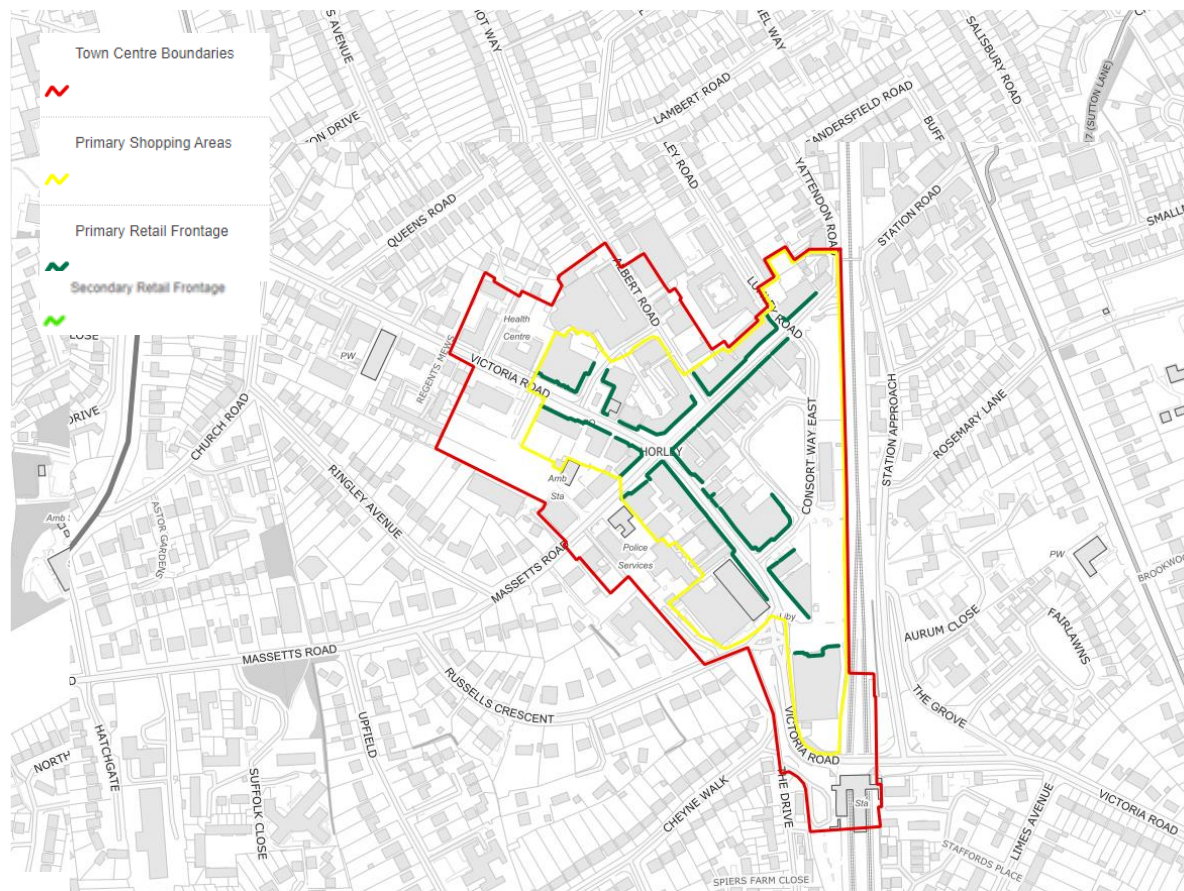
Opportunities

- The Mayfield Lavender Farm fields and shop (a tourist destination in the spring and summer months) are located nearby. This provides opportunities to make better use of this linkage through events, festivals and related shopping and dining campaigns.
 - There are no pubs/bars within the town centre boundary. However, directly next to the eastern edge is The Woolpack, a gastropub which holds weekly quiz nights and live jazz music.
-

Threats

- The centre is only easily accessible by bus, reducing potential footfall.
- A limited number of vacant stores coupled with relatively high retailer demand will dampen opportunities for new investors, start-ups, and innovative concepts.

HORLEY TOWN CENTRE



Mix of Uses

Horley was designated as a Town Centre in the Reigate & Banstead Core Strategy (2014). It has 108 retail and service units (excluding office and leisure & community uses), and the mix of uses is set out in Table 19, which is compared with the Borough and UK averages. The total ground floor area of these units totals 22,241 sq.m gross, and the mix of floorspace is shown in Table 20. Horley is the smallest town centre in terms of number of units and the third largest town centre in terms of commercial floorspace area in the Borough.

There were 9 vacant units within the centre at the time of the Council's 2023 land use survey, equating to a shop vacancy rate of 8.3%, which is similar to the Borough average and lower than the UK average. The low vacancy rate suggests operator demand currently exceeds the supply of shop premises available.

The centre has a slightly lower proportion of comparison retailers compared with both the Borough and UK averages, and it is the only centres in the Borough to feature a lower percentage of comparison retail shops than the UK average. The centre also has a lower than average proportion of convenience retailers. The centre has a higher proportion of financial & professional services and other non-retail services.

A more detailed breakdown of comparison goods retail outlets and non-retail services is shown in Tables 21 and 22.

Table 19 Mix of retail and service uses – Horley town centre

Type	Number of units	% units	% units Borough average	% units UK average
Comparison retail	25	23.1	27.5	28.8
Convenience retail	8	7.4	10.7	9.8
Financial / Professional	16	14.8	9.5	8.8
Restaurant / Café	13	12.0	12.4	10.4
Public house / Bar	4	3.7	2.3	5.1
Hot food takeaway	7	6.5	5.4	6.4
Other non-retail services	26	24.1	22.6	16.2
Vacant units	9	8.3	9.5	14.5
Total	108	100.0	100.0	100.0

Source: RBBC Land Use Survey July 2023 and Goad Plan UK average.

Table 20 Mix of retail and service floorspace – Horley town centre

Type	Area of floorspace sq.m	% floorspace	% floorspace UK average
Comparison retail	6,860	30.8	33.8
Convenience retail	6,318	28.4	17.7
Financial / Professional	1,215	5.5	7.1
Restaurant / Café	1,433	6.4	7.9
Public house / Bar	1,139	5.1	6.5
Hot food takeaway	1,323	5.9	3.4
Other non-retail services	2,470	11.1	8.2
Vacant units	1,483	6.7	15.3
Total	22,241	100.0	100.0

Source: RBBC Land Use Survey July 2023 and Goad Plan UK average.

Horley has 25 comparison goods retail shops, the lowest of all the centres in the Borough. There is a limited range and choice of shops, with 9 of the 14 Goad Plan shop categories represented. Of these categories, there is a significantly higher concentration of furniture, carpets & textiles, chemists, drugstores & opticians, charity & second-hand shops, and other comparison goods retailers, all at around double the UK average rates.

There is a more limited representation of categories including clothing & footwear, electrical, music & photography, DIY, hardware & homeware, china, glass & gifts, and jewellers. There are no shops representing the books, arts, cards & stationers, cars, motorcycles & accessories, variety, department & catalogue, florists, nurserymen & seedsmen, and toys, hobby, cycle & sports categories.

Horley features a wide range and choice of non-retail services (66 units), as shown in Table 22. There is a healthy provision of restaurants & cafés and hot food takeaways; however, provision of pubs & bars is low compared to the national average.

There is high proportion of hairdressers & beauty parlours, and launderettes & dry cleaners, and particularly estate agents & valuers at triple the national average. Provision of banks & other financial services, and betting shops & amusement centres is relatively limited in comparison with other centres in the UK.

Table 21 Mix of comparison goods retail uses – Horley town centre

Type	Number of units	% units	% units Borough average	% units UK average
Clothing and footwear	3	12.0	13.6	21.1
Furniture, carpets and textiles	4	16.0	13.6	7.5
Books, arts, cards and stationers	0	0.0	6.0	6.2
Electrical, music and photography	1	4.0	6.0	9.3
DIY, hardware and homeware	1	4.0	7.2	7.0
China, glass and gifts	1	4.0	4.0	5.7
Cars, motorcycles and accessories	0	0.0	0.8	1.2
Chemists, drugstores and opticians	6	24.0	15.6	12.1
Variety, department and catalogue	0	0.0	1.6	1.6
Florists, nurserymen and seedsmen	0	0.0	2.8	2.2
Toys, hobby, cycle and sports	0	0.0	6.8	5.5
Jewellers	1	4.0	3.6	5.1
Charity and second-hand shops	5	20.0	10.0	9.9
Other comparison goods retailers	3	12.0	8.4	5.6
Total	25	100.0	100.0	100.0

Source: RBBC Land Use Survey July 2023 and Goad Plan UK average.

Table 22 Mix of non-retail service uses – Horley town centre

Type	Number of units	% units	% units Borough average	% units UK average
Restaurant / café	13	24.5	28.1	24.6
Public house / bar	4	7.5	5.2	22.0
Hot food takeaway	7	13.2	12.2	11.4
Bank / other financial service	4	7.5	6.1	11.3
Betting shop / amusement	2	3.8	2.3	6.7
Estate agent / valuer	10	18.9	12.0	6.2
Travel agent	0	0.0	0.7	1.1
Hairdresser / beauty parlour	11	20.8	29.0	15.5
Launderette / dry cleaner	2	3.8	4.5	1.1
Sub-total	53	100.0	100.0	100.0
Other non-retail services	13			
Total	66			

Source: RBBC Land Use Survey July 2023 and Goad Plan UK average.

There is a reasonable selection of national multiple retailers, as set out in Table 23, supported by small independent stores.

Table 23 Multiple retailers – Horley town centre

Comparison		Convenience	Food and Beverage
Age UK	Savers	Iceland	Costa Coffee
Boots	Specsavers	Lidl	Favourite Chicken & Ribs
Boots Opticians Hearingcare	St Catherine's Hospice	Morrisons Daily	Papa John's
Brillen.co.uk	Sussex Beds	Waitrose	Subway
British Heart Foundation	The Salvation Army		

Source: RBBC Land Use Survey July 2023.

Customer Views

As part of the household survey, respondents across the study area were asked if they had used shop, services, or leisure facilities in Horley town centre in the last 12 months. 23.7% of respondents in the study area had visited Horley, which was the lowest figure in the Borough.

Respondents were asked what they liked about the town centre and what improvements would make them visit more often. The main factor liked about Horley was the range of supermarkets (27.4%). However, 18.9% did not identify anything that they liked about the centre. Other main factors mentioned were:

- *factors liked*: close to home (20.0%); good cafés / restaurants (19.4%); good pubs / bars (10.3%); good range of independent shops (7.8%); good range of non-food shops generally (5.7%); and attractive environment / nice place (5.5%).
- *suggested improvements*: more 'high street' retailers (13.3%); more independent shops (12.6%); more / better range of non-food shops generally (11.9%); more / better clothes shops (11.2%); less charity shops (8.1%); less empty shops (5.9%); free car parking (5.4%); update / refurbish the shopping area (5.3%); and more car parking spaces (5.0%).

