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# Reigate & Banstead Housing Needs Assessment 2024

Housing Market Area: Technical Paper

Iceni Projects Limited on behalf of  
Reigate & Banstead Borough Council

June 2024

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LIMITED ON BEHALF  
OF REIGATE &  
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Reigate & Banstead Housing Needs  
Assessment 2024  
HOUSING MARKET AREA: TECHNICAL  
PAPER



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# 1. Introduction

- 1.1 Reigate and Banstead Borough Council has commissioned Icení Projects ('Icení') and Justin Gardner Consulting ('JGC') to prepare a Local Housing Needs Assessment. The Assessment will consider the overall need for housing in the Borough, as well as the needs for different types of homes including the need for affordable housing, as well as older persons and those with disabilities.
- 1.2 This technical paper has been prepared by Icení as a supporting document to the Assessment in order to review and confirm the Housing Market Area within which Reigate & Banstead Borough sits. To assess this, we have reviewed previous national and local housing market geography work undertaken and considered the borough's functional relationships with surrounding areas through analysis of house prices, migration flows, travel to work areas, commuting patterns and the borough's spatial relationship with London.

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## 2. National Planning Policy

- 2.1 This section provides an overview of the national planning policy and guidance relating to housing market geographies. The following section reviews previous national and local studies undertaken relevant to Reigate & Banstead's Housing Market Area.
- 2.2 Local planning authorities have a statutory duty to cooperate ('DtC') on strategic cross boundary matters as part of the plan-making process. The National Planning Policy Framework ("NPPF") sets out in paragraph 26 that joint working can address a range of issues, including helping to determine where additional infrastructure is necessary; and whether development needs that cannot be met wholly within a particular plan area could be met elsewhere. It also states that authorities should prepare and maintain one or more statements of common ground, documenting the cross-boundary matters being addressed and progress in cooperating to address these (paragraph 27). Housing provision is a cross-boundary issue in many areas.
- 2.3 The Planning Practice Guidance ("PPG") on *plan making* sets out what a statement of common ground is expected to contain<sup>1</sup>. It also contains guidance on the geographical area that such statements need to cover<sup>2</sup> – setting out that this may be influenced by the strategic matters being planned for; and the most appropriate functional geography to gather evidence and develop policies to address these matters. It identifies that housing market areas and travel to work areas may be an appropriate basis, that authorities may well work in different areas, and authorities should be pragmatic in determining these areas.

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<sup>1</sup> Paragraph: 011 Reference ID: 61-011-20190315

<sup>2</sup> Paragraph: 017 Reference ID: 61-017-20190315

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- 2.4 We recognise that in due course the DtC may be replaced by a new ‘alignment test’ but at the time of writing there is no detail on how this will operate, and what may be required.
- 2.5 Paragraph 61-018-20190315 in the PPG includes specific advice on how housing market areas can be defined. A housing market area is defined as *“a geographical area defined by household demand and preferences for all types of housing, reflecting the key functional linkages between places where people live and work”*.
- 2.6 The PPG sets out that housing market geographies can be broadly defined by analysing:
- The relationship between housing demand and supply across different locations using house prices and rates of change in house prices. This should identify areas that have clearly different price levels compared to surrounding areas.
  - Migration flow and house search patterns. This can help identify the extent to which people move to a new house within an area, in particular where a relatively high proportion of short-distance household moves are contained (due to connections to families, jobs, and schools).
  - Contextual data such as travel to work areas, retail and school catchment areas. These can provide information about the areas within which people move without changing other aspects of their lives (e.g. work or service use).
- 2.7 The PPG, in Para 61-018-20190315, also sets out a range of suggested data sources including ONS internal migration and travel to work area statistics; Land Registry House Price Index and Price Paid Data; data from local estate agents and local newspapers about geographical coverage of houses advertised for sale and rent; DLUHC statistics including live tables on affordability and neighbourhood data from the Census.

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## 3. Review of Previous Studies

- 3.1 There are a number of existing detailed research studies which have considered housing market geographies. This section reviews previous national and local studies relevant to Reigate & Banstead's Housing Market Geography and relevant surrounding authority's approaches.

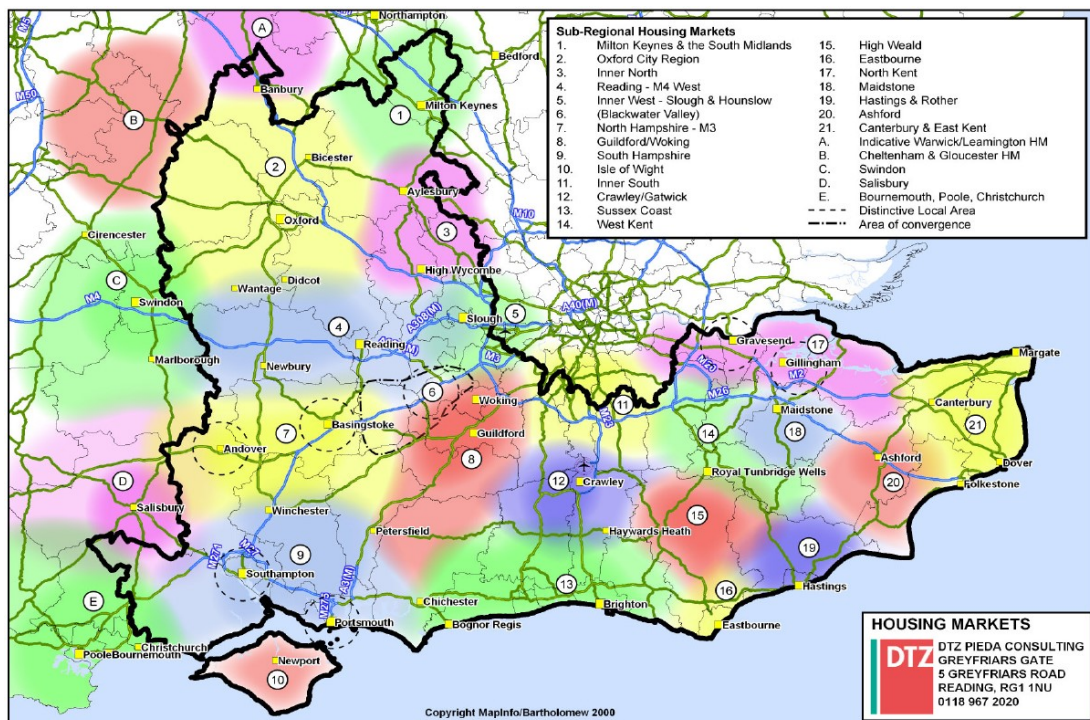
### National Studies

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#### **DTZ Study "Identifying the Local Housing Markets of South East England (2004)**

- 3.2 In May 2004 DTZ Pineda were commissioned by the South East of England Regional Assembly (SEERA) and Homes and Communities Agency to undertake a study to identify the spatial extent of sub-regional housing markets across the whole of the South East Region to inform the South East Regional Housing Board on the strategic pattern of sub-regional housing markets in the region.
- 3.3 The report identified 21 housing market areas across the South East Region based principally on analysis of commuting and migration patterns together with stakeholder engagement. The report highlighted the relationship between housing market and the local economy and the importance of transport infrastructure and accessibility. It revealed that in many instances there are areas which overlap between neighbouring housing market areas.
- 3.4 Reigate & Banstead fell within an **Inner South HMA** which extended to include the south London Boroughs of Croydon, Sutton and Bromley and an area within Surrey stretching from Elmbridge in the west to Tandridge in the East (see Figure 3.1). The report noted that there was some overlap between Mole Valley, Reigate & Banstead and Tandridge with the Crawley-Gatwick Housing Market.

**Figure 3.1 Spatial Delineation of the South East's Sub-Regional Housing Markets**



Source: DTZ Pieda (2004) Identifying the Local Housing Markets of the South East

**CURDS National Research (2010)**

- 3.5 In 2010, the Government commissioned a consortium of academics led by the Centre for Urban and Regional Development Studies (CURDS) at Newcastle University to define housing markets across England.
- 3.6 The study defined a tiered structure of housing markets on a consistent basis across England drawing on commuting and migration dynamics (based on 2001 Census data) and house prices (standardised for differences in housing mix and neighbourhood characteristics). This information was brought together to define a three-tiered structure of housing markets as follows:

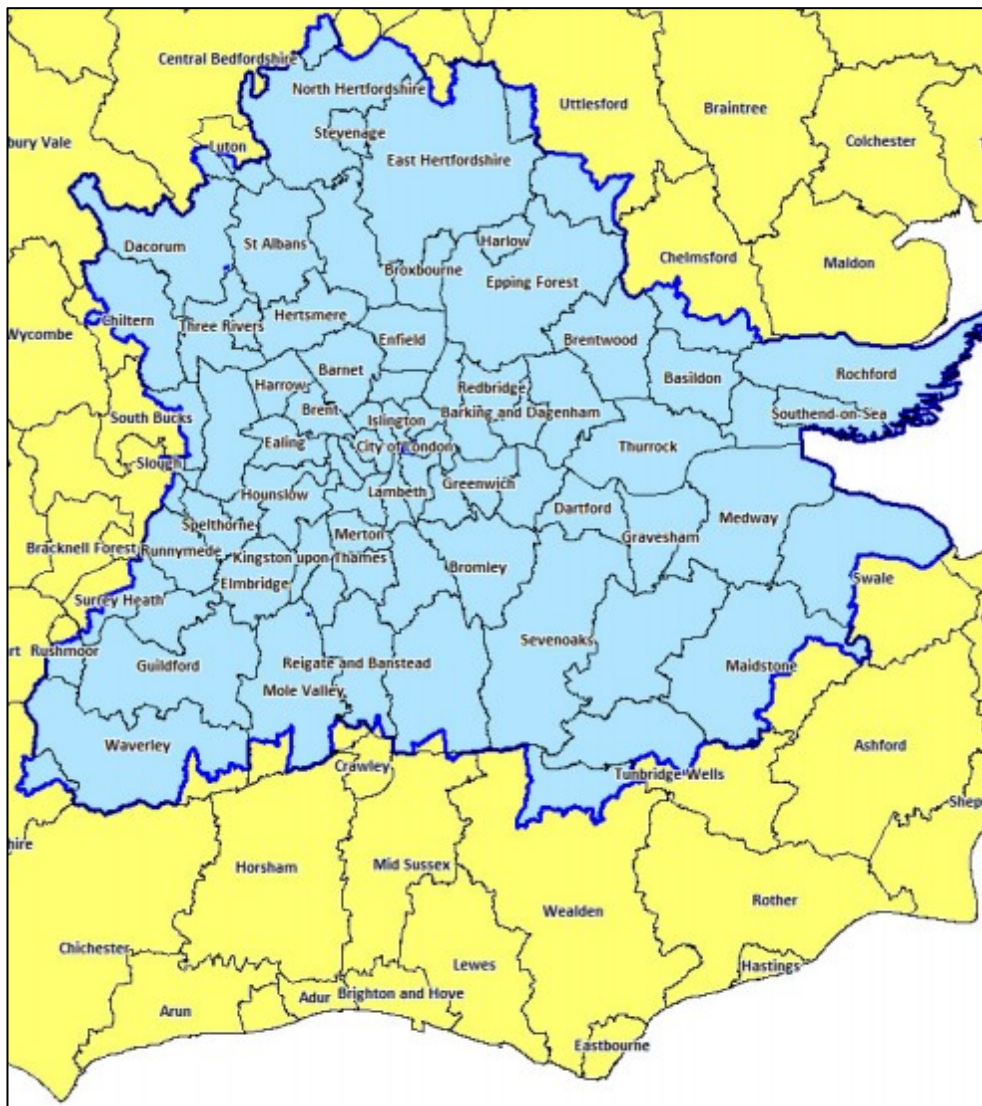
- Strategic (Framework) Housing Markets – based on 77.5% commuting self-containment;



- Local Housing Market Areas – based on 50% migration self-containment; and
- Sub-Markets – which would be defined based on neighbourhood factors and house types

3.7 The Strategic and the Local HMAs were mapped across England, with the local HMAs embedded within the wider Strategic HMAs. The study defined Reigate & Banstead and much of the inner Home Counties within a London Strategic Housing Market Area (as shown below).

