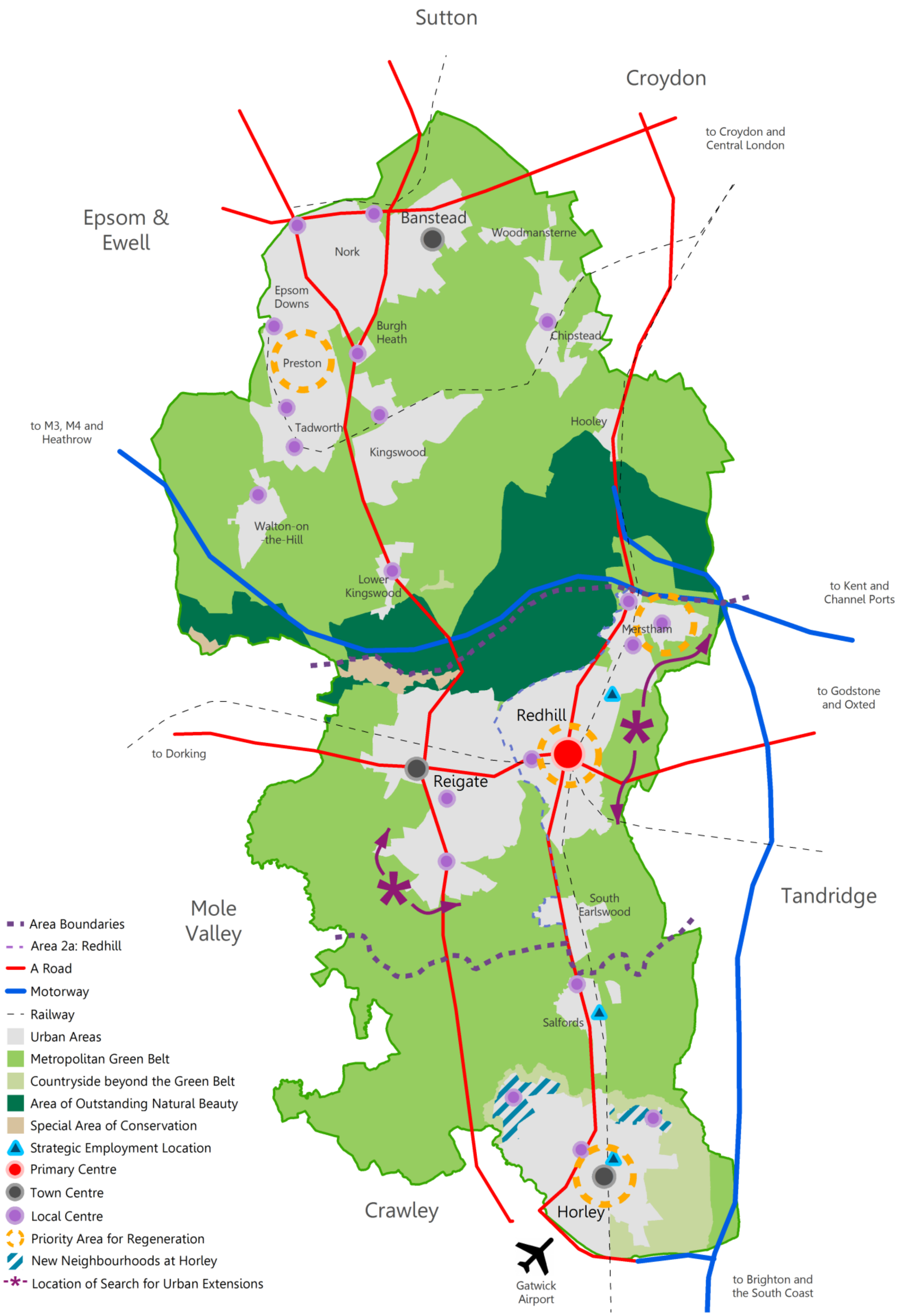
Housing Delivery Monitor

Including Five Year Land Supply Position at 31 March 2013

Published June 2013

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


Sutton
Croydon
to Croydon and Central London
Epsom & Ewell
Banstead
Woodmansterne
Nork
Epsom Downs
Burgh Heath
Chipstead
Preston
to M3, M4 and Heathrow
Tadworth
Kingswood
Hooley
Walton-on-the-Hill
Lower Kingswood
to Kent and Channel Ports
Merstham
to Godstone and Oxted
Redhill
to Dorking
Reigate
Mole Valley
Tandridge
South Earlswood
Salfords
Crawley
Horley
Gatwick Airport
to Brighton and the South Coast
Area Boundaries
Area 2a: Redhill
A Road
Motorway
Railway
Urban Areas
Metropolitan Green Belt
Countryside beyond the Green Belt
Area of Outstanding Natural Beauty
Special Area of Conservation
Strategic Employment Location
Primary Centre
Town Centre
Local Centre
Priority Area for Regeneration
New Neighbourhoods at Horley
Location of Search for Urban Extensions

Housing Delivery Monitor

Position at End March 2013

Contents

Please Note:

The information contained within this monitor details housing completions and outstanding permissions within Reigate & Banstead during the period 1 April 2012 to 31 March 2013. The housing trajectory and five year land supply is compiled using monitoring data at 31 March 2013 and information from the 2013 Strategic Housing Land Availability Assessment.

While every care has been taken to ensure that the information in this monitor is accurate, the Borough Council accepts no responsibility for any errors or omissions. We would be grateful if our attention was drawn to any inaccuracies so that they might be corrected. Similarly, any suggestions that would make the information more useful would be gratefully received.

Introduction

This monitor provides information on the general housing market and the current amount, type and location of housing commitments and completions in the borough. Its purpose is to:

- Provide data and analysis on the national and local housing market;
- Monitor and analyse the characteristics of housing supply including density, location and type of housing and car parking provision against the relevant policies; and
- Provide the base data for the evaluation of Local Plan and Core Strategy policies
- Set out the borough's housing trajectory and 5 year deliverable land supply position.

Future Policy Developments

The Borough Local Plan 2005, including its saved policies, is in the process of being replaced by new local planning documents. The Council submitted its Core Strategy in May 2012. Following feedback from the Planning Inspector, the Council carried out some additional work which resulted in amendments to the document. The revised documents were submitted to the Inspector in March 2013 and examination hearing sessions took place in May 2013. The Inspector has provided a note to the Council setting out the main modifications required to ensure soundness of the document (over and above those recommended by the Council), to enable the Council to consult over the summer. Representations received will be passed to the Inspector who will consider them in the preparation of his final report. This is likely to be received by October 2013 with the document anticipated for adoption in December 2013.

The Core Strategy sets the overarching strategic approach for delivering new homes in the borough. Detailed policies and housing allocations will be set out in the emerging Development Management Policies DPD.

Relevant Emerging Core Strategy Policies and Indicators

Policy	Monitoring Indicator
CS8	% of new residential dwellings built on previously developed land. Target – at least 50%.
CS11	At least 6,900 additional dwellings between 2012 and 2027.
CS12	Type and size of unit completed compared to SHMA recommendations. Appropriate mix of dwellings in line with housing need, site size & characteristic..
CS13	A minimum of 1,500 gross new units of affordable housing between 2012 and 2027. 30% of affordable housing secured on permissions for developments of 15+ net additional units. Financial contribution equivalent to % of affordable housing for developments of 1-9 and 10-14 units.
CS15	% of residential dwellings built within 15 minutes of a public transport stop. Target – at least 80%.

The guidance and policies are available under Planning Policies on the Council's web site:

www.reigate-banstead.gov.uk/planning

Geographical Information

The monitor relates to the Borough's four main settlement areas:

- **Area 1 - Banstead**
- **Area 2a - Redhill** – including Merstham and Earlswood & Whitebushes
- **Area 2b - Reigate** – including South Park, Woodhatch and Meadvale
- **Area 3 - Horley** – including Salfords & Sidlow

Key Messages

UK Trends

For the first time since the financial crisis first hit the UK back in 2008, the UK economy is finally showing signs of recovery. Recent figures released by ONS showed the economy grew by 0.3% in the first 3 months of 2013, thus avoiding a triple dip recession. Once again UK inflation has remained stable, at 2.8% in March 2013, the same rate as last year and still slightly above the Government target. Conversely, mortgage lending saw the biggest drop in the last month for more than 15 years, with mortgage repayments significantly outweighing mortgage lending by nearly £1bn.

Over the past year up to April 2013, the average house price in England and Wales dropped by less than 1%, and currently stands at nearly £240,500 (Q3 2012) compared to £241,400 recorded in the previous year. Based on recent changes on the market, house prices are set to improve partly down to the recently proposed government mortgage lending scheme such as, help to buy. There has been an upturn in the housing market, with house prices increasing back to similar levels seen at the height of the 2007 property boom. This is due to increasing demand particularly from new buyers coupled with a shortage of homes available on the market.

Once again transaction volumes across England and Wales continued to fall to just over 621,400 from 632,500. These figures remain significantly down on peak figures of around 1.25 million in 2007. Market evidence found sales are finally on the up. The total number of properties sold in England and Wales at the end of March 2013 were at their highest level for 3 years, showing signs of recovery in the housing market.

Borough Key Messages

- **House Prices:** The average house price in Q3 2012 was almost 3% lower than the previous years figure at over £360,000. Part of this drop is likely to be down to the type of units which have come onto the market, as a result of recent developments in the borough. All dwelling types across the borough (detached, semi detached, terraces and flats) saw an increase in average prices.
- **Affordability:** Affordability ratio softened slightly from 8.59 to 7.65 as a result of this overall house price drop. However, the borough still remains one of the most affordable in Surrey.
- **Sales:** Annual sales increased slightly over the past year to 2,061. These figures remain significantly below the peak transaction levels of more than 3,500 seen prior to the recession.
- **Housing Delivery:** The borough plans to deliver at least 6,900 new homes over the planned period of 2012-2027, equivalent to an annual average of 460 additional homes per year. This figure takes into account the 10,000 requirement for new dwellings, previously contained in the now revoked South East Plan. At least 5,800 homes will come from within the existing urban area, the remainder from sustainable broad locations, set out in policy CS4.
- **Completions:** The number of net completions for 2011-12 was 469, slightly above the previous year’s figure.
- **Previously Developed Land (PDL):** Around 80% of completions were on previously developed land (PDL) a slight increase compared to the previous year, due to a higher contribution from the North East Sector. When the North East Sector is excluded, the figure rises to 83%.
- **New Permissions:** A gross total of 547 residential units were permitted during the past year, significantly above the previous year. The net yield of new permissions is 445 dwellings.

