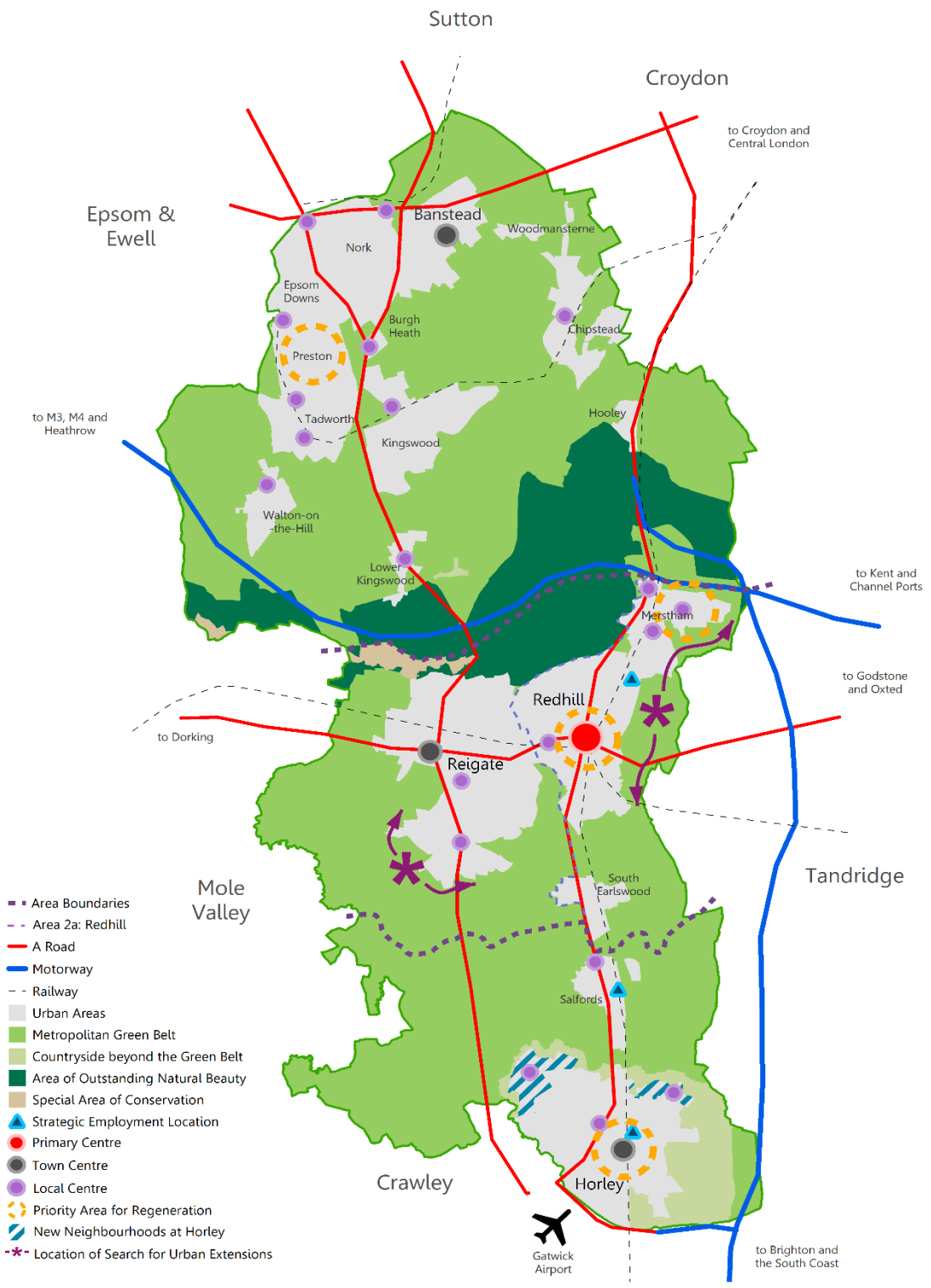




Commercial, Leisure & Community Commitments Monitor

Position at 31 March 2022



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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 commercial property market began to bounce back in the first few months of 2022 despite all the issues and difficulties associated with the Covid-19 pandemic (Carter Jonas, 2022). During Q1 2022, the UK GDP grew by around 0.8%. The quarterly index figures suggest that the economy remains 0.4% below the pre-pandemic level in 2019, whereas the monthly GDP index states that the economy has in fact risen above the pre-pandemic level, due to differences in methods (Avison Young, 2022). With the end of the furlough scheme in September 2021, the employment rate continued to rise during this period, reaching 75.6% in March 2022, whilst the unemployment rate decreased to 3.9%, which is below the pre-pandemic level. However, prospects of this economic continued recovery will have to be monitored carefully considering the risks of any new Covid variants, rising energy prices and the economic effects of the Ukraine-Russian war.

The Purchasing Manager's Index (PMI) for the services, construction and manufacturing sectors all saw differing outcomes by March 2022. The services sector PMI continued to increase to 62.6, reflecting the rollback of Covid restrictions. The construction sector PMI stayed the same at 59.1, whilst the manufacturing sector PMI decelerated month-on-month to 55.2 (Avison Young, 2022).

The start of 2022 saw mixed conditions for the commercial market, with the rolling investment volumes across the market in year leading up to March 2022 totalling £65.9 billion, slightly higher than the figure at the end of Q3 (£64.8 bn). In the last three months of the year, office sales had increased, whilst retail and industrial sales remained similar.

