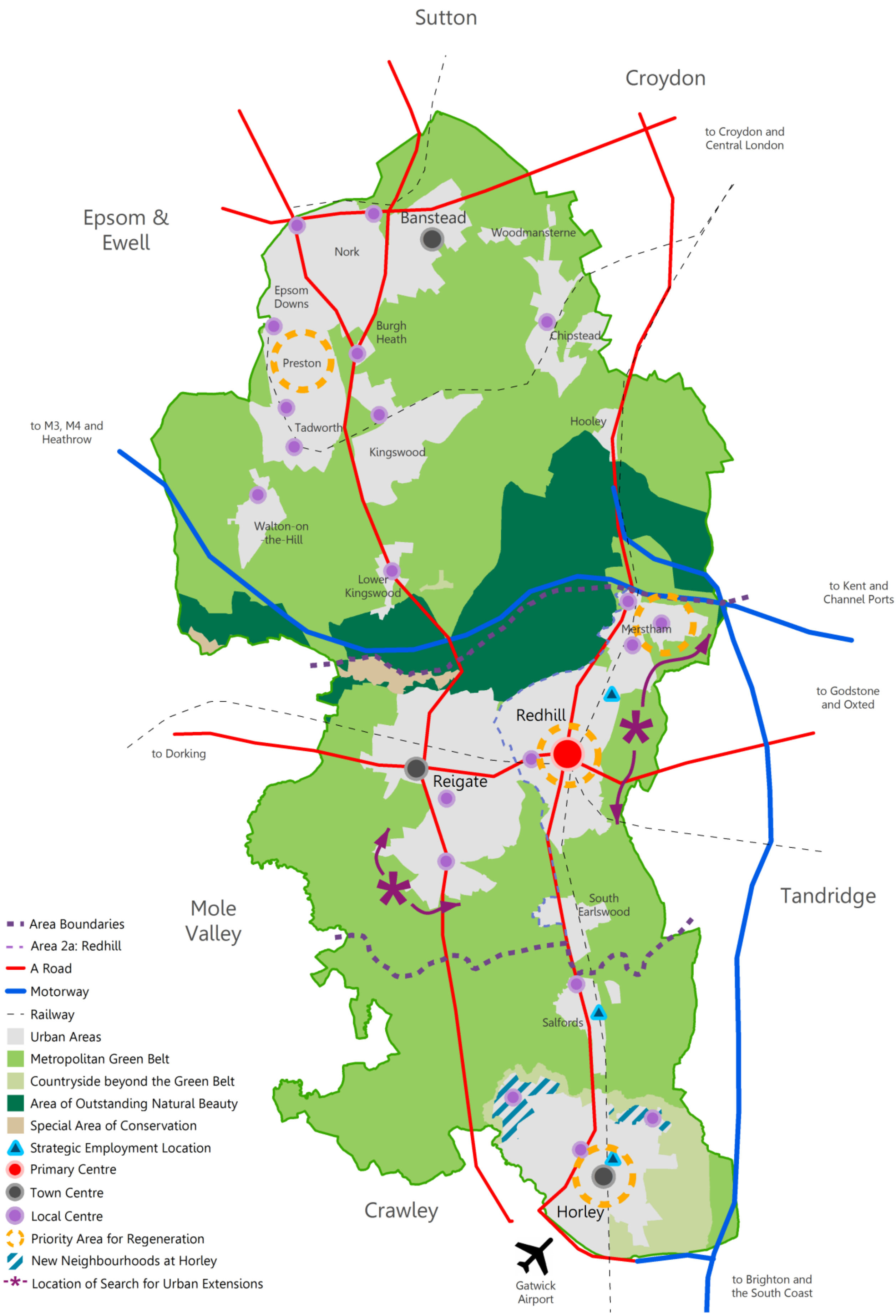
Housing Delivery Monitor

Including Five Year Land Supply
Position at 31 March 2015

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 2015

Contents

Please Note:

The information contained within this monitor details housing completions and outstanding permissions within Reigate & Banstead during the period 1 April 2014 to 31 March 2015. The housing trajectory and five year land supply is compiled using monitoring data at 31 March 2015 and information from the 2014 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
- 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 is in the process of being replaced by new local planning documents. The Core Strategy detailing how much growth will take place until 2027 and subsequently the overarching strategic approach for delivering new homes in the borough was formally adopted in July 2014. The Development Management Plan containing detailed policies and housing allocations is currently being prepared.

Relevant Emerging Core Strategy Policies and Indicators

Policy	Monitoring Indicator
CS10	% of new residential dwellings built on previously developed land. Target – at least 50%.
CS13	At least 6,900 additional dwellings between 2012 and 2027.
CS14	Type and size of unit completed compared to SHMA recommendations. Appropriate mix of dwellings in line with housing need, site size & characteristic.
CS15	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.
CS17	% of residential dwellings built within 15 minutes of a public transport stop. Target – at least 80%.

The Core Strategy is available on the Council's web site:

www.reigate-banstead.gov.uk/corestrategy

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

The Nationwide House Price Index reports a 5.1% increase in the average house prices for the last twelve months (from £180,264 in March 2014 to £189,454 in March 2015). This compares to a 9.5% increase within 2013. The lower percentage increase is due to wages remaining almost stagnant and new affordability rules introduced for mortgages. However, mortgage rates have remained low and the government has tried to entice more people to buy property through stamp duty changes and furthering policies such as Help to Buy, which enable those with smaller deposits to purchase property.

Nationwide report regional variations, in particular they note stronger rates of house price growth for the South of England than Wales, Scotland and the North of England. However, they note that commuter districts such as St Albans and Reading saw greater inflation rates than London.

The Department for Communities and Local Government report that within 2014 118,760 homes were completed, an 8% increase on the previous year. This is below the 250,000 needed to tackle the country's housing crisis. Whilst this is 11% higher than the low point seen in 2010, it is 25% below the average rate of building seen before the financial crisis.

Despite the increase in completions, the National House Building Council report that the number of registrations remains below the average seen over the last four decades (145,174 compared to 153,000). In particular they report regional variations in the number of new builds being registered with Yorkshire and the Humber, Wales, Northern Ireland, the West Midlands and the South East all outpacing London. In particular they note a 24% increase in the number of detached homes being registered but note that that that flats and maisonettes still account for greatest number of new builds (33% compared to 26% detached houses).

Borough Key Messages

- **House Prices:** Land Registry reports that within 2014 average house prices within Reigate and Banstead saw a 5.2% increase (from £384,000 to £404,000). They note that whilst all types of properties saw an increase, terraced and semi-detached properties saw the largest increases (13% and 12% respectively).
- **Affordability:** Affordability ratio improved slightly from 9.10 to 9.03, this is due to a smaller percentage increase in house prices compared to wages.
- **Sales:** Within the last twelve months there has been a slight decline in the number of transactions recorded (7% from 2,846 to 2,661). Despite this decrease the figure remains significantly above the low level recorded in 2008-2009 (1,782).
- **Housing Delivery:** Core Strategy Policy CS13 plans for 6,900 new homes to be delivered between 2012 and 2027, this equates to an annual average of 460 additional dwellings. At least 5,800 of these additional dwellings will come from the existing urban area, whilst the remainder will be from sustainable broad locations set out in Core Strategy Policy CS8.
- **Completions:** Within the last twelve months 420 net additional dwellings were completed, this is a slight fall from 433 completed within 2013-2014.
- **Previously Developed Land (PDL):** Within the last twelve months 69% of completed properties were built on previously developed land, this is above the 50% target set out in Core Strategy Policy CS10.
- **New Permissions:** Within the past twelve months 130 planning applications were granted planning permission, equating to 2,063 gross dwellings and 1,967 net additional dwellings.

Housing Market

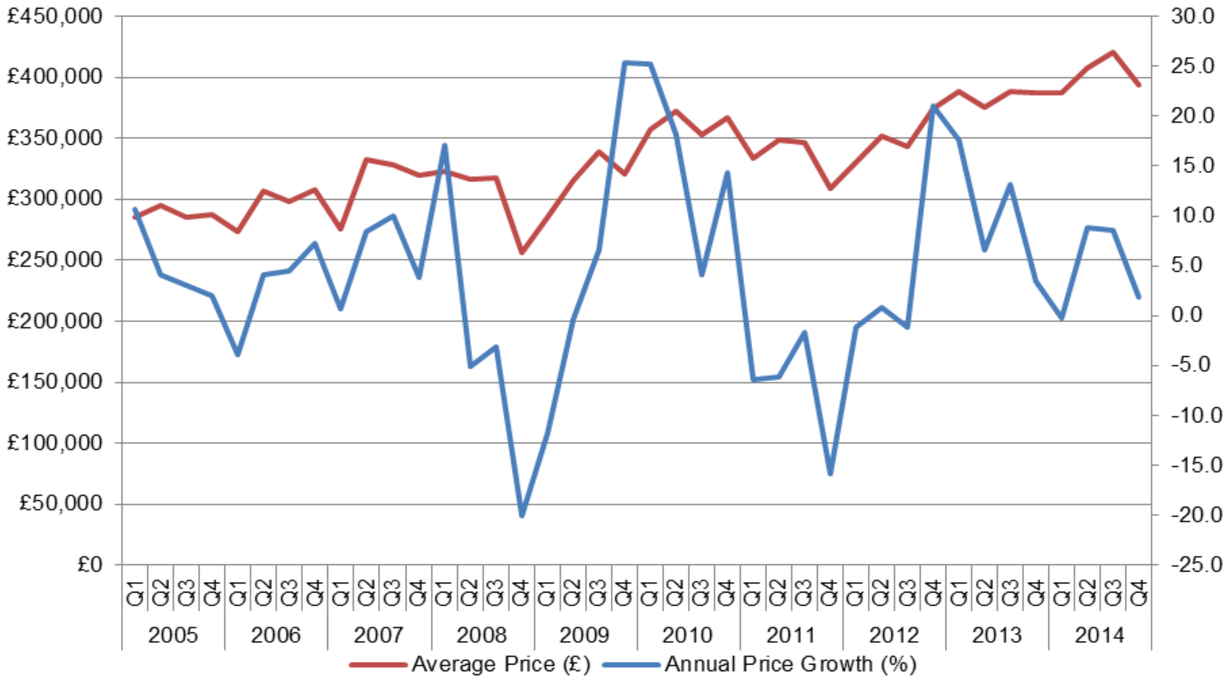
Average House Prices

Within the last twelve months, Land Registry report that average house prices within the borough have increased from £384,000 to £404,000.