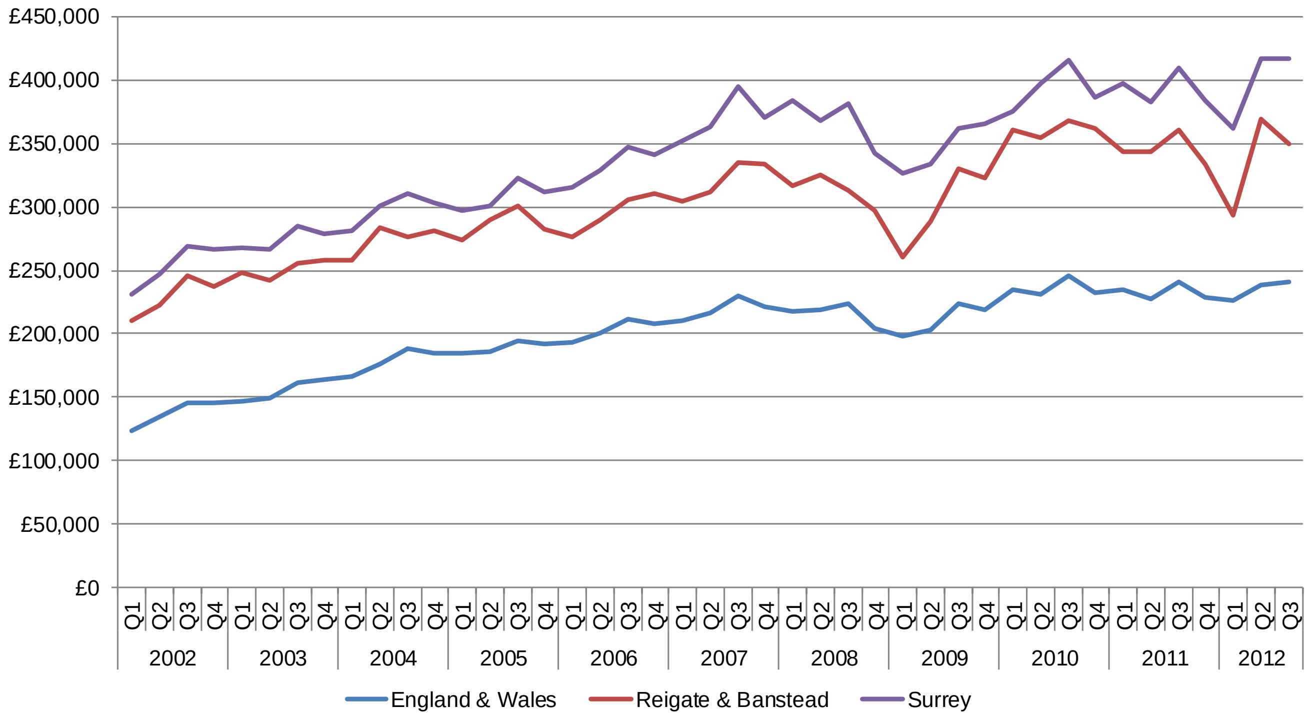
Housing Market

Average House Prices

According to Land Registry/Department for Communities and Local Government data, average house prices in the borough fell from over £360,000 in Q3 2011 to just under £350,000 in Q3 2012. For the second consecutive year house prices in the borough remain below the Surrey average of just over £417,000 in Q3 2012 which has been the case for the past decade. These figures are considerably above both the regional and national averages.

However, it is important to note that local house price inflation data can be particularly sensitive to housing developments, for example, the completion and sale of a large flat development may skew analysis.

Figure 1 Average House Price Q1 2002 – Q3 2012



House Price Inflation

According to Land Registry/DCLG data, house prices across England and Wales fell by just under 1% over the past year. House price inflation in Reigate & Banstead has stayed negative, with prices falling by almost 3%, compared to the previous year. During this time the inflation rate has fluctuated considerably before, falling back down to a similar rate recorded in 2011. For the first time since the end of 2010, house price inflation across Surrey was positive at 1.8%. House price inflation data is no longer produced for the South East, as the South East Plan has since been revoked.

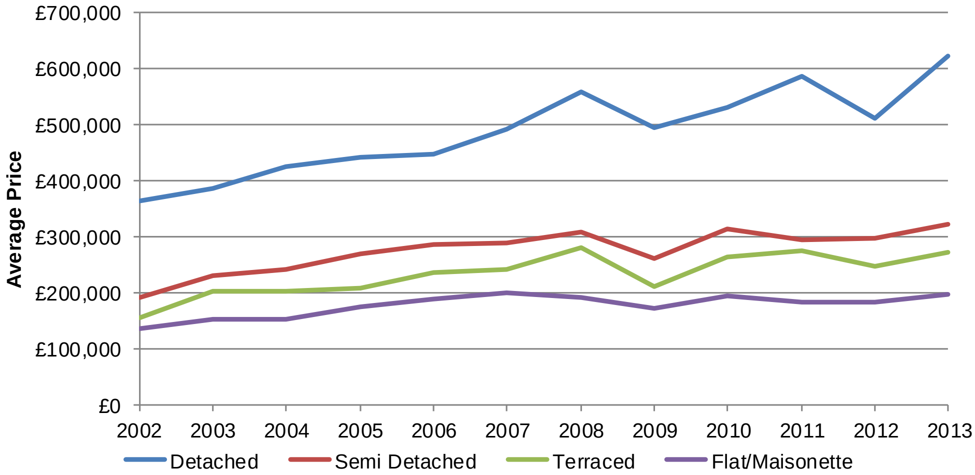
However, as above it is important to note that local analysis of house price movements is particularly sensitive to local housing development.

Price Breakdown by Dwelling Type

As can be seen in figure 2 below, the average price for all housing types has increased over the past year.

In the last 12 months Reigate & Banstead saw the biggest increase in average house prices for a detached dwelling, falling just short of £624,500 compared to £512,500 recorded in the previous year. Meanwhile the average price of flats in the borough rose by around 14.2% (£196,564), whilst average prices for terrace dwellings increased by 9.2% to £272,477. Average prices for semi-detached properties across the borough also increased by 6.2% (£321,569).

Figure 2 Dwelling Type Price Trend 2002 - 2013

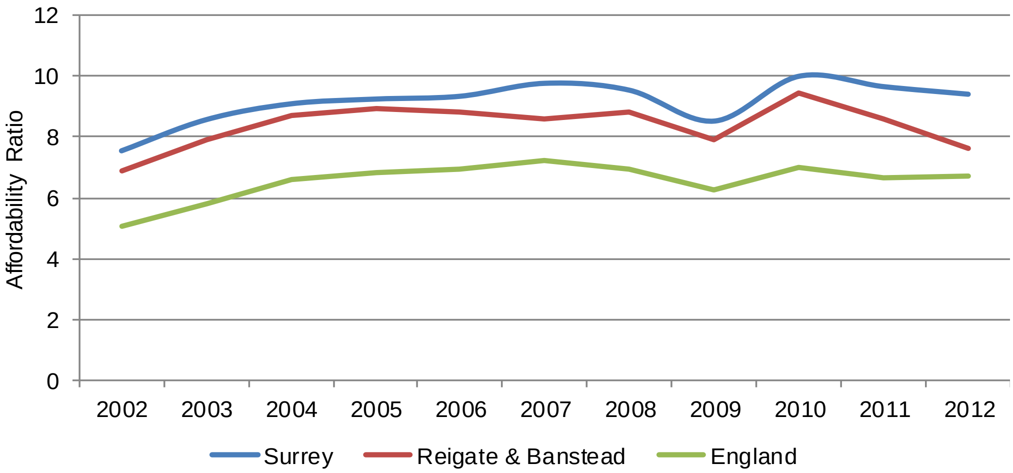


Affordability

Market affordability is recognised as one of the most significant challenges facing the housing market and one which has intensified over the past couple of decades. In the last year affordability has once again shown a slight improvement both regionally and locally, whilst affordability nationally has become exacerbated. Median house prices across England have increased marginally and are currently 6.70 times median annual income, compared to the previous year's figure of 6.65. Despite a slight improvement in affordability across Surrey in the last year, current median house prices across the region are 9.41 times median annual income, further highlighting there is still an insufficient supply of affordable properties across the region.

Conversely, Reigate & Banstead median house price is 7.65 times median annual income, a significant improvement from 8.59 recorded in the previous year and is still one of the most affordable areas to live in Surrey (figure 3 below)

Figure 3 Affordability Ratio Comparison 2002 - 2012

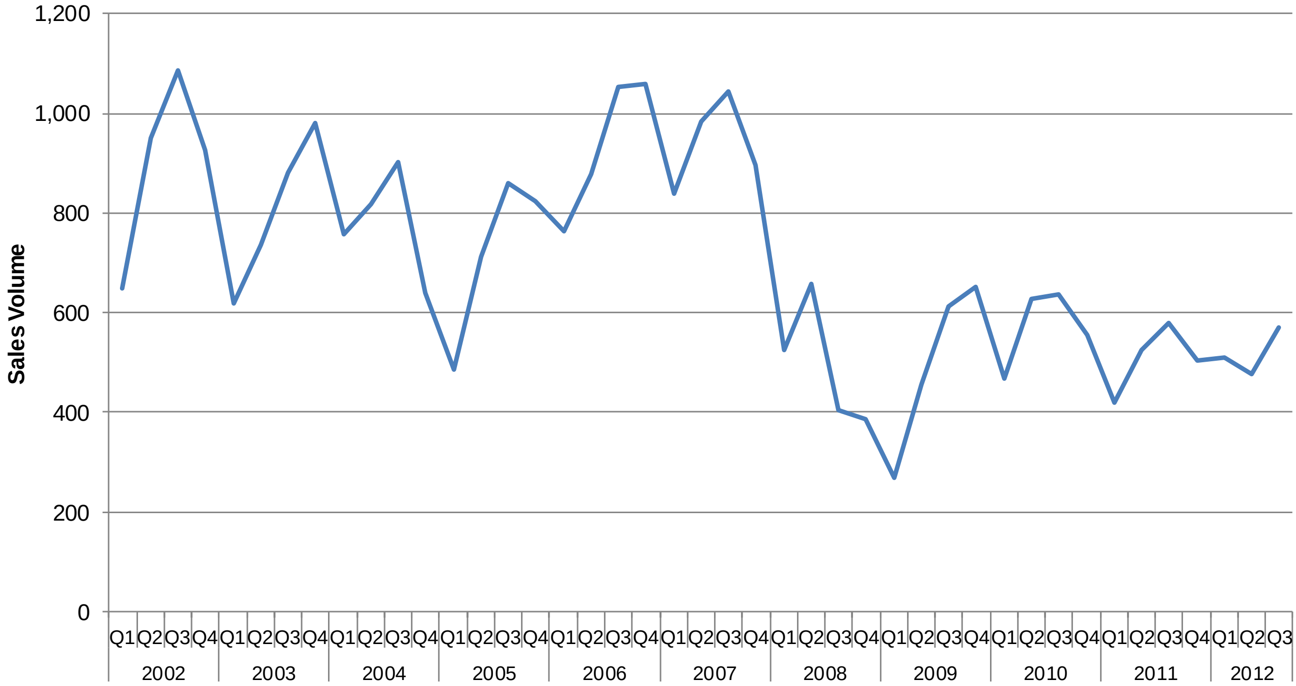


Despite the recent falls, affordability remains a pertinent issue and has been for the past decade. Since 2002, the national affordability ratio has risen from 5.07 to 6.70, exacerbated by the rapid growth in house prices in the mid 2000s. In recent years, this growth has stabilised, initially due to the strong employment market. However the economic downturn has had a negative impact on residential property prices.

Transaction Volumes

Transaction volumes remain constrained compared to the height of the market in 2007, due to the economic uncertainty which continues to impact upon lending and mortgage availability. A total of 2,061 transactions were recorded in the last year a slight increase from the previous year's figure of 2,027. Figure 4 below shows, market activity is still around half the peak level reached in the late 2007/early 2008.