Office rental value growth increased during the final months of 2021, but slightly decreased during the start of 2022. The National Big Nine office markets delivered a total take-up for 2021 of 8.2 million sqft, 42% up during the same time in 2020. Although capital value growth for the office market saw a general stop-go pattern due to the uncertainty of working from home patterns and economic issues, there was an overall £20.5 billion invested in UK offices during the year, which is almost double the £11.2 billion figure in the previous year by March 2021, as well as being higher than pre-covid levels, where offices saw a £17.8 billion investment in the year to December 2019.

According to Springboard, the overall footfall across the UK was around 3% below pre-Covid level. Retail sales volumes declined in the final two months of the year, by 0.3% in February

and 1.4% in March 2022. However, retail data suggests that physical shops may be regaining popularity, with online retail sales down to 27.8%, having been at 37.7% a year earlier during lockdown. Overall, retail property investment was recorded at £7.5 billion in the year to March 2022, up from March 2021, when it was at £5.2 billion.

The industrial continued to deliver record levels of growth, with total returns reaching 40.7% in February 2022. The take-up of Grade A space over 100,000 sqft exceeded 49million sqft in 2021 due to the large success of online retail and e-commerce. Overall, investment in the industrial market stood at £17.2 billion in the year to March 2022, significantly higher than the £7.7 billion figure during the year to December 2019.

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 monitoring periods from 2020 and before. 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.

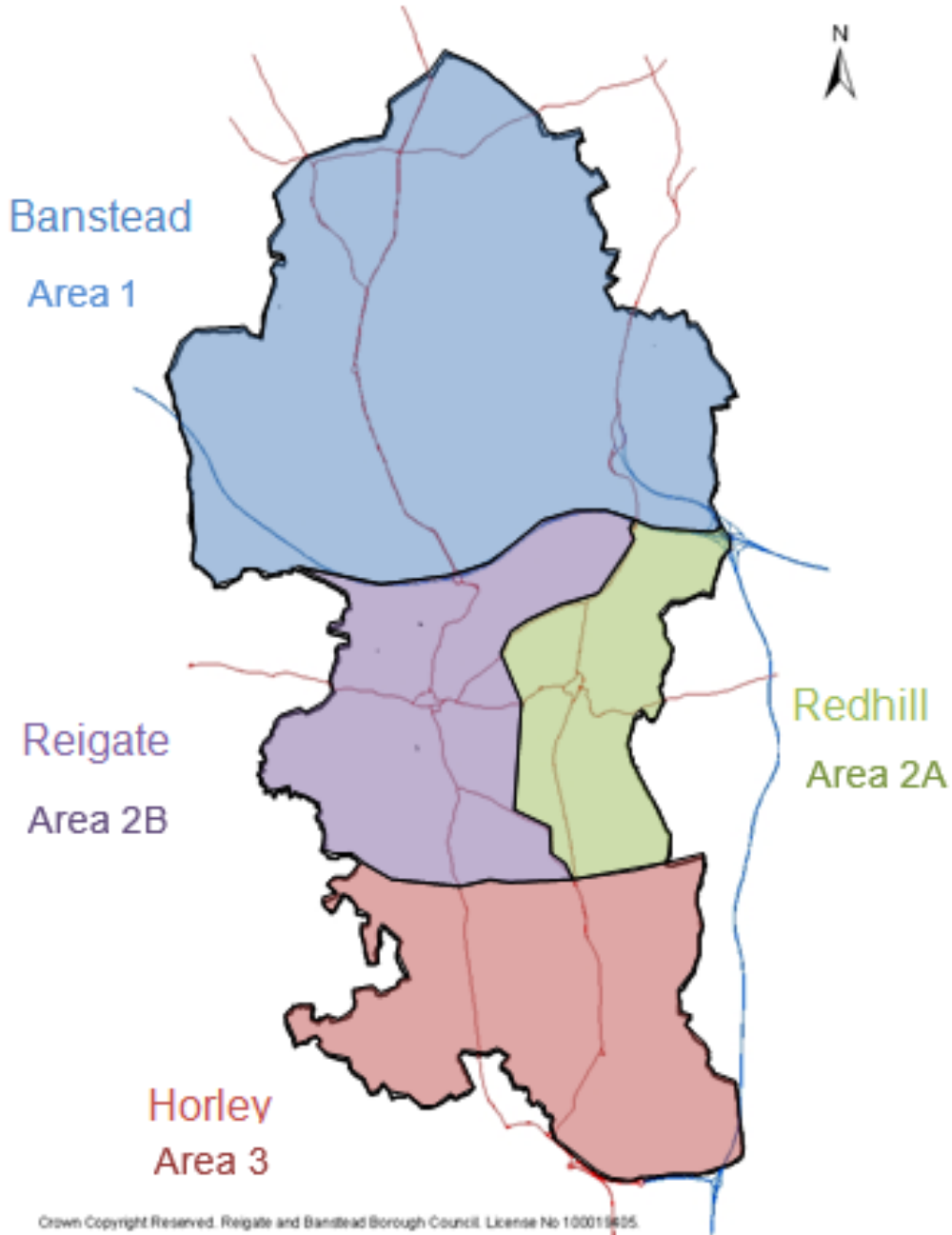


Figure 2 Reigate & Banstead four Core Strategy areas

2. Employment, Retail & Community Development Summary

2.1. Completions

Over the last twelve months 6,826sqm (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 and community uses) are taken into account, there was overall a net loss of 10,649sqm of retail, employment and community floorspace during 2021 to 2022. 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	2,419	10,766	-8,347
B8	0	982	-982
F.1	2,216	3,117	-901
Sui Generis	1,030	2,610	-1,580
E/Sui Generis	1,161	0	1,161
Total	6,826	17,475	-10,649

The majority of the gross new retail, employment and community floorspace completed in this monitoring period comes from E commercial, business & service uses (2,419sqm), followed by community F.1 uses (2,216sqm) and a mix of E and Sui Generis uses (1,161sqm).

