Commercial, Leisure & Community Commitments Monitor

Position at 31 March 2021

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

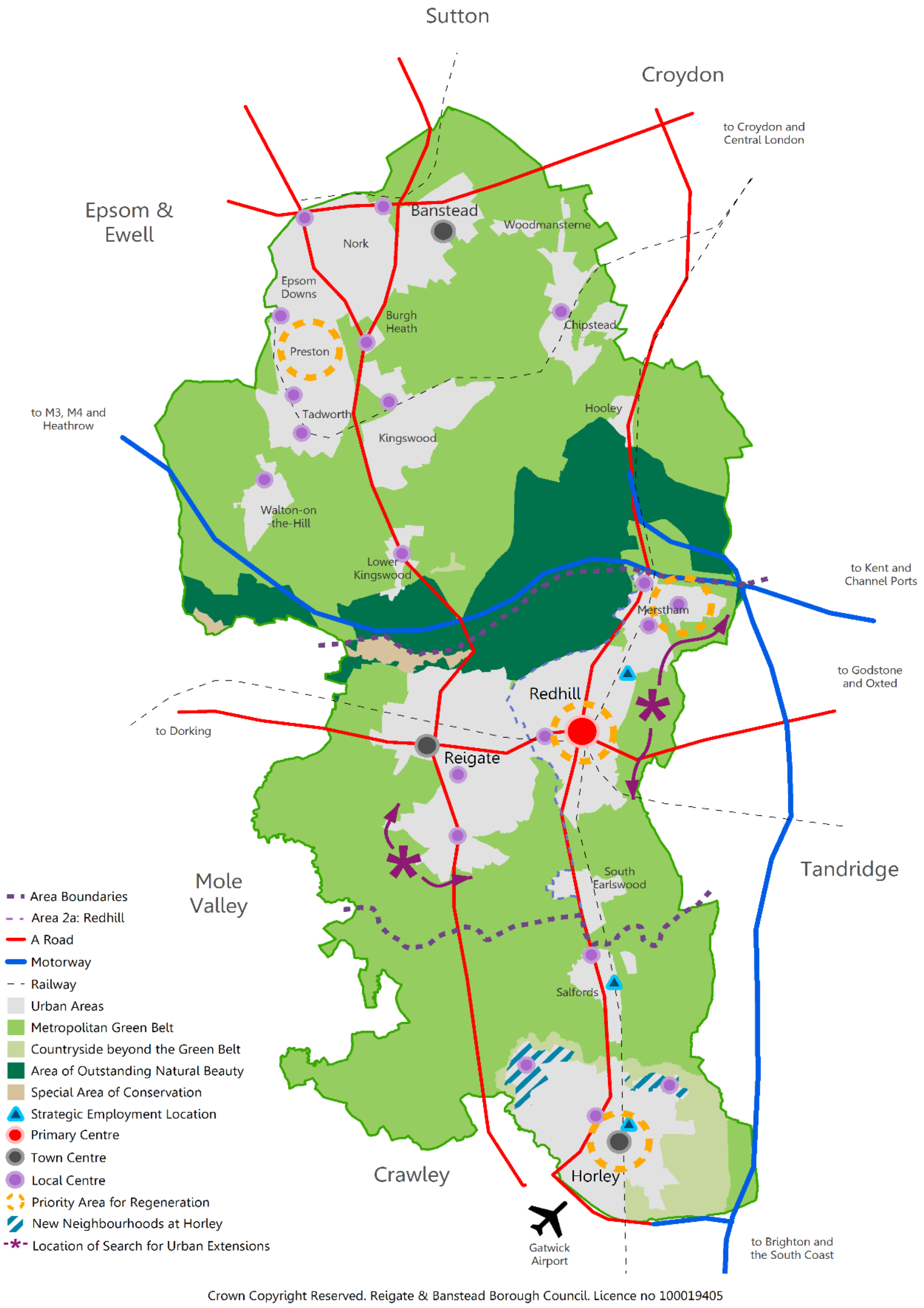

Figure 1 Reigate & Banstead Core Strategy borough map

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Please Note:

This monitor provides an update of the current amount, type and location of commercial commitments in Reigate & Banstead. 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 may be corrected. Similarly, any suggestions that would make the information more useful would be gratefully received.

1. Introduction

The beginning of the year saw the country enter another national lockdown, bringing with it a short economic downturn, albeit milder than during the first national lockdown. (Colliers Property Snapshot February 2021). The rise of the Purchasing Manager's Index (PMI) in March suggested economic activity across the UK picked up again following two months of contraction. IHS Markit also reported that businesses are optimistic about their 12-month outlook, as highlighted by the Future Output Index reaching a record high. The official unemployment rate remains low (5%) as the Job Retention Scheme continues to support employees. At the end of February, 4.7 million people were on furlough. This compares to a record of 8.9 million during the first national lockdown in Q2 2020.

Retail sales growth continues to show the impact of lockdown. After 3% year on year growth in December, volumes fell in January and February, with fashion the hardest hit. Despite weak conditions in 2020, the evidence from Q1 2021 suggest the office occupier market to be recovering. London office take-up in Q1 2021 topped 1.6 million sqft, the highest total since Q1 2020. The UK industrial property market remains pressured by the rise of e-commerce and structural change in retail distribution, aggravated by limited new Grade-a and tech enabled space. Available space remains limited across the UK with several regions seeing less than one year's worth of supply and historically low vacancy rates (Colliers Property Snapshot April 2021).

The RICS UK Commercial Property Market Survey Q2 2021 also points to an improvement in overall market sentiment, with 56% of respondents now sensing the market is in the upturn stage of the property cycle. For the upcoming twelve months, respondents continue to foresee strong industrial capital value growth across all parts of the UK. Although both prime and secondary retail values are still anticipated to see widespread declines, projections are at least less negative than in previous quarters.

This monitor provides information on the amount, type and location of commercial commitments and available commercial floorspace in the borough. Its purpose is to:

- Monitor the amount of employment and retail development coming forward in Reigate & Banstead against established targets
- Analyse the characteristics of development against the relevant policies and indicators

- Monitor the amount of employment and retail floorspace available to let across the borough as a barometer of local economic health.

For more detailed analysis of the situation in the borough's main employment and shopping areas, please refer to one of the specific monitors listed at the end of this document.

1.1. Policy Context

The Council has an up-to-date Local Plan:

The Core Strategy was formally adopted in July 2014 and was reviewed in accordance with Regulation 10A of the Town and Country Planning (Local Planning) (England) Regulations 2012 (as amended) in July 2019. The Core Strategy details how much growth will take place across the borough between 2012 and 2027 and sets out the overarching strategic approach for delivering new development in the borough.

The Development Management Plan (DMP) was formally adopted in September 2019. It contains detailed policies relating to the management of employment and retail development and allocates sites for development across the borough.

1.2. Use Class Changes

On 1st September 2020, the Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020 introduced a number of fundamental changes to the Use Classes Order. As a result, this monitor is not able to provide accurate comparison to previous monitoring period. It is no longer possible to fully distinguish between retail (former A1 – A5 use classes) and employment (former B1 – B8 use classes). For the purposes of this monitor, we will therefore assess the location of Industrial, storage & distribution development (B2 & B8 use classes) and Commercial, business & service development (E use class).

