Gatwick Airport Northern Runway Project

Environmental Statement
Appendix 17.9.3: Assessment of Population and Housing Effects

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Summary Report

This report been prepared by Lichfields on behalf of Gatwick Airport Limited (GAL) to assess the population and housing effects of the employment generated by the proposal to make best use of London Gatwick Airport's existing runways and infrastructure (referred to within this report as 'the Project'). In particular, this report looks at whether the future supply of labour generated by current and potential future plans for housing supply would be sufficient to accommodate the additional operational employment generated by the Project in its operational phase. It also assesses any potential implications for the type and tenure of housing during operation and the potential impacts on demand for housing during the construction phase.

This report is structured in three main parts:

- **Summary Report** (this report) – this is a summary of the key conclusions of the analysis. It summarises the position regarding the population and housing effects of the Project;
- **Technical Report** – the technical report presents the data and analysis which underpins the Summary Report as well as a range of background and contextual information and a number of additional scenarios for future population, housing and job growth which were assessed by Lichfields as part of the process of preparing this report (and earlier versions). This includes presenting additional information and analysis to reflect comments received during the consultation process; and
- **Annexes** – the Annexes contain additional data for information purposes, including a local authority breakdown of the outputs of all scenarios assessed as part of the Technical Report. This is in response to comments received from local authorities during consultation.

Overall Housing Need

Context

The study area covered by this report comprises 17 local authority areas around Gatwick; this is considered to be an appropriate area of study because these are the authority areas which might reasonably be expected to experience any potential material impact on housing as a result of labour demand associated with the Project. The study area covers the Labour Market Area (14 authorities) plus a further three authorities.

This analysis uses a base date of 2021 and the base population for each local authority in the study area as per the 2021 Census. Key reporting years are 2024, 2029, 2032, 2038 and 2047.

This analysis is based on a range of official datasets published by the Office for National Statistics (ONS) (including Sub-National Population Projections and Census data, including economic activity), the Department for Levelling Up, Housing and Communities (DLUHC) (Sub-National Household Projections) and the Office for Budget Responsibility (OBR) (economic activity rate projections). This report also draws upon economic forecasts published by third parties[1] and employment estimates produced specifically for the purposes of the Project (by Oxera – see Environmental Statement [ES] Appendix 17.9.2 'Local Economic Impact Assessment'). This report also draws on housing monitoring information published by local authorities, such as annual monitoring reports, five-year land supply statements, housing trajectories and local plans.

Methodology

The assessment of future population, housing and job growth in this report uses industry-standard toolkit PopGroup which is widely adopted by local authorities within the evidence base for local plans to help establish estimates of housing need and is considered appropriate for the purposes of this report. Scenarios are modelled within PopGroup at the local authority level; however, within the Summary Report and Technical Report, results are aggregated to Housing Market Area (HMA) or study area level. Local authority outputs are available within the Annexes.

A total of 16 scenarios have been assessed (and are detailed further within the Technical Report) as part of this report, however, the conclusions of this report are based on a comparison between the outputs of the following principal two scenarios.

Current housing trajectories *(Scenario 8a in the Technical Report)*

This is a 'housing-led' scenario where the number of homes planned for the study area in existing local plans determines the number of people living in the study area (based on demographic projections[2]). In turn, this population determines the size of the labour force (based on its size and age structure, taking into account assumptions around economic activity rates[3] and unemployment). This estimate of labour force determines the number of jobs supported (based on commuting patterns). It should be noted that the PopGroup model translates homes into jobs in this scenario based on a fixed set of inputs (economic activity, unemployment and commuting); in reality these inputs could change in response to labour demand and supply.

Where the plan period or housing trajectory expires before 2047 (most areas now have plans covering the period only to 2031) average completion rates from that trajectory are extrapolated for the remainder of the period to 2047. Whilst this is an assumption, it is a prudent one because, generally, the rates of housing growth are lower than those produced by the Government's standard methodology for calculating housing need (c.18,000 dwellings per year compared with c.10,500 per year in plans) which would apply to new local plans that are produced over coming years. This scenario should therefore be viewed as a 'worst-case' scenario from a housing supply perspective.

This scenario is considered to be the likely 'future baseline' scenario for the population – albeit a 'worst-case' scenario from a housing supply perspective, for the reasons set out above - because it uses planned levels of housing growth (based on trajectories published by local authorities) to estimate the future population in the study area. From this population, the size of the labour force and number of jobs is estimated (i.e. labour force and jobs are an output based on the amount of housing and population).

Cambridge Econometrics employment, with the Project *(Scenario 5a in the Technical Report)*

This is a 'jobs-led' scenario where the number of jobs is an input to the PopGroup model, and this determines the size of the labour force required (based on commuting patterns), which in turn determines the population required which then determines the amount of housing needed. In this scenario, the amount of housing is an output. As noted previously the PopGroup model translates jobs into homes based on fixed inputs (economic activity, unemployment and commuting); in reality, these inputs could change in response to labour demand and supply.

In this case, the number of jobs is based on economic forecasts published by Cambridge Econometrics (CE), with the jobs associated with the Project taken into account. CE forecasts obtained for this analysis (published March 2022) suggest that across this study area there will be a total of 1.32m jobs by 2047; an increase of 119,400 from 2021, or c.4,600 per year. This is a level of job growth which broadly corresponds with the number of jobs underpinning evidence in currently adopted local plans in the study area over the next c.10 years. For this reason, CE is considered a reasonable assessment of likely baseline or ambient future job growth in the study area.

[1] Cambridge Econometrics has been used for the purposes of the Summary Report, however Experian forecasts have also been considered within the Technical Report in response to comments received from local authorities during the consultation process.

[2] Based on official projections published by the Office for National Statistics (ONS)

[3] Based on labour market participation rates published by the Office for Budget Responsibility (OBR).

Employment estimates produced by Oxera/ICF suggest the operational phase of the Project would result in c.9,500 jobs (direct, indirect, induced and catalytic, compared with how many jobs Gatwick would support without the Project) across the study area at its peak (2032), falling to c.8,700 jobs in the longer term (2047), as shown in Table SR1. The North West Sussex HMA (which also corresponds to the North West Sussex Functional Economic Market Area – FEMA – comprising Crawley [where Gatwick is located], Horsham and Mid Sussex) is anticipated to accommodate the greatest share of Project jobs – 35-36%.

Table SR1: Project jobs by Housing Market Area

	2029	2032	2038	2047
North West Sussex	1,049	3,308	3,300	3,131
Croydon and East Surrey	661	2,065	2,021	1,889
Coastal West Sussex	851	2,642	2,553	2,363
North East Surrey	255	794	773	718
Wealden and Eastbourne	213	662	640	593
Study Area Total	**3,030**	**9,471**	**9,286**	**8,694**

Source: Oxera

If all jobs associated with the Project were net additional (to job growth forecast by CE) this would suggest total job growth of 128,000 by 2047, or c.4,900 per year) in the study area. This could be a 'worst-case' scenario in terms of labour (and therefore housing) demand because it is possible that some jobs associated with the Project will substitute or displace other jobs which are included in the CE forecast. In these circumstances, overall employment growth will be lower than the 128,000 assessed within this report, and the result will be a lower labour force requirement and lower housing demand than this scenario (5a) suggests.

From these two scenarios (Scenario 8a and Scenario 5a) a comparison is made between labour supply (generated by a given level of housing growth – i.e. based on current housing trajectories) and labour demand (needed to support a given level of job growth – i.e. CE forecasts, with the Project). This enables the identification of any shortfalls, either in specific geographic areas or in key reporting years. If significant shortfalls are identified, these might need to be 'made good' by changes in commuting patterns, increases in economic activity and/or additional housing provision.

Outputs

This analysis primarily reports outputs at the Housing Market Area (HMA) level because HMAs represent the geographic areas across which people move in search of housing, taking into account commuting patterns, house prices and other factors (such as school catchment areas). The HMAs used within this report are based on the HMAs which have been identified by the authorities themselves within their evidence base, such as in a Strategic Housing Market Assessment, where this evidence is available. However local authority outputs are provided within the Annexes for information purposes, as requested by some local authorities during consultation.

In headline terms – i.e. across the study area as a whole - current housing trajectories provide for sufficient labour supply across the study area to meet CE forecasts of future job growth and with sufficient 'surplus' to match the additional labour demand generated by the Project (direct, indirect, induced and catalytic). Modelled labour demand over the assessment period associated with the CE forecasts (with all operational Project jobs) is c.143,000 whereas the labour supply likely to be generated by housing growth in existing local plans is c.238,000 by 2047 – a 'surplus' of c.95,000 in the labour force across the study area, as shown in Table SR2. From a housing perspective, modelled housing demand associated with CE forecasts (with all operational Project jobs) is 201,000 whereas housing growth on the basis of current trajectories is estimated to be 272,000 – a 'surplus' of c.71,000 homes by 2047 across the study area, as also shown in Table SR2.

The labour demand associated with Scenario 5a is likely to be a 'worst-case' scenario for the reasons set out above, and in addition, the current housing trajectory scenario (Scenario 8a) is likely to be the 'worst-case' scenario from a housing supply perspective because future housing supply will likely be higher than estimated by current trajectories (as plans are updated in response to current Government policy requirements). Therefore any labour supply shortfalls (at either the local authority or HMA level) identified between Scenarios 5a and 8a within this report should be seen as maximums.

To assess whether there are likely to be any localised 'pinch points', Table SR2 below summarises the position for each Housing Market Area (HMA) in the study area for the key assessment years of 2024, 2029, 2032, 2038 and 2047, comparing the labour supply generated by Scenario 8a with the labour demand associated with Scenario 5a.

It should be noted that because the Project's first year of opening is 2029, no operational employment impacts are anticipated in 2024 and hence the outputs are the same with or without the Project. In other words, the shortfalls in labour in the North East Surrey HMA and Wealden and Eastbourne HMA shown in Table SR2 are modelled to occur regardless of whether the Project's operational jobs are included within the modelling.

In 2029, 2032 and 2038 shortfalls are expected within the Croydon and East Surrey HMA and the North East Surrey HMA. Surpluses are anticipated in the North West Sussex HMA, Coastal West Sussex HMA and Wealden and Eastbourne HMAs. By 2047 all HMAs within the study area would be expected to have a labour surplus.

Table SR2: Summary of surplus/shortfall in labour supply and housing by HMA - Cambridge Econometrics forecast (with Project jobs) compared with current housing trajectory (Scenario 8a vs Scenario 5a)

	2024	2029	2032	2038	2047
Labour Supply					
North West Sussex	1,798	9,767	9,670	15,192	29,815
Croydon and East Surrey	1,864	-1,597	-4,089	-1,670	10,152
Coastal West Sussex	1,157	15,348	14,911	18,187	39,699
North East Surrey	-1,482	-412	-1,192	-936	3,454
Wealden and Eastbourne	-1,851	611	1,142	3,445	11,673
Study Area Total	**1,486**	**23,717**	**20,442**	**34,217**	**94,793**
Dwellings					
North West Sussex	974	5,887	6,376	10,310	20,923
Croydon and East Surrey	1,061	-855	-2,379	-1,432	6,348
Coastal West Sussex	429	10,775	11,428	15,989	33,189
North East Surrey	-809	-222	-658	-597	2,267
Wealden and Eastbourne	-1,380	22	350	1,892	8,120
Study Area Total	**276**	**15,606**	**15,118**	**26,163**	**70,847**

Source: Lichfields analysis

For HMAs where shortfalls have been identified, it is important to consider whether the Project is a determinative factor in this shortfall (i.e. whether the shortfall would occur in any event, even without the Project) and what the scale of this shortfall is (relative to, for example, the overall size of the labour force or available housing supply). In this context, Table SR3 below shows the labour supply position of Scenario 8a (labour and housing supply generated by current housing trajectories) compared with Scenario 4a (labour and housing demand associated with the CE forecast, without the Project). This shows that for Croydon and East Surrey a labour shortfall would be expected in 2029 and 2032 even if the Project did not take place. Similarly, in the North East Surrey HMA, a shortfall would be anticipated without the Project in 2029, 2032, and 2038 even without the Project. The inclusion of the Project therefore makes an already-anticipated shortfall ever so slightly greater.

The only HMA and assessment year in which the Project is the determinative factor is therefore in the Croydon and East Surrey HMA in 2038; without the Project there is expected to be a surplus of 904 (Table SR3 below) whereas with the Project there is anticipated to be a shortfall of 1,670 (Table SR2 above). In housing terms, there is expected to be a surplus of 382 without the Project but a shortfall of 1,432 with the Project. This is likely to represent a worst-case scenario because some Project jobs may not be net additional (over and above those jobs already in the CE forecast) and it does not take into account likely future increases in housing supply (as plans are

reviewed). By 2047 (the long-term forecast year) this HMA would be expected to have a substantial surplus (in labour and housing) with or without the Project.

Table SR3: Summary of surplus/shortfall in labour supply and dwellings by HMA - Cambridge Econometrics forecast (without additional Project jobs) compared with current housing trajectory (Scenario 8a vs Scenario 4a)

	2024	2029	2032	2038	2047
Labour Supply					
Northern West Sussex	1,798	10,718	12,667	18,173	32,638
Croydon and East Surrey	1,864	-754	-1,456	904	12,557
Coastal West Sussex	1,157	16,247	17,703	20,885	42,197
North East Surrey	-1,482	-148	-371	-139	4,195
Wealden and Eastbourne	-1,851	874	1,957	4,233	12,403
Study Area Total	**1,486**	**26,938**	**30,500**	**44,057**	**103,990**
Dwellings					
North West Sussex	974	6,405	8,087	12,345	23,063
Croydon and East Surrey	1,061	-389	-860	328	8,178
Coastal West Sussex	429	10,897	13,206	17,385	35,327
North East Surrey	-809	-84	-197	-47	2,842
Wealden and Eastbourne	-1,380	191	909	2,534	8,777
Total	**276**	**17,021**	**21,145**	**32,545**	**78,187**

Source: Lichfields analysis

In 2038, Scenario 8a (current housing trajectories, which comprises the future baseline for population, labour and housing for the purposes of the Socio-Economic Chapter) indicates there will be a total labour supply of 370,770 in the Croydon and East Surrey HMA. The inclusion of the Project represents a change of 2,574 in the labour supply (+904 without the Project to -1,670 with the Project) which represents a magnitude of change of 0.7%. Based on the significance criteria used in Chapter 17 of the ES (Socio-Economics) for the labour market during the operational phase, impacts of up to 5% in the Labour Market Area are described as 'Very Low'. However it is important to recognise that the 'Croydon and East Surrey HMA' does not in and of itself form a study area for the purposes of the Socio-Economic assessment in the ES; any housing impacts in this HMA are relevant only insofar as it is a constituent part of the Labour Market Area, which is referred to as a whole within the main Socio-Economic Chapter (para 17.9.137).

It should also be reiterated that additional housing provision is not the only way this shortfall (or indeed any shortfall elsewhere, with or without the Project) can be 'made good'; labour shortfalls could be rectified by one (or more) of any of the following occurring; increases in economic activity within the HMA, reductions in unemployment rates within the HMA and/or changes in commuting patterns (e.g. an increase in in-commuting into or a reduction in out-commuting from the HMA). In light of the fact that the labour shortfall equates to just 0.24% in the only HMA where the Project is a determining factor, and the much greater surpluses that exist within other HMAs in the study area at that time (for example, in 2038 the surplus that exists within the North West Sussex HMA – i.e. the FEMA – equates to a 6.9% surplus on an overall labour supply of 262,000, and in the Coastal West Sussex HMA the surplus equates to 4.1% on an overall labour supply of 507,000), only a relatively small change in any of these factors would need to occur to 'make good' the identified shortfalls.

In light of this, and given substantial surpluses in labour supply that are anticipated to exist across the study area as a whole (over 34,000 in 2038, of which a surplus of over 15,000 is found within the North West Sussex HMA), and the fact that housing trajectories are extrapolated in the later assessment years, it is not considered that there is likely to be any significant housing effects as a result of operational employment demand associated with the Project in any housing market area within the study area.

Furthermore, the standard method results in substantially higher future housing supply when compared with current trajectories across the study area, and would be expected to generate substantially greater labour supply than current trajectories; enough to result in labour surpluses in every housing market area in every assessment year. This is explored in further detail within the Technical Report.

Tenure of housing needed

This report also gives consideration to whether operational employment associated with the Project might have implications for the demand for different tenures of housing (particularly affordable housing), particularly in those areas immediately adjacent to Gatwick where the majority of employment associated with the Project will be based.

Based on current occupancy patterns by socio-economic group, an estimated 17% of workers associated with the Project's operational jobs in the authorities immediately adjacent to Gatwick are expected to require affordable rented housing (equating to 791 out of the 4,793 total operational Project jobs in these authorities at the peak in 2032). Across the study area as a whole, an estimated 14% of workers associated with the Project are expected to require affordable housing (1,344 out of 9,471 in 2032). This is slightly higher than the proportion of affordable housing within the existing stock across both geographies.

A review of recent affordable housing delivery, current evidence of affordable need published by the Councils, policies in local plans and pipeline delivery of affordable housing on large-scale sites has been conducted. This shows that the operational demands associated with Project (which are likely to be slightly skewed more towards affordable housing than the existing employment base) are unlikely to have any impact on affordable housing demands beyond what is already emerging or being planned for in the authorities in Gatwick's surrounding area, because:

- **Recent completions** – in the local authority areas adjacent to Gatwick, affordable housing delivery has been 21% of all housing completions collectively since 2018; this is above the level of affordable housing in the existing stock and the likely affordable housing need associated with the Project;
- **Local evidence of need** – local authority evidence bases in the adjacent authorities already acknowledge the scale of affordable housing need, and in all cases this need (as a proportion of overall need) is significantly higher than the current stock of affordable rented housing and the affordable housing need associated with the Project. In Crawley the affordable need has been identified by the Council as being 75% of overall need, in Horsham this is 36%, in Mid Sussex 43%, in Mole Valley 19%, in Reigate and Banstead 68-76% and in Tandridge 48-98%. The Project therefore is not expected to place any additional pressure on affordable housing need beyond that which the Councils themselves already acknowledge to exist;
- **Local plan policies** – local plan policies in the adjacent authorities require a level of affordable housing which is well above the level of affordable housing within the existing stock and the need associated with the Project. In Crawley, the adopted (and emerging) plan requires 40% of housing to be affordable, in Horsham this is 35% (adopted), in Mid Sussex 30% (adopted and emerging), in Mole Valley 30-40% (emerging), in Reigate and Banstead 20-30% (adopted), in Tandridge 34% (adopted, 20-40% in the emerging plan). The Project therefore is not expected to place any additional pressure on affordable housing policies beyond policies which are already adopted or emerging; and
- **Pipeline supply** – pipeline supply across the adjacent authorities typically is making provision for affordable housing at or close to levels of affordable housing in plans. For example, the majority of the eight strategic sites in the North West Sussex HMA analysed were delivering 30% affordable housing. In Reigate and Banstead the key strategic site in the Core Strategy (Horley North West) is making provision for 25% affordable housing. In Tandridge and Mole Valley, the nature of these areas (being heavily Green Belt constrained) means there are limited amounts of large-scale strategic housing sites, and the largest development sites in these areas are typically brownfield sites which have relatively low affordable housing delivery (our analysis showed sites delivering 111-214 units, with affordable delivery ranging from 0% to 17% on these sites). However, in both areas, the adoption of new local plans would be expected to create a step-change in overall housing delivery as well as affordable housing delivery, as indicated by the affordable housing requirements in those emerging plans (as cited above).

Authorities therefore already recognise that future affordable housing needs are well above the level of affordable housing in the existing stock, and policies (adopted and emerging) along with emerging large-scale schemes are therefore seeking to maximise affordable housing delivery (subject to viability and other factors). The proportion of affordable housing need associated with the Project – whilst slightly higher than the affordable housing stock associated with the current employment base - is unlikely to place any further upward pressure on affordable housing delivery in the future beyond pressures that already exist, acknowledged by the Councils, and which feed into current/emerging policies and underpin decision-making. The Project is therefore unlikely to result in any significant effects insofar as the specific tenure requirements of housing within the study area.

Housing during construction

Analysis prepared by Quod on behalf of GAL for the purposes of the Project (see Appendix 17.9.1 of the Environmental Statement) suggests the construction workforce will peak at c.1,400 workers in February 2027, of which it is estimated that up to 20% may be non-home based (NHB) and therefore require temporary accommodation, with the vast majority being located in Crawley and Reigate & Banstead. For the reasons set out by Quod in (Section 4 of Appendix 17.9.1 of the ES), the assumption that 20% of construction workers will be NHB should be seen as a 'worst-case' scenario from the perspective of demand for accommodation.

NHB workers will be accommodated in a number of ways, depending on their role (and therefore income available to spend on housing) and duration working on the Project. This report has assessed the housing market's potential to absorb housing demand from temporary workers for the seven authorities where >1 NHB worker is expected to be accommodated; Crawley, Mid Sussex, Horsham (which make up the North West Sussex HMA), Reigate & Banstead, Mole Valley, Tandridge and Croydon. Collectively these account for 250 of the 270 NHB workers at the construction peak.

This analysis primarily focuses on the private rented sector and its capacity to absorb this potential demand, but also other sources of housing supply for construction workers. It shows that the demand for temporary accommodation during the construction phase from NHB workers is unlikely to give rise to significant housing effects as the number of NHB workers (even at its peak) represents a very small proportion of the potential sources of housing/accommodation supply which might meet this demand.

Conclusions

This report has been prepared in order to assess the population and housing effects of the employment generated by the Project. The conclusions are as follows:

- **Overall need for housing** - it is not considered that there is likely to be any significant housing effects, in terms of the overall demand for housing in the study area or any particular HMA, as a result of operational employment demand associated with the Project;
- **Tenure requirements** - the Project is unlikely to result in any significant effects insofar as the specific tenure requirements of housing within the study area, based on a review of recent completions, current evidence of affordable housing need, local plan policies and pipeline housing supply; and
- **Housing during construction** - demand for temporary accommodation during the construction phase from non-home-based workers is unlikely to give rise to significant housing effects.

Technical Report

1 Introduction

1.1.1 This report has been prepared by Lichfields on behalf of Gatwick Airport Limited (GAL) drawing on economic model inputs from Cambridge Econometrics, Experian and Oxera/ICF. It explores the specific issue of population and housing and the potential effects of the proposal to make best use of Gatwick Airport's existing runways (referred to within this report as 'the Project').

1.1.2 The issue of population (and housing) was proposed to be scoped out of Environmental Impact Assessment (EIA) in the EIA Scoping Report, with paragraph 7.10.24 stating that:

"The Project does not propose any residential development and therefore it is not anticipated that it would directly give rise to population effects either during construction or operation, in terms of changing population levels within the assessment areas. Future labour demand will be distributed across a wide labour catchment area so no significant impacts on population levels or housing and community infrastructure needs are expected."

1.1.3 However, at ID 4.10.1 of its Scoping Opinion response, the Inspectorate advised that:

"The Scoping Report states that no residential development is proposed, therefore it is not anticipated that there would be any changes to population levels within the assessment area. It further states that future labour demand would be distributed across a wide labour catchment so no significant effects on population levels or housing and community infrastructure needs are expected. The Inspectorate does not consider that sufficient information has been provided to demonstrate that an increase in worker numbers, during both construction and operation, would not affect the demand for housing and community infrastructure. The Inspectorate therefore does not agree that effects on population (including impacts on the housing supply) can be scoped out of the assessment."

1.1.4 This report provides the background analysis to assess the effects of the Project on population levels and housing to determine how labour demand generated by the project may impact on housing need/demand. This report primarily focuses on potential effects during the operational phase, however reference is also made to the construction phase.

1.2 Context

Study area

1.2.1 The study area covered by this report is shown in Diagram 1.2.1 and comprises a total of 17 local authorities surrounding Gatwick ('Gatwick'). The study area used in this report is slightly larger than the Labour Market Area and is significantly smaller than the Six Authorities Area which are the other geographies referred to elsewhere in the Environmental Statement (ES)[4]. For this reason, figures (for example, job forecasts) for the study area referred to in this report will be slightly higher than comparable figures for the Labour Market Area and significantly lower than comparable figures for the Six Authorities area which may be quoted elsewhere in the ES, where the same source is referred to.

1.2.2 The study area used in this report encompasses:

- The 14 local authorities in the Labour Market Area (Croydon, Reigate and Banstead, Tandridge, Mole Valley, Crawley, Horsham, Mid Sussex, Arun, Adur, Worthing, Brighton and Hove, Lewes, Wealden and Eastbourne);
- Elmbridge and Epsom and Ewell because these overlap into Mole Valley's housing market area[5]; and
- Chichester because this overlaps into the Coastal West Sussex housing market area (which covers Arun, Adur, Worthing, Brighton and Hove and Lewes).

1.2.3 The purpose of this report is to assess the potential effects of the Project insofar as how labour demand may impact on housing need/demand; the relevant area for assessment is therefore the authorities which might reasonably be expected to feel any potential impact on housing as a result of labour demand associated with the Project. For this reason, the study area includes all authorities which fall within the Labour Market Area (since this is the area from which Gatwick draws most of its workers, and therefore might be expected to feel any impacts of additional housing demand) and authorities which fall outside Gatwick's Labour Market Area but are in housing market areas which overlap into the Labour Market Area. This is because housing market areas are geographical representations of live-work patterns, i.e. they are typically the areas within which people look for housing when employed in a given area. Any potential housing impacts in Gatwick's Labour Market Area (e.g. increases in housing demand due to job growth and labour demand) might therefore be expected to have a 'ripple out' relationship with these authorities (despite these authorities not being in Gatwick's labour market area).

1.2.4 It is not necessary to extend the study area any wider (e.g. to the Six Authorities Area) because outside of this study area there would not be anticipated to be material housing effects associated with the Project. This is because Gatwick draws the majority of its workers from within the Labour Market Area, and any housing effects would only be expected to be felt within housing market areas which are within (or overlap into) this Labour Market Area. Beyond the study area it is not anticipated that any potential material housing effects, resulting from the labour demand associated with the Project, would be felt.

1.2.5 It is also not necessary to identify potential housing effects below local authority level because housing market areas represent the geographical areas across which people move in search for housing, taking into account where they work, and these typically cover multiple local authorities, or at the very least, a single local authority. For example, for a job in Crawley it can be expected that an individual or household will search for housing anywhere within the local authority areas of Crawley, Horsham or Mid Sussex, because these local authorities have identified themselves as being within the same housing market area[6]. It is not necessary to ensure that every individual or household working within Crawley is able to access housing in Crawley (or

[4] The basis for the various geographies is set out within the Environmental Statement Chapter 17: Socio-Economics para 17.4.7 onwards.

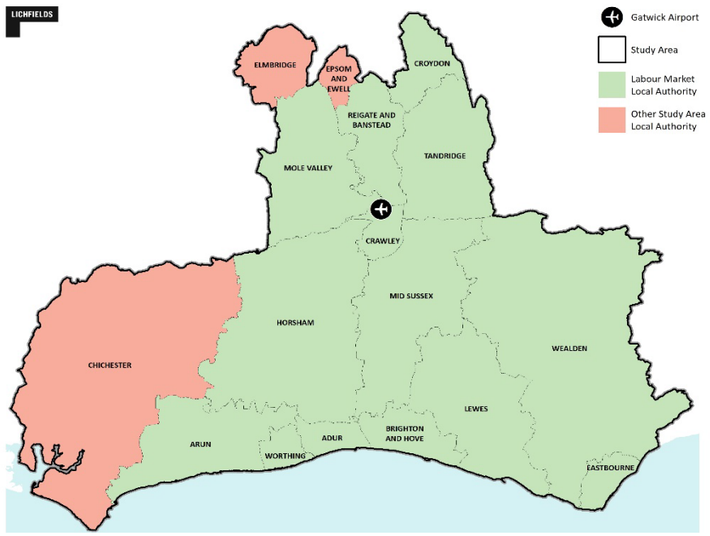
[5] The London Borough of Kingston-upon-Thames also falls within the North East Surrey housing market area but has not been included because it falls outside the six authorities area for which Oxera has produced employment estimates.

[6] For example, see Northern West Sussex Strategic Housing Market Assessment (October 2014) para 2.52 which states "On this basis, at the time of preparing this update to elements of the SHMA, it is concluded that the Northern West Sussex HMA continues to represent the primary Housing Market Area that Crawley Borough, Horsham and Mid Sussex Districts should consider and plan for, following the functional housing and economic geographies established in the SHMA, 2009.

indeed, in the immediate vicinity of where they work) because this would not reflect actual live-work patterns (which reflect factors such as public transport availability, drive times, housing costs, commuting costs, infrastructure such as schools, and other factors which affect where people choose to live).

1.2.6 In the case of Gatwick, the Labour Market Area is based on the area from which Gatwick draws its most of its workforce. This includes 14 different local authorities; in other words Gatwick does not rely solely on workers who live in its immediate vicinity or indeed even within Crawley or the North West Sussex Housing Market Area (comprising Crawley, Horsham and Mid Sussex). On this basis, it is reasonable to assume that future workers at Gatwick (including those associated with the Project) will also be drawn from the Labour Market Area, and not from within very close proximity (i.e. Gatwick's immediate vicinity, for example as defined as the 'Local Study Area' elsewhere in the ES). For these reasons this report does not assess the potential housing effects or present outcomes below local authority level.

Diagram 1.2.1: Study area



Source: Lichfields

Methodology

1.2.7 The assessment of future population, housing and job growth in this report uses industry-standard toolkit PopGroup. PopGroup is a family of demographic models (developed by University of Manchester and owned by the Local Government Association) to develop population, household and labour force forecasts.

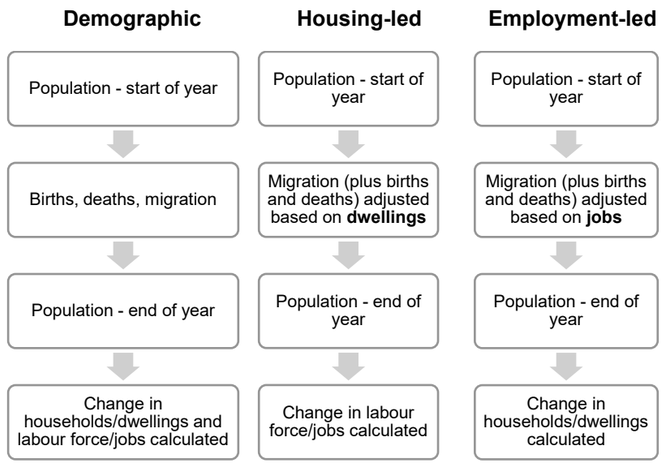
PopGroup incorporates a cohort component methodology for its population projection model, a headship rate model for its household projection model and an economic activity rate model for its labour-force projection model.

1.2.8 PopGroup is used by a large number of local authorities in the UK and has been subject to extensive enhancement and development over the last ten years. It is widely adopted by those preparing the evidence base for local plans to help establish estimates of housing need. Scenarios run through PopGroup can be either 'demographic-led' or constrained (e.g. 'housing-led' or 'jobs-led'):

- In demographic-led scenarios, the change in population between each year is calculated based on a starting population and given birth rates, death rates and levels (or rates) of migration. Based on the population, the number of homes is calculated (using inputs on the number living in communal establishments, household formation rates and dwelling vacancy rates) and the number of jobs is calculated (using inputs on economic activity rates, unemployment and the labour force ratio). Therefore, the number of homes and jobs are outputs, driven by demographic change;
- In 'constrained' scenarios, a given input or 'constraint' (e.g. number of homes or jobs) is used to 'dictate' population change year on year:
  - For housing-led scenarios, a given change in the number of homes is used to determine how many people can be accommodated (based largely on household formation rates). The number of migrants is adjusted so that (once births/deaths are applied) the population generates the given change in number of homes. This population is then used to determine how many jobs are supported in that area.
  - For employment-led scenarios, a given change in the number of jobs from one year to the next (e.g. based on a separate economic model or job 'target') is used to determine how many people are needed (based on economic activity rates, unemployment and the labour force ratio). The number of migrants is adjusted so that (once births/deaths are applied) the population is the required size to support the inputted number of jobs. This population is then used to determine how many homes are needed to sustain that estimate of future employment.

1.2.9 These methodologies are illustrated in Diagram 1.2.2.

Diagram 1.2.2: Methodology - Demographic, Housing and Employment scenarios



Source: Lichfields based on PopGroup

1.2.10 Using PopGroup, scenarios have been generated to explore whether the planned levels of housing provision in the study area would be sufficient to accommodate the anticipated level of employment growth and what, if any, impact would arise from the introduction of the extra employment arising from the operation of the Project.

1.3 Base Date

1.3.1 This report represents an update to an earlier version (herein "the previous version"), produced in 2021 as part of the Preliminary Environmental Information Report (PEIR). At the time the previous version of this report was produced the latest Mid-Year Estimates of the population ('MYEs') (published by the Office for National Statistics, 'ONS') were the 2019 MYEs. These provide a breakdown of the estimated population by single year of age for each local authority in June of each year. In the previous version of this report the 2019 MYEs formed the base date of the modelling to which projections of growth were applied; this meant that population figures for 2020 onwards were projections.

1.3.2 In June 2022 ONS published its first results from the 2021 Census, which took place in March 2021. This included figures for population by sex and five year age group for each local authority in England and Wales. These Census population figures have therefore been used as the base of the modelling within this report. Future growth (in terms of births, deaths, migration and housing need) are now based on the 2021 Census population for

each local authority, rather than the 2019 MYEs as per the previous report.

1.3.3 A comparison of the projected population in 2021 set out in the previous report (i.e. the population that would have been expected, based on the 2019 MYEs and applying projected growth as per the 2018-based Sub-National Population Projections – Scenario 3a) and the 'actual' population as indicated by the 2021 Census shows that the difference in overall population is relatively small; just 0.5% across the whole study Area, as shown in Table 1.3.1. The previous version of this report projected that there would be 2,469,724 people in the study Area in 2021, whereas the 2021 Census showed that this number was actually 2,457,600; 12,124 (0.5%) lower.

1.3.4 These differences do vary between local authorities however; in some authorities the Census population was slightly above what was projected for 2021, and in other authorities the Census population was lower. The margin of error ranges from 0.05% in Horsham (in other words, the projected total population in 2021 in the previous report was almost exactly in line with the actual population recorded by the Census) to 5.1% in Brighton and Hove. A full breakdown by local authority is contained in Annex 1.

Table 1.3.1: Comparison of projected and actual population in 2021

	Study area
Population in 2019	2,451,607
Projected Population in 2021 (previous version of this report, Scenario 3a)	2,469,724
Actual Population in 2021 (Census)	2,457,600
Difference	-12,124
Difference (%)	-0.5%

Source: Lichfields analysis using PopGroup from previous version of report, ONS Mid-Year Estimates and 2021 Census. 2021 Census figures are rounded to the nearest hundred by ONS.

1.3.5 Updating the base population to the 2021 Census does not result in any substantial changes to the modelling, outputs or conclusions compared with the previous version of this report, however it does ensure that the starting point of the modelling is representative of the most recent population data available at the time of writing.

Report outputs and limitations

1.3.6 Within this report key metrics and conclusions are given for specific years in the project. The key reporting years are:

- 2021 - the base year (for which the latest population data [the 2021 Census] is available);
- 2024 - commencement of main construction phase;
- 2029 - first year of opening;
- 2032 - interim assessment year;
- 2038 - design year; and
- 2047 - long-term forecast year.

1.3.7 This report has been prepared specifically in the context of the Project. It is intended to assess whether the impact of additional jobs generated through the operational phase of the Project is likely to have a significant impact on population growth and housing needs when compared with a range of other 'business as usual' scenarios (e.g. official population projections, population growth resulting from planned/expected housing growth, underlying job growth) across the study area.

1.3.8 It is based on data which was available at the time of preparation (and a fixed set of assumptions, which are detailed in Annex 2 and Annex 3). This is data which would be superseded over time. This data has been obtained by Lichfields from third parties for the purposes of this report, namely from:

- The Office for National Statistics (ONS), which produces the population projections, census data (2011 Census data is used here for dwelling vacancy and economic activity and 2021 Census data is used as the base population[7]), survey data (used for unemployment) and household projections (2016-based onwards);
- The Department for Levelling Up, Housing and Communities (DLUHC), formerly known as the Ministry for Housing, Communities and Local Government (MHCLG), which was responsible for the publication of the household projections up until 2016, when it produced the 2014-based projections. DLUHC also publishes the formula for the 'standard method' for assessing housing needs which is used in this assessment;
- Cambridge Econometrics (CE), which produces the baseline employment forecasts used in this analysis. CE produces its forecasts independently on the basis of wider macroeconomic trends. The CE forecasts used in this report are the March 2022, consistent with the rest of the ES;
- Experian, which, similar to CE, produces economic forecasts independently on the basis of wider macroeconomic trends. Although Experian forecasts do not form the basis of the conclusions reached in this report, it was requested by some local authorities during the consultation process that Experian forecasts were considered within the assessment. The Experian forecasts used in this report are the March 2022 forecasts, consistent with the CE forecasts and the rest of the ES;
- Oxera/ICF, which provided the estimates of future employment associated with Gatwick;
- The Office for Budget Responsibility (OBR), which produces the labour market participation rate projections used in this analysis (these projections are applied to the local economic activity rates for each area, from the Census, as described above); and
- Local authorities, for the purposes of establishing the most recent housing trajectory in each area[8].

1.3.9 Inputs and assumptions used in this report are either taken directly from these sources or are derived using data from these sources[9].

1.3.10 The report does not analyse the full range of inputs required when determining local housing needs or requirements at a housing market area or local level (such as market signals, affordable housing or constraints on housing supply), nor does it purport to cover all the scenarios which may need to be considered. It also applies a start date of 2021 and thus does not attempt to account for any backlog of need which might already exist. For clarity, this report should not be used for the purposes of:

[7] This is because at the time of preparing this report the only results available from the 2021 Census were population (by sex and five year age groups) and household figures at local authority level. Detailed information (e.g. on housing and economic activity) are yet to be published and therefore the 2011 Census continues to be used for those indicators within this report.