**Figure 3.2 London Strategic Housing Market Area**



Source: CURDS (University of Newcastle, 2010)

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- 3.8 The report showed that there is a level of housing market interaction between London and Reigate and Banstead Borough but noted that in major urban areas such as Greater London, the analysis can miss more fine-grained differentiation of multiple housing markets; and that in such areas additional lower-tier geography can reflect more localised housing market conditions.
- 3.9 Based on migration data, the CURDS research went on to define a 'local' South West London HMA which stretched into Surrey to include Epsom & Ewell, Mole Valley, Reigate & Banstead and the western part of Tandridge.
- 3.10 Whilst the CURDS study is useful, not least because it is nationally consistent, it should be borne in mind that the GLA defines Greater London as a single Housing Market Area (albeit recognising that the geographical extent is very sensitive to the self-containment thresholds used) and that it (as with the preceding DTZ evidence) drew largely on 2001 Census data which is now quite dated. Its analysis recognises that HMA boundaries are very sensitive to self-containment thresholds used.

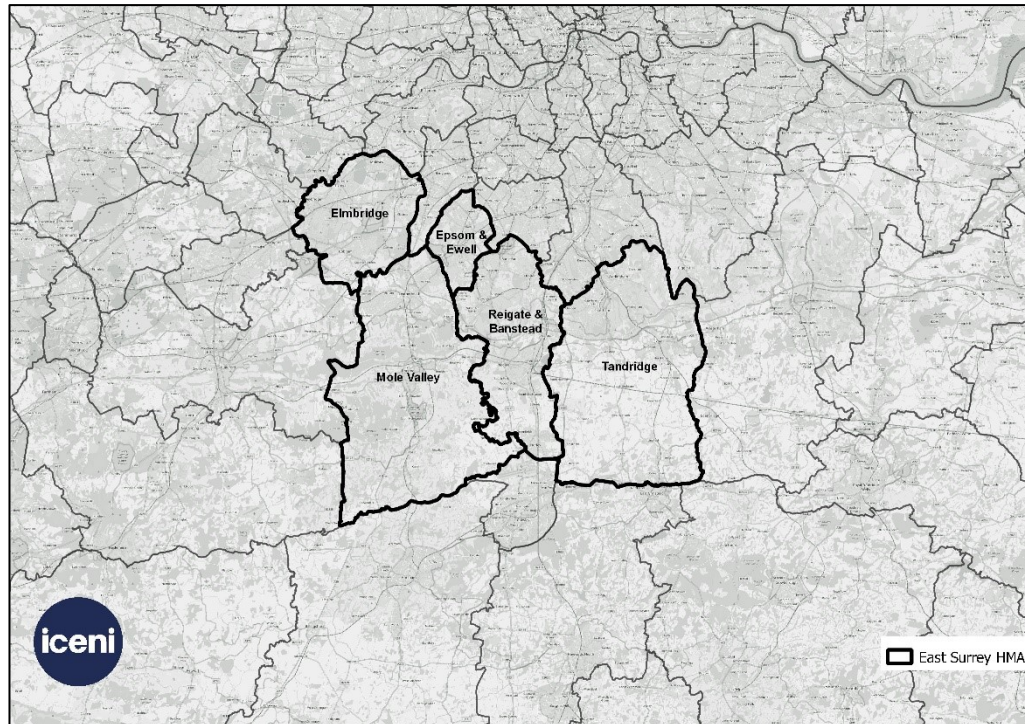
### **Previous Local Evidence**

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#### **East Surrey Strategic Housing Market Assessment**

- 3.11 In 2008, the East Surrey authorities of Elmbridge, Epsom & Ewell, Mole Valley, Tandridge and Reigate & Banstead commissioned a Strategic Housing Market Assessment which essentially took the definition in the 2004 DTZ Pinda study and concluded that these authorities form part of an East Surrey HMA stretching from Elmbridge to Tandridge.

**Figure 3.3 East Surrey Housing Market Area**



Source: IcenI based on East Surrey Housing Market Assessment (DCA, 2008)

- 3.12 The report also recognised relationships between these authorities and London and other adjoining areas. This analysis was based on a review of household migration, contextual data such as travel to work areas, 2001 commuting flows, house prices and rates of change in house prices and a review of evidence which fed into the South East Plan (the DTZ Study).
- 3.13 The data analysed showed a strong correlation between actual housing moves and travel to work patterns in each of the East Surrey districts/boroughs. The report identified a self-containment rate<sup>3</sup> of

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<sup>3</sup> The self-containment rate is the percentage of people who move within the boundary of the authority they currently live in i.e. within Reigate & Banstead.

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56.1% within Reigate & Banstead. This was attributed to the relatively central location of Reigate & Banstead within East Surrey, as well as lower property prices than in neighbouring districts. It is however well below the thresholds we might typically expect for a self-contained HMA (70%+).

- 3.14 The report found that the greatest numbers moving into Reigate & Banstead were from Greater London (2,860 persons) and Tandridge (469 persons). There were also high numbers moving from Reigate & Banstead to Mole Valley (360 persons) and Tandridge (389 persons).

### **Strategic Housing Market Assessment Update (2012)**

- 3.15 An updated Strategic Housing Market Assessment for Reigate & Banstead was prepared in February 2012. This reviewed a number of sections of the existing 2008 SHMA however did not revisit the HMA.

### **Evidence Base in Surrounding Areas**

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#### **Kingston and North East Surrey SHMA**

- 3.16 In June 2016 Cobwebb Consulting produced a SHMA for Kingston upon Thames and the North East Surrey Authorities of Elmbridge Borough Council, Epsom & Ewell Borough Council and Mole Valley District Council. This identified Elmbridge, Epsom & Ewell, Kingston upon Thames and Mole Valley as a coherent and self-contained HMA based principally on strong migration linkages, and supported by evidence on house prices and commuting links.
- 3.17 The report recognised that there were strong linkages with surrounding authorities, particularly to the south of the HMA, but also in other directions, that will need to be taken into account in developing policy.
- 3.18 With regards to migration analysis (analysed flows per 1,000 population), the report identified strong migration links between Epsom

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& Ewell and Reigate & Banstead; and Mole Valley and Reigate & Banstead. Indeed, Mole Valley's strongest migration relationship was with Reigate & Banstead (4.1 per 1,000) and Epsom & Ewell's joint third highest migration link was with Reigate & Banstead (alongside Kingston (4.5 per 1,000) with similarly strong flows between Reigate & Banstead and Sutton (4.1 per 1,000)).

- 3.19 With regards to commuting links, the report identifies strong commuting links between Mole Valley and Reigate & Banstead (6.7% per 1,000 workers).
- 3.20 The Study concluded by suggesting that Mole Valley needs to consider its housing market linkages to the south and east – particularly HMAs associated with economic development in the Gatwick Diamond area.
- 3.21 The Mole Valley SHMA Update published in December 2020 at Appendix 1 did then consider the housing market linkages between the District and the Gatwick Diamond. This exercise concluded that there were “relatively strong gross migration flow” links with Reigate & Banstead but that it was “difficult to discern any other strong drivers of linkage” between the two. The study also suggested that Reigate & Banstead was more closely focussed in housing terms on the Croydon-Reigate-Tandridge HMA than with Mole Valley.
- 3.22 Overall, it was identified that the evidence supported Mole Valley forming part of a different HMA also covering Kingston-on-Thames, Elmbridge and Epsom & Ewell.

### **Epsom & Ewell HEDNA**

- 3.23 In January 2023, Epsom and Ewell Borough Council published a HEDNA prepared by GL Hearn which looks at the HMA. This found that the Borough has relatively low self-containment levels (25%) thus it would not form its own HMA.
- 3.24 The study concluded that the evidence on internal migration, travel to work and house price data suggests an HMA comprising Epsom &

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Ewell, Elmbridge, LB Kingston upon Thames, Mole Valley and Reigate & Banstead.

- 3.25 The study states that this area reflects a self-containment level for internal migration and travel to work of 71% and 49% respectively. The inclusion of Reigate & Banstead in the HMA is a notable addition from the previous 2016 SHMA prepared for the Borough.

### **Northern West Sussex SHMA**

- 3.26 In 2019, Crawley Borough Council and Horsham District Council appointed a consultancy team comprising Iceni, Justin Gardner Consulting and Chilmark Consulting to prepare an update to the Northern West Sussex SHMA.
- 3.27 The analysis showed that the North West Sussex HMA is comprised predominantly of the local authority administrative areas of Crawley, Horsham and Mid Sussex, extending to a lesser degree northwards into the administrative area of Reigate & Banstead. This is in line with the findings of the previous North West Sussex HMA Assessments undertaken by GVA Grimley in 2009 and Chilmark Consulting in 2014 and endorsed in subsequent local plan examinations.
- 3.28 The study recommended that the core focus of joint working on housing issues should remain within the three-authority HMA geography; but that it would be important for the Councils to actively engage with authorities in the Coastal West Sussex HMA and authorities within Surrey to the north through Duty to Cooperate on any cross-boundary issues arising in respect of housing provision.
- 3.29 The study also noted that the growth of the economic hub around Crawley / Gatwick could over time influence the housing market geography for example if / when Gatwick Airport expands (which remains a possibility).



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## **Tandridge Defining the Housing Market Area Technical Paper**

- 3.30 In 2018, Tandridge commissioned Turley to review their housing market area. This Paper identified HMA relationships with Croydon, Reigate & Banstead and Mid Sussex as well as some links with Sutton, Sevenoaks and Crawley (i.e. most of the surrounding areas). This was based on appraisal of migration and commuting relationships, house prices, urban form and wider/surrounding area evidence studies.
- 3.31 The most important housing market relationships identified were with Croydon, Reigate & Banstead and Mid Sussex and it concluded that the evidence pointed to these areas falling within a common HMA.

## **The London SHMA**

- 3.32 The London SHMA produced in 2017 considers London as a single housing market area. It builds upon the previous 2013 Greater London SHMA which also identified London as a standalone housing market area, however, recognised that London's housing market extends beyond London's boundaries but did not seek to specifically define this. Instead at paragraph 2.4 it noted that

*“recent research has sought to identify housing market areas using data on commuting and migration, but the boundaries identified are highly sensitive to the specific level of containment used”.*

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## **Previous Evidence: Summary**

Iceni has reviewed national and local HMA evidence in relation to Reigate & Banstead's past housing market area evidence.

Previous national studies such as the DTZ's 'Identifying the Local Housing Markets of South East England (2004) and the CURDS National Research (2010) identifies particularly strong links between Reigate & Banstead and Mole Valley; and Reigate & Banstead and Tandridge, however, whilst useful in understanding the basis for relationships between Reigate & Banstead and areas elsewhere, they are based on 2001 commuting flows and are therefore somewhat dated.