Notable schemes include:

- Demolition of the former Redhill County and Magistrates Court to form a two-form primary school which will provide 2,145sqm of F.1 floorspace (18/02477/F)

- Change of use from a car showroom to provide 1,289sqm of new E floorspace (21/00185/CU)

The biggest losses of retail, employment and community floorspace during this monitoring period came from E commercial, business & service uses (10,766sqm). The largest of these was through the residential development at Warwick House, which accounted for 2,615sqm of the E use class loss, followed by the demolition of an industrial building at Pitwood Park and the formation of residential dwellings, resulting in the loss of 1,579sqm of E use class. Other notable losses came from the loss of 2,448sqm of F.1 use class floorspace from the Redhill County and Magistrates Court scheme under the permission 18/02477/F, as well as the loss of 1,043sqm of E use class and the development of 48 residential dwellings under the permission 13/02289/OUT.

Previously Developed Land

100% of the gross retail, employment & community floorspace completed within the past year was on previously developed land. This is above the Core Strategy Monitoring Target of 90%.

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 up to 34,436sqm (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 (68,751sqm net loss). Significant amount of all recorded losses (71,768sqm; 69.2%) can be attributed to E commercial, business and service uses floorspace, out of which 35.6% (25,576 sqm) comes from office or retail to residential permitted development rights.

Just under 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 or 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 an existing surgery at 34 Brighton Road, Banstead, into residential housing (920sqm).

Pipeline developments for industrial and storage & distribution uses also have a potential to lead to substantial losses of floorspace (net loss of 4,613sqm of B2 and 7,159sqm 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	17,435	71,356	-53,921
E/Sui Generis	162	0	162
E/B8	127	5,255	-5,128
E/B2/B8	310	0	310
B2	0	4,613	-4,613
B8	840	7,999	-7,159
F.1	6,396	5,174	1,222
F.2	1,327	634	693
Sui Generis	7,839	8,156	-317
Total	34,436	103,187	-68,751

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.

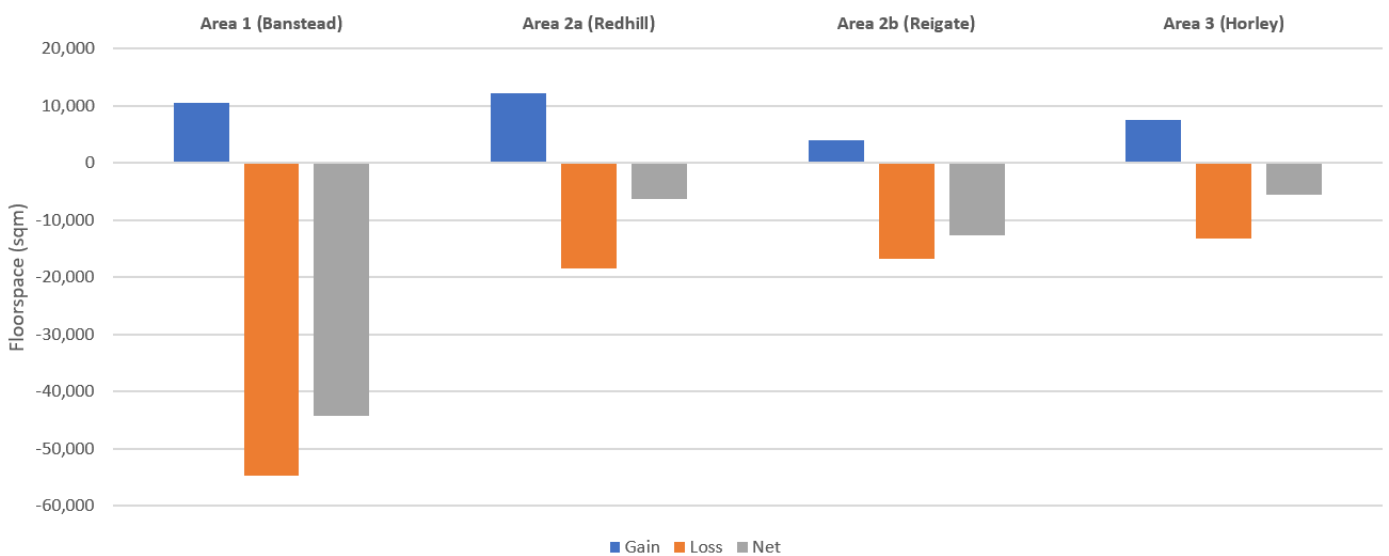


Figure 3 Extant retail, employment & community developments by borough area

3. Development Characteristics

3.1. Employment Development

Core Strategy Policy CS8 identified the need to provide approx. 46,000sqm 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.

As of 31st March 2020, the net completions of employment (B1 – B8) floorspace since the beginning of plan period stood at an overall loss of 29,566sqm. During the last monitoring period, (01 Apr 2020 – 31 March 2021), the industrial, storage and distribution developments (B2 & B8) accounted for an additional net gain of 17,771sqm of employment space and during this monitoring period, a net loss of 982sqm was recorded. Table 3 below shows that the total net cumulative completions since the beginning of plan period to a total net loss of 30,548sqm.