[8] This was based on the most up-to-date trajectory published online by each local authority at the time of preparing this report. Full sources are given in Annex 3.

[9] For example, the labour force ratio, which is calculated using a combination of mid-year population estimates (from ONS), economic activity rates (from OBR), unemployment (from ONS) and jobs (from CE). See Annex 2 for further information.

- Establishing or justifying objectively assessed housing need or the appropriate local housing need figure for any local authority or housing market area;
- Establishing or justifying the housing requirement for any local authority or housing market area;
- Plan-making (or any other strategy-making) for any local authority; or
- Determining an appropriate spatial strategy for housing, employment, transport or other infrastructure (other than insofar as it relates to the Project).

1.4 Report structure

1.4.1 The report is structured around the key scenarios generated to inform the analysis:

- **Section 2.0 Demographic scenarios:** this section assesses the amount of housing needed and jobs which could be supported based on official demographic projections;
- **Section 3.0 Employment-led scenarios:** this section assesses how much population growth and housing growth would be needed to support different levels of employment growth;
- **Section 4.0 Housing-led scenarios:** this section reviews how much housing could be expected to come forward across the study area, and how much labour supply this could be expected to generate;
- **Section 5.0 Labour supply analysis:** this section provides further detail for the labour supply outcomes in the study area based on the preceding analysis;
- **Section 6.0 Housing need during construction:** this section assesses the potential demand associated with temporary construction workers and impact on the housing market in the study area;
- **Section 7.0 Housing types and tenures**: this section assesses the potential housing types and tenures workers associated with the Project may require and compares this with planned development; and
- **Section 6.0 Conclusions.**

1.4.2 This report is also supported by the following Annexes:

- Annex 1 - Comparison between projected and actual 2021 population
- Annex 2 - Model inputs and assumptions
- Annex 3 - Housing Trajectory data
- Annex 4 - Headline outputs for all scenarios by local authority area
- Annex 5 - Cambridge Econometrics Methodology Note
- Annex 6 - Experian Methodology Note
- Annex 7 - Detailed outputs for labour supply analysis – Current Trajectories and Cambridge Econometrics
- Annex 8 - Detailed outputs for labour supply analysis – Standard Method Housing and Experian

1.4.3 It is important to note, where in-text values are rounded within this document, the exact figures can viewed by referring to the relevant tables.

2 Demographic-led scenarios

2.1.1 In this section of the report the demographic, housing and employment implications of scenarios of future change based on recent sets of official demographic projections are considered. The projections referred to are:

- Sub-National Population Projections (SNPP), produced by the Office for National Statistics (ONS). These are typically produced every two years however no projections were produced in 2022 (these would have been the 2020-based projections) because a Census was undertaken in March 2021 and ONS will consider the results of this before preparing a new set of SNPPs[10]. The most recent projections are therefore the 2014-based SNPP (published in 2016), 2016-based SNPP (published in 2018) and 2018-based SNPP (published in 2020); and
- Sub-National Household Projections (SNHP), also produced every two years (with the exception of 2022, due to the 2021 Census). Up until the 2014-based SNHP, these were produced by the Department for Levelling Up, Housing and Communities (DLUHC), formerly the Ministry of Housing, Communities and Local Government (MHCLG). The 2016-based SNHP onwards are produced by ONS.

2.1.2 It should be noted that none of the demographic-led scenarios are relied upon for the purposes of the conclusions of this report, which are set out within the earlier summary report.

Demographic-led scenarios take no account of planned levels of housing growth or other external factors (such as labour demand from employment growth); they are based on official population projections which use past trends to trend forward births, deaths and migration in each local authority to project the future population. Demographic-led scenarios are presented within this technical report for information/contextual purposes because they represent official population projections published by the relevant government bodies, and are sometimes assessed within the evidence base of local authorities for the purposes of plan-making.

2.1.3 Similarly, although scenarios which incorporate headship rate sensitivities do not underpin the conclusions of this report (within this section, Scenario 3b, and subsequent 'b' scenarios) it is acknowledged that one of the purposes of the affordability uplift within the standard method for assessing local housing need is to help release pent-up demand for housing by inducing household formation (over and above rates projected within official projections). For this reason, the results of headship rate sensitivities are included within this report for information purposes.

2.2 Context

2.2.1 As of the 2021 Census the population in the study area amounts to 2.46m; 4.1% of England's population. On average, since 2001, the population of the study area has grown by 0.77% per year; slower than England which has grown by 1.06% per year (see Table 2.2.1). The study area has an older population than the national average, with a lower proportion of its population under the age of 44 and a higher proportion over the age of 44, as shown in Table 2.2.1.

[10] At the time of writing this report the ONS release calendar does not indicate when it expects to publish a new set of Sub-National Population Projections.

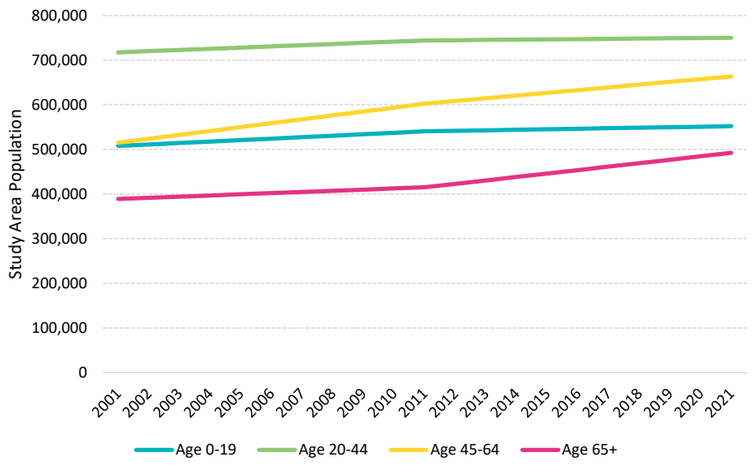
Table 2.2.1: Headline population indicators - study area and England

		Study area	England
Population in 2021		2,457,600	59,597,300
Growth since 2001 (per annum, average)		0.77%	1.06%
Age structure (2021)	0-19	22.5%	23.1%
	20-44	30.5%	32.5%
	45-64	27.0%	25.8%
	65+	20.0%	18.6%

Source: Lichfields analysis using 2001 and 2021 Censuses

2.2.2 In line with wider trends the study area has seen ageing in recent years, with older working age people (age 45-64) and the elderly (over 65s) being the fastest growing groups. There has also been some growth in the number of children (0-19) whilst the number of younger working age people (20-44) has been fairly stable, particularly in the last decade, as shown in Diagram 2.2.1.

Diagram 2.2.1: Population of study area by broad age group – 2001-21



Source: Lichfields analysis using 2001, 2011 and 2021 Censuses. Interim years are trended.

2.3 Outputs

Scenario 1 – 2014-based SNPP (ONS), 2014-based SNHP (DLUHC)

2.3.1 The 2014-based Sub-National Population Projections (SNPP) were published by ONS in May 2016, with the household projections (published by DLUHC – DCLG at that time) following in Autumn 2016. These projections are not the most recent official population/household projections however they do form the basis of the standard method for calculating local housing need which is set out in the current (DLUHC, 2021) NPPF/PPG, and therefore their implications are considered. These projections have been modelled, re-based to the 2021 Census population, to ensure that the latest demographic information is accounted for. This is the case for all scenarios presented in this report.

2.3.2 Table 2.3.1 summarises the outputs. Across the study area the population is expected to increase by 500,000 in total over the 26-year period (2021-47), yielding growth of 236,000 in the labour supply and supporting 209,000 additional jobs. This population would need an additional 312,000 dwellings, equivalent to 12,000 dwellings per year.

Table 2.3.1: Summary of outputs - Scenario 1: 2014-based SNPP (re-based to 2021)

	Base Year - 2021	Start of construction - 2024	First year of opening - 2029	Interim Assessment Year - 2032
Population	2,457,600	2,534,274	2,646,279	2,706,682
Dwellings*	1,102,697	1,145,337	1,214,235	1,253,720
Labour Supply	1,326,384	1,355,276	1,403,300	1,423,663
Jobs	1,197,901	1,223,511	1,266,326	1,284,343
	Design Year - 2038	Long-term Forecast - 2047	2021-47 Change	
			Total	Annual
Population	2,820,145	2,957,738	500,138	19,236
Dwellings	1,327,192	1,415,066	312,369	12,014
Labour Supply	1,472,205	1,562,320	235,936	9,074
Jobs	1,327,093	1,407,054	209,153	8,044

Source: Lichfields analysis using PopGroup. *Note: Dwelling estimates in base year vary between scenarios which use different underlying household projections.

2.3.3 Outputs for individual local authorities for 2021 and 2047 are provided in Annex 4.

Scenario 2 – 2016-based SNPP (ONS), 2016-based SNHP (ONS)

2.3.4 In summer 2018 ONS published the 2016-based SNPP and associated household projections. When published, the Government directed authorities not to use these as the basis for the standard method because they suggest a significantly lower level of household growth than previous projections (which the Government believes to be inconsistent with its objective of delivering 300,000 homes per year by the mid-2020s). The PPG goes so far as to clarify that:

"Any method which relies on using household projections more recently published than the 2014-based household projections will not be considered to be following the standard method as set out in paragraph 60 of the National Planning Policy Framework. As explained above, it is not considered that these projections provide an appropriate basis for use in the standard method." (PPG ID: 2a-015-20190220).

2.3.5 The projections are however continuing to be used by authorities submitting plans under the previous [2012] NPPF and the Government has reiterated that it does not "*doubt the methodological basis of the 2016-based household projections*". Therefore, the implications of these projections have been tested.

2.3.6 Table 2.3.2 shows the outcomes of this scenario. These projections yield lower population growth than the 2014-based SNPP for the study area, with population growth of 355,000 across the study area over the 26-year period. This population would lead to growth in the labour supply of 162,000, in turn supporting 142,000 jobs, and a need for 232,000 dwellings (just under 9,000 per year).

Table 2.3.2: Summary of outputs - Scenario 2: 2016-based SNPP (re-based to 2021)

	Base Year - 2021	Start of construction - 2024	First year of opening - 2029	Interim Assessment Year - 2032
Population	2,457,600	2,516,008	2,596,949	2,638,642
Dwellings*	1,073,060	1,106,270	1,157,205	1,185,616
Labour Supply	1,326,274	1,347,396	1,382,641	1,395,752
Jobs	1,197,900	1,216,572	1,247,892	1,259,352
	Design Year - 2038	Long-term Forecast - 2047	2021-47 Change	
			Total	Annual
Population	2,715,962	2,812,880	355,279	13,665
Dwellings	1,238,588	1,304,610	231,550	8,906
Labour Supply	1,427,615	1,488,089	161,815	6,224
Jobs	1,286,948	1,339,835	141,935	5,459

Source: Lichfields analysis using PopGroup. *Note: Dwelling estimates in base year vary between scenarios which use different underlying household projections.

Scenario 3a – 2018-based SNPP (ONS), 2018-based SNHP (ONS)

2.3.7 In Summer 2020 ONS published the 2018-based SNPP and associated household projections. These projections indicated lower growth at a national level than both the 2014-based and 2016-based projections as a result of lower international migration assumptions, lower projected fertility rates and lower life expectancy (i.e. higher death rates). Subsequently, projected household growth was also lower than the previous two sets of projections.

2.3.8 Whilst these are the most recent official projections, at the time of writing this report the Planning Practice Guidance continues to direct authorities to use the 2014-based projections for the purposes of the standard method for calculating housing need (as per PPG ID 2a-015, set out above), in part because (as with the 2016-based projections) the 2018-based projections do not align with the objective of delivering 300,000 homes per year. Since they were published in 2020 the Government has not indicated that the 2018-based population/household projections should be used for the purposes of assessing local housing needs; on this basis it is highly unlikely that the 2018-based projections will underpin housing requirements in local plans for any parts of the study area.

2.3.9 Notwithstanding, the Government was not questioning the statistical robustness of these projections and, because these are most recent official projections at the time of writing, their outcomes have been tested. Because they are the most recent official projections, the 2018-based projections (specifically the birth, death and migration rates contained within them) underpin the rest of the scenario assessed within this report (i.e. employment-led scenarios in Section 3.0 and housing-led scenarios in Section 4.0).

2.3.10 Table 2.3.3 shows outcomes under the 2018-based SNPP scenario (re-based to 2021). It suggests population growth over the study area over the period 2021-47 would be just over 177,000, with labour supply growth of 77,000, supporting 69,000 jobs. There would be a need for almost 152,000 dwellings, or just under 6,000 per year.

Table 2.3.3: Summary of outputs - Scenario 3a: 2018-based SNPP (re-based to 2021)

	Base Year - 2021	Start of construction - 2024	First year of opening - 2029	Interim Assessment Year - 2032
Population	2,457,600	2,488,775	2,525,664	2,543,764
Dwellings	1,072,882	1,095,412	1,129,012	1,147,649
Labour Supply	1,326,030	1,336,392	1,356,436	1,361,179
Jobs	1,197,900	1,207,762	1,226,315	1,230,647
	Design Year - 2038	Long-term Forecast - 2047	2021-47 Change	
			Total	Annual
Population	2,580,034	2,634,872	177,272	6,818
Dwellings	1,182,556	1,224,592	151,710	5,835
Labour Supply	1,374,463	1,403,129	77,099	2,965
Jobs	1,242,159	1,266,933	69,033	2,655

Source: Lichfields analysis using PopGroup

Scenario 3b – 2018-based SNPP (ONS), headship rate adjustment

2.3.11 It is widely acknowledged that household representatives rates[11] have been falling, particularly for younger people who are struggling to access housing. The previous [2014] PPG stated that when undertaking an objective assessment of housing need, plan-makers should consider whether household formation rates have been supressed historically, and if so, reflect this in the assessment of need. To test the potential effect this could have on housing need, the housing outcomes arising from the assumption that formation rates for people under age 34 return to their 2001 levels[12] have been assessed.

2.3.12 The population, labour supply and job outputs under this scenario are the same as in Scenario 3a because both scenarios are based on the same population; the 2018-based SNPP (re-based to 2021). However, because Scenario 3b includes some uplift in household formation rates, the number of dwellings needed to support this population is higher; a total of 181,000 dwellings over the 28-year period, or 7,000 per annum, as shown in Table 2.3.3. This is an uplift of 19% on the number of homes compared to Scenario 3a.

Table 2.3.4: Summary of dwelling outputs - Scenario 3b – 2018-based SNPP (re-based to 2021), headship rate adjustment

	Base Year - 2021	Start of construction - 2024	First year of opening - 2029	Interim Assessment Year - 2032
Dwellings	1,077,481	1,109,656	1,158,798	1,180,754
	Design Year - 2038	Long-term Forecast - 2047	2021-47 Change	
			Total	Annual
Dwellings	1,217,070	1,258,521	181,041	6,963

Source: Lichfields analysis using PopGroup

2.4 Summary

2.4.1 For the purposes of this summary (and subsequent summaries), figures in the text are rounded.

2.4.2 Table 2.4.1 and Diagram 2.4.1 summarise the outcomes of the five demographic scenarios for the study area. As expected, the 2014-based SNPP (Scenario 1) projects the highest level of population growth (500,000) and housing need (312,000). The resulting labour force growth of 236,000 would support an estimated 209,000 jobs over the 2021-47 period.

2.4.3 Growth is lower under the 2016-based SNPP (Scenario 2), with population growth of 355,000 over the 26 years to 2047, supporting around 142,000 additional jobs and with a dwelling need of 232,000.

2.4.4 The 2018-based SNPP (Scenario 3a/3b) projects even lower growth than the 2016-based SNPP although it should be noted that neither the 2016-based nor the 2018-based projections will likely form the basis of plan-making in the study area over the long term. The 2018-based SNPP (re-based to 2021) projects population growth of 177,000 over the 26 years to 2047, with an estimated dwelling need of between 152,000 and 181,000 (depending on assumptions around headship rates). The 2018-based SNPP is expected to yield labour force growth of 77,000, supporting 69,000 jobs.

[11] Also known as household formation rates or HFRs or HRRs – this is the proportion of people in a given age group who would form their own household

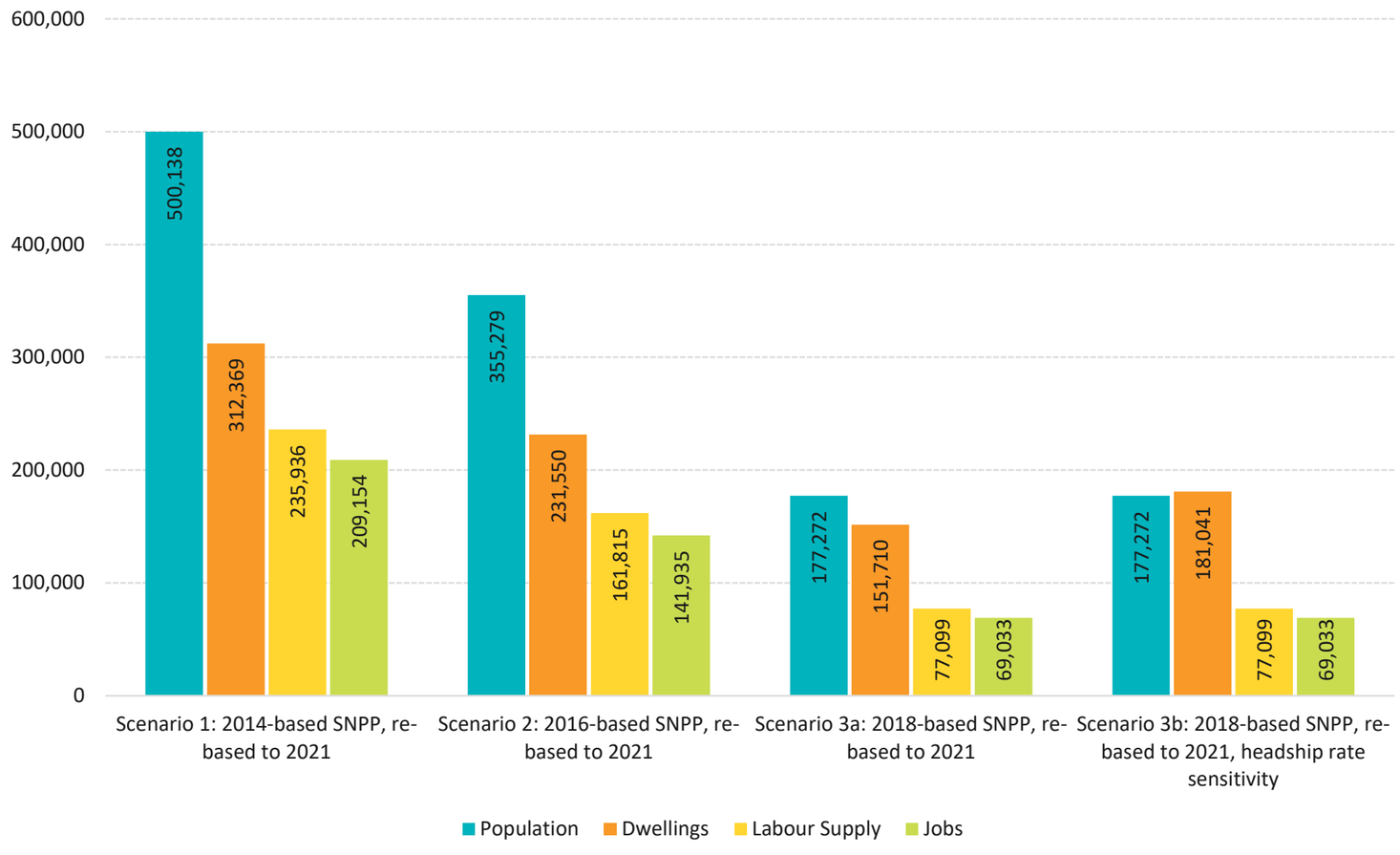
[12] By 2030, where the 2001 level is above the level projected in 2030 in the official projections.

Table 2.4.1: Summary of Demographic scenarios – total change across study area – 2021-47

	Scenario 1	Scenario 2	Scenario 3a	Scenario 3b
Population	500,138	355,279	177,272	177,272
Dwellings	312,369	231,550	151,710	181,041
Labour Supply	235,936	161,815	77,099	77,099
Jobs	209,154	141,935	69,033	69,033

Source: Lichfields

Diagram 2.4.1: Summary of Demographic scenarios – total change across study area – 2021-47



Source: Lichfields

3 Employment-led scenarios

3.1.1 Economic impact work by Oxera and ICF has assessed the potential employment impact of the Project; further detail on how those employment estimates have been derived is set out within ES Appendix 17.9.2. Oxera's employment estimates provide a local authority breakdown of jobs associated with Gatwick for 37 authorities across Kent, Surrey, Sussex and Greater London (known as the Six Authorities Area) – this is a larger area than the study area which is considered in this report, which comprises the 17 authorities shown in Diagram 1.2.1.

3.1.2 Table 3.1.1 summarises the **total** amount (nationally) of direct, indirect and induced employment associated with Gatwick according to Oxera/ICF's estimates, with and without the Project (the difference being those jobs associated with the Project). Oxera then provides an estimate of the total number of catalytic jobs associated with the Project. By 2032 (when the peak in jobs is expected), the Project is expected to support c.16,800 jobs (c.3,100 direct, c.2,700 indirect, c.4,500 induced and 7,600 catalytic). By 2047 (the long-term forecast year) this is expected to fall slightly to c.15,700 jobs in total.

3.1.3 On this basis, any 'peak' in housing demand associated with labour demand from the Project is likely to occur in 2032. However, outputs have been modelled to 2047 (the long-term forecast year) for consistency with the rest of the ES.

Table 3.1.1: Employment associated with Gatwick - Total

	2029	2032	2038	2047
Direct				
Without Project	27,609	28,077	28,770	29,721
With Project	28,596	31,199	31,985	32,822
Difference	**987**	**3,122**	**3,215**	**3,101**
Indirect				
Without Project	24,145	24,551	25,164	25,998
With Project	25,008	27,280	27,976	28,711
Difference	**863**	**2,730**	**2,812**	**2,713**
Induced				
Without Project	30,007	30,512	31,274	32,311
With Project	31,080	33,904	34,769	35,682
Difference	**1,073**	**3,392**	**3,495**	**3,371**
Catalytic				
Jobs resulting from Project	**2,473**	**7,593**	**7,152**	**6,491**
Total				
Total Project Jobs	**5,396**	**16,837**	**16,674**	**15,676**

Source: Oxera/ICF

3.1.4 Looking specifically at additional employment the Project would generate within the **study area** (which covers the 17 authorities shown in Diagram 1.2.1 in Section 1.0), the Oxera/ICF work suggests the Project could lead to an additional c.9,500 jobs (direct, indirect, induced and catalytic) at its peak (2032), as shown in Table 3.1.2. In the long-term forecast year (2047) this falls to c.8,700 jobs. This fall in the long-term forecast year is primary associated with a decline in the number of catalytic jobs (a fall of c.1,000 jobs); the number of direct, indirect and induced jobs is relatively stable over the 2032 to 2047 period.

3.1.5 Compared with the previous version of this report, there is no change to the number of direct jobs associated with the Project within the study area. The numbers of indirect, induced and catalytic jobs have been refined by Oxera and ICF in their ongoing assessment of employment associated with the Project, and as a result these employment estimates vary slightly from those presented in previous versions of this report.

Table 3.1.2: Summary of additional workers associated with the Project (direct, indirect, induced and catalytic) in the study area (17 authorities) at 2029, 2032, 2038 and 2047

	2029	2032	2038	2047
Direct	703	2,260	2,290	2,209
Indirect	365	1,153	1,188	1,146
Induced	366	1,156	1,191	1,149
Catalytic	1,596	4,902	4,617	4,190
Total	**3,030**	**9,471**	**9,286**	**8,694**

Source: Oxera

3.1.6 Table 3.1.3 shows the breakdown of the additional jobs in the study area by authority; as expected the majority of the additional jobs are associated with Crawley itself (c.1,800 workers at peak demand in 2032 and 2038), falling slightly to c.1,700 in the long-term (2047). The project would be expected to yield the greatest number of jobs in authorities nearest to or with functional links to Gatwick, notably Brighton and Hove, Croydon, Reigate and Banstead, Mid Sussex and Horsham.

Table 3.1.3: Jobs (direct, indirect, induced and catalytic) associated with the Project at Gatwick by local authority

	2029	2032	2038	2047
Adur	55	172	168	157
Arun	102	316	307	284
Brighton and Hove	410	1,272	1,223	1,129
Chichester	87	269	260	241
Crawley	565	1,793	1,807	1,727
Croydon	291	906	879	816
Eastbourne	84	260	251	232
Elmbridge	87	270	261	242
Epsom and Ewell	64	197	191	177
Horsham	241	753	741	696
Lewes	98	306	296	274
Mid Sussex	243	762	752	708
Mole Valley	105	327	320	299
Reigate and Banstead	263	826	817	770
Tandridge	107	332	325	303
Wealden	129	402	389	361
Worthing	99	307	299	279
Study Area total	**3,030**	**9,471**	**9,286**	**8,694**

Source: Oxera

3.1.7 The assumption has been made that the underlying employment forecasts used in this assessment (which are set out below in

Section 3.2) would include baseline job growth at Gatwick without the Project. This is on the basis that it reflects a trend-based view of the underlying growth of the economy without cognisance of specific changes in infrastructure provision at Gatwick. These are the changes which trigger additional employment growth. Therefore the 9,500 additional jobs expected to arise from the Project as set out above – as calculated by Oxera - have been added to the number of jobs set out within the CE forecasts.

3.1.8 This is however likely to generate a 'worst-case scenario' from a labour demand perspective because some Project jobs may displace or substitute other jobs within the CE forecast. If this occurs, this will yield a lower labour demand, and therefore lower housing demand, than assessed within this report.

3.1.9 Furthermore, the modelling through PopGroup assumes that commuting, unemployment and economic activity are fixed over the forecast period based on the inputted assumptions[13]. In reality, external factors (such as increased labour demand) could reasonably result in changes to unemployment, economic activity and/or commuting to balance labour supply and demand without necessarily the need for additional housing.

3.1.10 If either of the above occurs then the effect would be a lower labour market demand than is set out below in Scenarios 5 and 7.

3.2 Context

3.2.1 For the purposes of this assessment employment forecasts for the authorities in the study area have been obtained from two sources:

- Cambridge Econometrics ("CE"). Further information on the assumptions underpinning CE's March 2022 can be found at Annex 5; and
- Experian. Further information on the assumptions underpinning Experian's March 2022 forecast can be found in its methodology document which is included at Annex 6 (specifically Section 4 which sets out key assumptions around UK economic growth).

3.2.2 For consistency the March 2022 forecasts have been obtained from both sources. Employment forecasts for each can be found at Annex 7.

3.2.3 For the reasons set out below, the CE forecasts align closely with the current levels of employment underpinning local plans within the study area (on aggregate) and are therefore Lichfields' preferred forecasts for establishing what level of future employment growth might occur. The CE forecasts are therefore the forecasts which underpin the broad conclusions of this report. However, it was requested by a number of local authorities during consultation that the report also consider Experian forecasts, as some authorities draw upon Experian within their evidence base. For this reason, Experian is considered within the report, but does not underpin Lichfields conclusions regarding population and housing effects for the reasons set out.

Past trends

3.2.4 Cambridge Econometrics has been used as the basis for analysing past trends as it provides data further back in time (1981 compared to 1997 in Experian) however Diagram 3.2.1 shows that Experian historic trends broadly follow those of CE for the years for which data is available.

3.2.5 In the last 10 years (2011-21) CE suggests the number of jobs in the study area has grown by 8.9%; higher than growth seen in the both the 1990s (6.5%) and 2000s (when the number of jobs declined by 1.1%) as shown in Table 3.2.1 (and Diagram 3.2.1). This is however lower than growth seen in the 1980s of 16.8%.

Table 3.2.1: Historic job trends for the study area – Cambridge Econometrics

	Jobs	Total Change	Total Change (%)	Annual Change	Annual Change (%)
1981	894,500				
1991	1,045,100	150,600	16.8%	15,060	1.7%
2001	1,112,400	67,300	6.4%	6,730	0.6%
2011	1,100,100	-12,300	-1.1%	-1,230	-0.1%
2021	1,197,900	97,800	8.9%	9,780	0.9%

Source: Cambridge Econometrics (March 2022)

3.2.6 As of 2021 CE suggests there are 1,197,900 jobs in the study area; broadly comparable to Experian which suggests there are 1,191,800.

Future forecasts

3.2.7 CE forecasts that employment will increase in the study area over the period to 2041, at a lower rate than that seen in the 1980s, 1990s or 2010s. It forecasts growth of 0.5% per year for the next 10 years, before falling to 0.3% per year over the medium to longer term, as shown in Table 3.2.2. In total over the 2021-47 period CE forecasts growth of 119,400 jobs. Accounting for the Project (expected to generate up to an additional 8,694 jobs in the study area by 2047) the total amount of employment growth over the period would be 128,094.

Table 3.2.2: Job forecasts for the study area – Cambridge Econometrics

	Jobs	Total Change	Total Change (%)	Annual Change	Annual Change (%)
2021	1,197,900	~	~	~	~
2031	1,258,000	60,100	5.0%	6,010	0.5%
2041	1,296,800	38,800	3.1%	3,880	0.3%
2047	1,317,300	20,500	1.6%	3,417	0.3%
2021-47	~	119,400	10.0%	4,592	0.4%

Source: Cambridge Econometrics (March 2022)

3.2.8 Table 3.2.3 below shows the Experian forecasts also over the period 2021-47. This forecasts much higher growth than CE, and assumes that the rate of growth seen over the last decade (as shown above in Table 3.2.1 – 0.9% per annum) will be broadly sustained. This would suggest growth in the number of jobs of just under 268,000 across the study area by 2047; more than double that suggested by CE. Accounting for the Project (which is expected to support up to an additional 8,964 jobs by 2047) total growth over the 2021-47 period would be 274,525 when using the Experian forecast as the baseline.

[13] Either at current levels or based on the underlying assumptions which are detailed in Annex 2. The PopGroup model does not flex assumptions around commuting, unemployment and economic activity based on job demand.

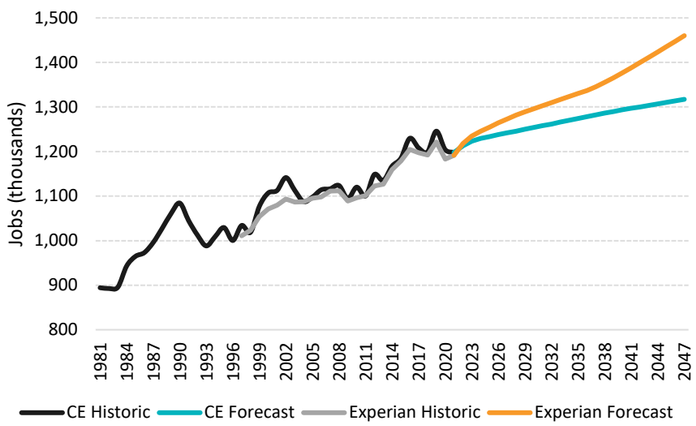
Table 3.2.3: Job forecasts for the study area - Experian

	Jobs	Total Change	Total Change (%)	Annual Change	Annual Change (%)
2021	1,191,800	~	~	~	~
2031	1,302,900	111,100	9.3%	11,110	0.9%
2041	1,387,900	85,000	6.5%	8,500	0.7%
2047*	1,459,678	71,778	5.2%	11,963	0.9%
2021-47	~	267,878	22.5%	10,303	0.9%

Source: Experian (March 2022). *Note: Experian forecasts only run to 2042, therefore in order to obtain a forecast for 2047 the annual growth rate for 2041/42 has been trended.

3.2.9 Diagram 3.2.1 shows the historic and forecast trends from both CE and Experian.

Diagram 3.2.1: Historic and Forecast total jobs - Study area (1981 onwards) – without Project



Source: Cambridge Econometrics (March 2022) and Experian (March 2022)

3.2.10 A comparison of the total change and annual change in Cambridge Econometrics and Experian is shown in Table 3.2.4 below. Overall, Experian forecasts job growth 124% higher (+148,000 jobs) than Cambridge Econometrics. The difference varies amongst local authorities, with Wealden, Lewes, Arun and Mid Sussex seeing the smallest differences (33% or less). The differences are most significant in Crawley (where Experian forecast growth of 21,000 jobs compared with 3,400 by CE – a difference of 518%) and in Worthing (16,700 compared with 2,700, also a difference of 518%). In most other authorities, Experian forecast growth around 2-3 times that of CE (i.e. increases of around 100-200%).

Table 3.2.4: Comparison of forecast job growth between Cambridge Econometrics and Experian (2021-47)

	Cambridge Econometrics		Experian*		Difference – Experian vs. CE	
	Total Change	Annual Change	Total Change	Annual Change	Total	As a %
Adur	3,200	123	5,121	197	1,921	60%
Arun	4,700	181	6,223	239	1,523	32%
Brighton and Hove	23,500	904	52,881	2,034	29,381	125%
Chichester	7,500	288	15,584	599	8,084	108%
Crawley	3,400	131	21,028	809	17,628	518%
Croydon	11,600	446	31,688	1,219	20,088	173%
Eastbourne	4,200	162	8,446	325	4,246	101%
Elmbridge	7,600	292	14,467	556	6,867	90%
Epsom & Ewell	3,600	138	9,858	379	6,258	175%
Horsham	5,900	227	12,672	487	6,772	115%
Lewes	6,700	258	7,428	286	728	11%
Mid Sussex	6,500	250	8,632	332	2,132	33%
Mole Valley	4,400	169	12,059	464	7,659	175%
Reigate & Banstead	9,100	350	26,717	1,028	17,617	194%
Tandridge	3,800	146	7,432	286	3,632	96%
Wealden	11,000	423	10,934	421	-66	0%
Worthing	2,700	104	16,709	643	14,009	518%
Total	**119,400**	**4,592**	**267,878**	**10,303**	**148,478**	**124%**

Source: Lichfields analysis of Cambridge Econometrics (March 2022) and Experian (March 2022). *Note: Experian forecasts are only available up to 2042, therefore to obtain job growth between 2042 and 2047 the rate of growth seen between 2041 and 2042 has been applied.

Employment in Local Plans

3.2.11 Analysis has been undertaken of adopted plans to assess the broad scale of job growth being planned for across the study area in currently adopted plans. Whilst some local plans contain specific employment targets within their strategic policies, many do not. However, many local plans set targets for employment floorspace (and did not reference a specific number of jobs in the plan), and therefore a review was conducted of the evidence base to understand the scale of employment growth which was assessed within the evidence base (for example, as set out in an employment land study or economic growth assessment). It should be noted that whilst economic forecasts are referred to in most evidence base documents (typically those from Experian, or in some cases Oxford Economics, which provide job forecasts which are then translated into employment floorspace requirements), in some cases alternative scenarios for employment floorspace were assessed and taken forward in the plan (for example based on past trends or labour supply-led scenarios). However these alternative employment floorspace scenarios often do not have a job figure associated with them as they are for floorspace only, and the amount of jobs they might support is highly dependent on the mix of floorspace by employment type, assumed job densities, vacancy rates and other demand-side factors. For the purposes of consistency, this analysis has taken the baseline forecast within the employment evidence base which underpins each plan, unless there is reason to consider that the amount of job growth likely in a given authority is significantly different to this (in which case a judgment is made about the likely level of job growth, based on the evidence and any other evidence).

3.2.12 Where local plans are significantly out-of-date (i.e. pre-date the publication of the 2012 NPPF) an assessment was conducted of any emerging plans and emerging evidence base documents to assess the likely scale of employment growth in those areas. This review showed the following.

Adur

3.2.13 The Local Plan (2017) plans for 41,000sqm of employment space (Policy 4); its evidence base refers to Experian forecasts from May 2014 which forecast growth of 5,200 jobs 2011-31 (260 per year), which is associated with an employment floorspace requirement of 67,000sqm) but notes that this is 'optimistic' and that growth of 2,000-4,000 is more likely. The supporting evidence acknowledges that the employment floorspace allocated in the plan would not meet demand in full (presumably based on the Experian forecast) but would be sufficient based on labour supply which implies some reduction in out-commuting could be achieved. Notwithstanding, for the purposes of this assessment (and ensuring any job demand associated with local plans is not under-estimated) it has been assumed that job demand in Adur associated with the plan is as per the Experian May 2014 forecast, which equates to 260 jobs per year to 2031.

3.2.14 A review of the Adur Local Plan is in progress however a Regulation 18 plan is not yet published at the time of writing this report. No updated employment evidence is currently available.

Arun

3.2.15 The Local Plan (2018) allocates 75ha of employment land (Policy EMP SP1) and the evidence base refers to a number of scenarios, including a baseline scenario of Experian 2015 which forecast 6,390 jobs 2011-31 (320 per year). The amount of employment land allocated in the plan does not appear to specifically relate to the Experian (or any one) scenario in the evidence base however, and takes into account the need for flexibility, the need to support regeneration and takes into account potential loss of employment land. For the purposes of this assessment it is assumed that job demand in Arun associated with the plan is as per the Experian 2015 forecast of 320 jobs per year to 2031.

3.2.16 A review of the Arun Local Plan is in progress however a Regulation 18 plan is not yet published at the time of writing this report. No updated employment evidence is currently available.

Brighton and Hove

3.2.17 The City Plan Part One (2016) plans for a total of 155,670sqm of employment floorspace (Policy CP3). The evidence base refers to Experian May 2012 forecasts of 20,080 jobs in the 2010-30 period (1,004 per year) which is associated with a requirement for 86,710sqm, as well as past trends scenarios and labour supply scenarios for floorspace requirements. Whilst these alternative floorspace scenarios suggested a greater employment floorspace requirement, analysis within the evidence base of the implied annual job growth associated with these scenarios was typically similar to or lower than the Experian forecast. For the purposes of this assessment it has been assumed that job demand in Brighton and Hove associated with the plan is as per the Experian 2012 forecast, which equates to 1,004 jobs per year to 2030.