Figure 12 shows that despite an overall increase in the average house price for the borough since 2005 there have been fluctuations, most noticeably a sharp drop in 2008 at the height of the economic recession. Within the last twelve months, despite a slight decrease in quarter 4 (a national trend), house prices have increased.

It is however important to note that average house prices can be particularly sensitive to the mix and type of homes sold over the period, which can be influenced by local housing developments.

Figure 1 Average House Price 2005-2015



House Price Inflation

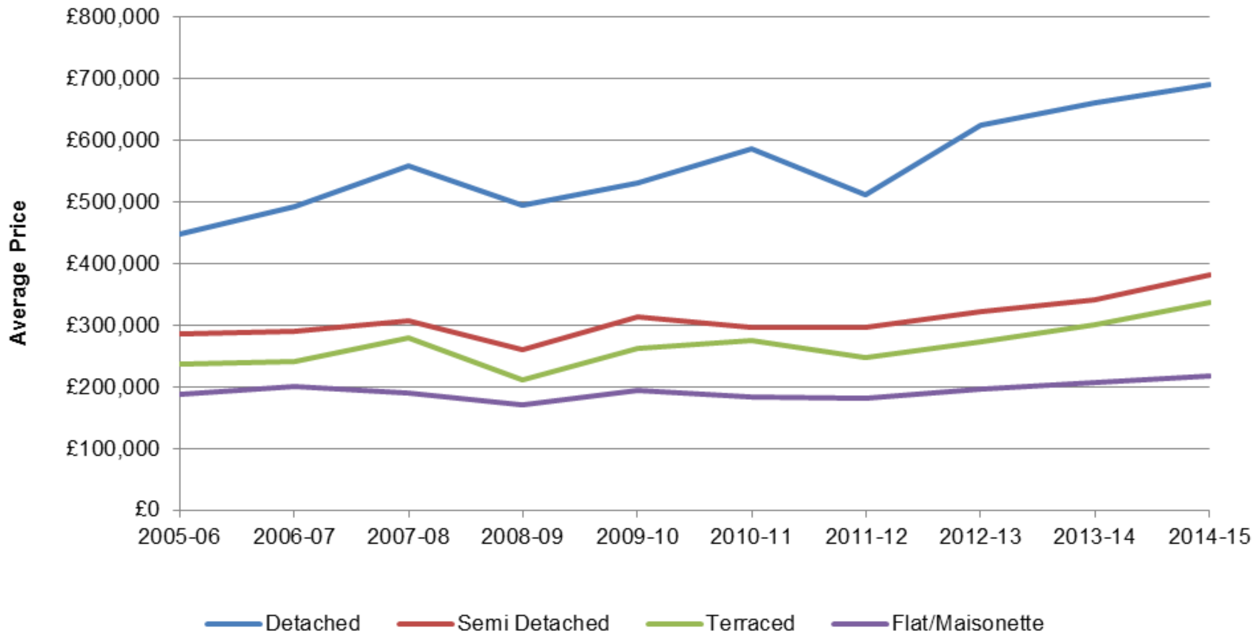
Land Registry data shows that within the last year average house prices in Reigate and Banstead increased by 5.2%. Figure 1 shows that since 2005 inflation rates across the borough have fluctuated considerably, reaching its lowest level in 2008 and its peak in 2009. Again, it is important to note that local analysis of house price movements is particularly sensitive to type/mix of homes sold, which can be influenced by local housing development.

Price Breakdown by Dwelling Type

Figure 2 illustrates an increase in the average house price for all types of properties within the last twelve months. Terraced and semi-detached properties saw the largest increases (13% and 12% respectively) whilst flats saw a 5% increase and detached properties saw a 4% increase.

Within the borough over the last twelve months the average asking price for a flat was £219,000; terraced property £338,000; semi-detached £382,000; and detached £690,000.

Figure 2 Dwelling Type Price Trend 2005 – 2015

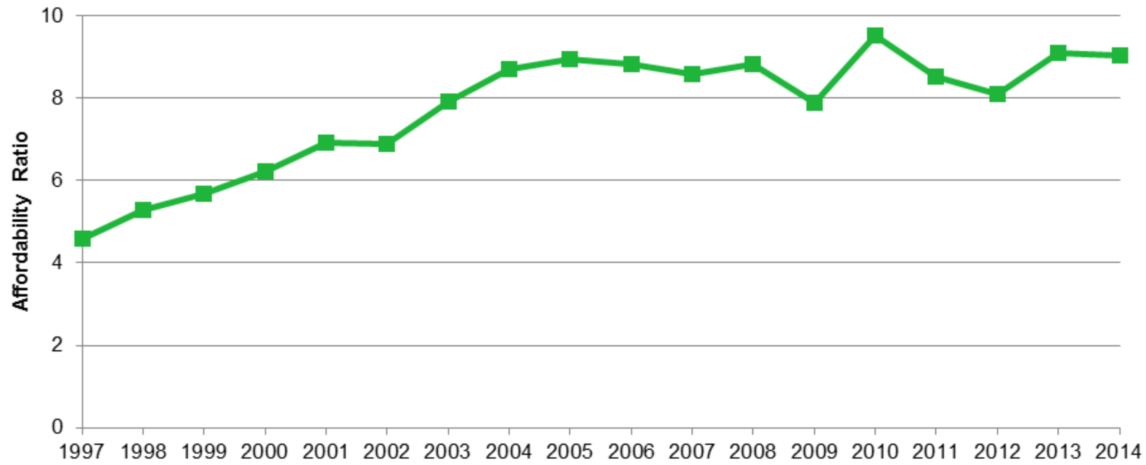


Affordability

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. Figure 3 shows that since 1997 the affordability ratio in Reigate & Banstead has increased from 4.58 to 9.03. This was exacerbated due to rapid house price growth in the middle 2000s and in recent years has stabilised, initially due to the strong employment market and more recently from smaller increases in house prices.

Within the last twelve months affordability has slightly improved from 9.10 to 9.03, this is due to increased wages and a more modest increase in prices compared to the previous year.

Figure 3 Affordability Ratio Comparison 2002 – 2014

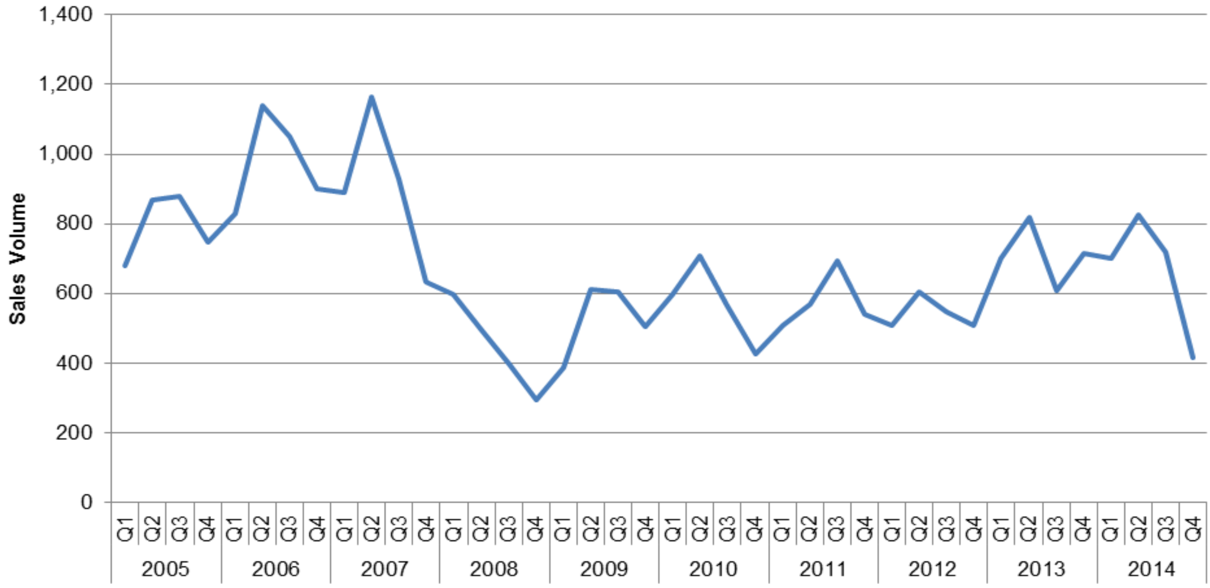


Transaction Volumes

Figure 4 shows that the annual transaction volume has fluctuated since 2005; it shows a much higher rate between 2005 and 2007 and the lowest number recorded in quarter 4 of 2008.

Within the last twelve months there has been a 7% decline in the number of transactions, from 2,846 to 2,661. Reflecting national trends, there was a noticeable decline in the number of transactions from quarter 3 to quarter 4 in 2014 (719 to 414); however, this is a common seasonal trend.