Table 3 Net completions and outstanding permission - employment floorspace

Position at 31 March 2022	Net sqm
Net Completions 2021/22	-982sqm
Net Cumulative Completions since 2012/13*	-30,548sqm
Net Outstanding Permissions	-11,322sqm

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

Although there was a small overall net loss of employment space over the past year, there have been no completions of B2 or B8 employment space during this monitoring period. 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 11,322sqm. The largest of these employment losses would come from the loss of 883sqm employment land at Nicola Farm.

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, as there were no completions of any gross additional industrial, storage & distribution floorspace, none have 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 2022	%
Completions	0.0%
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 2022	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). The 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 8,347sqm of commercial, business & service floorspace. Extant permissions have the potential to deliver a further loss of 53,921sqm of E use class floorspace. These significant losses can be mainly attributed to the former B1 uses, accounting for a 62.8% of all gross losses delivered and 66.6% 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 2022	Net sqm
Net Completions	-8,347sqm
Net Outstanding Permissions	-53,921sqm

Development within Priority Location

Across the borough, within this monitoring period, there has been a total gross gain of 2,419sqm additional commercial, business and service floorspace (E use class) and the extant permissions have the potential to deliver a further 17,435sqm 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 15.1% of completions and 36.4% 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, 15.1% of completions and 71.6% of outstanding permissions for new commercial, business & service floorspace have been accommodated within appropriate

locations.

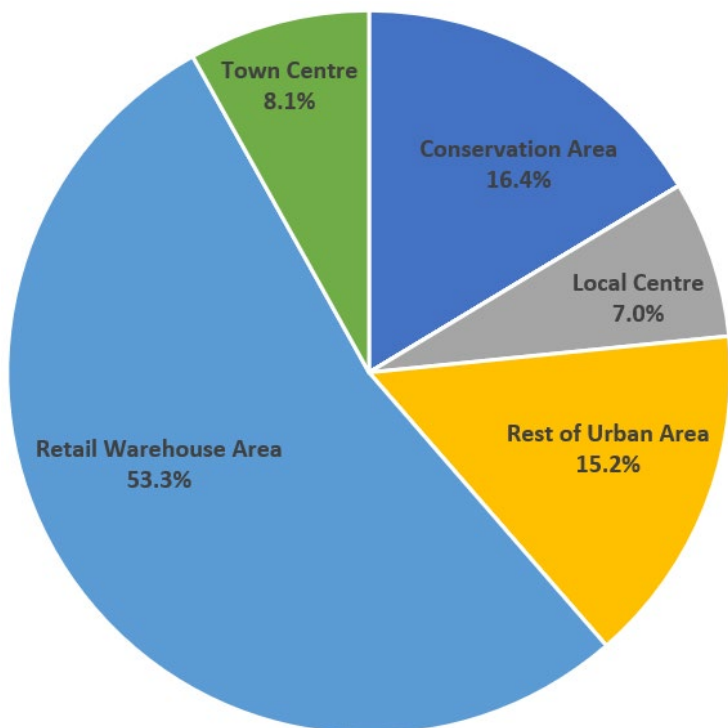


Figure 4 Location of gross additional commercial, business and service floorspace (E) – completions

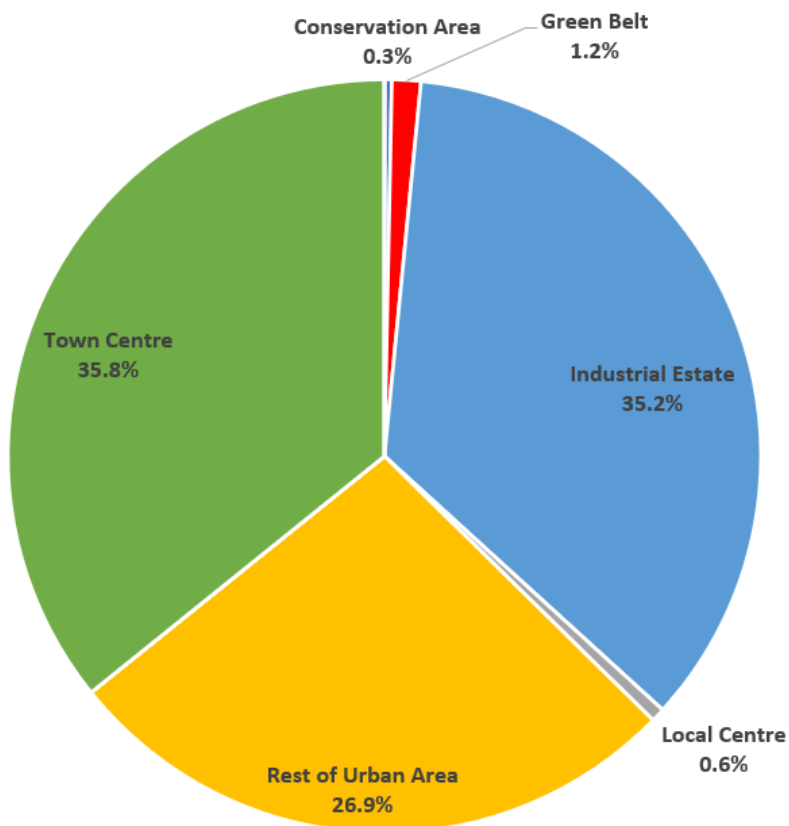


Figure 5 Location of gross additional commercial, business and service floorspace (E) – outstanding permissions

Looking specifically at the outstanding permissions, all 6,138sqm 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 shops, restaurant uses and a cinema. Similarly, potential gross new floorspace in local centres is for shops. The majority of the potential new floorspace in town and 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 5,706sqm of E use class floorspace within the town and local centres. The outstanding permissions have the potential to deliver additional net loss of 11,598sqm of E use class floorspace within the town and local centres. The 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 2022	Net sqm
Completions	-5,706sqm
Outstanding Permissions	-11,598sqm

In relation to specifically comparison and convenience floorspace:

Both the Core Strategy and DMP require additional comparison and 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 are 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.