These household survey results suggest that there are higher levels of dissatisfaction than satisfaction with Horley town centre, with more improvements suggested than factors liked about the centre.

Catchment Area

The household survey results indicate only 23.7% of study area respondents had visited shops, services or leisure facilities at Horley town centre during the last year, which was the lowest of the four town centres in the Borough.

Horley attracts only 3.2% of all comparison goods expenditure within the study area, with most trade coming from the local area i.e. Zone 3 – Horley.

The combined base year turnover of Horley is estimated to be £105 million, the lowest turnover of the four main centres in the Borough. This turnover is split £49 million for convenience retail goods, £29 million for comparison retail goods and £27 million for food/beverage.

Horley has a relatively small, localised catchment area, but has a reasonably mixed trading base. The attraction of food and grocery shopping trips is particularly strong whilst the centre also benefits from its proximity and ease of access to London Gatwick from Horley's train station.

Rental Levels

According to the VOA, Horley has the lowest prime Zone A retail rents of the four centres assessed in the Borough. The prime Zone A retail rent is £275 per sq.m, nearly half of the next lowest average in the Borough (£500 per sq.m in Banstead). These rental levels are rather low but remain reasonable for a centre of Horley's size and indicate that occupier demand is generally keeping up with the supply of available premises. Zone A rents range throughout the centre from £120 to £275 per sq.m, with the most expensive rents along the pedestrianised parade of the High Street. Zone A rents decreased along the High Street, with rents in Victoria Road and Massetts Road ranging from £200 to £262 per sq.m. The cheapest Zone A rents are between £120 and £126 at the north-eastern end of High Street.

Accessibility

Horley Railway Station is situated within the town centre, south of the primary shopping area. The station has four platforms, two of which accommodate 'frequent stopper' trains, and a ticketing office, which is open every day. The station is served by Southern and Thameslink trains, with routes running every half hour towards Three Bridges and Horsham (via Gatwick Airport), as well as Bedford and Peterborough (via London Bridge and London St Pancras).

Horley does not feature a bus/coach station and bus stops in the centre are concentrated at the railway station, which is appropriate for a centre of its size. The buses at Horley serve routes to Redhill, Westvale Park, Langshott, Charlwood, Manor Royal, Copthorne and Pease Pottage.

There are five car parks offering 754 spaces within Horley town centre, including three which are managed by the Council. The two private car parks are attached to Waitrose and the Station. All car parks are easily accessible to the main shopping area, where there is a very limited supply of on-street car parking available. In particular, the Waitrose car park is busy throughout the day, likely as a result of free parking for the first two hours.

At the Council car parks, parking charges are shown in Table 24 below:

Table 24 Car parking charges – Horley town centre

Locations	Monday - Saturday							Sunday & Bank Holiday
	<20 mins	<1 hr	<2 hrs	<3 hrs	<4 hrs	<5 hrs	<10 hrs	flat fee
The High Street	£0.40	£1.20	£1.80	£2.40	£2.90	£3.70	£5.50	£1.00
Central Car Park	£0.40	£1.30	£1.80	£2.40	£2.90	£3.70	£5.50	£1.00
Victoria Road	£0.50	£1.50	£1.90	£2.30	£3.00	£3.60	£5.50	£1.00

Source: RBBC website.

The most liked factors relating to accessibility for respondents of the household survey who had visited Horley in the past year mentioned were that it was: close to home (20.0%), easy to find parking spaces (3.0%), close to friends / relatives (2.3%), easy to get there on foot (1.8%), free car parking (1.3%), good train service (1.2%), cheap car parking (1.2%), good bus service (1.0%), good disabled access (0.9%), close / enroute to work (0.8%) and pedestrianised areas (0.2%).

Survey respondents were also asked what improvements would make them visit Horley town centre more often. The most mentioned improvements relating to accessibility were free parking (5.4%) and the availability of more car parking spaces (5.0%).

Environmental Quality

Horley is a relatively small centre, anchored by two prominent supermarkets: Lidl to the north and Waitrose to the south where the majority of pedestrian activity was observed. The main car parks, which are situated at or near the Waitrose, were also observed to be close to full capacity. The centre also features a public library with an attractive street frontage.

Horley's high street consists of a short pedestrianised parade and a longer stretch of road with vehicular access. Light to medium traffic was observed along the centre's thoroughfares. The roads featured clean and well maintained pavements featuring seating, planters, and waste bins. However these pedestrian routes were narrow and detracted from the wider aesthetics of the centre as a result of inconsistent repairs and mis-matched materials.

The most liked attribute cited by the household survey respondents who had visited Horley in the last twelve months was that it has an attractive environment and/or is a nice place (5.5%). Other main factors liked by the respondents were that it was quiet / not too busy (4.1%), good shop opening hours (3.7%) and nice atmosphere / friendly people (3.4%). In terms of suggested improvements, respondents mostly mentioned fewer empty shops (5.9%) and to update / refurbish the shopping area (5.3%).

The household survey expressed conflicting views about the centre's environmental quality; however, the level of satisfaction (factors liked by respondents) appears to be slightly higher than the level of dissatisfaction (factors where improvements were suggested).

The survey results imply that visitors to Horley appreciated the centre for its calm and low-key nature, but thought the centre was dated.

Occurrence of Crime

CrimeRate.co.uk indicates there were 1,591 crimes reported in Horley in 2022, indicating a crime rate of 62 crimes per 1,000 people. This compares poorly to Surrey's overall crime rate, which is 50 per 1,000 residents. However, as of 2024, Horley's crime rate is a substantial 18% lower than the regional (South East) figure and 25% lower than the national (England, Wales and Northern Ireland) figure. Horley has the second highest rate of crime of the 4 centres assessed in this study.

Of the household survey respondents who had visited Horley in the last year, 2.6% mentioned higher security or better personal safety as a required improvement that would make them visit more often.

Summary and SWOT Analysis

Strengths

- Large provision of convenience goods floorspace, due to the Waitrose and Lidl.
 - Well located and well used car parks.
 - The vacancy rate is below both the Borough and national averages for the number of vacant units and proportion of vacant floorspace.
 - A relative abundance of seating and street furniture throughout the centre.
-

Weaknesses

- Limited range of comparison and convenience stores (in terms of the number or stores, rather than floorspace), and resident concerns about lack of quality retail choices.
- Limited evening economy offer.
- Narrow pavements and poor quality repairs.

Opportunities

- Opportunity to further enhance the attraction of the High Street with enhanced seating design and spaces to meet/gather, as well as greening elements.
- Improvements to cycling routes.
- Opportunity to 'open up' the streets by increasing shopfront transparency of good-quality design.

Threats

- Ongoing attraction of new town centre formats and occupiers to a smaller location with a limited local catchment, without existing brand recognition and draw from the wider area.
 - Retaining anchor stores such as Waitrose and Lidl.
-

Appendix 1 Convenience goods assessment

Table 1 - Study area population projections

Zone	2023	2028	2033	2038	2043
1 - Reigate	27,390	27,972	28,222	28,459	28,702
2 - Redhill	51,486	52,711	53,559	54,372	55,379
3 - Horley	35,618	36,296	36,960	37,659	38,387
4 - Caterham	56,174	57,088	57,944	58,941	59,891
5 - Banstead	63,612	64,398	64,791	65,312	65,810
6 - Tadworth	44,002	44,607	44,938	45,185	45,500
Total	278,282	283,072	286,414	289,928	293,669

Sources: *Experian population projections*

Table 2 - Convenience goods expenditure per person per annum (£)

Zone	2023	2028	2033	2038	2043
1 - Reigate	2,780	2,717	2,705	2,706	2,705
2 - Redhill	2,540	2,482	2,471	2,473	2,472
3 - Horley	2,484	2,428	2,417	2,419	2,418
4 - Caterham	2,513	2,456	2,445	2,447	2,446
5 - Banstead	2,602	2,543	2,532	2,534	2,533
6 - Tadworth	2,816	2,752	2,740	2,741	2,740

Sources:
Experian Local Expenditure 2021 (2021 prices)
Experian growth rates - Retail Planner Briefing Note 21 (February 2024)
Excludes Special Forms of Trading (SFT)

Table 3 - Total convenience goods expenditure (£m)

Zone	2023	2028	2033	2038	2043
1 - Reigate	76.13	75.99	76.33	77.02	77.65
2 - Redhill	130.76	130.84	132.35	134.45	136.88
3 - Horley	88.48	88.13	89.34	91.09	92.81
4 - Caterham	141.16	140.21	141.68	144.22	146.48
5 - Banstead	165.53	163.78	164.04	165.48	166.67
6 - Tadworth	123.89	122.75	123.11	123.87	124.68
Total	725.95	721.71	726.84	736.13	745.18

Source: *Tables 1 and 2*

Table 4 - Base year 2023 convenience goods market shares by zone (%)

Location	1 - Reigate	2 - Redhill	3 - Horley	4 - Caterham	5 - Banstead	6 - Tadworth
Zone 1 Morrisons, Reigate	33.0%	16.7%	2.8%	0.0%	0.8%	2.9%
Zone 1 Other Reigate	21.9%	3.2%	0.7%	0.0%	0.0%	0.9%
Zone 2 Sainsbury's, Redhill	9.5%	35.2%	0.9%	3.5%	0.3%	0.7%
Zone 2 Other Redhill	0.8%	13.4%	2.1%	0.5%	0.2%	0.0%
Zone 3 Lidl, Horley	0.7%	0.9%	20.0%	0.4%	0.0%	0.0%
Zone 3 Waitrose, Horley	2.8%	1.4%	19.9%	0.0%	0.0%	0.0%
Zone 3 Other Horley	0.0%	1.0%	7.9%	0.2%	0.0%	0.0%
Zone 5 Waitrose, Banstead	0.0%	0.0%	0.0%	5.0%	18.3%	6.1%
Zone 4/5 Other Banstead	0.0%	0.1%	0.0%	2.2%	9.8%	0.5%
Zone 6 Asda, Tadworth	2.0%	3.7%	0.0%	2.5%	10.4%	24.3%
Zone 6 Other Tadworth	0.0%	0.0%	0.0%	0.4%	0.0%	7.4%
Reigate & Banstead Total	70.7%	75.5%	54.1%	14.7%	39.8%	42.8%
Crawley	14.9%	14.9%	34.3%	1.4%	1.1%	3.0%
Croydon	1.2%	2.5%	0.5%	38.3%	1.6%	0.0%
Epsom and Ewell	0.0%	0.0%	0.0%	0.2%	15.8%	34.0%
Horsham	0.6%	1.4%	0.0%	0.0%	0.0%	0.0%
Mid Sussex	0.0%	1.4%	0.8%	0.0%	0.0%	0.0%
Mole Vale	10.6%	0.5%	0.0%	0.8%	1.2%	17.2%
Sutton	0.9%	0.0%	0.0%	2.2%	39.4%	1.3%
Tandridge	0.0%	3.3%	6.7%	41.7%	0.3%	0.0%
Elsewhere	1.1%	0.4%	3.7%	0.6%	0.9%	1.7%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: NEMS Household Survey November 2023 and Lichfields' analysis.