Figure 4 Quarterly Sales Volume Trend 2005 – 2015



Summary of Housing Delivery

Figure 5 Summary of Housing Completions

1 April 2013 to 31 March 2014		Area 1 - Banstead Small Sites	Area 1 - Banstead Large Sites	Area 2a - Redhill Small Sites	Area 2a - Redhill Large Sites	Area 2b - Reigate Small Sites	Area 2b - Reigate Large Sites	Area 3 - Horley Small sites	Area 3 - Horley Large Sites	Total
Completions	New Build	45	34	3	55	35	25	13	206	416
	Change of Use	1	0	12	0	20	0	1	0	34
	Conversions	0	0	2	0	1	0	0	0	3
	Total Completions	**46**	**34**	**17**	**55**	**56**	**25**	**14**	**206**	**453**
Losses	Demolitions	13	2	1	10	1	1	1	1	30
	Changes of Use	0	0	2	0	0	0	0	0	2
	No. of Units Before Conversion	0	0	1	0	0	0	0	0	1
	Total Losses	**13**	**2**	**4**	**10**	**1**	**1**	**1**	**1**	**33**
Total Net Gain		**33**	**32**	**13**	**45**	**55**	**24**	**13**	**205**	**420**

1 April 2012 to 31 March 2015 (Plan Period)	Area 1- Banstead	Area 2a – Redhill	Area 2b – Reigate	Area 3 - Horley	Total
Large Site Gross Completions	197	205	101	544	901
Large Site Losses	24	12	3	5	31
Large Site Net Gain	173	193	98	539	**870**
Small Site Gross Completions	157	89	96	34	267
Small Site Losses	31	12	13	1	41
Small Site Net Gain	126	77	83	33	**226**
Gross Completions	354	294	197	578	1,168
Losses	55	24	16	6	72
Total Net Gain	**299**	**270**	**181**	**572**	**1,096**

Delivery Trends

Overall Completion Rates in the last 5 years (2010-2015)

Net completions for 2014-2015 stood at 420, this is a slight decrease from 433 completed in 2014-2015. Figure 6 shows a general decline in the number of completions since 2010; in particular it shows a sharp decline from 2010 to 2011, driven particularly by the economic downturn impacting on the front loading of housing development which occurred as a result of the borough's New Growth Points status.

Figure 6 Net Completion Trend 2010 – 2015

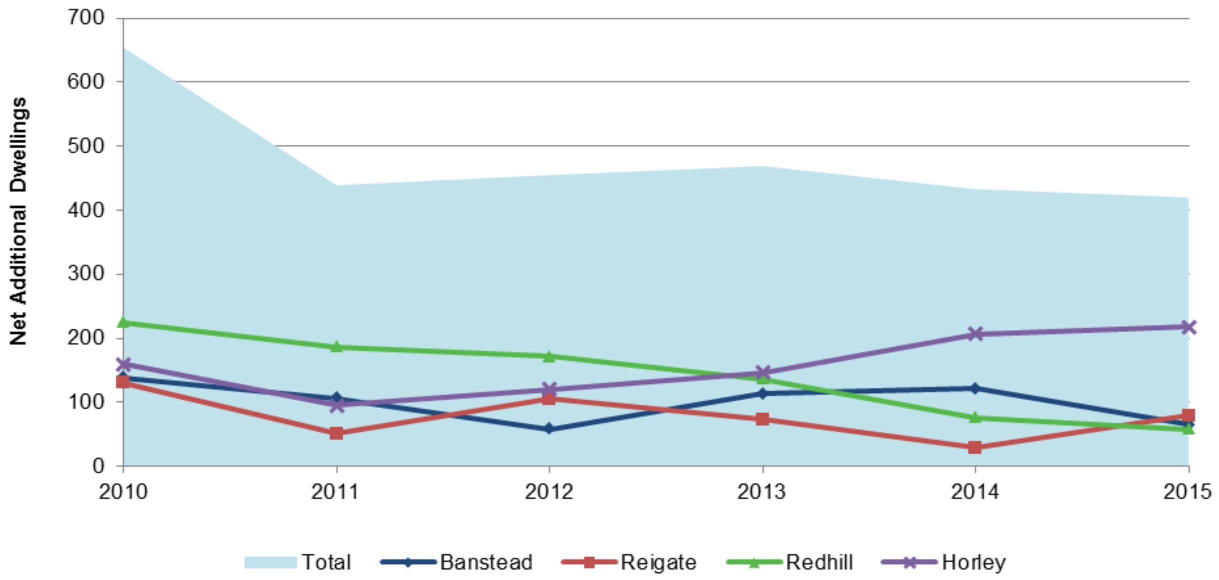
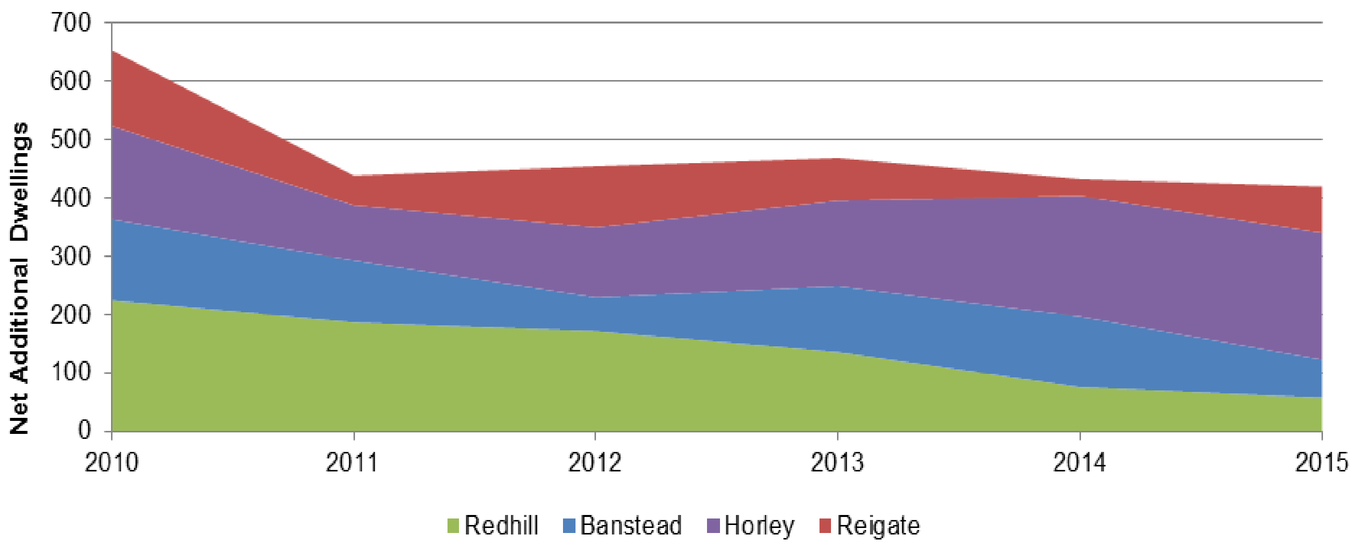


Figure 7 shows the spatial distribution of net additional dwellings since 2010; it shows that the majority of the net additional dwellings have been completed within Horley (Area 3) and Redhill (Area 2a) (33% and 30% respectively).

Within the last twelve months, Horley once again had the largest proportion of net completions (52%) predominantly due to the continued development of the North East Sector. This is followed by Reigate (Area 2b) with 19% of completions, Banstead (Area 1) with 16% and Redhill (Area 2a) with 14%.

Figure 7 Area Contribution to Total Net Completions 2010 – 2015

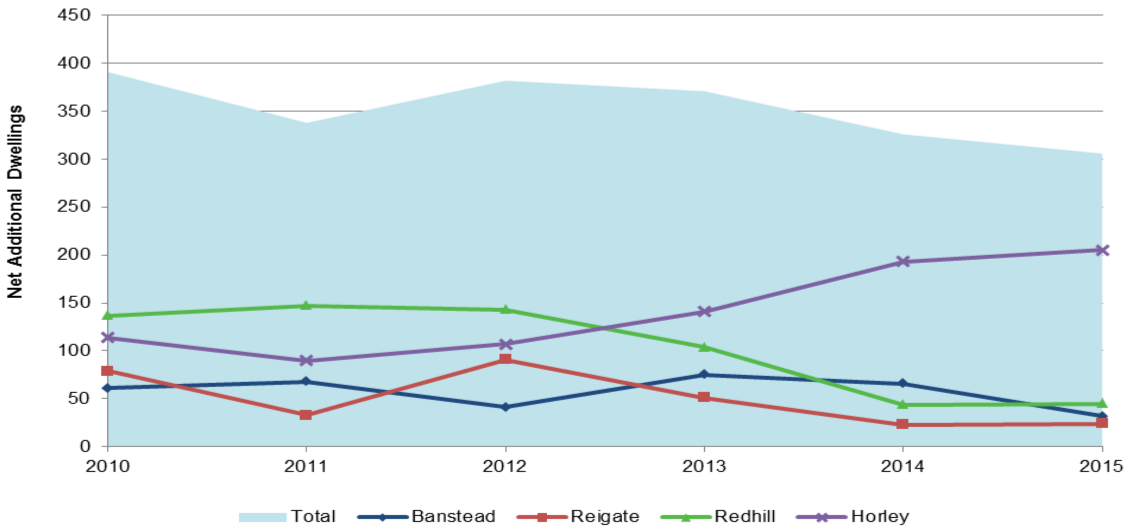


Large Site Completion Rates

Figure 8 shows that since 2010, despite fluctuation in the number of dwellings completed on sites of over 10 units, there has been a general decline in large site completions over the past few years. Within the last twelve months this decline has continued; in 2014-2015 73% of completions were on large sites, this compares to 75% in 2013-2014.

Within the last twelve months there has been some change to the net completions across the borough's four areas: Banstead (Area 1) has seen the greatest decline (52%) and Horley (Area 3) has continued to see the largest increase predominantly due to completions in the North East Sector (6%).