As of 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 2022	Net sqm
Completions	-4,438sqm
Outstanding Permissions	-10,120sqm

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 there was no additional gross floorspace of E, F.1 or Sui Generis use class completed within this monitoring period in Redhill town centre. There were no F.2 completions within this monitoring period. However, 33.8% of extant permissions for E use class floorspace and 23.4% 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 2022	E	F.1	F.2	SG
Completions	0.0%	0.0%	N/A	0.0%
Outstanding Permissions	33.8%	0.0%	0.0%	23.4%

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. 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 2022	Net sqm
Completions	-1,966sqm
Outstanding Permissions	-1,586sqm

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, 5 permissions for community and leisure facilities have been completed. 1 of these resulted in a loss of a community and leisure facility. More information is provided within Annex 2.

Hotel and Guest Accommodations

Within this monitoring period, three schemes have been completed, resulting in a loss of 45 hotel or 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 was completed in the previous monitoring period and the construction of the replacement modular building has been completed in this monitoring period.

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 been demolished and works on the new primary school have been completed during this monitoring period. The new school will provide a total of 420 school places.

A 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 900 spaces following the demolition of the main school buildings and sports hall and the development of a new two and three storey secondary school building at Merstham Park School. 10 additional spaces following an extension to Brooklands School in Reigate are now under construction. Redevelopment of Warwick School in Redhill has also been completed within this monitoring period, which included the demolition of the main teaching block and sports facilities and the construction of a 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, temporary school office building and first floor classroom above previous single storey extension at Reigate School, extension to the refectory building at Reigate College, and a new classroom at Dovers Green School. 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 33,837sqm to 53,297sqm. The biggest increase in the available floorspace can be seen in the Rest of Banstead, primarily through the increase in available office floorspace, particularly at the Walton Oaks office complex in Tadworth.

Table 11 Summary of available floorspace (sqm)

Area	Retail	Office	Industrial/ Warehouse	Total
Banstead Town Centre	208	284	0	492
Rest of Banstead	120	7,748	1,246	9,114
Reigate Town Centre	562	7,828	0	8,390
Rest of Reigate	56	4,363	2,023	6,442
Redhill Town Centre	184	8,003	0	8,187
Rest of Redhill	0	584	7,684	8,268
Horley Town Centre	196	67	0	263
Rest of Horley	29	872	11,240	12,141
Total	1,355	29,749	22,193	53,297

Offices remain the dominant source of available floorspace which has been the case over the past ten years. This year, the overall share for office space slightly increased from 50.7% of the total available floorspace to 55.8%, largely due to the aforementioned availability of the office units at the Walton Oaks office complex.

The amount of available retail floorspace has increased slightly within the last twelve months from 1,196sqm to 1,355sqm. Reigate had the largest increase in retail floorspace from 258sqm to 618sqm, whilst Horley also had a slight increase, from 214sqm to 225sqm. Banstead and Redhill have had decreases in available retail floorspace within the past twelve months, with Redhill having a decrease from 308sqm to 184sqm, and Banstead having a decrease from 416sqm to 328sqm.

The amount of available industrial and warehouse floorspace has risen, during the last 12 months, from 15,483sqm last year to 22,193sqm in this monitoring period, accounting for 41.6% of all available commercial floorspace in the borough. In addition to the units available at the North Gatwick Gateway, several other large industrial and warehouse units have become available within the borough’s industrial estates, including units at Balcombe, Salfords and Holmethorpe industrial estates. Redhill has seen the largest increase in industrial and warehouse floorspace, from 2,922sqm to 7,684sqm.

Figure 6 below shows the available floorspace trend 2012-2022. The past twelve months have seen a relatively large increase of available floorspace within the borough, where there has been an increase from 33,839sqm to 53,297sqm. There has been an increase in the total amount of floorspace for all commercial floorspaces from the previous monitoring period.