Table 5 - Base year 2023 convenience goods expenditure patterns by zone (£m)

Location / Zone	1 - Reigate	2 - Redhill	3 - Horley	4 - Caterham	5 - Banstead	6 - Tadworth	Total
Expenditure 2023	76.13	130.76	88.48	141.16	165.53	123.89	725.95
Zone 1 Morrisons, Reigate	25.09	21.83	2.49	-	1.29	3.62	54.32
Zone 1 Other Reigate	16.64	4.12	0.59	-	-	1.12	22.47
Zone 1 - sub-total	41.73	25.96	3.08	-	1.29	4.73	76.78
Zone 2 Sainsbury's, Redhill	7.24	45.97	0.78	4.94	0.53	0.92	60.38
Zone 2 Other Redhill	0.57	17.49	1.82	0.66	0.36	-	20.90
Zone 2 - sub-total	7.81	63.46	2.60	5.60	0.89	0.92	81.28
Zone 3 Lidl, Horley	0.56	1.20	17.67	0.51	-	-	19.94
Zone 3 Waitrose, Horley	2.16	1.84	17.58	-	-	-	21.58
Zone 3 Other Horley	-	1.37	6.95	0.31	-	-	8.63
Zone 3 - sub-total	2.72	4.41	42.20	0.82	-	-	50.15
Zone 5 Waitrose, Banstead	-	-	-	7.05	30.34	7.56	44.95
Zone 4/5 Other Banstead	-	0.15	-	3.10	16.14	0.62	20.02
Zone 4/5 - sub-total	-	0.15	-	10.15	46.48	8.18	64.96
Zone 6 Asda, Tadworth	1.54	4.78	-	3.57	17.18	30.09	57.15
Zone 6 Other Tadworth	-	-	-	0.60	-	9.12	9.71
Zone 6 - sub-total	1.54	4.78	-	4.17	17.18	39.21	66.86
Reigate & Banstead Total	53.80	98.76	47.87	20.73	65.85	53.04	340.05
Crawley	11.38	19.45	30.31	2.01	1.80	3.68	68.62
Croydon	0.89	3.32	0.41	54.06	2.64	-	61.31
Epsom and Ewell	-	-	-	0.33	26.11	42.09	68.53
Horsham	0.44	1.89	-	-	-	-	2.33
Mid Sussex	-	1.77	0.72	-	-	-	2.48
Mole Vale	8.08	0.69	-	1.17	2.01	21.36	33.31
Sutton	0.68	-	-	3.16	65.17	1.63	70.64
Tandridge	-	4.35	5.90	58.80	0.53	-	69.59
Elsewhere	0.86	0.54	3.27	0.90	1.42	2.09	9.08
TOTAL	76.13	130.76	88.48	141.16	165.53	123.89	725.95

Source: Tables 3 and 4

Table 6 - Future 2028 convenience goods expenditure patterns by zone (£m)

Location / Zone	1 - Reigate	2 - Redhill	3 - Horley	4 - Caterham	5 - Banstead	6 - Tadworth	Total
Expenditure 2028	75.99	130.84	88.13	140.21	163.78	122.75	721.71
Zone 1 Morrisons, Reigate	25.05	21.85	2.48	-	1.28	3.58	54.23
Zone 1 Other Reigate	16.61	4.13	0.59	-	-	1.11	22.43
Zone 1 - sub-total	41.65	25.97	3.06	-	1.28	4.69	76.65
Zone 2 Sainsbury's, Redhill	7.22	46.00	0.78	4.90	0.53	0.91	60.35
Zone 2 Other Redhill	0.57	17.51	1.81	0.65	0.36	-	20.90
Zone 2 - sub-total	7.79	63.51	2.59	5.56	0.88	0.91	81.24
Zone 3 Lidl, Horley	0.56	1.20	17.60	0.51	-	-	19.87
Zone 3 Waitrose, Horley	2.16	1.84	17.51	-	-	-	21.51
Zone 3 Other Horley	-	1.37	6.92	0.31	-	-	8.60
Zone 3 - sub-total	2.72	4.41	42.03	0.82	-	-	49.98
Zone 5 Waitrose, Banstead	-	-	-	7.00	30.02	7.49	44.51
Zone 4/5 Other Banstead	-	0.15	-	3.08	15.97	0.61	19.82
Zone 4/5 - sub-total	-	0.15	-	10.08	45.99	8.11	64.33
Zone 6 Asda, Tadworth	1.54	4.78	-	3.54	17.00	29.81	56.67
Zone 6 Other Tadworth	-	-	-	0.59	-	9.03	9.63
Zone 6 - sub-total	1.54	4.78	-	4.14	17.00	38.85	66.30
Reigate & Banstead Total	53.70	98.82	47.68	20.59	65.15	52.55	338.50
Crawley	11.36	19.46	30.19	1.99	1.78	3.64	68.43
Croydon	0.89	3.32	0.41	53.69	2.61	-	60.92
Epsom and Ewell	-	-	-	0.33	25.84	41.70	67.87
Horsham	0.44	1.89	-	-	-	-	2.33
Mid Sussex	-	1.77	0.71	-	-	-	2.48
Mole Vale	8.07	0.69	-	1.16	1.99	21.16	33.07
Sutton	0.67	-	-	3.14	64.48	1.62	69.91
Tandridge	-	4.35	5.88	58.41	0.53	-	69.16
Elsewhere	0.86	0.54	3.25	0.90	1.40	2.07	9.03
TOTAL	75.99	130.84	88.13	140.21	163.78	122.75	721.71

Source: Tables 3 and 4

Table 7 - Future 2033 convenience goods expenditure patterns by zone (£m)

Location / Zone	1 - Reigate	2 - Redhill	3 - Horley	4 - Caterham	5 - Banstead	6 - Tadworth	Total
Expenditure 2033	76.33	132.35	89.34	141.68	164.04	123.11	726.84
Zone 1 Morrisons, Reigate	25.16	22.10	2.51	-	1.28	3.59	54.64
Zone 1 Other Reigate	16.68	4.17	0.60	-	-	1.11	22.56
Zone 1 - sub-total	41.84	26.27	3.11	-	1.28	4.70	77.20
Zone 2 Sainsbury's, Redhill	7.25	46.53	0.79	4.96	0.53	0.92	60.97
Zone 2 Other Redhill	0.57	17.71	1.84	0.66	0.36	-	21.14
Zone 2 - sub-total	7.83	64.24	2.62	5.62	0.89	0.92	82.11
Zone 3 Lidl, Horley	0.56	1.22	17.84	0.51	-	-	20.13
Zone 3 Waitrose, Horley	2.17	1.86	17.75	-	-	-	21.78
Zone 3 Other Horley	-	1.38	7.02	0.32	-	-	8.71
Zone 3 - sub-total	2.73	4.46	42.61	0.83	-	-	50.62
Zone 5 Waitrose, Banstead	-	-	-	7.07	30.07	7.51	44.65
Zone 4/5 Other Banstead	-	0.16	-	3.11	16.00	0.62	19.88
Zone 4/5 - sub-total	-	0.16	-	10.18	46.07	8.13	64.53
Zone 6 Asda, Tadworth	1.54	4.83	-	3.58	17.02	29.90	56.88
Zone 6 Other Tadworth	-	-	-	0.60	-	9.06	9.66
Zone 6 - sub-total	1.54	4.83	-	4.18	17.02	38.96	66.54
Reigate & Banstead Total	53.94	99.96	48.34	20.81	65.25	52.71	341.00
Crawley	11.41	19.69	30.60	2.02	1.78	3.65	69.15
Croydon	0.89	3.36	0.41	54.26	2.62	-	61.53
Epsom and Ewell	-	-	-	0.33	25.88	41.82	68.03
Horsham	0.45	1.91	-	-	-	-	2.35
Mid Sussex	-	1.79	0.72	-	-	-	2.51
Mole Vale	8.10	0.70	-	1.17	1.99	21.22	33.19
Sutton	0.68	-	-	3.17	64.58	1.62	70.06
Tandridge	-	4.40	5.96	59.02	0.53	-	69.91
Elsewhere	0.87	0.55	3.30	0.91	1.40	2.08	9.10
TOTAL	76.33	132.35	89.34	141.68	164.04	123.11	726.84

Source: Tables 3 and 4

Table 8 - Future 2038 convenience goods expenditure patterns by zone (£m)

Location / Zone	1 - Reigate	2 - Redhill	3 - Horley	4 - Caterham	5 - Banstead	6 - Tadworth	Total
Expenditure 2038	77.02	134.45	91.09	144.22	165.48	123.87	736.13
Zone 1 Morrisons, Reigate	25.38	22.45	2.56	-	1.29	3.62	55.30
Zone 1 Other Reigate	16.83	4.24	0.61	-	-	1.12	22.80
Zone 1 - sub-total	42.22	26.69	3.17	-	1.29	4.73	78.09
Zone 2 Sainsbury's, Redhill	7.32	47.27	0.80	5.04	0.53	0.92	61.89
Zone 2 Other Redhill	0.58	17.99	1.87	0.67	0.36	-	21.47
Zone 2 - sub-total	7.90	65.26	2.68	5.72	0.89	0.92	83.37
Zone 3 Lidl, Horley	0.56	1.24	18.19	0.52	-	-	20.52
Zone 3 Waitrose, Horley	2.19	1.89	18.10	-	-	-	22.18
Zone 3 Other Horley	-	1.40	7.15	0.32	-	-	8.88
Zone 3 - sub-total	2.75	4.53	43.44	0.84	-	-	51.57
Zone 5 Waitrose, Banstead	-	-	-	7.20	30.33	7.56	45.09
Zone 4/5 Other Banstead	-	0.16	-	3.16	16.14	0.62	20.08
Zone 4/5 - sub-total	-	0.16	-	10.37	46.47	8.18	65.17
Zone 6 Asda, Tadworth	1.56	4.91	-	3.65	17.17	30.09	57.37
Zone 6 Other Tadworth	-	-	-	0.61	-	9.11	9.72
Zone 6 - sub-total	1.56	4.91	-	4.26	17.17	39.20	67.10
Reigate & Banstead Total	54.43	101.55	49.29	21.18	65.83	53.03	345.30
Crawley	11.51	20.00	31.20	2.05	1.80	3.68	70.24
Croydon	0.90	3.41	0.42	55.23	2.64	-	62.60
Epsom and Ewell	-	-	-	0.34	26.11	42.08	68.53
Horsham	0.45	1.94	-	-	-	-	2.39
Mid Sussex	-	1.82	0.74	-	-	-	2.56
Mole Vale	8.18	0.71	-	1.19	2.01	21.35	33.45
Sutton	0.68	-	-	3.23	65.15	1.63	70.69
Tandridge	-	4.47	6.08	60.07	0.53	-	71.15
Elsewhere	0.87	0.55	3.36	0.92	1.42	2.09	9.23
TOTAL	77.02	134.45	91.09	144.22	165.48	123.87	736.13