Figure 8 Large Site Net Completion Trend 2010 – 2015

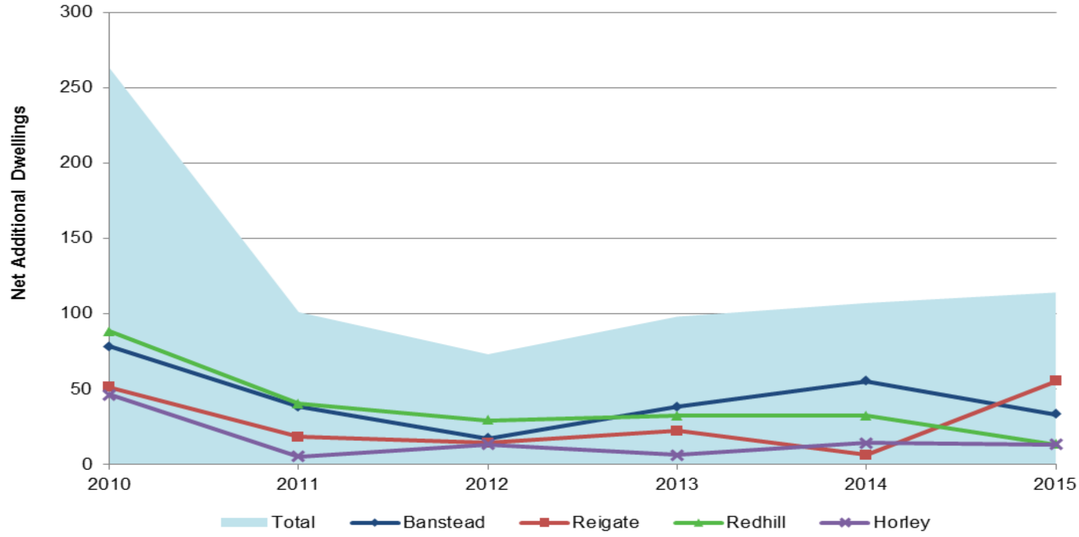


Small Site Completion Rates

Figure 9 shows that overall since 2010 there has been a significant decline in the number of completed dwellings on small sites. Of particular note is the sharp decline between 2010 and 2011 which illustrates the reaction of smaller developers to the downturn. This is followed by a gradual increase from 2012 and 2015.

Within the last twelve months, there was a slight increase in the number of completed units on small sites (from 107 in 2013-2014 to 114 in 2014-2015). Figure 9 shows that this overall increase was driven by Reigate (Area 2b) which was the only area to see an increase in the number of completed dwellings on small sites.

Figure 9 Small Site Net Completion Trend 2010 – 2015



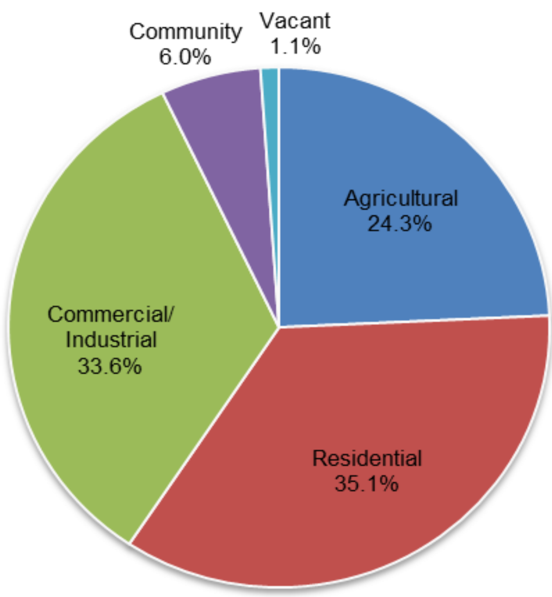
Completion Characteristics

Sources of Supply – Previous Land Use (PDL)

Figure 10 shows that the majority of the completions on previously developed land were either on previously residential land (35%) or commercial and industrial land (34%). Developments on previously residential land typically include replacement dwellings, dwelling and plot subdivisions and infill or back land development.

Within the last twelve months there has been an increase in the number of completions on previous community land (1% to 6%) due to the completion of 12 flats on the former Church Hall on Yorke Road, Reigate; and a decrease in the number of completions on previously agricultural land (42% to 24%) predominantly due to fewer units being completed in the Horley North East Sector as the development nears completion.

Figure 10 Previous Land Use of Completed Dwellings



The Council's Core Strategy Policy CS10 prioritises the use of previously developed land in order to promote the efficient and sustainable use of land. Within 2015, 69% of dwellings were completed on previously developed land; this is above the 50% target set in Core Strategy Policy CS10. Figure 11 shows that within the last twelve months there has been a significant increase in the number of units completed on previously developed land (47% to 69%). This is due to the Horley North East sector representing a smaller proportion of total completions within 2014-2015 than 2013-2014 (23% compared to 42%). Until the Horley North East and North West developments are completed the overall percentage of completions on previously developed land will be significantly lower than pre-2010.

Figure 11 Previously Developed Land

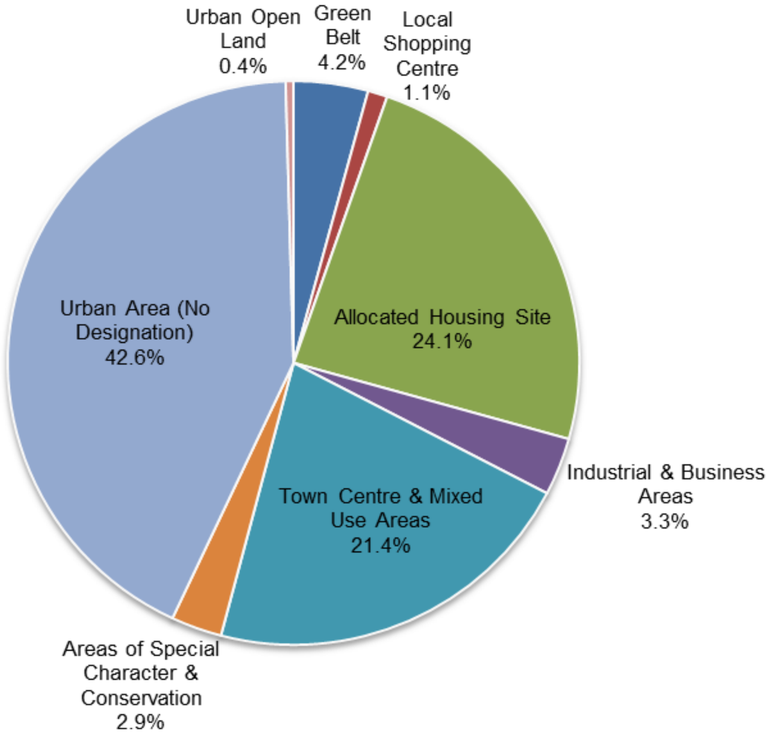
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Dwellings on PDL	394	429	627	617	614	836	632	425	381	408	216	312
% on PDL	96.7	87.6	99.4	98.9	99.4	99.9	83.9	87.1	77.4	80.3	46.7	68.9

Sources of Supply – Designation

Figure 12 shows that within the last twelve months, the majority of completed dwellings are on urban sites without any specific designation (43%), allocated housing sites (24%) or mixed use areas (21%).

Over the last year there has been an increase in the number of completed units within the town centre and mixed use areas (0.4% to 21.4%), this is predominantly due to the completion of 90 units on the former Newman House site in Horley. There has also been a decline in the proportion built on allocated housing sites (41.8% to 24.1%) due to fewer units being completed in the Horley North East Sector (193 to 109).

Figure 12 Designation of Completed Housing Sites



Housing Density

Permitted housing density is affected by factors such as the location of the site, the character of the surrounding area and the size and shape of the site. Policy CS10 of the recently adopted Core Strategy states that all development should reflect local character and levels of accessibility. The detailed local approach to housing density will be set out in the Development Management Policies DPD.

Figure 13 shows that within the last twelve months the majority of completions were on sites with a density of less than 40dph (56%). However, within the last twelve months there has been a reduction in the number of completed dwellings on sites with a density of less than 40dph predominantly due to fewer completions in the Horley North East Sector.

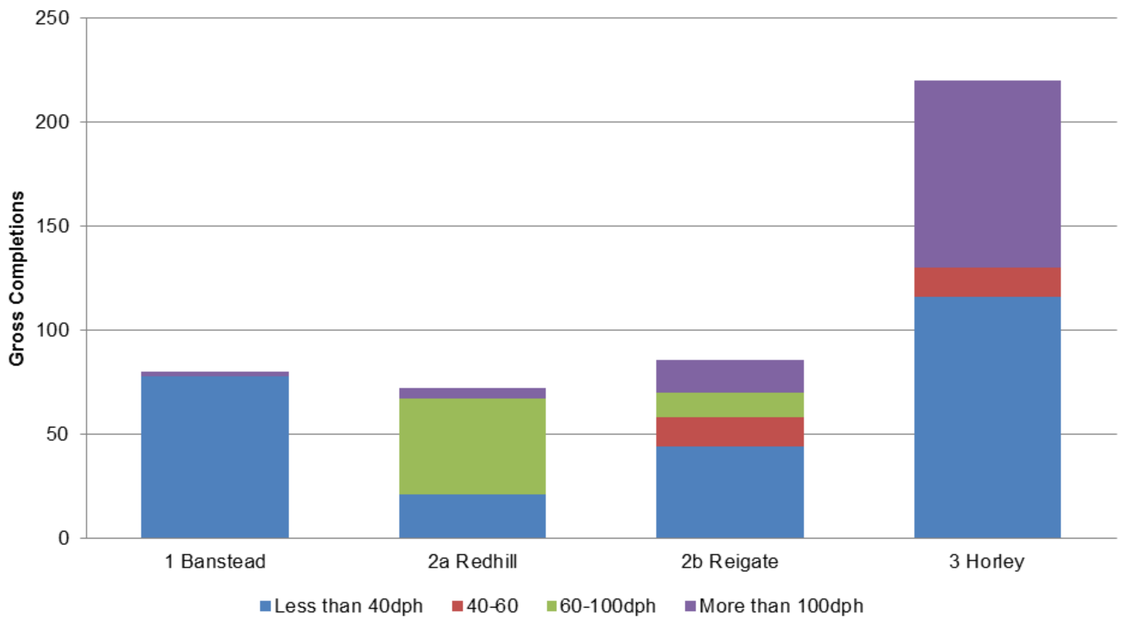
Conversely, within the last twelve months there has been an increase in the number of dwellings completed on sites with a density of more than 100dph predominantly due to the completion of 90 units on the former Newman House site (a site with a density of 136.7dph).