3.2.18 A review of the plan is in progress with Regulation 18 consultation expected in late 2023. No updated employment evidence is currently available.

Chichester

3.2.19 The Local Plan (2015) links planned employment growth to labour supply (based on housing supply) because the Local Plan was adopted in the knowledge that Chichester was unable to meet its housing need in full. Policy 3 allocates c.25ha of new employment land. The evidence base refers to the Experian 2012 forecast of 7,300 jobs (429 per year) which is higher than the number of jobs that would be supported based on labour supply, however for the purposes of this assessment (and ensuring any job demand associated with local plans is not under-estimated) it has been assumed that job demand in Chichester associated with the plan is as per the Experian May 2012 forecast, which equates to 429 jobs per year to the end of the plan period, 2029.

3.2.20 As part of its Local Plan Review, Chichester Council has published more recent evidence on employment needs (dated 2022) – no reference is made to Experian within this evidence. Job growth forecasts referred to are Oxford Economics October 2021 forecast of 5,700 jobs 2021-39 (317 per annum) however this has been adjusted within the evidence and gives a higher scenario of 9,800 (544 per annum) on the basis of planned growth (e.g. at University, Southern Gateway, Bunn Leisure) and assuming no decline in agriculture and manufacturing. This suggests slightly higher anticipated job growth than the forecast underpinning the current plan.

Crawley

3.2.21 The Local Plan (2015) Policy EC1 allocated 23ha of employment land within the borough, but acknowledges that up to 35ha may be required. The evidence base refers to Experian 2014 forecasts of 15,160 jobs 2015-30 (1,011 per year) as well as higher growth scenarios of c.18,000-21,000 jobs. The evidence concluded that taking into account pipeline supply of sites, Crawley had sufficient sites to meet its overall baseline requirement up to 2030 if safeguarded sites were included, although there was some uncertainty in the longer term. For the purposes of this assessment it has been assumed that job demand in Crawley associated with the plan is as per the Experian 2014 forecast, which equates to 1,011 jobs per year to 2030.

3.2.22 Crawley is in the process of preparing a Local Plan Review with the Regulation 19 consultation closing in June 2021 (however subsequent progress has stalled owing to the need to resolve water neutrality issues). The employment evidence base is summarised in the Local Plan Review Topic Paper on Employment (January 2021) which refers to Oxford Economics and Experian forecasts from 2018 and 2020. It concludes the Borough will plan for 38.7ha of employment space (its full need) within its boundary – this is associated with a 2018 Experian forecast which anticipates 14,800 jobs 2019-36 (870 per year). This suggests a slight slow down in levels of anticipated growth in Crawley over the longer term compared with forecasts which underpin the current plan.

Croydon

3.2.23 The Local Plan (2018) Policy SP3 sets out that the Council will promote and support the development of new and refurbished office space, including 92,000sqm in Croydon Metropolitan Centre and up to 7,000sqm in other District Centres. The plan does not refer to anticipated overall employment growth levels, however does refer to employment associated with specific sites/regeneration initiatives (these are not necessarily net jobs however). The Inspector's report confirms that the approach adopted in the plan is not based on projections of population or economic forecasts, rather is driven by Croydon's role as set out in the London Plan. Hence, rather than containing specific targets for employment or associated activity, the plan adopts a criteria-based approach to the release of employment sites, criteria which are based on market-led analysis.

3.2.24 The employment evidence underpinning the plan is based on trend-based employment forecasts by the Greater London Authority which expects an overall decline in the number of jobs in Croydon of -16,000 between 2011-31 (-800 per year), which reflected recent trends (seen between 2008 and 2011) of a decline in the number of jobs in the Borough and an anticipated decline in the number of industrial jobs. For the purposes of this assessment the anticipated level of job change within the evidence base, i.e. -800 jobs per year to 2031 (note that this is a shorter time horizon than the Local Plan, which runs to 2036) has been applied.

3.2.25 The Croydon Local Plan Review is expected to be submitted for examination after Summer 2022. An Employment Land review update has been published and the highest growth scenario (based on Experian 2020) forecasts growth of 14,700 jobs 2018-39, or 700 per annum.

Eastbourne

3.2.26 The Eastbourne Employment Land Local Plan (2016) sets a requirement for 48,750sqm of employment floorspace (Policy EL1). The evidence base refers to the Experian May 2013 forecast of 2,500 jobs in the 2006-27 period (119 per year) or 3,100 jobs by 2031, which is associated with a floorspace requirement of 20,247sqm, and other scenarios are presented with higher floorspace requirements but not necessarily higher jobs forecasts. A 'synthesis' scenario which underpins the floorspace taken forward in the Local Plan forecast is associated with a slightly lower level of employment growth than Experian, however for the purposes of this assessment (and ensuring any job demand associated with local plans is not under-estimated) it

has been assumed that job demand in Eastbourne associated with the plan is as per the Experian May 2013 forecast, which equates to 119 jobs per year to 2027 (the horizon of the Local Plan).

3.2.27 As part of its emerging Local Plan Eastbourne Council is undertaking a Growth strategy consultation (November 2022 to January 2023). An Economic Development Needs Assessment (2017) has been published and the highest growth scenario is the 'Baseline' Job Growth scenario (Experian 2017) which forecasts 9,400 jobs 2015-35, or 470 per annum. A subsequent April 2022 employment study anticipates much lower growth of 3,100 jobs over the 2021-39 period, or 170 per year based on Cambridge Econometrics March 2021 forecast.

Elmbridge

3.2.28 The current local plan pre-dates the publication of the 2012 NPPF and does not contain specific employment targets. Policy CS23 notes that employment land supply is limited and growth is likely to be achieved through intensification rather than new sites.

3.2.29 Elmbridge's emerging local plan is supported by a Commercial Study (2017) which uses Experian employment forecasts (2016) which indicate overall job growth of 10,100 jobs and 69,120sqm employment floorspace between 2015-2035 (note that this does not align with proposed plan period, which is 2022-2037). This equates to 505 jobs per year. The Regulation 19 consultation closed in July 2022 with the emerging plan proposing a 'maintain and optimise' approach to employment (i.e. no significant planned new growth).

Epsom and Ewell

3.2.30 The current local plan pre-dates the 2012 NPPF. Adopted policy does not identify a need/supply of additional employment land, instead focusing on protecting loss of employment land, regeneration and intensification (Policy CS11).

3.2.31 The emerging local plan is in its early stages, with the Council completing its call for sites in March 2022; a Regulation 18 plan is yet to be published. Emerging evidence sets out a mid-range forecast of additional employment space demand (2017-37, not the emerging local plan period which is 2022-2040) based on growth of local business units, GDP forecasts and projected employment growth of 49,285sqm. No associated job figure is given within the evidence however Lichfields[14] estimates that this equates to 1,975 jobs (99 per year).

Horsham

3.2.32 The current District Planning Framework (2015) only quantifies floorspace for a new business park North of Horsham (Policy SD2). Evidence base supporting the Framework refers to employment forecasts based on Experian (May 2013) which projects total job growth of 8,890 jobs 2011-31 (445 per year). For the purposes of this assessment, it is assumed that the job demand associated with the plan is as per the Experian 2013 forecast of 445 jobs per year.

3.2.33 The Regulation 19 consultation of the emerging local plan was due to be published in 2021 but has been 'unforeseeably' delayed due to nutrient neutrality. The emerging evidence base (Economic Growth Assessment 2020) relies on 2018 and 2020 Oxford Economics forecasts (c.5,000-6,000 jobs 2019-37, 280-330 per year) and labour supply scenarios associated with higher housing delivery (no employment estimates are given for these latter scenarios however floorspace requirements are substantially higher than the OE forecasts).

Lewes

3.2.34 The Core Strategy (2016 – a joint plan with the South Downs National Park) sets a requirement for 74,000sqm of employment floorspace over the 2012-31 period. The evidence base refers to Experian 2012 forecasts of 2,832 jobs 2012-31 (149 per year) however the amount of employment floorspace in the Core Strategy reflected a higher employment land scenario based on longer term trends in floorspace completions. No associated job figure is given, however Lichfields estimates (based on the quantum and mix of floorspace) the job forecast associated with the higher floorspace scenario is slightly lower than the Experian. For the purposes of this assessment, and to ensure the job demand associated with the plan is not under-estimated, it is assumed that the job demand associated with the plan is as per the Experian 2012 forecast of 149 jobs per year.

3.2.35 After the adoption of the Core Strategy a partial update to the Employment Land Review was completed for Newhaven specifically in the context of the potential implementation of Article 4 Directions in the town. This update assessed future job growth for Lewes associated with an Experian March 2017 forecast of 7,400 jobs 2010-30 (370 per year) which translated into a floorspace requirement of 35,580sqm (other trend-based scenarios suggested a lower employment land requirement). Whilst a higher job growth forecast than the earlier evidence, the floorspace requirement fits within the broader parameters for Lewes overall set by the Core Strategy (2016). In any event, this evidence was not prepared for the purposes of plan-making across the local authority as a whole and the level of job growth has yet to be formalised in any adopted policy. For the purposes of this assessment it is assumed that the level of job demand associated with the Lewes Core Strategy is as per the Experian 2012 forecasts, of 149 jobs per year.

3.2.36 The Council is currently preparing a new local plan however has yet to prepare any updated employment evidence.

Mid Sussex

3.2.37 The District Plan (2018) allocates 25-30ha of employment space in Policy DP1. The evidence base refers to Experian forecasts from May 2013 which forecast growth of 10,425 to 2031 (543 per year over the plan period). For the purposes of this assessment, 543 jobs per year is assumed to be the basis of job demand in the current Mid Sussex plan.

3.2.38 A draft Local Plan update (Regulation 18) consultation was undertaken between November and December 2022. The employment evidence base refers to Experian (September 2021) forecasts which suggest growth of 5,500 jobs 2021-38 (324 per year) which is associated with a requirement for 9.1ha of employment land. Alternative scenarios based on past development rates and labour supply are presented however these only give employment floorspace requirements, not jobs. An employment land requirement of 27.1ha is taken forward in the draft Local Plan; this is associated with the 'labour supply' scenario (which is based on housing growth as per the standard method, of 1,093 dwellings per annum). Based on committed supply the draft Local Plan concludes the overall requirement for 27.1ha is met.

[14] On the basis of the amount of floorspace by type (office, industrial, distribution, etc) and employment densities from HCA 2015 & NLP Employment Densities Guide 2016

Mole Valley

3.2.39 The adopted Local Plan pre-dates the 2012 NPPF and contains no employment targets.

3.2.40 Evidence underpinning the emerging plan uses Experian employment forecasts (June 2016) which forecasts job growth of 1,300 jobs (76 per year over the period to 2037) with a surplus overall floorspace requirement of 48,808sqm. The emerging plan (Policy EC2) states the Council has decided to plan on the basis that no new employment space is required but will re-examine this policy at the Plan's five-year review. The emerging local plan was submitted for examination in February 2022.

Reigate & Banstead

3.2.41 The Core Strategy (adopted in 2014 and reviewed by the Council in 2019) sets an employment floorspace requirement of 46,000sqm. The evidence sets out job growth based on Experian forecasts (September 2015) which indicate an overall growth of 6,530 jobs over the period 2015-27 (544 per year).

3.2.42 Reigate & Banstead is not preparing an update to its Core Strategy at the time of preparing this report.

Tandridge

3.2.43 The adopted Local Plan pre-dates the 2012 NPPF and does not identify an overall requirement for employment floorspace/land or job figure.

3.2.44 The emerging plan was submitted for examination in January 2019 and at the time of writing this report is still undergoing examination. Emerging policy TLP20 requires at least 15.3ha of additional employment land, and the supporting evidence refers to Experian forecasts March 2017 which show 7,700 job growth over the 2013-33 period (385 per year).

Wealden

3.2.45 The Core Strategy (2013) is based on evidence which refers to Experian forecasts Spring 2007 of 7,700 jobs 2006-27 (385 per year);

3.2.46 The emerging local plan was withdrawn in February 2020. Regulation 18 consultation was expected in Spring 2022 (according to the latest Local Development Scheme), however the latest update from the Council at the time of writing this report is that the emerging plan timescale is being revised due to uncertainty relating to housing requirement and national planning reform. Economic evidence was produced in April 2022 and refers to Cambridge Econometrics Forecasts dated March 2021, which suggest job growth of 8,800 over the 2021-39 period (490 per year).

Worthing

3.2.47 The Worthing Core Strategy pre-dates the 2012 NPPF and contains no employment floorspace targets or job figures. However, Worthing's new local plan was found sound in October 2022 and therefore for the purposes of this assessment is assumed to represent the currently adopted plan. The employment land requirement is underpinned by evidence which refers to Experian 2020 forecasts of 7,500 jobs over the 2020-36 period (469 per year).

Summary

3.2.48 On the basis of adopted plans only (including Worthing), plans (or their underlying economic evidence base) have an average horizon to 2031 and forecast a total of 4,821 jobs per year, as shown in Table 3.2.5. If Croydon's employment growth is assumed to be zero (rather than the negative growth set out in the employment evidence base) this would be 5,621 jobs per year.

3.2.49 When employment growth forecasts set out in the evidence base of emerging plans in the authorities which do not have post-2012 NPPF plans (Elmbridge, Epsom and Ewell, Mole Valley and Tandridge) are included, the average horizon is to 2032 with a total of 5,886 jobs per year across the study area. This is very similar to the level of job growth forecast in the Cambridge Econometrics March 2022 forecast for the study area of 5,800 jobs per year to 2032 (this rises to 6,952 if the Project jobs are included). It is lower than the comparable Experian forecast, as shown in Table 3.2.5.

3.2.50 If the level of job growth in all emerging plan evidence bases are taken into account, the average horizon is to 2035 with a total of 8,012 jobs per year across the study area, compared with 5,450 per year over the same horizon in the Cambridge Econometrics forecast (6,357 per year with the Project) and 9,900 per year in the Experian forecast (10,808 with the Project).

Table 3.2.5 Comparison of employment growth underpinning plans and Cambridge/Experian forecasts used in this report

	End date *	Jobs per year	Croydon sensitivity	Cambridge March 2022 (with Project)	Experian March 2022 (with Project)
Adopted only	2031	4,821	5,621	~	~
Adopted and emerging	2032	5,886	6,686	5,800 (6,952)	10,727 (11,879)
All emerging	2035	8,012	~	5,450 (6,357)	9,900 (10,808)

Source: Lichfields analysis of local plans, Cambridge Econometrics and Experian forecasts.
*End dates are the average end date of plans/evidence for the relevant authorities.

3.2.51 This analysis shows that the amount of employment growth which is currently being planned for by the local authorities in the study area collectively is comparable to the Cambridge Econometrics forecasts which underpin the analysis within this report, despite the employment forecasts in the evidence bases coming from a range of sources and timeframes. This observation is important for the purposes of our analysis of labour supply and job demand, including the conclusions on the impact of the Project, which are set out in Section 5.0 of this report.

3.3 Outputs

Scenario 4a – Cambridge Econometrics Forecast (March 2022)

3.3.1 CE forecasts the number of jobs in the study area to rise to 1.32m by 2047. To provide the labour force sufficient to support this forecast of job growth[15] would require population growth of 278,000 over the 26-year period and housing growth of 194,000 (just under 7,500 per annum), as shown in Table 3.3.1.

[15] Assuming base year [2021] commuting patterns remain constant, and that unemployment and economic activity change in line with the inputs/assumptions set out at Annex 2 of this report.

Table 3.3.1: Summary of outputs – Scenario 4a: Cambridge Econometrics Forecast (March 2022)

	Base Year - 2021	Start of construction - 2024	First year of opening - 2029	Interim Assessment Year - 2032
Population	2,457,600	2,529,473	2,574,994	2,607,693
Dwellings	1,072,882	1,110,891	1,148,290	1,172,866
Labour Supply	1,326,030	1,361,944	1,385,243	1,398,328
Jobs	1,197,900	1,229,400	1,250,000	1,261,700
	Design Year - 2038	Long-term Forecast - 2047	2021-47 Change	
			Total	Annual
Population	2,668,545	2,734,339	276,739	10,644
Dwellings	1,218,873	1,267,034	194,151	7,467
Labour Supply	1,425,374	1,460,234	134,204	5,162
Jobs	1,285,900	1,317,300	119,400	4,592

Source: Lichfields analysis using PopGroup

3.3.2 Of the demographic scenarios assessed, only Scenario 3 (a/b – the 2018-based SNPP) would not provide sufficient population growth and labour supply to support Cambridge Econometrics' forecast job growth. However, to assess whether future job growth associated with the Project (combined with underlying job growth) is likely to impact upon the demand for housing in the study area, it is more appropriate to compare the labour supply needed to support job growth (based on CE's forecast, with or without the project) with the labour supply generated based on likely levels of housing growth. The population and labour supply generated by planned levels of housing growth may differ to official demographic projections (which are trend-based and take no account of external factors which might drive population growth, such as planned levels of housing growth). The population and labour supply impacts associated with various future levels of housing growth are assessed in Section 4.0 of this report and a labour supply comparison of the relevant scenarios in set out in Section 5.0.

Scenario 4b – Cambridge Econometrics Forecast (March 2022) with headship rate adjustment

3.3.3 When an adjustment to headship rates is taken into account (using the same approach as set out for Scenario 3b) the number of homes needed to support job growth in the CE forecast increases to 225,000 dwellings, or around 8,700 dwellings per annum across the study area between 2021 and 2047, as shown in Table 3.3.2. This is a 16% increase on Scenario 4a.

Table 3.3.2: Summary of dwelling outputs – Scenario 4b: Cambridge Econometrics forecast with headship rate adjustment

	Base Year - 2021	Start of construction - 2024	First year of opening - 2029	Interim Assessment Year - 2032
Dwellings	1,077,481	1,125,566	1,178,943	1,207,157
	Design Year - 2038	Long-term Forecast - 2047	2021-47 Change	
			Total	Annual
Dwellings	1,254,935	1,302,637	225,156	8,660

Source: Lichfields analysis using PopGroup

Scenario 5a – Cambridge Econometrics Forecast (March 2022), with the Project

3.3.4 To support the 1.32m jobs in 2047 forecast by CE, an estimated labour supply of 1.46m would be needed (see Table 3.3.1 above). This takes into account unemployment and commuting patterns (which are held constant at 2021 rates), which mean the study area is likely to need slightly more growth in workers living locally than jobs.

3.3.5 If the additional jobs associated with the Project (8,694 by 2047) were added to this CE forecast (i.e. assuming 100% additionality), this would imply the labour supply needs to increase by 9,197, as shown in Table 3.3.3 below. For the reasons set out above in 3.1.8, this is likely to over-estimate the actual demand for labour associated with the Project, but this has been assessed within this report as a worst-case scenario from a housing demand perspective.

Table 3.3.3: Labour supply requirements associated with the CE Forecast, with and without the Project, long-term forecast year (2047)

	Labour supply needed in 2047	Jobs in 2047
CE Forecast	1,460,234	1,317,300
CE Forecast with Project	1,469,431	1,325,994
Difference	+9,197	+8,694

Source: Lichfields based on CE/Oxera

3.3.6 To generate the additional labour supply of 9,197 (compared with the CE forecast alone – Scenario 4a) would require an additional 16,671 people and an additional 7,340 dwellings. In total, the population growth needed to support the CE forecast with the Project (assuming 100% additionality for the Project jobs, a worst-case scenario) would be 293,000 over the period to 2037 with a need for 201,000 additional dwellings, or 7,800 dwellings per annum, as shown in Table 3.3.4.

Table 3.3.4: Summary of outputs – Scenario 5a: Cambridge Econometrics Forecast (March 2022) with additional jobs from the Project

	Base Year - 2021	Start of construction - 2024	First year of opening - 2029	Interim Assessment Year - 2032
Population	2,457,600	2,529,473	2,579,971	2,623,497
Dwellings	1,072,882	1,110,891	1,150,124	1,178,894
Labour Supply	1,326,030	1,361,944	1,388,464	1,408,385
Jobs	1,197,900	1,229,400	1,253,030	1,271,171
	Design Year - 2038	Long-term Forecast - 2047	2021-47 Change	
			Total	Annual
Population	2,685,444	2,751,010	293,410	11,285
Dwellings	1,225,927	1,274,374	201,492	7,750
Labour Supply	1,435,214	1,469,431	143,401	5,515
Jobs	1,295,186	1,325,994	128,094	4,927

Source: Lichfields analysis using PopGroup

3.3.7 The only demographic scenario assessed which would not provide the labour force necessary to support this level of job growth would be Scenario 3 (a/b – the 2018-based SNPP) however for the reasons mentioned earlier these projections are unlikely to underpin plan-making in the study area and therefore a comparison with planned housing supply is more appropriate.

Scenario 5b – Cambridge Econometrics Forecast (March 2022), with the Project with headship rate adjustment

3.3.8 With an adjustment for headship rates, the number of homes needed to support job growth forecast by Cambridge Econometrics with the additional jobs arising from the Project rises to 9,000 per annum, as shown in Table 3.3.5.

Table 3.3.5: Summary of dwelling outputs – Scenario 5b: Cambridge Econometrics Forecast (March 2022) with additional jobs from the Project with headship rate adjustment

	Base Year - 2021	Start of construction - 2024	First year of opening - 2029	Interim Assessment Year - 2032
Dwellings	1,077,481	1,125,566	1,180,898	1,213,587
	Design Year - 2038	Long-term Forecast - 2047	2021-47 Change	
			Total	Annual
Dwellings	1,262,303	1,310,179	232,699	8,950

Source: Lichfields analysis using PopGroup

Scenario 6a – Experian Forecast (March 2022)

3.3.9 Experian forecasts the number of jobs in the study area to rise to 1.46m by 2047; an increase of 268,000 compared with 2021.To support this level of job growth the labour supply would need to increase by 293,000, and there would be a need for 309,000 dwellings (11,900 per year) as show in Table 3.3.6.

Table 3.3.6: Summary of outputs – Scenario 6a: Experian Forecast (March 2022)

	Base Year - 2021	Start of construction - 2024	First year of opening - 2029	Interim Assessment Year - 2032
Population	2,457,600	2,565,355	2,653,559	2,703,526
Dwellings	1,072,882	1,124,759	1,179,803	1,211,943
Labour Supply	1,326,030	1,384,842	1,433,158	1,455,454
Jobs	1,191,800	1,245,300	1,289,200	1,309,800
	Design Year - 2038	Long-term Forecast - 2047	2021-47 Change	
			Total	Annual
Population	2,804,368	3,005,804	548,204	21,085
Dwellings	1,275,435	1,382,070	309,188	11,892
Labour Supply	1,504,853	1,618,849	292,819	11,262
Jobs	1,355,200	1,459,678	267,878	10,303

Source: Lichfields analysis using PopGroup

3.3.10 The amount of population growth and housing supply which is needed to support the Experian forecast exceeds all demographic scenarios (based on official projections) assessed in Section 2.0. It should be noted that, as highlighted previously, Experian's underlying assumptions (around unemployment, commuting and economic activity) are dynamic over time in response to changes in the demand for labour in a given area and its surrounding area. This is a different approach to PopGroup, in which these inputs (unemployment, commuting and economic activity) are fixed based on pre-determined inputs, and levels of migration are adjusted to reach a population which would support a given level of job growth.

Scenario 6b – Experian Forecast (March 2022) with headship rate adjustment

3.3.11 With an adjustment for headship rates, the number of homes needed to support the job growth forecast by Experian rises to 13,300 per annum, as shown in Table 3.3.7.

Table 3.3.7: Summary of dwelling outputs – Scenario 6b: Experian Forecast (March 2022) with headship rate adjustment

	Base Year - 2021	Start of construction - 2024	First year of opening - 2029	Interim Assessment Year - 2032
Dwellings	1,077,481	1,139,864	1,212,121	1,248,292
	Design Year - 2038	Long-term Forecast - 2047	2021-47 Change	
			Total	Annual
Dwellings	1,314,266	1,423,013	345,532	13,290

Source: Lichfields analysis using PopGroup

Scenario 7a – Experian Forecast (March 2022), with the Project

3.3.12 To support the 1.46m jobs in 2047 forecast by Experian, an estimated labour supply of 1.62m would be needed (see Table 3.3.8 below). This takes into account unemployment and commuting patterns, which mean the study area is likely to need slightly more growth in workers living locally than jobs.

3.3.13 If 100% additionality is assumed, jobs associated with the Project (8,964 by 2047) would imply the labour supply needs to increase by 9,263*, to 1.63m as shown in Table 3.3.8. For the reasons set out above, this is likely to over-estimate the actual demand for labour associated with the Project, but this is a worst-case scenario from a housing demand perspective.

Table 3.3.8: Labour supply requirements associated with the Experian Forecast, with and without the Project, long-term forecast year (2047)

	Labour supply needed in 2047	Jobs in 2047
Experian Forecast	1,618,849	1,459,678
Experian Forecast with Project	1,628,112	1,468,373
Difference	+9,263*	+8,694

Source: Lichfields based on Experian/Oxera. *Note the labour supply increase needed under Experian forecast differs to that required under the CE forecast because the differences in the current estimate of jobs in each authority imply different labour force ratios [the ratio of employed workers resident in an area to the number of jobs].

3.3.14 To support this level of job growth, an additional 16,745 people would be needed (over and above Scenario 6a, i.e. based on the Experian forecast alone) and an additional 7,344 homes. In total, to 2047, this scenario would require 302,000 homes (11,600 per year), as shown in Table 3.3.9.

Table 3.3.9: Summary of outputs – Scenario 7a: Experian Forecast (March 2022), with the Project

	Base Year - 2021	Start of construction - 2024	First year of opening - 2029	Interim Assessment Year - 2032
Population	2,457,600	2,565,355	2,658,571	2,719,528
Dwellings	1,072,882	1,124,759	1,181,648	1,218,123
Labour Supply	1,326,030	1,384,842	1,436,404	1,465,587
Jobs	1,191,800	1,245,300	1,292,230	1,319,271
	Design Year - 2038	Long-term Forecast - 2047	2021-47 Change	
			Total	Annual
Population	2,821,468	3,022,549	564,949	21,729
Dwellings	1,282,563	1,389,413	316,531	12,174
Labour Supply	1,514,765	1,628,112	302,081	11,619
Jobs	1,364,486	1,468,373	276,573	10,637

Source: Lichfields analysis using PopGroup

3.3.15 Whilst this level of population growth and housing growth also exceeds any of the demographic scenarios in Section 2.0, once again this scenario illustrates that the addition of the Project is not determinative. The position remains that employment growth would not be supported under any demographic scenario, whether the Project is included or excluded. However, in any event, a comparison between future housing supply scenarios (as opposed to official demographic projections) and employment scenarios is considered to be more appropriate.

Scenario 7b – Experian Forecast (March 2022) with the Project with headship rate adjustment

3.3.16 With an adjustment for headship rates, the number of homes needed to support job growth forecast by Experian and the additional jobs associated with the Project rises to 13,600 per annum, as shown in Table 3.3.10.

Table 3.3.10: Summary of dwelling outputs – Scenario 7b: Experian Forecast (March 2022) with headship rate adjustment

	Base Year - 2021	Start of construction - 2024	First year of opening - 2029	Interim Assessment Year - 2032
Dwellings	1,077,481	1,139,864	1,214,088	1,254,879
	Design Year - 2038	Long-term Forecast - 2047	2021-47 Change	
			Total	Annual
Dwellings	1,321,704	1,430,559	353,078	13,580

Source: Lichfields analysis using PopGroup

3.4 Summary

3.4.1 A summary of the key outputs for the study area are shown in Table 3.4.1 and Diagram 3.4.1. Under the forecast of job growth set out by Cambridge Econometrics, the study area would see an increase of 119,000 jobs in total to 2047, which would require labour force growth of 134,000 and between 194,000 and 225,000 dwellings. The impact assessment prepared by Oxera expects the Project to generate 12,752 additional jobs (direct, indirect, induced and catalytic, compared with a 'no Project' baseline) at its peak in 2038 in the study area, falling to 11,536 in the long-term forecast year 2047. This would require labour force growth of 146,000 and a need for between 204,000 and 235,000 dwellings.

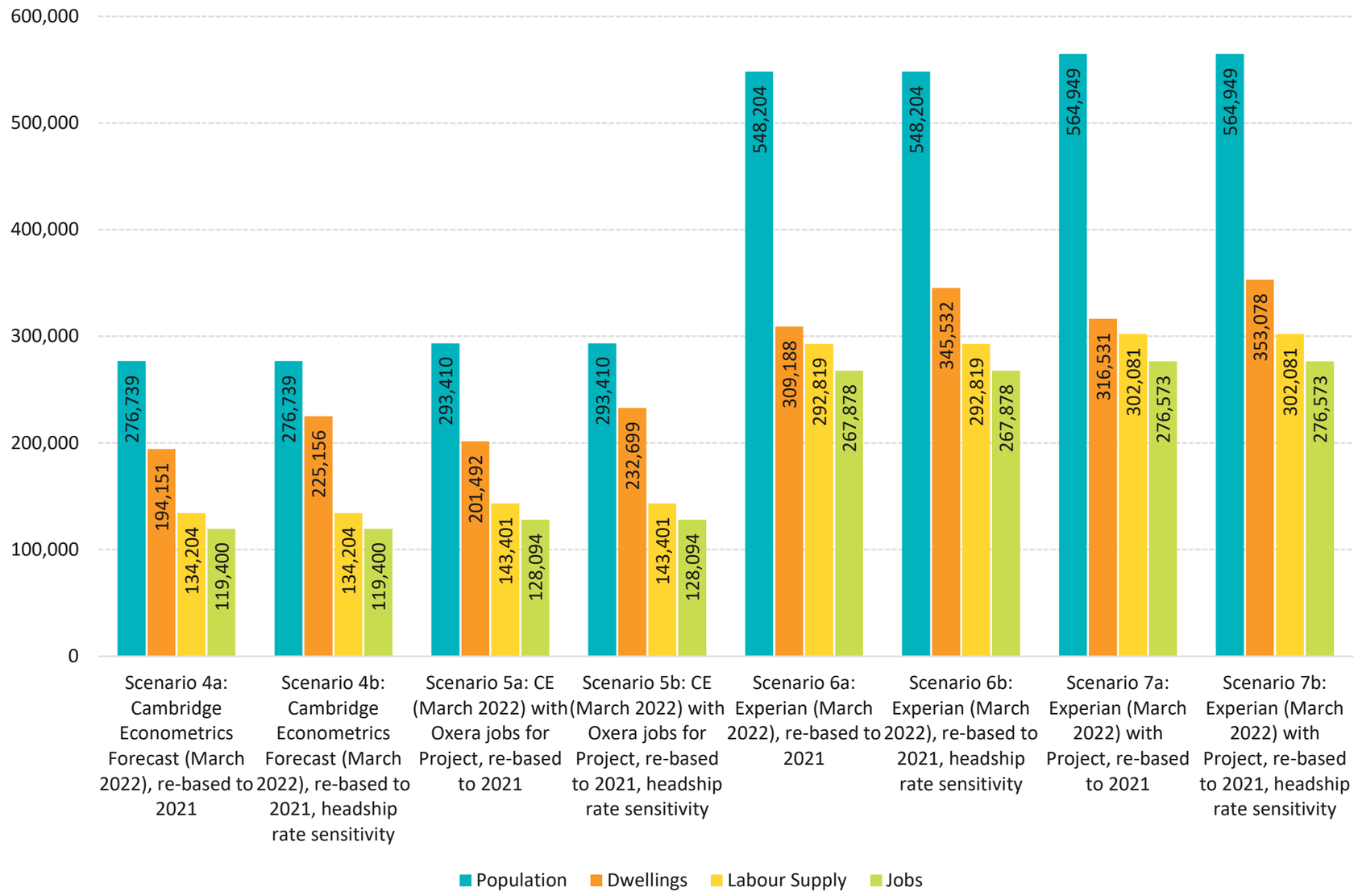
3.4.2 Growth forecast by Experian is substantially higher than CE, with forecast job growth of 268,000 over the period to 2047, requiring labour force growth of 293,000 and between 309,000 and 346,000 dwellings. Job growth would be 279,000, requiring labour force growth of 305,000 and between 319,000 and 355,000 dwellings.

Table 3.4.1: Summary of employment-led scenarios – total change across study area – 2021-47

	Scenario 4a	Scenario 4b	Scenario 5a	Scenario 5b
Population	276,739	276,739	293,410	293,410
Dwellings	194,151	225,156	201,492	232,699
Labour Supply	134,204	134,204	143,401	143,401
Jobs	119,400	119,400	128,094	128,094
	Scenario 6a	Scenario 6b	Scenario 7a	Scenario 7b
Population	548,204	548,204	564,949	564,949
Dwellings	309,188	345,532	316,531	353,078
Labour Supply	292,819	292,819	302,081	302,081
Jobs	267,878	267,878	276,573	276,573

Source: Lichfields analysis using PopGroup

Diagram 3.4.1: Summary of Economic-led scenarios – total change across study area – 2021-47



Source: Lichfields

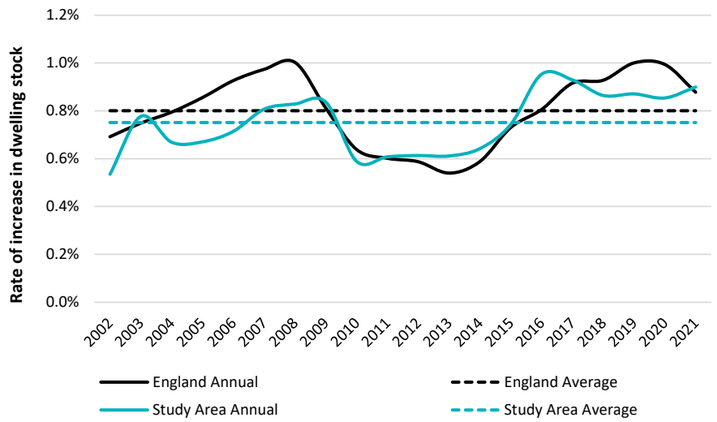
4 Housing-led scenarios

4.1.1 This section assesses the amount of population growth and labour supply that is likely to be generated based on the amount of housing growth which might be expected in the study area to 2047.

4.2 Context

4.2.1 In 2021, there were an estimated 1.09m homes in the study area. Over the last 20 years the number of homes in the study area has increased at a slightly slower rate on average (0.75% per year) compared to England (0.80% per year), albeit has followed national trends as shown in Diagram 4.2.1.

Diagram 4.2.1: Annual change in dwelling stock – England and Study area



Source: MHCLG Live Table 125/122.

4.2.2 The year 2020/21 saw 9,679 net completions[16] in the study area, which is a slight decrease compared to the post-recession peak of 9,807 in 2015/16[17], as shown in Table 4.2.1. However, this is still a substantial increase on housing completions seen in the aftermath of the recession, with around 6,000 completions per year between 2009/10 and 2012/13.

Table 4.2.1: Annual net completions in the study area

	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
Units	6,147	6,166	6,514	7,587	9,807	9,656	9,063	9,210	9,109	9,679

Source: MHCLG Live Table 122. Figures may differ to those set out in AMRs.

4.2.3 Table 4.2.2 shows average net completions in the study area over various periods over the last 20 years. The study area has sustained delivery of over 9,000 homes per year for the last 7 years, with a rate of close to or above 8,000 homes per year being sustained for the last 15 years.

Table 4.2.2: Average net completions in the study area

	Annual average
3 years (2018/19 to 2020/21)	9,333
5 years (2016/17 to 2020/21)	9,343
7 years (2014/15 to 2020/21)	9,159
10 years (2011/12 to 2020/21)	8,294
15 years (2006/07 to 2020/21)	7,928
20 years (2001/02 to 2020/21)	7,540

Source: Lichfields analysis of MHCLG Live Table 122.

4.2.4 Rates of housebuilding in the study area have exceeded current plan requirements historically (which is to be expected, given housing requirements are often expressed as a minimum and authorities are required to maintain a five-year land supply against need[18] where their housing requirement is out-of-date).

4.2.5 Current plan requirements in the study area total 8,368 per year[19] although this is unlikely to reflect the true scale of need in the area. Four Local Plans in Surrey alone are more than 10 years old, meaning they pre-date the introduction of the NPPF in 2012 and their housing requirements are based on the now-revoked Regional Strategies. These are:

- Elmbridge – plan adopted July 2011 with a requirement of 225 dwellings per year;
- Epsom and Ewell – plan adopted July 2007 with a requirement of 181 per year;
- Mole Valley – plan adopted October 2011 with a requirement of 188 per year; and
- Tandridge – plan adopted October 2008 with a requirement of 125 per year.

4.2.6 In the case of all of these authorities, the 'true' housing need is significantly higher than the current plan requirements adopted under Regional Strategies. However, these authorities have not adopted a local plan under the 2012 NPPF which reflects need, nor has there been any successful redistribution of the unmet need to neighbouring authorities[20]. Because these authorities are almost entirely constrained by the Metropolitan Green Belt there is limited scope for significant scale housing to come forward outside sites allocated in the local plan to meet need; should these authorities have prepared plans under the NPPF they would have likely released additional land for housing development in the Green Belt to meet needs and / or redistributed some of their need to neighbouring authorities, increasing housing requirements elsewhere.

4.2.7 In addition, unmet housing need has been a persistent issue within the Greater Brighton and Coastal West Sussex (GBCWS) Housing Market Area. The GBCWS Strategic Planning Board has not produced a Joint Statement since 2016, meanwhile a number of local plans have been adopted which do not meet housing need (notably Brighton and Hove). Yet, there has been no meaningful progress to addressing unmet need[21], notably that arising in Brighton and Hove and other highly constrained coastal areas.

4.2.8 Historic delivery in the study area should therefore be viewed in the context of adopted plans which are currently in place, which in some circumstances (including Green Belt authorities) may pre-date the NPPF or be adopted post-NPPF but still may not be reflective of true 'need'. In many parts of the study area unmet housing need has gone unaddressed. Historic delivery should therefore not be considered as an indication of the upper limit of

[16] Based on DLUHC Live Table 122

[17] DLUHC may revise historic data in each publication of annual housebuilding statistics, hence this figure differs slightly to previous report.