Source: Tables 3 and 4

Table 9 - Future 2043 convenience goods expenditure patterns by zone (£m)

Location / Zone	1 - Reigate	2 - Redhill	3 - Horley	4 - Caterham	5 - Banstead	6 - Tadworth	Total
Expenditure 2043	77.65	136.88	92.81	146.48	166.67	124.68	745.18
Zone 1 Morrisons, Reigate	25.59	22.86	2.61	-	1.30	3.64	55.99
Zone 1 Other Reigate	16.97	4.32	0.62	-	-	1.12	23.03
Zone 1 - sub-total	42.56	27.17	3.23	-	1.30	4.76	79.02
Zone 2 Sainsbury's, Redhill	7.38	48.12	0.82	5.12	0.54	0.93	62.91
Zone 2 Other Redhill	0.58	18.31	1.91	0.68	0.36	-	21.85
Zone 2 - sub-total	7.96	66.44	2.73	5.81	0.90	0.93	84.76
Zone 3 Lidl, Horley	0.57	1.26	18.54	0.53	-	-	20.90
Zone 3 Waitrose, Horley	2.21	1.92	18.44	-	-	-	22.57
Zone 3 Other Horley	-	1.43	7.29	0.33	-	-	9.04
Zone 3 - sub-total	2.78	4.61	44.26	0.85	-	-	52.51
Zone 5 Waitrose, Banstead	-	-	-	7.31	30.55	7.61	45.47
Zone 4/5 Other Banstead	-	0.16	-	3.21	16.26	0.62	20.26
Zone 4/5 - sub-total	-	0.16	-	10.53	46.80	8.23	65.73
Zone 6 Asda, Tadworth	1.57	5.00	-	3.70	17.30	30.28	57.85
Zone 6 Other Tadworth	-	-	-	0.62	-	9.17	9.79
Zone 6 - sub-total	1.57	5.00	-	4.32	17.30	39.46	67.65
Reigate & Banstead Total	54.87	103.39	50.22	21.51	66.30	53.38	349.67
Crawley	11.61	20.36	31.79	2.08	1.81	3.70	71.36
Croydon	0.91	3.47	0.43	56.09	2.66	-	63.56
Epsom and Ewell	-	-	-	0.34	26.29	42.36	68.99
Horsham	0.45	1.97	-	-	-	-	2.43
Mid Sussex	-	1.85	0.75	-	-	-	2.60
Mole Vale	8.24	0.72	-	1.21	2.03	21.49	33.70
Sutton	0.69	-	-	3.28	65.62	1.64	71.23
Tandridge	-	4.55	6.19	61.02	0.54	-	72.30
Elsewhere	0.88	0.56	3.43	0.94	1.43	2.11	9.34
TOTAL	77.65	136.88	92.81	146.48	166.67	124.68	745.18

Source: Tables 3 and 4

Table 10 - Convenience goods sales floorspace and benchmark turnover

Zone / Store	Sales floorspace (sq m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq m net)	Turnover (£ per sq m)	Total turnover (£m)
Marks & Spencer Simply Food, High Street, Reigate	664	95%	631	£10,888	£6.87
Morrisons, Bell Street, Reigate	2,713	85%	2,306	£12,150	£28.02
Other Reigate town centre	500	100%	500	£7,000	£3.50
Co-op, Trehaven Parade, Reigate	238	95%	226	£11,301	£2.56
Co-op, Allingham Road, Reigate	209	95%	199	£11,301	£2.24
Co-op, Western Parade, Reigate	126	95%	120	£11,301	£1.35
Co-op, London Road, Reigate	157	95%	149	£11,301	£1.69
Other Local centres Zone 1	400	100%	400	£8,000	£3.20
Zone 1 - Reigate sub-total	5,007		4,530		£49.42
Iceland, Queensway, Redhill	392	95%	372	£6,665	£2.48
Marks & Spencer Foodhall, The Belfry, Redhill	697	95%	662	£10,888	£7.21
Sainsbury's, London Road, Redhill	3,207	85%	2,726	£14,411	£39.28
Tesco Express, Marketfield Way, Redhill	347	95%	330	£11,301	£3.73
Other Redhill town centre	1,400	100%	1,400	£7,000	£9.80
Co-op, Portland Drive, Redhill	194	95%	184	£11,301	£2.08
Marks & Spencer Simply Food, Brighton Road, Redhill	84	95%	80	£10,888	£0.87
Marks & Spencer Simply Food, East Surrey Hospital, Redhill	626	95%	595	£10,888	£6.48
Tesco Express, Canalside, Redhill	329	95%	313	£13,477	£4.21
Other local centres Zone 2	700	100%	700	£8,000	£5.60
Zone 2 - Redhill sub-total	7,976		7,362		£81.74
Iceland, Victoria Road, Horley	342	95%	325	£6,665	£2.17
Lidl, Victoria Road, Horley	1,013	80%	810	£8,730	£7.07
Waitrose, Victoria Road, Horley	1,541	90%	1,387	£13,706	£19.01
Morrisons Daily, Victoria Road, Horley	307	95%	292	£12,150	£3.54
Other Horley town centre	300	100%	300	£8,000	£2.40
Co-op, Brighton Road, Horley	200	95%	190	£11,301	£2.15
Little Waitrose, Brighton Road, Horley	84	95%	80	£13,706	£1.09
Tesco Express, Brighton Road, Horley	202	95%	192	£13,477	£2.59
Sainsbury's Local, Bonehurst Road, Horley	116	95%	110	£14,411	£1.59
Other local centres Zone 3	500	100%	500	£8,000	£4.00
Zone 3 - Horley sub-total	4,605		4,186		£45.61
Marks & Spencer Simply Food, High Street, Banstead	328	95%	312	£10,888	£3.39
Tesco Express, High Street, Banstead	177	95%	168	£13,477	£2.27
Waitrose, High Street, Banstead	1,715	90%	1,544	£13,706	£21.16
Other Banstead town centre	500	100%	500	£8,000	£4.00
Co-op, Nork Way, Banstead	270	95%	257	£11,301	£2.90
Marks & Spencer Simply Food, Brighton Road, Banstead	84	95%	80	£10,888	£0.87
Tesco Express, Drift Bridge	175	95%	166	£13,477	£2.24
Other local centre Zone 4/5	800	100%	800	£8,000	£6.40
Zone 4/5 - Banstead/Chipstead sub-total	4,049		3,026		£43.22
Asda, Reigate Road, Tadworth	4,778	70%	3,345	£13,718	£45.88
Co-op, Walton Road, Tadworth	371	95%	352	£11,301	£3.98
Little Waitrose, Brighton Road, Tadworth	399	95%	379	£13,706	£5.20
Co-op, Tattenham Crescent	214	95%	203	£11,301	£2.30
Marks & Spencer Simply Food, Brighton Road, Lower Kingwood	84	95%	80	£10,888	£0.87
Other local centres Zone 6	1,200	100%	1,200	£8,000	£9.60
Zone 6 - Tadworth sub-total	7,046		5,559		£67.83
Total	28,683		24,663		£287.82

Source: RBBC land use survey 2023, ORC Storepoint 2023 and GlobalData company average sales densities 2022

Table 11 - Summary of convenience goods expenditure 2023 to 2043 (£m)

	2023	2028	2033	2038	2043
Available expenditure					
1 - Reigate	76.78	76.65	77.20	78.09	79.02
2 - Redhill	81.28	81.24	82.11	83.37	84.76
3 - Horley	50.15	49.98	50.62	51.57	52.51
4/5 - Banstead/Chipstead	64.96	64.33	64.53	65.17	65.73
6 - Tadworth	66.86	66.30	66.54	67.10	67.65
Total	340.05	338.50	341.00	345.30	349.67
Turnover of existing facilities					
1 - Reigate	56.84	57.12	57.52	57.81	58.10
2 - Redhill	81.74	82.15	82.73	83.14	83.56
3 - Horley	45.61	45.84	46.16	46.39	46.62
4/5 - Banstead/Chipstead	49.71	49.95	50.30	50.56	50.81
6 - Tadworth	67.83	68.17	68.64	68.99	69.33
Total	301.72	303.23	305.36	306.88	308.42
Surplus/deficit expenditure					
1 - Reigate	19.95	19.53	19.67	20.28	20.92
2 - Redhill	-0.46	-0.90	-0.62	0.23	1.21
3 - Horley	4.54	4.14	4.47	5.18	5.89
4/5 - Banstead/Chipstead	15.26	14.38	14.23	14.62	14.92
6 - Tadworth	-0.96	-1.87	-2.10	-1.89	-1.69
Total	38.33	35.27	35.65	38.41	41.24

Source: Tables 5 to 9 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Figure 4a

Table 12 - Convenience goods floorspace capacity up to 2043 (cumulative)

	2023	2028	2033	2038	2043
Turnover density new floorspace (£ per sq m)	£12,250	£12,311	£12,398	£12,460	£12,522
Floorspace projection (sq m net)					
1 - Reigate	1,630	1,590	1,590	1,630	1,670
2 - Redhill	-40	-70	-50	20	100
3 - Horley	370	340	360	420	470
4/5 - Banstead/Chipstead	1,250	1,170	1,150	1,170	1,190
6 - Tadworth	-80	-150	-170	-150	-130
Total	3,130	2,880	2,880	3,090	3,300
Floorspace projection (sq m gross)					
1 - Reigate	2,330	2,270	2,270	2,330	2,390
2 - Redhill	-60	-100	-70	30	140
3 - Horley	530	490	510	600	670
4/5 - Banstead/Chipstead	1,790	1,670	1,640	1,670	1,700
6 - Tadworth	-110	-210	-240	-210	-190
Total	4,480	4,120	4,110	4,420	4,710

Source: Table 11 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Figure 4a

Figures may not sum due to rounding

Combined company average sales density for 8 main food store operators (Aldi, Asda, Lidl, M&S, Morrisons, Sainsbury's, Tesco and Waitrose)

Appendix 2 Comparison goods assessment

Table 1 - Study area population projections

Zone	2023	2028	2033	2038	2043
1 - Reigate	27,390	27,972	28,222	28,459	28,702
2 - Redhill	51,486	52,711	53,559	54,372	55,379
3 - Horley	35,618	36,296	36,960	37,659	38,387
4 - Caterham	56,174	57,088	57,944	58,941	59,891
5 - Banstead	63,612	64,398	64,791	65,312	65,810
6 - Tadworth	44,002	44,607	44,938	45,185	45,500
Total	278,282	283,072	286,414	289,928	293,669

Sources: Experian population projections

Table 2 - Comparison goods expenditure per person per annum (£)