Figure 13 Density of Completions 2014-2015

	Less than 40dph	40-60dph	60-100dph	More than 100dph
Number of Units	254	28	58	113
Percentage (%)	56.1%	6.2%	12.8%	24.9%

Figure14 shows that the density of completions varies by borough area. It shows that Banstead, Reigate and Horley have the majority of completions on sites with a density of less than 40dph; whilst Redhill has the majority of its completions on sites with a density of between 60-100dph. It also shows that Horley has a large number of completions on sites with a density of more than 100dph (due to the completion of 90 units on the former Newman House site).

Figure 14 Density of Completions by Borough Area



Dwelling Size & Type

Figure 15 shows that within the last twelve months there has been an increase in the number of completed flats (179 to 207) and a decline in the number of completed houses (283 to 246). Both remain below the peak levels completed in 2009.

Figure 15 Breakdown by Dwelling Type

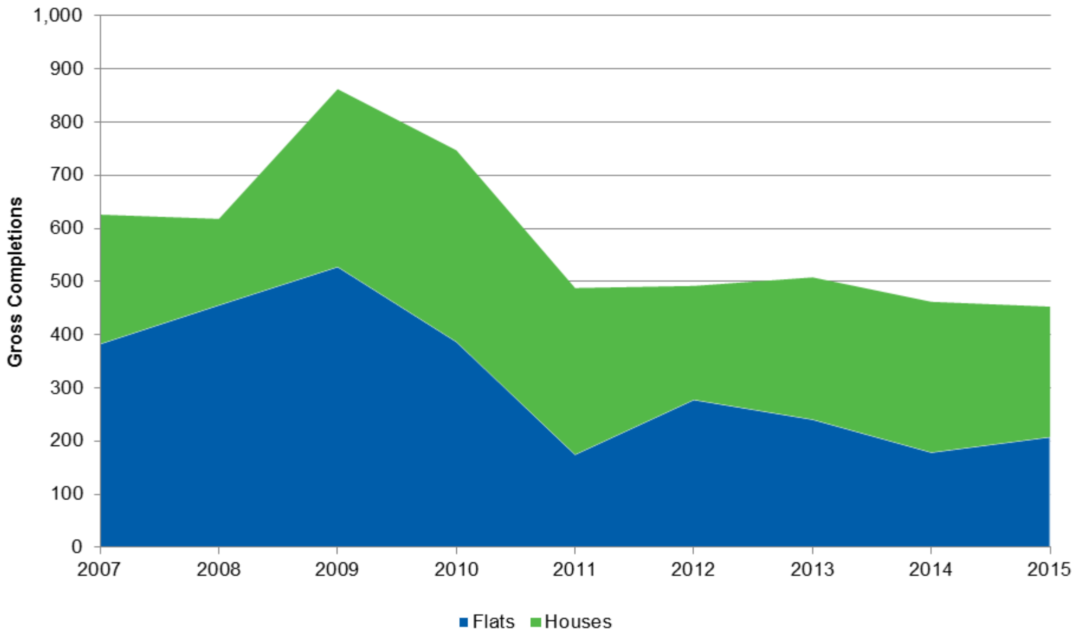


Figure 16 shows that the split between completed flats and houses varies by borough area; in particular it shows that Banstead has a significantly greater proportion of house completions than flats (87% compared to 13%) whilst Redhill has a significantly greater proportion of flat completions than houses (86% compared to 14%).

Figure 16 Proportion of Houses & Flats by Borough Area

	Flats	Houses
Area 1 – Banstead	10 (13%)	70 (87%)
Area 2a – Redhill	62 (86%)	10 (14%)
Area 2b - Reigate	40 (49%)	41 (51%)
Area 3 - Horley	95 (43%)	125 (57%)

Within the last twelve months Redhill and Horley have seen significant increases in the proportion of completed flats (from 61% to 86% and from 34% to 43% respectively) due to large scale developments such as the completion of 27 flats on the Watercolour development in Redhill and the completion of 90 flats on the former Newman House site in Horley. Conversely, Reigate has seen a significant increase in the proportion of completed houses (32% to 51%) due to an increased number of completed small scale developments such as the completion of 9 units on the former Dell building (46 Reigate Hill).

Figure 17 compares the mix of completions to SHMA 2012 Market Housing Recommendation; it shows that completions again under delivered in terms of larger 3 and 4+ dwellings and over delivered on smaller 1 and 2 bedroomed properties.

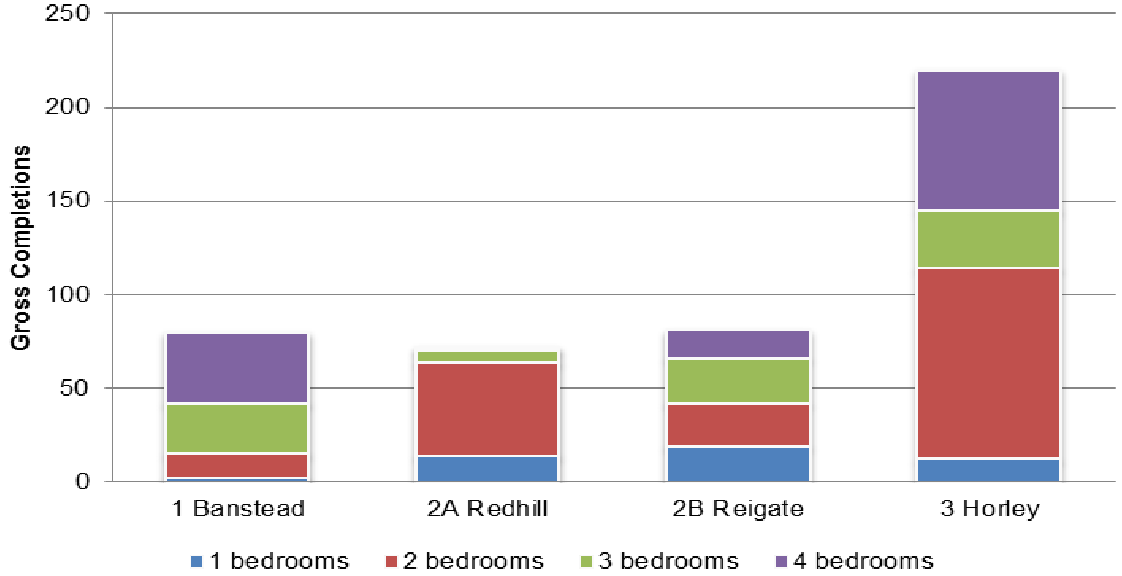
Within the last twelve months there has been an increase in the number of 1 and 2 bedroom completions (45% to 52%) and a decline in the number of 3 and 4 bedroom completions (55% compared to 48%).

Figure 17 Completions by Size Compared to SHMA Recommendations

	Completions 2014	SHMA 2012 Market Housing Recommendation
1 bedroom	10%	40%
2 bedrooms	42%	
3 bedrooms	19%	60%
4+ bedrooms	29%	

Figure 18 shows variation in the completed dwelling size across the four areas. Specifically, it shows that there are a greater number of completed 1 and 2 bedroomed properties in Redhill and Horley and a greater number of 3 and 4+ bedroomed properties in Banstead and Horley. This trend has remained from last year.

Figure 18 Completed Dwelling Size by Borough Area



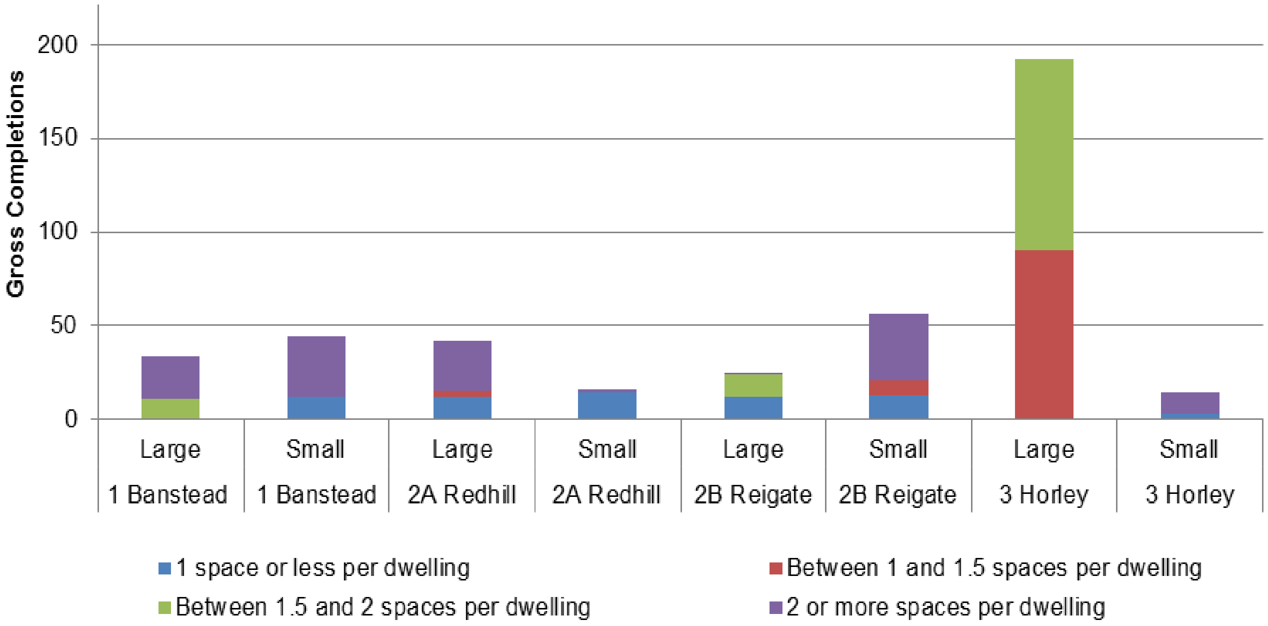
Car Parking Standards

Within this monitoring period the average number of parking spaces per completed dwelling has increased from 1.54 to 1.60.