Further information is provided in Appendix 1.

1.3. Spatial Commentary

For the purposes of the monitor, the borough is divided into the four Core Strategy areas. The diagram below illustrates how the borough is split.

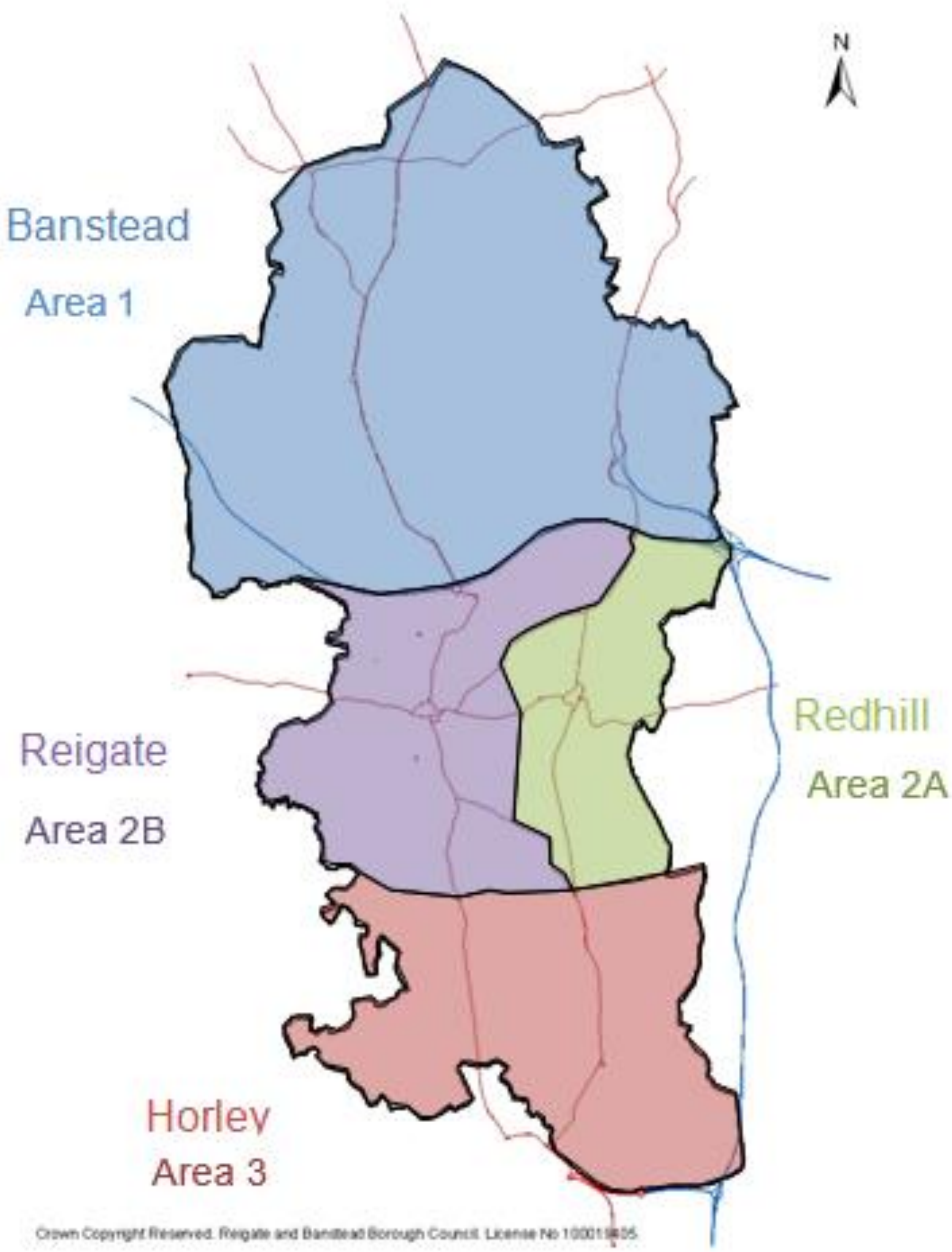

Figure 2 Reigate & Banstead four Core Strategy areas

2. Employment, Retail & Community Development Summary

2.1. Completions

Over the last twelve months 23,635sqm (gross) of new retail, employment and community floorspace has been completed in the borough. Once losses (from changes of use or redevelopment away from employment/retail/community use) are taken into account, there was overall a net gain of 5,763sqm of retail, employment and community floorspace during 2020/21. Please note that the new floorspace has been permitted under a mix of new and old use classes. For the ease of reporting, all completions have been converted to the existing Use Class Order as amended on 01 September 2020.

Table 1 below summarises the gains and losses on developments completed over the past year.

Table 1 Employment, retail & community completions

Use Class	Gain	Loss	Net
E	1,611	14,733	-13,122
B8	19,285	1,514	17,771
F.1	2,015	82	1,933
Sui Generis	724	1,543	-819
Total	**23,635**	**17,872**	**5,763**

The majority of the gross new retail, employment and community floorspace completed in this monitoring period comes from B8 storage & distribution (19,285sqm), followed by community F.1 uses (2,015sqm) and E commercial, business & service uses (3,076sqm). Notable schemes include:

- Redevelopment of the former Philips Research Laboratories site at Salfords Industrial Estate to provide 15,831sqm of new B8 floorspace (18/01180/F).
- Erection of two new commercial units at Wells Place Industrial Estate to provide 3,432sqm of new B8 floorspace (18/01072/F).

The biggest losses of retail, employment and community floorspace during this monitoring period came from E commercial, business & service uses (14,733sqm). Prior-approval office to residential conversions account for 9,285sqm of the E use class loss, including schemes at Patteson Court, Quadrant House and Furness House in Redhill as well as The Gables in Horley. The remaining 2,069sqm of E use class losses came from the residential redevelopment of the former Reigate Garden Centre. Other notable losses came from the scheme at Station Yard in Kingswood with 1,014sqm of B8 floorspace lost under the permission 16/01777/F for redevelopment of the site to residential. Residential development is currently on hold, however the demolition of existing commercial units has already taken place.

Previously Developed Land

82.8% of the gross retail, employment & community floorspace completed within the past year was on previously developed land. This is slightly below the Core Strategy Monitoring Target of 90%. Most of the additional employment floorspace build on land not previously developed (3,432sqm) came from a development of two new commercial units within the boundaries of the Wells Place Industrial Estate, as extended by the 2019 Development Management Plan (DMP).

2.2. Extant Developments (Pipeline)

Table 2 summarises the use class breakdown of developments in the pipeline (those with extant planning permission or currently under construction). Combined, pipeline developments could deliver over 30,633sqm (gross) of new or expanded retail, employment and community floorspace. However, once losses are factored in, the extant and under construction developments could lead to a substantial loss of retail, employment and community floorspace (62,267sqm net loss). Significant amount of all recorded losses (64,395sqm; 69.3%) can be attributed to E commercial, business and service uses floorspace, out of which 26.4% (17,029 sqm) comes from office/retail to residential permitted development rights.