Zone	2023	2028	2033	2038	2043
1 - Reigate	3,453	3,631	4,101	4,642	5,291
2 - Redhill	3,102	3,262	3,684	4,170	4,754
3 - Horley	3,154	3,316	3,745	4,240	4,833
4 - Caterham	3,067	3,225	3,643	4,123	4,700
5 - Banstead	3,140	3,302	3,730	4,222	4,812
6 - Tadworth	3,553	3,736	4,220	4,777	5,445

Sources:

Experian Local Expenditure 2021 (2021 prices)

Experian growth rates - Retail Planner Briefing Note 21 (February 2024)

Excludes Special Forms of Trading (SFT)

Table 3 - Total comparison goods expenditure (£m)

Zone	2023	2028	2033	2038	2043
1 - Reigate	94.57	101.56	115.73	132.10	151.87
2 - Redhill	159.71	171.93	197.31	226.74	263.25
3 - Horley	112.33	120.36	138.43	159.66	185.52
4 - Caterham	172.29	184.11	211.07	243.04	281.50
5 - Banstead	199.76	212.65	241.64	275.73	316.71
6 - Tadworth	156.35	166.67	189.64	215.85	247.77
Total	895.02	957.27	1,093.82	1,253.13	1,446.62

Source: Tables 1 and 2

Table 4 - Base year 2023 comparison goods market shares by zone (%)

Location	1 - Reigate	2 - Redhill	3 - Horley	4 - Caterham	5 - Banstead	6 - Tadworth
Zone 1 Reigate	36.0%	11.9%	4.1%	4.8%	1.6%	8.3%
Zone 1 Other	2.1%	0.5%	0.0%	0.2%	0.0%	0.4%
Zone 2 Redhill	16.8%	35.0%	6.3%	10.6%	1.0%	2.2%
Zone 2 Other	0.4%	1.4%	0.4%	0.1%	0.0%	0.0%
Zone 3 Horley	4.5%	2.7%	17.7%	0.0%	0.0%	0.2%
Zone 3 Other	0.0%	0.5%	2.4%	0.0%	0.4%	0.7%
Zone 5 Banstead	0.0%	0.5%	0.3%	3.1%	9.1%	2.1%
Zone 4/5 Other	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
Zone 6 Tadworth	0.0%	0.0%	0.0%	0.0%	0.1%	0.6%
Zone 6 Other	0.1%	0.9%	0.0%	1.3%	4.4%	8.0%
Reigate & Banstead Total	60.0%	53.5%	31.3%	20.1%	16.7%	22.7%
Bluewater	3.4%	4.8%	1.8%	5.5%	2.3%	1.5%
Central London	1.9%	1.8%	0.7%	1.8%	2.1%	1.3%
Crawley	14.7%	25.6%	52.6%	6.8%	0.6%	6.3%
Croydon	4.1%	2.8%	1.9%	20.6%	8.3%	5.3%
Purley Way, Croydon	1.5%	1.9%	0.0%	15.7%	9.8%	3.7%
Epsom and Ewell	1.5%	0.6%	0.0%	0.9%	12.6%	27.9%
Guildford	1.4%	0.5%	0.3%	0.2%	0.0%	2.0%
Horsham	0.7%	1.6%	2.6%	0.5%	0.1%	1.0%
Kingston upon Thames	0.7%	0.3%	2.3%	1.5%	9.6%	5.8%
Mid Sussex	0.0%	0.0%	0.8%	0.0%	0.0%	0.4%
Mole Vale	3.2%	0.1%	0.2%	0.1%	0.5%	12.1%
New Malden	0.0%	0.1%	0.0%	0.0%	1.6%	1.1%
Sutton	0.2%	0.1%	1.6%	6.5%	29.0%	5.0%
Tandridge	0.2%	0.8%	0.1%	16.1%	0.4%	0.0%
Elsewhere	6.6%	5.7%	3.8%	3.8%	6.4%	4.0%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: NEMS Household Survey November 2023 and Lichfields' analysis.

Table 5 - Base year 2023 comparison goods expenditure patterns by zone (£m)

Location / Zone	1 - Reigate	2 - Redhill	3 - Horley	4 - Caterham	5 - Banstead	6 - Tadworth	Total
Expenditure 2023	94.57	159.71	112.33	172.29	199.76	156.35	895.02
Zone 1 Reigate	34.01	19.08	4.63	8.19	3.17	13.04	82.12
Zone 1 Other	2.03	0.76	-	0.40	-	0.63	3.82
Zone 1 - sub-total	36.04	19.84	4.63	8.60	3.17	13.67	85.95
Zone 2 Redhill	15.90	55.82	7.12	18.19	2.10	3.49	102.62
Zone 2 Other	0.40	2.29	0.48	0.22	0.07	-	3.46
Zone 2 - sub-total	16.30	58.11	7.60	18.41	2.16	3.49	106.08
Zone 3 Horley	4.29	4.30	19.90	-	-	0.33	28.82
Zone 3 Other	-	0.79	2.70	-	0.82	1.11	5.42
Zone 3 - sub-total	4.29	5.09	22.60	-	0.82	1.44	34.24
Zone 5 Banstead	-	0.85	0.33	5.33	18.08	3.33	27.93
Zone 4/5 Other	-	-	-	0.06	0.14	-	0.20
Zone 5 - sub-total	-	0.85	0.33	5.40	18.22	3.33	28.14
Zone 6 Tadworth	-	-	-	-	0.28	0.93	1.21
Zone 6 Other	0.10	1.52	-	2.28	8.75	12.58	25.22
Zone 6 - sub-total	0.10	1.52	-	2.28	9.03	13.51	26.43
Reigate & Banstead Total	56.73	85.40	35.16	34.68	33.41	35.45	280.83
Bluewater	3.18	7.61	1.99	9.51	4.59	2.29	29.18
Central London	1.81	2.80	0.80	3.17	4.27	2.03	14.88
Crawley	13.89	40.87	59.13	11.64	1.23	9.80	136.57
Croydon	3.84	4.49	2.12	35.55	16.60	8.21	70.81
Purley Way, Croydon	1.38	2.98	-	26.97	19.57	5.73	56.64
Epsom and Ewell	1.42	0.89	-	1.54	25.15	43.69	72.70
Guildford	1.35	0.86	0.33	0.29	-	3.15	5.98
Horsham	0.68	2.48	2.90	0.90	0.14	1.62	8.72
Kingston upon Thames	0.66	0.42	2.59	2.52	19.14	9.13	34.47
Mid Sussex	-	-	0.95	-	-	0.55	1.51
Mole Vale	3.00	0.23	0.18	0.14	0.90	18.89	23.33
New Malden	-	0.16	-	-	3.12	1.74	5.01
Sutton	0.16	0.16	1.83	11.19	58.01	7.78	79.13
Tandridge	0.21	1.23	0.09	27.66	0.85	-	30.05
Elsewhere	6.24	9.15	4.23	6.52	12.78	6.31	45.23
TOTAL	94.57	159.71	112.33	172.29	199.76	156.35	895.02

Source: Tables 3 and 4

Table 6 - Future 2028 comparison goods expenditure patterns by zone (£m)

Location / Zone	1 - Reigate	2 - Redhill	3 - Horley	4 - Caterham	5 - Banstead	6 - Tadworth	Total
Expenditure 2028	101.56	171.93	120.36	184.11	212.65	166.67	957.27
Zone 1 Reigate	36.53	20.53	4.96	8.75	3.37	13.90	88.05
Zone 1 Other	2.18	0.82	-	0.43	-	0.67	4.10
Zone 1 - sub-total	38.71	21.35	4.96	9.19	3.37	14.57	92.15
Zone 2 Redhill	17.07	60.09	7.63	19.44	2.23	3.72	110.18
Zone 2 Other	0.43	2.46	0.52	0.23	0.07	-	3.72
Zone 2 - sub-total	17.51	62.55	8.15	19.67	2.30	3.72	113.90
Zone 3 Horley	4.61	4.63	21.32	-	-	0.35	30.92
Zone 3 Other	-	0.85	2.89	-	0.88	1.18	5.79
Zone 3 - sub-total	4.61	5.48	24.21	-	0.88	1.54	36.71
Zone 5 Banstead	-	0.91	0.36	5.70	19.25	3.55	29.77
Zone 4/5 Other	-	-	-	0.07	0.15	-	0.22
Zone 5 - sub-total	-	0.91	0.36	5.77	19.40	3.55	29.99
Zone 6 Tadworth	-	-	-	-	0.30	0.99	1.29
Zone 6 Other	0.10	1.63	-	2.44	9.31	13.41	26.89
Zone 6 - sub-total	0.10	1.63	-	2.44	9.61	14.40	28.18
Reigate & Banstead Total	60.92	91.93	37.68	37.06	35.56	37.78	300.94
Bluewater	3.42	8.20	2.14	10.16	4.89	2.44	31.24
Central London	1.94	3.01	0.86	3.39	4.54	2.16	15.91
Crawley	14.92	44.00	63.36	12.44	1.31	10.44	146.47
Croydon	4.13	4.83	2.28	37.99	17.67	8.75	75.64
Purley Way, Croydon	1.49	3.21	-	28.82	20.83	6.11	60.46
Epsom and Ewell	1.53	0.96	-	1.65	26.78	46.57	77.48
Guildford	1.45	0.92	0.36	0.31	-	3.36	6.40
Horsham	0.73	2.67	3.11	0.97	0.15	1.73	9.34
Kingston upon Thames	0.71	0.45	2.78	2.70	20.38	9.73	36.75
Mid Sussex	-	-	1.02	-	-	0.59	1.61
Mole Vale	3.22	0.25	0.19	0.15	0.96	20.13	24.90
New Malden	-	0.17	-	-	3.32	1.85	5.34
Sutton	0.17	0.17	1.96	11.95	61.75	8.29	84.30
Tandridge	0.23	1.32	0.10	29.56	0.90	-	32.12
Elsewhere	6.70	9.85	4.54	6.97	13.60	6.72	48.39
TOTAL	101.56	171.93	120.36	184.11	212.65	166.67	957.27

Source: Tables 3 and 4

Table 7 - Future 2033 comparison goods expenditure patterns by zone (£m)