Reigate & Banstead's past Housing Market Area evidence points to the borough being within an East Surrey Housing Market Area, however this largely adopts the definition in the DTZ 'Identifying the Local Housing Markets of South East England (2004) report and is again based on 2001 commuting flows, therefore somewhat dated.

The more recent, existing evidence base for surrounding authorities points to a complex set of inter-relationships with areas across Surrey, and between these areas and Greater London. The evidence base for Tandridge identifies Reigate & Banstead as falling within a common HMA with the District alongside Croydon and Mid Sussex. The evidence base for Mole Valley identifies the strongest migration and commuting relationships with Reigate & Banstead. The North West Sussex evidence base also suggests links between the southern parts of Reigate & Banstead to the northern parts of West Sussex (and in particular Crawley).



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## 4. Review of Latest Evidence

- 4.1 This section seeks to objectively reviews evidence to assess the housing market geography and to understand functional relationships with other areas.
- 4.2 It builds upon the detailed research which has been prepared previously and reviews house price geography, migration trends, travel to work and commuting patterns and the spatial relationship between the borough and London's Housing Market. The section draws on data from the 2011 and 2021 Censuses, ONS and the HM Land Registry.

### House Price Geography

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- 4.3 The PPG<sup>4</sup> suggests that housing market areas should have an element of commonality in respect of the relationship between housing demand and supply when compared with other areas. The analysis of house price levels enables the identification of areas which have notable price levels and changes compared to surrounding areas. The findings provide information about the differences across the region in terms of the price people pay for similar housing, market hotspots, low demand areas and volatility.
- 4.4 In order to examine the house price geography, we have analysed the median house prices across Reigate & Banstead and surrounding authorities for the monitoring period 1<sup>st</sup> January 2022 – 31<sup>st</sup> December 2022 to align with the latest ONS release<sup>5</sup>.

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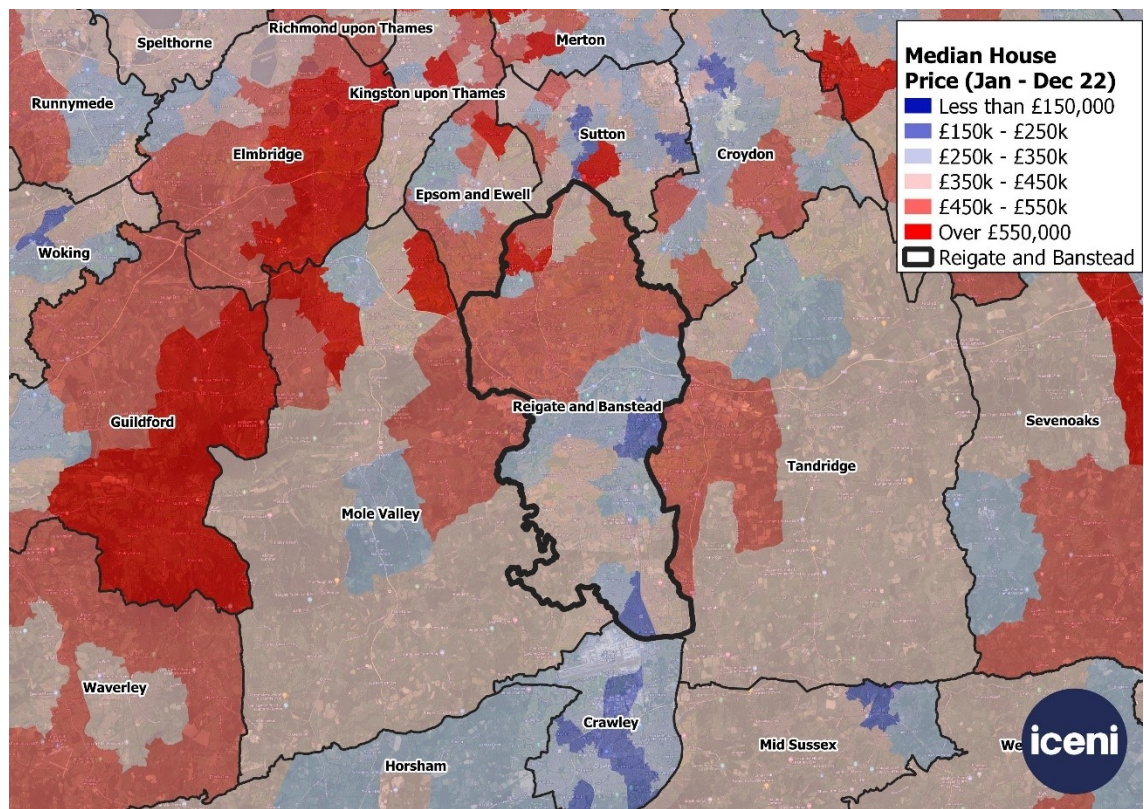
<sup>4</sup> Paragraph: 018 Reference ID: 61-018-20190315

<sup>5</sup> Median house prices for administrative geographies: HPSSA dataset 9

4.5 This shows that the house price geography tends to operate at a number of different tiers. At a regional level, areas nearer to London and the areas in neighbouring authority areas with strong transport links tend to have higher house prices. At a sub-regional level, house prices are typically higher towards the north and west of Surrey, in Elmbridge and Guildford in particular. House prices are typically lower towards the south and east, particularly to the south of Reigate & Banstead and Tandridge.

4.6 At a more local level, the Figure below shows that there are notable house price differences between the north and south of Reigate & Banstead borough. The north of the borough beyond the M25 has a stronger relationship with Epsom & Ewell and the north of Mole Valley in house price terms; whereas the southern part of the borough relates more to Crawley and parts of Tandridge. The Figure also shows a particular concentration of higher values in the Kingswood area; however, this is influenced by the higher number of transactions for detached properties.

**Figure 4.1 Median House Prices, Year to December 2022**



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Source: HM Land Registry and Icen. Analysis by Lower-layer Super Output Areas

4.7 In addition to the mapping of house price geography we have reviewed the latest data on house prices at a local authority level published by ONS to December 2022. We have examined housing costs across the Gatwick Diamond authorities in the Table below.

**Table 4.1 Median House Prices, Year to December 2022**

	All Sales	Detached	Semi-Detached	Terraced	Flat
Crawley	£331,000	£555,000	£391,000	£334,250	£225,000
Croydon	£430,000	£781,250	£550,000	£445,000	£285,000
Epsom & Ewell	£575,000	£875,000	£647,500	£515,000	£325,000
Horsham	£437,000	£685,000	£450,000	£372,250	£235,000
Mid Sussex	£430,000	£655,000	£445,000	£375,000	£235,000
Mole Valley	£568,750	£923,000	£585,000	£450,000	£280,000
Reigate & Banstead	£485,000	£880,000	£525,000	£450,000	£272,750
Sutton	£457,500	£885,000	£615,000	£475,000	£290,000
Tandridge	£500,000	£850,000	£500,000	£421,750	£282,000

Source: ONS House Price Data

4.8 The analysis in the Table above brings out the following key points:

- House prices across all types are highest in Epsom & Ewell (£575,000) and Mole Valley (£568,750). These areas include strong ‘commuter town’ locations with significant commuting levels to London facilitated by frequent railway services to key central London locations;
- This is followed by Tandridge (£500,000) and Reigate & Banstead (£485,000); with sales values of £850,000 and £880,000 for detached properties respectively and £500,000 to £525,000 for semi-detached properties respectively in these areas which are clearly similar;

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- Values for detached properties in Reigate & Banstead (£880,000) are also notably similar to those in Sutton (£885,000), Epsom & Ewell (£875,000) and Mole Valley (£923,000).
  - The prices for flatted developments in the borough (£272,750) are broadly similar with those in Croydon (£285,000), Tandridge (£282,000), Mole Valley (£280,000) and Sutton (£290,000); and
  - The lowest house prices are in the districts/boroughs of Mid Sussex and Croydon and to a greater extent in Crawley; with the latter drawing the lowest values across each type.

4.9 We have also looked at house price changes in absolute terms over the last 10 years (2012-22). This provides essentially a picture of the degree of change in house prices since the early stages of recovery following the economic downturn through to the period post COVID-19. This shows that, in general, the greatest growth in overall house prices has been in those areas with the highest absolute values, including Epsom & Ewell, Tandridge, Reigate & Banstead, Mole Valley, Croydon and Sutton.

4.10 House prices in Reigate & Banstead have seen absolute price growth of £210,000 across all housing types over the period of 2012 to 2022 (equal to 76% growth). In absolute and percentage terms, prices of detached properties in Reigate & Banstead have seen the greatest increase across all authorities except the London Borough of Sutton with an increase £380,000 and 76% respectively.

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**Table 4.2 Median House Price Change, 2012-22 (%)**

	<b>All Sales</b>	<b>Detached</b>	<b>Semi-Detached</b>	<b>Terraced</b>	<b>Flat</b>
Crawley	£143,500	£220,000	£171,000	£151,250	£80,000
Croydon	£200,000	£341,250	£255,000	£217,500	£120,000
Epsom & Ewell	£257,250	£355,025	£312,500	£215,050	£108,000
Horsham	£164,000	£267,500	£185,000	£151,775	£90,750
Mid Sussex	£180,000	£265,000	£185,000	£150,050	£75,000
Mole Valley	£196,750	£352,500	£233,000	£166,250	£85,000
Reigate & Banstead	£210,000	£380,000	£231,500	£208,500	£94,775
Sutton	£217,500	£385,000	£305,000	£225,050	£117,500
Tandridge	£215,000	£350,050	£220,000	£171,750	£101,000

Source: ONS House Price Data

- 4.11 Over the last five year period (which covers the COVID-19 pandemic and Brexit), the highest absolute price growth for all types can be seen in Epsom & Ewell followed by Sutton and Reigate & Banstead although there is more variation when this is considered by property type.
- 4.12 In Reigate & Banstead, as shown in Table 4.3, the highest house price growth can again be seen for detached properties – notably higher than for the districts/boroughs in proximity to central London (Epsom & Ewell, Sutton and Croydon) at an increase of £240,000. This is likely to have been driven in part by the increased demand for larger properties and more space during the COVID-19 pandemic with an increase in outward migration from more central areas including London.