Parking space provision varies depending upon the location and level of accessibility of the site, for example figure 19 shows that Redhill and Reigate (Areas 2a and 2b) with good proximity to services and transport links, have a larger number of completions with one space or less.

Within the last twelve months the proportion of completed dwellings with between 1.5 and 2 parking spaces has fallen from 70% to 36%; whilst the proportion of completed dwellings with between 1 and 1.5 spaces has increased from 9% to 30%.

Figure 19 Average Parking Spaces on Completed Dwellings by Site Size



Affordable Housing

Figure 20 shows that within the last twelve months 129 gross affordable housing units were completed. This equates to 29% of all gross completions, an increase from 22% recorded in the previous monitor. However, the number of social rented completions has fallen from 44 to 30 (9.5% to 6.6% of total gross completions).

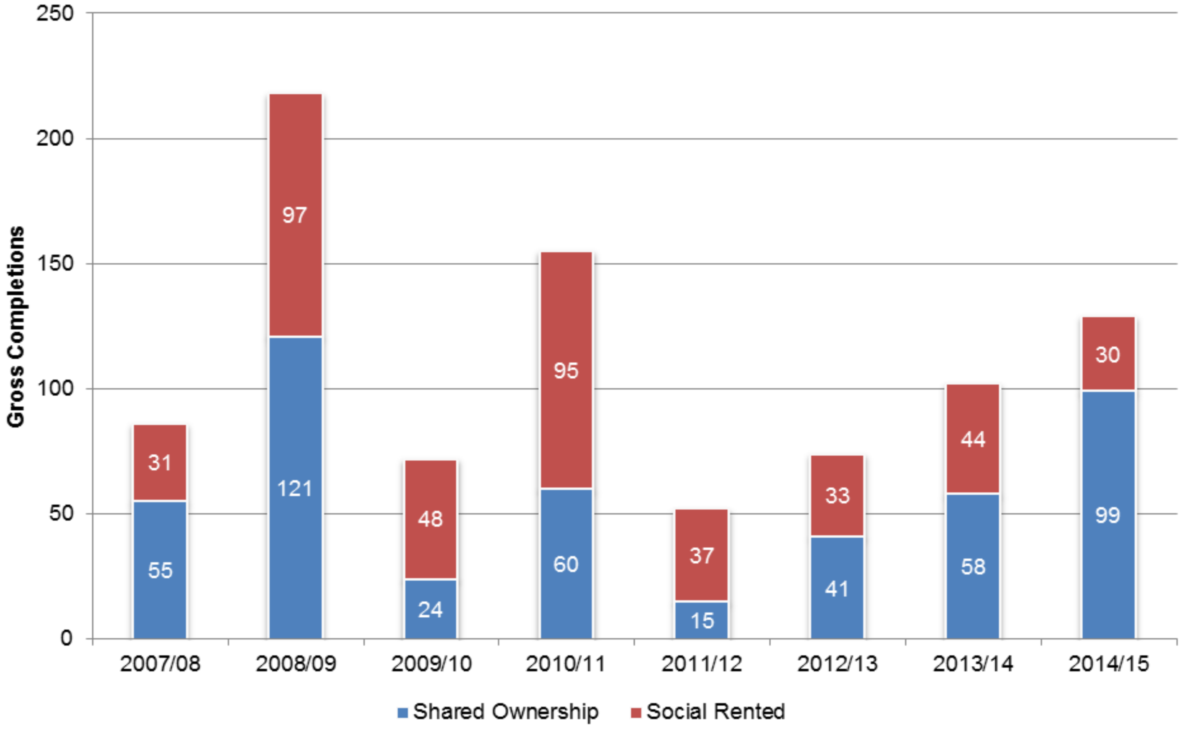
The majority of the completed affordable housing units were on the former Newman House site in Horley (70%).

Figure 20 Affordable Housing Completions Summary

	Gross Completions
Total Units Completed 2014/15	453
Affordable Completions	129
Affordable (%)	**28.5%**
Social Rented	30
Social Rented (%)	**6.6%**

Figure 21 shows that there has been an increase in the number of completed affordable units since 2011/2012, but shows that levels remain below the peak reached in 2008/2009.

Figure 21 Affordable Housing Completions Trend



New Permission Characteristics

Number of New Permissions

As can be seen from figure 22, within 2014-2015, 130 planning applications were granted permission for a potential 1,967 net additional dwellings. Of these 1,967 net additional dwellings, 1,510 were granted as part of the Horley North West sector development. This is more than the total number permitted within 2013-2014.

Once again the majority of new permissions (net) were on large sites (85% compared to 75% in 2013-2014).

Figure 22 Number of New Units Permitted

		Area 1 - Banstead	Area 2a - Redhill	Area 2b - Reigate	Area 3 - Horley	TOTAL
Large (10+ units)	Gross	10	39	95	1,607	**1,751**
	Net	9	37	86	1,607	**1,739**
Small (1-9 units)	Gross	142	60	73	37	**312**
	Net	100	48	52	28	**228**
All Sites	Gross	**152**	**99**	**168**	**1,644**	**2,063**
	Net	**109**	**85**	**138**	**1,635**	**1,967**

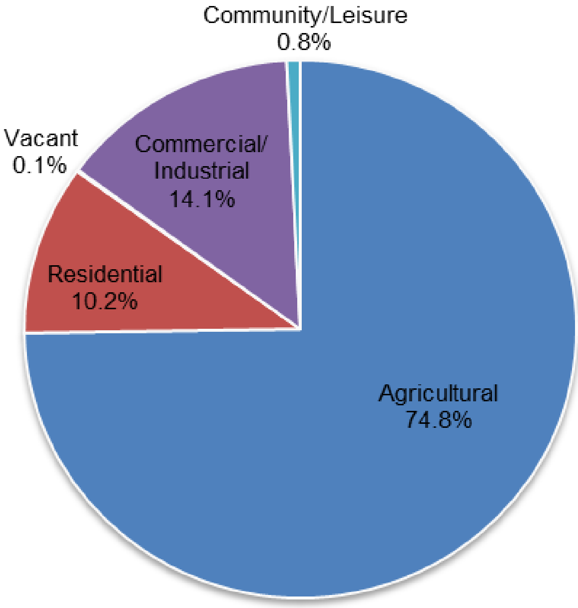
Source of New Permissions – Previous Land Use

Figure 23 demonstrates that the majority of new homes granted within 2014-2015 were on sites currently in agricultural use: this is due to planning permission being granted for 1,510 dwellings on agricultural land as part of the Horley North West development. This has led to the proportion of planning applications on agricultural land within the last twelve months increasing from 25% to 75%.

The last twelve months has seen a fall in the number of dwellings permitted on previously commercial/ industrial land from 493 to 286. This is partially due to permission being granted in the previous monitor for 150 dwellings on Redhill Railway Station and partially due to a greater number of larger permitted office to residential schemes, such as 38 dwellings permitted for Consort House Horley.

Within the last twelve months there has also ben a fall in the number of dwellings permitted on previously community land (from 191 to 17). This is predominantly due to planning permission being granted in the previous monitoring period for 130 dwellings as part of the regeneration works at Merland Rise and Purbeck Close.

Figure 23 Previous Land Use of New Permissions

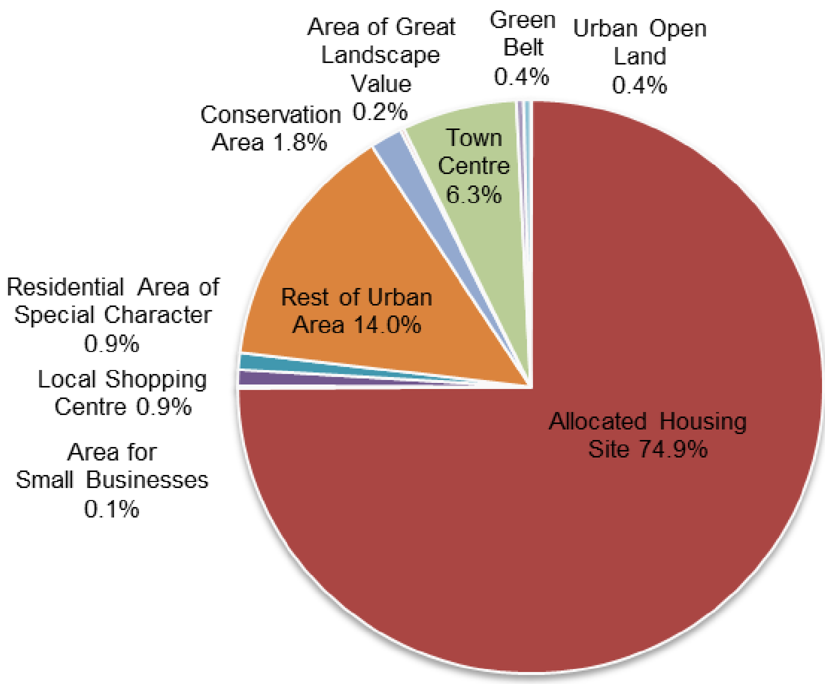


Source of New Permissions – Designation

75% of planning permissions granted within the last twelve months are for allocated housing sites; again this is due to planning permission granted for 1,510 dwellings as part of the Horley North West sector development.