Location / Zone	1 - Reigate	2 - Redhill	3 - Horley	4 - Caterham	5 - Banstead	6 - Tadworth	Total
Expenditure 2033	115.73	197.31	138.43	211.07	241.64	189.64	1,093.82
Zone 1 Reigate	41.62	23.57	5.71	10.04	3.83	15.82	100.59
Zone 1 Other	2.48	0.94	-	0.49	-	0.76	4.68
Zone 1 - sub-total	44.11	24.51	5.71	10.53	3.83	16.58	105.27
Zone 2 Redhill	19.46	68.96	8.77	22.29	2.53	4.23	126.25
Zone 2 Other	0.50	2.83	0.59	0.27	0.08	-	4.27
Zone 2 - sub-total	19.95	71.79	9.37	22.55	2.62	4.23	130.51
Zone 3 Horley	5.25	5.31	24.52	-	-	0.40	35.49
Zone 3 Other	-	0.97	3.32	-	0.99	1.35	6.64
Zone 3 - sub-total	5.25	6.29	27.85	-	0.99	1.75	42.13
Zone 5 Banstead	-	1.05	0.41	6.54	21.87	4.04	33.91
Zone 4/5 Other	-	-	-	0.08	0.17	-	0.25
Zone 5 - sub-total	-	1.05	0.41	6.61	22.04	4.04	34.16
Zone 6 Tadworth	-	-	-	-	0.34	1.13	1.46
Zone 6 Other	0.12	1.87	-	2.79	10.58	15.26	30.62
Zone 6 - sub-total	0.12	1.87	-	2.79	10.92	16.38	32.09
Reigate & Banstead Total	69.43	105.50	43.33	42.49	40.41	42.99	344.15
Bluewater	3.90	9.41	2.46	11.65	5.55	2.78	35.74
Central London	2.21	3.46	0.98	3.89	5.16	2.46	18.16
Crawley	17.00	50.49	72.87	14.26	1.49	11.88	168.00
Croydon	4.70	5.54	2.62	43.55	20.08	9.96	86.45
Purley Way, Croydon	1.69	3.68	-	33.04	23.68	6.95	69.04
Epsom and Ewell	1.74	1.10	-	1.89	30.43	52.99	88.15
Guildford	1.66	1.06	0.41	0.36	-	3.83	7.30
Horsham	0.83	3.06	3.58	1.11	0.17	1.96	10.70
Kingston upon Thames	0.81	0.51	3.20	3.09	23.16	11.07	41.84
Mid Sussex	-	-	1.17	-	-	0.67	1.84
Mole Vale	3.67	0.28	0.22	0.17	1.09	22.91	28.34
New Malden	-	0.19	-	-	3.77	2.11	6.07
Sutton	0.19	0.19	2.26	13.70	70.17	9.44	95.96
Tandridge	0.26	1.52	0.12	33.89	1.02	-	36.81
Elsewhere	7.64	11.31	5.22	7.99	15.46	7.65	55.26
TOTAL	115.73	197.31	138.43	211.07	241.64	189.64	1,093.82

Source: Tables 3 and 4

Table 8 - Future 2038 comparison goods expenditure patterns by zone (£m)

Location / Zone	1 - Reigate	2 - Redhill	3 - Horley	4 - Caterham	5 - Banstead	6 - Tadworth	Total
Expenditure 2038	132.10	226.74	159.66	243.04	275.73	215.85	1,253.13
Zone 1 Reigate	47.51	27.08	6.58	11.56	4.37	18.01	115.11
Zone 1 Other	2.84	1.08	-	0.57	-	0.87	5.35
Zone 1 - sub-total	50.35	28.16	6.58	12.12	4.37	18.88	120.47
Zone 2 Redhill	22.21	79.25	10.12	25.66	2.89	4.82	144.95
Zone 2 Other	0.57	3.25	0.69	0.31	0.09	-	4.90
Zone 2 - sub-total	22.77	82.50	10.81	25.97	2.99	4.82	149.85
Zone 3 Horley	5.99	6.11	28.29	-	-	0.46	40.85
Zone 3 Other	-	1.12	3.83	-	1.14	1.53	7.62
Zone 3 - sub-total	5.99	7.22	32.12	-	1.14	1.99	48.46
Zone 5 Banstead	-	1.21	0.47	7.53	24.96	4.60	38.77
Zone 4/5 Other	-	-	-	0.09	0.19	-	0.28
Zone 5 - sub-total	-	1.21	0.47	7.62	25.15	4.60	39.05
Zone 6 Tadworth	-	-	-	-	0.39	1.28	1.67
Zone 6 Other	0.13	2.15	-	3.22	12.08	17.37	34.94
Zone 6 - sub-total	0.13	2.15	-	3.22	12.46	18.65	36.61
Reigate & Banstead Total	79.25	121.24	49.98	48.92	46.11	48.93	394.44
Bluewater	4.45	10.81	2.83	13.41	6.34	3.16	41.00
Central London	2.53	3.97	1.14	4.48	5.89	2.80	20.80
Crawley	19.41	58.02	84.05	16.42	1.70	13.52	193.13
Croydon	5.37	6.37	3.02	50.14	22.91	11.33	99.14
Purley Way, Croydon	1.93	4.23	-	38.04	27.02	7.91	79.14
Epsom and Ewell	1.99	1.26	-	2.17	34.72	60.31	100.46
Guildford	1.89	1.21	0.47	0.41	-	4.35	8.34
Horsham	0.94	3.52	4.12	1.27	0.19	2.24	12.29
Kingston upon Thames	0.93	0.59	3.69	3.56	26.42	12.60	47.79
Mid Sussex	-	-	1.36	-	-	0.76	2.12
Mole Vale	4.18	0.32	0.25	0.20	1.25	26.07	32.28
New Malden	-	0.22	-	-	4.30	2.40	6.92
Sutton	0.22	0.22	2.60	15.78	80.07	10.74	109.64
Tandridge	0.30	1.75	0.13	39.02	1.17	-	42.37
Elsewhere	8.72	12.99	6.02	9.20	17.64	8.71	63.27
TOTAL	132.10	226.74	159.66	243.04	275.73	215.85	1,253.13

Source: Tables 3 and 4

Table 9 - Future 2043 comparison goods expenditure patterns by zone (£m)

Location / Zone	1 - Reigate	2 - Redhill	3 - Horley	4 - Caterham	5 - Banstead	6 - Tadworth	Total
Expenditure 2043	151.87	263.25	185.52	281.50	316.71	247.77	1,446.62
Zone 1 Reigate	54.62	31.44	7.65	13.39	5.02	20.67	132.79
Zone 1 Other	3.26	1.25	-	0.66	-	1.00	6.17
Zone 1 - sub-total	57.88	32.70	7.65	14.04	5.02	21.67	138.96
Zone 2 Redhill	25.53	92.01	11.76	29.72	3.32	5.53	167.88
Zone 2 Other	0.65	3.77	0.80	0.36	0.11	-	5.68
Zone 2 - sub-total	26.18	95.78	12.56	30.08	3.43	5.53	173.56
Zone 3 Horley	6.89	7.09	32.87	-	-	0.53	47.37
Zone 3 Other	-	1.30	4.45	-	1.30	1.76	8.81
Zone 3 - sub-total	6.89	8.39	37.32	-	1.30	2.29	56.19
Zone 5 Banstead	-	1.40	0.55	8.72	28.67	5.28	44.62
Zone 4/5 Other	-	-	-	0.11	0.22	-	0.32
Zone 5 - sub-total	-	1.40	0.55	8.82	28.89	5.28	44.94
Zone 6 Tadworth	-	-	-	-	0.44	1.47	1.91
Zone 6 Other	0.15	2.50	-	3.72	13.87	19.93	40.18
Zone 6 - sub-total	0.15	2.50	-	3.72	14.31	21.40	42.10
Reigate & Banstead Total	91.11	140.76	58.07	56.67	52.96	56.17	455.74
Bluewater	5.11	12.55	3.29	15.54	7.28	3.63	47.40
Central London	2.90	4.61	1.32	5.19	6.77	3.22	24.00
Crawley	22.31	67.36	97.66	19.02	1.96	15.52	223.84
Croydon	6.17	7.40	3.51	58.08	26.32	13.01	114.48
Purley Way, Croydon	2.22	4.91	-	44.06	31.03	9.08	91.31
Epsom and Ewell	2.29	1.47	-	2.52	39.88	69.23	115.38
Guildford	2.17	1.41	0.55	0.47	-	5.00	9.60
Horsham	1.08	4.09	4.79	1.48	0.22	2.57	14.22
Kingston upon Thames	1.07	0.69	4.28	4.12	30.35	14.47	54.98
Mid Sussex	-	-	1.57	-	-	0.87	2.45
Mole Vale	4.81	0.38	0.29	0.23	1.43	29.93	37.07
New Malden	-	0.26	-	-	4.94	2.75	7.95
Sutton	0.25	0.26	3.03	18.28	91.97	12.33	126.12
Tandridge	0.34	2.03	0.15	45.20	1.34	-	49.06
Elsewhere	10.02	15.09	6.99	10.65	20.26	9.99	73.01
TOTAL	151.87	263.25	185.52	281.50	316.71	247.77	1,446.62

Source: Tables 3 and 4

Table 10 - Comparison goods retail outlets and floorspace within the Borough

Zone / centre	Number of comparison outlets	Floorspace (sq m gross)	Sales floorspace (sq m net)
Reigate town centre	77	11,497	8,048
Comparison goods sales in food stores	n/a	n/a	477
Homebase, London Road, Reigate	1	3,724	3,348
Zone 1 - local centres	22	1,804	1,263
Zone 1 - Reigate sub-total	100	17,025	13,136
Redhill town centre	52	23,406	16,384
Comparison goods sales in food stores	n/a	n/a	615
Retail warehouses, Brighton Raod, Redhill	3	3,285	2,792
Zone 2 - local centres	17	2,498	1,749
Zone 2 - Redhill sub-total	72	29,189	21,540
Horley town centre	25	6,860	4,802
Comparison goods sales in food stores	n/a	n/a	428
Zone 3 - local centres	9	888	622
Zone 3 - Horley sub-total	34	7,748	5,852
Banstead town centre	38	4,414	3,090
Comparison goods sales in food stores	n/a	n/a	623
Zone 4/5 - local centres	10	722	505
Zone 4/5 - Banstead sub-total	48	5,136	4,218
Zone 6 - local centres	26	3,276	2,293
Comparison goods sales in food stores	n/a	n/a	15
Zone 6 - Tadworth sub-total	26	3,276	2,308
Total	280	57,238	47,054

Source: RBBC land use survey 2023 and VOA

Table 11 - Summary of comparison goods expenditure 2023 to 2043 (£m)

	2023	2028	2033	2038	2043
Available expenditure					
1 - Reigate	85.95	92.15	105.27	120.47	138.96
2 - Redhill	106.08	113.90	130.51	149.85	173.56
3 - Horley	34.24	36.71	42.13	48.46	56.19
4/5 - Banstead	28.14	29.99	34.16	39.05	44.94
6 - Tadworth	26.43	28.18	32.09	36.61	42.10
Total	280.83	300.94	344.15	394.44	455.74
Turnover of existing facilities					
1 - Reigate	85.95	91.77	104.34	118.63	134.87
2 - Redhill	106.08	113.26	128.77	146.41	166.46
3 - Horley	34.24	36.56	41.57	47.26	53.73
4/5 - Banstead	28.14	30.04	34.16	38.83	44.15
6 - Tadworth	26.43	28.22	32.08	36.47	41.47
Total	280.83	299.85	340.91	387.60	440.67
Surplus/deficit expenditure					
1 - Reigate	-	0.38	0.93	1.84	4.09
2 - Redhill	-	0.64	1.74	3.44	7.10
3 - Horley	-	0.15	0.56	1.20	2.46
4/5 - Banstead	-	-0.05	0.00	0.21	0.79
6 - Tadworth	-	-0.04	0.01	0.14	0.63
Total	-	1.09	3.24	6.84	15.07