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**Table 4.3 Median House Price Change, 2017-22**

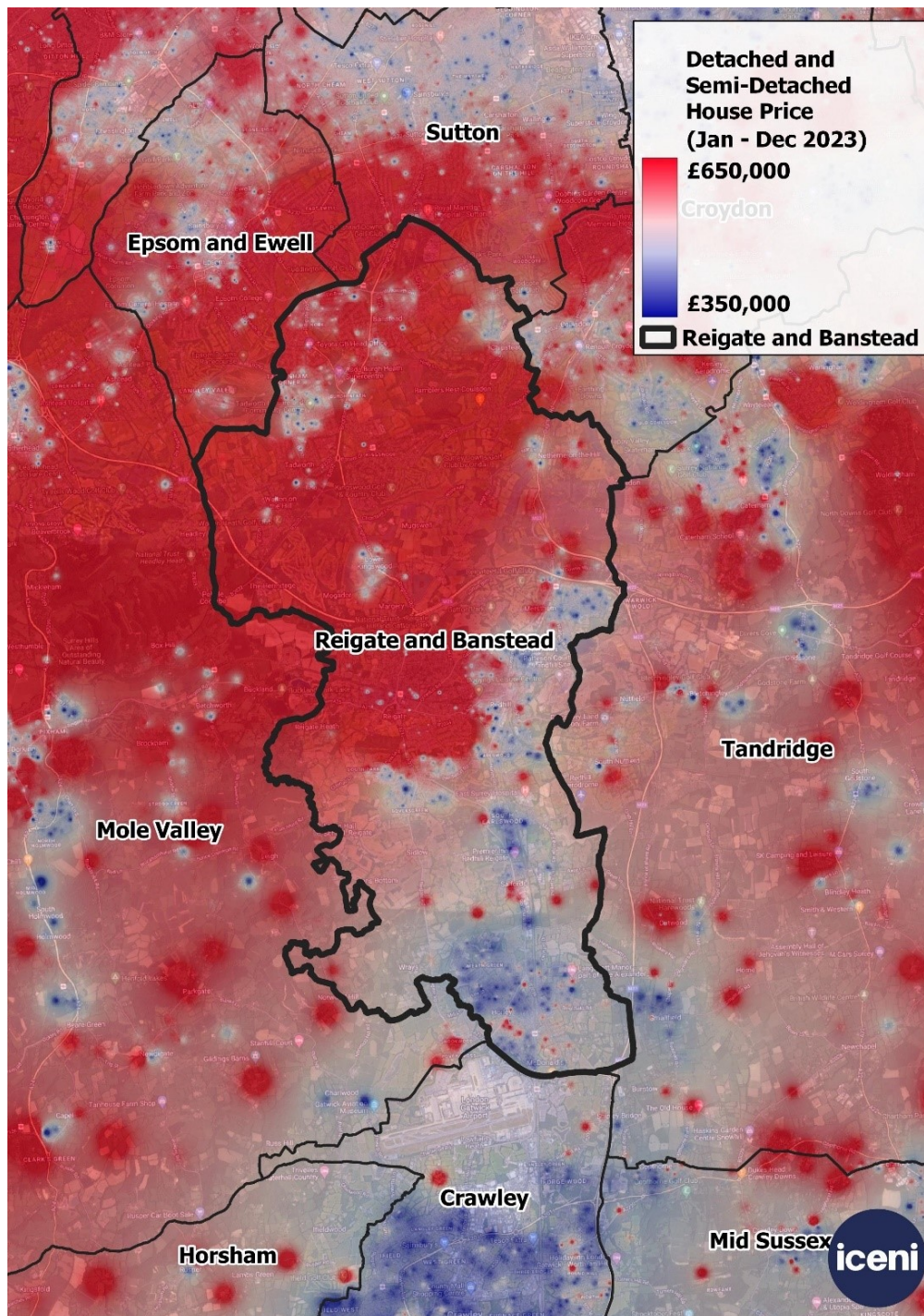
	All Sales	Detached	Semi-Detached	Terraced	Flat
Crawley	£46,000	£97,500	£51,000	£54,250	£7,000
Croydon	£65,000	£131,300	£70,000	£60,000	-£6,000
Epsom & Ewell	£104,750	£115,000	£102,500	£75,000	£14,500
Horsham	£65,000	£125,000	£80,000	£54,750	£7,500
Mid Sussex	£64,000	£95,000	£72,000	£60,000	£10,000
Mole Valley	£68,750	£152,000	£90,005	£50,050	£0
Reigate & Banstead	£90,000	£240,000	£95,000	£83,750	£7,750
Sutton	£92,500	£185,000	£115,000	£80,000	£5,525
Tandridge	£80,000	£163,460	£75,000	£71,750	£2,000

Source: ONS House Price Data

- 4.13 In order to look at a finer grain than the district/borough level, we have considered median house price data; which helps to identify differences in terms of the price people pay for similar housing; and helps identify the spatial extent of smaller, more local sub-markets. To provide a comparison of like-for-like, we have considered values for 'detached' and 'semi-detached' properties (i.e. non-terraced homes).
- 4.14 Figure 4.2 shows that prices for non-terraced homes are generally higher in the north of the borough than the south, with higher values in particular in Banstead and Walton on the Hill. There are also particularly high values in the centre of the borough around Reigate. Values in these areas are at or above £650,000 for non-terraced home. Lower values of around £350,000 are evident in Horley, Salfords and Merstham. There is a clear relationship in house price terms between the north of the borough and Reigate with Epsom & Ewell and parts of Greater London; set against the south of the borough (and Redhill along with Merstham) which is more comparable to Crawley.



**Figure 4.2 House Price Geography for Detached and Semi-Detached Properties**



Source: HM Land Registry and Icen

- 4.15 The higher house price areas in the borough around Reigate, Banstead and Walton on the Hill are broadly similar with prices in a number of the key town and village hotspots (values in excess of £650,000) in the neighbouring authorities including Dorking (Mole Valley) and Oxted

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(Tandridge); as well as Stoneleigh (Epsom & Ewell), Purley (Croydon); Cheam and areas to the south of Central Sutton (Sutton) which all sit within or on the fringe of Greater London.

- 4.16 House prices for non-terraced homes towards the south of Reigate & Banstead, including around Horley and Salfords, are typically lower (around £350,000) which are similar with those towards the centre and south of Crawley; around Handcross and Staplefield. Comparisons can also be drawn between Redhill and towns including Caterham (Tandridge) and parts of Dorking and Leatherhead (Mole Valley).



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## House Prices: Summary

At the regional level, house prices are generally higher in areas in closer proximity to London and major transport links. In the borough, house prices are generally higher towards the north of the district beyond the M25 and are similar to those in Epsom & Ewell, Croydon and Sutton; however, it is recognised this is partly influenced by the character of properties within these areas (i.e. a greater proportion of detached properties in the north of the borough). At a borough/district level, there are similar house prices across all types between Reigate & Banstead, Tandridge and Sutton and also with Mole Valley to a lesser extent.

In consideration of house prices across the borough, there are clear house price differences between the north and south of the borough; with prices in the north and centre of the borough (in particular around Banstead, Walton on the Hill and Reigate) substantially higher than in the south, around Horley and Salfords.

A review of like-for-like prices for non-terraced properties across the borough has identified relationships between Banstead and Walton on the Hill in the north of the borough with neighbouring towns and villages in Mole Valley, Epsom & Ewell and Sutton. Conversely, the same exercise has identified relationships with lower value areas to the south such as Horley with towns and villages in Tandridge and Crawley.

## Migration Flows

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- 4.19 Analysis of migration flows is particularly useful in determining the extent to which residents move within an area, particularly in instances where a relatively high proportion of household moves are contained

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(which may indicate connections to family, employment and education opportunities).

- 4.20 The latest migration flow data available from the ONS relates to the period from mid-2019 to mid-2020 and shows flows between local authority districts and the data therefore picks up the first wave of national lockdowns relating to COVID-19. For robustness, an average of migration data between mid-2017 to mid-2020 has been taken and used for this assessment to even out any year-on-year variations.
- 4.21 The largest migration in-flows to Reigate & Banstead are from the London Boroughs of Sutton and Croydon. However, whilst understanding the places people are moving from is important in understanding demand for housing in Reigate & Banstead; Icenii consider that for the purposes of considering housing market geographies it is preferable to consider gross (two-way) flows expressed per 1,000 head of combined population.
- 4.22 This approach allows consideration of the strength of a relationship between areas, given that two areas with a larger population in proximity to one another would be expected to have a stronger flow than two less populous areas. The Table below sets out the gross migration flows on this basis.

**Table 4.4 Gross Migration Flows for Reigate & Banstead, 2017-20 (average)**

No.	Gross Migration Per 1,000	Flow	In Migration	Flow	Out-Migration	Flow
1	Tandridge	4.58	Sutton	971	Tandridge	544
2	Mole Valley	3.87	Croydon	851	Crawley	518
3	Sutton	3.61	Tandridge	544	Mole Valley	510
4	Epsom & Ewell	3.46	Epsom & Ewell	516	Croydon	353
5	Crawley	3.22	Mole Valley	405	Horsham	322
6	Croydon	2.24	Merton	371	Sutton	318
7	Horsham	1.42	Crawley	325	Epsom & Ewell	280
8	Mid Sussex	1.30	Wandsworth	248	Mid Sussex	251

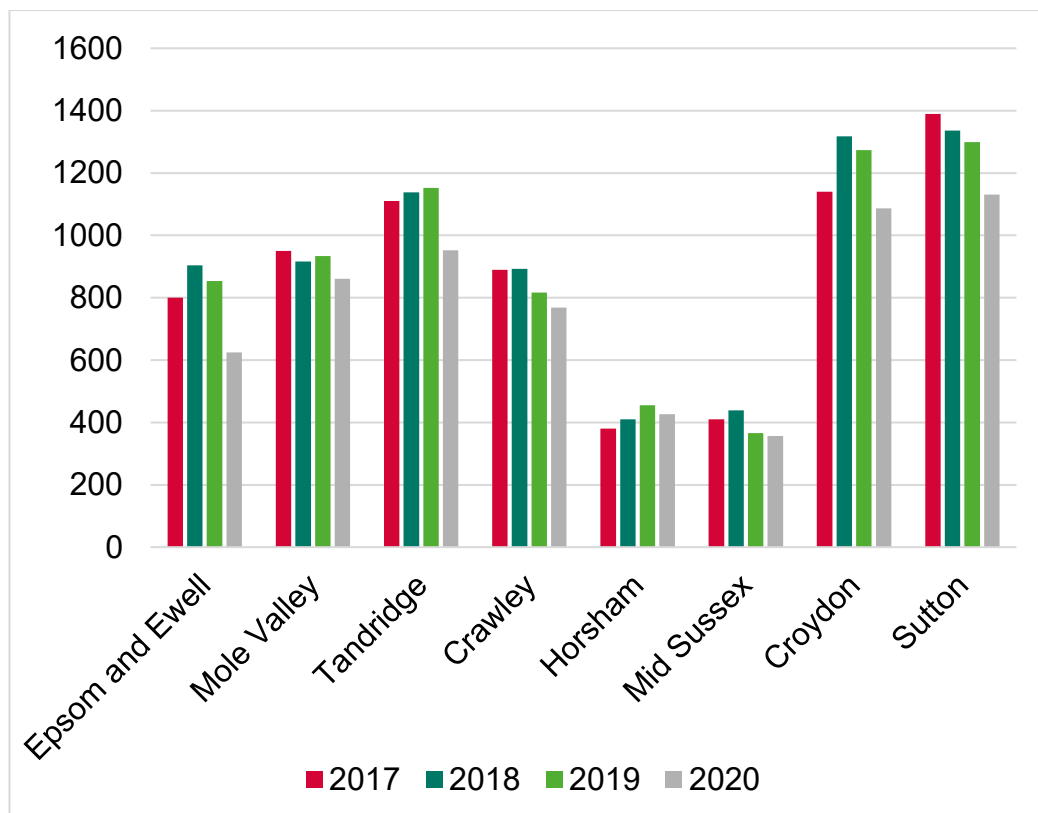
Source: ONS Internal Migration Matrices

- 4.23 The analysis shows that the strongest migration relationship is between Reigate & Banstead and Tandridge (flows of 4.6 per 1,000) which is slightly stronger than was shown in the 2016 Kingston and North East Surrey SHMA. This is stronger than the next largest flows which are between Reigate & Banstead and Mole Valley (3.9 per 1,000) and Reigate & Banstead and Sutton (3.6 per 1,000) and Reigate & Banstead and Epsom & Ewell (3.5 per 1,000). These authorities form the northern most part of the Gatwick Diamond and each of these relationships are significant.
- 4.24 Aside from the relatively strong migration flows between Tandridge, Mole Valley, Epsom & Ewell and Sutton; there are also reasonably strong links with Crawley as well as the Outer London Borough of Croydon.
- 4.25 Surrey's location in proximity to London has an influence on migration patterns within the area. There are relatively strong links between the north and east Surrey authorities and the south London boroughs; particularly Croydon and Sutton. For example, as more people migrate

to Reigate & Banstead from London, this in turn has an impact on migration patterns between Reigate & Banstead and other neighbouring authorities (for example Mole Valley) as people move further into Surrey.