Over a half of all E use class losses (35,517sqm) comes as a result of the redevelopment of the Legal and General offices into retirement housing. Other significant losses of E use class floorspace, other than office/retail permitted development, can be attributed to the redevelopment of Marketfield Way (1,035sqm) which is a key regeneration development in

Redhill town centre; and the redevelopment of a light industrial commercial unit at Pitwood Park Industrial Centre into residential housing (1,579sqm).

Pipeline developments for industrial and storage & distribution uses also have a potential to lead to substantial losses of floorspace (net loss of 4,586sqm of B2 and 8,416sqm of B8 floorspace). These losses can be mainly attributed to the residential re-development of Nutley Dean Business Park in Horley (2,804sqm) and Quarryside Business Park in Redhill (3,993sqm).

Table 2 Extant retail, employment & community developments

Use Class	Gain	Loss	Net
E	16,136	64,395	-48,259
E/Sui Generis	500	0	500
B2	27	4,613	-4,586
B8	805	9,221	-8,416
F.1	4,513	6,465	-1,922
F.2	1,114	634	480
Sui Generis	7,508	7,572	-64
Total	**30,633**	**92,900**	**-62,267**

The figures for individual use classes in Table 2 should be seen as indicative rather than definitive as in some cases developers seek ‘open’ permissions to allow developments to be occupied for a range of different uses (particularly for some retail and industrial developments).

It should also be noted that the DMP includes a number of site allocations for new retail and employment accommodation.

Location of Extant Development

Figure 3 shows that if all the extant and under construction permissions are completed then the majority of new gross retail, employment & community floorspace would be in Redhill (Area 2A), mostly due to the planned regeneration of Marketfield Way (3,463sqm). This is in line with Core Strategy Policy CS7 ‘Town and local centres’ which states that the majority of comparison and convenience retail growth to meet the strategic needs of the borough will be accommodated in Redhill town centre. Banstead (Area 1) will potentially see the biggest losses of retail, employment and community floorspace, largely due to the redevelopment of the Legal & General offices to retirement housing.

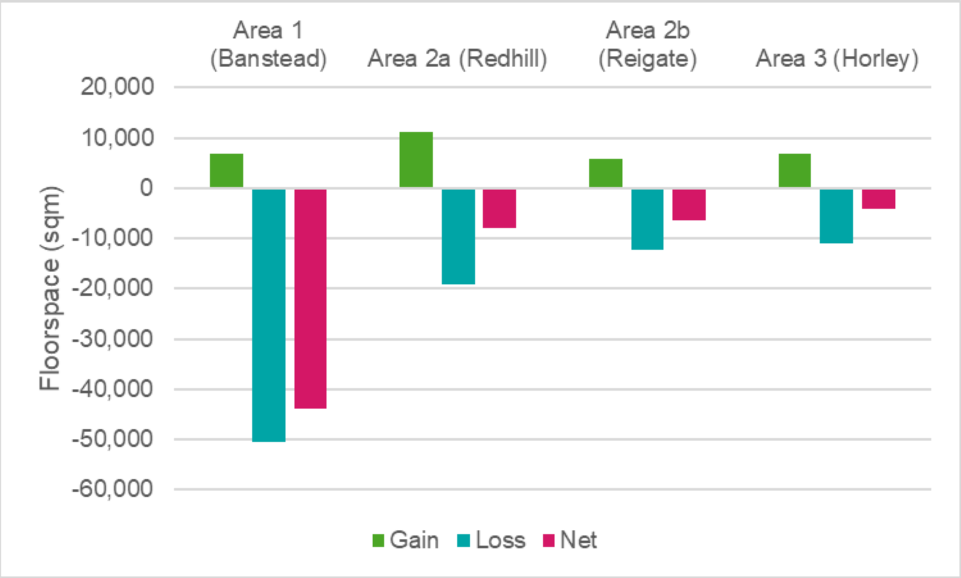

Figure 3 Extant retail, employment & community developments by borough area

3. Development Characteristics

3.1. Employment Development

Core Strategy Policy CS8 identified the need to provide approx. 46,00sqm of employment floorspace within the borough, subject to regular monitoring of demand). To inform the DMP an updated Local Economic Needs Assessment was undertaken which identified a need of between 42,921sqm and 83,582sqm. It recommended that as a minimum, 46,000sqm of employment floorspace should be provided over the plan period.

As previously mentioned, due to the changes to the Use Class Order in September 2020, it is no longer possible to fully continue monitoring the additional employment floorspace (former B1 – B8 use classes), as offices and light industrial uses now fall under E use class, together with retail and leisure developments. For the purposes of this monitor, we will therefore concentrate on B2 & B8 industrial, storage & distribution uses only.

At the end of the previous monitoring period (31 Mar 2020), the net completions of employment (B1 – B8) floorspace since the beginning of plan period stood at an overall loss of 47,337sqm. Table 3 below shows that within this monitoring period, the industrial, storage and distribution developments (B2 & B8) accounted for an additional net gain of 17, 771sqm of employment floorspace, bringing the total net cumulative completions since the beginning of plan period to a total net loss of 29,566sqm.

Table 3 Net completions and outstanding permission - employment floorspace

Position at 31 March 2021	Net sqm
Net Completions 2020/21	17,771sqm
Net Cumulative Completions since 2012/13*	-29,566sqm
Net Outstanding Permissions	-13,002sqm

**Include completions of B1 – B8 floorspace up to 31 Mar 2020 and completions of B2 & B8 floorspace from 01 Mar 2020.*

The high level of employment completions this year is largely due to the redevelopment of the former Phillips Research Laboratories site at Salfords Industrial Estate to provide 5 new commercial units. The overall plan period net loss is not considered to have significantly hampered economic prosperity and planning decisions more widely have protected other employment areas where appropriate. This will however be carefully monitored going forward.

Extant industrial, storage & distribution permissions (B2 & B8) have the potential to further reduce the amount of net employment floorspace by 13,002sqm. The loss is predominantly due to the residential re-development of Nutley Dean Business Park in Horley and Quarryside Business Park in Redhill in which the loss of employment floorspace was considered justified.

The DMP seeks to support the employment role of Principal and Local Employment Areas (Policies EMP1 and EMP2), support employment development outside of existing employment areas subject to a number of requirements (Policy EMP3) and safeguard viable employment floorspace and land where there is a reasonable prospect of continued employment use (EMP4). The DMP also allocates a number of sites for employment development, these have the potential to contribute at least 241,526sqm of additional employment floorspace, therefore above the identified requirements for the borough.

Areas Designated for Employment Use

With the adoption of the DMP, the areas designated as employment areas have been amended. Town centres and local centres are no longer designated employment areas. Instead, in line with the definition of main town centre uses, office accommodation is considered to be an appropriate use. Designated employment areas therefore only consist of principle and local employment areas as designated by the DMP policies EMP1 & EMP2.