Figure 4   Annual Sales Volume Trend 2002 - 2012



Summary of Housing Delivery

Figure 5 Summary of Housing Completions

1 April 2012 to 31 March 2013		Area 1 - Banstead		Area 2a - Redhill		Area 2b - Reigate		Area 3 - Horley		Total
		Small Sites	Large Sites	Small Sites	Large Sites	Small Sites	Large Sites	Small sites	Large Sites	
Completions	New Build	44	83	33	96	19	51	6	145	477
	Change of Use	4	3	1	0	0	0	0	0	8
	Conversions	0	0	5	10	8	0	0	0	23
	Total Completions	**48**	**86**	**39**	**106**	**27**	**51**	**6**	**145**	**508**
Losses	Demolitions	10	11	6	0	3	0	0	4	34
	Changes of Use	0	0	0	0	0	0	0	0	0
	No. of Units Before Conversion	0	0	1	2	2	0	0	0	5
	Total Losses	**10**	**11**	**7**	**2**	**5**	**0**	**0**	**4**	**39**
Total Net Gain		**38**	**75**	**32**	**104**	**22**	**51**	**6**	**141**	**469**

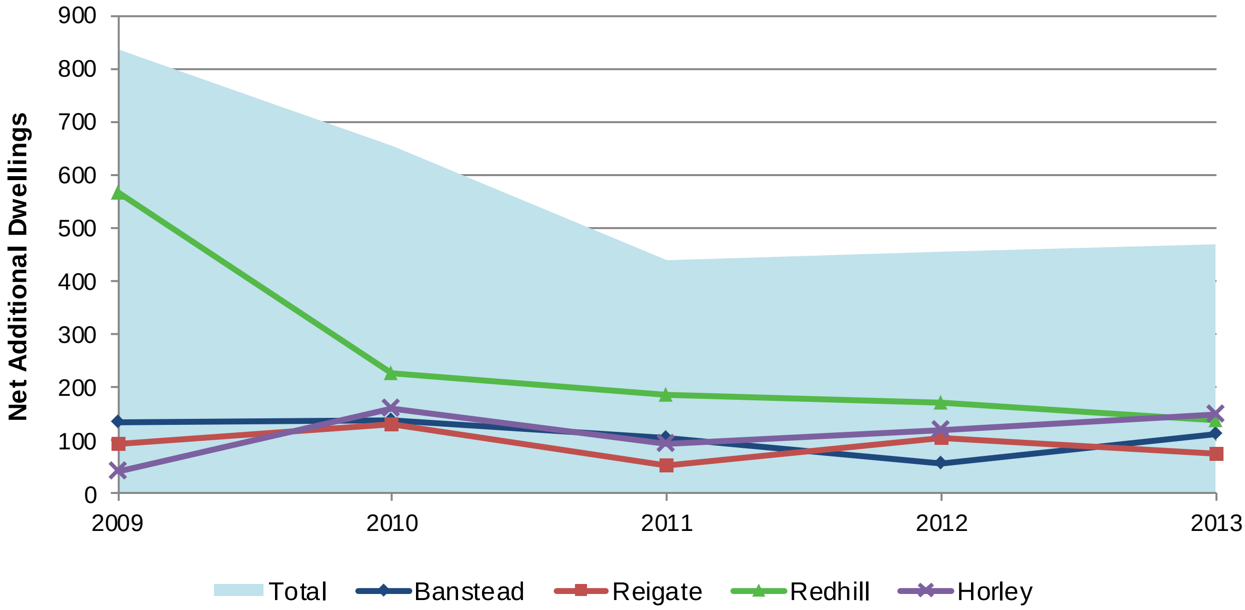
1 April 2012 to 31 March 2013 (Plan Period)	Area 1- Banstead	Area 2a – Redhill	Area 2b – Reigate	Area 3 - Horley	Total
Large Site Gross Completions	86	106	51	145	388
Large Site Losses	11	2	0	4	17
Large Site Net Gain	75	104	51	141	**371**
Small Site Gross Completions	48	39	27	6	120
Small Site Losses	10	7	5	0	22
Small Site Net Gain	38	32	22	6	**98**
Gross Completions	134	145	78	151	508
Losses	21	9	5	4	39
Total Net Gain	**113**	**136**	**73**	**147**	**469**

Delivery Trends

Overall Completion Rates in the last 5 years (2009-2013)

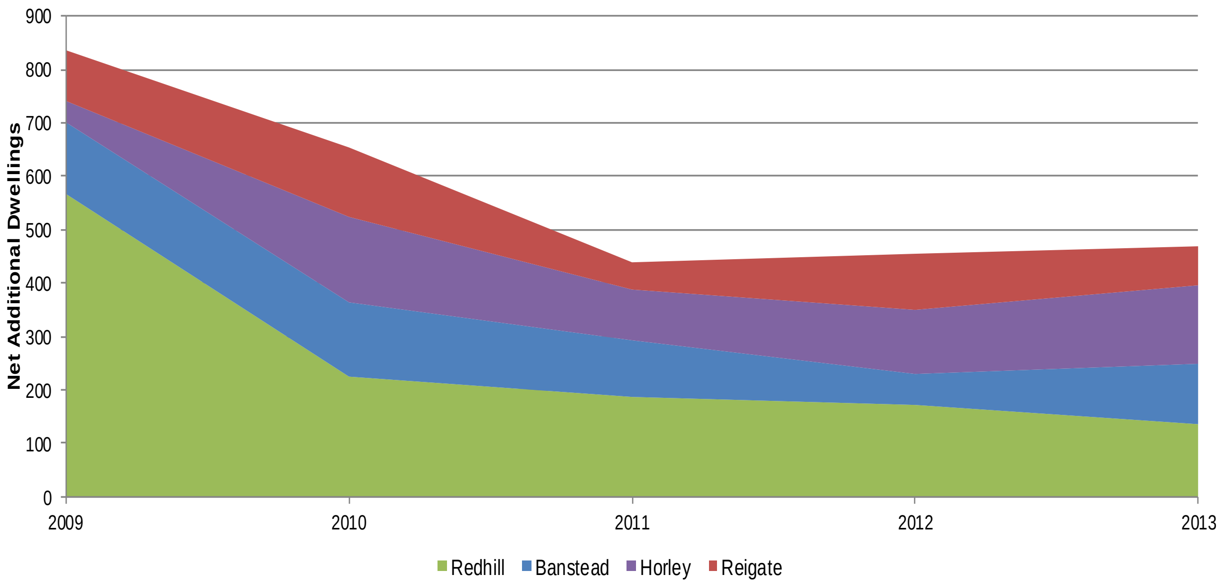
Net completions for the 2012-13 year stood at 469, an increase compared to the previous year. Gross completions, at 508, were also marginally above the level recorded in the previous year. Nationally, house building levels are showing signs of recovery partly down to several government initiatives to drive an increase in supply.

Figure 6 Net Completion Trend 2009 - 2013



In terms of spatial distribution, Horley (Area 3) contributed the largest proportion of net completions at 31%, the majority of which came from the continued development of the North East Sector. Redhill (Area 2a) was the second largest contributor accounting for 29% of net completions delivered in this area. Conversely, Reigate (Area 2b) made the smallest contribution at 16%, a significant drop in the proportion delivered in this area during the previous monitoring period.

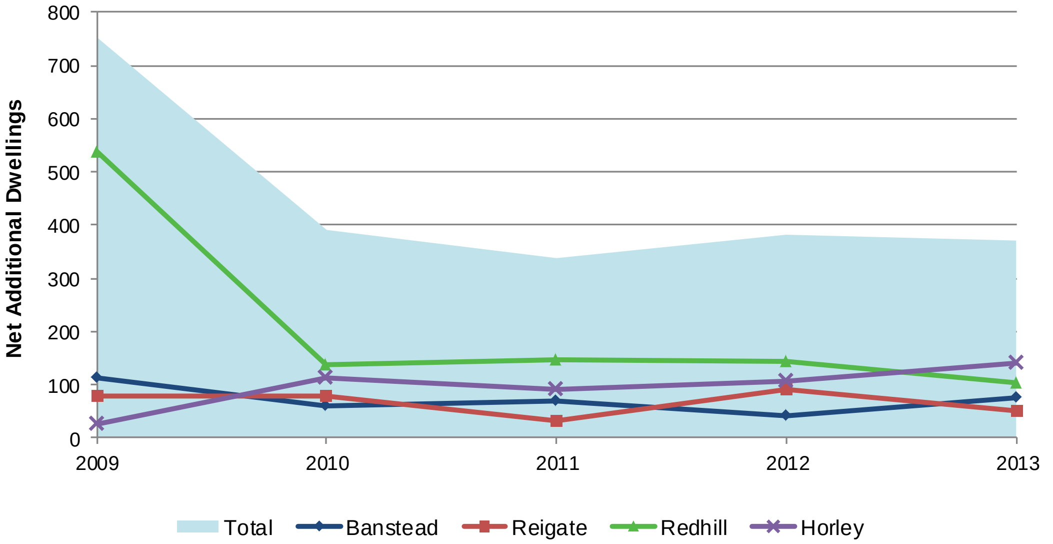
Figure 7 Area Contribution to Total Net Completions 2009 - 2013



Large Site Completion Rates

Over the past year total completions on large sites of 10 or more units have dropped and now account for 79% of the total. Similarly the number of net additional dwellings delivered on large sites with 10+ units has decreased marginally from 382 in 2011/12 down to 371 in 2012/13. In the last 5 years net completions on large sites have fluctuated, yet still remain below the 2009 figure, when completion rates peaked to 753. There has been a noticeable change in net completions across the borough's four areas with Banstead (Area 1) and Horley (Area 3) experiencing an increase in net completions on large sites up to 75 and 141 respectively. This is down to the continued development on the North East Sector and the completion on the former depot site at Whitmore Way in Horley, along with the new development on 22-28 Brighton Road site in Banstead. Against this Reigate (Area 2a) and Redhill (Area 2b) both saw a fall in large site net completions.

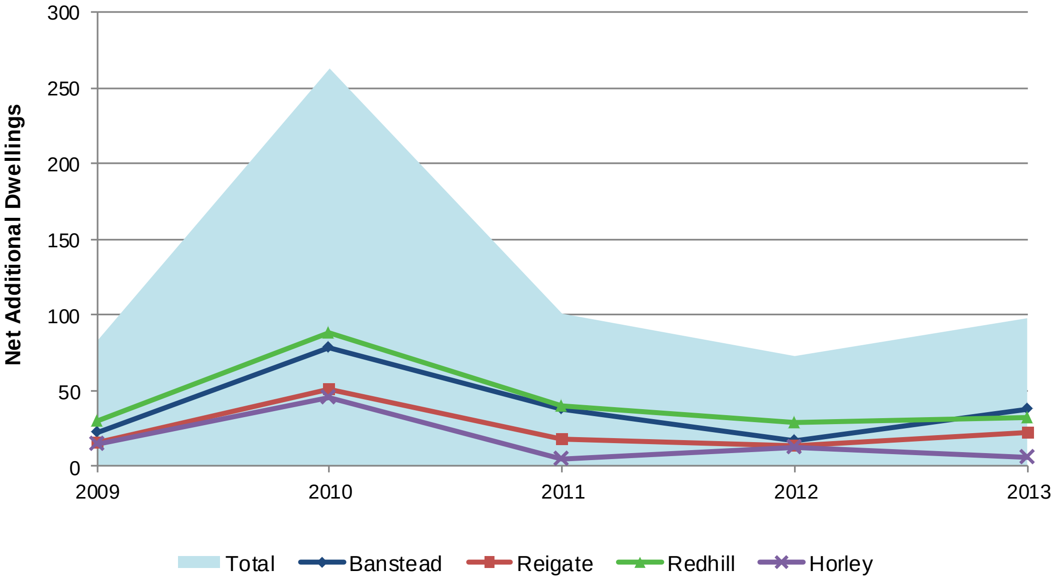
Figure 8 Large Site Net Completion Trend 2009 - 2013



Small Site Completion Rates

In the last year a total of 98 units were completed on small sites, an increase from the previous year's figure of 73. Once again Horley (Area 3) was the only area to see a continued fall in small site completions over the past year. All the other areas saw an increase in completions on small sites in particular, Banstead (Area 1) with a large proportion of completions coming from infilling.