4.26 In order to consider how the HMA has evolved and could evolve going forward, the Figure below sets out how gross migration flows between Reigate & Banstead and other neighbouring authorities have changed between 2017 and 2020.

**Figure 4.3** Gross Migration Flows between Reigate & Banstead and Neighbouring Authorities, 2017-20



Source: ONS Internal Migration Matrices

4.27 As is clear from Table 4.4 above, Reigate & Banstead and Tandridge have the strongest migration relationship (per 1,000) of the authorities considered with Figure 4.3 showing that the relationship also strengthened over the three years before the COVID-19 pandemic resulted in a downward trend. Migration flows between Reigate & Banstead and Mole Valley decreased slightly over the three year period

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before COVID-19; however, the relationship has remained strong overall.

4.28 In respect of migration patterns with the outer London boroughs, flows between Reigate & Banstead and Sutton declined steadily between 2017 and 2020 whereas the relationship with Croydon moved in the opposite direction becoming stronger.

4.29 Flows between Reigate & Banstead and Crawley and Mid Sussex declined whereas the relationship with Horsham strengthened which could in part be due to the high volume of development in Horsham in recent years.

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## **Migration Flows: Summary**

The strongest migration relationships are between the northern-most Gatwick Diamond authorities, i.e. Reigate & Banstead and Tandridge; Mole Valley; Epsom & Ewell and Sutton. Reigate & Banstead also has relatively strong migration links with the outer London Borough of Croydon as well as Crawley and Horsham.

London has also influenced migration patterns within the wider Surrey area. The strongest links are between the north and west Surrey authorities and the Outer London Boroughs, but this has a knock-on effect on migration within Surrey itself.

The relationship between Reigate & Banstead and Tandridge was strengthening before the COVID-19 pandemic whereas flows between Mole Valley declined slightly. The relationship between Reigate & Banstead and the outer London borough of Croydon has become stronger (excl. COVID-19 impact) in the last three years whereas the relationship with Sutton weakened.

In addition, flows between Reigate & Banstead and Crawley and Mid Sussex declined whereas the relationship with Horsham strengthened.

## **Commuting**

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- 4.33 Icení has also reviewed Travel to Work Areas (“TTWAs”) and Commuting Patterns in order to inform future engagement with neighbouring authorities on cross-boundary issues of housing needs and supply.
- 4.34 TTWAs are useful in understanding housing market geographies as they provide information about the areas within which people move

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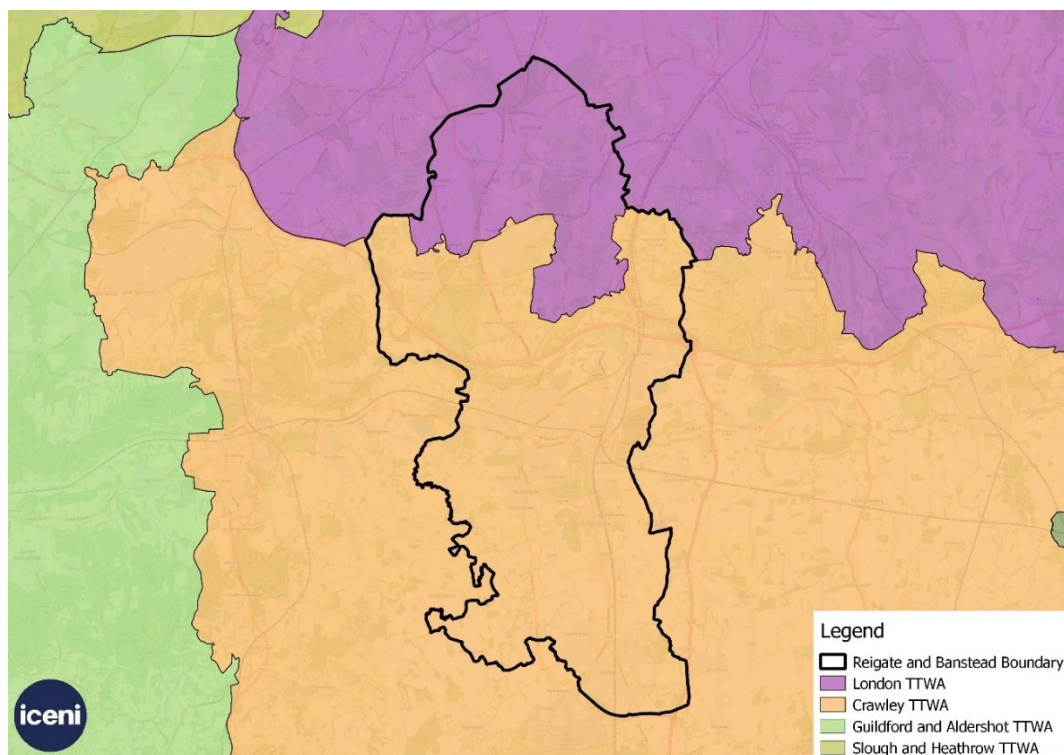
without changing other aspects of their lives. Similarly, as indicated within the PPG, commuting patterns are useful as they provide information in relation to the spatial structure of the labour market, which is likely to influence household locations. They also provide information about the areas within which people are likely to move without changing employment.

### **Travel to Work Areas (TTWAs)**

- 4.35 As stated above, TTWAs are useful in understanding housing market geographies as they provide information about the areas within which people move without changing other aspects of their lives. In 2015, the ONS defined TTWAs using 2011 Census data. It is therefore likely to be sometime before we see TTWAs using 2021 Census data.
- 4.36 For the 2011 Census-based TTWAs, the defining criteria were that at least 75% of an area's resident workforce should work in the area, and at least 75% of the people who work in the area should also live there. The area should also have a working population of at least 3,500. For areas with a working population in excess of 25,000, lower self-containment rates of 66.7% were necessary.
- 4.37 TTWAs have tended to change significantly over time, and the areas to be identified from 2011 Census data differ substantially from those identified in 2001, especially in and around London. Changes to TTWA boundaries result from the interplay of many different shifts in the complex patterns of commuter flows, rather than exclusively from changes in the number and location of jobs. The trend in successive Censuses has been for TTWAs to become larger as the volume of longer distance commuting increases. In 2011 there were 228 TTWAs across the UK, compared to 243 in 2001, 308 in 1991 and 344 in 1981.
- 4.38 The 2011 ONS TTWA define Merstham, Redhill, Reigate and Horley as falling within a Crawley-focused TTWA, with the northern part of the borough (essentially north of the M25) within a London TTWA.

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- 4.39 The London TTWA is one of the largest TTWAs in the South East, covering the majority of the London boroughs as well as parts of north west Kent, Essex and northern parts of Surrey, including Banstead.
- 4.40 The Crawley TTWA is located to the south of the London TTWA and extends southwards from the M25 to include the settlements of Dorking, Redhill, Horley, East Grinstead, Horsham, Haywards Heath and Burgess Hill. The relevant TTWAs are shown in the Figure below.

**Figure 4.4 ONS 2011-based TTWAs**



Source: 2011 Census

### **Commuting Patterns**

- 4.41 Commuting patterns are also useful in providing information about the areas within which people are likely to move without changing employment.
- 4.42 This section draws on 2011 and 2021 Census data. This is because of the impact on the COVID-19 pandemic on the position on Census day in 2021 when there was Covid-19 lockdown was in place which affected working patterns. The impact of this can be seen by the significant



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increase in all usual residents in employment reporting that they work mainly at or from home, with this being just 11.9% in 2011, and 42% in 2021 – a 273% increase, compared to the 6% increase in the total of usual residents in employment overall in the Borough. The total volumes of commuters and the relationships between areas will have been significantly different between the periods as a result of the pandemic.

- 4.43 Drawing on data from the 2011 Census; we note that 35,925 working residents aged 16 and over in Reigate & Banstead travelled outside the Borough for employment - principally to Crawley (4,735), Mole Valley (3,452) and Sutton (2,743). On the other hand, 32,536 working residents commuted into Reigate & Banstead for employment – principally from Tandridge (3,537), Croydon (3,489) and Crawley (3,468).
- 4.44 The 2021 Census on the other hand saw 19,204 of all working residents aged 16 and over in Reigate & Banstead travelled outside of the Borough for employment – principally to Crawley (2,176), Mole Valley (2,126), and Sutton (2,044). On the other hand, 18,840 working residents travelled into Reigate & Banstead for employment – principally from Crawley (3,053), Tandridge (2,327), and Croydon (2,226).
- 4.45 In comparing the 2011 Census and 2021 Census data, there are clearly greatly reduced levels of commuter flows both in and out of the Borough in the latter dataset. As discussed above whilst there has been growth in home or hybrid working, the 2021 Census position is likely to have been particularly influenced by the COVID-19 lockdown. Given the rebound in rail passenger numbers at stations throughout Reigate and Banstead from 2020/2021 to 2022/2023, it is reasonable to assume that the low figures recorded by the 2021 Census for commuter flows have since increased and would be higher if the Census was taken at the

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time of writing.<sup>6</sup> Despite this, it is clear that a strong relationship with Crawley remains as a result of the proximity of Gatwick Airport and its continued (albeit scaled back) operations during the pandemic.