Table 4 below shows that within this monitoring period, nearly all of the gross additional industrial, storage & distribution floorspace has been delivered in areas designated as employment areas. None of the outstanding permitted industrial, storage & distribution floorspace however, is located within this designation but is instead located in urban areas without a specific designation.

Table 4 Additional employment (B2 & B8) floorspace located in employment areas

Position at 31 March 2021	%
Completions	99.9%
Outstanding Permissions	0.0%

Table 5 shows that over this monitoring period, there has been no loss of industrial, storage & distribution floorspace (B2 & B8) to non-employment uses within areas designated for employment. Extant permissions have the potential to deliver a loss of 532sqm of industrial, storage & distribution floorspace to non-employment uses within areas designated for employment.

Table 5 Gross Loss of employment (B2 & B8) floorspace to non-employment uses in designated employment areas

Position at 31 March 2021	Gross sqm
Completions	0sqm
Outstanding Permissions	-532sqm

3.2. Retail Development

Following the changes to Use Class Order in September 2020, it is no longer possible to fully assess retail developments as defined in the Core Strategy Monitoring Framework (i.e. former A1 – A5 use classes). Majority of the retail uses now fall under E use class for commercial, business & service uses, whilst some, such as public houses and takeaways now fall under Sui generis. E use class now also includes other uses, such as offices and light industrial uses as well as community and leisure uses, such as gyms, doctors & day nurseries.

For the purposes of this monitor, retail developments will constitute all commercial, business & service uses under the E use class.

Table 6 shows that across the borough, within this monitoring period, there has been a total net loss of 13,122sqm of commercial, business & service floorspace. Extant permissions have the potential to deliver a further loss of 48,259sqm of E use class floorspace. These significant losses can be mainly attributed to the former B1 uses, accounting for a 75.4% of all gross losses delivered and 82.2% of potential gross losses coming from outstanding permissions within the E use class.

Table 6 Net completions and outstanding permissions - commercial, business and service floorspace

Position at 31 March 2021	Net sqm
Net Completions	-13,122sqm
Net Outstanding Permissions	-48,259sqm

Development within Priority Location

Across the borough, within this monitoring period, there has been a total gross gain of 1,611sqm additional commercial, business and service floorspace (E use class) and the extant permissions have the potential to deliver a further 16,136 of gross additional floorspace.

Core Strategy Policy CS7 requires most of the borough's new retail, social, community and leisure uses to be accommodated within its town centres and local centres. Figures 4 and 5 show that 70.5% of completions and 43.5% of outstanding permissions for E use class floorspace are located within the borough's town centres and local centres.

The inclusion of office and light industrial uses within the E use class however also indicates Industrial Estates to be an appropriate location for new E use class developments. Taking that into account, 89.1% of completions and 79.2% of outstanding permissions for new commercial, business & service floorspace have been accommodated within appropriate locations.

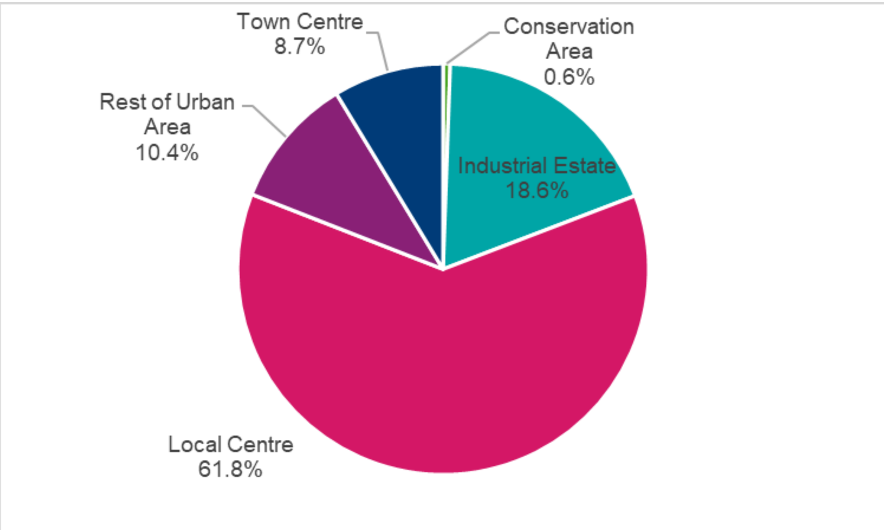

Figure 4 Location of gross additional commercial, business and service floorspace (E) – completions

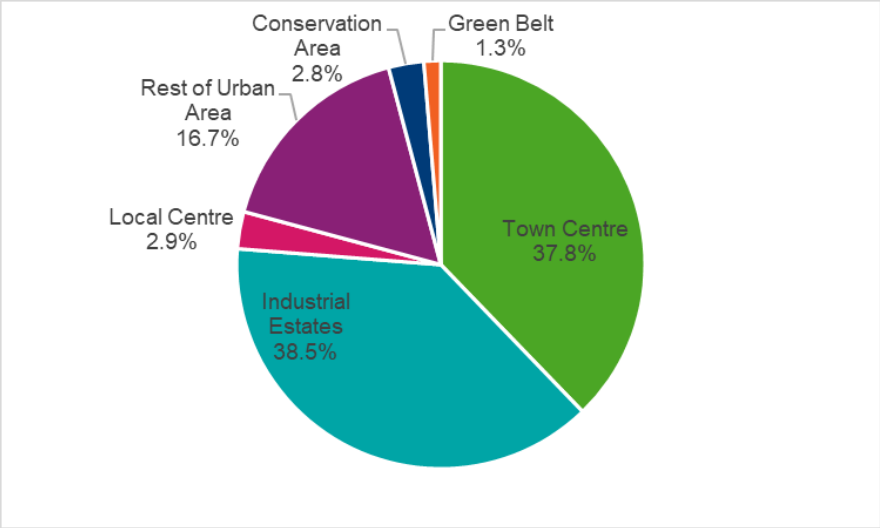

Figure 5 Location of gross additional commercial, business and service floorspace (E) – outstanding permissions

Looking specifically at the outstanding permissions, all 6,207sqm of potential new gross E use class floorspace coming from industrial estates developments consists of office and light industrial uses, most notably the redevelopment of the Horley Gas Holder Station at Balcombe Road Industrial Estate, providing 4,850sqm of new office space.

Extant developments in town centres include shops, coffee shop/restaurant uses, gym and dental and orthodontic practice. Similarly, potential gross new floorspace in local centres is for shops, coffee shop/restaurant uses and an office use. Majority of the potential new floorspace in town/local centres comes from the redevelopment of Marketfield Public Car Park to provide a mixed use scheme of retail, cinema and residential development.

When taking losses of commercial, business and service floorspace into account, table 7 shows that within this monitoring period, there has been a net loss of 8,009sqm of E use class floorspace within the town and local centres. The Outstanding permissions have the potential to deliver additional loss of 9,515sqm of E use class floorspace within the town and local centres. Majority of these losses can be attributed to office to residential permitted development.