Figure 9 Small Site Net Completion Trend 2009 - 2013

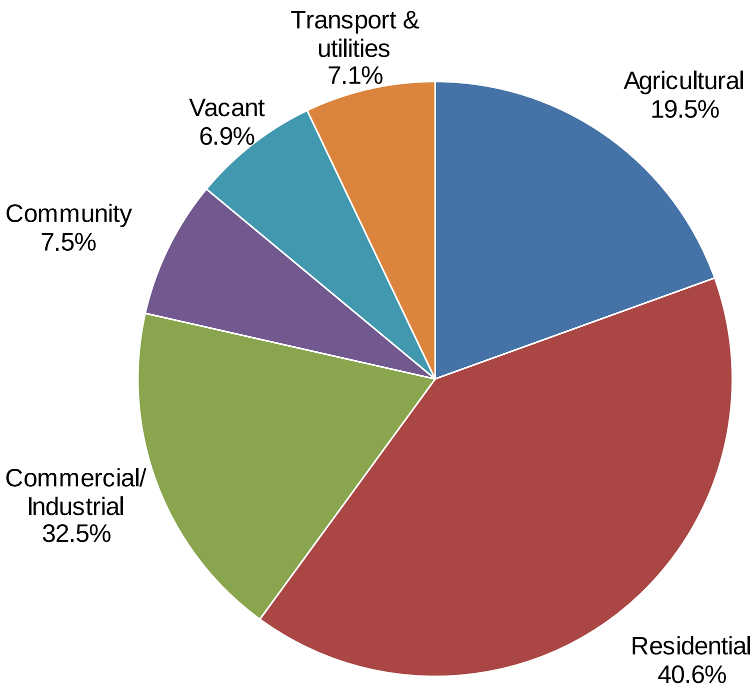


Completion Characteristics

Sources of Supply – Previous Land Use (PDL)

The primary source of completions on previously developed land (PDL) was once again on land previously in residential use, accounting for over 40% of all PDL in 2012/13. The general trend has shown that total residential use continues to fall from the previous monitoring year's figure, when such land use accounted for 43% of the total. For reference, developments on previously residential land typically include replacement dwellings, dwelling and plot subdivisions and infill or back land development. There has been an increase in the number of completions on vacant land (6.9%), primarily coming from the development on the Former Dairy site in Reigate. A small proportion of dwellings (7.1% have been completed on land previously used for transport and utilities, exclusively from the development on the Former Depot Site, Whitmore Way in Horley

Figure 10 Previous Land Use of Completed Dwellings



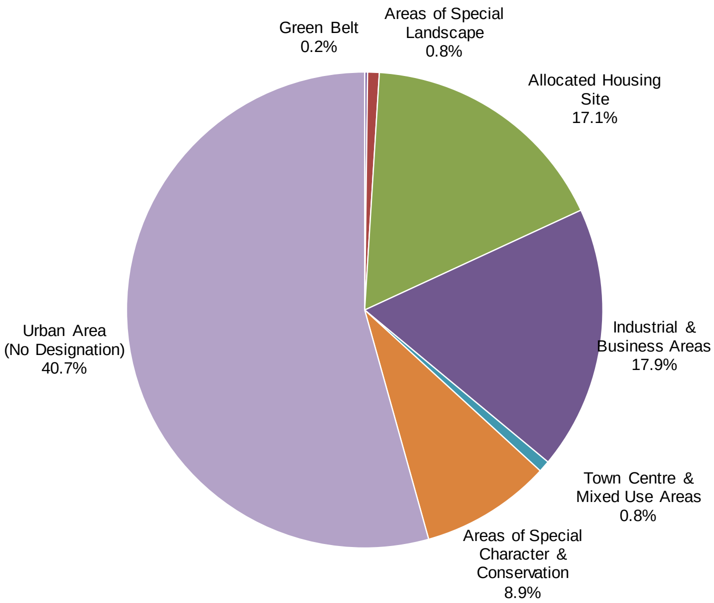
The Council's emerging Core Strategy Policy CS8 prioritises the use of previously developed land (PDL) in order to promote the efficient and sustainable use of land. Over the last year there has been an increase in completions on PDL up from 77% to 80% however, these figures are still below pre 2010 figures which exceeded 90%. The continued fall on PDL completions since 2010 is largely down to the on-going development on the Horley North East Sector and also the proposed housing development at Horley North West, both of which are on Greenfield land. Until these sites are completed the overall percentage of completions on PDL will be significantly lower than pre 2010 figures, as the vast majority of the boroughs housing will come from both Horley sites over the next few years. In the last year around 80% of all completions across the borough were on PDL. When the development of the Horley North East neighbourhood is excluded, the percentage of dwellings on PDL rises to 83%.

Figure 11 Previously Developed Land

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Dwellings on PDL	374	394	429	627	617	614	836	632	425	381	408
% on PDL	93.8	96.7	87.6	99.4	98.9	99.4	99.9	83.9	87.1	77.4	80.3

Sources of Supply – Designation

Figure 12 Designation of Completed Housing Sites



For the second consecutive year there has been no change in the total number of dwellings completed in urban areas that are not subject to any specific policy designations. This has stayed at around 41%. The percentage of completions within designated industrial/ business areas increased up to almost 18% compared to the previous year, most of which is located on the former Dairy Site, in Reigate, which was previously designated as employment land. All the remaining designation areas have seen a drop in the number of dwellings completed in the last year. Most noticeably is the number of housing completions within designated town centres and mixed use areas. Both have dropped significantly, since the last monitoring period and currently make up less than 1% of the total. This is largely due to no housing completions recorded across the borough's town centres, over the last year. Similarly, only 17% of completions were on allocated housing sites, a drop from 19% recorded in the previous year. This will increase significantly once the Horley NE sector is completed.

Housing Density

Policy CS8 of the emerging Core Strategy states all development should be at a density which reflects local character and levels of accessibility. The detailed local approach to housing density will be set out in the proposed Development Management Policies DPD.

Figure 13 Density of Completions 2013

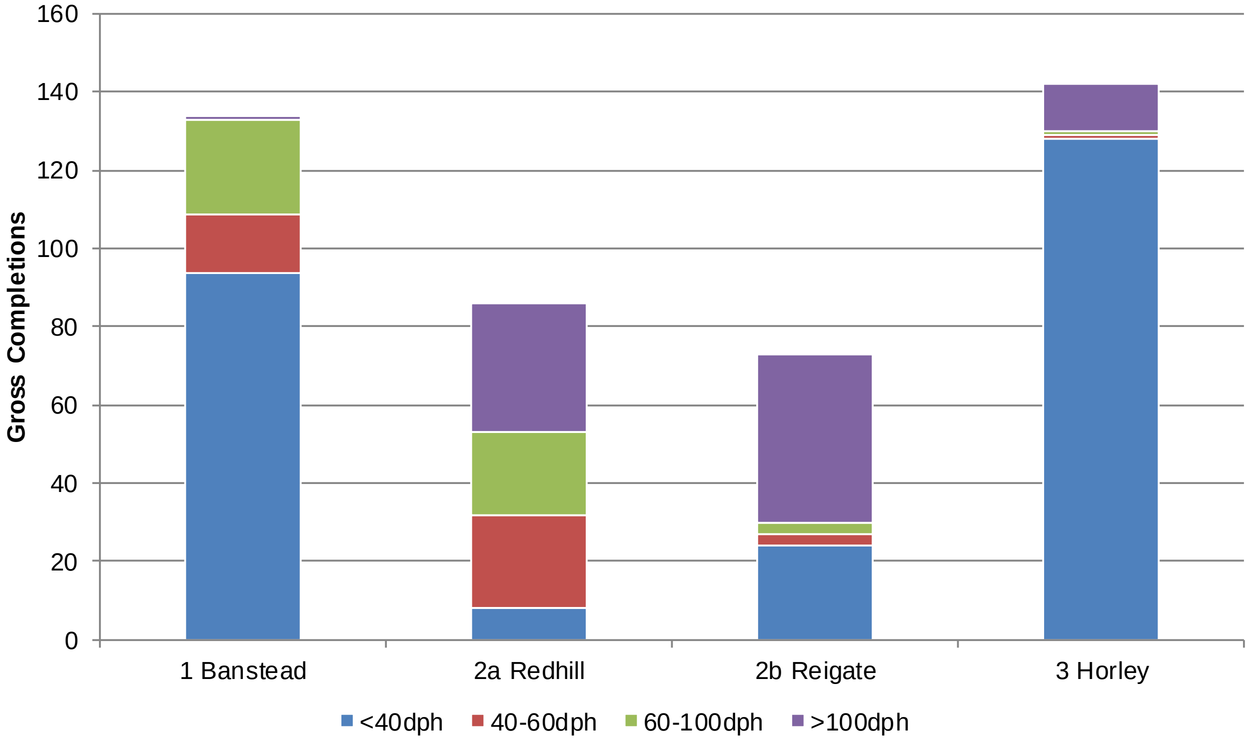
	Less than 40dph	40-60dph	60-100dph	More than 100dph
Number of Units	254	43	49	89
Percentage (%)	58.4%	9.9%	11.3%	20.4%

The majority of housing completions were at densities below 40dph accounting for 58% of the total, an increase from the previous monitoring year's figure of 207 units (42%). Since the last monitoring period there has been a drop in completed units most notably at a density between 40-60dph making up just under 10%. Similarly, completed dwellings at densities exceeding 100dph also fell over the last year accounting for 20% of total completions. Figure 15 overleaf demonstrates the variation in the density of completions across the four borough areas.

A high proportion of dwellings completed in Banstead (Area 1) and Horley (Area 3) were at densities below 40dph and is largely reflected by their character and more limited public transport accessibility. Compared to Redhill (Area 2a) and Reigate (Area 2b) where higher densities of

100dph and above are more commonly found, which is not surprizing given their more dense urban character and closer proximity to public transport.