Within this monitoring period there has been a fall in the number of permitted dwellings in the rest of the urban area (463 to 282) and town centres (227 to 128). These falls are due to a number of large scale permissions, such as for 130 dwellings on the Recreation Ground in Tadworth (rest of the urban area) and 150 dwellings on Redhill Railway Station, permitted within the previous twelve months.

Figure 24 Designation of New Permissions



Housing Density

Permitted housing density is affected by factors such as the location of the site, the character of the surrounding area and the size and shape of the site. Once again within the last twelve months, the majority of permitted dwellings are for sites with a density of less than 40dph.

Figure 25 Density of New Permissions

	Less than 40dph	40-60dph	60-100dph	More than 100dph
Number of Units	1,752	38	104	169
Percentage (%)	84.9%	1.8%	5.0%	8.2%

Dwelling Type & Size

Figure 26 shows the size and type of newly permitted dwellings within the last twelve months, it excludes the 1,510 dwellings permitted for the Horley North West sector development as no details have yet been provided as the approval was only outline.

The majority of permissions granted within the last twelve months were for either 1 or 2 bedroomed properties (69%). This is a slight increase from 66% recorded within the previous year. Specifically, within the last twelve months there has been an increase in the number of one bedroomed properties permitted (from 21% to 31%). This increase is predominantly due to an increase in the percentage of one bedroomed properties permitted under temporary permitted development rights allowing the conversion of office accommodation to residential accommodation (from 41% in 2013-2014 to 51% in 2014-2015).

Figure 26 Size & Type of Newly Permitted Dwellings

	Flats	Houses	Total
1 bedroom	171	3	174 (31%)
2 bedrooms	193	19	212 (38%)
3 bedrooms	8	50	58 (11%)
4+ bedrooms	1	108	109 (20%)
Total	373(67.5%)	180(32.5%)	553

Figure 27 shows that there is a notable variation in type of dwelling permitted by borough area, in particular it shows a greater proportion of flats permitted in Redhill, Reigate and Horley than houses.

Figure 27 Proportion of Newly Permitted Houses and Flats by Borough Area

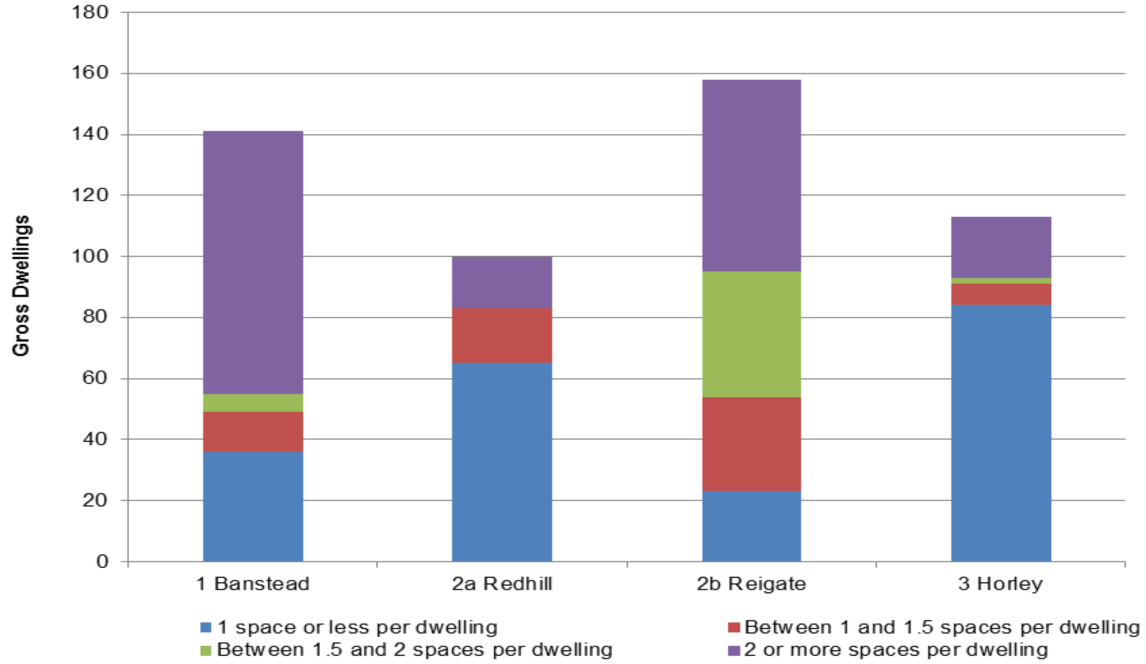
	Flats	Houses
Area 1 – Banstead	41 (28%)	107 (72%)
Area 2a – Redhill	89 (86%)	14 (14%)
Area 2b - Reigate	136 (82%)	30 (18%)
Area 3 - Horley	107 (79%)	29 (21%)

Car Parking Standards

The level of parking provision per dwelling varies across the borough depending upon factors such as location, levels of access to amenities and accessibility to public transport. Excluding the 1,510 dwellings permitted for the Horley North West Sector, within the last twelve months the average number of parking spaces for new permissions was 1.52.

Figure 28 shows that once again Banstead has the greatest number of parking spaces permitted per dwelling. Within the last year there has been an increased number of dwellings permitted with one space or less within Horley due to an increased number of temporary development rights permitted within the town centre with no parking spaces, for example Oakfield Court, Consort Way.

Figure 28 Parking Spaces on Newly Permitted Dwellings by Area



Housing Supply & Delivery Position

Plan Period Performance

Within the recently adopted Core Strategy, Policy CS13 plans for at least 6,900 dwellings to be completed between 2012 and 2027. This equates to an annual average provision of 460 homes per year.

Figure 29 summarises progress made against the Core Strategy housing requirement; it shows that since 2012 1,322 net additional dwellings were completed within the borough. This equates to an annual average completion of 441 units against the Core Strategy target of 460.

Within the last twelve months 420 net dwellings were completed, this is a slight under provision against the 460 annual requirement. This leaves an outstanding requirement of 5,578 additional dwellings over the next twelve years.

Figure 29 Performance against Core Strategy – 2012 to 2027

Housing requirement	Net completions to date	Average per year	Completed	Residual
6,900	1,322	441	19.2%	5,578

Five Year Land Supply Position

This section sets out the five year deliverable housing land supply position in Reigate & Banstead (1st April 2015 to 31st March 2020). 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 2014 Strategic Housing Land Availability Assessment, evidence submitted and tested at the additional Core Strategy examination session in December 2013 and on-going analysis of identified sites.

Five Year Housing Requirement

The Council bases its assessment of five year land supply on figures provided in the Core Strategy Policy CS13 which plans for an additional 6,900 dwellings to be completed in the borough between 2012 and 2027, the equivalent of 460 dwellings per annum.

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. Since 2006, both cumulatively and in the majority of years, housing delivery has exceeded targets. The 5% buffer is therefore applicable to Reigate and Banstead.

Over the past three years the Council under delivered by 58 units, this will be factored into the next 5 years in order to meet the housing requirement set out in Policy CS13.

Therefore, the overall five year requirement is 2,300 units with an additional buffer of 115 units. In the last three years there was an undersupply of 58 units. This equates to an annual requirement of 495. 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 (NPPF), 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 NPFF, sites with planning permission should be considered deliverable unless there is evidence that they will not be implemented within five years.

As of 1st April 2015, there are a total of 1,515 outstanding net additional dwellings on sites with planning permission. A total of 58 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). Notwithstanding the provisions in the Planning Practice Guidance, a further 170 units for older people have also been excluded as they are to be provided in residential institutions (Use Class C2). **Therefore, total capacity from sites with planning permission in the five year supply is 1,515 net additional dwellings.** Of these units 604 are on sites which are currently under construction and the remaining 911 are on sites which have yet to be implemented (tables A and B of the Appendix provides more detail).

Within the last twelve months planning permission has also been approved for the construction of 1,510 dwellings as part of the Horley North West development, it is expected that within the next five years 572 of these dwellings will be completed.

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 2020 taking account of any phasing plans) is **552 net additional dwellings.**

All of these sites have been assessed for suitability 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 sites 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."*

Within Reigate and Banstead it is widely recognised that Windfalls and small sites make a significant contribution to housing supply. Since 2005 annual rates of permissions for windfalls have been largely consistent, regularly exceeding 300 additional dwellings per annum. Tracking these permissions indicates that windfalls experience high implementation levels.

Assessment of a robust windfall allowance has been undertaken through the 2014 SHLAA and detailed analysis can be found in Appendix 5 of the 2014 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 110 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 **2,889 net additional dwellings.** This represents a 5.84 years supply against the Core Strategy requirement and NPPF 5% buffer.