Table 7 Net additional commercial, business & service floorspace (E use class) located within Town and Local Centres

Position at 31 March 2021	Net sqm
Completions	-8,009sqm
Outstanding Permissions	-9,515sqm

<u>In relation to specifically comparison and convenience floorspace:</u>

Both the Core Strategy and DMP require additional comparison and/or convenience floorspace, subject to regular monitoring of levels, to be delivered to enable growth across the plan period. The borough's town and local centres as suitable locations to accommodate this growth.

The Council's most recent 2016 Retail Needs Assessment identifies the need (subject to regular monitoring of demand) of approx. 12,900sqm comparison floorspace and no significant need for convenience retail over the plan period.

At the end of the last monitoring period (31 March 2020), the residual requirement for the rest of the plan period stood at 7,556sqm of comparison and convenience floorspace to be delivered within town and local centres. Due to the changes in the Use Class Order in September 2020, this indicator is however no longer possible to monitor. Convenience and comparison retail fall under E use class, together with number of other uses such as office, restaurants, gyms and health centres, and these different uses can be interchanged without a need for planning approval. Any attempts to continue monitoring additional convenience and comparison retail floorspace are therefore not practical.

Town Centres

Within town centres specifically over the course of this monitoring period there has been a net loss of commercial, business and service (E) floorspace. Extant permissions have the potential to lead to a further net loss (see table 8).

Table 8 Net additional commercial, business & service floorspace (E use class) located within Town Centres

Position at 31 March 2021	Net sqm
Completions	-6,099sqm
Outstanding Permissions	-8,811sqm

Redhill Town Centre is designated in the borough's hierarchy of town centres (Core Strategy Policy CS7) as the primary town centre in the borough and the prime focus for large-sale leisure, office, cultural and retail uses and developments.

For the purposes of this monitor, retail, leisure & community developments have been split by use class as E (includes shops, cafes, restaurants, gyms, clinics, health centres and day nurseries, as well as office and light industrial developments), F.1 (includes schools, training centres, museums, libraries and places of worship), F.2 (includes community halls, swimming pools, skating rings and outdoor recreation, as well as small community shops) and Sui Generis (includes pubs, take-aways, cinemas, dance halls, theatres, night clubs, casinos and concert halls as well as other uses such as fuel stations, betting shops, taxi business and car showrooms).

Table 9 shows that only 1.8% of all additional gross E use class floorspace completed within this monitoring period and none of F.1 or Sui Generis floorspace was accommodated within Redhill town centre. There were no F.2 completions within this monitoring period. However, 39.0% of extant permissions for E use class floorspace and 29.1% of extant permissions for Sui Generis floorspace are located within Redhill town centre.

Table 9 Additional gross retail, leisure & community developments in Redhill Town Centre

Position at 31 March 2021	E	F.1	F.2	SG
Completions	1.8%	0.0%	N/A	0.0%
Outstanding Permissions	39.0%	0.0%	0.0%	29.1%

Local Centres

Core Strategy Policy CS7 aims to maintain levels of accessible local services within the borough's local centres. The Core Strategy Monitoring Framework defines 'services' as former A1 – A5 & D1 – D2 use classes. Following the changes to the Use Class Order, this monitor will count E, F.1, F.2 and Sui Generis use classes as 'services'.

Table 10 below shows that that there has been a net loss of services within local centres during this monitoring period. The loss can be attributed to the office to residential permitted development of Furness house in Redhill Brighton Road Local Centre. It should be noted that Redhill Brighton Road Local Centre has only been designated as local centre in the DMP and was not designated at the time of the prior approval. Outstanding permissions have the potential to lead to a further loss of services within the local centres.

Table 10 Net loss of E, F.1, F.2 & Sui Generis floorspace within local centres

Position at 31 March 2021	Net sqm
Completions	-2,092sqm
Outstanding Permissions	-845sqm

3.3. Leisure & Community Development

Community and Leisure Facilities

The Core Strategy Monitoring Framework indicator states that there should not be any loss of community and leisure facilities. Within this monitoring period, 8 permissions for community and leisure facilities have been completed, none of those resulting in a loss of community and leisure facility. More information is provided within Annex 2.

Hotel and Guest Accommodations

Within this monitoring period, one scheme has been completed, providing 22 additional hotel/guest house bedrooms. The Council does not have an adopted hotel policy requirement.

School Provision

There have been several developments completed within the borough's schools this monitoring period. The demolition of an old preschool building at Woodmansterne Primary School has been completed and the construction of the replacement modular building is now under way.

Hatchlands Primary School was granted a change of use permission from a former probation office to a primary school. This permission follows on the temporary permission granted under Permitted Development in March 2018, which expired in September 2020. The former County Court building has now been demolished and works on the new primary school are nearing completion, ready for the start of the school year in September 2021. The new school will provide a total of 420 school places.

Works have been completed on the new modular school building at the Merstham Park School for a temporary period of two years, providing additional 150 school places.

Number of permissions have been granted for additional school places, including 50 spaces at an independent special school for children with autism at Rowans Hill, Chipstead and 10 spaces following an extension to Brooklands School in Reigate. Redevelopment of the Warwick School in Redhill is also under way, including demolition of main teaching block and sports facilities and construction of new teaching block and sports facilities. This development does not provide any additional school places. Other improvement works include new pool enclosure at Warren Mead Junior School, new science teaching facility at Reigate School and extension to the refectory building at Reigate College. Full details on school developments can be found in the Appendix 3.

4. Commercial Property Market

4.1. Overview

Table 11 summarises the amount of available commercial floorspace. Within the last twelve months, the amount of commercial floorspace within the borough available on the market has increased from 31,754sqm to 33,839sqm. The biggest increase in the available floorspace can be seen in the Rest of Horley, largely due to the availability of the newly built industrial/warehouse units at the North Gatwick Gateway, part of the Salfords Industrial Estate.

Table 11 Summary of available floorspace (sqm)

Area	Retail	Office	Industrial/ Warehouse	Total
Banstead Town Centre	341	230	0	**571**
Rest of Banstead	75	183	0	**258**
Reigate Town Centre	203	4,575	0	**4,778**
Rest of Reigate	55	1,658	0	**1,713**
Redhill Town Centre	308	7,551	0	**7,859**
Rest of Redhill	0	1,676	2,922	**4,598**
Horley Town Centre	185	67	0	**252**
Rest of Horley	29	1,220	12,561	**13,810**
Total	**1,196**	**17,160**	**15,483**	**33,839**

Please note the above data reflect the market situation in November 2021.

Offices remain the dominant source of available floorspace which has been the case over the past ten years. This year, the overall share decreased from 68.9% of total available floorspace to just over a half (50.7%), largely due to the aforementioned availability of the industrial units at the North Gatwick Gateway.

The amount of available retail floorspace has fallen within the last twelve months from 5,483sqm to 1,196sqm. Whilst availability in Banstead has increased slightly from (196sqm to 416sqm), the rest of the borough has seen dramatic decline in retail floorspace availability. Redhill has seen the biggest decline (from 2,021sqm last year to only 308sqm during this monitoring period), followed by Reigate (1,922sqm to 258sqm) and Horley (1,344sqm to 214sqm).