[18] 'Need' being objectively assessed housing need as required under the 2012 version of the National Planning Policy Framework or the more recent standard method for assessing local housing need, introduced under the 2019 version of the National Planning Policy Framework.

[19] Based on the Croydon Local Plan 2018; if the London Plan (2021) housing requirement for Crawley is applied instead the study area total rises to 8,798 (Croydon's requirement rising from 1,649 homes per year in its Local Plan 2018 to 2,079 in the London Plan).

[20] Which would be the case in an authority which is not subject to the constraints set out at Footnote 7, due to the need for authorities to maintain a five-year housing land supply against housing need where their local plan requirement is out-of-date.

[21] The North West Sussex HMA has been successful in redistributing its unmet need, with Crawley's unmet need being split between Horsham and Mid Sussex.

housing delivery in the study area, given that if plan-making in the study area operated in line with national guidance it would be reasonably expected that more homes would have been planned for and delivered[22].

4.3 Future growth

4.3.1 In reality, it is impossible to know the future planning landscape for certain or to specify which local authorities will update their plans, when, and for how much housing they will plan. However, it is possible to assess what might be considered the 'best' case and 'worst' case scenarios in terms of plan-making and housing growth, being fairly confident that the true picture would lie somewhere within this range. Because all scenarios are based to the 2021 Census population, housing trajectories apply from 2021/22 onwards.

'Worst' case scenario

4.3.2 The 'worst' case scenario is based on the most recent housing trajectories for local authorities in the study area, which are primarily based on current plans[23]. Plan coverage in the study area varies; some authorities have up-to-date plans adopted in the last five years whilst others have not adopted a plan since the 2012 NPPF was published.

4.3.3 Whilst many authorities in the study area have trajectories covering the period to 2031, few have trajectories beyond this (and some only have a five-year land supply position statement). To estimate the amount of housing likely to come forward in authorities after the existing trajectory ends, the annual average delivery expected in the trajectory period is trended. For this reason, outputs for the post-2031 period should be treated with some caution, particularly because some authorities which are 'capacity-constrained' (e.g. Brighton and Hove, and Crawley) might see supply reduce over time as housing land becomes scarcer. However, by this time, many (if not all) local authorities should be preparing or reviewing plans in the context of the Government's standard method for estimating local housing need which would result in:

- The overall assessment of need increasing; and
- Under the provisions of the NPPF 2021, a requirement to address any unmet need in neighbouring authorities, which should mean that unmet needs are picked up elsewhere through higher levels of housing provision in those plans.

4.3.4 Crawley is of key importance for the purposes of this analysis; self-evidently it is the location of Gatwick and houses a high proportion of its workers. It is also constrained in terms of housing land supply by virtue of an administrative boundary drawn tightly around much of its urban area. Its current Local Plan (2015-30) housing requirement is capacity constrained, with the borough offloading some of its housing needs to Horsham and Mid Sussex.

4.3.5 In the future it is questionable whether the supply of new housing can continue at current rates; indeed, the current Local Plan expects higher housing growth in the immediate future, with supply tailing off over time. Crawley's latest (at the time of preparing this report) Annual Monitoring Report (published August 2021) includes a housing trajectory which covers the period to 2037, and includes sites which are part of the current Local Plan as well as proposed allocations in the emerging Local Plan Review. The Local Plan Review proposes (Policy H1) a stepped housing requirement, with a requirement of 350 dwellings per annum (dpa) in Years 1-5 (2021-26), a higher requirement of 450 dpa in Years 6-10 (2026-31) and a lower requirement of 220 dpa in Years 11-16 (2031-37), although the actual housing supply in the trajectory varies from this requirement, with supply peaking in 2026/27 at 953 dwellings and tailing off in the later years at 55 dwellings per year.

4.3.6 Taking a pragmatic approach, for the purposes of this assessment, it is assumed that post-2037 (the end date of Crawley's current trajectory) Crawley would deliver housing at 220 per annum, which is the average annual housing requirement set out in Policy H1 for the final six years (Years 11-16, 2031-37) of the emerging Local Plan Review period[24]. This is lower than the average based on its current trajectory[25] but reflects the constrained and under bounded nature of the borough.

4.3.7 The South Downs National Park Authority (SDNPA) is also a planning authority of relevance, and is responsible for plan-making and housing delivery in parts of Lewes, Chichester, Horsham, Wealden and Arun. Housing falling within the SDNPA areas of these districts have been added to the trajectories of those districts for the purposes of this assessment.

Water and Nutrient Neutrality

4.3.8 In September 2021 Natural England issued a Position Statement stating that water abstraction for drinking water supplies is having a negative impact on the wildlife sites in the Arun Valley. This affects authorities within the Sussex North Water Resource Zone, which covers all of Horsham, almost all of Crawley, large areas of Chichester and a small part of Arun (i.e. authorities within the study area). It also overlaps with areas within the SDNPA, and hence has the potential to impact on housing delivery in the study area. Natural England has advised that any new development that takes place in this catchment must not add to this negative impact. The requirement to demonstrate water neutrality does not apply retrospectively to development which already had planning permission at the time the Position Statement was published but has the potential to affect developments which post-date it.

4.3.9 In addition, the Solent area is one of a number of areas nationally affected by Natural England guidance which requires that new residential development must achieve nutrient neutrality. The issue of nutrient neutrality dates back to 2019 and therefore mitigation measures (such as on-site mitigation, working with local authorities on off-site measures and nutrient trading schemes) are becoming well established. The nutrient neutrality catchment for the Solent covers parts of Chichester (including areas within and outside the SDNPA) and hence has the potential to impact on housing delivery in the study area.

4.3.10 During consultation on the Project undertaken in late 2021, some local authorities within the study area expressed concern that water and nitrate neutrality may impact upon the quantum of housing delivery, due to fewer / no planning permissions being granted until a mitigation strategy is in place (or unless developments can demonstrate no water impact). Therefore, further work was undertaken by Lichfields to analyse whether water and nutrient neutrality could impact on housing trajectories to the degree that they affected the conclusions of this report.

[22] Meaning plans made provision for their housing need in full, or redistributed this to neighbouring areas where needs could not be met, and where plans were reviewed every five years and kept up-to-date in accordance with the relevant NPPF.

[23] Housing trajectories in plans which are currently undergoing examination or are in draft plans which have yet to be submitted have not been included on the basis that these might be subject to change prior to adoption, with the exception of Crawley.

[24] See Strategic Policy H1 Housing Provision of the Draft Crawley Borough Local Plan 2021-2037 (Submission publication version January 2021).

[25] Trending the annual average in Crawley's current trajectory from 2020/21 [completions] to 2029/30 would give a figure of 497 dwellings per annum.

4.3.11 A review of the housing trajectories and associated monitoring reports/evidence bases for the authorities potentially affected by water and nutrient neutrality was conducted. This review showed the following:

- **Horsham's** latest housing trajectory was published as part of its Annual Monitoring Report 2020/21 which was published in December 2021, and therefore post-dates the Position Statement on water neutrality published in September 2021 by Natural England. The AMR states that its housing trajectory is based on the position of development being able to demonstrate "water neutrality". Therefore, any impact of water neutrality on housing supply in Horsham is reflected in its latest housing trajectory which is used as the basis for Scenario 8a 'Current Housing Trajectories' below;
- **Crawley's** latest housing trajectory is contained within the AMR published in August 2021 and therefore pre-dates the Position Statement. However, Crawley Council (and surrounding Councils) has been alive to the issue of water neutrality for some years, with Crawley Council (in collaboration with Horsham District Council, Mid Sussex District Council and Reigate & Banstead Borough Council) commissioning a Water Cycle Study (published in August 2020), subsequent Addendum (January 2021) and Parts A and B of a three-part study on Water Neutrality (published in July 2021 and April 2022 respectively). The purpose of these documents is to understand the context for water supply in the area and identify measures that may offset demand (taking into account planned growth), with Part C (ongoing) identifying the mitigation measures which are considered feasible and containing a draft plan for implementing and funding these measures.
  Importantly, Part A of the three-part study, published in July 2021 states that *"Natural England has advised the Crawley Borough, Chichester District and Horsham District Councils that development in the Sussex North part of the Gatwick sub-region must not add to this [water neutrality] adverse effect"*, meaning that Crawley Council would have been aware of the potential impact of water neutrality on developments (and therefore its housing trajectory) prior to the publication of its latest housing trajectory (in August 2021) and Natural England's Position Statement (in September 2021). Any impacts the Council considered water neutrality to have (if any) on its housing trajectory would therefore, be expected to be reflected in the latest housing trajectory.
  In any event, even if there were to be a temporary reduction in the housing trajectory in Crawley in the short term due to the need for schemes to demonstrate water neutrality (which might not be reflected in Crawley's latest housing trajectory), it is not anticipated that this would materially affect the conclusions of this report. Any potential impact that employment associated with the Project may have on housing demand would not be expected to occur until at least the start of construction, which is 2024, with peak operational employment occurring in 2038. Given Crawley Council (and its neighbouring authorities) has been aware of the issue of water neutrality for some years and has made significant progress on an evidence base which seeks to find a solution to water supply issues in the sub-region, it is reasonable to assume that a solution will be found for long-term water supply in the region which will release any pent-up permissions which might be being held up in the immediate future due to water neutrality. It is also possible that other interim measures, such as credit systems (e.g. where Councils or housing providers retrofit existing stock to enable offsetting of new developments through the sale of credits) will provide a solution to allow permissions to be granted in the shorter term and maintain housing supply;
- Within **Chichester** the majority of the area covered by the Sussex North Water Resource Zone in Chichester is within the SNDPA. The latest housing trajectory published by the SDNPA is within in its Annual Monitoring Report 2020/21, published December 2021, which acknowledges the water neutrality issue in Sussex (as well as the nutrient neutrality issue in the Solent region, which affects areas of Chichester falling within the SNDPA), noting that the SDNPA is working with other affected authorities on a strategic solution to water neutrality. Given this acknowledgement and that the housing trajectory post-dates the Position Statement, it would be reasonable to assume that if the SDNPA considered that water or nutrient neutrality had any impact on anticipated housing delivery, this would be reflected in the SDNPA's latest housing trajectory.
  For the parts of Chichester falling outside the SNDPA[26], the latest housing trajectory is set out within Chichester Council's latest five-year land supply assessment which has a base date of 1st April 2021 and is referred to in the 2020/21 Annual Monitoring Report which was published in March 2022. It's AMR refers to nutrient neutrality but not water neutrality; it is unclear whether the trajectory post-dates the Natural England Position Statement on water neutrality of September 2021. However, for the reasons described above is it not considered that any temporary reduction in the housing trajectory would materially affect the conclusions of this report. In any event, this area of Chichester contains few housing allocations; and
- The small area of **Arun** which falls within the Sussex North Water Resource Zone is part of the South Downs National Park and therefore any impact of water neutrality on the housing trajectory would be expected to be accounted for, for the reasons described above.

4.3.12 During the consultation process no authority provided any alternative housing trajectory (to their latest published trajectory) for use within this analysis/report.

4.3.13 For this 'worst case' scenario, it would be expected that overall housing delivery in the study area would increase to a peak of c.13,000 homes in 2022/23 and 2023/24, before falling to around 9-11,000 in the medium to long-term as shown in Diagram 4.3.1. Total delivery over the 26-year period 2021-47 would be expected to be 272,000 dwellings, or 10,500 per year on average.

4.3.14 This 'worst-case' scenario is assessed is in the context that, as shown in Table 4.2.2 above, average levels of housebuilding in the study area over the last seven years have exceeded 9,000 homes per year (and this is with a number of authorities having pre-2012-NPPF plans in place, as noted above). Therefore, current housing trajectories are not substantially higher than recent trends when looking over the longer term, and it is not considered necessary to model a different scenario which trends forward past trends in housing delivery. In any event, trajectories represent authority's own up-to-date and evidence-based assessments of how much housing they consider will come forward in their area (and in many cases this will have been recently examined by a Local Plan Inspector), therefore there is

[26] Within Chichester, the area of Chichester District to the north of the South Downs National Park is affected by water neutrality and the area to the south of the South Downs National Park (i.e. in/around the town of Chichester) is affected by nutrient neutrality. Outside the National Park, no area is affected by both.

no reason to question whether the published housing trajectories potentially over-state anticipated housing delivery simply because they may slightly exceed longer-term (10+ years) historic trends in delivery.

'Best' case scenario

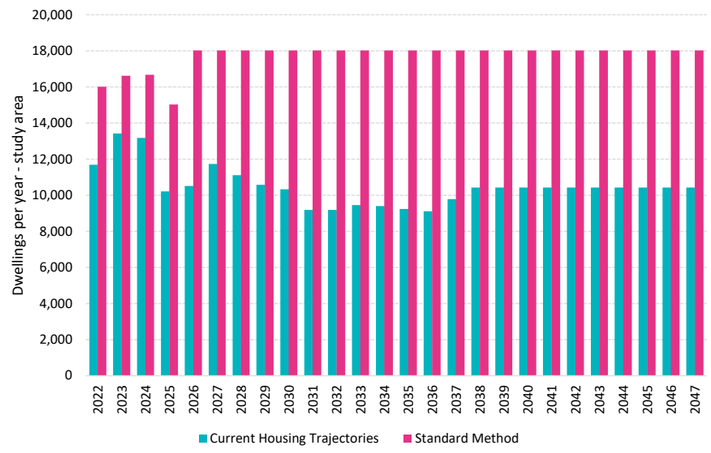
4.3.15 The NPPF (DLUHC, 2021) sets out that in local authorities where strategic policies are more than five years old (and have not been reviewed and found not to need updating) the standard method should be used for the basis of calculating five-year land supply[27]. This is likely to have the effect of increasing short term delivery in some areas (e.g. those which are unconstrained[28]) although would have less of an impact in Green Belt / more highly constrained authorities (which might reasonably conclude that paragraph 11b of the NPPF justifies them not having to meet local housing need as calculated based on the standard method).

4.3.16 Over time authorities will update their plans to account for the standard method, resulting either in an increase in delivery in their area or (where this is not possible, e.g. due to constraints) this need being addressed in neighbouring authorities (as required by paras 26 and 35c of the NPPF). As the standard method is gradually rolled out through the planning system it would – for the study area overall – result in increased housing targets overall as it exceeds the current plan requirements across every authority in the study area. At the time of writing this report the standard method remains in place as the basis by which authorities should assess their five-year land supply (where applicable) and prepare local plans, and therefore this assessment has been conducted using the standard method.

4.3.17 In a 'perfect' system, authorities would have updated their local plan and be able to maintain a five-year land supply against the standard method as soon as their current plan becomes more than five years old[29]. This would be the best-case scenario, although it is unlikely to happen precisely like this because it would require substantial increases in housing delivery to occur very quickly.

4.3.18 Under this 'best-case' standard method scenario, it is expected that housing delivery would increase to around 16,000 per year in the short to medium term and be sustained at around 18,000 per year in the long term, as shown in Diagram 4.3.1[30]. This is evidently significantly higher than current delivery – near double the amount of homes delivered in the 2020/21 – albeit given Government objectives to boost housing supply and the area's context (including relatively unaffordable parts of the wider South East) this is to be expected. In total over 26 years it is expected that 461,000 dwellings would be delivered across the study area under this scenario.

Diagram 4.3.1: Dwellings per annum across study area - Current trajectories and Standard Method



Source: Lichfields analysis.

4.4 Outputs

Scenario 8a: Current housing trajectories

4.4.1 The delivery of 272,000 homes across the study area over the 2021 to 2047 period could support population growth of 456,000 and labour supply growth of 238,000, in turn supporting 206,000 jobs.

4.4.2 This suggests that the overall amount of population growth (and labour supply growth) current housing trajectories would be expected to support in the study area is greater than the labour supply which would be needed to support the March 2022 Cambridge Econometrics forecasts of 119,400 increased jobs, or 130,936 with the Project.

4.4.3 The amount of labour supply growth under Scenario 8a would not be sufficient to support the Experian scenario, with or without the Project (with forecast growth of 267,878 and 279,415 jobs respectively over the study area to 2047). Importantly however, and as previously noted, the inclusion of the Project is not the determining factor as to whether the study area as a whole can or cannot support forecast job growth by Experian, based on current housing trajectories. Current housing trajectories would not, on the basis of this analysis, support job growth forecast by Experian, whether the Project jobs are additional to the Experian forecast or not.

4.4.4 Furthermore, Section 3.0 (Table 3.2.5) showed that the level of economic growth planned for in current local plans in aggregate is substantially lower than the Experian March 2022 forecast (and is more in line with the Cambridge Econometrics Forecast), despite the fact that many of these plans refer to Experian in their evidence base. This is because the Experian forecasts referred to in the evidence base are typically older, and some were even prepared in the aftermath of the 2008 recession when economic forecasts were, generally, lower than they are today, but also because some authorities' evidence refers to other sources as well. Even emerging plans (which refer to a mixture of sources for employment forecasts), which when included result in a higher level of aggregate job growth across the study area, do not appear to be show a level of job growth as high as forecast by Experian; however if they were, we would expect those emerging plans to have a commensurately higher level of housing provision to ensure the plan is internally consistent - a higher trajectory which might not be reflected in their latest trajectory. This is

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27 Paragraph 74, unless these policies have been reviewed and have been found not to require updating.

28 Where the increase in housing requirement as a result of the standard method results in less than a five-year land supply, or results in an authority failing the housing delivery test, the presumption in favour of sustainable development would be triggered.

29 To obtain a view of the true 'best case' scenario in terms of the standard method, no standard method figure has been capped based on the current adopted requirement (which would be the case if an authority updated its housing requirement while its current requirement was less than five years old). The cap is always taken to be 40% above whichever is higher of the current requirement or household projections at that point in the future (which would be the case if the current requirement was more than 5 years old). The assessment also incorporates the 35% cities and urban centres uplift (see PPG ID: 2a-004-20201216) which applies to Brighton and Hove and Croydon.

30 This increase in 2025/26 is primary driven by Croydon, as the London Plan (adopted in March 2021, which sets the Borough's current housing requirement at 2,079 per year) will become more than five years old at this point. The standard method figure for Croydon is currently 3,929 – substantially higher than the London Plan and would – under current national policy – apply for the purposes of five-year land supply and future plan-making.

particularly important in the study area where the four authorities without post-2012 NPPF plans (and therefore for which this assessment relies on emerging employment evidence) are entirely green belt constrained (Elmbridge, Epsom and Ewell, Mole Valley and Tandridge), meaning their current housing trajectories (which this assessment adopts for the purposes of Scenario 8a) are in no way linked to the level of employment growth forecasts which are set out in their emerging evidence. Only when plans are adopted in those areas to allow the release of Green Belt land, will the amount of housing be commensurate to the level of job growth. Were Scenario 8a to be re-run when these four authorities had up-to-date adopted local plans it would likely add a substantial amount of housing supply (and therefore labour supply) to the overall available in the study area.

4.4.5 Further detailed labour supply analysis, comparing labour supply based on current trajectories with labour demand from different employment scenarios, including a local authority breakdown, is set out in Section 5.0.

Table 4.4.1: Summary of outputs - Scenario 8a: Current housing trajectories

	Base Year - 2021	Start of construction - 2024	First year of opening - 2029	Interim Assessment Year - 2032
Population	2,457,600	2,531,225	2,617,132	2,657,637
Dwellings	1,072,882	1,111,166	1,165,311	1,194,011
Labour Supply	1,326,030	1,363,430	1,412,181	1,428,827
Jobs	1,197,900	1,230,511	1,275,366	1,289,066
	Design Year - 2038	Long-term Forecast - 2047	2021-47 Change	
			Total	Annual
Population	2,744,490	2,915,500	457,900	17,612
Dwellings	1,251,417	1,345,221	272,338	10,475
Labour Supply	1,469,430	1,564,224	238,194	9,161
Jobs	1,321,971	1,403,583	205,683	7,911

Source: Lichfields analysis using PopGroup

Scenario 8b: Current housing trajectories, with headship rate adjustment

4.4.6 If there were to be some improvement in household formation amongst younger people, the amount of housing which can be expected based on current trajectories in the study area would support a slightly smaller population overall, and therefore a smaller labour supply (and thus fewer jobs). The delivery of 272,000 homes under this scenario could be expected to yield population growth of 386,000 across the study area, yielding 198,000 in additional labour supply, supporting 170,000 jobs (as shown in Table 4.4.2). Whilst this is lower than under Scenario 6a, it is still greater than the job growth forecast in the Cambridge Econometrics forecasts, and lower than labour demand based on Experian. As with Scenario 8a, the inclusion of the Project jobs is not the determinative factor.

Table 4.4.2: Summary of outputs - Scenario 8b: Current housing trajectories with headship rate adjustment

	Base Year - 2021	Start of construction - 2024	First year of opening - 2029	Interim Assessment Year - 2032
Population	2,457,600	2,505,329	2,553,177	2,587,279
Dwellings	1,077,481	1,115,765	1,169,910	1,198,610
Labour Supply	1,326,030	1,347,005	1,373,131	1,387,282
Jobs	1,197,900	1,215,937	1,240,340	1,251,802
	Design Year - 2038	Long-term Forecast - 2047	2021-47 Change	
			Total	Annual
Population	2,671,943	2,843,807	386,207	14,854
Dwellings	1,256,016	1,349,819	272,338	10,475
Labour Supply	1,428,499	1,524,266	198,236	7,624
Jobs	1,285,400	1,367,931	170,031	6,540

Source: Lichfields analysis using PopGroup.

Scenario 9a: Standard method (best case scenario)

4.4.7 As set out above, if the standard method were implemented 'perfectly' it is expected around 461,000 homes would be delivered in the study area over the next 26 years to 2047. In reality, it is unlikely that this would actually be delivered, but it represents a best-case scenario for housing delivery, indicative of the maximum amount of housing that is likely to be delivered in the future in the study area.

4.4.8 As shown in Table 4.4.3 under this scenario there would be estimated population growth of 903,000 and labour supply growth of 494,000, in turn supporting an estimated 438,000 jobs. This is clearly substantially more jobs than either the Cambridge Econometrics or Experian forecasts, including after additional jobs associated with the Project are factored in. As per previous scenarios, the inclusion of the Project is not a determinative factor.

Table 4.4.3: Summary of outputs - Scenario 9a: Standard Method (best case scenario)

	Base Year - 2021	Start of construction - 2024	First year of opening - 2029	Interim Assessment Year - 2032
Population	2,457,600	2,559,318	2,729,482	2,832,856
Dwellings	1,072,882	1,122,186	1,209,326	1,263,409
Labour Supply	1,326,030	1,381,496	1,481,843	1,535,609
Jobs	1,197,900	1,248,848	1,338,500	1,385,685
	Design Year - 2038	Long-term Forecast - 2047	2021-47 Change	
			Total	Annual
Population	3,038,346	3,360,848	903,248	34,740
Dwellings	1,371,576	1,533,827	460,945	17,729
Labour Supply	1,643,166	1,820,120	494,089	19,003
Jobs	1,479,974	1,635,592	437,692	16,834

Source: Lichfields analysis using PopGroup

Scenario 9b: Standard method (best case scenario), with headship rate adjustment

4.4.9 As set previously set out, if improvement to headship rates materialise, a given level of housing would support a smaller population (and therefore labour supply and jobs) than would otherwise be the case. Under the amount of housing which could come forward in the study area under the standard method scenario (461,000 by 2047) population growth of 810,000 would be expected, yielding labour force growth of 442,000 and supporting 391,000 jobs, as shown in Table 4.4.4. Again, this is clearly substantially more jobs than either the Cambridge Econometrics or Experian forecasts, including after additional jobs associated with the Project are factored in. As per previous scenarios, the inclusion of the Project is not a determinative factor.

Table 4.4.4: Summary of outputs - Scenario 9b: Standard Method (best case scenario), with headship rate adjustment

	Base Year - 2021	Start of construction - 2024	First year of opening - 2029	Interim Assessment Year - 2032
Population	2,457,600	2,532,602	2,658,260	2,750,817
Dwellings	1,077,481	1,126,785	1,213,924	1,268,008
Labour Supply	1,326,030	1,364,527	1,438,129	1,486,751
Jobs	1,197,900	1,233,710	1,299,401	1,342,017
	Design Year - 2038	Long-term Forecast - 2047	2021-47 Change	
			Total	Annual
Population	2,948,555	3,267,985	810,385	31,169
Dwellings	1,376,175	1,538,426	460,945	17,729
Labour Supply	1,591,978	1,767,995	441,964	16,999
Jobs	1,434,352	1,589,278	391,378	15,053

Source: Lichfields analysis using PopGroup. The overall change in dwellings is the same between Scenario 9a and 9b, however the number of dwellings in the start year (and therefore subsequent years) is different because each scenario uses different headship rates.

4.5 Summary

4.5.1 This section has considered the amount of housing likely to come forward based on current trajectories alone (not taking into account emerging or new plans which might increase delivery or possible increases resulting in a lack of five-year land supply against the standard method) and the amount of housing that would come forward if the standard method for calculating local housing need were implemented 'perfectly'. On this basis it can be concluded that the amount of housing likely to be delivered in the study area over the next 26 years would be somewhere between 272,000 and 461,000 homes.

4.5.2 The analysis suggests that the lower of these scenarios would be sufficient to support job growth forecast by Cambridge Econometrics, with or without the Project, with a surplus in labour supply across the study area as a whole. Further analysis of the labour supply, including a local authority breakdown, is given in Section 5.0 of this report.

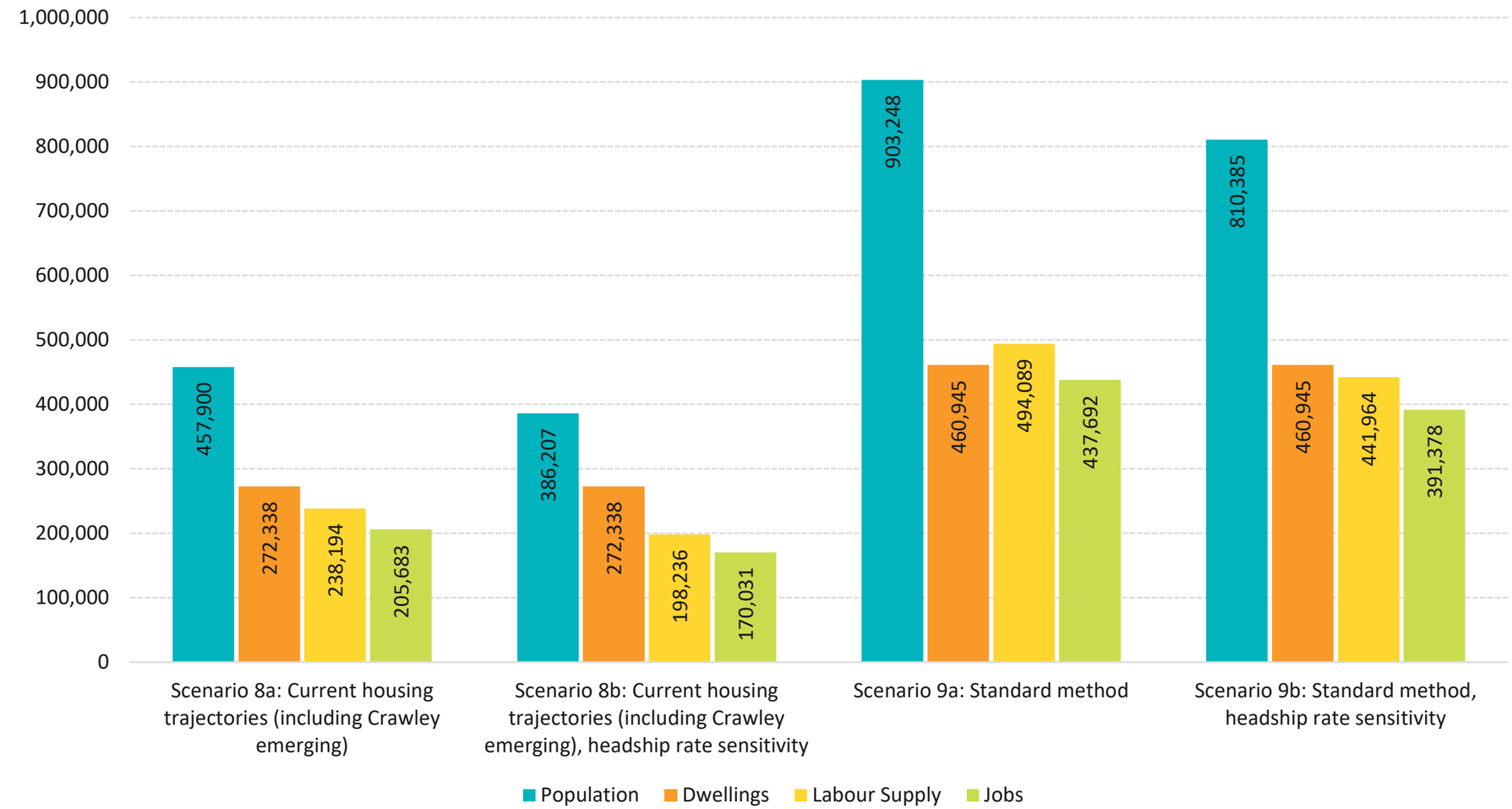
4.5.3 The lower end of this range would not be sufficient however to support the latest Experian forecast, but the Project is not the determinative factor. In any event, this outcome is to be expected given that the Experian March 2022 forecast expects higher growth in the study area as a whole compared with the level of job growth which underpins currently adopted and emerging plans in the study area. As local plans will broadly align their housing and employment strategies, it is therefore not surprising that the level of housing growth in current trajectories does not support the latest Experian forecast. However, the employment growth forecast by Experian would be supported (with or without the Project, and with a comfortable surplus) based on housing delivery at the top end of this range, i.e. in line with the standard method. As plans in the study area are updated and reviewed (and as the four Green Belt authorities with pre-NPPF plans adopted a new plans) we would expect the level of housing to be delivered to become closer to – if not reach – this level of housing delivery.

Table 4.5.1: Summary of outputs - Housing-led scenarios - total change across study area – 2021-47

	Scenario 8a	Scenario 8b	Scenario 9a	Scenario 9a
Population	457,900	386,207	903,248	810,385
Dwellings	272,338	272,338	460,945	460,945
Labour Supply	238,194	198,236	494,089	441,964
Jobs	205,683	170,031	437,692	391,378

Source: Lichfields analysis using PopGroup

Diagram 4.5.1: Summary of Housing-led scenarios - total change across study area – 2021-47



Source: Lichfields analysis using PopGroup

5 Labour supply analysis

5.1.1 The results of the analysis set out in Sections 2.0 – 4.0 show growth in population, housing and jobs in the study area as a whole. This has suggested that labour supply generated by current housing trajectories is likely to be higher than the required number of workers needed to fulfil job growth forecast by Cambridge Econometrics (which broadly aligns with the amount of job growth which underpins local plans in the study area, in the medium term), with or without the Project.

5.1.2 However, it is important to consider whether there are any particular local geographies within the study area, or time periods, that could present potential 'pinch-points', i.e. where there might be a shortage of labour / housing. This is important because whilst Gatwick does draw its workers from a wide catchment area covering multiple housing market areas (HMAs), in reality, the majority of jobs are drawn from local authority areas closest to Gatwick (especially Crawley). HMAs represent the geographic extent to which people would search for new housing taking into account factors such as employment opportunities and house prices. It is also important to consider whether there are any particular time periods in which population / housing / jobs are misaligned, which might impact the timing in which housing and other infrastructure needs to come forward.

5.1.3 Section 4.0 has also shown that whilst current trajectories are anticipated to support the Cambridge Econometrics forecast (with or without the Project) they are not anticipated to yield sufficient labour supply to support the latest Experian forecast. However, this is to be expected given the latest Experian forecasts are, in aggregate, significantly higher than the job forecasts underpinning currently adopted plans in the area. As local plans are revised, their employment evidence might factor in higher forecasts (which might align more closely with the March 2022 Experian forecast) but equally those housing trajectories would also be expected to commensurately increase, at a minimum to align with the standard method (or indeed more, if this was justified on an economic basis). The labour supply generated by current housing trajectories and the labour demand associated with the Experian forecast are therefore not comparable. In any event, the Project is not the determinative factor as to whether current trajectories can or cannot support the Experian forecast). On these bases (i.e. to ensure the analysis is comparing like-with-like), we have considered two comparisons for the 'pinch-point' analysis to assess whether there are any years or authorities / housing market areas where there may be a shortfall of labour / housing:

- Labour demand associated with the Cambridge Econometrics forecast and labour supply arising from current housing trajectories (which has an overall labour surplus of between 95,000 and 104,000, depending on whether the Project is included); and
- Labour demand associated with the Experian forecast and labour supply arising if housing delivery rose in line with the standard method (which has an overall labour surplus of between 192,000 and 201,000).

5.1.4 It should be noted that if the labour demand associated with the Cambridge Econometrics forecast (the lower of the two jobs forecasts) were compared with the labour supply arising from the standard method (the higher of the two housing scenarios), the labour supply position would be significantly better than either of the scenarios presented above (with a surplus of 351,000 even with the Project included).

5.1.5 Detailed outputs underpinning the labour supply analysis in this section can be found at Annex 7. Within Annex 7, results are presented by local authority as well as the Functional Economic Market Area (FEMA) which corresponds with the North West Sussex HMA and the Labour Market Area (LMA) because the FEMA and LMA outputs are used within the accompanying socio-economic chapter.

5.2 'Pinch-point' analysis

Cambridge Econometrics and Current Trajectories

Study area

5.2.1 The labour supply that would be needed to support job growth under the Cambridge Econometric forecasts with and without the additional demand arising from the Project (Scenarios 4a and 5a) have been compared with the labour supply that is expected to be generated based on current housing trajectories (Scenario 8a). Overall, this is likely to be a worst-case scenario comparison because:

- From a labour demand perspective, the assessment of the additional labour demand from the Project is possibly the worst-case scenario (in short, because it assumes all employment associated with the Project is not currently reflected in the forecasts and is net additional to those forecasts). Lower labour demand than suggested by Scenario 5a would yield a lower housing demand; and
- From a housing delivery perspective, Scenario 8a is likely to be the worst-case scenario because the number of homes which would actually be delivered is likely to exceed that based on current trajectories as the standard method begins to inform plan-making and decision-taking (moving towards Scenario 9a). The result of higher housing supply than current trajectories would be a lesser shortfall (or greater surplus) than the analysis below suggests.

5.2.2 Table 5.2.1 summarises the shortfall / surplus in labour supply by local authority in the key monitoring years based on a comparison of Scenarios 4a / 5a and 8a. These local authority-level figures are presented for information purposes as they form the basis of the subsequent HMA analysis, from which we draw our key conclusions. As noted previously in this report, HMAs represent the geographical areas across which people move in search for housing, taking into account house prices, travel-to-work patterns, etc, and HMAs typically cover multiple local authorities. Therefore, for the purposes of assessing potential housing impacts, it is less important to consider impacts on specific local authorities and more important to consider impacts at the HMA level.

5.2.3 Table 5.2.1 shows that under current housing trajectories there would be shortfalls of labour in some authorities in all of the reporting years. This shortfall occurs across 11 of the 17 study area authorities in 2024 (and is the same with or without the Project, since additional operational jobs are not anticipated at this time) at which point the overall labour surplus in the study area is c.1,500.

5.2.4 The shortfall (without the Project) falls to six of the authorities by 2029, when the overall study area labour surplus continues to rise. The inclusion of the Project worsens the degree of shortfall of shortfall in these six authorities, and also 'tips' Lewes from having a labour surplus (of +102) to a shortfall, albeit this shortfall is small at only 3. In 2029, the overall labour surplus across the study area is 26,938 without the Project and 23,717 with the Project.

5.2.5 By 2032, four authorities are anticipated to have a shortfall in labour supply (without the Project). The inclusion of the Project increases the shortfall in these four authorities, and tips a further three authorities (Chichester, Reigate & Banstead and Tandridge) into having a shortfall (in other words, the Project is a determinative factor in these three authorities in 2032, in terms of whether there is a labour surplus or shortfall). In 2032, the overall

labour surplus across the study area is 30,500 without the Project and 20,442 with the Project.

5.2.6 In 2038, without the Project, five authorities are anticipated to have a shortfall in labour; these same authorities would have a greater shortfall with the Project included. In addition, the Project results in Crawley going from having a labour surplus of 124 to having a shortfall of -1,093. In 2038, the overall surplus in the study area is between c.34,000 and c.44,000 (depending on whether the Project is included). Further consideration is given to the position across the Housing Market Areas subsequently in this section.

5.2.7 By 2047 just two authorities are anticipated to have a shortfall in labour (without the Project); when the Project is included these shortfalls are greater in these two authorities, and Crawley's surplus (without the Project) becomes a shortfall, similar to the change seen in 2038. Crawley is therefore the only authority in which the Project is a determinative factor in the long-term forecast year. At this point, the overall surplus in the study area is anticipated to be 95,000 (with the Project).