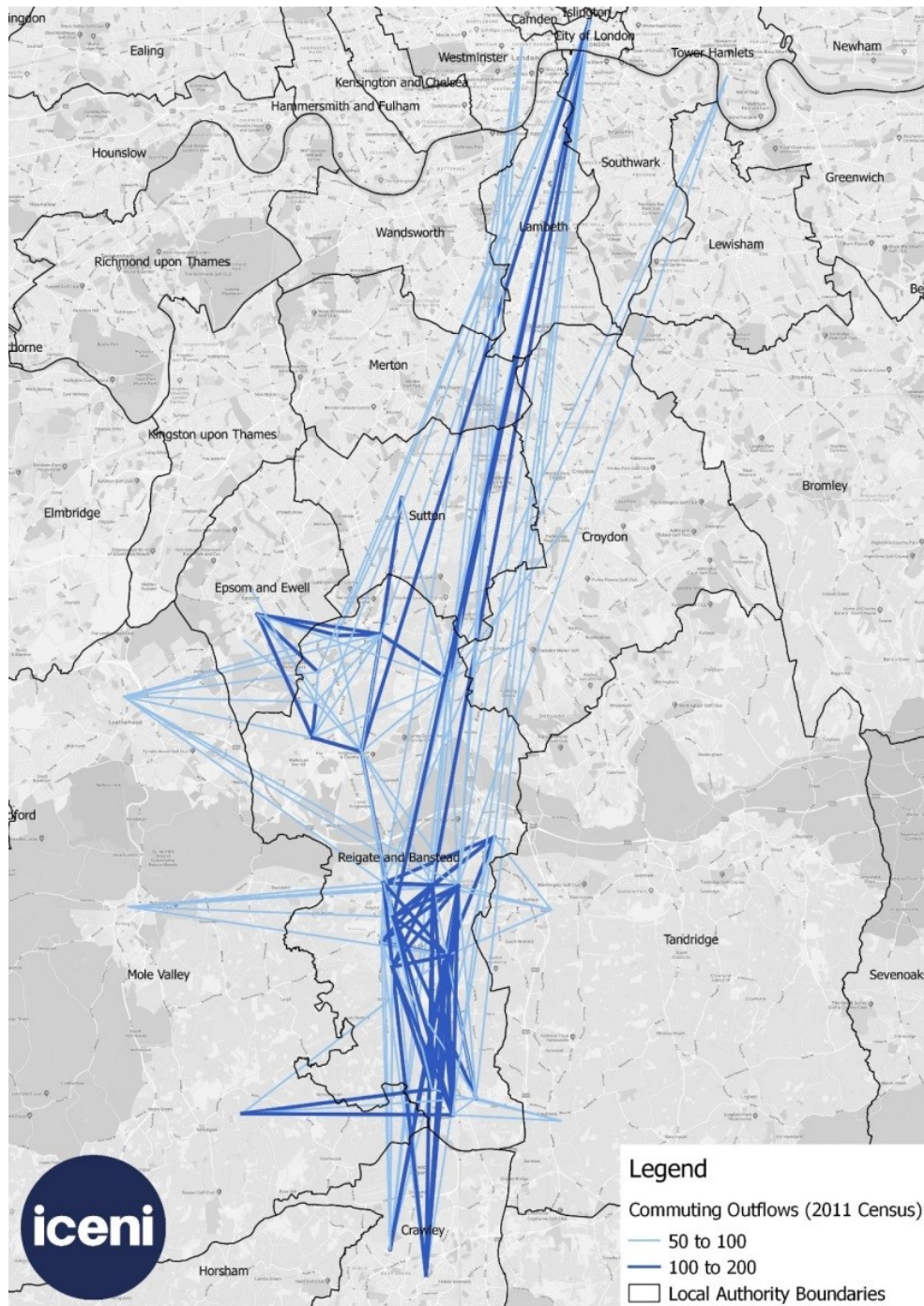
- 4.46 As a result of the level of out-commuting, in 2011, the borough was a net exporter of labour and has a self-containment rate of 49.9% which has fallen from the 2001 Census as considered in the East Surrey SHMA of 2008 at 56.1%. As per the 2021 Census, this containment rate was much higher than in 2011 at around 75%, owing to the increased level of working from home.
- 4.47 Net out-commuting is influenced by the concentration of higher wage employment and employment opportunities in Central London.
- 4.48 Diving further into the detail at a more local level, we have reviewed where people are travelling to and from for employment utilising middle-layer super output areas (MSOAs)<sup>7</sup>. The results of this across the borough looking outward to other MSOAs is shown in the Figure below.

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<sup>6</sup> <https://dataportal.orr.gov.uk/statistics/usage/estimates-of-station-usage> Office of Rail and Road Table 1415 - Time series of passenger entries and exits and interchanges by station

<sup>7</sup> Middle-layer Super Output Areas (MSOAs) are geographic areas built from contiguous Lower-layer Super Output Areas (LSOAs). The minimum population for these areas is 5,000 persons.

**Figure 4.5 Reigate & Banstead Outflows of 50-200**



Source: 2011 Census

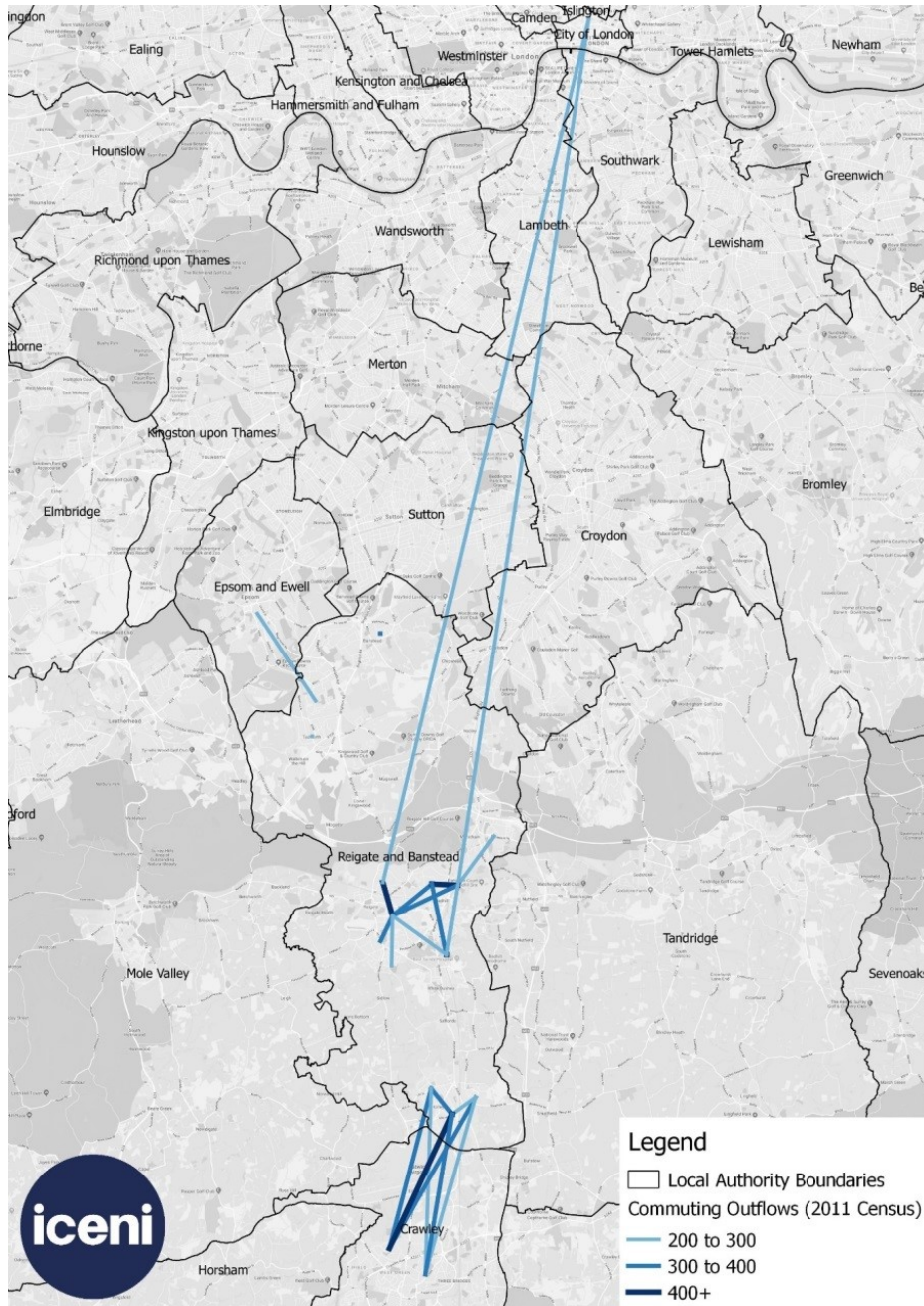
4.49 The analysis shows a clear distinction across the borough between the north, central area and south of the borough in respect of out-commuting flows. The north of the borough around Banstead has a strong relationship with Epsom and central Sutton. The central area of the borough around Reigate and Redhill has a strong relationship with

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the Central London and Crawley town as well as relationships with Dorking and Leatherhead; and the south of the borough has a strong relationship with Crawley (particularly the area around Gatwick Airport and the Manor Royal Business Park which is a significant employment location benefitting from strong connections to London and the wider South East) and the south-eastern villages of Mole Valley.

4.50 If we focus on outflows of 200 or more only; we can identify a stronger distinction between the north, south and central area of the borough and the respective relationships are clearly defined. This is shown in the Figure below.

**Figure 4.6 Reigate & Banstead Outflows of 200 or more**



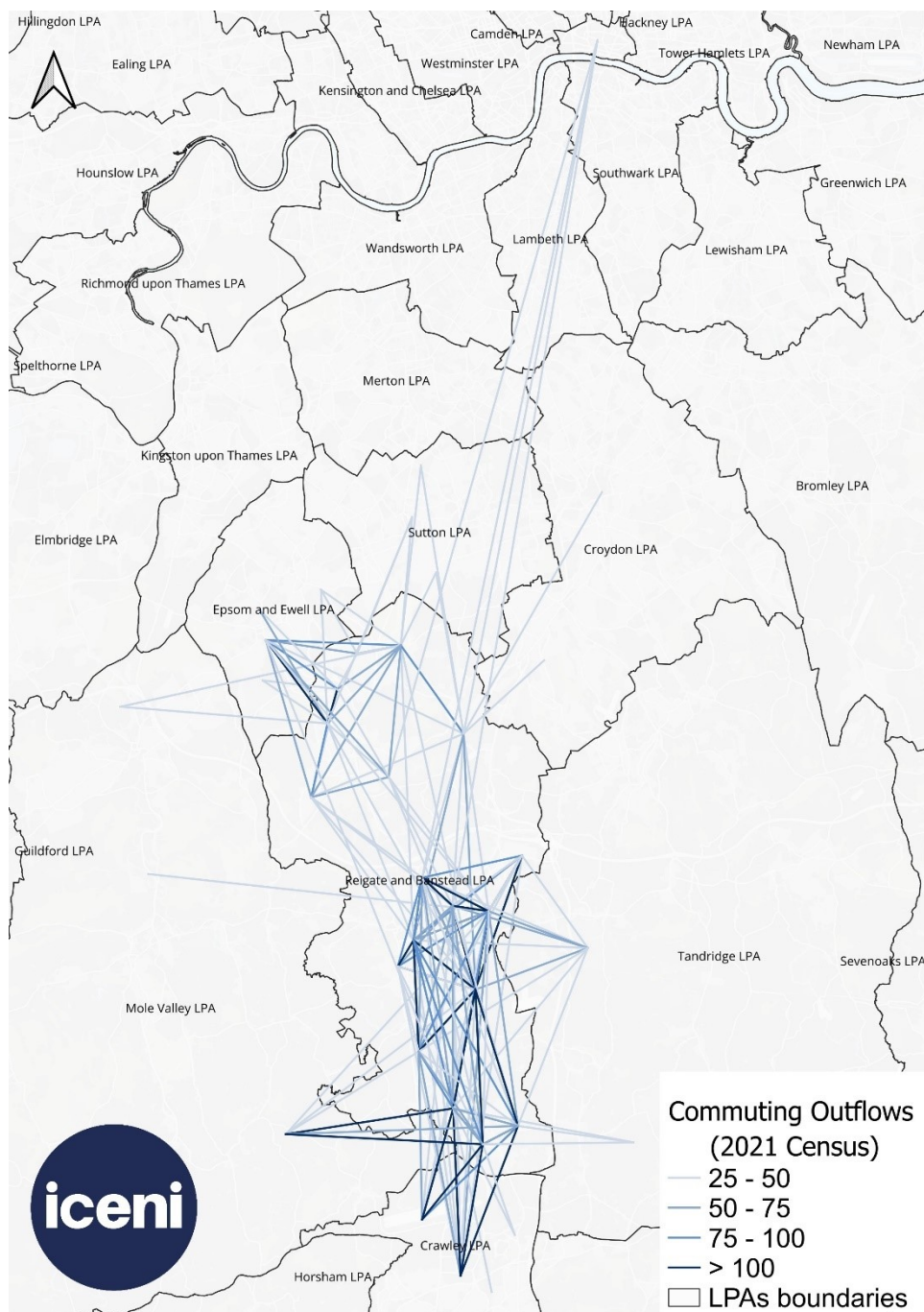
Source: 2011 Census

4.51 The 2021 Census reflects a similar pattern of outflows as the 2011 Census data, as shown by Figure 4.7 below. In 2021, there remained a strong distinction in the patterns and directions of outflows between the north and south of the Borough, but with the highest rates of out-commuting occurring between MSOAs within the Borough. It is also clear that a level of out-commuting from the Borough to London remained in 2021, however, these were at significantly lower rates



when compared to 2011 for the reasons described. In the south of the Borough, there remained strong levels of out-commuting to Crawley and the southeast of Mole Valley. In the north of the Borough, there were strong levels of out-commuting to Epsom and Ewell in 2021, and there remained some levels of out commuting to Sutton and Croydon from the north, similar to 2011.