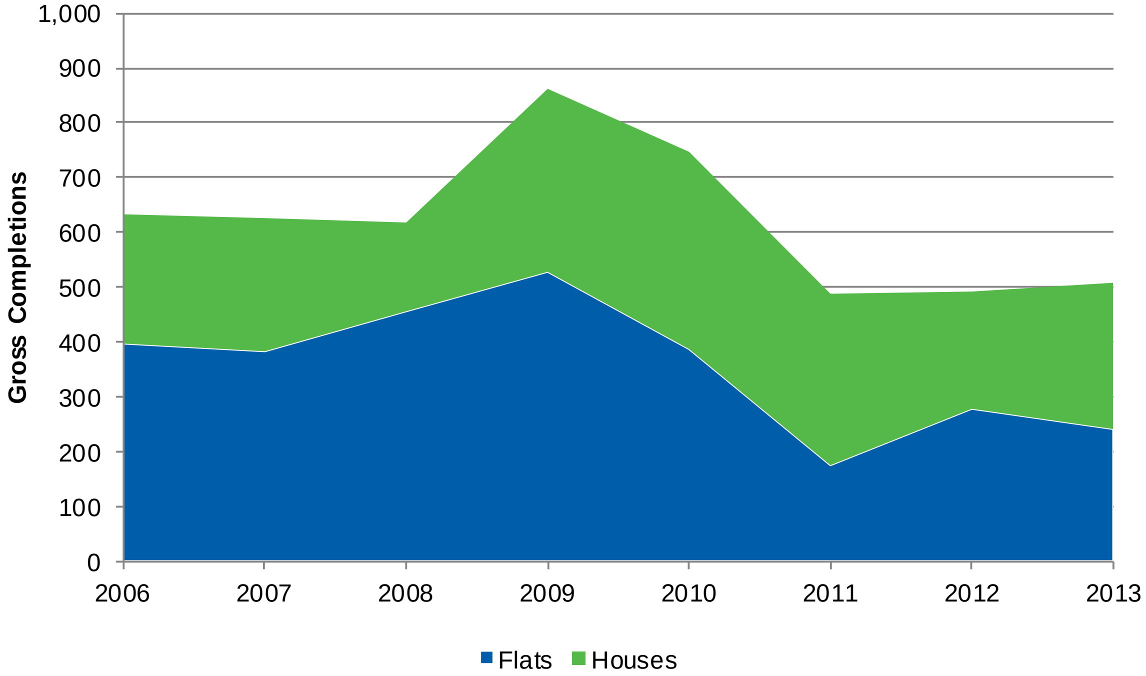
Figure 14 Density of Completions by Borough Area



Dwelling Size & Type

Figure 15 shows that over the past year, there has been an increase in housing completions accounting for 53% of the total, compared to total flat completions which has fallen down to 47% and is broadly in line with the long term trend since 2006. Total completions of flats and houses across the borough continue to be below the peak levels reached in 2009.

Figure 15 Breakdown by Dwelling Type



Conversely, Figure 16 below shows the split between houses and flats varies markedly across the four borough areas, with again a notable difference between the profile of development in Banstead and Horley to that of Redhill and Reigate.

Figure 16 Proportion of Houses & Flats by Borough Area

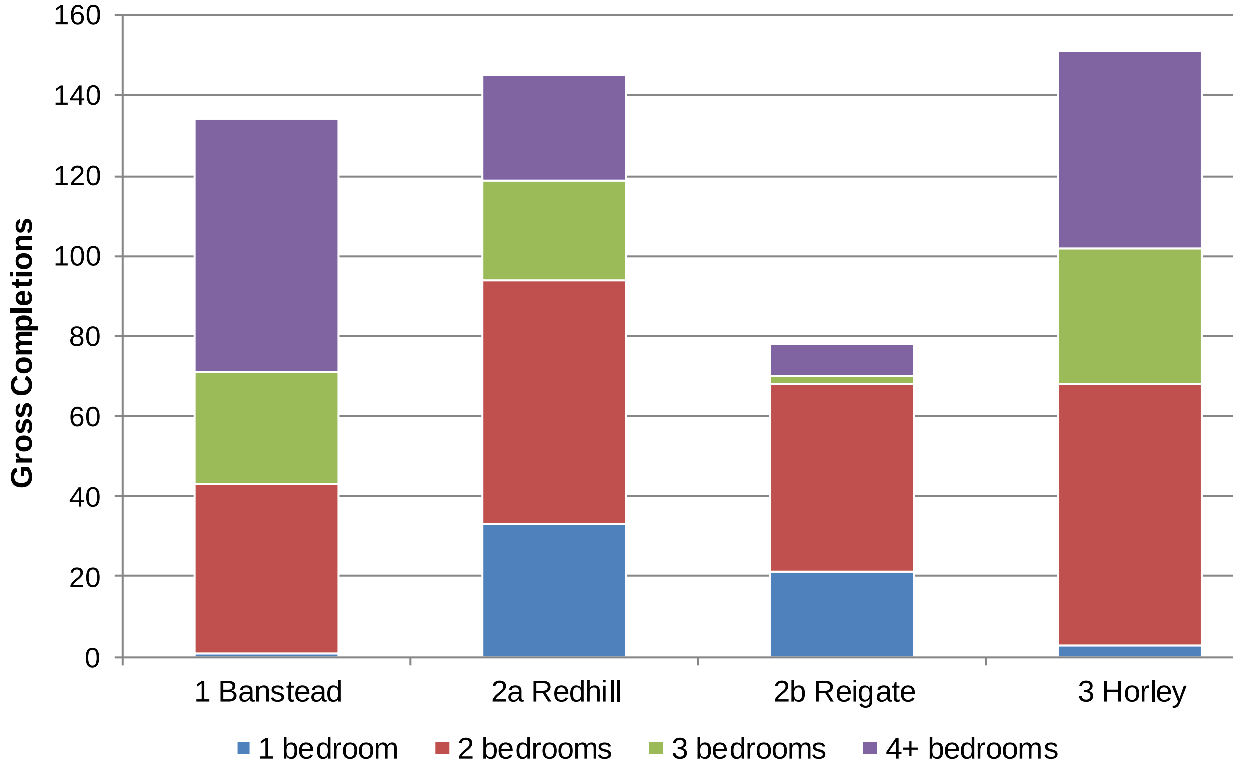
	Flats	Houses
Area 1 – Banstead	39 (29%)	95 (71%)
Area 2a – Redhill	90 (62%)	55 (38%)
Area 2b - Reigate	69 (88%)	9 (12%)
Area 3 - Horley	43 (28%)	108 (72%)

For the second consecutive year, the majority of completions were 2 bedroom dwellings accounting for 42% of the total; conversley1 bedroom units had the fewest number of completions at 11%. Over the past year 3 bedroom units made up 18% of total completions whilst 29% were 4 bedrooms or larger. When compared to the latest SHMA recommendations, the Council once again under-delivered in terms of larger 3 and 4+ bedroom dwellings and over delivered on smaller 1 and 2 bedroom properties. Figure 18 below show the variation in dwelling size across the borough's four areas.

Figure 17 Completions by Size Compared to SHMA Recommendations

	Completions 2013	SHMA 2012 Market Housing Recommendation
1 bedroom	11%	40%
2 bedrooms	42%	
3 bedrooms	18%	60%
4+ bedrooms	29%	

Figure 18 Completed Dwelling Size by Borough Area

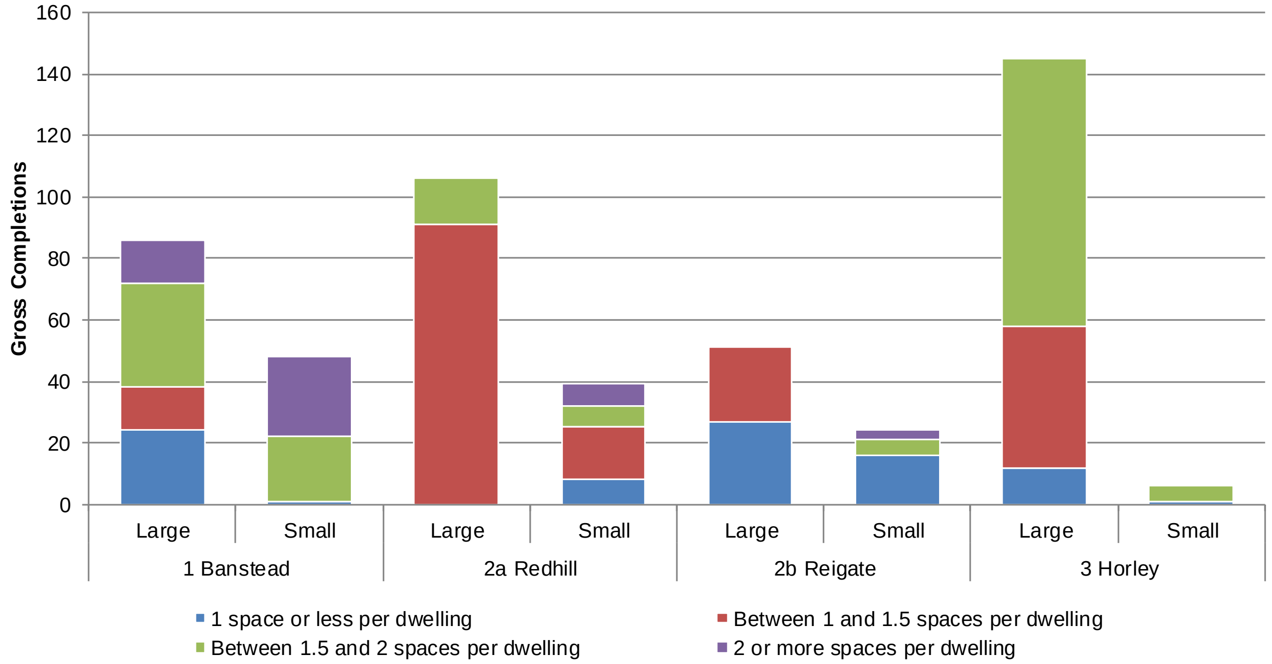


Car Parking Standards

In the last year there has been an increase in the average number of parking spaces per completed dwellings. The figure for last year was 1.54, an increase from the previous year (1.32).The majority of dwellings completed across the borough in this monitoring period had between 1 and 2 parking spaces, combined accounted for 72%, whilst 18% had one parking space or less and just under 10% had more than 2 parking spaces per dwelling.

Figure 19 shows parking space provision varies considerably across the four borough areas and largely reflects their location and levels of accessibility. As evident in Banstead (Area 1) where the majority of completed dwellings had on average between 1.5 and 2 parking spaces per dwellings. The same can be said for Horley (Area 3) with a high proportion of completed dwellings on the Horley North East Sector having between 1.5 and 2 parking spaces. Conversely, Reigate (Area 2b) has seen an increase in the number of completed dwellings over the last year with 1 parking space or less per dwelling.