The amount of available industrial/ warehouse floorspace has risen sharply, during the last 12 months, from 4,397sqm last year to 15,483sqm in this monitoring period, accounting for nearly a half (45.8%) of all available commercial floorspace in the borough. In addition to the units available at the North Gatwick Gateway, several other large industrial/warehouse units have become available within the borough's industrial estates, including units at Balcombe, Salfords and Holmethorpe industrial estates.

Figure 6 below shows the available floorspace trend 2012-2021. After a long period of steady decline in commercial availability, the past 24 months have seen a small increase rising from 30,449 sqm in 2019 to the current 33,839sqm.

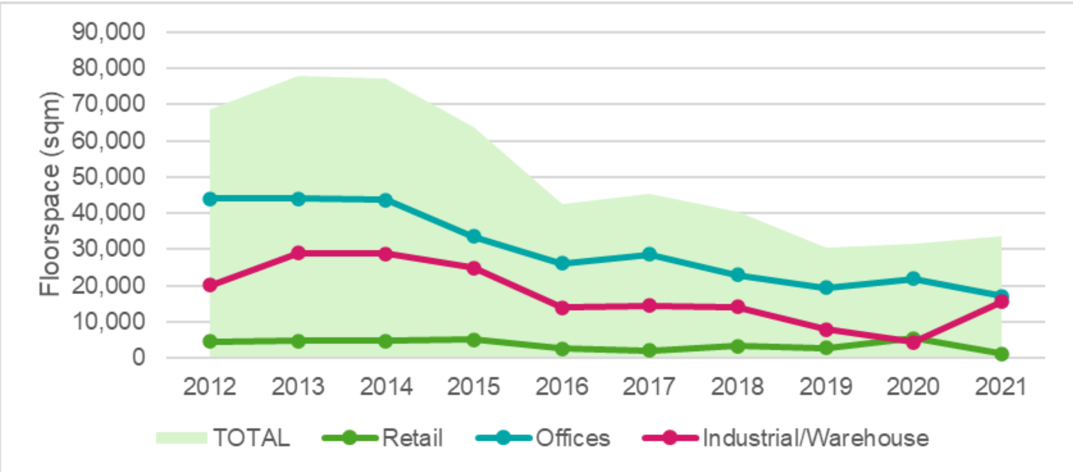

Figure 6 Available floorspace trend (2012 - 2021)

4.2. Office

Within the last twelve months, the amount of available office floorspace has decreased by 21.6% (21,874sqm to 17,160sqm).

Figure 7 shows that 44.0% of the available office floorspace is within Redhill town centre and a further 26.7% in Reigate town centre. This is due to the composition of the available floorspace in the town centres (i.e. purpose-built large office accommodation available, such as Grosvenor in Redhill and London Court in Reigate).

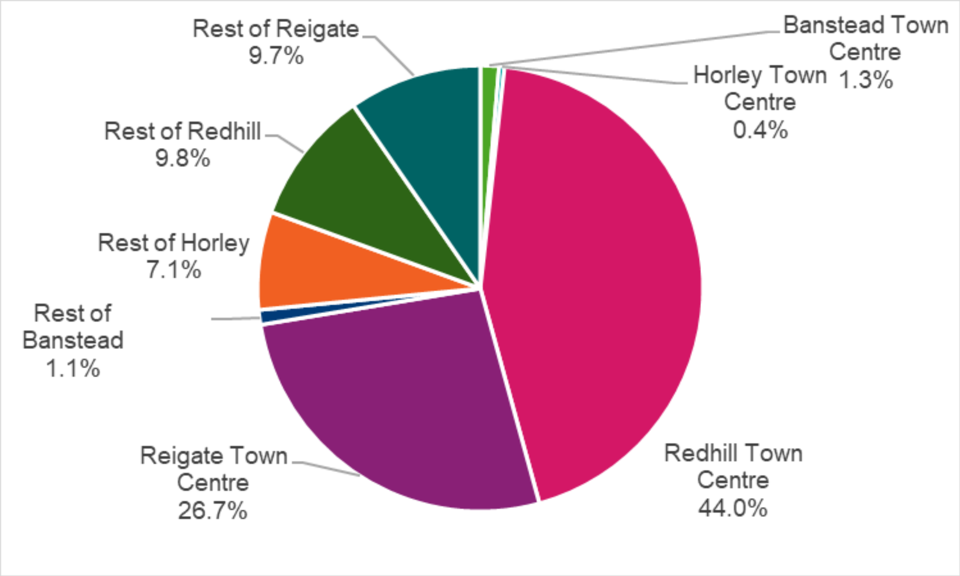

Figure 7 Geographical breakdown of available office accommodation

The majority of all available office floorspace is located in Redhill (53.8%) and in Reigate (36.4%). The amount of available floorspace has increased in both Banstead and Horley (from 310sqm to 413sqm, and from 527sqm to 1,287sqm respectively). Most of the office floorspace available is located in town centres (12,422sqm), rest of urban areas (2,416sqm) and retail warehouse area (1,165sqm), followed by industrial estates (664sqm) and local centres (492sqm). Notable office units available include Grosvenor House in Redhill (2,861sqm), 45 London Road in Reigate (1,827sqm), and Omnibus on Lesbourne Road in Reigate (1,255sqm).

4.3. Industrial & Distribution

Within the last twelve months the amount of available industrial and distribution floorspace has increased dramatically from 4,397sqm to 15,483sqm.

Figure 8 shows that the majority of the available industrial and distribution floorspace is within Horley (81.1%) with the rest being located in Redhill (18.9%).

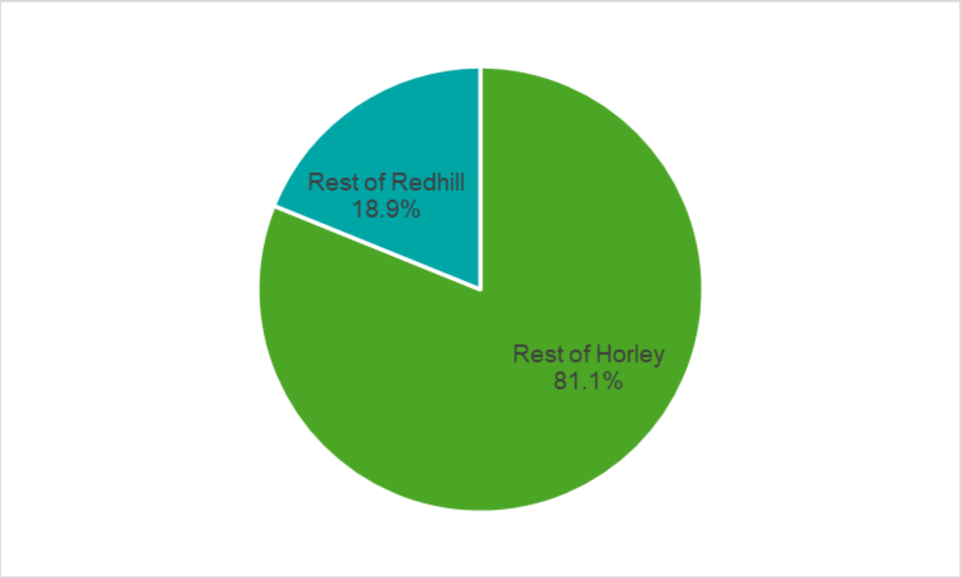

Figure 8 Geographical breakdown of available industrial and distribution accommodation

Available industrial and warehouse floorspace is without surprise mostly located in the borough's industrial estates with a total of 14,595sqm available, while the remaining 888sqm is located in other areas of Redhill. Notable available floorspace includes units at North Gatwick Gateway (7,178sqm), Unit 8 at Orchard Business Centre (1,544sqm) and a former builder's merchant yard at the Balcombe Road Industrial Estate (1,969sqm).