Source: Tables 5 to 10 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Figure 4a

Table 12 - Comparison goods floorspace capacity up to 2043 (cumulative)

	2023	2028	2033	2038	2043
Turnover density new floorspace (£ per sq.m)	£7,000	£7,474	£8,498	£9,661	£10,984
Floorspace projection (sq m net)					
1 - Reigate	-	50	110	190	370
2 - Redhill	-	90	200	360	650
3 - Horley	-	20	70	120	220
4/5 - Banstead	-	-10	-	20	70
6 - Tadworth	-	-10	-	10	60
Total	-	140	380	700	1,370
Floorspace projection (sq m gross)					
1 - Reigate	-	70	160	270	530
2 - Redhill	-	130	290	510	930
3 - Horley	-	30	100	170	310
4/5 - Banstead	-	-10	-	30	100
6 - Tadworth	-	-10	-	10	90
Total	-	210	550	990	1,960

Source: Table 11 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Figure 4a
 Figures may not sum due to rounding

Appendix 3 Food/beverage assessment

Table 1 - Study area population projections

Zone	2023	2028	2033	2038	2043
1 - Reigate	27,390	27,972	28,222	28,459	28,702
2 - Redhill	51,486	52,711	53,559	54,372	55,379
3 - Horley	35,618	36,296	36,960	37,659	38,387
4 - Caterham	56,174	57,088	57,944	58,941	59,891
5 - Banstead	63,612	64,398	64,791	65,312	65,810
6 - Tadworth	44,002	44,607	44,938	45,185	45,500
Total	278,282	283,072	286,414	289,928	293,669

Sources: Experian population projections

Table 2 - Food and beverage expenditure per person per annum (£)

Zone	2023	2028	2033	2038	2043
1 - Reigate	2,179	2,259	2,364	2,460	2,560
2 - Redhill	1,990	2,062	2,159	2,247	2,338
3 - Horley	1,770	1,835	1,921	1,999	2,080
4 - Caterham	1,864	1,932	2,022	2,105	2,190
5 - Banstead	2,081	2,157	2,258	2,349	2,445
6 - Tadworth	2,131	2,209	2,312	2,406	2,504

Sources:

Experian Local Expenditure 2021 (2021 prices)

Experian growth rates - Retail Planner Briefing Note 21 (February 2024)

Table 3 - Total food and beverage expenditure (£m)

Zone	2023	2028	2033	2038	2043
1 - Reigate	59.69	63.18	66.73	70.02	73.49
2 - Redhill	102.45	108.71	115.64	122.16	129.48
3 - Horley	63.06	66.60	70.99	75.28	79.85
4 - Caterham	104.70	110.28	117.18	124.04	131.17
5 - Banstead	132.36	138.88	146.28	153.44	160.90
6 - Tadworth	93.78	98.53	103.91	108.73	113.94
Total	556.04	586.19	620.73	653.68	688.83

Source: Tables 1 and 2

Table 4 - Base year 2023 food and beverage market shares by zone (%)

Location	1 - Reigate	2 - Redhill	3 - Horley	4 - Caterham	5 - Banstead	6 - Tadworth
Zone 1 Reigate	55.4%	35.7%	9.5%	8.2%	4.4%	10.1%
Zone 1 Other	6.4%	1.9%	1.1%	0.6%	0.3%	0.2%
Zone 2 Redhill	0.3%	14.5%	2.7%	4.5%	0.4%	0.0%
Zone 2 Other	4.7%	11.7%	5.9%	5.5%	0.0%	2.1%
Zone 3 Horley	1.9%	2.4%	36.2%	0.0%	0.0%	0.2%
Zone 3 Other	1.4%	1.7%	13.1%	0.0%	0.0%	0.6%
Zone 5 Banstead	0.0%	0.0%	0.9%	6.1%	33.7%	6.1%
Zone 4/5 Other	0.0%	0.4%	0.0%	8.7%	2.3%	0.0%
Zone 6 Tadworth	0.0%	0.0%	0.9%	0.8%	1.5%	9.9%
Zone 6 Other	0.0%	0.5%	0.0%	2.2%	6.0%	18.8%
Reigate & Banstead Total	70.1%	68.8%	70.2%	36.5%	48.6%	47.9%
Central London	8.1%	9.0%	0.9%	9.4%	11.1%	9.3%
Crawley	0.0%	3.3%	12.8%	2.4%	0.0%	0.0%
Croydon	0.0%	1.5%	0.0%	21.1%	1.2%	1.5%
Epsom and Ewell	0.0%	0.0%	0.0%	2.9%	5.8%	17.3%
Horsham	0.0%	0.0%	5.8%	0.0%	0.0%	0.9%
Kingston upon Thames	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%
Mid Sussex	0.8%	1.7%	1.3%	0.0%	0.0%	0.0%
Mole Vale	8.7%	4.0%	0.9%	1.4%	1.5%	13.9%
Sutton	1.9%	0.0%	0.0%	0.8%	17.5%	0.6%
Tandridge	0.0%	4.2%	0.5%	18.9%	0.6%	2.5%
Elsewhere	10.5%	7.4%	7.6%	6.7%	12.1%	6.2%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: NEMS Household Survey November 2023 and Lichfields' analysis.

Table 5 - Base year 2023 food and beverage expenditure patterns by zone (£m)

Location / Zone	1 - Reigate	2 - Redhill	3 - Horley	4 - Caterham	5 - Banstead	6 - Tadworth	Total
Expenditure 2023	59.69	102.45	63.06	104.70	132.36	93.78	556.04
Zone 1 Reigate	33.06	36.62	6.00	8.54	5.84	9.49	99.53
Zone 1 Other	3.83	1.92	0.68	0.66	0.36	0.18	7.64
Zone 1 - sub-total	36.89	38.54	6.68	9.20	6.20	9.67	107.17
Zone 2 Redhill	0.19	14.88	1.69	4.67	0.58	-	22.01
Zone 2 Other	2.81	12.03	3.70	5.80	-	1.92	26.26
Zone 2 - sub-total	3.01	26.90	5.39	10.47	0.58	1.92	48.27
Zone 3 Horley	1.13	2.43	22.82	-	-	0.18	26.57
Zone 3 Other	0.83	1.77	8.26	-	-	0.55	11.42
Zone 3 - sub-total	1.97	4.20	31.08	-	-	0.73	37.98
Zone 5 Banstead	-	-	0.56	6.37	44.64	5.70	57.26
Zone 4/5 Other	-	0.38	-	9.14	3.09	-	12.61
Zone 5 - sub-total	-	0.38	0.56	15.52	47.72	5.70	69.87
Zone 6 Tadworth	-	-	0.56	0.80	1.94	9.29	12.58
Zone 6 Other	-	0.51	-	2.27	7.92	17.65	28.36
Zone 6 - sub-total	-	0.51	0.56	3.07	9.86	26.94	40.93
Reigate & Banstead Total	41.86	70.54	44.27	38.24	64.36	44.96	304.23
Central London	4.81	9.19	0.56	9.81	14.73	8.71	47.81
Crawley	-	3.42	8.05	2.51	-	-	13.99
Croydon	-	1.54	-	22.06	1.58	1.36	26.55
Epsom and Ewell	-	-	-	3.00	7.73	16.20	26.93
Horsham	-	-	3.64	-	-	0.89	4.53
Kingston upon Thames	-	-	-	-	2.06	-	2.06
Mid Sussex	0.47	1.79	0.82	-	-	-	3.07
Mole Vale	5.18	4.13	0.56	1.48	1.99	13.00	26.33
Sutton	1.12	-	-	0.80	23.12	0.55	25.58
Tandridge	-	4.28	0.35	19.74	0.79	2.32	27.48
Elsewhere	6.25	7.57	4.81	7.06	15.99	5.79	47.47
TOTAL	59.69	102.45	63.06	104.70	132.36	93.78	556.04

Source: Tables 3 and 4

Table 6 - Future 2028 food and beverage expenditure patterns by zone (£m)

Location / Zone	1 - Reigate	2 - Redhill	3 - Horley	4 - Caterham	5 - Banstead	6 - Tadworth	Total
Expenditure 2028	63.18	108.71	66.60	110.28	138.88	98.53	586.19
Zone 1 Reigate	34.99	38.85	6.33	8.99	6.13	9.97	105.27
Zone 1 Other	4.06	2.04	0.72	0.69	0.38	0.19	8.08
Zone 1 - sub-total	39.05	40.89	7.05	9.69	6.50	10.16	113.34
Zone 2 Redhill	0.20	15.79	1.79	4.92	0.61	-	23.30
Zone 2 Other	2.98	12.76	3.90	6.11	-	2.02	27.77
Zone 2 - sub-total	3.18	28.55	5.69	11.02	0.61	2.02	51.07
Zone 3 Horley	1.20	2.58	24.10	-	-	0.19	28.07
Zone 3 Other	0.88	1.88	8.73	-	-	0.58	12.06
Zone 3 - sub-total	2.08	4.46	32.83	-	-	0.77	40.14
Zone 5 Banstead	-	-	0.59	6.71	46.83	5.98	60.12
Zone 4/5 Other	-	0.40	-	9.63	3.24	-	13.27
Zone 5 - sub-total	-	0.40	0.59	16.34	50.07	5.98	73.40
Zone 6 Tadworth	-	-	0.59	0.84	2.03	9.76	13.22
Zone 6 Other	-	0.54	-	2.39	8.31	18.55	29.79
Zone 6 - sub-total	-	0.54	0.59	3.23	10.34	28.31	43.01
Reigate & Banstead Total	44.31	74.85	46.76	40.28	67.53	47.24	320.96
Central London	5.09	9.75	0.59	10.34	15.45	9.15	50.38
Crawley	-	3.63	8.51	2.65	-	-	14.78
Croydon	-	1.64	-	23.24	1.66	1.43	27.97
Epsom and Ewell	-	-	-	3.16	8.11	17.02	28.29
Horsham	-	-	3.84	-	-	0.94	4.78
Kingston upon Thames	-	-	-	-	2.16	-	2.16
Mid Sussex	0.50	1.90	0.86	-	-	-	3.26
Mole Vale	5.48	4.38	0.59	1.55	2.09	13.66	27.75
Sutton	1.18	-	-	0.84	24.26	0.58	26.86
Tandridge	-	4.54	0.37	20.79	0.83	2.44	28.97
Elsewhere	6.61	8.04	5.08	7.44	16.78	6.08	50.02
TOTAL	63.18	108.71	66.60	110.28	138.88	98.53	586.19

Source: Tables 3 and 4

Table 7 - Future 2033 food and beverage expenditure patterns by zone (£m)