Table 5.2.1: Summary of surplus/shortfall in labour supply in key years by local authority - Cambridge Econometrics scenario (with/without Project) compared with current housing trajectory scenario

	Without Project (Scenario 4a)				
	2024	**2029**	**2032**	**2038**	**2047**
Adur	-49	1,862	1,308	2,035	3,751
Arun	-345	5,160	7,595	11,760	20,919
B'n & Hove	2,416	6,896	6,192	3,209	5,086
Chichester	-571	572	204	-300	2,966
Crawley	392	3,049	2,229	124	230
Croydon	3,395	-164	-1,649	-1,259	5,320
Eastbourne	-1,655	-1,984	-2,501	-3,333	-3,025
Elmbridge	-301	-81	-640	-899	1,214
Eps. & Ew.	-1,306	-1,626	-1,779	-2,450	-2,611
Horsham	-400	1,755	2,101	4,901	10,984
Lewes	-622	102	134	584	2,736
Mid Sussex	1,806	5,915	8,337	13,148	21,424
Mole Valley	125	1,558	2,048	3,210	5,593
R'te & Ban.	-1,483	-346	114	1,518	4,458
Tandridge	-48	-244	78	645	2,778
Wealden	-195	2,858	4,458	7,566	15,428
Worthing	327	1,655	2,270	3,598	6,739
Total	**1,486**	**26,938**	**30,500**	**44,057**	**103,990**
	With Project (Scenario 5a)				
	2024	**2029**	**2032**	**2038**	**2047**
Adur	-49	1,792	1,089	1,821	3,552
Arun	-345	5,005	7,111	11,292	20,484
B'n & Hove	2,416	6,500	4,964	2,027	3,996
Chichester	-571	498	-23	-520	2,763
Crawley	392	2,668	1,022	-1,093	-933
Croydon	3,395	-584	-2,955	-2,526	4,144
Eastbourne	-1,655	-2,074	-2,780	-3,602	-3,273
Elmbridge	-301	-174	-930	-1,179	954
Eps. & Ew.	-1,306	-1,703	-2,017	-2,681	-2,826
Horsham	-400	1,475	1,225	4,039	10,174
Lewes	-622	-3	-191	269	2,444
Mid Sussex	1,806	5,623	7,423	12,246	20,574
Mole Valley	125	1,465	1,756	2,924	5,326
R'te & Ban.	-1,483	-636	-798	616	3,608
Tandridge	-48	-377	-336	240	2,400
Wealden	-195	2,686	3,922	7,047	14,946
Worthing	327	1,556	1,962	3,298	6,460
Total	**1,486**	**23,717**	**20,442**	**34,217**	**94,793**

Source: Lichfields analysis

5.2.8 The analysis below considers the issue at the HMA level.

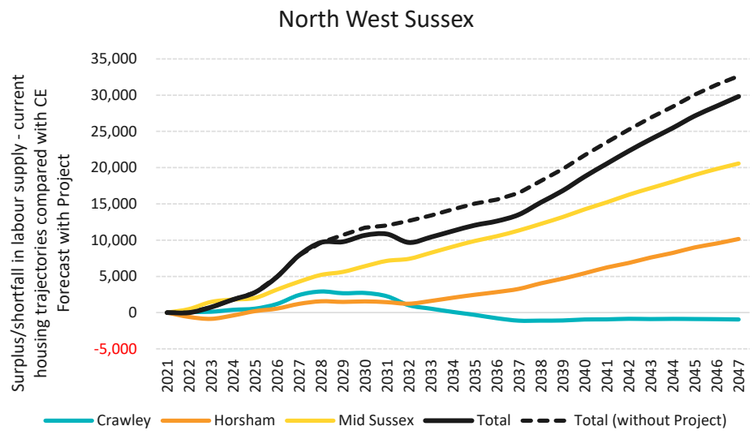
North West Sussex

5.2.9 Whilst Gatwick draws upon labour from a relatively wide catchment area, Crawley itself forms an established HMA with Mid Sussex and Horsham: the 'North West Sussex HMA'. This has been established through the plan-making process in all three authorities, with Mid Sussex and Horsham currently meeting Crawley's unmet housing need. The North West Sussex Functional Economic Market Area (on a best-fit basis to local authority boundaries) also corresponds to these three authorities, and therefore the term 'HMA' can be used interchangeably with 'FEMA' for North West Sussex.

5.2.10 Diagram 5.2.1 shows the difference between the labour supply needed to support the increase in jobs forecast by CE (with the addition of jobs from the Project) and the labour supply that would likely be generated based on current housing trajectories. It suggests that current trajectories would yield a surplus in labour supply across the housing market area in the 26-year period, with surpluses in Horsham and Mid Sussex more than comfortably balancing the shortfall identified in Crawley in all of the key assessment years (and indeed throughout the entire period).

5.2.11 The overall housing market area surplus rises to c.10,000 by the late-2020s before continuing on a steady upward trajectory from the early 2030s onwards, reaching c.30,000 by 2047. Crawley's shortfall (of c.1,000 in 2038 and c.900 in 2047) is small relative to the anticipated overall surplus across the housing market area; given labour is mobile across a housing market area it cannot be concluded that the shortfall in labour supply in Crawley would lead to any material housing impacts (in terms of increased housing demand) in the borough. As shown in Table 5.2.2, the labour surplus exists across the HMA regardless of whether the Project is included.

Diagram 5.2.1: Difference in Labour Supply between CE+Project and Current Trajectory scenarios - North West Sussex HMA (total surplus/shortfall without the Project shown in black dashed line)



Source: Lichfields analysis

Other HMAs

5.2.12 Diagram 5.2.2 overleaf shows the outcomes by local authorities in each HMA (comparing current trajectories with Cambridge Econometrics, with the Project), and Diagram 5.2.3 shows the study area as a whole, by HMA. For comparison, the total labour shortfall / surplus by HMA without the Project is also shown in each chart; this helps illustrate the degree to which the inclusion of the Project impacts on the overall labour shortfall or surplus in each housing market area. This analysis shows:

- In **Croydon and East Surrey** there is anticipated to be a progressively increasing labour shortfall across the housing market area between 2027 and 2039 (during which time the Project is anticipated to reach peak employment), however without the Project the housing market area would be expected to see a shortfall up to 2037 in any event (as indicated by the black dashed line). This is partly due to the fact that these authorities represent some of the most constrained authorities in the study area (including those entirely covered by Green Belt) with some not having a local plan in place which meets housing needs in full. Indeed, in two authorities (Reigate & Banstead and Tandridge) the current housing trajectory ends in 2026, therefore any housing anticipated beyond this is an extrapolation; it is reasonable to expect plans to come forward in these areas soon which increase housing delivery above that currently anticipated (for example, more in line with the standard method or anticipated job growth). After 2040 the housing market area is anticipated to see a progressively growing labour surplus, even with the Project accounted for;
- In **North East Surrey** the labour shortfall and surplus is anticipated to fluctuate, with a shortfall in the immediate term (not a result of the Project), fluctuating between being broadly balanced and having a shortfall of up to c.1,200 in the years up to 2038, before returning to a progressively increasing surplus (with the Project). The shortfall is slightly less without the Project. However, all three authorities in this housing market area are entirely Green Belt constrained and have plans which pre-date the 2012 NPPF and therefore it is reasonable to assume that their current housing trajectories do not meet housing needs in full and will be revised so that anticipated housing delivery is higher;
- In **Coastal West Sussex** there is anticipated to be a labour shortfall in the immediate term (2022 and 2023 – with or without the Project), however from 2024 onwards there is a surplus of labour, which rises to c.15,000 by around 2030 (slightly higher without the Project) and remains at this level until the late 2030s when the surplus continues to rise; and
- In **Wealden and Eastbourne**, Eastbourne is anticipated to have a labour shortfall in every year starting immediately, however this is the case with or without the Project. Wealden's surplus does not balance this in the initial years (up to 2027), but this is true with or without the Project. From 2028 onwards, Wealden's surplus will result in an overall progressively increasing surplus across this housing market area, comfortably balancing Eastbourne's shortfall, with or without the Project.

5.2.13 Diagram 5.2.3 shows the study area as a whole, by housing market area, with the Project (the total without the Project is also shown). It summarises the earlier findings within this Section. It also shows that the surplus of labour in the North West Sussex Housing Market Area (Crawley, Horsham and Mid Sussex, where Gatwick is located) is relatively large in comparison to the shortfalls that exist in the other housing market areas that neighbour Crawley and Gatwick, namely the North East Surrey Housing Market Area (comprising Mole Valley, Elmbridge and Epsom & Ewell) and the Croydon and East Surrey Housing Market Area (comprising Reigate & Banstead, Tandridge and Croydon) in all the years the Project's operational jobs will be in place (i.e. 2024 onwards). Whilst labour is generally mobile within housing market areas, Gatwick is known to draw its labour supply from a labour market area which covers all three of these housing market areas. Given Gatwick is located on the very northern edge of the North West Sussex Housing Market Area, in very close proximity to Reigate & Banstead and Mole Valley, it is reasonable to expect that labour would be sufficiently mobile across these areas to balance any shortfalls.

5.2.14 Table 5.2.2 shows labour supply outcomes by HMA, with and without the Project and shows whether the inclusion of the Project is the determinant in whether there is labour shortfall or surplus in each HMA in each of the key assessment years. It shows that the only key assessment year in which the Project is potentially a determinant in any HMA (in other words, where the Project could cause the HMA to 'tip' from having an overall surplus to an overall shortfall) is in 2038, and this is only in the Croydon and East Surrey HMA. In this year, what would otherwise be a surplus of 904 in the labour supply in this HMA becomes a potential shortfall of 1,670 when the Project is included.

5.2.15 In 2038, Scenario 8a (current housing trajectories) indicates there will be a total labour supply of 370,770 in the Croydon and East Surrey HMA. The inclusion of the Project represents a change of 2,754 in the labour supply (+904 without the Project to -1,670 with the Project) which represents a magnitude of change of 0.7%. Based on the significance criteria used in Chapter 17 of the ES (Socio-Economics) for the labour market during the operational phase, impacts of up to 5% in the Labour Market Area are described as 'Very Low'. However it is important to recognise that the 'Croydon and East Surrey HMA' does not in itself form a study area for the purposes of the Socio-Economic assessment in the ES. Any housing impacts in this HMA are relevant only insofar as it is a constituent part of the Labour Market Area, the impact of which is referred to as a whole within the main Socio-Economic Chapter (para 17.9.137).

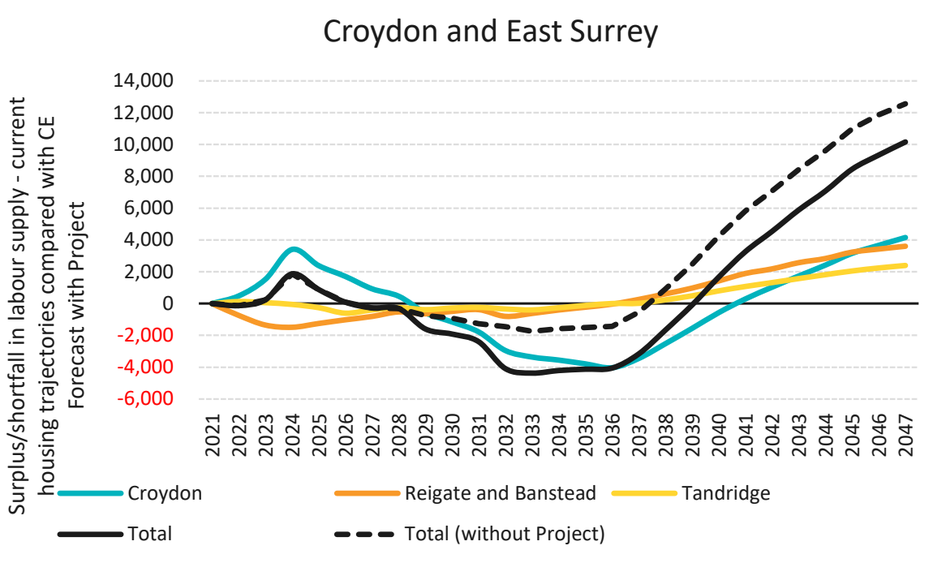
5.2.16 Furthermore, for the numerous reasons set out in this report, this analysis represents an overall worst-case scenario in terms of the Project's potential impacts on housing demand because:

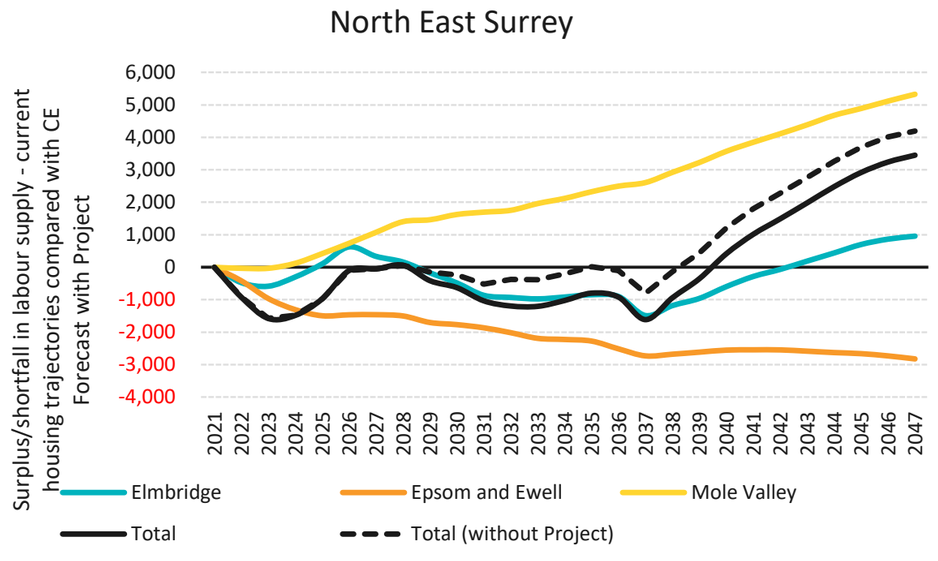
- It assumes that all jobs associated with the Project are net additional (over and above the Cambridge Econometrics / Experian forecasts). If this is not the case, overall job growth (with the Project) and labour demand will be lower than assess within this report. The analysis is therefore likely to be **the 'worst-case' scenario from a labour demand perspective**;

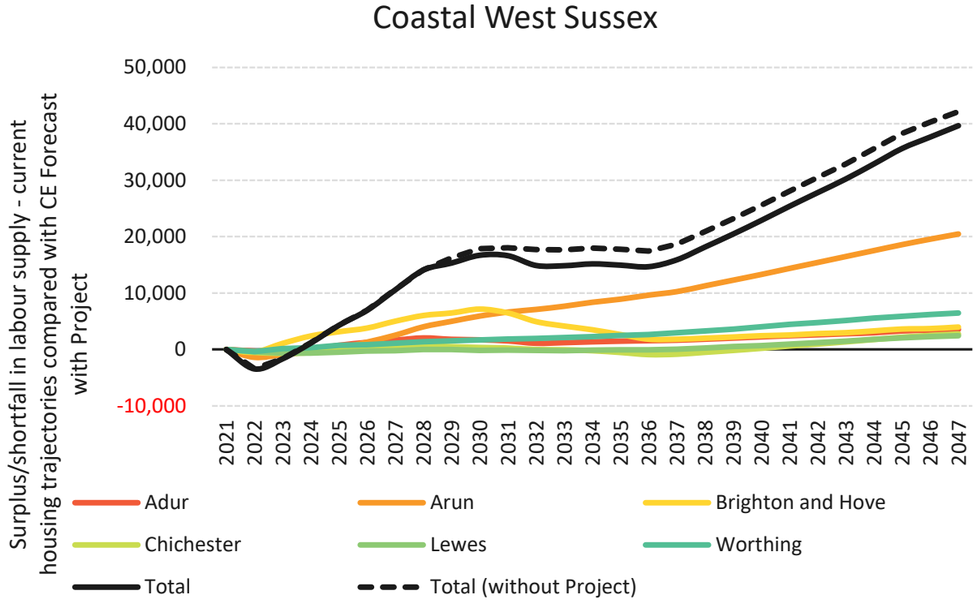
- The assessment applies a number of fixed assumptions around unemployment, economic activity and commuting. Any variation to these inputs which increases the availability of labour (e.g. reductions in unemployment, increases in economic activity, increases in in-commuting [or reductions in out-commuting]) will increase the labour supply in a given area without the need for additional housing. **These factors can flex in response to labour demand**, for example the additional labour demands associated with the Project; and
- The labour supply based on current housing trajectories represents the **'worst-case scenario' from a labour supply perspective** because current plans across the area do not make provision for full housing need, particularly in Green Belt authorities and the Coastal West Sussex HMA. Trajectories used in this analysis are extrapolated in the medium to longer term, and it is reasonable to assume that these plans will be revised in the future and provide a level of housing more in line with needs (which is far greater than recent delivery trends or housing in current trajectories).

5.2.17 The total labour surplus across the study area – 95,000 in 2047– represents over ten times the total number of additional workers which may be required to support the jobs associated with the Project (approximately 8,700 by 2047 as shown in Table 3.3.3 above). This is illustrative of the degree of flexibility within this assessment, and the scale of additional workers associated with the Project relative to the overall surplus of labour that is likely to exist within the study area by 2047.

Diagram 5.2.2: Difference in Labour Supply between CE+Project and Current Trajectory scenarios - other HMAs (total surplus / shortfall without the Project by HMA shown in black dashed line)







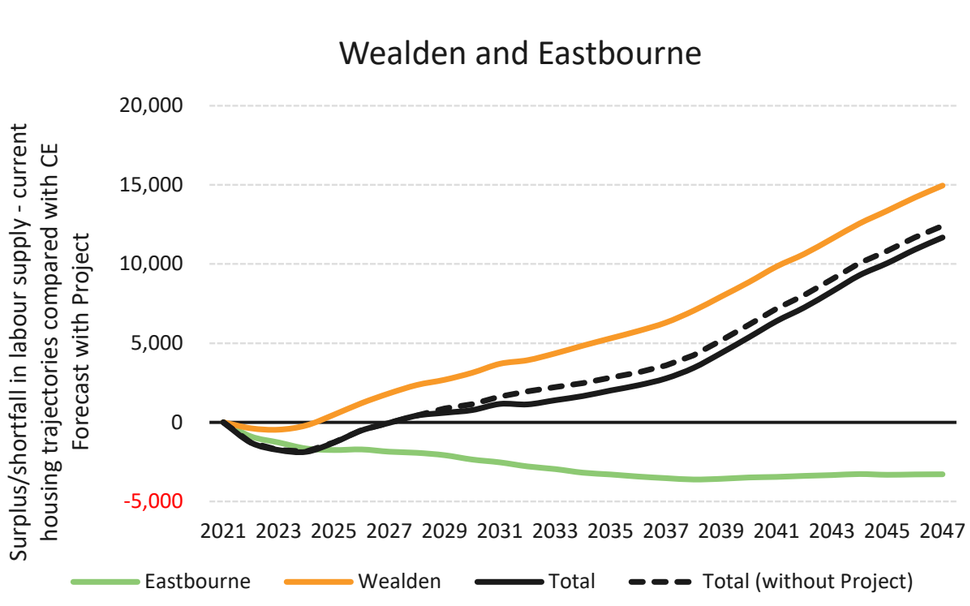


Diagram 5.2.3: Difference in Labour Supply between CE+Project and Current Trajectory scenarios – Study Area by HMA totals

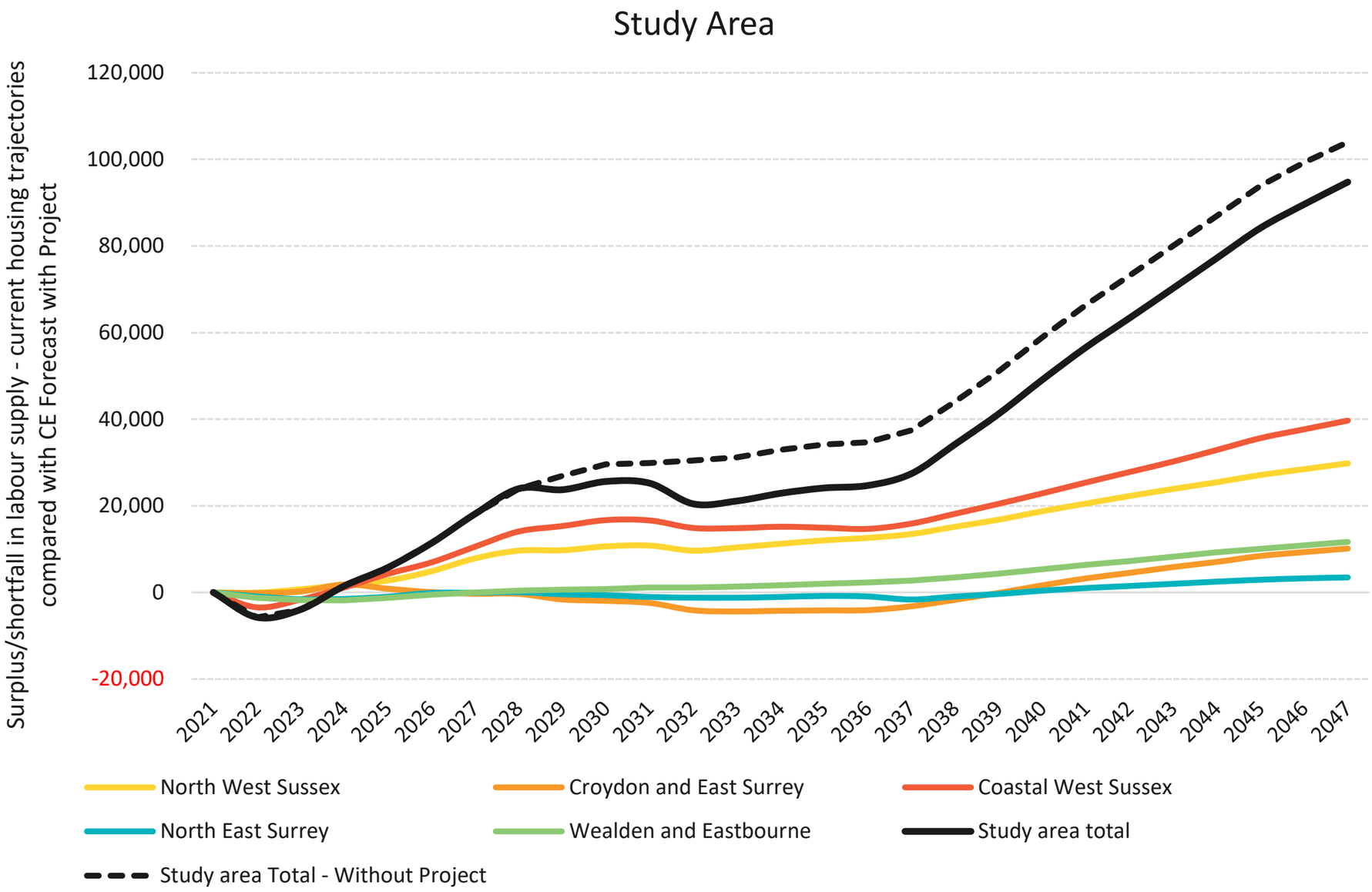


Table 5.2.2: Summary of surplus / shortfall in labour supply in key assessment years by HMA - Cambridge Econometrics scenario (with / without Project) compared with current housing trajectory scenario

	Without Project (Scenario 4a)					With Project (Scenario 5a)					Is inclusion of the Project a determinant in whether there is labour shortfall / surplus?				
	2024	**2029**	**2032**	**2038**	**2047**	**2024**	**2029**	**2032**	**2038**	**2047**	**2024**	**2029**	**2032**	**2038**	**2047**
North West Sussex	1,798	10,718	12,667	18,173	32,638	1,798	9,767	9,670	15,192	29,815	×	×	×	×	×
Croydon and East Surrey	1,864	-754	-1,456	904	12,557	1,864	-1,597	-4,089	-1,670	10,152	×	×	×	✓	×
Coastal West Sussex	1,157	16,247	17,703	20,885	42,197	1,157	15,348	14,911	18,187	39,699	×	×	×	×	×
North East Surrey	-1,482	-148	-371	-139	4,195	-1,482	-412	-1,192	-936	3,454	×	×	×	×	×
Wealden and Eastbourne	-1,851	874	1,957	4,233	12,403	-1,851	611	1,142	3,445	11,673	×	×	×	×	×
Total	**1,486**	**26,938**	**30,500**	**44,057**	**103,990**	**1,486**	**23,717**	**20,442**	**34,217**	**94,793**	~	~	~	~	~

Experian and Standard Method Housing

Study Area

5.2.18 The labour supply that would be needed to support job growth under the Experian forecasts with and without the additional demand arising from the Project (Scenarios 6a and 7a) have been compared with the labour supply that is expected to be generated based on authorities planning for housing need in line with the standard method (Scenario 9a).

5.2.19 Table 5.2.4 shows the results of this analysis. It shows that the study area as a whole is expected to have a shortfall in 2024 of 3,346, however this is the case with or without the Project. In subsequent assessment years, there is a substantial surplus across the study area (48,684 in 2029, rising to 201,271 by 2047 without the Project) and in most local authority areas. When the Project is included, this surplus is slightly less, at 45,439 in 2029 rising to 192,008 by 2047.

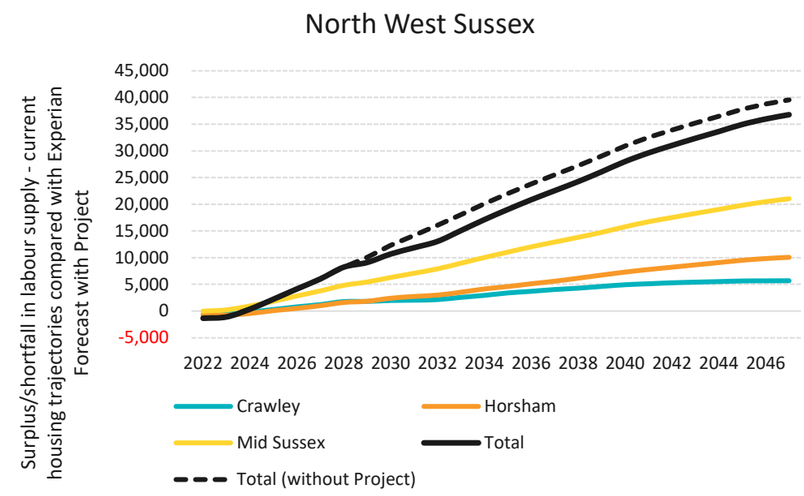
Table 5.2.4: Summary of surplus / shortfall in labour supply in key years by local authority - Experian scenario (with / without Project) compared with standard method housing scenario

	Without Project (Scenario 6a)				
	2024	**2029**	**2032**	**2038**	**2047**
Adur	-706	-439	-378	-565	-879
Arun	-319	4,217	6,560	11,366	18,527
B'n & Hove	4,559	15,184	19,855	27,214	32,834
Chichester	-1,227	-397	112	940	2,419
Crawley	-151	2,182	3,320	5,453	6,785
Croydon	-544	11,194	21,140	39,411	59,561
Eastbourne	-510	734	1,514	2,954	4,476
Elmbridge	-1,614	-1,252	-964	-124	-178
Eps. & Ew.	-203	1,354	2,315	4,214	5,457
Horsham	-460	2,109	3,876	7,023	10,879
Lewes	570	3,601	5,117	8,130	12,785
Mid Sussex	966	5,759	8,846	14,741	21,918
Mole Valley	61	1,578	2,155	3,316	4,261
R'te & Ban.	-3,140	-3,925	-4,660	-6,108	-10,904
Tandridge	190	2,469	3,796	6,615	10,428
Wealden	-102	3,505	5,810	10,422	18,147
Worthing	-717	812	1,740	3,311	4,754
Total	**-3,346**	**48,684**	**80,156**	**138,313**	**201,271**
	With Project (Scenario 7a)				
	2024	**2024**	**2032**	**2038**	**2047**
Adur	-706	-514	-612	-794	-1,093
Arun	-320	4,063	6,082	10,903	18,098
B'n & Hove	4,559	14,805	18,681	26,086	31,791
Chichester	-1,226	-469	-113	723	2,218
Crawley	-151	1,812	2,149	4,273	5,657
Croydon	-543	10,732	19,707	38,022	58,271
Eastbourne	-510	644	1,231	2,681	4,223
Elmbridge	-1,614	-1,343	-1,245	-395	-430
Eps. & Ew.	-203	1,272	2,061	3,967	5,228
Horsham	-460	1,821	2,973	6,134	10,045
Lewes	570	3,487	4,765	7,789	12,469
Mid Sussex	966	5,463	7,918	13,824	21,055
Mole Valley	61	1,489	1,875	3,042	4,006
R'te & Ban.	-3,139	-4,195	-5,508	-6,947	-11,694
Tandridge	190	2,334	3,374	6,201	10,043
Wealden	-102	3,331	5,268	9,897	17,660
Worthing	-716	709	1,416	2,995	4,460
Total	**-3,346**	**45,439**	**70,022**	**128,401**	**192,008**

North West Sussex

5.2.20 Table 5.2.4 above shows that Crawley is anticipated to have a shortfall in 2024, but this is true with or without the Project. The same is true in Horsham. In subsequent key assessment years both authorities have a labour surplus, with or without the Project. Mid Sussex is anticipated to have a surplus in every key assessment year, with or without the Project. Diagram 5.2.4 below shows that in 2024 (commencement of the Project), the surplus in Mid Sussex is sufficient to balance any shortfalls in Crawley and Horsham, with a growing surplus across the HMA as a whole for the remainder of the assessment period.

Diagram 5.2.4 Difference in Labour Supply between Experian+Project and standard method housing scenario - North West Sussex HMA (total surplus / shortfall without the Project shown in black dashed line)



Other HMAs

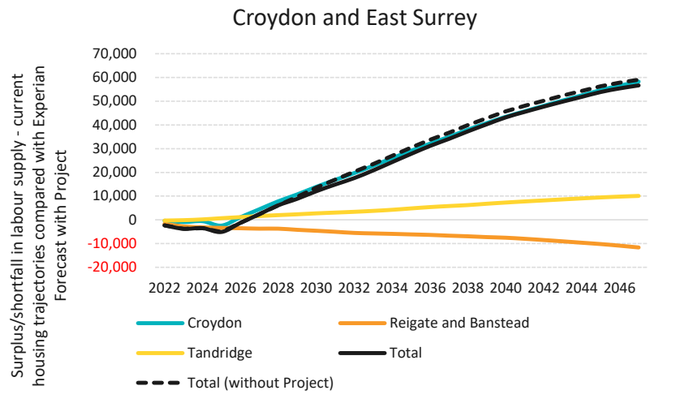
5.2.21 Other authorities in which there is a potential shortfall in labour supply between the Experian employment forecast and the standard method housing scenario (in any of the key assessment years after 2024) are Adur (all key assessment years), Chichester (although only to 2032), Elmbridge (all years) and Reigate & Banstead (all years).

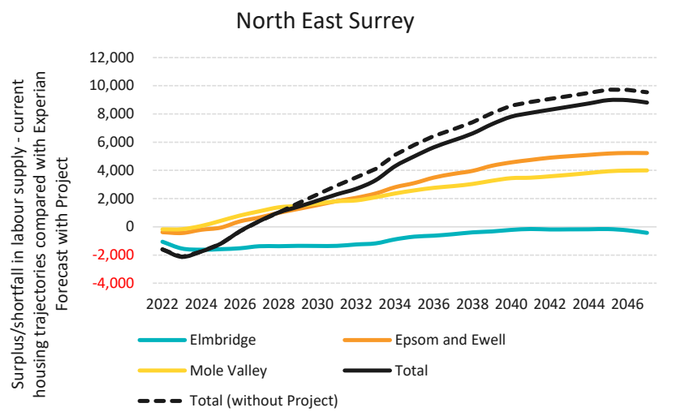
5.2.22 Diagram 5.2.5 shows the position across the housing market areas in which these authorities are located. It shows that:

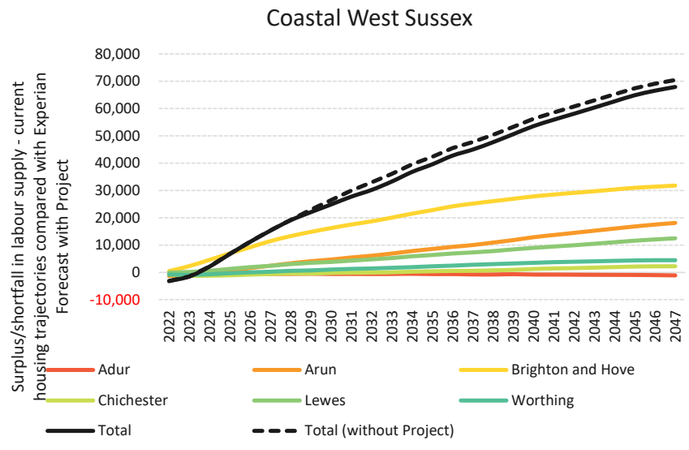
- In the Croydon and East Surrey HMA, a shortfall in labour supply is anticipated until 2026; post-2026 this changes to a surplus. This is the case with or without the Project i.e. the Project is not a determinative factor in this HMA;
- In the North East Surrey HMA the same pattern is expected; and
- In the Coastal West Sussex HMA a shortfall in labour supply is anticipated until 2023 (i.e. prior to the Project having an impact) and a surplus is anticipated thereafter; this is the case with or without the Project.

5.2.23 The other HMA – Wealden and Eastbourne – has a surplus in labour supply in both constituent authorities (Wealden and Eastbourne) in every key assessment year after commencement of the Project (i.e. post-2024).

Diagram 5.2.5: Difference in Labour Supply between Experian+Project and standard method housing scenario – other relevant HMAs







5.2.24 Looking at the HMAs in the study area as a whole, as shown in Diagram 5.2.6, whilst there is an anticipated shortfall in labour supply in the initial years of the assessment period (until 2024), this is the case with or without the Project because operational jobs associated with the Project are not anticipated occur until after 2024. From 2025 onwards there is anticipated to be a surplus in labour supply across all housing market areas and the study area as a whole in every key assessment year, which is c.45,000 by 2029 (the first year of opening) rising to c.70,000 in 2032 (interim assessment year), c.128,000 in 2038 (completion of construction works year) and c.192,000 by 2047 (long-term forecast year), with the Project. Without the Project, these surpluses are greater.

5.2.25 Table 5.2.5 summarises the labour supply position across the HMAs in the key assessment years with and without the Project; it confirms that in no HMA or key assessment year is the Project a determinative factor in whether any HMA has a shortfall of labour supply. All HMAs are anticipated to have a labour surplus in 2029, 2032, 2038 and 2047 without the Project; the inclusion of the Project results in a slight decrease in these surpluses.

5.2.26 The total labour surplus across the study area – 192,000 in 2047– represents over 20 times the total number of additional workers which may be required to support the jobs associated with the Project (approximately 8,700 by 2047 as shown in Table 3.3.3 above). This is again illustrative of the degree of flexibility within this assessment, and the scale of additional workers associated with the Project relative to the overall surplus of labour that is likely to exist within the study area by 2047.

Diagram 5.2.6 Difference in Labour Supply between Experian+Project and standard method housing scenario – Study Area by HMA totals

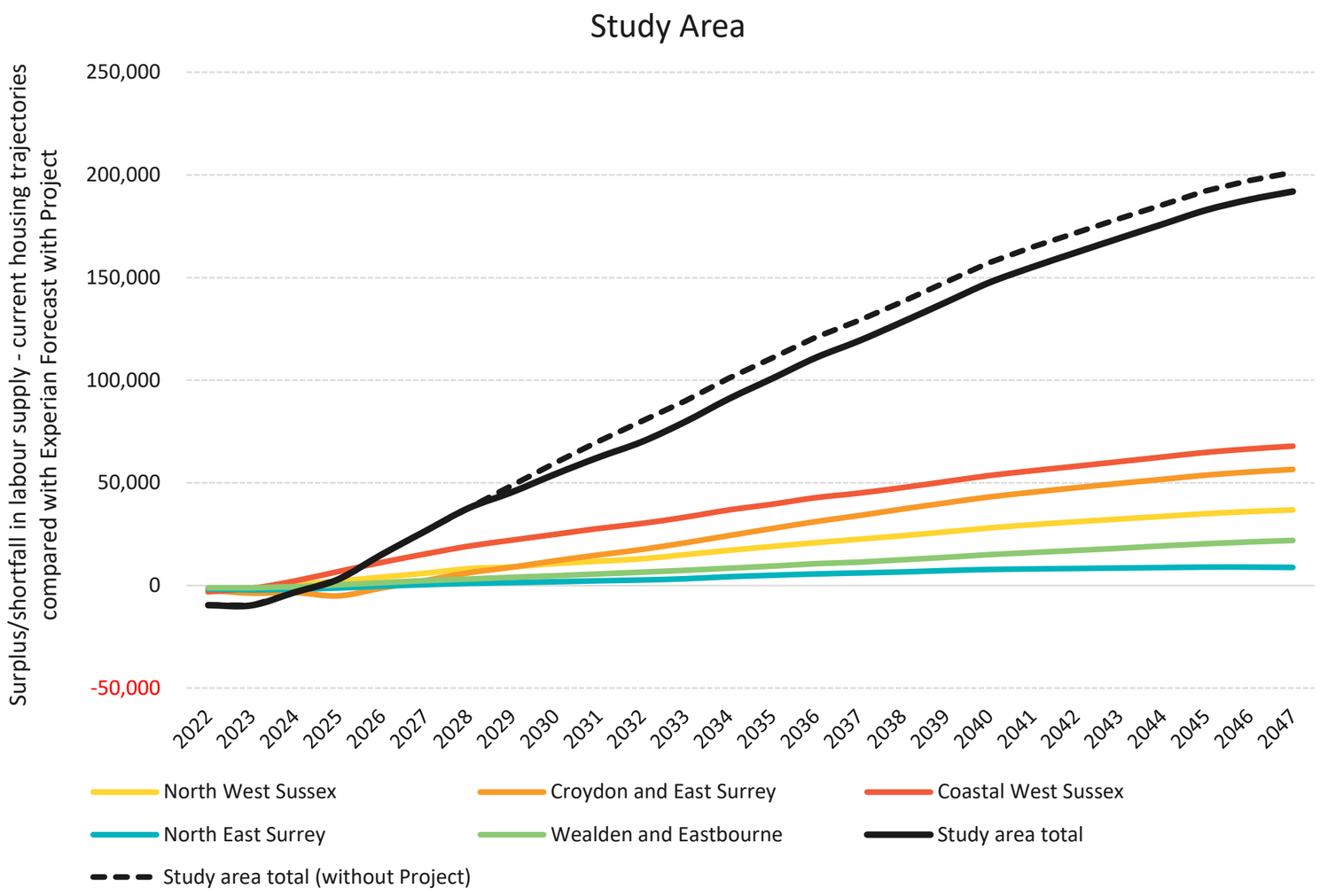


Table 5.2.5: Summary of surplus / shortfall in labour supply in key assessment years by HMA - Experian (with/without Project) compared with standard method housing scenario

	Without Project (Scenario 6a)					With Project (Scenario 7a)					Is inclusion of the Project a determinant in whether there is labour shortfall / surplus?				
	2024	**2029**	**2032**	**2038**	**2047**	**2024**	**2029**	**2032**	**2038**	**2047**	**2024**	**2029**	**2032**	**2038**	**2047**
North West Sussex	355	10,051	16,042	27,218	39,582	355	9,096	13,040	24,232	36,757	×	×	×	×	×
Croydon and East Surrey	-3,492	9,737	20,277	39,917	59,085	-3,492	8,871	17,573	37,276	56,620	×	×	×	×	×
Coastal West Sussex	2,162	22,978	33,007	50,397	70,439	2,162	22,080	30,219	47,703	67,943	×	×	×	×	×
North East Surrey	-1,757	1,679	3,506	7,407	9,539	-1,757	1,417	2,691	6,614	8,804	×	×	×	×	×
Wealden and Eastbourne	-613	4,239	7,324	13,377	22,623	-613	3,974	6,499	12,578	21,883	×	×	×	×	×
Total	**-3,345**	**48,685**	**80,156**	**138,315**	**201,269**	**-3,345**	**45,439**	**70,022**	**128,402**	**192,008**	~	~	~	~	~

5.3 Alternative scenarios

5.3.1 Were housing growth to increase in line with the standard method, however higher employment growth (as forecast by Experian) did not materialise, the result would be a greater labour surplus than indicated above in Section 5.2. To assess what the potential labour surplus could be under such a scenario Table 5.3.1 compares the labour supply that would be generated based on standard method housing with the labour supply that would be needed to support the Cambridge Econometrics forecast, with the Project included.