4.4. Retail

During the past twelve months available retail floorspace has fallen from 5,483sqm to 1,196sqm, being now at its lowest point since 2012.

As it can be seen from Figure 9, the available retail floorspace remains relatively evenly distributed across the borough, with majority currently coming from Banstead and Redhill town centres (28.5% and 25.8%, respectively).

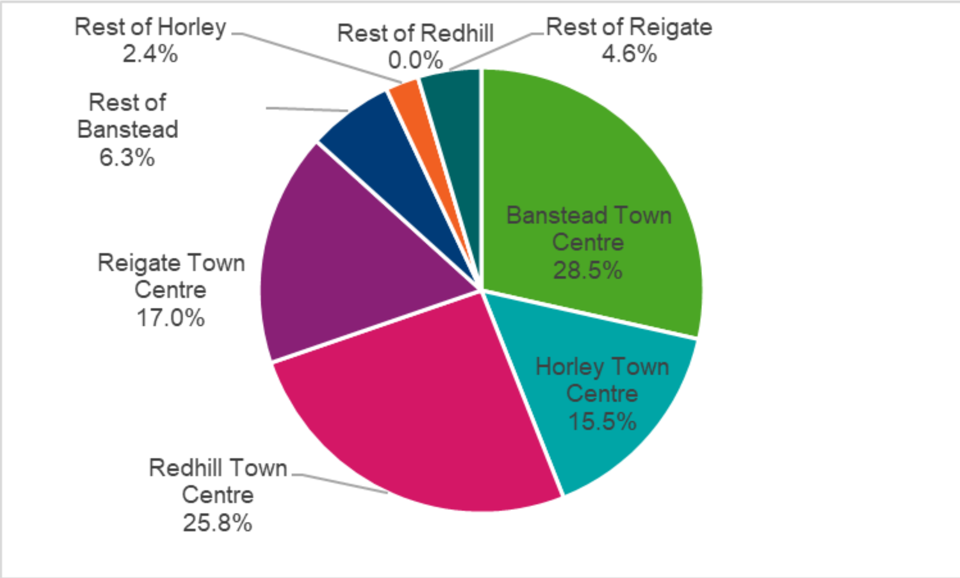

Figure 9 Geographical breakdown of available retail accommodation

All available retail floorspace is located either at the borough's designated town centres (1,037sqm) or local centres (159sqm), featuring typical high street stores of around 100 – 200sqm each.

5. Summary of Key Findings

- **Retail, Employment and Community Completions** – Over the last twelve months 23,635sqm (gross) of new retail, employment and community floorspace has been completed in the borough. Once losses (from changes of use or redevelopment away from employment/retail/community use) are taken into account, there was overall a net gain of 5,763sqm of retail, employment and community floorspace during 2020/21.
- **Extant Retail, Employment and Community Permissions (Pipeline)** – Extant and under construction schemes could create over 30,633sqm (gross) of new or expanded retail, employment and community accommodation. Once losses are factored in however the pipeline could result in a net loss of 62,267smq of employment space, the majority of which would be E commercial, business and service uses (69.3%).
- **Development Characteristics & Location** – 99.9% of gross additional industrial, storage & distribution floorspace (B2 & B8) has been delivered within the borough's designated employment areas and 70.5% of all new commercial, business and service floorspace (E use class) has been delivered within the borough's designated town centres and local centres.
- **Borough Commercial Property Market** – The amount of available commercial floorspace has increased within the last twelve months from 31,754sqm to 33,839sqm. Overall, Redhill and Reigate have both seen a decline in available floorspace (20,235sqm to 12,457sqm & 8,986sqm to 6,491sqm respectively), whilst Banstead has seen a slight increase (662sqm to 829sqm). The biggest increase in the available floorspace can be seen in Horley (1,871sqm to 14,062sqm), largely due to the availability of the newly built industrial/warehouse units at the North Gatwick Gateway.

Appendix 1: Use Classes

Use Class before 1st September 2020	Uses	Use Class from 1 September 2020
A1 (part)	Shops, retail warehouses, post offices, ticket and travel agencies, sale of cold food for consumption off premises, hairdressers, funeral directors, hire shops, dry cleaners and internet cafés.	E Commercial, Business and Service
A1 (part)	Shops not more than 280sqm mostly selling essential goods, including food and at least 1km from another similar shop.	F.2 Local community
A2	Banks, building societies, estate and employment agencies, professional services (not health or medical services)	E
A3	Restaurants and cafés.	E
B1(a), B1(b) and B1(c)	Offices other than a use within former A2 Use Class, research and development of products or processes and business premises for any industrial process (which can be carried out in any residential area without causing detriment to the amenity of the area).	E
D1 (part)	Clinics, health centres, creches, day nurseries, day centre.	E
D1 (part)	Schools, non-residential education and training centres, museums, public libraries, public halls, exhibition halls, places or worship, law court.	F.1 Learning and non-residential institutions
D2 (part)	Gymnasiums, indoor recreations not involving motorised vehicles or firearms.	E

Use Class before 1st September 2020	Uses	Use Class from 1 September 2020
D2 (part)	Indoor or outdoor swimming baths, skating rinks, and outdoor sports or recreations not involving motorised vehicles or firearms.	F.2
D2 (part)	Cinemas, concert halls, bingo halls and dance halls	Use outside of any specified use class, so within its own class, i.e. Sui Generis uses / SG
A4	Pub or drinking establishment	Use outside of any specified use class, so within its own class, i.e. Sui Generis uses / SG
A5	Hot food takeaway	Use outside of any specified use class so within its own class, i.e. Sui Generis uses / SG
B2	Industrial	Remains B2
B8	Storage and distribution	Remains B8

Appendix 2: Leisure and Community Developments

Address	Planning Reference	Description of Works	Status at 31st March 2021
The Grove Meeting Hall, The Grove, Horley	18/01736/F	Erection of replacement hall with parking.	Completed with this monitoring period
Frist Steps Nursery, Merstham	19/00563/F	Dormer extension	Completed within this monitoring period
St Peters House, Reigate	20/00387/F	Single storey extension to create an internal soft play area for Shapes Day Nursery	Completed within this monitoring period
St Peters House, Reigate	20/00795/F	Single storey extension to create staff and ancillary space for Shapes Day Nursery	Completed within this monitoring period
Mortons The Padlock, 141 - 143 Brighton Road, Redhill	18/02212/CU	Change of use from retail unit to dental practice.	Completed within this monitoring period
Redhill Orthodontic Practice, West Rock House, 43 Hatchlands Road, Redhill	19/00127/F	Single storey infill extension.	Completed within this monitoring period