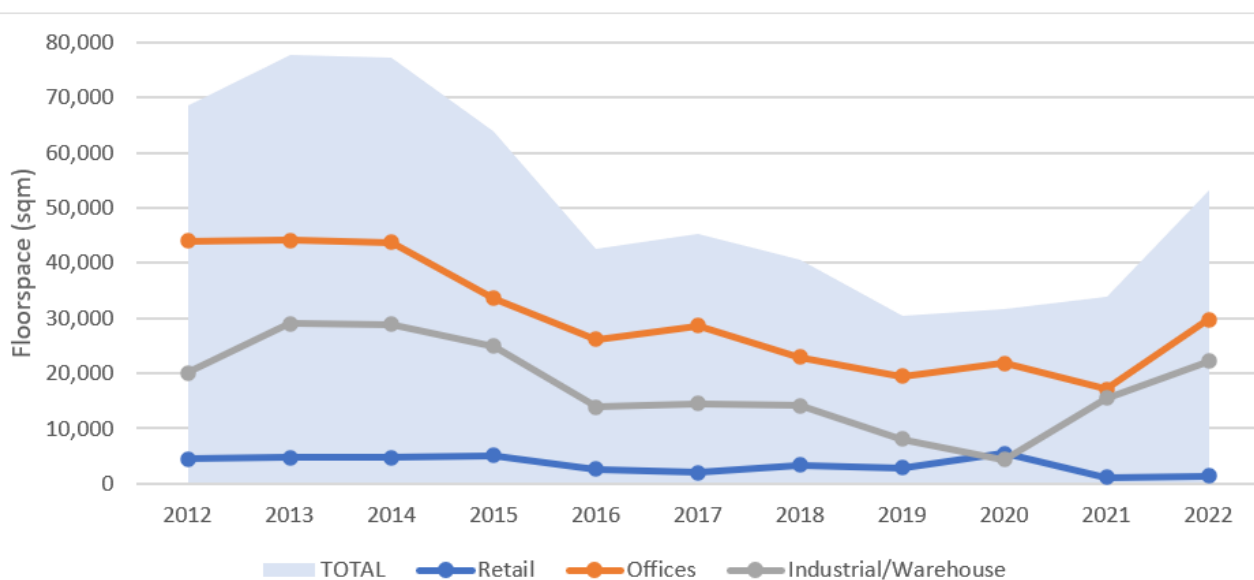


Figure 6 Available floorspace trend (2012 to 2022)

4.2. Office

Within the last twelve months, the amount of available office floorspace has increased from 17,160sqm to 29,747sqm.

Figure 7 shows that most of the available office floorspace is within Redhill town centre (26.9%), Reigate town centre (26.3%) and the rest of Banstead (26.0%). Redhill and Reigate town centres have a large composition of available floorspace due to the purpose-built large office accommodation available, such as Grosvenor in Redhill and London Court in Reigate. The rest of Banstead has seen a large increase in available office floorspace due to the Walton Oaks office complex.

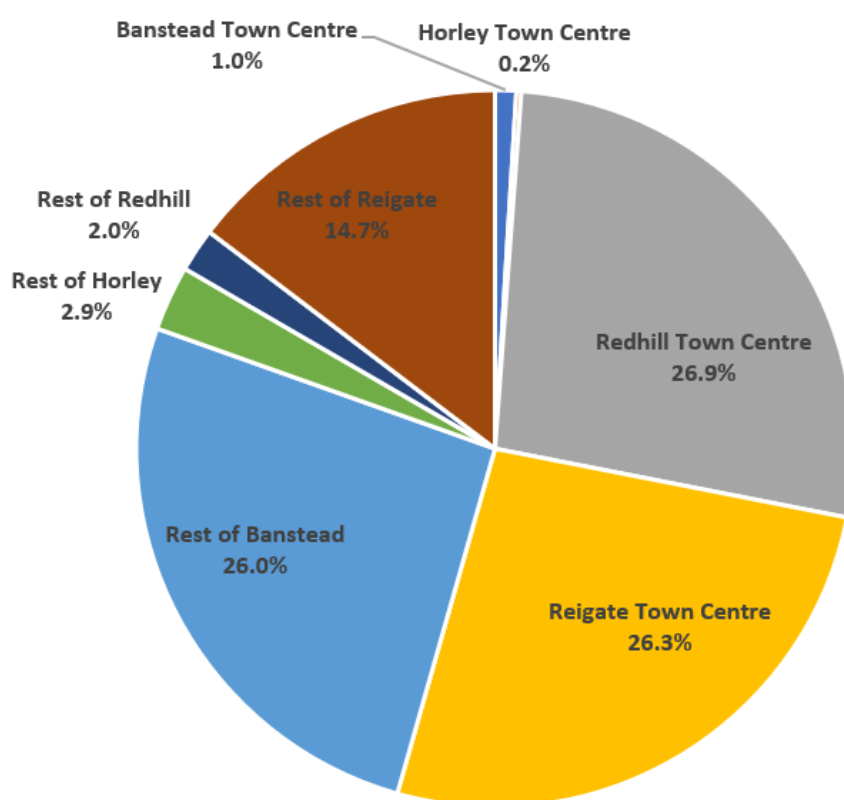


Figure 7 Geographical breakdown of available office accommodation

Reigate has the most available office floorspace during this monitoring period at 41.0%, followed by Redhill (28.9%) and Banstead (27.0%). Horley has the least available office floorspace at only 3.1%. Banstead and Reigate have both seen increases in available office floorspace from the previous monitoring period (from 413sqm to 8,032sqm and 6,233sqm to 12,191sqm respectively), whilst Horley and Redhill have both seen decreases in available office floorspace (from 1,287sqm to 939sqm and 9,227sqm to 8,587sqm respectively). Most

of the office floorspace available is located in town centres (16,183sqm), followed by rest of urban areas (12,949sqm) and local centres (618sqm). Notable office units available include Walton Oaks in Banstead (7,485sqm), Douglas House, 40 London Road in Reigate (2,341sqm), and 45 London Road in Reigate (1,827sqm).

4.3. Industrial & Distribution

Within the last twelve months the amount of available industrial and distribution floorspace has increased from 15,483sqm to 22,193sqm.

Figure 8 shows that more than half of the available industrial and distribution floorspace is within Horley (50.6%), and more than a third is located in Redhill (34.6%). Reigate takes up 9.1% of the available industrial and distribution floorspace, with Banstead making up the remaining amount (5.6%).