5.3.2 This shows that in every HMA within the study area there is a surplus of labour in every key assessment year. Individual local authority shortfalls after the Project jobs take effect (i.e. post-2024) are limited to four authorities; Adur, Chichester (but in both only until 2025), Elmbridge (until 2026) and Reigate & Banstead (until 2029). All are comfortably balanced by a substantial surplus of labour elsewhere in their own HMA in all key assessment years.

5.3.3 Of all the employment-led and housing-led scenarios assessed within this report, comparing the lowest employment-led scenario (CE, with the Project) with the highest housing scenario (standard method housing) represents an absolute best-case scenario in terms of potential labour supply in the study area. The labour surplus under this scenario would be 351,000 by 2047.

Table 5.3.1: Comparison of labour supply needed to support Cambridge Econometrics job forecast with the Project and labour supply generated by standard method housing by housing market area

	2024	2029	2032	2038	2047
North West Sussex	4,876	16,923	21,311	35,073	59,252
Croydon and East Surrey	2,890	23,650	36,481	65,797	112,158
Coastal West Sussex	10,257	38,826	50,230	75,237	122,177
North East Surrey	1,051	8,000	10,960	18,094	30,440
Wealden and Eastbourne	478	5,980	8,241	13,751	26,663
Study Area Total	**19,552**	**93,379**	**127,224**	**207,953**	**350,689**

Source: Lichfields analysis

5.4 Relationship with Heathrow expansion

5.4.1 Proposed expansion at Heathrow Airport will, as with Gatwick, have implications for labour supply and housing demand across a wide impact area. Due to uncertainty around the third runway at London Heathrow Airport (Heathrow R3), this development has not been included in the main cumulative effects assessment of the ES. However as Heathrow R3 remains Government policy, it has been considered separately and a qualitative assessment is provided below.

5.4.2 The starting point – for population, housing and labour supply impacts - is to determine whether there is any overlap between these impact areas (Gatwick and Heathrow) and, if so, whether there are any potential impacts (in terms of population, labour supply and housing) which need to be addressed.

5.4.3 The Heathrow EIA Scoping Report Chapter 10: Economics and Employment sets out several study areas across which impacts will be assessed. Of relevance to the Project is the wider sub-regional context area:

"A wider 'sub-regional context area' - The main function of this sub-regional area will be to provide an economic baseline and to consider its capacity to meet the 'wider' Heathrow generated growth. It is comprised of the 'Elizabeth Line West' area identified by the draft New London Plan, along with three LEP areas (Thames Valley Berkshire, Enterprise M3 and Buckinghamshire Thames Valley)." Heathrow Expansion EIA Scoping Report – Chapter 10: Economics and employment para 10.1.10 [2]

5.4.4 The extent of the Heathrow wider sub-regional context area is shown in Diagram 5.3.1 below, along with the relevant areas used for the purposes of the Project (the Gatwick Labour Market Area and the Gatwick Study Area used in this report).

5.4.5 This shows there is only overlap of one district between the Gatwick and Heathrow areas – Elmbridge in Surrey. The comparison of the labour supply generated by current housing trajectories and the labour supply needed to support the Cambridge Econometrics forecast of job growth (with the Project) for Elmbridge and the North East Surrey housing market area is shown above in Diagram 5.2.2. It shows that in Elmbridge specifically, there is expected to be a fluctuating shortfall in the labour supply until 2042, after which there is expected to be a growing surplus. Looking across the housing market area as a whole, the labour supply is expected to be broadly balanced in the late-2020s, although it has a fluctuating shortfall until 2040, after which there is expected to be a labour surplus. This is in the context of an overall surplus across the study area of 20-30,000 throughout the early 2030s and rising c.100,000 in the long-term (2047).

5.4.6 As shown in Table 5.2.1 however, the Project is not the determinative factor in whether Elmbridge has a shortfall or surplus of labour in any of the assessment years under this scenario; Elmbridge would be expected to have a labour shortfall even if neither the Project nor Heathrow came forward. Rather, the inclusion of the Project affects the scale of the shortfall, slightly increasing the shortfall (in 2029, an increase in the shortfall from -81 to -174 [an increase of 94], in 2032 from -640 to -930 [an increase of 290] and in 2038 from -899 to-1,179 [an increase of 280]). In the context of a labour force of approximately 80,000 in Elmbridge, these magnitudes of change in the shortfall equate to between 0.1% and 0.4% over the assessment period.

5.4.7 When comparing the labour supply needed under the Experian scenario (with the Project) and standard method housing (Diagram 5.2.5 above), this shows that Elmbridge is expected to have a shortfall of up to c.1,600 in the medium term, but this shortfall diminishes the long-term. Without the Project, Elmbridge is expected to see a very slight surplus between 2040 and 2046, although this returns to shortfall by 2047. Across the housing market area under this scenario there is an overall labour surplus from 2027 onwards which rises to c.9,500 in the long-term.

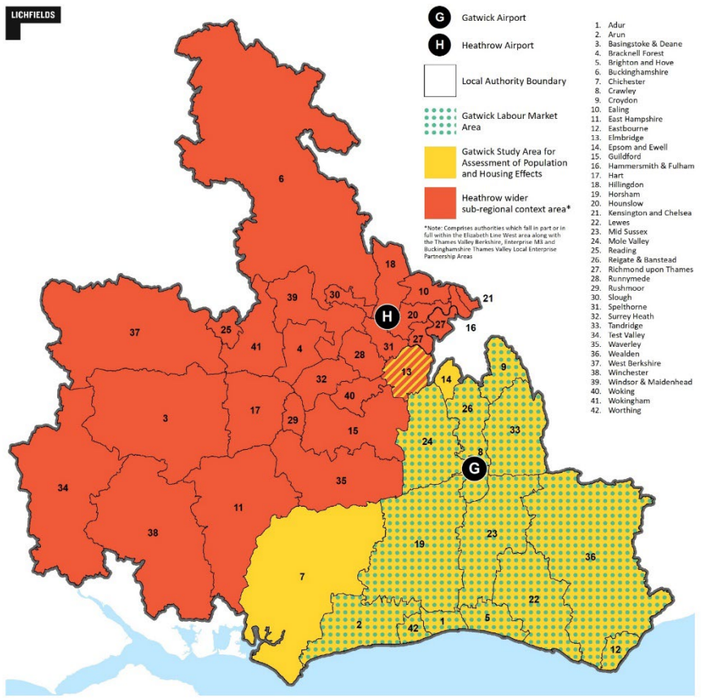
5.4.8 At the time of writing this report it is unknown how many net additional jobs Heathrow's third runway is expected to generate across Heathrow's wider sub-regional context area, and the exact timeframe for when these might be generated. In the local authority where there is an overlap between the two airport areas (Elmbridge) there is anticipated to be a shortfall between the amount of labour supply generated based on current housing trajectories and labour supply needed to support Cambridge Econometrics forecasts, however this is the case even if neither the Project nor Heathrow expansion came forward; the inclusion of the Project simply increases the shortfall by up to c.300 workers, equivalent to up to c.0.4% of the local authority's total labour supply. It is possible that employment generation associated with Heathrow will further add to this labour shortfall in Elmbridge, although the degree is currently unknown. As noted previously however this is a 'worst-case' scenario from a labour demand perspective because it assumes that all jobs associated with the Project are additional over and above the Cambridge Econometrics forecast. If any of the Project jobs are already accounted for in the Cambridge Econometrics forecast for Elmbridge then the labour supply impact of the Project will be less.

5.4.9 This shortfall in Elmbridge should be considered is in the context that across the Gatwick study area an overall a surplus labour supply of c.20-30,000 is anticipated in the medium term, which is

around 2-3 times the number of jobs generated by the Project, a significant proportion of which arises within the housing market area in which Gatwick is located (North West Sussex). This labour surplus is expected to continue rising up to 2047.

5.4.10 Furthermore, as previously noted, the assessment of the labour supply generated by current housing trajectories represents a 'worst-case scenario' because in the future local plans will be updated and expected housing delivery will increase (as a result of the standard method), in turn increasing the labour supply generated in the study area. As shown above, even taking into account potentially higher economic forecasts from Experian, the standard method housing scenario would still be expected to support a growing surplus of labour within the North East Surrey HMA over the lifetime of the Project (after 2029, up to 2047), with a significant amount of 'headroom' available for employment associated with Heathrow, in addition to a large and growing surplus of labour across the Gatwick study area as a whole. If employment growth were lower (i.e. in line with the lower of the two forecasts – Cambridge Econometrics) then the surplus of labour supply under the standard method housing scenario would be even greater.

Diagram 5.4.1 Heathrow Wider Sub-Regional Context Area and Gatwick Labour Market Area / Study Area for Assessment of Population and Housing Effects



5.5 Summary

5.5.1 Sections 3.0 and 4.0 established that overall, across the study area, the labour supply needed to support the growth in jobs forecast by Cambridge Econometrics with the additional workers arising from the Project (see Section 3.0, Diagram 3.4.1 Scenario 5a / b) was less than the labour supply generated by current housing trajectories (see Section 4.0, Diagram 4.5.1 Scenario 8a).

5.5.2 Looking more in-depth, in each of the assessment years and at individual housing market areas, suggests there are no notable 'pinch-points' where there may be particular extra pressures on housing demand when comparing expected job growth under the Cambridge Econometrics forecast (the lower of the two job forecasts) with the labour supply generated by current housing trajectories (the lower of the two housing scenarios), as a result of the Project. When comparing these scenarios there is expected to be surplus of labour supply in the North West Sussex HMA (where most of the additional jobs from the Project are concentrated) from the year the Project will become operational, as well as a significant surplus in the Coastal West Sussex HMA.

5.5.3 The labour supply position is tighter in the North East Surrey HMA, where overall shortfalls in labour are anticipated in 2038 (completion of construction works year), although this becomes a surplus by 2047 (long-term forecast). Importantly, the Project is not a determining factor as to whether this HMA has a shortfall of labour in each of the key assessment years; it simply increases existing shortfalls that would be expected to occur anyway.

5.5.4 In the Croydon and East Surrey HMA, the Project is a determining factor, resulting in what would otherwise be a labour surplus in 2038 (-904) becoming a shortfall when the Project is included (-1,670). This represents a magnitude of change of 2,574 which represents 0.7% of the overall labour force in the HMA at this point in time. In 2038, the study area as a whole is anticipated to have a surplus of 34,000 (with the Project), including a surplus of over 15,000 in the North West Sussex HMA (which is adjacent to the Croydon and East Surrey HMA).

5.5.5 The Project's impacts presented here represent a 'worst-case' scenario from a labour demand perspective as it assumes all jobs associated with the Project are additional to the forecasts, which over-estimates the labour demand associated with the Project. Furthermore, actual housing delivery (and therefore population and labour supply growth) is likely to be higher than that based on current housing trajectories, and could be as high as that assessed within the standard method housing scenario. Even accounting for potentially higher job growth (as forecast by Experian, rather than CE) there would be expected to be a greater (and growing) surplus of labour in the study area over the lifetime of the Project's operation (2029 onwards). This labour surplus would be even greater if future job growth were lower, in line with the Cambridge Econometrics forecast. Furthermore, a number of changes to the assumptions underpinning this analysis (e.g. reductions in unemployment, increases in economic activity and changes to commuting patterns) could yield a higher labour supply without any need for additional housing.

5.5.6 For these reasons, and because in the only HMA where the Project is a determining factor the potential shortfall (Croydon and East Surrey HMA) where the magnitude of change is only 0.7% of the overall labour supply, at a time (2038) when housing trajectories are extrapolated, at a time when the adjacent HMA (the North West Sussex HMA) has a surplus in labour supply of

over 15,000, at a time when the study area as a whole has a surplus of over 34,000 (c.3 times the total number of workers potentially associated with the Project), and by 2047 this is anticipated to have become a labour surplus, the Project is not concluded to be likely to have any material impacts on housing demand (as a result of labour demand) in any HMA within the study area in any key assessment year. The conclusions of the housing impacts of the Project in Environmental Impact Assessment terms, in accordance with defined matrices, are set out within Section 17.9 of Chapter 17 of the ES.

5.5.7 Looking at Heathrow's wider sub-regional context area shows just one authority of overlap with the Study Area – Elmbridge. The analysis suggests that current housing trajectories would be expected to lead to a shortfall in labour supply in Elmbridge compared with that needed to support the Cambridge Econometrics forecast, however this is true even if neither the Project nor Heathrow are included. The degree to which the Project increases the existing shortfall is relatively small in the context of Elmbridge's overall labour supply, and is also relatively small in the context of the surpluses of labour supply which exist elsewhere in the study area (namely the North West Sussex HMA) and the study area as a whole.

6 Housing need during construction

6.1 Context

6.1.1 This section considers the potential impact that temporary construction workers associated with the Project might have on housing need, specifically the need for accommodation associated with workers moving to the area on a temporary basis.

6.1.2 Analysis of construction employment has been prepared by Quod for the purposes of the Project (see Appendix 17.9.1 of the Environmental Statement). Broadly speaking, construction employment is expected to peak across two phases; firstly between 2024 and 2027, where there is expected to be in the region of c.1,000-1,300 construction workers. This is associated with the construction of the runway itself. The number of construction workers then falls to c.600-900 during the 2027-2029 period, before peaking again at c.1,300 in 2030 when construction associated with the terminal upgrade takes place. In the early 2030s construction workforce falls to c.400 per year, falling to <200 per year by the mid-2030s.

6.1.3 The peak of construction workers is anticipated in February 2027 at 1,357. The mix of construction trades includes a mix of labourers, masons, cladders, carpenters, electricians, drivers, and other trades, with a slight skew towards plant operators/drivers which is typical for infrastructure projects. The basis of this analysis is therefore based on the peak construction employment in 2027 (rather than presenting outputs for every key assessment year) on the basis that a peak of 1,357 workers represents the worst-case position across the construction period. At all other points in time (outside this peak period) the construction impacts (insofar as they relate to housing demand from workers) will be less than identified within this analysis.

6.1.4 Analysis prepared by Quod for the purposes of the Project (Appendix 17.9.1 of the ES) states that 5% of all UK construction workers are non-home based (NHB) and this is higher in the South East at 7% (Appendix 17.9.1 Section 4). Experience associated with Gatwick suggests this is higher, and therefore Quod recommends an assumption that 20% of workers will be NHB, equivalent to approximately 270 (of the peak, at 1,357). Quod consider this to be a conservative assumption (i.e. at the upper end of what might be likely, for the reasons set out at Section 4 of Appendix 17.9.1) and therefore this likely represents a worst-case scenario from the perspective of demand for temporary housing/accommodation for construction workers. The vast majority of these are expected to be located within Crawley (115, or 42.3% of all NHB workers) and Reigate & Banstead. In all other local authority areas, the number of construction workers is expected to be very small; for example, Mole Valley and Mid Sussex are expected to accommodate between 6 and 10 workers each, whilst all other authorities are expected to accommodate less than 5 NHB workers each. Some authorities which are expected to accommodate workers are located outside the study area used in this report (for example the London Boroughs of Sutton, Bromley and Merton, however these numbers are so small they will not have a significant impact if excluded from the analysis.

6.1.5 The authorities which are expected to accommodate more than one NHB construction worker at the project's peak construction demand year are shown in Table 6.1.1. Collectively these account for 250 (93%) of the 270 total. The North West Sussex Housing Market Area (NWS HMA), comprising Crawley, Horsham and Mid Sussex, accounts for nearly half (124) of workers. These are taken forward for analysis in this section as the 'key NHB authorities'.

6.1.6 Workers associated with these three authorities can be considered collectively in housing market terms because the authorities form their own housing market area. HMAs are geographical representations of where people search for housing, taking into account working and commuting patterns (inter alia). This means workers with jobs based in Crawley (including construction workers associated with the Project moving to the area temporarily for work) would be expected to search for housing within Crawley, Horsham or Mid Sussex, because of the transport links (e.g. road and rail) which link the areas.

6.1.7 Furthermore, some residential areas which are contiguous with the built-up area of Crawley (Ifield West, Kinwood Vale, West of Copthorne and Pease Pottage) are in fact located within the neighbouring districts of the HMA. Workers based in these areas would be (in technical terms) residents in Horsham or Mid Sussex, but would likely consider themselves to be living in Crawley (and using the amenities, services and transport links within the town).

Table 6.1.1: Distribution of NHB construction workers (at peak) within the key authorities

	NHB Workers
Crawley	115
Reigate and Banstead	110
Mole Valley	10
Mid Sussex	6
Tandridge	4
Horsham	3
Croydon	2
Total	**250**
NWS HMA	*124*

Source: Quod – see Appendix 17.9.1 of the ES. Note: Excludes authorities with 1 or fewer NHB workers.

6.2 Assessment of private rented sector

6.2.1 The construction workers are workers who will represent demand for temporary accommodation in the local area, including within the private rented sector on assured shorthold tenancies on rolling or fixed contracts across a range of time periods (weeks, months or years) depending on the nature of their role and contract length associated with the Project. As well as the private rented sectors, workers may use tourist accommodation and other tenures of permanent housing (further detail on which is set out below).

6.2.2 The 2011 Census shows that across the key authorities (which accommodate more than 1 NHB worker each) there were 70,678 households living in the private rented sector, including 22,102 in the NWS HMA, as shown in Table 6.2.1. This number has likely increased since the 2011 Census.

Table 6.2.1: Total number of households living in the private rented sector in key NHB authorities

	Households living in private rented sector (2011)
Crawley	6,717
Reigate and Banstead	7,659
Mole Valley	4,762
Mid Sussex	8,098
Tandridge	4,117
Horsham	7,287
Croydon	32,038
Total	**70,678**
NWS HMA	*22,102*

Source: Lichfields analysis of Census 2011 (LC4405EW). Note: Tenure refers to households not dwellings, therefore figures above do not include vacant dwellings.

6.2.3 The Census also provides information on the number of overall dwellings which are vacant, which has been used to estimate the amount of vacancy private rented dwellings. It should be noted that as vacancy data provided in the Census is not broken down by tenure, the estimate of vacant private rented dwellings set out below is likely to be an under-estimate because turnover (and therefore vacancy) is higher in the private rented sector than in any other tenure[31]. Household spaces (i.e. dwellings) with no usual residents include (but are not limited to):

- Homes which are vacant for transactional purposes (e.g. they are temporarily vacant after one household has left, and before another moves in);
- Homes which are in the process of being refurbished;
- Second homes;
- Homes which been left vacant after an occupier has passed away or moved into long-term care and have yet to be sold or re-let;
- Homes which are let as holiday homes (or other short-term lets to those not usually resident).

6.2.4 Table 6.2.2 shows that across the key NHB authorities there is estimated to be 1,970 vacant properties in the private rented sector (as of 2011; this is likely to have increased since as a result of housing growth generally). Around a quarter of these – 533 – are found in the NWS HMA.

Table 6.2.2: Estimation of number of vacant private rental properties in key NHB authorities

	Proportion of household spaces with no usual residents (i.e. vacant homes)	Estimated number of vacant private rental properties
Crawley	1.74%	119
Reigate & B'd	3.02%	239
Mole Valley	3.14%	154
Mid Sussex	2.30%	191
Tandridge	4.03%	173
Horsham	2.88%	216
Croydon	2.56%	843
Total	**2.71%**	**1,970**
NWS HMA	*2.35%*	*533*

Source: Lichfields analysis of Census (LC4405EW and KS401EW). Estimated number of vacant private rental properties based on total number of households in private rented tenure divided by the overall proportion of household spaces (i.e. dwellings) are occupied.

6.2.5 Further analysis based on the bedroom profile of the private rented sector in each authority suggests there are 4,198 bedrooms (equivalent to bedspaces, assuming 1 bedroom = 1 bedspace for a construction worker) across these authorities, as shown below in Table 6.2.3.

Table 6.2.3: Estimate of total bedspaces available in vacant properties in the private rented sector in key NHB authorities

	Estimated number of vacant private rental properties					Estimated total* bedspaces
	Total	**1-bed**	**2-bed**	**3-bed**	**4+bed**	
Crawley	119	29	39	38	12	271
Reigate & B'd	239	61	102	54	22	513
Mole Valley	154	41	60	37	16	337
Mid Sussex	191	45	76	50	19	424
Tandridge	173	33	75	45	20	396
Horsham	216	52	82	58	24	485
Croydon	843	281	325	178	59	1,699
Total	**1,970**	**559**	**767**	**472**	**172**	**4,198**
NWS HMA	*533*	*129*	*198*	*151*	*55*	*1,197*

Source: Lichfields analysis of Census (LC4405EW and KS401EW). *Note: For the purposes of this analysis it is assumed that homes with 4+bedrooms have 4 bedrooms, therefore the total bedspaces presented here are minimums given that some homes with 4 or more bedrooms will have 5 or more bedrooms.

6.2.6 Table 6.2.4 below shows the NHB workers in each authority as a proportion of the estimated total number of bedspaces in vacant privately rented homes. This assumes all NHB construction workers are accommodated within the private rented sector in homes which are currently vacant. As shown, at its peak the NHB construction workforce would represent just under 6% of vacant bedspaces across the authorities; this is highest in Crawley (42.4%) albeit this falls to 10.4% when looking across the North West Sussex HMA as a whole. Reigate and Banstead is expected to accommodate 21.5% of the construction workforce. Outside of these areas the proportion is <3%.

Table 6.2.4: NHB workers as a proportion of total bedspaces in key NHB authorities

	NHB workers as a proportion of vacant total bedspaces
Crawley	42.42%
Reigate and Banstead	21.45%
Mole Valley	2.96%
Mid Sussex	1.41%
Tandridge	1.01%
Horsham	0.62%
Croydon	0.12%
Total	**5.96%**
NWS HMA	*10.36%*

Source: Lichfields analysis of Census and Quod data – see Appendix 17.9.1 of the ES.

6.2.7 It should be noted that the above assessment likely represents a worst-case scenario in terms of housing demand from temporary NHB construction workers, because at every stage of the assessment conservative assumptions have been applied:

- The analysis is based on the number of homes at the time of the 2011 Census (as detailed housing data is not yet available from the 2021 Census). The overall stock of homes has increased in these authorities in the last 10 years, which would imply that the stock of privately rented homes – and therefore privately rented vacant homes – has also increased (assuming there has been no substantial changes in the tenure profile in each authority);

[31] Data from the English Housing Survey (Table FA4121 Demographic Characteristics of Recent Movers, latest data for 2020/21) shows that 20.5% of privately renting households moved in the last year, compared with an overall average of 6.9% for all households (this was 3.3% for owner occupiers and 5.8% for social renters).

- Similarly, this analysis takes no account of the further increase in housing stock generally that will occur in each authority by 2027 (the peak construction year) which would be expected to further increase the supply of privately rented (and therefore vacant privately rented) homes;
- Furthermore, if the proportion of privately rented homes has increased in these authorities since 2011 (or indeed increases in the future) this will suggest there are even more privately rented homes – and therefore vacant privately rented homes – available than shown in the analysis above. National trends[32] suggests this is likely to have occurred between 2011 and 2021;
- The proportion of rented homes which are vacant is likely to be higher than set out in this analysis, because the Census does not provide a breakdown of vacancy by tenure and other data shows turnover (and therefore implied vacancy) is higher in the private sector than any other tenure;
- The number of assessed bedspaces available is a minimum – because the Census groups all dwellings with 4 or more bedrooms together it is unknown how many of these dwellings have 5, 6, 7 or more bedrooms. For the purposes of this assessment we assume all dwellings with 4 or more bedrooms have 4 bedrooms (i.e. 4 bedspaces) which is therefore a minimum;
- The assessment of NHB workers as a proportion of vacant bedspaces relates to the peak construction month/s, when up to 1,357 total construction workers are required (assumed c.270 of which are NHB). These peaks are not expected to be maintained for more than 3-6 months at any one time, and for significant periods of the Project construction workforce (and therefore the number of NHB workers) is substantially less. For example, during the 2027-29 period the number of construction workers is expected to be around half to one-third lower than at the peak (which would reduce NHB workers as a proportion of vacant bedspaces in the private rented sector from 6.0% to c.3-4%); and
- The analysis assumes that all construction workers will be accommodated in homes which are currently vacant within the private rented sector. In reality this is unlikely to be the only method by which such workers are housed (these are considered further below) and will reduce the number of construction workers that vacant private rented homes will need to accommodate.

6.2.8 On the basis of the above, the conclusion that NHB workers represent 6.0% of the proportion of total vacant bedspaces within the private rented sector (and in particular, the relatively high rate of c.21% in Reigate and Banstead and c.10% in the NWS HMA) is almost certainly an estimate which can be considered a maximum.

6.3 Alternative forms of accommodation

6.3.1 The analysis so far has assumed that all construction workers are accommodated within the private rented sector. It has taken no account of the potential for some temporary NHB workers to rent from other – existing - households, i.e. those letting spare rooms to lodgers or those who may stay in local Hotel and B&B accommodation.

6.3.2 Whilst statistics on the number of owner-occupiers who have a lodger are limited, the 2011 Census shows there were 18,014 households in the key NHB authorities which were not single family households and were also not all full-time students or all over age 65. Such households include families with other adults or children living in the home (these could be relatives beyond immediate family, friends, or neither, e.g. lodgers), or multiple adult households (i.e. any combination of single people and/or couples living together) which could include individuals/couples/families and other adults, such as lodgers. These types of households comprised 6.3% of all owner-occupier households in the key NHB authorities in 2011, as shown in Table 6.3.1, and a proportion of these households will represent those with lodgers.

Table 6.3.1: 'Other' households a proportion of all owner-occupier households in key NHB authorities

	Owner-occupier households	Of which 'Other*' households	As a proportion
Crawley	25,228	2,052	8.13%
Reigate & B'd	40,486	1,961	4.84%
Mole Valley	26,362	1,054	4.00%
Mid Sussex	42,658	1,860	4.36%
Tandridge	25,302	1,269	5.02%
Horsham	40,926	1,695	4.14%
Croydon	85,230	8,123	9.53%
Total	**286,192**	**18,014**	**6.29%**
NWS HMA	*108,812*	*5,607*	*5.15%*

Source: Lichfields analysis of Census (DC4101EW). *This dataset excludes shared ownership households from owner-occupiers.

6.3.3 At the time of the 2011 Census there were 99,372 owner-occupiers within the key NHB authorities which had 1 spare bedroom and a further 135,968 with 2 or more spare bedrooms. This means that 81% of all owner-occupier households in the key NHB authorities had at least one spare bedroom as of 2011.

6.3.4 Table 6.3.2 shows that number of NHB construction workers at the peak year (2027) represents 0.11% of all owner-occupier households in the key authorities. In other words, if – hypothetically – all temporary construction workers were accommodated as lodgers with owner-occupied households, this implies 0.11% of all owner-occupiers in the key NHB authorities would accommodate a temporary construction worker. This does vary however, from 0.13% in the NWS HMA to <0.00% in Croydon.

Table 6.3.2: Owner-occupier households with spare bedrooms and NHB as a proportion in key NHB authorities

	Owner-occupier* households with spare bedrooms		NHB workers as a proportion
	1 spare	2+ spare	
Crawley	8,848	11,271	0.57%
Reigate & B'd	14,316	20,096	0.32%
Mole Valley	8,722	14,094	0.04%
Mid Sussex	14,928	22,005	0.02%
Tandridge	8,554	12,989	0.02%
Horsham	13,783	21,860	0.01%
Croydon	30,221	33,653	0.00%
Total	**99,372**	**135,968**	**0.11%**
NWS HMA	*37,559*	*55,136*	*0.13%*

[32] English Housing Survey 2020/21 Headline Report shows that 16.5% of all households nationally were private renters in 2010/11 and this has risen to 18.5% in 2020/21.

Source: Lichfields analysis of Census (LC4108EW) and Quod data – see Appendix 17.9.1 of the ES. *This Census dataset includes shared ownership households with owner-occupiers and therefore does not exactly correspond with other dataset where shared ownership households are counted separately.

6.3.5 It is also possible that some NHB construction workers will be accommodated within existing privately renting households (rather than in homes which are currently vacant, which was the focus of the analysis earlier in this section). The English Housing Survey (2019/20 report on the private rented sector) suggests that 1% of privately renting households nationally had paying lodgers. To assess whether this represents a feasible option for some NHB construction workers associated with the Project, Table 6.1.8 sets out the number of privately renting households in the key NHB authorities. It shows there are 70,678 households in the private rented sector as of 2011 and if – hypothetically – all construction workers were accommodated in such households, this would imply 0.35% of all existing privately renting households would accommodate construction workers.

6.3.6 Table 6.3.3 also shows that 20,272 privately renting households have 1 spare bedroom and a further 8,395 have at least 2 spare bedrooms. This demonstrates that there is more than enough capacity (in hypothetical terms) to accommodate the [up to] 250 NHB construction workers in the key authorities within this sector alone.

Table 6.3.3: Privately renting households and NHB as a proportion in key NHB authorities, and number with spare bedrooms

	Privately renting* households	NHB workers as a %	Privately renting* households with spare bedrooms	
			1 spare	2+ spare
Crawley	6,717	1.71%	2,014	805
Reigate & B'd	7,659	1.44%	2,609	999
Mole Valley	4,762	0.21%	1,656	776
Mid Sussex	8,098	0.07%	2,954	1,305
Tandridge	4,117	0.10%	1,414	732
Horsham	7,287	0.04%	2,639	1,343
Croydon	32,038	0.01%	6,986	2,435
Total	**70,678**	**0.35%**	**20,272**	**8,395**
NWS HMA	*22,102*	*0.56%*	*7,607*	*3,453*

Source: Lichfields analysis of Census (DC4105EWla) and Quod data – see Appendix 17.9.1 of the ES. *This Census dataset includes households living rent free with private renters.

6.3.7 It is also possible (indeed, likely) that some temporary construction workers who are on the shortest contracts may seek accommodation in hotels, B&Bs, hostels (or similar). A high level review suggests there are at least c.20 hotels, B&Bs or similar located in Gatwick's immediate proximity (i.e. less than c.1km from the airport) and a further c.15 in Crawley. Low cost hotels can also be found in Reigate (c.10km from Gatwick, straight line distance), Horsham (c.12km) and East Grinstead (c.13km), all easily accessible to Gatwick by road or public transport (rail). Even if a significant proportion of the NHB construction workers (which totals 270 workers at the peak) sought accommodation in the hotel/B&B sector, this would represent an insignificant proportion of the total rooms currently available in Gatwick and the immediately surrounding area.

6.4 Summary

6.4.1 Analysis by Quod prepared for the purposes of the Project (Appendix 17.9.1 of the ES) suggests the construction workforce will peak at c.1,400 workers in February 2027, of which it is estimated that up to 20% may be non-home based (NHB) and therefore require temporary accommodation, with the vast majority being located in Crawley and Reigate & Banstead. These workers will be accommodated in a number of ways, depending on their role (and therefore income available to spend on housing) and duration working on the Project.

6.4.2 This analysis has assessed the housing market's potential to absorb housing demand from temporary workers for the seven authorities where >1 NHB worker is expected to be accommodated; Crawley, Mid Sussex, Horsham (which make up the North West Sussex HMA), Reigate & Banstead, Mole Valley, Tandridge and Croydon. Collectively these account for 250 of the 270 NHB workers at the construction peak. It shows that the demand for temporary accommodation during the construction phase from NHB workers is unlikely to give rise to significant housing effects as the number of NHB workers (even at its peak) represents a very small proportion of the potential sources of supply available to meet this demand.

7 Employment and housing types

7.1.1 This section considers the types of employment associated with the Project during its operational phase and how this relates to the future mix of housing. For the purposes of the analysis in this section, we have considered two geographies:

- The study area (comprising the 17 authorities used throughout this report), on the basis that this is the geography across which housing impacts have been assessed; and
- The Gatwick adjacent authorities – these are the authorities which are immediately adjacent to Crawley, including North West Sussex (Crawley, Horsham, Mid Sussex) as well as Mole Valley, Reigate and Banstead and Tandridge.

7.1.2 The second geography has been considered because this section includes an assessment of how existing and future stock could cater to the employment-generated housing needs that are associated with the Project, through a review of:

- Recent completions and trends by housing type/size, based on the recent Annual Monitoring Reports;
- Local evidence of the tenures/types of housing need, e.g. as set out in a recent Strategic Housing Market Assessment;
- Local plan policies for housing mix; and
- Assessment of the mix of housing being provided on large-scale strategic sites, where these have reached reserved matters stage (and therefore a mix has been indicated) or have an indicative masterplan or DPD.

7.1.3 It is considered proportionate to this analysis to only undertake this detailed review for the authorities which are specifically within the housing market area in which Gatwick is located, as well as any other immediately adjacent authorities which are likely to experience the greatest (if any) housing effects.

7.1.4 Furthermore, the Project's operational employment is not anticipated to commence until 2029 and will peak in 2032; most housing which will come forward at this time is not currently in the pipeline (or, if it is, sufficient detail is not yet available about the type of housing those schemes will deliver, for example if they are at outline stage), as authorities are only required to maintain a supply of specific, deliverable sites for the next five years. In addition, it is possible that many authorities will update their evidence base and/or local plan policies by this time. These factors could result in different housing mixes coming forward at the time when the Project's operational effects will be mostly experienced, compared with those described in this section. Indeed, if any needs associated with the Project are identified and known about before such schemes or policies come forward it is reasonable for authorities to take account of such needs in their evidence base and policies. There is therefore some scope to shape future housing delivery to address the needs of the Project, should any specific needs be identified. The analysis in this section should therefore be read as indicative, based on current information available, rather than a definitive picture of whether future housing delivery will precisely match any needs associated with the Project.

7.2 Employment associated with the Project

7.2.1 Oxera has provided a breakdown of the employment associated with the Project (operational) at its peak – 2032 – for the study area and immediately adjacent authorities (in aggregate) by National Socio-Economic Classification ('Ns-Sec'). Ns-Sec has been used as ONS collects Census information on the characteristics of people and households cross-tabulated by Ns-Sec, which allows for analysis of population and housing impacts associated with the different employment types arising from the Project. This breakdown is shown in Table 7.2.1.

Table 7.2.1: Breakdown of Project jobs by National Socio-Economic Classification (at Project peak, in 2038)

Ns-Sec	Gatwick adjacent authorities		Study area	
1. Higher manag., admin. & prof. occupations	474	10%	1,036	11%
2. Lower manag., admin. & prof. occupations	986	21%	2,161	23%
3. Intermediate occupations	630	13%	1,309	14%
4. Small employers & own account workers	542	11%	1,133	12%
5. Lower supervisory &technical occupations	891	19%	1,422	15%
6. Semi-routine occupations	500	10%	1,097	12%
7. Routine occupations	770	16%	1,313	14%
Total	**4,793**		**9,471**	

Source: Oxera

7.2.2 Table 7.2.2 below shows how the existing employment base (in terms of all residents aged 16-74) compares with the profile of employment associated with the Project. In the Gatwick-adjacent authorities there are lower proportions of Project employment in Ns-Sec groups 1-3 compared with the existing profile of the area, a similar proportion in group 4 and higher proportions in groups 7-9. Groups 7-9 include lower supervisory and technical occupations, semi-routine and routine occupations (such as construction operatives, train drivers, electricians, scaffolders, cleaners, labourers and waiters).

Table 7.2.2: Comparison of employment by Ns-Sec – Existing (people age 16-74) and Project

Ns-Sec	Gatwick adjacent authorities		Study area	
	Existing*	Project	Existing	Project
1. Higher manag., admin. & prof. occupations	16%	10%	14%	11%
2. Lower manag., admin. & prof. occupations	28%	21%	28%	23%
3. Intermediate occupations	17%	13%	16%	14%
4. Small employers & own account workers	12%	11%	13%	12%
5. Lower supervisory & technical occupations	7%	19%	7%	15%
6. Semi-routine occupations	13%	10%	14%	12%
7. Routine occupations	8%	16%	8%	14%

Source: Oxera, Lichfields analysis of 2011 Census KS611UK. *Existing split excludes students, never worked and long-term unemployed.

7.3 Occupancy patterns

7.3.1 Across the Gatwick-adjacent authorities there is a slightly higher proportion of owner-occupier households compared with the study area (73% compared with 69%), and a lower proportion of social rented households (14% compared with 18%). This is shown in Table 7.3.1.

7.3.2 Table 7.3.1 also shows the tenure split by the Ns-Sec of the Household Reference Person (HRP). This shows that in both areas there is a clear trend between Ns-Sec and tenure; households in higher Ns-Sec groups are more likely to be owner-occupiers and less likely to be private or social renters compared with those in lower groups (although this trend is far more pronounced in the social rented tenure). If the Project is anticipated to generate additional employment in these lower

groups, it is important to consider whether the Project may have implications on the demand for different types of housing.