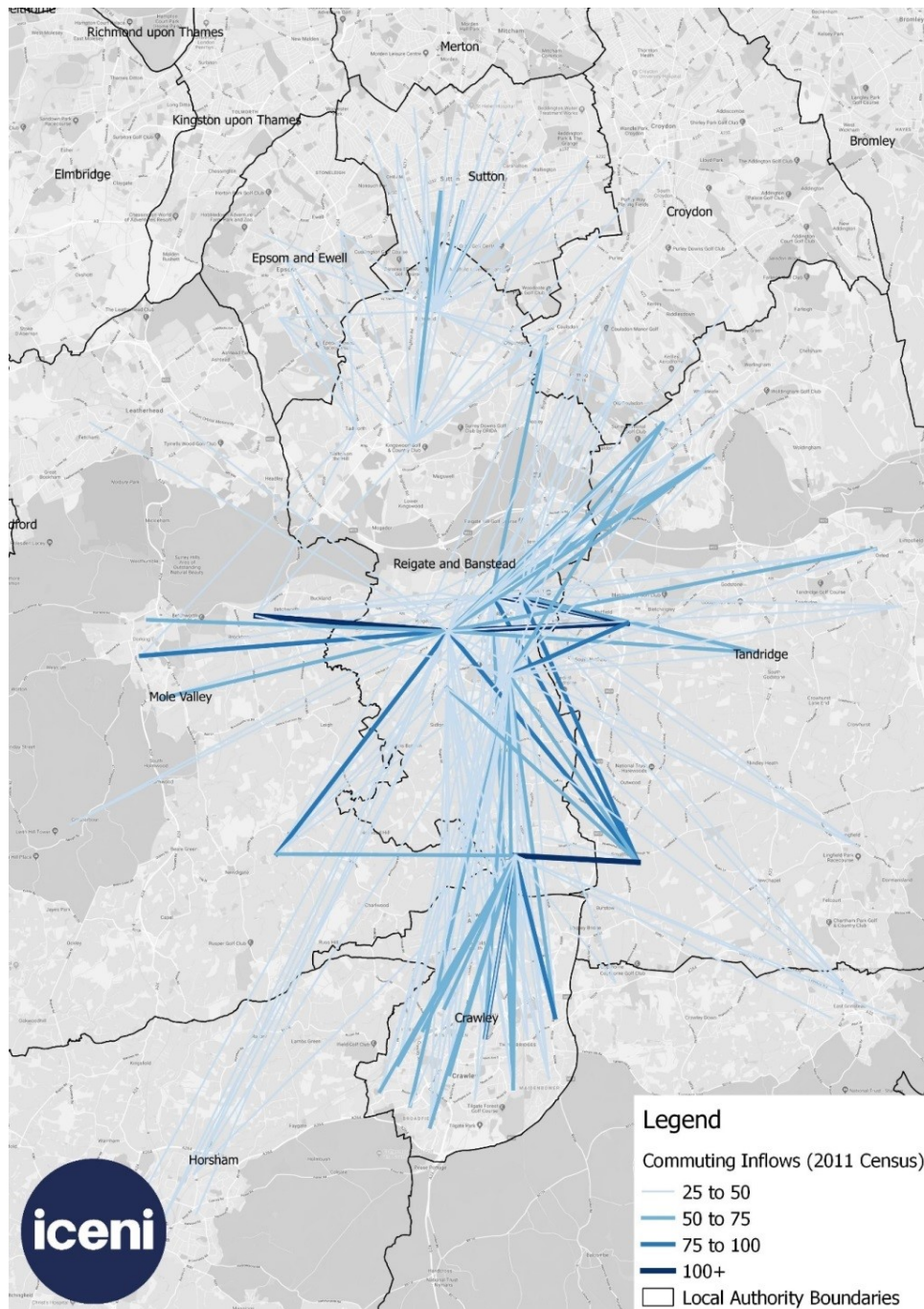
**Figure 4.7 Reigate & Banstead Commuting Outflows (2021 Census)**



Source: 2021 Census

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- 4.52 Turning to in-commuting in 2011, we can again see a clear distinction across the borough between the north, central area and south. However, there are clear relationships with Epsom Town and Central Sutton to the north; the western villages of Betchingley and Nutfield; and Caterham in Tandridge as well as Dorking, Mole Valley into the central area around Redhill and Reigate; and extensive relationships from Crawley (principally from Crawley Town); as well as from Smallfield in Tandridge, into Horley.
- 4.53 There are clear links to Kingswood and Walton on the Hill in Reigate & Banstead from Mole Valley, Epsom & Ewell, Sutton and Croydon; which at the time of the 2011 Census included large employers such as Legal & General, Fidelity and Pfizer – notably Legal & General are no longer situated in the borough. There are also strong links from Tandridge, Mole Valley and particularly Crawley to Earlswood in Reigate & Banstead; which includes East Surrey Hospital.
- 4.54 The evidence also points towards a notable degree of internal commuting to and from locations within the borough.

**Figure 4.8 Reigate & Banstead Commuting Inflows**



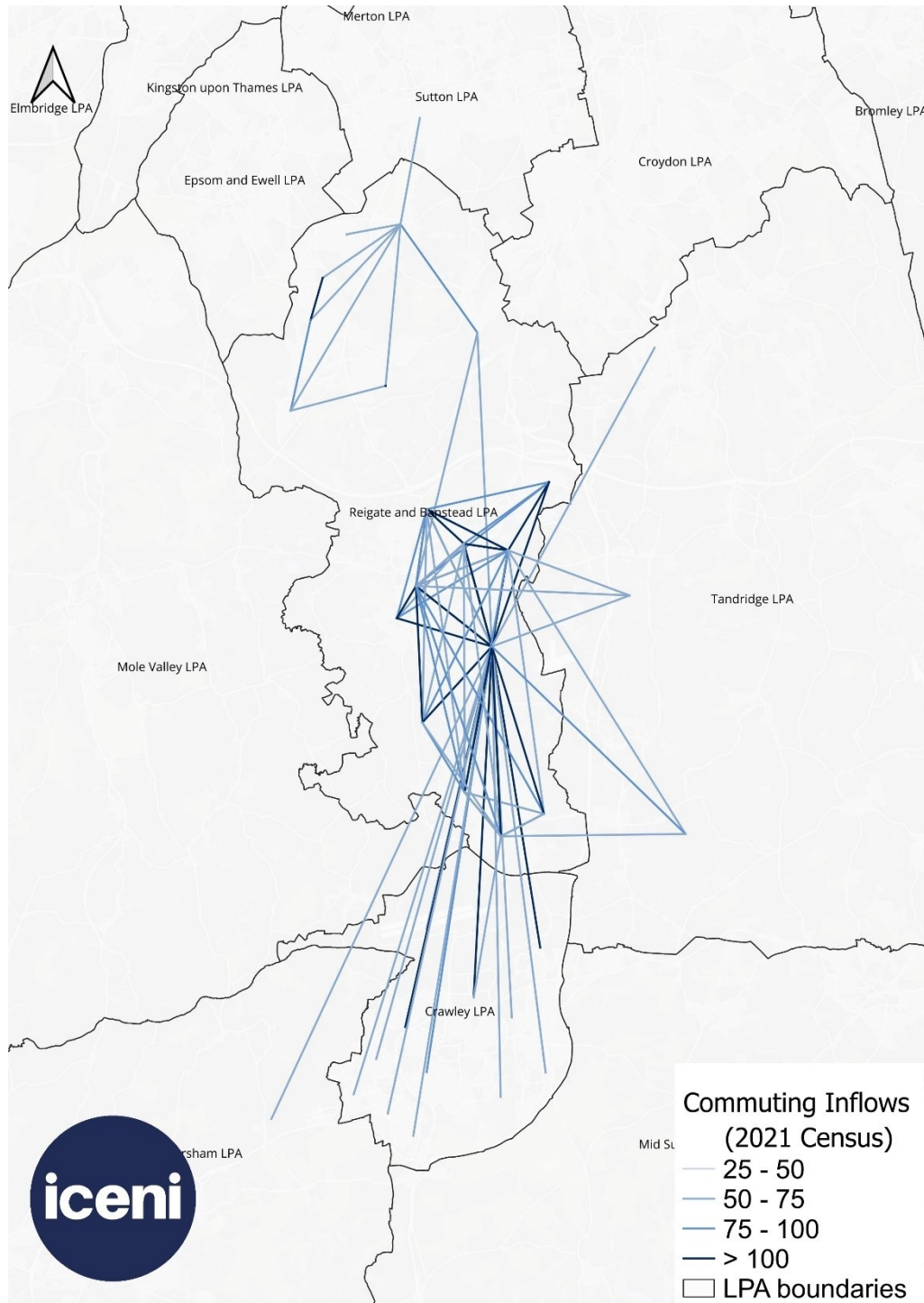
Source: 2011 Census

4.55 In contrast, the 2021 Census reveals less strong relationships with neighbouring authorities in terms of volume of inflows, however a relationship has been retained particularly in the south of the Borough with Crawley. This strongly suggests a separation between the southern parts of Reigate & Banstead and the northern parts, with most



commuting activity within the south and southeast of the Borough, and with very little inflow volumes between the northern and southern MSOAs.

**Figure 4.9 Reigate & Banstead Commuting Inflows (2021 Census)**



Source: 2021 Census

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4.56 Overall, the commuting patterns across the borough define **a clear separation of sub-areas** with varying relationships between the north, central area and south of Reigate & Banstead. This was the case in both 2011 and 2021 with similar patterns and proportions of flows, but with overall lower levels of commuter flows in 2021 when compared to 2011 because of the COVID-19 pandemic. It can be assumed that these lower levels were influenced in part by the lockdown conditions at the time of the 2021 Census.

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## **Commuting: Summary**

Reigate & Banstead is a net exporter of labour, with a self-containment rate of nearly 50%; which is not wholly unexpected given that the borough is well connected to the variety of employment opportunities and higher salaries in Central London.

There are clear distinctions in out-commuting flows between the north, central and southern areas of the borough. The north of the borough around Banstead has strong relationships with Epsom, Leatherhead and Central Sutton; whilst the centre of the borough around Reigate and Redhill has stronger relationships with Central London, as well as Dorking (Mole Valley) and Nutfield and Betchingley (Tandridge). The south of the borough has a stronger relationship with Crawley; as well as the more rural southern villages of Mole Valley and Tandridge.

There is a notable degree of commuting within Reigate & Banstead itself; but also relatively strong in-commuting relationships with Epsom Town and Central Sutton into the north of borough around Kingswood and Walton on the Hill – notably as a result of larger employers being based there; the western villages of Betchingley and Nutfield; and Caterham in Tandridge as well as Dorking, Mole Valley into the central area around Redhill and Reigate; and extensive relationships from Crawley (principally from Crawley Town); as well as from Smallfield in Tandridge, into Horley.