Figure 30 Summary of Five Year Land Supply

Source		
1)	Sites with planning permission (Excl. Horley North West)	1,515
2)	Sites without planning permission	552
3)	Horley North West Sector	572
4)	Specific Deliverable Sites (1+2+3)	2,639
5)	Windfall allowance	250
6)	**Total Capacity (4+5)**	**2,889**
7)	Core Strategy Annual Requirement	460
8)	5% Buffer	23
9)	Annualise over/under supply	12
10)	Total annual requirement (7+8+9)	495
	Years Supply	**5.84(years)**

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 (5+ Units) with Planning Permission in the Five Year Supply

Application Reference	Site Address	Ward	Implementation Status @ 1 April 2015	Gross Dwellings Permitted	Net Dwellings Permitted	Units completed @ 31 March 2015	Total net remaining @ 1 April 2015	Net Deliverable by 31 March 2020
13/00667/F	Blue Haze, Outwood Lane, Chipstead	CHW	Under Construction	14	13	0	13	13
12/02102/F	Red House School, Kingswood Park, Tadworth	KBH	Under Construction	14	11	0	11	11
12/01988/F	Former Kingswood Mitsubishi, 3-4 Waterhouse Lane, Kingswood	KBH	Under Construction	14	14	1	13	13
13/01629/F	Kingsworthy House, The Glade, Kingswood	KBH	Under Construction	8	7	0	7	7
13/00202/F	303-309 Fir Tree Road, Epsom Downs	N	Under Construction	8	7	0	7	7
13/00846/F	L/A Longfield Crescent, Tadworth	P	Under Construction	16	16	0	16	16
13/01338/F	White Lodge, 50 Tadworth Street, Tadworth	TW	Under Construction	11	11	0	11	11
14/00935/F	The Cadet Association, 2 Hooley Lane, Redhill	RE	Under Construction	11	11	0	11	11
10/01423/F	Woodlands Court, 23 Woodlands Road	EW	Under Construction	18	14	0	14	14
13/02147/OUT	Darby House, 162 Bletchingley Road, Merstham	M	Under Construction	20	20	0	20	20
13/01500/F	Land Parcel One, Purbeck Close, Merstham	M	Under Construction	40	6	13	-7	-7
13/02169/F	14 Brighton Road, Banstead	N	Under Construction	9	8	0	8	8
12/00379/F	Doran Gardens, Doran Drive, Redhill	RC	Under Construction	6	6	0	6	6
13/00420/F	Liquid & Envy, Redhill	RE	Under Construction	61	61	0	61	61
04/02411/F	L/A Former Holmethorpe Quarry (Watercolour)	RE	Under Construction	551	550	538	12	12
13/01866/F	64 Garlands Road, Redhill	RE	Under Construction	5	4	0	4	4
14/00081/P3JPA	Fileturn House, 44 Reigate Hill, Reigate	RH	Under Construction	6	6	0	6	6
13/00447/F	48 Croydon Road, Reigate	RH	Under Construction	8	8	0	8	8
13/02031/P3JPA	Surrey Mirror, Trinity House, 51 Reigate Road, Reigate	RH	Under Construction	18	18	0	18	18
12/02030/F	Colne House, Linkfield Lane, Redhill	RW	Under Construction	19	17	0	17	17
13/01578/F	Former Crown Buildings, 73-75 London Road	RW	Under Construction	14	14	0	14	14

12/01989/F	9 Dovers Green Road, Reigate	SPW	Under Construction	12	12	1	11	11
14/02646/P3JPA	Beulah Court, 15 - 19 Albert Road, Horley	HC	Under Construction	33	33	0	33	33
13/01421/OUT	Longwood, 121 Smallfield Road, Horley	HE	Under Construction	36	35	0	35	35
04/01778/OUT	L/A Langshott & Lake Lane (Horley NE Sector)	HE	Under Construction	718	718	654	64	64
13/00504/F	Rosemary Court, Court Lodge Road, Horley	HW	Under Construction	30	20	14	6	6
14/00935/F	19-23 Woodhatch Road, Redhill	RE	Under Construction	11	11	0	11	11
14/01307/F	337 Reigate Road, Epsom Downs, Surrey	N	Not Implemented	10	9	0	9	9
13/01729/OUT	Recreation Ground, Merland Rise, Preston	P	Not Implemented	130	130	0	130	130
13/01366/F	The Royal Phoenix, 84 Dorking Road, Tadworth	TW	Not Implemented	11	10	0	10	10
13/01838/F	19 Woodhatch Road, Redhill	EW	Not Implemented	18	16	0	16	16
13/02289/OUT	Portland Drive, Merstham	M	Not Implemented	48	6	0	6	6
14/00801/F	Site of the former Iron Horse Public House, 27A Bletchingley Road, Merstham	M	Not Implemented	10	10	0	10	10
13/00848/F	Redhill Railway Station, Princess Way, Redhill	RE	Not Implemented	150	150	0	150	150
12/01813/F	Redstone Hall, 10 Redstone Hill, Redhill	RE	Not Implemented	11	11	0	11	11
13/00802/F	The Frenches Club, The Frenches, Redhill	RE	Not Implemented	11	11	0	11	11
14/01076/F	Chatham Court, Lesbourne Road, Reigate	RC	Not Implemented	38	38	0	38	38
13/01938/F	Reigate Business Mews, 38 Albert Road North, Reigate	RC	Not Implemented	14	14	0	14	14
14/02669/P3JPA	Liberty House, 105 Bell Street, Reigate	RE	Not Implemented	24	24	0	24	24
13/01912/P3JPA	Imperial Buildings, 68 Victoria Road, Horley	HC	Not Implemented	13	13	0	13	13
13/02294/P3JPA	Second Floor, 100 Victoria Road, Horley	HC	Not Implemented	12	12	0	12	12
14/02647/P3JPA	Consort House, Consort Way, Horley	HC	Not Implemented	38	38	0	38	38
14/01570/P3JPA	Oakfield Court, Consort Way, Horley	HC	Not Implemented	21	21	0	21	21
14/00317/F	Saxley Court, 121-129 Victoria Road, Horley	HC	Not Implemented	43	43	0	43	43
12/01973/OUT	Land at Haroldslea Drive, Horley	HE	Not Implemented	50	50	0	50	50
12/01940/F	Amherst House, 287 Court Lodge Road, Horley	HW	Not Implemented	19	19	0	19	19
14/01007/F	Burghside, Brighton Road, Banstead	BV	Not Implemented	6	6	0	6	6
14/02122/F	49, 51, 53 Yew Tree Bottom Road, Epsom Downs	N	Not Implemented	5	3	0	3	3

14/01346/F	129 Nork Way, Banstead	N	Not Implemented	8	7	0	7	7
14/00514/F	268-278 Fir Tree Road, Epsom Downs	N	Not Implemented	7	6	0	6	6
12/00355/OUT	Downs Mower Services, 1 Tattenham Grove, Banstead	TAT	Not Implemented	5	5	0	5	5
14/01084/P3JPA	Fintrax House, Station Road North, Merstham	M	Not Implemented	9	9	0	9	9
14/02247/P3JPA	23-27 Endsleigh Road, Merstham	M	Not Implemented	6	5	0	5	5
14/00763/CU	26-28 Station Road, Redhill	RE	Not Implemented	14	14	0	14	14
13/00584/F	Aspect House, 2-4 Monson Road, Redhill	RW	Not Implemented	6	6	0	6	6
14/02551/P3JPA	Rawlinson House, 7-9 London Road, Redhill	RW	Not Implemented	8	8	0	8	8
14/02371/F	Bourne House, 17 Lesbourne Road, Reigate	MSJ	Not Implemented	7	7	0	7	7
13/00300/F	Windwood, 33 Mill Street, Reigate	MSJ	Not Implemented	7	6	0	6	6
14/01188/F	White Post House, Whitepost House, Redhill	MSJ	Not Implemented	9	7	0	7	7
14/00645/OUT	88-91 West Street, Reigate	RC	Not Implemented	6	4	0	4	4
14/00498/F	Reigate Heath Garage, 10 & 11 Flanchford Road, Reigate	RC	Not Implemented	6	4	0	4	4
14/00780/P3JPA	60 Priory Road, Reigate	SPW	Not Implemented	7	7	0	7	7
13/01476/F	Yattendon School, Oakwood Road, Horley	HC	Not Implemented	7	7	0	7	7
13/01311/P3JPA	Meadowcroft House, 182 Balcombe Road, Horley	HC	Not Implemented	6	6	0	6	6
12/01182/F	Horley North East Phase 1B, Orchard Drive, Horley	HE	Not Implemented	8	8	0	8	8
13/02073/P3JPA	South Lodge Court, Ironsbottom, Sidlow	SS	Not Implemented	5	5	0	5	5
04/02120/OUT	Horley North West Sector, Meath Green Lane, Horley	HW	Not Implemented	1,510	1,510	0	1,510	572
Total Net Deliverable								**1,757**
Total Net Deliverable (Excl. Horley North West Sector)								**1,185**

Table B: Summary of Small Sites (Less than 5 Units) with Planning Permission in the Five Year Supply

Implementation Status	Borough Area	Gross Dwellings Permitted	Net Dwellings Permitted	Net Remaining @ 1 April 2014	Net Deliverable by 31 March 2019
Under Construction	Area 1 – Banstead	118	84	78	78
	Area 2a – Redhill	68	42	19	19
	Area 2b- Reigate	44	35	32	32
	Area 3 – Horley	51	45	45	45
Not Implemented	Area 1 – Banstead	106	65	65	65
	Area 2a – Redhill	44	30	30	30
	Area 2b- Reigate	55	35	35	35
	Area 3 – Horley	37	26	26	26
Total Net Deliverable					**330**

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

Site Address	Ward	Total Net Capacity	Net Deliverable in five year supply
The Croft, Horley North West Sector	HW	51	10
The Landens Farm Buildings	HW	40	40
Former Garage Site, Victoria Road, Horley	HC	60	60
Former De Burgh School, Preston	P	180	120
Former Oakley Centre, Radstock Way, Merstham	M	25	25
Library Site, Kings Road, Horley	HC	35	35
Site at Marketfield Way, Redhill	RE	85	85
Longmead Adult Education Centre, Holland Close, Redhill	RW	20	20
Chatham Court and Linden Court, Reigate	RC	38	38
RNIB Redhill College, Redhill	EW	70	70
Frith Park, Walton-on-the-Hill	TW	35	35
Chichester Caravans, Salfords	SS	14	14
Total Net Deliverable			552

Monitoring Publications

Regular Monitors:

Commercial Development

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