Figure 19   Average Parking Spaces on Completed Dwellings by Site Size



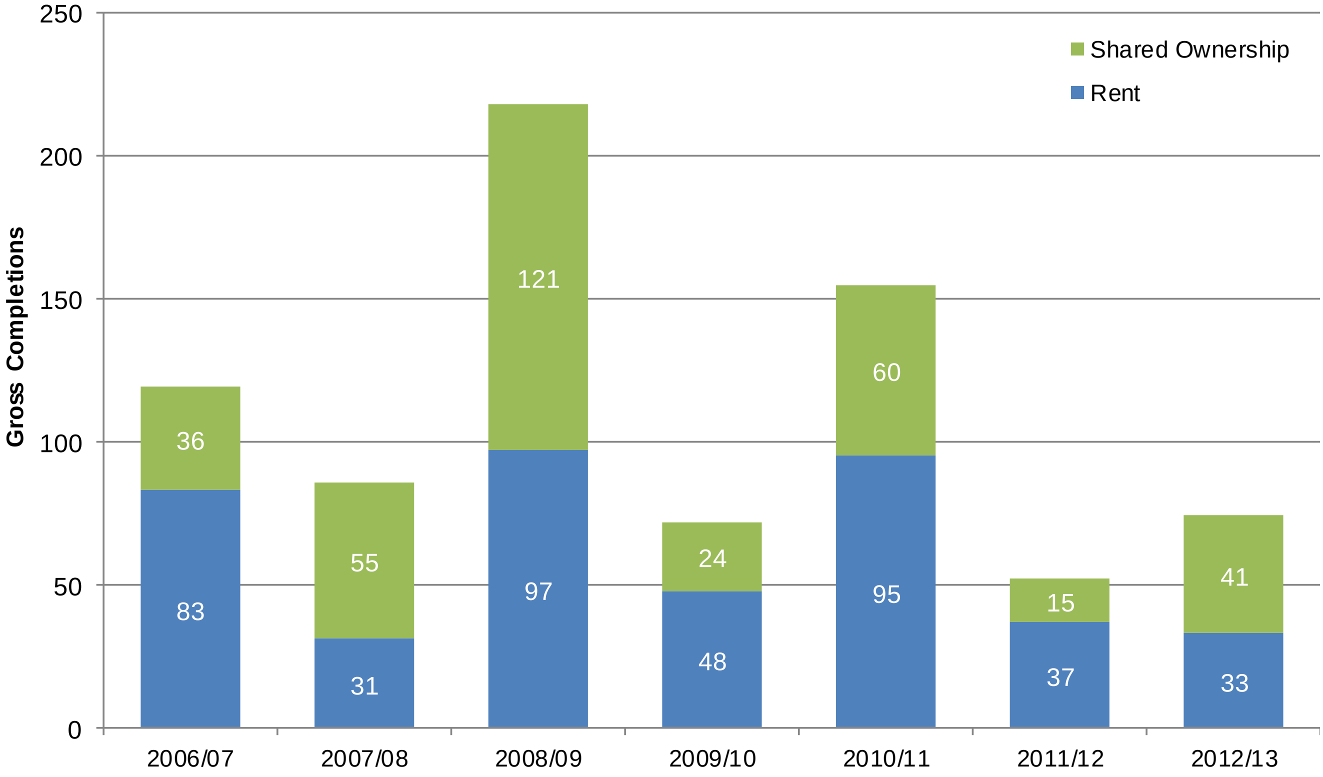
Affordable Housing

Figure 20   Affordable Housing Completions Summary

	Gross Completions
Total Units Completed 2012/13	508
Affordable Completions	74
Affordable (%)	**14.6%**
Social Rented	33
Social Rented (%)	**44.6%**

A total of 74 gross affordable housing units were completed in the last year, accounting for almost 15% of all gross completions, an increase compared to the previous monitoring year. However, total completions on social rented units have dropped over the past year down to 33 units equal to almost 45% of the total. The majority of affordable housing units were completed on the Former depot site at Whitmore Way, Horley North East and the Mount Green Estate in Reigate.

Figure 21 Affordable Housing Completions Trend



New Permission Characteristics

Number of New Permissions

Figure 22 Number of New Units Permitted

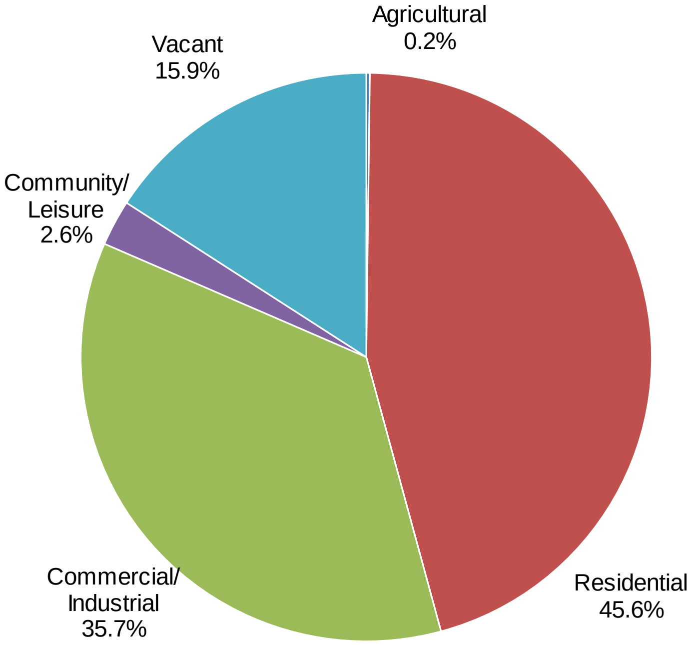
		Area 1 - Banstead	Area 2a - Redhill	Area 2b - Reigate	Area 3 - Horley	TOTAL
Large (10+ units)	Gross	60	129	48	91	**328**
	Net	57	99	48	91	**295**
Small (1-9 units)	Gross	110	44	42	23	**219**
	Net	78	19	33	20	**150**
All Sites	Gross	**170**	**173**	**90**	**114**	**547**
	Net	**135**	**118**	**81**	**111**	**445**

A total of 113 applications with the potential to deliver 445 net additional dwellings were granted permission during the past year. This represents around a 42% increase of potential additional dwellings compared to the previous year (2011-12).

The majority of new permissions (net) during 2012/13 were on large sites accounting for 66% of the total compared to 2011/12 when significantly more new permissions were granted on small sites (61% of the total). The location of development influences the total number of gross permissions granted across the borough as shown in figure 22 above, with Banstead (Area 1) and Redhill (Area 2a) both making up around 31% of all gross permissions.

Source of New Permissions – Previous Land Use

Figure 23 Previous Land Use of New Permissions



Following the recent trend, the majority of gross new housing permissions granted this year were on sites which are already in residential use (45.6%), followed by land previously in commercial use. The later has increased significantly over the past year and now accounts for 36% of all gross new permissions and includes the proposed redevelopment on the cleared Newman House site in Horley and the former dairy site in Reigate.

Source of New Permissions – Designation

Once again the majority of dwellings permitted over the last year are in undesignated urban areas and urban open land, accounting for 59% of the total. There has been an increase in the total number of dwellings permitted in town and local centres (21%) since the last monitoring period. A further 10% were located within Conservation Areas or Residential Areas of Special Character (RASCs) and 8% were within Green Belt, the majority of which are replacements of existing dwellings. Once again the number of permitted dwellings within designated industrial or business areas accounted for a small percentage of the total at 2%.

Housing Density

The majority of dwellings permitted in the last year were at densities below 40dph accounting for over 44% of the total, significantly below the previous years figure of 60%. Despite a fall in total permitted dwellings below 40dph, the figure is still above the 2009-10 figure of 41%. More than 35% of dwellings permitted in the borough over the past year were at densities over 100dph, a significant increase from the 2011-12 figure of 13%. This is largely as a result of the cleared Newman House site in Horley, which has recently been granted planning permission for 90 dwellings at densities over 100dph.

Figure 25 Density of New Permissions

	Less than 40dph	40-60dph	60-100dph	More than 100dph
Number of Units	243	6	106	192
Percentage (%)	44.4%	1.1%	19.4%	35.1%

Dwelling Type & Size

Figure 26 Size & Type of Newly Permitted Dwellings

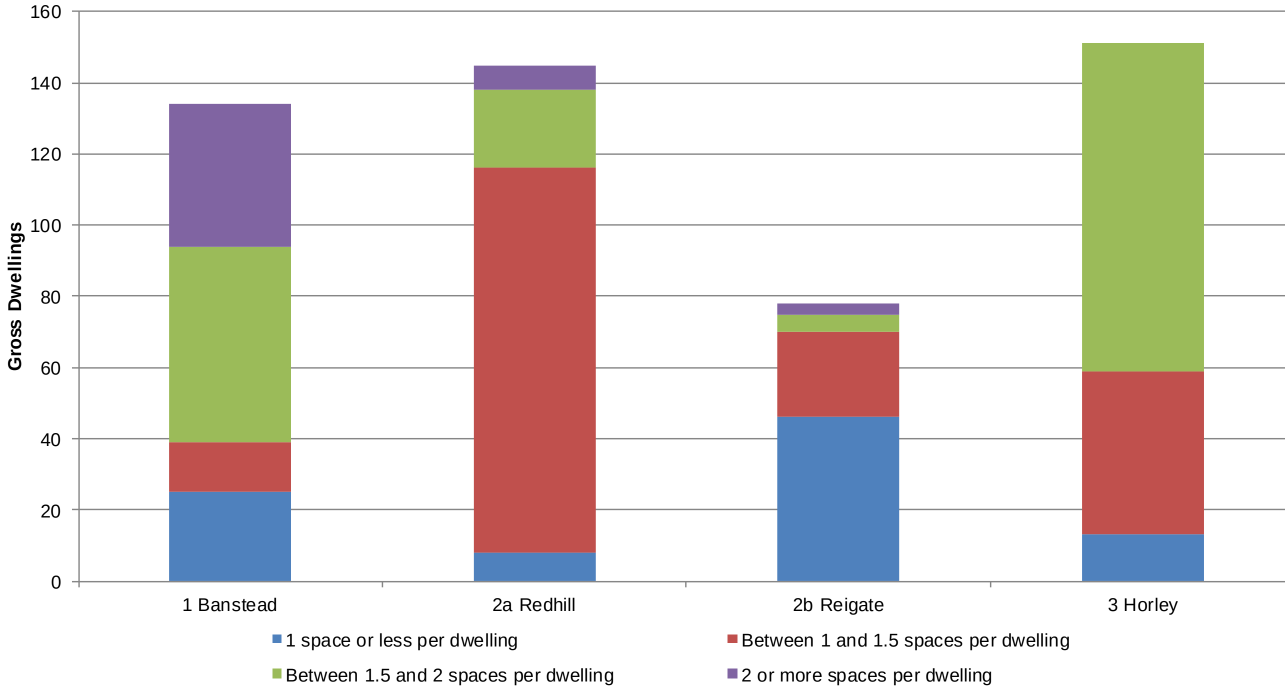
	Flats	Houses	Total
1 bedroom	96	28	124 (22.7%)
2 bedrooms	240	24	264 (48.4%)
3 bedrooms	4	46	50 (9.1%)
4+ bedrooms	0	108	108 (19.8%)
Total	340 (62.3%)	206 (37.7%)	546

There has been a significant increase in the number of flats permitted in the past year accounting for 62%, whilst the total number of houses permitted has fallen sharply down to 38%. The total number of 1 & 2 bedroom flats outweighs the number of permitted 1 & 2 bedroom houses and also 3 & 4+ bedroom houses. The sharp increase in the number of smaller units (1& 2 bedroom) flats comes from a number of large scale developments permitted over the past year and includes; Newman House in Horley and the Former Liquid & Envy nightclub in Redhill. There is notable variation in the dwellings permitted across the four borough areas in terms of their size and type. In Banstead (area 1) the majority of dwellings permitted were for 3 or more bedrooms accounting for 74% of the total, whilst a significant proportion of 1& 2 bedroom units were permitted in Redhill (area 2) and Horley (area 3).

Car Parking Standards

Over the past year the average number of car parking spaces per dwelling for new permissions granted in the borough has dropped down to 1.57, compared to the previous years monitoring figure of 1.76. A total of 92 (18%) dwellings were granted permission with 1 parking space or less, a slight drop from the previous monitoring year and a further 174 (34%) permissions granted had on average, between 1 and 1.5 parking spaces. Once again the level of parking provision per dwelling varies across the borough the main contributing factors being; location and levels of access to amenities, public transport, etc, as shown in figure 27 below. On average Banstead (Area 1 has more parking spaces per dwelling which is expected given its lower levels of accessibility. Conversely, Redhill (Area 2b) and Reigate (Area 2a) tend to have fewer parking spaces per dwelling, as the majority of development within these areas is in or on the edge of town centres, which is in close proximity to public transport and local amenities.