Location / Zone	1 - Reigate	2 - Redhill	3 - Horley	4 - Caterham	5 - Banstead	6 - Tadworth	Total
Expenditure 2033	66.73	115.64	70.99	117.18	146.28	103.91	620.73
Zone 1 Reigate	36.95	41.33	6.75	9.55	6.45	10.51	111.56
Zone 1 Other	4.29	2.17	0.77	0.74	0.40	0.20	8.56
Zone 1 - sub-total	41.24	43.50	7.52	10.29	6.85	10.71	120.11
Zone 2 Redhill	0.21	16.79	1.91	5.22	0.64	-	24.77
Zone 2 Other	3.15	13.58	4.16	6.49	-	2.13	29.50
Zone 2 - sub-total	3.36	30.37	6.07	11.71	0.64	2.13	54.28
Zone 3 Horley	1.27	2.75	25.69	-	-	0.20	29.91
Zone 3 Other	0.93	1.99	9.30	-	-	0.61	12.84
Zone 3 - sub-total	2.20	4.74	35.00	-	-	0.81	42.75
Zone 5 Banstead	-	-	0.63	7.13	49.33	6.31	63.40
Zone 4/5 Other	-	0.43	-	10.23	3.41	-	14.07
Zone 5 - sub-total	-	0.43	0.63	17.36	52.74	6.31	77.47
Zone 6 Tadworth	-	-	0.63	0.89	2.14	10.29	13.95
Zone 6 Other	-	0.58	-	2.54	8.75	19.56	31.43
Zone 6 - sub-total	-	0.58	0.63	3.43	10.89	29.85	45.38
Reigate & Banstead Total	46.80	79.61	49.84	42.80	71.12	49.82	340.00
Central London	5.38	10.38	0.63	10.98	16.28	9.65	53.29
Crawley	-	3.86	9.07	2.81	-	-	15.74
Croydon	-	1.74	-	24.69	1.75	1.51	29.69
Epsom and Ewell	-	-	-	3.36	8.54	17.95	29.85
Horsham	-	-	4.10	-	-	0.99	5.08
Kingston upon Thames	-	-	-	-	2.28	-	2.28
Mid Sussex	0.53	2.02	0.92	-	-	-	3.46
Mole Vale	5.79	4.66	0.63	1.65	2.20	14.41	29.33
Sutton	1.25	-	-	0.89	25.55	0.61	28.30
Tandridge	-	4.83	0.39	22.09	0.88	2.57	30.76
Elsewhere	6.98	8.55	5.41	7.90	17.68	6.41	52.93
TOTAL	66.73	115.64	70.99	117.18	146.28	103.91	620.73

Source: Tables 3 and 4

Table 8 - Future 2038 food and beverage expenditure patterns by zone (£m)

Location / Zone	1 - Reigate	2 - Redhill	3 - Horley	4 - Caterham	5 - Banstead	6 - Tadworth	Total
Expenditure 2038	70.02	122.16	75.28	124.04	153.44	108.73	653.68
Zone 1 Reigate	38.78	43.66	7.16	10.11	6.77	11.00	117.49
Zone 1 Other	4.50	2.29	0.82	0.78	0.42	0.21	9.01
Zone 1 - sub-total	43.28	45.95	7.97	10.89	7.19	11.21	126.49
Zone 2 Redhill	0.23	17.74	2.02	5.53	0.67	-	26.18
Zone 2 Other	3.30	14.34	4.41	6.87	-	2.23	31.16
Zone 2 - sub-total	3.53	32.08	6.43	12.40	0.67	2.23	57.34
Zone 3 Horley	1.33	2.90	27.24	-	-	0.21	31.68
Zone 3 Other	0.98	2.11	9.86	-	-	0.64	13.59
Zone 3 - sub-total	2.31	5.01	37.11	-	-	0.85	45.27
Zone 5 Banstead	-	-	0.67	7.55	51.75	6.60	66.57
Zone 4/5 Other	-	0.45	-	10.83	3.58	-	14.86
Zone 5 - sub-total	-	0.45	0.67	18.38	55.32	6.60	81.43
Zone 6 Tadworth	-	-	0.67	0.94	2.24	10.77	14.62
Zone 6 Other	-	0.61	-	2.69	9.18	20.47	32.95
Zone 6 - sub-total	-	0.61	0.67	3.63	11.43	31.24	47.57
Reigate & Banstead Total	49.11	84.11	52.85	45.30	74.61	52.13	358.11
Central London	5.65	10.96	0.67	11.63	17.07	10.10	56.07
Crawley	-	4.08	9.62	2.98	-	-	16.67
Croydon	-	1.84	-	26.14	1.84	1.58	31.39
Epsom and Ewell	-	-	-	3.56	8.96	18.78	31.30
Horsham	-	-	4.35	-	-	1.03	5.38
Kingston upon Thames	-	-	-	-	2.39	-	2.39
Mid Sussex	0.55	2.13	0.97	-	-	-	3.66
Mole Vale	6.07	4.92	0.67	1.75	2.31	15.08	30.79
Sutton	1.31	-	-	0.94	26.80	0.64	29.70
Tandridge	-	5.10	0.41	23.39	0.92	2.69	32.51
Elsewhere	7.33	9.03	5.74	8.36	18.54	6.71	55.71
TOTAL	70.02	122.16	75.28	124.04	153.44	108.73	653.68

Source: Tables 3 and 4

Table 9 - Future 2043 food and beverage expenditure patterns by zone (£m)

Location / Zone	1 - Reigate	2 - Redhill	3 - Horley	4 - Caterham	5 - Banstead	6 - Tadworth	Total
Expenditure 2043	73.49	129.48	79.85	131.17	160.90	113.94	688.83
Zone 1 Reigate	40.70	46.28	7.59	10.69	7.10	11.53	123.89
Zone 1 Other	4.72	2.43	0.86	0.82	0.44	0.22	9.49
Zone 1 - sub-total	45.42	48.71	8.46	11.52	7.54	11.75	133.39
Zone 2 Redhill	0.24	18.80	2.14	5.85	0.71	-	27.73
Zone 2 Other	3.46	15.20	4.68	7.26	-	2.34	32.95
Zone 2 - sub-total	3.70	34.00	6.82	13.11	0.71	2.34	60.68
Zone 3 Horley	1.40	3.07	28.90	-	-	0.22	33.59
Zone 3 Other	1.03	2.23	10.46	-	-	0.67	14.39
Zone 3 - sub-total	2.42	5.31	39.36	-	-	0.89	47.98
Zone 5 Banstead	-	-	0.71	7.98	54.26	6.92	69.87
Zone 4/5 Other	-	0.48	-	11.45	3.75	-	15.69
Zone 5 - sub-total	-	0.48	0.71	19.44	58.01	6.92	85.56
Zone 6 Tadworth	-	-	0.71	1.00	2.35	11.29	15.34
Zone 6 Other	-	0.65	-	2.84	9.63	21.45	34.57
Zone 6 - sub-total	-	0.65	0.71	3.84	11.98	32.73	49.91
Reigate & Banstead Total	51.54	89.15	56.06	47.91	78.24	54.63	377.52
Central London	5.93	11.62	0.71	12.29	17.90	10.58	59.03
Crawley	-	4.32	10.20	3.15	-	-	17.67
Croydon	-	1.95	-	27.64	1.93	1.65	33.16
Epsom and Ewell	-	-	-	3.76	9.40	19.68	32.84
Horsham	-	-	4.61	-	-	1.08	5.69
Kingston upon Thames	-	-	-	-	2.51	-	2.51
Mid Sussex	0.58	2.26	1.03	-	-	-	3.87
Mole Vale	6.37	5.21	0.71	1.85	2.42	15.80	32.37
Sutton	1.38	-	-	1.00	28.10	0.67	31.15
Tandridge	-	5.41	0.44	24.73	0.96	2.82	34.36
Elsewhere	7.69	9.57	6.09	8.84	19.44	7.03	58.67
TOTAL	73.49	129.48	79.85	131.17	160.90	113.94	688.83

Source: Tables 3 and 4

Table 10 - Food and beverage outlets within designated centres in the Borough

Zone / centre	Number of outlets	Floorspace (sq.m gross)
Reigate town centre	41	6,172
Zone 1 - local centres	13	968
Zone 1 - Reigate sub-total	54	7,140
Redhill town centre	20	5,987
Zone 2 - local centres	29	2,825
Zone 2 - Redhill sub-total	49	8,812
Horley town centre	24	3,895
Zone 3 - local centres	12	1,185
Zone 3 - Horley sub-total	36	5,080
Banstead town centre	22	3,182
Zone 4/5 - local centres	13	1,306
Zone 5 - Banstead sub-total	35	4,488
Zone 6 - local centres	27	2,708
Zone 6 - Tadworth sub-total	27	2,708
Total	201	28,228

Source: RBBC 2023 land use survey

Table 11 - Summary of food and beverage expenditure 2023 to 2043 (£m)

	2023	2028	2033	2038	2043
Available expenditure					
1 - Reigate	107.17	113.34	120.11	126.49	133.39
2 - Redhill	48.27	51.07	54.28	57.34	60.68
3 - Horley	37.98	40.14	42.75	45.27	47.98
4/5 - Banstead	69.87	73.40	77.47	81.43	85.56
6 - Tadworth	40.93	43.01	45.38	47.57	49.91
Total	304.23	320.96	340.00	358.11	377.52
Turnover of existing facilities					
1 - Reigate	107.17	107.92	109.65	110.75	111.87
2 - Redhill	48.27	48.60	49.39	49.88	50.38
3 - Horley	37.98	38.25	38.86	39.25	39.65
4/5 - Banstead	69.87	70.36	71.49	72.21	72.94
6 - Tadworth	40.93	41.22	41.88	42.30	42.73
Total	304.23	306.35	311.28	314.40	317.56
Surplus/deficit expenditure					
1 - Reigate	-	5.43	10.46	15.74	21.52
2 - Redhill	-	2.47	4.89	7.46	10.30
3 - Horley	-	1.89	3.88	6.02	8.34
4/5 - Banstead	-	3.04	5.98	9.22	12.62
6 - Tadworth	-	1.79	3.50	5.27	7.18
Total	-	14.62	28.72	43.71	59.96

Source: Tables 5 to 10 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Figure 2

Table 12 - Food and beverage floorspace capacity up to 2043 (cumulative)

	2023	2028	2033	2038	2043
Turnover density new floorspace (£ per sq m)	£6,000	£6,042	£6,139	£6,201	£6,263
Floorspace projection (sq m gross)					
1 - Reigate	-	900	1,700	2,540	3,440
2 - Redhill	-	410	800	1,200	1,640
3 - Horley	-	310	630	970	1,330
4/5 - Banstead	-	500	970	1,490	2,020
6 - Tadworth	-	300	570	850	1,150
Total	-	2,420	4,680	7,050	9,570

Source: Table 11 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Leisure - Figure 2

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