Table 7.3.1: Tenure by Ns-Sec (Household Reference Persons)

Ns-Sec	Owner-occupied*	Private rented**	Social rented***
Gatwick adjacent authorities			
1. Higher manag., admin. & prof. occupations	86%	11%	3%
2. Lower manag., admin. & prof. occupations	80%	13%	7%
3. Intermediate occupations	75%	13%	12%
4. Small employers & own account workers	76%	13%	10%
5. Lower supervisory &technical occupations	65%	16%	19%
6. Semi-routine occupations	55%	16%	29%
7. Routine occupations	49%	16%	35%
All* (number of homes)**	**73% (203,292)**	**14% (38,223)**	**13% (36,836)**
Study Area			
1. Higher manag., admin. & prof. occupations	83%	14%	3%
2. Lower manag., admin. & prof. occupations	77%	17%	6%
3. Intermediate occupations	72%	16%	12%
4. Small employers & own account workers	73%	17%	10%
5. Lower supervisory & technical occupations	63%	20%	17%
6. Semi-routine occupations	53%	21%	26%
7. Routine occupations	49%	21%	30%
All (number of homes)	**69% (661,914)**	**18% (170,492)**	**13% (123,421)**

Source: Lichfields analysis of 2011 Census LC4605EW. *Owner-occupied includes shared ownership. ** Private rented includes living rent free. ***All includes students, never worked and long-term unemployed. ***For the purposes of the Census 'Social Rented' includes those who rented from a local authority or another (e.g. registered provider) and therefore is synonymous with affordable rented housing which is typically used for planning purposes (which incorporates social and affordable rent).

7.3.3 Based on the socio-economic profile of the Project jobs shown in Table 7.2.1 and the current occupancy patterns by Ns-Sec of the HRP shown above in Table 7.3.1, Table 7.3.2 shows the implied tenure mix which would be required to accommodate workers associated with the Project. For example, for the Gatwick adjacent authorities employment estimates suggest a total of 474 jobs will be in Ns-Sec Group 1 (Higher managerial, administrative and professional occupations) – within the existing stock, 86% of people in this group are owner-occupiers, 11% are private renters and 3% are social rented, implying those 474 jobs would require 408 owner-occupied homes, 54 private rented homes and 12 social rented homes. This is repeated across each occupation classification and aggregated to give an overall tenure profile.

7.3.4 This assumes that each worker associated with the Project is the HRP of an individual household; this represents a worst-case scenario from a housing demand perspective because it is possible that in some households there may be two (or more) workers associated with the Project who live in the same household. In such circumstances, only one individual (typically the person in the higher/highest Ns-Sec) will be counted as the HRP and there will not be additional demand for housing associated with the person/s in the lower Ns-Sec.

Table 7.3.2: Implied tenure mix based on Ns-Sec of Project jobs and existing occupancy patterns

Ns-Sec	Jobs	Implied tenure mix		
		Owner-occ.	Private rented	Social rented
Gatwick adjacent authorities				
1. Higher manag., admin. & prof.	474	408	54	12
2. Lower manag., admin. & prof.	986	789	133	65
3. Intermediate occupations	630	472	82	76
4. Small employers etc.	542	413	73	56
5. Lower supervisory & technical	891	575	145	171
6. Semi-routine occupations	500	277	79	145
7. Routine occupations	770	380	123	267
All	**4,793**	**3,314**	**688**	**791**
All (%)		**69%**	**14%**	**17%**
Study Area				
1. Higher manag., admin. & prof.	1,036	863	147	27
2. Lower manag., admin. & prof.	2,161	1654	368	138
3. Intermediate occupations	1,309	946	212	151
4. Small employers etc.	1,133	828	195	110
5. Lower supervisory & technical	1,422	891	290	242
6. Semi-routine occupations	1,097	581	235	281
7. Routine occupations	1,313	643	275	395
All	**9,471**	**6,406**	**1,720**	**1,344**
All (%)		**68%**	**18%**	**14%**

Source: Lichfields analysis of Oxera and 2011 Census

7.3.5 Because the Project jobs are skewed slightly more towards lower Ns-Sec groups, the resulting implied tenure mix is also more skewed towards social rented housing compared with the existing stock in each of the areas; this is summarised in Table 7.3.3 below.

7.3.6 Across the Gatwick-adjacent authorities the Project jobs imply a need for 17% social rented housing and 69% owner-occupier housing (the proportion of private rented housing is the same). Across the study area the Project jobs imply a need for 14% social rented housing and 68% owner-occupier housing (again the proportion of private rented housing is the same), which is more closely aligned with the current tenure profile.

Table 7.3.3: Comparison of existing tenure mix and implied tenure mix based on Project jobs

Ns-Sec	Owner-occupied	Private rented	Social rented
Gatwick adjacent authorities			
Existing	73%	14%	13%
Implied, based on Project jobs	69%	14%	17%
Study Area			
Existing	69%	18%	13%
Implied, based on Project jobs	68%	18%	14%

Source: Lichfields analysis

7.4 Recent and planned housing growth

7.4.1 To understand whether recently delivered or planned housing growth is in line with the types of housing being delivered, this section assesses recent completions, local evidence of need, plan policies and upcoming sites in the adjacent authorities (six local authorities). This is considered a proportionate response, particularly given that the greatest need for social rented housing (and where the greatest disparity exists between existing tenure profile and the tenure profile implied by the Project) is within the adjacent authorities.

Recent completions

7.4.2 Table 7.4.1 shows the proportion of housing which has been delivered in recent years in the adjacent authorities which has been affordable. Crawley and Tandridge have seen the greatest affordable housing delivery (as a % of all housing) at 30-35%. Affordable housing delivery has been lowest in Mole Valley, at 10%. Overall, across the authorities 21% of new housing which

has been delivered in the last 3-4 years has met the definition of being affordable housing.

Table 7.4.1: Percent of completions in the Gatwick adjacent authorities which have been affordable – 2018 to 2021

	2018	2019	2020	2021	Total
Crawley	39%	29%	41%	~	**35%**
Horsham	22%	23%	23%	29%	**24%**
Mid Sussex	12%	15%	21%	22%	**18%**
Mole Valley	9%	14%	2%	10%	**10%**
Reigate & Banstead	17%	13%	27%	12%	**17%**
Tandridge	27%	23%	48%	8%	**30%**
Total	**20%**	**20%**	**26%**	**17%**	**21%**

Source: Lichfields analysis of Annual Monitoring Reports. For Crawley a 2020/21 AMR is not yet available, so total for Crawley relates to 2018-20 only.

7.4.3 Recent delivery across these areas is therefore notably higher than the proportion of affordable rented housing in the existing stock (13%) and the implied need based on the Project (14-17%). Assuming these delivery trends continue (or indeed improve) then employment associated with the Project is not expected to place any additional pressures on affordable housing delivery beyond that which might be expected.

Local evidence of housing need

7.4.4 As part of the preparation of local plans, the authorities have prepared evidence of future housing need, typically in the form of a Strategic Housing Market Assessment (SHMA) or similar. A review of SHMAs within the Gatwick adjacent authorities has been conducted and shows the following.

North West Sussex (Crawley and Horsham)

7.4.5 In November 2019, a North West Sussex SHMA was produced on behalf of Crawley and Horsham Councils (it confirmed that Mid Sussex continued to form part of the HMA, but did not provide an assessment of Mid Sussex's housing needs). This SHMA concluded that the affordable housing need in the two authorities is as shown in Table 7.4.2 below. As a proportion of the overall housing need set out in the SHMA (calculated based on the standard method, as per the data available at the time), the affordable (rented) housing need equates to 75% of the overall need in Crawley and 36% of need in Horsham.

Table 7.4.2: Affordable housing need assessed in North West Sussex SHMA (Crawley and Horsham)

	Affordable* need (per annum)	Total need (per annum)	Affordable %
Crawley	563	752	75%
Horsham	344	965	36%

Source: North West Sussex SHMA (2019). *Refers to affordable rented need only [not affordable home ownership] for consistency with analysis earlier in this section.

7.4.6 Planning Practice Guidance (PPG) on housing needs of different groups (including those in need of affordable housing) recognises that the needs of different groups can exceed, or be proportionally high in relation to, the overall housing need figure; this is because the needs of particular groups will often be calculated based on the whole population of an area whereas overall housing need (as calculated by the standard method) is a net measure of household growth year on year (plus an uplift for market signals). It is for strategic policy-making authorities to consider the extent to which the identified needs of specific groups can be addressed in the area, taking into account factors such as deliverability and viability. However, the degree of identified need within the evidence of Crawley and Horsham is clear recognition that there is a substantial need for affordable housing at a level which far exceeds the existing mix (13%) or the need associated with the Project (14-17%).

Mid Sussex

7.4.7 In October 2021 a SHMA was produced for Mid Sussex (this was prepared by the same authors as the North West Sussex SHMA for Crawley and Horsham in 2019 and therefore follows the same methodology). It suggests that affordable (rented) need in Mid Sussex comprises 43% of overall housing need. Similar to the position in Crawley and Mid Sussex, this is substantially higher that the proportion of affordable rented housing in the existing stock and the need associated with the Project.

Table 7.4.3: Affordable housing need assessed in Mid Sussex

	Affordable* need (per annum)	Total need (per annum)	Affordable %
Mid Sussex	470	1,093	43%

Source: Mid Sussex SHMA (2021). *Refers to affordable rented need only [not affordable home ownership] for consistency with analysis earlier in this section

Mole Valley

7.4.8 The latest SHMA for Mole Valley was produced in 2020 and suggests that 19% of total need is for affordable (rented) housing, as shown in Table 7.4.4. Again, this is higher than the existing mix of affordable rented housing (13%) or the need associated with the Project (14-17%).

Table 7.4.4: Affordable housing need assessed in Mole Valley

	Affordable* need (per annum)	Total** need (per annum)	Affordable %
Mole Valley	87	453	19%

Source: Mole Valley SHMA (2020). *Refers to affordable rented need only [not affordable home ownership] for consistency with analysis earlier in this section. This represents 87 of the total need of 143. **Based on standard method, although the SHMA does present alternative projections of need.

Reigate & Banstead

7.4.9 In 2019 Reigate and Banstead carried out a review of its Core Strategy (adopted in 2014) which concluded that no policies currently need modifying or updating, and that it remained a robust, up to date, and appropriate strategic policy framework for managing development in the borough. As part of this review, the Council commissioned a Housing Need Assessment (HNA) to provide evidence on the type, size and tenure of housing that would be required. However the HNA did not present an unconstrained assessment of overall housing need (e.g. based on the standard method), rather, it made its assessment of housing needs based on anticipated delivery of 580 dwellings per year over the next 10 years. It did however present an unconstrained assessment of affordable housing need, which is 438 per annum. As a proportion of future delivery this equates to 76% of all housing; when compared with housing need based on the standard method (calculated at the time of writing this report) this is slightly lower at 68%.

Table 7.4.5: Affordable housing need assessed in Reigate & Banstead

	Affordable* need (per annum)	Total need (per annum)	Affordable %
Anticipated delivery	438**	580	76%
Standard method		644	68%

Source: Reigate and Banstead Housing Need Assessment (HNA) (2019). *Refers to affordable rented need only [not affordable home ownership] for consistency with analysis earlier in this section. **For the purposes of this assessment we have excluded the 15 units of pipeline supply from the net affordable housing need figure.

7.4.10 In either case, the identified need for affordable housing in Reigate & Banstead is clearly substantially higher than existing

affordable housing stock or the affordable need associated with the Project.

Tandridge

7.4.11 In 2018 Tandridge Council published a series of technical papers, including one which assessed its affordable housing need; this showed affordable rented need was 391 per year (for five year, until the backlog was cleared), and 310 per annum thereafter. The Council's Housing Topic Paper for its emerging local plan sets out that its housing need according to the standard method (at the time of submission) was 645 per year, however the Council considers that its actual housing need is lower, at 398 per year.

7.4.12 Depending on which figures are used, the affordable need equates to between 48% and 98% of total need, as shown in Table 7.4.6. In any event the identified need for affordable housing in Tandridge is clearly substantially higher than existing affordable housing stock or the affordable need associated with the Project.

Table 7.4.6: Affordable housing need assessed in Tandridge

	Affordable* need (per annum)	Total need (per annum)	Affordable %
Tandridge	391 (310)	398-645	48-98%

Source: Tandridge Affordable Housing Needs Assessment Technical Paper (2018) and Tandridge Local Plan Housing Topic Paper (2019). *The SHMA confirms that the identified need excludes those in need of shared ownership, because these households would have sufficient income to rent privately.

Summary

7.4.13 Analysis of evidence of housing need produced by the adjacent authorities clearly illustrates that future affordable housing need exceeds that in the existing stock. The level of affordable housing need (as a proportion of overall need) which might be associated with the Project does not exceed the amount of affordable housing need which authorities already recognise within their evidence.

Local plan policies

7.4.14 In recognition of the substantial affordable housing needs that exist across most authorities in the Gatwick adjacent area, many local plans have policies (adopted or emerging) which seek to maximise the amount of affordable housing, subject to viability constraints. A review of adopted and emerging plans in these authorities shows the following.

Crawley

7.4.15 The Crawley Local Plan (adopted 2015) Policy H4 sets a requirement for 40% affordable housing on all developments, comprising 70% affordable (or social) rent and 30% intermediate tenures. In addition, there is a requirement for a further 10% of housing to be provided at a discount for first-time buyers on schemes of 15 or more dwellings. The emerging local plan (Reg 19, January 2021) Policy H5 similarly requires 40% affordable housing, with a slightly amended tenure mix of 75:25 rented to intermediate.

Horsham

7.4.16 The Horsham District Planning Framework (adopted 2015) Policy 16 requires 35% of all housing to be affordable on sites of 15 or more dwellings. Although not policy, the Council targets a 70:30 mix between rent and intermediate. The emerging local plan is currently at Reg 18 stage and is therefore not sufficient progressed to provide an emerging affordable housing policy position.

Mid Sussex

7.4.17 The Mid Sussex District Plan (adopted 2018) Policy DP31 requires 30% of all housing to be affordable, typically at a 75:25 tenure split. The emerging district plan (Reg 18, published November 2022) Policy DPH32 similarly takes forward the existing 30% affordable housing requirement with the same tenure split.

Mole Valley

7.4.18 The Mole Valley Core Strategy (adopted 2009) Policy CS4 set a target of 950 affordable homes (minimum) over the period 2006 to 2026, which represented 40% of the housing requirement. The emerging local plan, which was submitted for examination in February 2022, Policy H3 similarly takes forward the requirement for 40% affordable housing (of which split 70:30 between rented and intermediate). For flatted developments of up to 40 units within the built-up area the requirement is slightly lower, at 30% affordable (split 50:50 between tenures) and for specialist schemes for specific groups (such as the elderly) the affordable requirement is 40% of which all is to be for affordable rent.

Reigate & Banstead

7.4.19 The Reigate & Banstead Core Strategy (adopted 2014) Policy CS15 requires 30% affordable housing on sites of 15 or more units (on sites of 10-14 units a financial contribution equivalent to 20% is sought). The Core Strategy was reviewed by the Council in 2019 which concluded its policies did not require updating and therefore there is no emerging policy position which might supersede the Core Strategy requirement in the immediate future.

Tandridge

7.4.20 The Tandridge Core Strategy (adopted 2008) Policy CSP4 requires 34% affordable housing on sites of 15 or more units in the built-up area and sites of 10 or more units in the rural area. In terms of tenure split the policy requires up to 75% to be for rent. In January 2019 Tandridge submitted its new local plan for examination; this contains Policy TLP12 which requires 20% affordable housing on sites of 15 or more dwellings in urban settlements and 40% on other sites.

Conclusion

7.4.21 This review of local plan affordable housing policies illustrates policies for affordable housing which are in place within the adjacent authorities already expect a level of affordable housing which exceeds that in the existing stock. The level of affordable housing need (as a proportion of overall need) which might be associated with the Project does not exceed the amount of affordable housing need which authorities expect to be delivered under policies in adopted or emerging plans.

Pipeline supply

7.4.22 To assess the mix coming forward in pipeline supply an assessment of the mix of housing being provided on large-scale strategic sites, where these have reached reserved matters stage (and therefore a mix has been indicated) or have an indicative masterplan or DPD has been reviewed.

North West Sussex

7.4.23 This includes the following sites within the recently adopted plans in the North West Sussex HMA:

- Forge Wood, Crawley – up to 1,900 units, 38% affordable
- North of Horsham, Horsham – up to 2,750 units, 30% affordable;
- Kilnwood Vale/West of Southwater, Horsham – up to 2,500 units, 24% affordable;
- Burgess Hill/Northern Arc, Mid Sussex – up to 3,040 units, 30% affordable;
- Clayton Mills, Mid Sussex – 500 units, 30% affordable;
- Freeks Farm, Mid Sussex – 460 units, 30% affordable;
- Land East of Brighton Road, Pease Pottage, Mid Sussex – 600 units, 30% affordable; and

- West of Copthorne, Mid Sussex – 500 units, 30% affordable.

7.4.24 Strategic sites in North West Sussex are therefore making provision for affordable housing in excess of the amount within the existing stock or recent delivery, and indeed the potential Project needs. Sites are typically close to or at the current policy requirements for affordable housing in the respective area (some may be lower if approved before the current local plan was adopted, or due to viability or other reasons).

Reigate & Banstead

7.4.25 Within Reigate & Banstead the key strategic site in the Core Strategy is Horley North West, allocated for 1,510 homes, of which 25% affordable. This is lower than the Core Strategy requirement, however is still above recent delivery, existing stock and the potential needs associated with the Project.

Tandridge

7.4.26 Tandridge is heavily constrained by Green Belt and its emerging plan and associated strategic allocations is not sufficiently advanced to provide a housing mix. It therefore has limited supply of large-scale strategic sites for analysis. The largest pipeline sites in Tandridge for which a mix is currently available include:

- Former Oxted Gasholder site, Tandridge – 111 units, 0% affordable; and
- Gadoline House, Tandridge – 118 units, 14% affordable.

7.4.27 These are low relative to the Core Strategy requirement, recent delivery, current affordable housing stock of potential needs associated with the Project. However, as a heavily Green Belt constrained authority (with a current local plan adopted in 2008) it would be reasonable to expect that, upon adoption of its emerging local plan, there will be a step change in housing delivery in Tandridge, with affordable housing delivery in the future in line with its policy requirements for 20-40% affordable housing.

Mole Valley

7.4.28 Similar to Tandridge, Mole Valley is heavily constrained by Green Belt and its emerging plan and associated strategic allocations is not sufficiently advanced to provide a housing mix. It therefore has limited supply of large-scale strategic sites for analysis. The largest pipeline site in Mole Valley is Randalls Way, Leatherhead, Mole Valley – 214 units, of which 17% affordable.

7.4.29 Again, as with Tandridge, this is relatively low. However, as a heavily Green Belt constrained authority (with a current local plan adopted in 2009) it would be reasonable to expect that, upon adoption of its emerging local plan, there will be a step change in housing delivery, with affordable housing delivery in the future in line with its policy requirements for 30-40% affordable housing.

7.5 Summary

7.5.1 This section has given consideration to whether operational employment associated with the Project might have implications for the demands for different tenures of housing, particularly in those areas immediately adjacent to Gatwick. This has shown that, based on current occupancy patterns by socio-economic group, the Project is expected to generate slightly demand for more affordable rented housing (14-17%) compared with the proportion of affordable housing within the existing stock. However:

- A review of recent delivery suggests that affordable housing delivery is currently above the amount within the existing stock and the potential needs associated with the Project (at 21% of all housing in the last 3-4 years);
- A review of evidence published by the local authorities shows that, even without accounting for the Project, affordable housing needs in the area are well above existing stock levels and the potential needs associated with the Project (in some cases representing over half of overall need);
- A review of policies in current and emerging plans shows that future affordable housing delivery is likely to be in excess of existing stock levels and recent delivery (with policies typically requiring 30-40% affordable housing); and
- A review of schemes in the pipeline shows that in North West Sussex schemes are typically at or just below affordable housing policy requirements. In Tandridge and Mole Valley details on the mix of emerging schemes is limited however it can be reasonably assumed that emerging plans will create a step change in housing and affordable housing delivery, in line with emerging plan requirements (which are well above existing stock or potential Project needs).

7.5.2 On the above basis, it can be concluded that the potential tenure demands associated with the Project (which are likely to be slightly skewed more towards affordable housing than the existing employment base) are unlikely to have any impact on affordable housing demands beyond what is already emerging or being planned for. Authorities recognise that future affordable housing needs are well above the level of affordable housing in the existing stock, and policies (adopted and emerging) along with emerging large scale schemes are broadly planning for this. The amount of affordable housing need associated with the Project is unlikely to place any further upward pressure on affordable housing delivery beyond pressures that already exist.

7.5.3 In any event, and as noted earlier in this section, operational employment associated with the Project is not expected to commence until 2029 and peak until 2038. Evidence of recent delivery, current policies and the short-medium term pipeline suggests that trends in affordable housing delivery are already aligned towards what might be required; however, by the time the Project is operational, authorities will have had time to consider what impact the Project will have, if any, on the policies for housing mix in their area. This may result in future policies and/or schemes which seek to respond to any needs, if any, associated with the Project.

8 Summary and conclusions

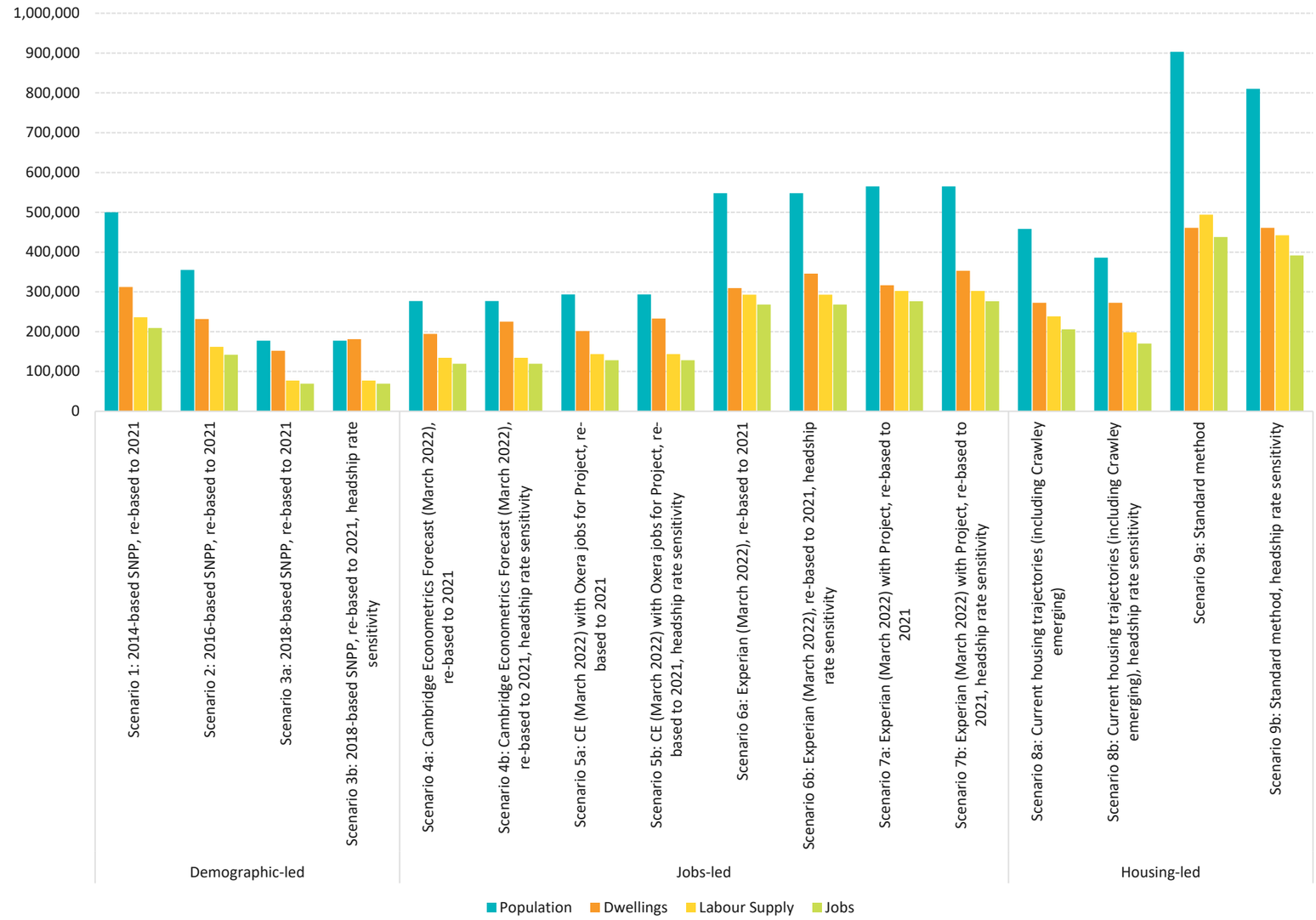
8.1 Summary

Overall housing need

8.1.1 This report has been prepared by Lichfields on behalf of GAL with input from Cambridge Econometrics, Experian, Oxera and Quod which have provided economic forecasts/estimates of different types. This report provides the background analysis to demonstrate that the operational phase of the Project would not have significant effects on population levels and housing. It should not be used for the purposes of assessing local housing needs or requirements as it does not examine all relevant factors and has been prepared based on third party data which may be subject to change as part of future plan making.

8.1.2 Several future scenarios covering the study area have been examined, led either by population trends, job forecasts or housing numbers, the outputs for which are shown in Diagram 6.1.1. Bars of the same colour show growth in a given indicator (e.g. **blue** for population) under the various scenarios.

Diagram 8.1.1: Summary of population, dwelling, labour supply and job outputs - all scenarios (study area total, 2021-47 total change)



Source: Lichfields

8.1.3 The two scenarios considered most useful for answering the question at the heart of this report – i.e. is it likely that growth generated by the Project would have a significant impact on population/housing - are:

- Scenario 5a: the number of jobs forecast in Cambridge Econometrics' most recent economic forecast (March 2021) with the additional workers arising in the operational phase of the Project, and how much housing would be needed to support this; and
- Scenario 8a: the amount of housing which is likely to come forward based on current housing trajectories (and the amount of population and labour supply this would generate), and how many jobs this might support.

8.1.4 In headline terms, current local plans provide for sufficient labour supply across the study area to meet CE estimates of future job growth and with sufficient 'surplus' to match the additional labour demand (direct, indirect, induced and catalytic) generated by the Project (assuming all employment associated with the Project is net additional, which is a worst-case scenario). Because this assessment of the employment impact of the Project is likely to be an over-estimate and housing growth generated through new local plans coming through the system in the near future would almost certainly be higher, it is possible to conclude that there would be a sufficient surplus of labour in the study area to support employment growth associated with the Project.

8.1.5 Further analysis has been undertaken to assess whether there are likely to be any localised 'pinch points' (see headline outputs at Table 5.2.2). This shows that:

- The North West Sussex Housing Market Area (HMA) – the HMA in which Gatwick is located – is expected to generate a substantial and increasing labour surplus over time against demand in all of the key assessment years, with or without the Project (evidently, this surplus is slightly less where the Project is included);
- The Coastal West Sussex HMA is similarly expected to generate a labour surplus in all of the key assessment years, progressively increasing over time, with or without the Project;
- In the Wealden and Eastbourne HMA a shortfall is anticipated in 2024 (with or without the Project), prior to the Project's operational employment commencing. By the time the operational Project jobs commence in the key assessment year of 2029 this becomes a labour surplus which continues to increase over time. This surplus occurs with or without the Project;
- In the North East Surrey HMA, shortfalls in labour are anticipated in 2024, 2029, 2032 and 2038, however the Project is not the determinative factor. In other words, this HMA would be expected to have a shortfall of labour even without the Project; the inclusion of the Project slightly increases the shortfall. By 2047, this HMA is anticipated to have a labour surplus (with or without the Project); and
- In the Croydon and East Surrey HMA, a labour shortfall is expected in 2029 and 2032 (with or without the Project). In 2038 the inclusion of the Project creates a shortfall where there might otherwise be a surplus. However, this magnitude of change (-2,574) represents only 0.7% of the labour force in the HMA in 2038. This relatively small shortfall should also be seen in the context that:

  - If some jobs associated with the Project will displace or substitute jobs already in the underlying forecast, Scenario 5a represents a 'worst-case' scenario from a labour demand perspective;
  - The assessment applies a number of fixed assumptions around unemployment, economic activity and commuting. Any variation to these inputs which increases the availability of labour (e.g. reductions in unemployment, increases in economic activity, increases in in-commuting [or reductions in out-commuting]) will increase the labour supply in a given area without the need for additional housing;
  - The labour supply based on current housing trajectories represents a 'worst-case scenario' from a labour supply perspective because current plans across the area do not make provision for full housing need. Trajectories are extrapolated in the medium to longer term, and it is reasonable to assume that these plans will be revised in the future and provide a level of housing more in line with needs (which is far greater than recent delivery trends or housing in current trajectories);
  - By 2047 the assessment anticipates a labour surplus in the Croydon and East Surrey HMA with or without the Project; and
  - At the time this shortfall exists in the Croydon and East Surrey HMA (2038), an overall surplus of over 34,000 is expected across the study area as a whole, including a 15,000 surplus in the North West Sussex HMA (which is directly adjacent to the Croydon and East Surrey HMA).

8.1.6 For these reasons, the Project is not concluded to be likely to have any material impacts on housing demand (as a result of labour demand) in any HMA within the study area.

8.1.7 Analysis has also been undertaken comparing future growth if housing delivery increased in line with the standard method and employment growth were higher (as forecast by Experian). This suggests the labour supply generated by the standard method would still be in excess of the labour supply needed to support employment, with the Project, in every HMA in the study year in every key assessment year in which the Project has an operational employment impact (i.e. 2029 onwards).

8.1.8 If employment growth were lower (in line with CE) but housing delivery increased (in line with the standard method) there would be a surplus in labour supply in every HMA in every key assessment year.

Housing need during construction

8.1.9 Analysis undertaken by Quod for the purposes of the Project (ES Appendix 17.9.1) suggests the construction workforce will peak at c.1,400 workers in February 2027, of which it is estimated that up to 20% may be non-home based (NHB) and therefore require temporary accommodation, with the vast majority being located in Crawley and Reigate & Banstead. These workers will be accommodated in a number of ways, depending on their role (and therefore income available to spend on housing) and duration working on the Project.

8.1.10 This report has assessed the housing market's potential to absorb housing demand from temporary workers for the seven authorities where >1 NHB worker is expected to be accommodated; Crawley, Mid Sussex, Horsham (which make up the North West Sussex HMA), Reigate & Banstead, Mole Valley, Tandridge and Croydon. Collectively these account for 250 of the 270 NHB workers at the construction peak. This analysis primarily focuses on the private rented sector and its capacity to absorb this potential demand, but also other sources of housing supply for construction workers. It shows that the demand for temporary accommodation during the construction phase from NHB workers is unlikely to give rise to significant housing effects as the number of NHB workers (even at its peak) represents a very small proportion of the potential sources of supply which might meet this demand.

Housing type and tenure

8.1.11 This report also gives consideration to whether operational employment associated with the Project might have implications

for the demands for different tenures of housing (notably affordable housing), particularly in those areas immediately adjacent to Gatwick. Based on current occupancy patterns by socio-economic group, the Project is expected to generate demand for approximately 14-17% affordable rented housing.

8.1.12 A review of recent affordable housing delivery, current evidence of affordable need published by the Councils, policies in local plans and pipeline delivery of affordable housing on large-scale sites demonstrate that the operational demands associated with Project are unlikely to have any impact on affordable housing demands beyond what is already emerging or being planned for in the authorities in Gatwick's surrounding area. Authorities recognise that future affordable housing needs are well above the level of affordable housing in the existing stock, and policies (adopted and emerging) along with emerging large scale schemes are planning for this as far as possible (subject to viability and other factors). The amount of affordable housing need associated with the Project is unlikely to place any further upward pressure on affordable housing delivery in the future beyond pressures that already exist, acknowledged by the Councils, and can feed into current/emerging policies and underpin decision-making.

8.2 Conclusions

8.2.1 Based on the analysis within this report, it is concluded that the Project would not generate significant population or associated housing effects. The Project is expected to result in growth of jobs associated with Gatwick – amounting to c.9,500 (direct, indirect, induced and catalytic) in the study area by 2032 (note that the study area used in this report is slightly larger than the Labour Market Area and smaller than the Six Authorities Area referred to elsewhere in the ES), falling to c.8,700 in the long-term (2047).

8.2.2 It is not reasonably expected that additional housing demand arising during the operational phase of the Project would create pressure on the housing supply of any particular housing market area or the study area as a whole, and therefore that any authority would need to make specific provision for additional housing in response to the Project's job creation before 2047. Similarly, the Project is not expected to generate significant housing effects associated with temporary demand for housing during the construction phase, nor is the Project expected to generate housing effects insofar as the tenure of housing needed to support operational employment.

9 References

Ministry of Housing, Communities and Local Government (MHCLG) (2021) National Policy Planning Framework (NPPF) [Online] Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/779764/NPPF_Feb_2019_web.pdf

10 Glossary

10.1 Glossary of terms

Table 10.1.1: Glossary of Terms

Term	Description
ASMigR	Age Specific Migration Rates
CE	Cambridge Econometrics
DCLG	Department of Communities and Local Government
DLUHC	Department for Levelling Up, Housing and Communities (formerly MHCLG)
EIA	Environmental Impact Assessment
ES	Environmental Statement
GAL	Gatwick Airport Limited
HMA	Housing Market Area
MHCLG	Ministry for Housing, Communities and Local Government (formerly DCLG)
MYEs	Mid-Year Estimates
OBR	Office for Budget Responsibility
ONS	Office for National Statistics
PEIR	Preliminary Environmental Information Report
SMR	Standardised Mortality Ratio
SNHP	Sub-National Household Projections
SNPP	Sub-National Population Projections
TFR	Total Fertility Rate
UK	United Kingdom

Annex 1

Comparison between projected and actual 2021 population

	Adur	Arun	Brighton and Hove	Chichester	Crawley	Croydon	Eastbourne	Elmbridge	Epsom and Ewell	Horsham	Lewes	Mid Sussex	Mole Valley	Reigate and Banstead	Tandridge	Wealden	Worthing	Total
Projected (ONS 2018-based SNPP)	64,718	163,831	292,275	122,854	113,312	388,516	104,275	136,758	80,843	146,533	104,324	148,419	88,210	150,566	88,831	163,643	111,815	2,469,724
Actual – Census (2021)	64,500	164,800	277,500	124,500	118,200	390,500	101,800	138,600	80,900	146,600	99,800	152,100	87,500	151,000	87,900	160,100	111,300	2,457,600
Difference	-218	969	-14,775	1,646	4,888	1,984	-2,475	1,842	57	67	-4,524	3,681	-710	434	-931	-3,543	-515	-12,124
Difference (%)	-0.3%	0.6%	-5.1%	1.3%	4.3%	0.5%	-2.4%	1.3%	0.1%	0.0%	-4.3%	2.5%	-0.8%	0.3%	-1.0%	-2.2%	-0.5%	-0.5%

Annex 2

Model inputs and assumptions

	Demographic				Employment-led		Housing-led	
Input	**Scenario 1: 2014-based SNPP**	**Scenario 2: 2016-based SNPP**	**Scenario 3a: 2018-based SNPP**	**Scenario 3a: 2018-based SNPP, headship rate adjustment**	**Scenario 4: Cambridge Econometrics Forecast** **Scenario 5: Cambridge Econometrics Forecast with Project**	**Scenario 6: Experian Forecast** **Scenario 7: Experian Forecast with Project**	**Scenario 8: Current trajectories**	**Scenario 9: Standard method**
Demographic								
Base Population	ONS 2021 Census Population by five year age group and sex by local authority.							
Births	Total Fertility Rate (TFR) by local authority from ONS 2014-based SNPP applied. Beyond 2039 this is trended.	Total Fertility Rate (TFR) by local authority from ONS 2016-based SNPP applied. Beyond 2041 this is trended.	Total Fertility Rate (TFR) by local authority from ONS 2018-based SNPP applied. Beyond 2043 this is trended.					
Deaths	Standardised Mortality Ratio (SMR) by local authority from ONS 2014-based SNPP applied. Beyond 2039 this is trended.	Standardised Mortality Ratio (SMR) by local authority from ONS 2016-based SNPP applied. Beyond 2041 this is trended.	Standardised Mortality Ratio (SMR) by local authority from ONS 2018-based SNPP applied. Beyond 2043 this is trended.					
In-migration from UK	Age Specific Migration Rates (ASMigR – the proportion of people in a given age/sex group who migrate into a given local authority each year / total number in that group) and migration differentials (the degree to which ASMigRs change each year) by local authority from ONS 2014-based SNPP applied. Beyond 2039	ASMigRs and migration differentials by local authority from ONS 2016-based SNPP applied. Beyond 2041 this is trended. Reference population is the 2016-based National Population projections (UK) by sex and single year of age.	ASMigRs and migration differentials by local authority from ONS 2018-based SNPP applied. Reference population is the 2018-based National Population projections (UK) by sex and single year of age. Beyond 2043 this is trended.		ASMigRs and migration differentials by local authority from ONS 2018-based SNPP applied. Reference population is the 2018-based National Population projections (UK) by sex and single year of age. Number of migrants is constrained/inflated to achieve labour supply necessary to support job growth.		ASMigRs and migration differentials by local authority from ONS 2018-based SNPP applied. Reference population is the 2018-based National Population projections (UK) by sex and single year of age. Number of migrants is constrained/inflated based on dwelling growth.	