Figure 27 Parking Spaces on Newly Permitted Dwellings by Area



Housing Supply & Delivery Position

Plan Period Performance

Whilst not formally adopted, the Core Strategy (Policy CS11) will set the housing requirement for the borough moving forward to 2027. The document has been subject to examination and formal testing through hearing sessions and the Inspector has not recommended that any modification to the housing requirement is necessary to ensure soundness of the plan. Performance is therefore monitoring against this target.

Figure 27 Performance against Core Strategy – 2012 to 2027

Housing requirement	Net completions to date	Average per year	Completed	Residual	Residual per annum
6,900	469	469	14.7%	6,431	459

Figure 27 summarises the progress that has been made against the Core Strategy housing requirement. Only a single year has passed and during that year 469 net additional units were delivered against the requirement for 460. This slight overprovision leaves an outstanding requirement for 6,431 additional dwellings over the next 14 years, equivalent to just over 459 additional homes per annum.

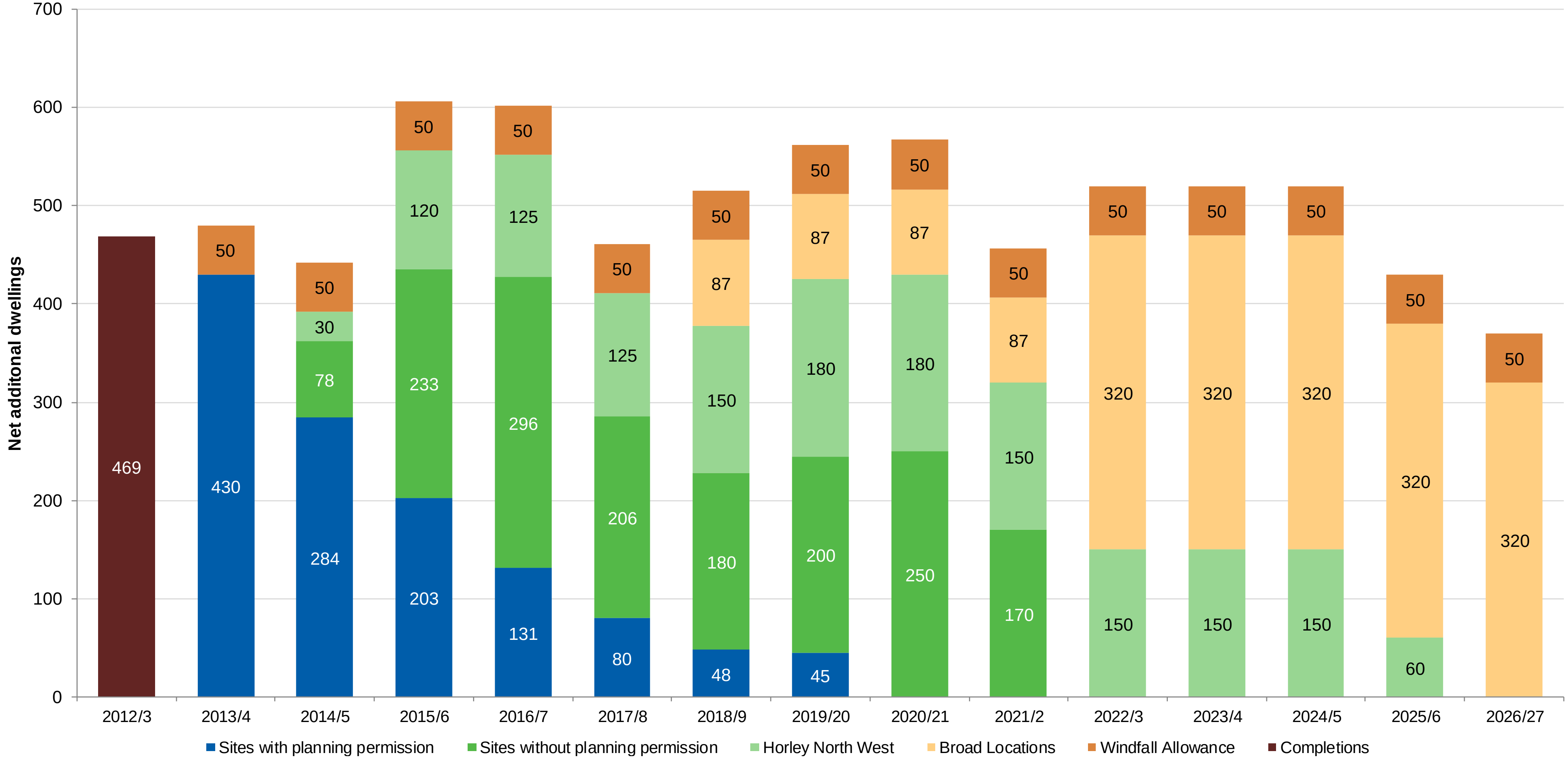
Future Supply

Figures 28 and 29 overleaf set out a monitoring trajectory of future housing supply in Reigate & Banstead across the Core Strategy Plan Period. The trajectory reflects the latest position in terms of stock of extant planning permissions and the deliverability of sites without planning permission. It also includes an allowance for windfalls and identified broad locations.

Figure 28 Detailed Housing Trajectory

			Trajectory															TOTAL
			2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2012-2027
Area 1: The North Downs	Sites with Planning Permission	Large Permissions	75	71	31	28	4	2										211
		Small Permissions	37	78	43	17	13	3										191
	SHLAA Sites	Preston Regeneration Area		0	16	10	70	80	70	60	30	0	0	0	0	0	0	336
		Rest of Area		0	14	25	0	0	0	0	10	0	0	0	0	0	0	49
	Broad Locations	Banstead Town Centre							34	34	34	34						136
TOTAL Area 1 (The North Downs)			112	149	104	80	87	85	104	94	74	34	0	0	0	0	0	923
Area 2(a): Wealden Greensand Ridge	Sites with Planning Permission	Large Permissions	104	77	41	36	10	5										272
		Small Permissions	32	34	21	11	9	2										109
	SHLAA Sites	Redhill Regeneration Area		0	0	90	96	71	30	45	105	125	0	0	0	0	0	562
		Merstham Regeneration Area		0	0	45	20	20	0	0	0	0	0	0	0	0	0	85
		Rest of Area		0	10	0	30	35	25	65	30	45	0	0	0	0	0	240
	Broad Locations	Redhill Town Centre							40	40	40	40						160
TOTAL Area 2(a) (Redhill)			136	110	72	182	165	133	95	150	175	210	0	0	0	0	0	1,428
Area 2(b): Wealden Greensand Ridge	Sites with Planning Permission	Large Permissions	51	17	13	11	5	2										99
		Small Permissions	23	48	29	15	12	3										130
	SHLAA Sites			0	0	18	30	0	10	0	0	0	0	0	0	0	0	58
TOTAL Area 2(b) (Reigate and remainder)			74	65	42	43	47	6	10	0	0	0	0	0	0	0	0	287
Area 3: Low Weald	Sites with Planning Permission	Large Permissions	141	70	86	76	71	60	48	45								598
		Small Permissions	6	36	21	9	7	2										81
	SHLAA Sites			0	38	45	50	0	45	30	75	0	0	0	0	0	0	283
	Allocated Sites	Horley North West			30	120	125	125	150	180	180	150	150	150	150	60	0	1,570
TOTAL Area 3 (Low Weald)			147	107	175	250	253	187	243	255	255	150	150	150	150	60	0	2,532
		Borough-wide Broad Locations							13	13	13	13	320	320	320	320	320	1,652
		Windfalls	0	50	50	50	50	50	50	50	50	50	50	50	50	50	50	700
GRAND TOTAL DELIVERY: POSITION AT 31 MARCH 2013			469	480	442	606	602	461	515	562	567	457	520	520	520	430	370	7,522

Figure 29 Illustrated Trajectory



Five Year Land Supply Position

This section sets out the five year deliverable housing land supply position in Reigate & Banstead. The five year supply runs from 1 April 2013 to 31 March 2018. The National Planning Policy Framework (NPPF) requires local planning authorities to identify and update annually a supply of specific deliverable[1] sites sufficient to provide five years worth of housing against their housing requirements. To establish the five year position, the analysis below is based on the findings of the 2012 Strategic Housing Land Availability Assessment and on-going analysis of identified sites.

Five Year Housing Requirement

The Council's emerging Core Strategy will set the housing requirement for the borough moving forward. Policy CS11 of the document sets out that at least 6,900 homes will be delivered in the borough between 2012 and 2027, equivalent to 460 homes per annum.

Whilst the Core Strategy is not yet adopted, it is clearly at a very advanced stage of preparation. Hearing sessions on the Council's Core Strategy were held in May 2013 and, as such, its contents including the housing figure in CS11 have been independently tested. Hearings were adjourned to enable the Council to consult on 'main modifications' proposed by both itself and the Inspector. The Inspector has not recommended that any modification to the housing requirement in Policy CS11 is necessary to secure soundness of the document. It can reasonably be concluded that the requirement is therefore considered sound. The Council therefore considers it appropriate to base assessment of five year land supply on this figure.

On this basis, the Council considers that the five year requirement, with no account for past delivery or the NPPF buffer is 2,300 (460 x 5) dwellings.

The NPPF requires local planning authorities to include a buffer within the five year supply. This buffer should be 5%; increased to 20% where there has been a record of persistent under delivery of housing. There was significant over supply of housing during the period of the SEP (2006-2012) – equivalent to some 20% above the requirement at the time. For this reason, it is considered that the 5% figure is applicable to Reigate & Banstead.

The overall five year requirement is therefore 2,300 units with an additional buffer of 115 units. This equates to an annual requirement of 483 dwellings. These figures will be used to determine whether a five year supply can be demonstrated.

1 The NPPF states that "To be considered deliverable sites should be available now, offer a suitable location for development now, and be achievable with a realistic prospect that housing will be delivered on the site within five years and in particular that development of the site is viable. Sites with planning permission should be considered deliverable until permission expires, unless there is clear evidence that schemes will not be implemented within five years, for example they will not be viable, there is no longer a demand for the type of units or sites have long term phasing plans."

Sources of Deliverable Land Supply

In accordance with the National Planning Policy Framework, the sources of supply which are included within the five year supply comprise:

- Sites with planning permission (outline or full)
- Specific sites without planning permission
- Windfall allowance

Sites with Planning Permission

In line with the National Planning Policy Framework (NPPF), sites with planning permission should be considered deliverable unless there is evidence that they will not be implemented within five years.

As at 1 April 2013, there are a total of 1,424 outstanding net additional dwellings on sites with planning permission. A total of 202 units are excluded from this figure to reflect instances where the Council has evidence that sites are unlikely to be implemented (either at all or in their permitted form).

A further 93 units are excluded to reflect a highly conservative estimate of the phasing of the remaining 353 units at the Horley North East Sector. There is a reasonable prospect that all of the units could be completed within the five year period: plans provided by the developers indicate that Phase 2 is likely to be completed and occupied by March 2015 whilst information contained in the construction statement for Phase 3 (prepared in November 2012) indicates a commencement date of 2014 and a completion programme of 3 years. Nonetheless, we adopt a conservative approach.