Commuting patterns across the borough define a clear set of sub-areas, with varying relationships between the north, central area and south of Reigate & Banstead.

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## **Spatial Relationship with London's Housing Market**

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- 4.61 Icenii have also reviewed the borough's spatial relationship with London's housing market.
- 4.62 In many areas across the greater South East, there is a functional inter-relationship with London, reflecting the movement of people from London to areas within the South East and East of England regionals, commuting flows back to London and wider economic ties between businesses in the region and the London economy.
- 4.63 This relationship also became more apparent as a result of the COVID-19 pandemic whereby households sought larger properties, greater value for money and more outdoor space during a time where national lockdowns were commonplace. The impact on day-to-day life is now an increased proportion of workers working-at-home and commuting less. However, migration data covering this period has not yet been published.
- 4.64 Nevertheless, as migration is an influence on the profile of housing need/demand in Reigate & Banstead, we have sought to consider this relationship within this sub-section of the report.

### **The Strength of the Relationship with London**

- 4.65 Migration flows between Reigate & Banstead and London have been analysed based on the 2017-20 ONS data. As shown in Tables 4.5 and 4.6 below, a greater proportion of people are moving out of London to Reigate & Banstead, than into London.
- 4.66 The highest numbers of migrants from London to Reigate & Banstead have been recorded from the south London Boroughs of Sutton and Croydon, as shown in Table 4.5.

**Table 4.5 Migration Flows to Reigate & Banstead from London, 2017-20**

<b>London Boroughs</b>	<b>No. of Flows</b>	<b>% of Total London Flows</b>
Sutton	971	25%
Croydon	851	22%
Merton	371	9%
Kingston	228	6%
Wandsworth	248	6%

Source: ONS Internal Migration Indices

4.67 For people migrating from Reigate & Banstead to London, the top destinations were similarly the south and south-west London boroughs, notably Croydon and Sutton.

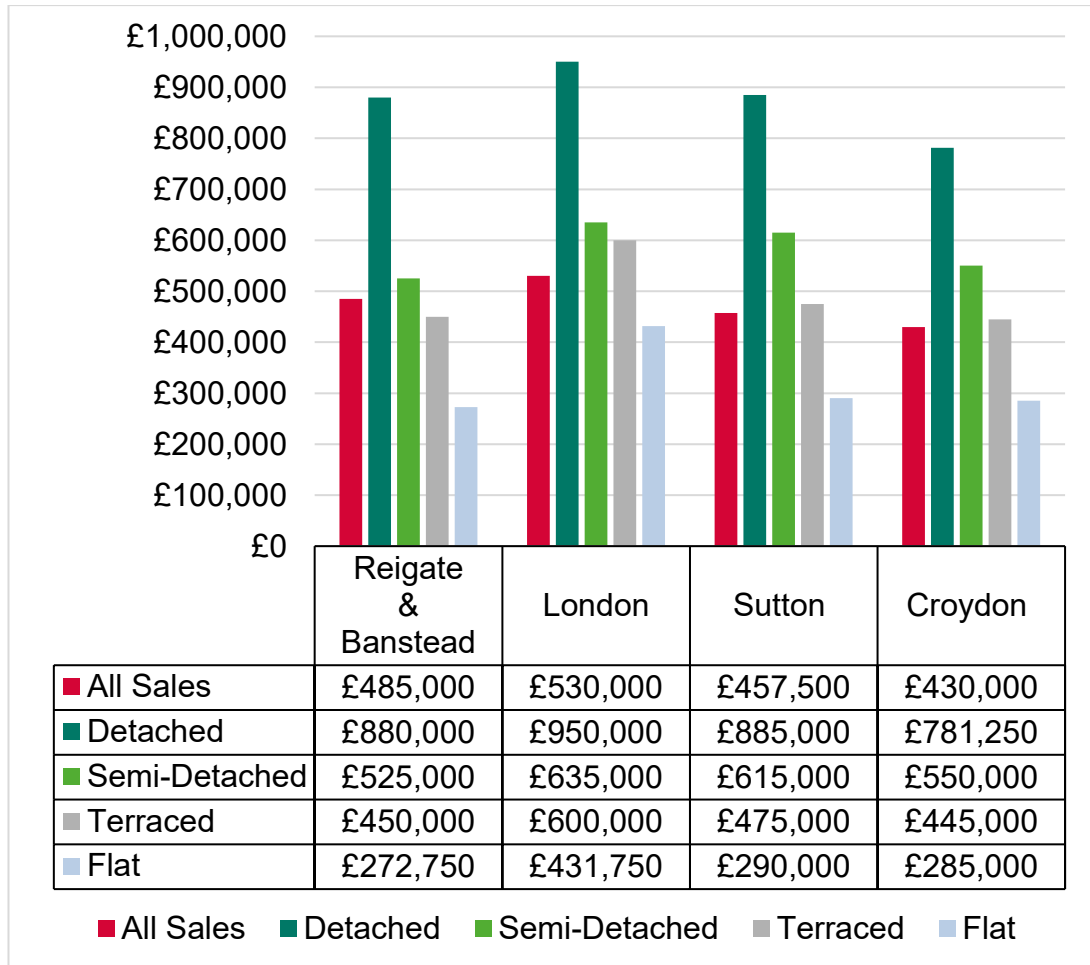
**Table 4.6 Migration Flows to London from Reigate & Banstead, 2017-20**

<b>London Boroughs</b>	<b>No. of Flows</b>	<b>% of Total London Flows</b>
Croydon	353	20%
Sutton	318	18%
Wandsworth	128	7%
Lambeth	98	6%
Kingston	87	5%
Merton	82	5%

Source: ONS Internal Migration Indices

4.68 The ONS data on migration flows shows the highest movements from London to Reigate & Banstead are from Sutton and Croydon. This may be driven by cheaper housing options for certain types of property – as shown in the Figure below – or a greater availability of family housing or other social and environmental factors.

**Figure 4.10 Median House Price Comparison by Location**



Source: ONS House Price Data, Year to December 2022

4.69 It should be noted that although the median price of properties across all housing types are lower in Sutton and Croydon; when prices by property type are considered, the median in these areas are higher than their counterparts within Reigate & Banstead – particularly for typically larger, detached and semi-detached housing in Sutton and to a lesser extent in Croydon.

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### **Relationship with London: Summary**

There are strong inter-relationships between Reigate & Banstead and outer London Boroughs – particularly with Sutton and Croydon. There is net movement from these London Boroughs to Reigate & Banstead, which is consistent with outflows from London to surrounding areas, including neighbouring authorities, and is ultimately influenced by a differential in house prices as buyers move further out to purchase a home or upsize to a larger semi-detached or detached property.

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## 5. Bringing the Evidence Together

- 5.1 This Paper has sought to analyse the housing market geography and housing market inter-relationships across areas in order to inform future engagement with neighbouring authorities on cross-boundary issues of housing needs and supply. It has considered both previous research and the latest data regarding house price differentials, migration and commuting flows.
- 5.2 The analysis broadly reaffirms the findings of previous studies that there are significant housing market inter-relationships with London, and particularly with the South London boroughs of Sutton and Croydon; with adjoining areas within Surrey; and with Crawley which borders the borough and is a major concentration of employment in the South East Region.
- 5.3 In terms of house prices, this paper has found that in Reigate & Banstead, house prices are generally higher towards the north of the district beyond the M25 and are similar to those in Epsom & Ewell, Croydon and Sutton; however, it is recognised that this is partly influenced by a greater proportion of detached properties to the north. At a borough/district level, there are similar house prices between Reigate & Banstead and Tandridge, Mole Valley and Crawley.
- 5.4 A review of like-for-like prices for non-terraced properties has identified relationships with borough hotspots such as Banstead and Walton on the Hill in the north with neighbouring towns and villages in Mole Valley, Epsom & Ewell and Sutton. Conversely, the same exercise has identified relationships with lower value areas to the south such as Horley with towns and villages in Tandridge and Crawley.
- 5.5 In respect of migration flows, this paper has found the strongest migration relationships are between the northern-most Gatwick Diamond authorities, i.e. Reigate & Banstead and Tandridge; Mole



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Valley; Epsom & Ewell and Sutton. Reigate & Banstead also has relatively strong migration links with the outer London borough of Croydon as well as Crawley and Horsham.

- 5.6 The relationship between Reigate & Banstead and Tandridge was strengthening before the COVID-19 pandemic whereas flows between Mole Valley declined slightly. The relationship between Reigate & Banstead and the outer London borough of Croydon has become stronger (excl. COVID-19 impact) in the last three years whereas the relationship with Sutton weakened. In addition, flows between Reigate & Banstead and Crawley and Mid Sussex declined whereas the relationship with Horsham has strengthened.
- 5.7 In respect of commuting patterns, this paper has found that there are clear distinctions in out-commuting flows between the north, central and southern areas of the borough. The north of the borough around Banstead has strong relationships with Epsom, Leatherhead and Central Sutton; whilst the centre of the borough around Reigate and Redhill has stronger relationships with Central London, as well as Dorking (Mole Valley) and Nutfield and Bletchingley (Tandridge). The south of the borough has a stronger relationship with Crawley; as well as the more rural southern villages of Mole Valley and Tandridge. The same is true for in-commuting; with the exception being almost no in-flows from London to Reigate & Banstead.
- 5.8 There is net movement from the south London Boroughs of Sutton and Croydon to Reigate & Banstead, which is consistent with outflows from London to surrounding areas, including neighbouring authorities, and is ultimately influenced by a differential in house prices as buyers move further out to purchase a home or upsize to a larger semi-detached or detached property.
- 5.9 Bringing this together, if London is treated as a single housing market area, as the Mayor advocates, the evidence in this report points to a principal housing market geography including Reigate & Banstead in a

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common housing market area with Mole Valley and Tandridge. However, it suggests there are also important (localised) relationships between these authorities with Crawley and Epsom & Ewell (and the London Boroughs of Sutton and Croydon). There are also strengthening relationships with Horsham with gross migration flows increasing in recent years which could in part be influenced by the scale of development occurring in Horsham in recent years.

5.10 In Duty to Cooperate terms, it is important that Reigate & Banstead engages with these authorities on cross-boundary relationships related to housing provision; recognising the relationships identified in this report – particularly with the Gatwick Diamond authorities where relationships are particularly strong.

5.11 However, when analysis at a more fine-grained local level is undertaken, this supports the identification of a number of separate sub-markets in the borough:

- North of Downs / M25: the northern part of the borough, including Banstead, Tadworth, Kingswood and Hooley is characterised by a greater functional inter-relationship with Epsom, Sutton and Croydon. It has a stronger functional relationship to London. It includes the area around Kingswood in particular where there is a concentration of detached housing.
- Redhill, Reigate and Merstham: there is a significant level of commuting across this area, and with Nutfield/South Nutfield in Tandridge to the east, and with Brockham and Dorking to the West. The evidence points to a local A25 Corridor Sub-Market. Reigate and Redhill are a strong commuter market to Central London influenced by the train service. There is a stronger flattened market in this area relative to other parts of the borough.
- Salfords and Horley: the southern part of the borough sees a strong relationship with Crawley and Gatwick to the South, which reflects its geographical proximity and the strength of that area as

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an employment destination with it being one of the largest in the South East region; as well as lower housing costs.

- 5.12 This provides a potentially more practical means of understanding local housing market influences and interactions; recognising that different parts of the borough essentially look in different directions in respect of house prices, commuting patterns and migration flows.