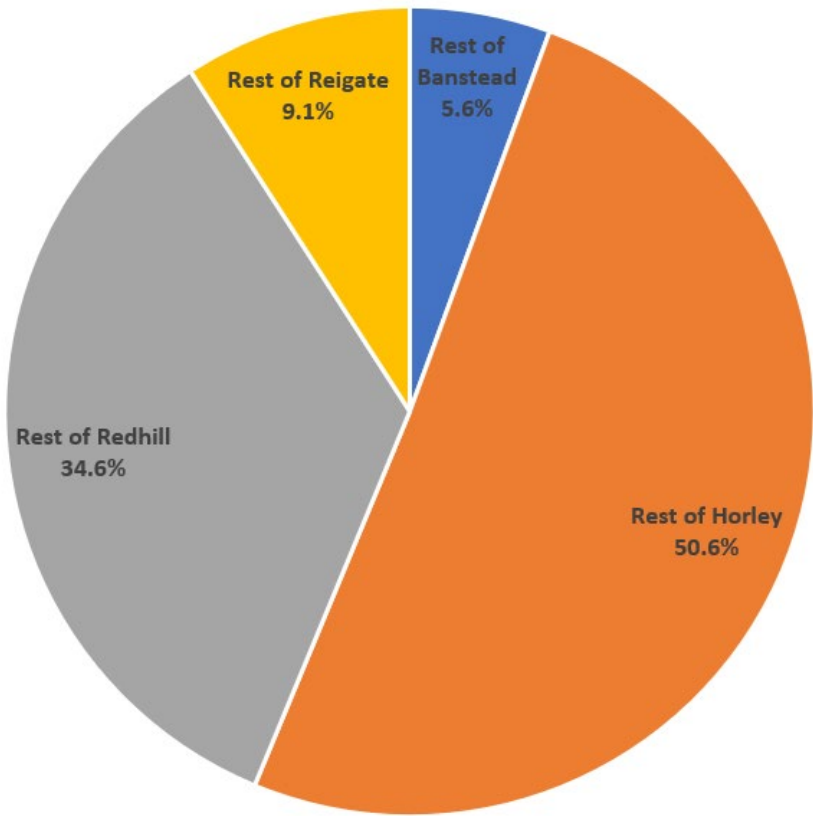


Figure 8 Geographical breakdown of available industrial and distribution accommodation

Available industrial and warehouse floorspace is without surprise mostly located in the borough's industrial estates with a total of 19,376sqm available, while the remaining 2,817sqm is located in the rest of the urban areas. Notable available floorspace includes

units at North Gatwick Gateway (7,178sqm), units at Saltwhistle Business Park (2,933sqm) and 50-52 Albert Road North, Reigate (2,023sqm).

4.4. Retail

During the past twelve months available retail floorspace has increased slightly from 1,196sqm to 1,354sqm

As it can be seen from Figure 9, Reigate has the most available retail floorspace at 45.6%, followed by Banstead at 24.3%, Horley at 16.6% and Redhill at 13.6%.