Therefore, the total number of deliverable dwellings (i.e. in years 1-5) on sites under construction is 1,129 net additional dwellings.

As context, 723 of these units are on sites which are currently under construction and the remaining 406 are on sites which have yet to be implemented.

More detail is provided in Tables A & B of the Appendix.

The total capacity from sites with planning permission in the five year supply is therefore 1,129 net additional dwellings.

Specific Sites without Planning Permission

Through the SHLAA and plan-making process, the Council has identified a number of specific sites without planning permission which are deliverable within the five year supply. The deliverable capacity on these sites (i.e. those units which will come forward in the five years to 2018 taking account of any phasing plans) is **1,213 net additional dwellings.**

All of these sites have been assessed for suitability and achievability and regular contact with landowners or promoters has been maintained to ascertain availability and likely timing. They are therefore deliverable in the context of the definition contained within the NPPF.

Full detail of the site relied upon in this category are set out in Table C of the Appendix

Windfall Allowance

The NPPF allows local planning authorities to include an allowance for windfall sites in the five year supply if there is compelling evidence that such sites consistently become available in the local area and will continue to form a reliable source of supply. However, it is clear that the allowance should not include development on residential gardens. The SHLAA practice guidance defines windfalls as:

“Those which have not been specifically identified as available in the local plan process. They comprise previously-developed sites which have unexpectedly become available. These could include, for example, large sites resulting from, for example, a factory closure or small sites such as

a residential conversion or a new flat over a shop."

Windfalls make a significant contribution to housing supply in Reigate & Banstead. Since 2005, a total of 2,249 additional dwellings have been permitted on windfall sites, representing some 52% of all permissions. Additionally, monitoring information shows that 1,956 additional units have been delivered on windfall sites since 2006, again equating to almost half of all completions. The contribution made by small sites and windfalls to housing supply in the area is widely recognised and was also accepted by the Inspector at the previous Core Strategy examination.

Assessment of a robust windfall allowance has been undertaken through the 2012 SHLAA and detailed analysis can be found in Appendix 5 of the 2012 SHLAA. Taking account of sites and broad locations specifically identified within through the SHLAA process, the SHLAA calculates a figure of 50 per annum. As such, a total allowance of **250 additional dwellings** is included within the five year supply in line with the provisions of the NPPF.

The Council has taken a conservative approach and all forms of residential intensification[2], not simply development on garden land, have been excluded from the allowance. Residential intensification forms a significant part of windfall supply and analysis of recent trends suggests they alone have contributed an additional 167 units per annum. Furthermore, the recent introduction of permitted development rights for office to residential uses will lead to a short term upsurge in such developments. These two factors demonstrate that there is considerable scope for even greater windfall development in the borough than the 50 dwellings per annum which has been allowed for.

Summary of Five Year Land Supply Position

Figure 30 below sets out the current deliverable land supply in Reigate & Banstead and identifies a total capacity of **2,592 net additional dwellings.** This represents a five year supply with a 12.7% buffer, over and above that required by the NPPF. Put another way, it represents a supply equivalent to 5.37 years against the Core Strategy annual requirement plus the NPPF 5% buffer.

Figure 30 Summary of Five Year Land Supply

Source		
1)	Sites with planning permission	1,129
2)	Sites without planning permission	813
3)	Horley North West Sector	400
4)	Specific Deliverable Sites (1+2+3)	2,342
5)	Windfall allowance	250
6)	**Total Capacity (4+5)**	**2,592**
7)	Core Strategy Annual Requirement	460
8)	Annualised over/under supply	0
9)	Residual annual requirement (7-8)	460
10)	Total five year requirement	2,300
11)	**Additional buffer**	**292**
12)	**Buffer expressed as a percentage**	**12.7%**

2 For clarification, residential intensification is taken to mean all developments involving the redevelopment (not conversion) of existing residential sites. This includes – but is not limited to – instances of curtilage development, backland developments involving the demolition of "donor" properties or the intensification of a single residential plot by replacing a single house with several or a block of flats.

Appendix

Table A: Large Sites (10+ Units) with Planning Permission in the Five Year Supply

Application Reference	Site Address	Ward	Implementation Status @ 1 April 2013	Gross Dwellings Permitted	Net Dwellings Permitted	Units completed @ 31 March 2013	Total net remaining @ 1 April 2013	Net Deliverable by 31 March 2018
12/01950/F	Blue Haze, Outwood Lane, Chipstead	CHW	Unimplemented	13	12	0	12	12
11/01440/F	Traffic Garages, 41 Walton Street	TW	Unimplemented	10	10	0	10	10
12/00341/F	Former Ship Public House, Copse Road	MSJ	Unimplemented	12	12	0	12	12
09/00729/OUT	The Sea Cadet Association, 2 Hooley Lane	RE	Unimplemented	11	11	0	11	11
11/00048/F	Redstone Hall, 10 Redstone Hill	RE	Unimplemented	11	11	0	11	11
11/02165/F	Former Crown Buildings, 73-75 London Road	RW	Unimplemented	14	14	0	14	14
11/01903/F	Church Hall, Yorke Road, Reigate	RC	Unimplemented	12	12	0	12	12
12/01989/F	9 Dovers Green Road, Reigate	SPW	Unimplemented	12	12	0	12	12
12/01881/F	Newman House, Victoria Road, Horley	HC	Unimplemented	90	90	0	90	90
09/00141/OUT	Former Horley Education Centre, Court Lodge Road	HW	Unimplemented	15	14	0	14	14
10/01490/F	Former Valley Service Station, 2 Outwood Lane	CHW	Under Construction	11	11	0	11	11
12/01276/F	Dacre Cottage, Outwood Lane, Chipstead	CHW	Under Construction	10	9	0	9	9
10/00179/F	Kingswood Warren, 41 Woodland Way	KBH	Under Construction	22	22	6	16	16
11/01087/F	Cro Madra *et al*, St Monicas Road, Kingswood	KBH	Under Construction	22	17	3	14	14
11/01804/F	Tealby & Hillerton, Brighton Road	KBH	Under Construction	13	11	0	11	11
12/01988/F	Kingswood Mitsubishi, 3-4 Waterhouse Lane, Kingswood, Tadworth	KBH	Under Construction	14	14	0	14	14
10/01048/F	359-365 Reigate Road & 68-72 Partridge Mead, Epsom Downs	N	Under Construction	12	10	2	8	8
12/01584/F	141-147 Nork Way & 37 & 39 Parsonsfield Road	N	Under Construction	10	9	0	9	9
11/00973/F	Brackenwood, Heath Drive	TW	Under Construction	10	9	0	9	9
12/01885/F	Former BTP Training Centre, St Cross, Sandlands Grove, Walton on the Hill	TW	Under Construction	13	13	0	13	13
10/02138/F	The Causeway Public House, 1 Horley Road, Redhill	EW	Under Construction	28	28	6	22	22
10/01423/F	Woodlands Court, 23 Woodlands Road	EW	Under Construction	18	14	0	14	14
08/00743/F	Home Farm, Quality Street	M	Under Construction	10	9	9	0	0
04/02411/F	L/A Former Holmethorpe Quarry (Watercolour)	RE	Under Construction	551	551	524	27	27
11/01893/F	Land at Trowers Way/The Kilns, Redhill	RE	Under Construction	37	37	0	37	37
12/00424/F	Alton House, Carlton Road	RW	Under Construction	12	2	0	2	2
12/02030/F	Colne House, Linkfield Lane, Redhill	RW	Under Construction	19	18	0	18	18
10/00104/F	93A & 95 Doods Road	RH	Under Construction	14	12	12	0	0
12/00059/F	Former Dairy, Warren Street, Reigate	RH	Under Construction	10	10	0	10	10
12/00631/F	Wray Coppice House, Oaks Road	RH	Under Construction	14	14	0	14	14
04/01778/OUT	L/A Langshott & Lake Lane (Horley NE Sector)	HE	Under Construction	710	710	357	353	260
Total Net Deliverable								**817**

Table B: Summary of Small Sites (Less than 10 Units) with Planning Permission in the Five Year Supply

Implementation Status	Borough Area	Gross Dwellings Permitted	Net Dwellings Permitted	Net Remaining @ 1 April 2013	Net Deliverable by31 March 2018
Under Construction	Area 1 – Banstead	131	92	91	91
	Area 2a – Redhill	35	30	30	30
	Area 2b- Reigate	59	47	45	45
	Area 3 – Horley	48	39	39	39
Not Implemented	Area 1 – Banstead	94	63	63	63
	Area 2a – Redhill	56	47	47	47
	Area 2b- Reigate	73	62	62	62
	Area 3 – Horley	41	36	36	36
				Total Net Deliverable	**413**

Table C: Sites without Planning Permission in the Five Year Supply

Site Address	Ward	Total Net Capacity	Net Deliverable in five year supply
Horley North West Sector, Meath Green, Horley	HW	1,510	400
Land at The Grove, Horley	HC	30	30
Former garage site, Victoria Road, Horley	HC	50	50
Former Court Lodge Infants School, Court Lodge Road, Horley	HW	18	18
Former Iron Horse Public House, Bletchingley Road, Merstham	M	10	10
Merstham Library, Weldon Way, Merstham	M	20	20
Former Oakley Centre, Radstock Way, Merstham	M	15	15
Land at Purbeck Close, Merstham	M	40	40
Merland Rise Recreation Ground, Preston	P	130	70
Former De Burgh School, Preston	P	180	80
Land at Longfield Crescent, garage blocks at Longfield Crescent and Longmere Gardens, Preston	P	26	26
Redhill Station Car Park, Princess Way, Redhill	RE	150	150
Marketfield Way, Redhill	RE	21	21
Former Longmead Adult Education Centre, Holland Close, Redhill	RW	25	25
Former Liquid & Envy Nightclub, Marketfield Way, Redhill	RE	61	61
Former Red House School, Kingswood	KBH	14	14
Former SESW Social Club, Frenches Road, Redhill	RW	10	10
Red Cross Hall, London Road, Reigate	RC	10	10
Land at Kingswood Station, Kingswood	KBH	25	25
RNIB ‘Redhill College’, Philanthropic Road, Redhill	EW	65	65
Chatham Court & Linden Court, Lesbourne Road, Reigate	RC	38	38
Former Langwood, 121 Smallfield Road, Horley	HE	35	35
			1,213

Monitoring Publications

Regular Monitors:

Areas for Small Businesses

Provides a list of all uses in the Borough's seven Areas for Small Businesses (Annual)

Commercial Commitments

Contains the amounts, types and location of all commercial commitments i.e. premises with outstanding planning permissions or vacant floorspace (Annual)

Housing Delivery

Provides information on general housing market trends and the delivery of the amount, type and location of housing commitments in the Borough (Annual)

Industrial Estates

Contains an analysis of occupational trends in the Borough's nine main Industrial Estates including a schedule of occupiers (Annual)

Local Centres

Provides information on retail provision in the Borough's eighteen local shopping centres (Annual)

Town Centres

Provides information on the occupiers, together with vacancies and shop type of all premises within the Borough's four Town and Village Centres (Bi-annual)

Population and Demographic Information

These publications are available on the Council website:

http://www.reigate-banstead.gov.uk

Search for: *"monitors":*

For further information on the content or other planning policy monitoring, please contact:

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