Address	Planning Reference	Description of Works	Status at 31st March 2021
Archer Hayes, Castle House Rear Of, 39 Nork Way, Banstead, Surrey, SM7 1PB	19/02104/F	Change of use from office to a sports coaching studio	Completed within this monitoring period
11A Tattenham Crescent, Epsom Downs, Surrey, KT18 5QJ	20/01998/CU	Change of use from car show room to a gym	Completed within this monitoring period
Geoffrey Knight Playing Fields, Park Lane, Reigate	18/00956/F	Extension to a rugby club to provide storage and storm porch	Under construction
The Barley Mow Public House, Reigate	20/00351/F	Change of use from public house to physio clinic and hydrotherapy centre	Under construction
Lilliput Children's Centre, Lilliput Nursery, West Avenue, Salfords	18/01971/F	Development for a 76 bedroom specialist dementia nursing care home.	Under construction
Marketfield Public Car Park, Marketfield Road, Redhill	16/01066/F	Demolition of existing buildings and redevelopment to provide new multi-screen cinema and flexible retail, restaurant and café units.	Under construction

Address	Planning Reference	Description of Works	Status at 31st March 2021
The British Red Cross Centre, White Lodge Hall, The Drive, Banstead	17/01160/F	Demolition of existing buildings, resulting in a loss of a community centre to residential	Under construction
The Courtyard Theatre, Longshaw Stables, Hazelwood Lane, Chipstead	18/00649/F	Extension to workshop facilities of existing theatre	Under construction
59 High Street, Banstead	19/01807/CU	Change of use from retail to a dental surgery	Under construction
12-18 High Street, Merstham	19/01016/F	Change of use of the ground floor from retail to mixed retail and gym	Under construction
Portland Vets, 8 Sangers Mews, Horley Row, Horley, Surrey, RH6 8DH	19/02614/F	Demolition of existing outbuilding and replacement with single storey extension to provide improved facilities to veterinary surgery	Under construction
St Katharine's Church, London Road North, Merstham	18/01829/F	Erection of extension following the demolition of dilapidated annexe.	Not started
The Oakley Outdoor Centre, Merstham	18/00312/F	Demolition of modern extension and conversion of existing listed building to provide 8 flats. Conversion of existing outbuilding into two houses. Residential development of	Not started

Address	Planning Reference	Description of Works	Status at 31st March 2021
		surrounding land to provide 12 houses.	
52 High Street, Redhill	19/02534/CU	Change of use from vacant retail unit to mixed use cross-fit studio and café.	Not started
James Wells Picture Framing, 123 High Street, Banstead, Surrey, SM7 2NS	19/01999/F	Rear extension and change of use from retail to dental and orthodontic practice.	Not started
1 Church Street, Reigate, Surrey, RH2 0AA	20/00572/F	Conversion of existing office and yoga studio to residential.	Not started
Redhill And Old Coulsdon Cricket Club, The Ring Pavilion, Horley Road, Redhill, Surrey, RH1 5AL	20/00728/F	Extension to cricket pavilion to replace existing storage container.	Not started
Kingswood Fields, Millfield Lane, Lower Kingswood, Surrey, KT20 6RP	19/01184/F	Demolition of existing pavilion and ground maintenance building and erection of replacement pavilion and ground maintenance building.	Not started
Ground Floor, 1A Charman Road,	20/00298/CU	Change of use from storage to exercise studio.	Not started

Address	Planning Reference	Description of Works	Status at 31st March 2021
Redhill, Surrey, RH1 6AG			
Codes House, Yorke Road, Reigate, Surrey, RH2 9HG	20/01462/F	Demolition of a building that used to form a part of doctor's surgery and redevelopment of the site for residential.	Not started
Kingsfield Business Centre, Philanthropic Road, Redhill, Surrey, RH1 4DP	19/01605/F	Demolition of buildings a, b, c and j (offices, storage, consultation rooms & day centre for the elderly) and redevelopment for residential).	Not started

Appendix 3: School Provision

Address	Planning Reference	Description of Works	Status at 31 March 2021	Additional School Places
Woodmansterne Primary School, Carshalton Road, Woodmansterne, Surrey, SM7 3HU	20/00305/DED	Demolition and removal of single storey pre-school building	Completed	0
Woodmansterne Primary School, Carshalton Road, Woodmansterne, Surrey, SM7 3HU	20/01416/F	Erection of modular building to accommodate the existing facilities from previously demolished building.	Under construction	0
Hatchlands Primary School, Hatchlands Road, Redhill, Surrey, RH1 6BL	20/01059/CU	Change of use of former probation office to primary school/children's day nursery	Completed	0
Hatchlands Primary School, Hatchlands Road, Redhill, Surrey, RH1 6BL	18/02477/F	Demolition of former Redhill county and magistrates court and erection of 2 form entry primary school.	Under construction	420

Address	Planning Reference	Description of Works	Status at 31 March 2021	Additional School Places
Merstham Park School, Taynton Drive, Merstham, Surrey	20/00815/F	Erection of modular school accommodation for a temporary period of two years.	Completed	150
Warren Mead Junior School, Roundwood Way, Banstead, Surrey, SM7 1EJ	19/01285/F	New pool enclosure	Not started	0
Reigate School, Pendleton Road, Reigate, Surrey, RH2 7NT	20/01088/F	Proposed new single storey science teaching facility	Not started	0
Reigate College, Castlefield Road, Reigate, Surrey, RH2 0SD	20/01409/F	Extension to the refectory building.	Under construction	0
Rowans Hill, Coulsdon Lane, Chipstead, Coulsdon, Surrey, CR5 3QG	19/02269/F	Change of use to an independent special school for children with autism and related special educational needs.	Not started	50

Address	Planning Reference	Description of Works	Status at 31 March 2021	Additional School Places
Brooklands School, Alexander Road, Reigate, Surrey, RH2 8ED	21/00189/CON	Extension to the main school building and construction of single storey teaching block.	Not started	10
The Warwick School, Noke Drive, Redhill, Surrey, RH1 4AD	18/01637/F	Demolition of main teaching block and sports facilities. Construction of new main teaching block and sports facilities.	Under construction	0
Priory School, Bolters Lane, Banstead, Surrey, SM7 2AJ	19/00472/F	Demolition of existing buildings and redevelopment to provide retirement apartments. Site is a former private school, which has been vacant following amalgamation of several schools in the area.	Under construction	0

Monitoring Publications

Annual Monitoring Report

Summarises the Council's performance against key monitoring indicators

Housing Delivery

Provides information on housing completions and permissions and details the Council's 5 years land supply position

Commercial Development

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

Industrial Estates

Contains an analysis of occupational trends in the borough's seven main Industrial Estates

Local Centres

Provides information on retail provision in the borough's 27 local shopping centres

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

Environment & Sustainability

Provides information about performance against the environmental, sustainability and transport indicators; information on environmental quality, air quality and the condition of nature conservation sites; and details local transport improvement projects.

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

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