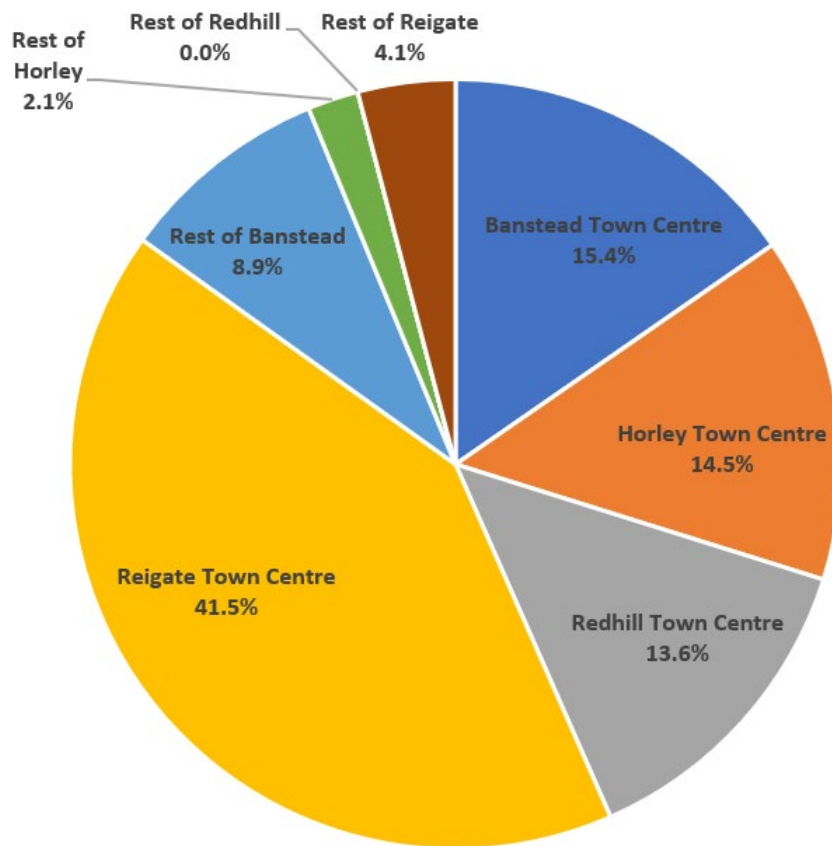


Figure 9 Geographical breakdown of available retail accommodation

All available retail floorspace is located either at the borough's designated town centres (1,150sqm) or local centres (206sqm), 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 6,826sqm (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 and community uses) are taken into account, there was overall a net loss of 10,649sqm of retail, employment and community floorspace during 2021 to 2022.
- **Extant Retail, Employment and Community Permissions (Pipeline)** – Extant and under construction schemes could create over 34,436sqm (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 68,751sqm of employment space, the majority of which would be E commercial, business and service uses (69.2%).
- **Development Characteristics & Location** – No additional industrial, storage & distribution floorspace (B2 & B8) has been delivered within the borough's designated employment areas and 15.1% 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 33,837sqm to 53,297sqm. Overall, only Horley saw a decline in available floorspace (14,062sqm to 12,404sqm). All of Banstead, Redhill and Reigate all saw increases in available floorspace (829sqm to 9,606sqm, 12,457sqm to 16,455sqm, and 6,491sqm to 14,832sqm respectively). The large increases in both Banstead and Reigate can largely be attributed to the Walton Oaks office complex, Tadworth for Banstead, and the availability of various office blocks along London Road for Reigate.

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 31 st March 2022
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	Completed within this monitoring period
12-18 High Street, Merstham	19/01016/F	Change of use of the ground floor from retail to mixed retail and gym	Completed within this monitoring period
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	Completed within this monitoring period
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.	Completed within this monitoring period
522 Chipstead Valley Road, Chipstead, Coulsdon, Surrey, CR5 3BN	20/00522/CU	Extended change of use from residential to clinic (Class c to d)	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

Address	Planning Reference	Description of Works	Status at 31 st March 2022
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
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
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 surrounding land to provide 12 houses.	Under construction

Address	Planning Reference	Description of Works	Status at 31 st March 2022
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.	Under construction
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).	Under construction
The Epiphany House, Mansfield Drive, Merstham, Redhill, Surrey, RH1 3JP	19/02559/F	Demolition of existing properties and erection of 10 houses	Under construction
St Katharine's Church, London Road North, Merstham	18/01829/F	Erection of extension following the demolition of dilapidated annexe.	Not started
52 High Street, Redhill	19/02534/CU	Change of use from vacant retail unit to mixed use cross-fit studio and café.	Not started
1 Church Street, Reigate, Surrey, RH2 0AA	20/00572/F	Conversion of existing office and yoga studio to residential.	Not started

Address	Planning Reference	Description of Works	Status at 31 st March 2022
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, Redhill, Surrey, RH1 6AG	20/00298/CU	Change of use from storage to exercise studio.	Not started
Chipstead Golf Club, How Lane, Chipstead, Surrey, CR5 3LN	21/00801/F	Proposed construction of covered driving range station	Not started
Battlebridge Hall, 181 Frenches Road, Redhill, Surrey, RH1 2HZ	21/01643/F	Loft conversion with roof lights to be used as prayer hall	Not started
Salfords Cricket Club, The Pavilion, Petridgewood Common, Woodhatch Road,	21/00110/F	Demolition of existing single storey timber cricket pavilion and construction of new single storey timber cricket pavilion	Not started

Address	Planning Reference	Description of Works	Status at 31 st March 2022
Redhill, Surrey, RH1 5JH			
Banstead Physio and Therapies, 133A High Street, Banstead, Surrey, SM7 2NS	21/01507/F	Change of use of upper floors from d1 to residential use (c3)	Not started
The Children's Trust, Tadworth Court, 2 Tadworth Street, Tadworth, Surrey, KT20 5RU	21/02090/F	Demolition of an existing single storey school building to facilitate development of a replacement specialist multi-purpose education and therapy-led facility for children with complex clinical leads (f1)	Not started

Appendix 3: School Provision

Address	Planning Reference	Description of Works	Status at 31 March 2022	Additional School Places
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.	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.	Completed	420
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

Address	Planning Reference	Description of Works	Status at 31 March 2022	Additional School Places
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
Brooklands School, Alexander Road, Reigate, Surrey, RH2 8ED	21/00189/CON	Extension to the main school building and construction of single storey teaching block.	Under construction	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.	Completed	0

Address	Planning Reference	Description of Works	Status at 31 March 2022	Additional School Places
<p>Priory School, Bolters Lane, Banstead, Surrey, SM7 2AJ</p>	<p>19/00472/F</p>	<p>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.</p>	<p>Under construction</p>	<p>0</p>
<p>Merstham Park School, Taynton Drive, Merstham, Surrey</p>	<p>20/01591/F</p>	<p>Demolition of existing school buildings, including main school buildings, sports hall and ancillary building and erection of new part two, part three storey secondary school, car parking and play space</p>	<p>Not started</p>	<p>900</p>
<p>Reigate St Marys School, Chart Lane, Reigate, Surrey, RH2 7RN</p>	<p>21/00816/F</p>	<p>Proposed new temporary two storey classroom building</p>	<p>Completed</p>	<p>0</p>

Address	Planning Reference	Description of Works	Status at 31 March 2022	Additional School Places
Reigate School, Pendleton Road, Reigate, Surrey, RH2 7NT	21/02179/F	Temporary school office building	Not started	0
Reigate School, Pendleton Road, Reigate, Surrey, RH2 7NT	21/02180/F	1 st floor classroom above previous single storey extension	Not started	0
Dovers Green School, Rushetts Road, Reigate, Surrey, RH2 7RF	21/02181/F	New outbuilding/classroom	Not started	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:

Planning Policy Team

Tel: 01737 276178

Email: LDF@reigate-banstead.gov.uk