	Demographic				Employment-led		Housing-led	
Input	**Scenario 1: 2014-based SNPP**	**Scenario 2: 2016-based SNPP**	**Scenario 3a: 2018-based SNPP**	**Scenario 3a: 2018-based SNPP, headship rate adjustment**	**Scenario 4: Cambridge Econometrics Forecast** **Scenario 5: Cambridge Econometrics Forecast with Project**	**Scenario 6: Experian Forecast** **Scenario 7: Experian Forecast with Project**	**Scenario 8: Current trajectories**	**Scenario 9: Standard method**
	this is trended. Reference population (i.e. the population from which in-migrants are drawn) is the 2014-based National Population projections (UK) by sex and single year of age.							
Out-migration to the UK	ASMigRs and migration differentials by local authority from ONS 2014-based SNPP applied. Beyond 2039 this is trended.	ASMigRs and migration differentials by local authority from ONS 2016-based SNPP applied. Beyond 2041 this is trended.	ASMigRs and migration differentials by local authority from ONS 2018-based SNPP applied. Beyond 2043 this is trended.		ASMigRs and migration differentials by local authority from ONS 2018-based SNPP applied. Number of migrants is constrained/inflated to achieve labour supply necessary to support job growth.		ASMigRs and migration differentials by local authority from ONS 2018-based SNPP applied. Number of migrants is constrained/inflated based on dwelling growth.	
In-migration from overseas	Age/sex profile (by sex and single year of age) and total number of migrants by local authority from ONS 2014-based SNPP applied. Beyond 2039 this is trended.	Age/sex profile (by sex and single year of age) and total number of migrants by local authority from ONS 2016-based SNPP applied. Beyond 2041 this is trended.	Age/sex profile (by sex and single year of age) and total number of migrants by local authority from ONS 2018-based SNPP applied. Beyond 2043 this is trended.		Age/sex profile (by sex and single year of age) and total number of migrants by local authority from ONS 2018-based SNPP applied. Number of migrants is constrained/inflated to achieve labour supply necessary to support job growth.		Age/sex profile (by sex and single year of age) and total number of migrants by local authority from ONS 2018-based SNPP applied. Number of migrants is constrained/inflated based on dwelling growth.	
Out-migration to overseas	ASMigRs and migration differentials by local authority from ONS 2014-based SNPP applied. Beyond 2039 this is trended.	ASMigRs and migration differentials by local authority from ONS 2016-based SNPP applied. Beyond 2041 this is trended.	ASMigRs and migration differentials by local authority from ONS 2018-based SNPP applied. Beyond 2043 this is trended.		ASMigRs and migration differentials by local authority from ONS 2018-based SNPP applied. Number of migrants is constrained/inflated to achieve labour supply necessary to support job growth.		ASMigRs and migration differentials by local authority from ONS 2018-based SNPP applied. Number of migrants is constrained/inflated based on dwelling growth.	
Housing								
Household Formation Rates	Stage 1 household formation rates (i.e. by sex and 5 year age group) from 2014-based	Stage 1 household formation rates (i.e. by sex and 5 year age group) from 2016-	Stage 1 household formation rates (i.e. by sex and 5 year age group) from 2018-	Stage 1 household formation rates (i.e. by sex and 5 year age group) from 2018-based	For all Scenario A Stage 1 household formation rates or relevant sensitivity from 2018-based household projections by local authority applied. For all Scenario B Stage 1 household formation rates (i.e. by sex and 5 year age group) from 2018-based household projections by local authority applied. If the rates for 16-19, 20-24, 25-29 and 30-34			

	Demographic				Employment-led		Housing-led	
Input	**Scenario 1: 2014-based SNPP**	**Scenario 2: 2016-based SNPP**	**Scenario 3a: 2018-based SNPP**	**Scenario 3a: 2018-based SNPP, headship rate adjustment**	**Scenario 4: Cambridge Econometrics Forecast Scenario 5: Cambridge Econometrics Forecast with Project**	**Scenario 6: Experian Forecast Scenario 7: Experian Forecast with Project**	**Scenario 8: Current trajectories**	**Scenario 9: Standard method**
	household projections by local authority applied. Beyond 2039 this is trended.	based household projections by local authority applied. Beyond 2041 this is trended.	based household projections by local authority applied. Beyond 2043 this is trended.	household projections by local authority applied. If the rates for 16-19, 20-24, 25-29 and 30-34 year olds in a given authority are projected to fall below the 2001 level by 2030, rates are adjusted so they return to the 2001 level by 2030. Rates held constant thereafter.	year olds in a given authority are projected to fall below the 2001 level by 2030, rates are adjusted so they return to the 2001 level by 2030. Rates held constant thereafter			
Communal Establishment Population	Communal establishment population by sex and 5 year age group from 2014-based household projections by local authority applied. Below age 75 absolute figures are used, above age 75 rates are used (reflecting official methodology). Beyond 2039 this is trended.	Communal establishment population by sex and 5 year age group from 2016-based household projections by local authority applied. Below age 75 absolute figures are used, above age 75 rates are used (reflecting official methodology). Beyond 2041 this is trended.	Communal establishment population by sex and 5 year age group from 2018-based household projections by local authority applied. Below age 75 absolute figures are used, above age 75 rates are used (reflecting official methodology). Beyond 2043 this is trended.					
Vacancy	Vacancy rate calculated for each authority using Census 2011 (KS401EW) using household spaces with no usual residents / all household spaces							
Employment								
Economic Activity Rates	Starting point is the 2011 Census economic activity rates by age and sex (DC6107EW) by local authority. Rates are projected forward using the annual rates of change by age and sex from the Office for Budget Responsibility (OBR) labour market participation rates projections published in January 2017. Between 2021 and 2047 the OBR projects economic activity rates to be broadly stable for males under age 60, rates for males over age 60 (particularly the 65-69 age group) to increase. For women, rates are expected to be broadly stable for those under age 40, with progressively greater increases with age (again, with females age 65-69 seeing the greatest increase). These forecasts reflect a variety of factors, notably changes to State Pension Age which the OBR anticipates to affect economic activity amongst those in the 60-70 age groups.							

	Demographic				Employment-led		Housing-led	
Input	**Scenario 1: 2014-based SNPP**	**Scenario 2: 2016-based SNPP**	**Scenario 3a: 2018-based SNPP**	**Scenario 3a: 2018-based SNPP, headship rate adjustment**	**Scenario 4: Cambridge Econometrics Forecast Scenario 5: Cambridge Econometrics Forecast with Project**	**Scenario 6: Experian Forecast Scenario 7: Experian Forecast with Project**	**Scenario 8: Current trajectories**	**Scenario 9: Standard method**
Unemployment	ONS model-based estimates of unemployment for the year July to June 2021. Rates held at this level to 2047.							
Labour Force Ratio	Residents in employment as of 2021 calculated using ONS 2021 Census population with 2021 projected economic activity rates applied, less those unemployed (based on ONS model-based estimates of unemployment for year to June 2021). The number of employed residents in each local authority / number of jobs (from respective job forecast) gives the labour force ratio. Rates held at the 2021 level to 2047.							

Annex 3

Housing trajectory data

Table A3.1 Source of Housing Trajectory data

	Source of trajectory	Source
Adur	AMR (MAY 2022)	https://www.adur-worthing.gov.uk/media/Media,167523,smxx.pdf
Arun	AMR (JAN 2022)	https://www.arun.gov.uk/download.cfm?doc=docm93jijm4n18301.pdf&ver=19745
Brighton and Hove	AMR (2022) & SHLAA (2021)	https://www.brighton-hove.gov.uk/planning/planning-policy/authority-monitoring-report-2020-2021-residential-development / https://www.brighton-hove.gov.uk/planning/planning-policy/strategic-housing-land-availability-assessment-shlaa-2022#6-2020-shlaa-update-data-tables
Chichester	AMR (MARCH 2022) & 5YHLS (2021)	https://www.chichester.gov.uk/article/29753/Local-plan-monitoring / https://www.chichester.gov.uk/media/36392/5YHLS-Position-Statement---Chichester-Five-Year-Land-Supply-as-of-1st-April-21/pdf/5YHLS_Position_Statement_-_Chichester_Five_Year_Land_Supply_as_of_1st_April_21.pdf
Crawley	AMR (AUG 2021)	https://crawley.gov.uk/sites/default/files/2021-08/Crawley%20Borough%20Local%20Plan%20Authority%20Monitoring%20Report%202019-20.pdf
Croydon	AMR (FEB 2022) & Housing Trajectory (2019)	https://www.croydon.gov.uk/planning-and-regeneration/planning-policy/planning-evidence-and-information/monitoring-reports
Eastbourne	AMR/5YHLS (DEC 2021)	https://www.lewes-eastbourne.gov.uk/_resources/assets/inline/full/0/316712.pdf
Elmbridge	AMR/5YHLS (NOV 2021) [Figure 6]	https://www.elmbridge.gov.uk/planning/local-plan/strategic-planning/monitoring-reports-action-plans-and-article-4-directions/
Epsom and Ewell	AMR (2021 & 2020)	https://www.epsom-ewell.gov.uk/residents/planning/planning-policy/monitoring/authority-monitoring-report
Horsham	AMR (2021)	https://www.horsham.gov.uk/__data/assets/pdf_file/0017/109232/AMR_2020_2021_CHAPTER_3_Housing.pdf
Lewes	5YHLS (MAY 2021)	https://www.lewes-eastbourne.gov.uk/planning-policy/strategic-housing-and-economic-land-availability-assessment/housing-land-supply/?p=1
Mid Sussex	AMR (APRIL 2022) & 5YHLS (2021)	https://www.midsussex.gov.uk/planning-building/consultation-monitoring/
Mole Valley	5YHLS (JAN 2022 UPDATE)	https://www.molevalley.gov.uk/sites/default/files/home/building-planning/local-plans/five-year-housing-land-supply-2021-2026-january-2022-update.pdf
Reigate and Banstead	HOUSING MONITOR (2021)	https://www.reigate-banstead.gov.uk/info/20088/planning_policy/1102/plan_monitoring/3
Tandridge	AMR/5YHLS (2021)	https://www.tandridge.gov.uk/Portals/0/Documents/Planning%20and%20building/Planning%20strategies%20and%20policies/Current%20and%20adopted%20planning%20policies/Monitoring%20and%20land%20supply/Authoritys-Monitoring-Report-20-21.pdf?ver=2021-07-16-131817-747
Wealden	AMR (DEC 2021) & 5YHLS (2021)	https://www.wealden.gov.uk/planning-and-building-control/planning-policy/authority-monitoring-report/
Worthing	AMR (2020)	https://www.adur-worthing.gov.uk/media/Media,158914,smxx.pdf
South Downs National Park Authority	AMR (DEC 2021)	https://www.southdowns.gov.uk/wp-content/uploads/2021/12/Authority-Monitoring-Report-2020-to-2021.pdf

Notes: Does not include trajectories in emerging plans (e.g. currently at Reg 18/19 stage or undergoing examination), with the exception of Crawley. After the trajectory ends an average figure to 2047 is trended. Some authorities only have a five-year land supply, in which case most of the trajectory is estimated using the average for 2020-25 or 2021-26. Where a total figure only is given this is averaged.

Table A3.2: Current housing trajectories (includes housing in South Downs National Park)

Year ending	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047
Adur	207	97	578	598	458	422	424	170	175	129	20	*298*	*298*	*298*	*298*	*298*	*298*	*298*	*298*	*298*	*298*	*298*	*298*	*298*	*298*	*298*
Arun	550	1,293	1,252	1,064	1,279	1,590	1,656	1,609	1,552	1,423	*1,327*	*1,327*	*1,327*	*1,327*	*1,327*	*1,327*	*1,327*	*1,327*	*1,327*	*1,327*	*1,327*	*1,327*	*1,327*	*1,327*	*1,327*	*1,327*
Brighton & Hove	636	1,498	1,350	818	785	1,153	1,152	1,152	1,152	467	439	438	438	438	438	*824*	*824*	*824*	*824*	*824*	*824*	*824*	*824*	*824*	*824*	*824*
Chichester	806	690	755	777	560	753	639	524	490	490	490	490	458	296	246	*559*	*559*	*559*	*559*	*559*	*559*	*559*	*559*	*559*	*559*	*559*
Crawley	284	368	420	260	637	953	533	466	365	152	85	70	55	55	55	55	*220*	*220*	*220*	*220*	*220*	*220*	*220*	*220*	*220*	*220*
Croydon	2,640	2,640	2,640	929	929	929	929	929	929	929	929	929	929	929	929	*1,271*	*1,271*	*1,271*	*1,271*	*1,271*	*1,271*	*1,271*	*1,271*	*1,271*	*1,271*	*1,271*
Eastbourne	250	256	278	347	346	*295*	*295*	*295*	*295*	*295*	*295*	*295*	*295*	*295*	*295*	*295*	*295*	*295*	*295*	*295*	*295*	*295*	*295*	*295*	*295*	*295*
Elmbridge	752	751	751	751	751	330	330	330	330	329	470	470	470	468	468	100	*491*	*491*	*491*	*491*	*491*	*491*	*491*	*491*	*491*	*491*
Epsom and Ewell	222	173	118	153	170	170	170	170	170	144	144	144	144	144	61	61	*147*	*147*	*147*	*147*	*147*	*147*	*147*	*147*	*147*	*147*
Horsham	691	647	932	833	676	861	707	661	597	548	*715*	*715*	*715*	*715*	*715*	*715*	*715*	*715*	*715*	*715*	*715*	*715*	*715*	*715*	*715*	*715*
Lewes	418	428	428	428	428	*428*	*428*	*428*	*428*	*428*	*428*	*428*	*428*	*428*	*428*	*428*	*428*	*428*	*428*	*428*	*428*	*428*	*428*	*428*	*428*	*428*
Mid Sussex	1,293	1,310	913	638	*1,039*	*1,039*	*1,039*	*1,039*	*1,039*	*1,039*	*1,039*	*1,039*	*1,039*	*1,039*	*1,039*	*1,039*	*1,039*	*1,039*	*1,039*	*1,039*	*1,039*	*1,039*	*1,039*	*1,039*	*1,039*	*1,039*
Mole Valley	317	317	317	317	317	*317*	*317*	*317*	*317*	*317*	*317*	*317*	*317*	*317*	*317*	*317*	*317*	*317*	*317*	*317*	*317*	*317*	*317*	*317*	*317*	*317*
Reigate & Bans.	583	583	583	583	583	*583*	*583*	*583*	*583*	*583*	*583*	*583*	*583*	*583*	*583*	*583*	*583*	*583*	*583*	*583*	*583*	*583*	*583*	*583*	*583*	*583*
Tandridge	584	442	319	83	83	*302*	*302*	*302*	*302*	*302*	*302*	*302*	*302*	*302*	*302*	*302*	*302*	*302*	*302*	*302*	*302*	*302*	*302*	*302*	*302*	*302*
Wealden	1,126	1,128	1,128	1,128	1,128	*1,128*	*1,128*	*1,128*	*1,128*	*1,128*	*1,128*	*1,128*	*1,128*	*1,128*	*1,128*	*1,128*	*1,128*	*1,128*	*1,128*	*1,128*	*1,128*	*1,128*	*1,128*	*1,128*	*1,128*	*1,128*
Worthing	328	803	414	505	345	*479*	*479*	*479*	*479*	*479*	*479*	*479*	*479*	*479*	*479*	*479*	*479*	*479*	*479*	*479*	*479*	*479*	*479*	*479*	*479*	*479*
Total	**11,686**	**13,423**	**13,175**	**10,211**	**10,512**	**11,731**	**11,110**	**10,581**	**10,330**	**9,181**	**9,190**	**9,452**	**9,405**	**9,241**	**9,107**	**9,780**	**10,422**	**10,422**	**10,422**	**10,422**	**10,422**	**10,422**	**10,422**	**10,422**	**10,422**	**10,422**

Notes: Figures shown in *italics* are trended based on the average seen from 2020/21 to the end of the available trajectory. Figures for Crawley post-2037 take into account emerging Local Plan trajectory within the average. Figures may not sum due to rounding. Figures may not precisely match PopGroup outputs on an annual basis due to rounding and model functionality. Figures for Arun, Chichester, Horsham, Lewes and Wealden include housing within the South Downs National Park, set out below in Table A3.3.

Table A3.3: Housing in South Downs National Park, by local authority area

Location	Supply in Years 1-5 (2017/18 to 2021/22)	Supply in Years 6-16 (2022/23 to 2032/33)
Arun	0	56
Chichester	558	380
Horsham	16	28
Lewes	258	685
Wealden	0	15
Total	832	1,164

Source: South Downs National Park Authority Annual Monitoring Report 2021. Based on locality. Figures are annualised for each five year period and added into the relevant local authority in Table A3.2 above. Post-2033 figur

Annex 4

Headline outputs for all scenarios by local authority

Table A4.1: Headline outputs - Scenario 1: 2014-based SNPP, re-based to 2021

	Population		Dwellings		Labour supply		Jobs	
	2021	**2047**	**2021**	**2047**	**2021**	**2047**	**2021**	**2047**
Adur	64,500	78,227	29,591	37,975	33,630	40,231	26,400	31,582
Arun	164,800	199,151	79,127	101,017	82,070	94,483	53,700	61,822
Brighton and Hove	277,500	335,187	131,728	166,099	159,658	191,293	164,900	197,574
Chichester	124,500	138,826	60,730	72,561	64,396	70,179	76,200	83,043
Crawley	118,200	140,577	48,979	62,716	67,640	78,586	100,400	116,648
Croydon	390,500	489,914	168,619	227,166	214,148	260,728	148,600	180,922
Eastbourne	101,800	126,132	50,070	66,202	50,431	59,364	47,000	55,325
Elmbridge	138,600	156,714	59,618	71,344	73,952	81,352	68,900	75,794
Epsom & Ewell	80,900	102,352	33,142	43,871	44,281	55,758	36,600	46,086
Horsham	146,600	160,512	65,035	76,900	79,798	84,743	68,600	72,851
Lewes	99,800	127,086	45,863	61,073	50,575	64,595	47,500	60,667
Mid Sussex	152,100	177,102	65,314	82,050	84,120	96,791	70,100	80,659
Mole Valley	87,500	100,813	39,079	47,454	47,349	53,689	53,000	60,097
Reigate and Banstead	151,000	189,212	63,107	84,908	84,111	103,694	76,200	93,941
Tandridge	87,900	106,329	37,160	49,674	47,797	58,466	38,300	46,849
Wealden	160,100	194,313	71,988	93,531	83,161	100,078	62,400	75,094
Worthing	111,300	135,291	53,547	70,525	59,266	68,289	59,100	68,098
Study Area	**2,457,600**	**2,957,738**	**1,102,697**	**1,415,066**	**1,326,384**	**1,562,320**	**1,197,900**	**1,407,054**

Source: Lichfields analysis using PopGroup

Table A4.2: Headline outputs - Scenario 2: 2016-based SNPP, re-based to 2021

	Population		Dwellings		Labour supply		Jobs	
	2021	2047	2021	2047	2021	2047	2021	2047
Adur	64,500	75,593	29,123	35,392	33,627	39,493	26,400	31,005
Arun	164,800	195,509	77,408	97,682	82,063	93,228	53,700	61,006
Brighton and Hove	277,500	324,235	128,415	152,535	159,598	185,071	164,900	191,219
Chichester	124,500	138,784	59,693	70,653	64,400	70,818	76,200	83,795
Crawley	118,200	126,102	47,597	54,509	67,639	70,514	100,400	104,668
Croydon	390,500	449,476	158,686	192,696	214,111	238,859	148,600	165,776
Eastbourne	101,800	123,542	48,979	63,898	50,416	58,087	47,000	54,151
Elmbridge	138,600	147,252	58,113	66,426	73,934	77,367	68,900	72,099
Epsom & Ewell	80,900	91,256	32,505	38,494	44,286	49,256	36,600	40,707
Horsham	146,600	158,761	63,481	75,146	79,787	84,435	68,600	72,596
Lewes	99,800	120,443	45,249	57,442	50,573	61,513	47,500	57,775
Mid Sussex	152,100	173,987	63,805	78,163	84,125	95,418	70,100	79,510
Mole Valley	87,500	94,407	38,585	44,265	47,348	50,201	53,000	56,194
Reigate and Banstead	151,000	170,105	61,501	74,310	84,132	92,997	76,200	84,230
Tandridge	87,900	99,887	36,693	45,286	47,797	54,695	38,300	43,828
Wealden	160,100	191,242	71,172	91,395	83,168	98,782	62,400	74,115
Worthing	111,300	132,299	52,055	66,318	59,271	67,356	59,100	67,161
Study Area	**2,457,600**	**2,812,880**	**1,073,060**	**1,304,610**	**1,326,274**	**1,488,089**	**1,197,900**	**1,339,835**

Source: Lichfields analysis using PopGroup. *Note: This scenario has a different number of dwellings to Scenario 1 for the Study Area at the base date because it uses different household projections (which convert the population in 2019 into households and subsequently dwellings).

Table A4.3: Headline outputs - Scenario 3a: 2018-based SNPP, re-based to 2021

	Population		Dwellings		Labour supply		Jobs	
	2021	2047	2021*	2047	2021	2047	2021	2047
Adur	64,500	68,799	29,121	32,557	33,632	35,953	26,400	28,222
Arun	164,800	190,347	77,385	96,088	82,075	92,449	53,700	60,488
Brighton and Hove	277,500	300,849	128,391	139,602	159,220	172,679	164,900	178,839
Chichester	124,500	137,027	59,682	70,412	64,389	69,092	76,200	81,766
Crawley	118,200	120,374	47,598	52,875	67,622	67,709	100,400	100,530
Croydon	390,500	405,911	158,558	177,681	214,238	217,089	148,600	150,577
Eastbourne	101,800	111,558	48,983	57,536	50,413	52,670	47,000	49,104
Elmbridge	138,600	139,209	58,112	63,550	73,930	73,461	68,900	68,463
Epsom & Ewell	80,900	81,948	32,492	34,964	44,320	44,035	36,600	36,365
Horsham	146,600	172,156	63,495	79,432	79,794	93,623	68,600	80,489
Lewes	99,800	113,547	45,250	54,528	50,573	57,942	47,500	54,421
Mid Sussex	152,100	141,801	63,830	64,820	84,115	77,004	70,100	64,174
Mole Valley	87,500	93,541	38,588	42,823	47,342	51,280	53,000	57,409
Reigate and Banstead	151,000	161,248	61,457	70,003	84,106	89,000	76,200	80,634
Tandridge	87,900	93,928	36,686	41,793	47,819	51,443	38,300	41,202
Wealden	160,100	178,890	71,184	84,823	83,160	93,139	62,400	69,888
Worthing	111,300	123,740	52,070	61,102	59,282	64,560	59,100	64,362
Study Area	**2,457,600**	**2,634,872**	**1,072,882**	**1,224,592**	**1,326,030**	**1,403,129**	**1,197,900**	**1,266,933**

Source: Lichfields analysis using PopGroup. *Note: This scenario has a different number of dwellings to Scenarios 1 and 2 for the Study Area at the base date because it uses different household projections (which convert the population in 2021 into households and subsequently dwellings).

Table A4.4: Headline outputs - Scenario 3b: 2018-based SNPP, re-based to 2021, headship rate adjustment

	Population		Dwellings		Labour supply		Jobs	
	2021	2047	2021	2047	2021	2047	2021	2047
Adur	64,500	68,799	29,216	33,310	33,632	35,953	26,400	28,222
Arun	164,800	190,347	77,621	97,790	82,075	92,449	53,700	60,488
Brighton and Hove	277,500	300,849	129,096	146,507	159,220	172,679	164,900	178,839
Chichester	124,500	137,027	59,782	71,156	64,389	69,092	76,200	81,766
Crawley	118,200	120,374	47,867	54,866	67,622	67,709	100,400	100,530
Croydon	390,500	405,911	160,051	187,458	214,238	217,089	148,600	150,577
Eastbourne	101,800	111,558	49,170	58,872	50,413	52,670	47,000	49,104
Elmbridge	138,600	139,209	58,307	64,767	73,930	73,461	68,900	68,463
Epsom & Ewell	80,900	81,948	32,603	35,737	44,320	44,035	36,600	36,365
Horsham	146,600	172,156	63,710	81,089	79,794	93,623	68,600	80,489
Lewes	99,800	113,547	45,364	55,490	50,573	57,942	47,500	54,421
Mid Sussex	152,100	141,801	64,035	65,904	84,115	77,004	70,100	64,174
Mole Valley	87,500	93,541	38,666	43,484	47,342	51,280	53,000	57,409
Reigate and Banstead	151,000	161,248	61,652	71,367	84,106	89,000	76,200	80,634
Tandridge	87,900	93,928	36,745	42,260	47,819	51,443	38,300	41,202
Wealden	160,100	178,890	71,332	85,889	83,160	93,139	62,400	69,888
Worthing	111,300	123,740	52,264	62,574	59,282	64,560	59,100	64,362
Study Area	**2,457,600**	**2,634,872**	**1,077,481**	**1,258,521**	**1,326,030**	**1,403,129**	**1,197,900**	**1,266,933**

Source: Lichfields analysis using PopGroup

Table A4.5: Headline outputs - Scenario 4a: Cambridge Econometrics (March 2022) forecast

	Population		Dwellings		Labour supply		Jobs	
	2021	2047	2021	2047	2021	2047	2021	2047
Adur	64,500	71,980	29,121	33,983	33,632	37,708	26,400	29,600
Arun	164,800	184,279	77,385	93,234	82,075	89,259	53,700	58,400
Brighton and Hove	277,500	315,364	128,391	145,892	159,220	181,911	164,900	188,400
Chichester	124,500	140,187	59,682	72,027	64,389	70,726	76,200	83,700
Crawley	118,200	124,022	47,598	54,364	67,622	69,912	100,400	103,800
Croydon	390,500	430,917	158,558	188,243	214,238	230,962	148,600	160,200
Eastbourne	101,800	115,990	48,983	59,723	50,413	54,918	47,000	51,200
Elmbridge	138,600	154,748	58,112	70,162	73,930	82,085	68,900	76,500
Epsom & Ewell	80,900	90,046	32,492	38,193	44,320	48,679	36,600	40,200
Horsham	146,600	160,112	63,495	74,263	79,794	86,657	68,600	74,500
Lewes	99,800	113,119	45,250	54,340	50,573	57,707	47,500	54,200
Mid Sussex	152,100	167,496	63,830	75,833	84,115	91,915	70,100	76,600
Mole Valley	87,500	93,526	38,588	42,823	47,342	51,272	53,000	57,400
Reigate and Banstead	151,000	170,049	61,457	73,661	84,106	94,150	76,200	85,300
Tandridge	87,900	95,924	36,686	42,678	47,819	52,564	38,300	42,100
Wealden	160,100	187,444	71,184	88,668	83,160	97,820	62,400	73,400
Worthing	111,300	119,136	52,070	58,945	59,282	61,990	59,100	61,800
Study Area	**2,457,600**	**2,734,339**	**1,072,882**	**1,267,034**	**1,326,030**	**1,460,234**	**1,197,900**	**1,317,300**

Source: Lichfields analysis using PopGroup

Table A4.6: Headline outputs - Scenario 4b: Cambridge Econometrics (March 2022) forecast with headship rate adjustment

	Population		Dwellings		Labour supply		Jobs	
	2021	2047	2021	2047	2021	2047	2021	2047
Adur	64,500	71,980	29,216	34,776	33,632	37,708	26,400	29,600
Arun	164,800	184,279	77,621	94,856	82,075	89,259	53,700	58,400
Brighton and Hove	277,500	315,364	129,096	153,254	159,220	181,911	164,900	188,400
Chichester	124,500	140,187	59,782	72,787	64,389	70,726	76,200	83,700
Crawley	118,200	124,022	47,867	56,428	67,622	69,912	100,400	103,800
Croydon	390,500	430,917	160,051	198,652	214,238	230,962	148,600	160,200
Eastbourne	101,800	115,990	49,170	61,124	50,413	54,918	47,000	51,200
Elmbridge	138,600	154,748	58,307	71,556	73,930	82,085	68,900	76,500
Epsom & Ewell	80,900	90,046	32,603	39,064	44,320	48,679	36,600	40,200
Horsham	146,600	160,112	63,710	75,766	79,794	86,657	68,600	74,500
Lewes	99,800	113,119	45,364	55,297	50,573	57,707	47,500	54,200
Mid Sussex	152,100	167,496	64,035	77,173	84,115	91,915	70,100	76,600
Mole Valley	87,500	93,526	38,666	43,483	47,342	51,272	53,000	57,400
Reigate and Banstead	151,000	170,049	61,652	75,119	84,106	94,150	76,200	85,300
Tandridge	87,900	95,924	36,745	43,155	47,819	52,564	38,300	42,100
Wealden	160,100	187,444	71,332	89,797	83,160	97,820	62,400	73,400
Worthing	111,300	119,136	52,264	60,350	59,282	61,990	59,100	61,800
Study Area	**2,457,600**	**2,734,339**	**1,077,481**	**1,302,637**	**1,326,030**	**1,460,234**	**1,197,900**	**1,317,300**

Source: Lichfields analysis using PopGroup

Table A4.7: Headline outputs - Scenario 5a: Cambridge Econometrics forecast with additional jobs from Project

	Population		Dwellings		Labour supply		Jobs	
	2021	2047	2021	2047	2021	2047	2021	2047
Adur	64,500	72,348	29,121	34,148	33,632	37,908	26,400	29,757
Arun	164,800	185,155	77,385	93,657	82,075	89,693	53,700	58,684
Brighton and Hove	277,500	317,201	128,391	146,752	159,220	183,001	164,900	189,529
Chichester	124,500	140,577	59,682	72,219	64,389	70,929	76,200	83,941
Crawley	118,200	126,062	47,598	55,220	67,622	71,075	100,400	105,527
Croydon	390,500	433,084	158,558	189,152	214,238	232,138	148,600	161,016
Eastbourne	101,800	116,497	48,983	59,974	50,413	55,167	47,000	51,432
Elmbridge	138,600	155,233	58,112	70,371	73,930	82,345	68,900	76,742
Epsom & Ewell	80,900	90,433	32,492	38,350	44,320	48,893	36,600	40,377
Horsham	146,600	161,576	63,495	74,906	79,794	87,467	68,600	75,196
Lewes	99,800	113,669	45,250	54,591	50,573	57,998	47,500	54,474
Mid Sussex	152,100	168,999	63,830	76,475	84,115	92,764	70,100	77,308
Mole Valley	87,500	94,008	38,588	43,032	47,342	51,539	53,000	57,699
Reigate and Banstead	151,000	171,562	61,457	74,292	84,106	94,999	76,200	86,070
Tandridge	87,900	96,603	36,686	42,968	47,819	52,942	38,300	42,403
Wealden	160,100	188,348	71,184	89,075	83,160	98,301	62,400	73,761
Worthing	111,300	119,657	52,070	59,193	59,282	62,270	59,100	62,079
Study Area	**2,457,600**	**2,751,010**	**1,072,882**	**1,274,374**	**1,326,030**	**1,469,431**	**1,197,900**	**1,325,994**

Source: Lichfields analysis using PopGroup

Table A4.8: Headline outputs - Scenario 5b: Cambridge Econometrics forecast with additional jobs from the Project, with headship rate adjustment

	Population		Dwellings		Labour supply		Jobs	
	2021	2047	2021	2047	2021	2047	2021	2047
Adur	64,500	72,348	29,216	34,944	33,632	37,908	26,400	29,757
Arun	164,800	185,155	77,621	95,287	82,075	89,693	53,700	58,684
Brighton and Hove	277,500	317,201	129,096	154,152	159,220	183,001	164,900	189,529
Chichester	124,500	140,577	59,782	72,981	64,389	70,929	76,200	83,941
Crawley	118,200	126,062	47,867	57,311	67,622	71,075	100,400	105,527
Croydon	390,500	433,084	160,051	199,608	214,238	232,138	148,600	161,016
Eastbourne	101,800	116,497	49,170	61,382	50,413	55,167	47,000	51,432
Elmbridge	138,600	155,233	58,307	71,768	73,930	82,345	68,900	76,742
Epsom & Ewell	80,900	90,433	32,603	39,225	44,320	48,893	36,600	40,377
Horsham	146,600	161,576	63,710	76,422	79,794	87,467	68,600	75,196
Lewes	99,800	113,669	45,364	55,553	50,573	57,998	47,500	54,474
Mid Sussex	152,100	168,999	64,035	77,826	84,115	92,764	70,100	77,308
Mole Valley	87,500	94,008	38,666	43,695	47,342	51,539	53,000	57,699
Reigate and Banstead	151,000	171,562	61,652	75,763	84,106	94,999	76,200	86,070
Tandridge	87,900	96,603	36,745	43,448	47,819	52,942	38,300	42,403
Wealden	160,100	188,348	71,332	90,209	83,160	98,301	62,400	73,761
Worthing	111,300	119,657	52,264	60,603	59,282	62,270	59,100	62,079
Study Area	**2,457,600**	**2,751,010**	**1,077,481**	**1,310,179**	**1,326,030**	**1,469,431**	**1,197,900**	**1,325,994**

Source: Lichfields analysis using PopGroup

Table A4.9: Headline outputs - Scenario 6a: Experian (March 2022) forecast

	Population		Dwellings		Labour supply		Jobs	
	2021	2047	2021	2047	2021	2047	2021	2047
Adur	64,500	77,097	29,121	36,207	33,632	40,633	24,600	29,721
Arun	164,800	188,175	77,385	95,037	82,075	91,464	54,400	60,623
Brighton and Hove	277,500	357,039	128,391	164,369	159,220	208,031	172,500	225,381
Chichester	124,500	152,011	59,682	77,557	64,389	77,353	77,400	92,984
Crawley	118,200	143,119	47,598	62,244	67,622	81,361	103,500	124,528
Croydon	390,500	489,743	158,558	211,674	214,238	264,339	135,500	167,188
Eastbourne	101,800	124,894	48,983	64,001	50,413	59,610	46,300	54,746
Elmbridge	138,600	166,797	58,112	75,091	73,930	88,973	71,100	85,567
Epsom & Ewell	80,900	104,427	32,492	43,760	44,320	57,058	34,300	44,158
Horsham	146,600	174,120	63,495	80,183	79,794	94,977	66,600	79,272
Lewes	99,800	115,615	45,250	55,432	50,573	59,149	43,800	51,228
Mid Sussex	152,100	171,938	63,830	77,674	84,115	94,638	69,000	77,632
Mole Valley	87,500	104,341	38,588	47,342	47,342	57,647	55,400	67,459
Reigate and Banstead	151,000	199,427	61,457	85,478	84,106	111,542	81,900	108,617
Tandridge	87,900	103,974	36,686	46,003	47,819	57,271	37,600	45,032
Wealden	160,100	187,433	71,184	88,646	83,160	97,898	61,700	72,634
Worthing	111,300	145,654	52,070	71,370	59,282	76,907	56,200	72,909
Study Area	**2,457,600**	**3,005,804**	**1,072,882**	**1,382,070**	**1,326,030**	**1,618,849**	**1,191,800**	**1,459,678**

Source: Lichfields analysis using PopGroup

Table A4.10: Headline outputs - Scenario 6b: Experian (March 2022) forecast, with headship rate adjustment

	Population		Dwellings		Labour supply		Jobs	
	2021	2047	2021	2047	2021	2047	2021	2047
Adur	64,500	77,097	29,216	37,079	33,632	40,633	24,600	29,721
Arun	164,800	188,175	77,621	96,727	82,075	91,464	54,400	60,623
Brighton and Hove	277,500	357,039	129,096	172,938	159,220	208,031	172,500	225,381
Chichester	124,500	152,011	59,782	78,427	64,389	77,353	77,400	92,984
Crawley	118,200	143,119	47,867	64,671	67,622	81,361	103,500	124,528
Croydon	390,500	489,743	160,051	223,841	214,238	264,339	135,500	167,188
Eastbourne	101,800	124,894	49,170	65,558	50,413	59,610	46,300	54,746
Elmbridge	138,600	166,797	58,307	76,654	73,930	88,973	71,100	85,567
Epsom & Ewell	80,900	104,427	32,603	44,823	44,320	57,058	34,300	44,158
Horsham	146,600	174,120	63,710	81,895	79,794	94,977	66,600	79,272
Lewes	99,800	115,615	45,364	56,426	50,573	59,149	43,800	51,228
Mid Sussex	152,100	171,938	64,035	79,077	84,115	94,638	69,000	77,632
Mole Valley	87,500	104,341	38,666	48,109	47,342	57,647	55,400	67,459
Reigate and Banstead	151,000	199,427	61,652	87,295	84,106	111,542	81,900	108,617
Tandridge	87,900	103,974	36,745	46,537	47,819	57,271	37,600	45,032
Wealden	160,100	187,433	71,332	89,782	83,160	97,898	61,700	72,634
Worthing	111,300	145,654	52,264	73,175	59,282	76,907	56,200	72,909
Study Area	**2,457,600**	**3,005,804**	**1,077,481**	**1,423,013**	**1,326,030**	**1,618,849**	**1,191,800**	**1,459,678**

Source: Lichfields analysis using PopGroup

Table A4.11: Headline outputs - Scenario 7a: Experian forecast with the Project

	Population		Dwellings		Labour supply		Jobs	
	2021	2047	2021	2047	2021	2047	2021	2047
Adur	64,500	77,491	29,121	36,383	33,632	40,847	24,600	29,878
Arun	164,800	189,036	77,385	95,453	82,075	91,893	54,400	60,908
Brighton and Hove	277,500	358,793	128,391	165,183	159,220	209,073	172,500	226,510
Chichester	124,500	152,392	59,682	77,744	64,389	77,553	77,400	93,224
Crawley	118,200	145,091	47,598	63,070	67,622	82,489	103,500	126,255
Croydon	390,500	492,107	158,558	212,662	214,238	265,629	135,500	168,003
Eastbourne	101,800	125,406	48,983	64,254	50,413	59,863	46,300	54,978
Elmbridge	138,600	167,265	58,112	75,291	73,930	89,224	71,100	85,808
Epsom & Ewell	80,900	104,839	32,492	43,925	44,320	57,287	34,300	44,335
Horsham	146,600	175,621	63,495	80,840	79,794	95,811	66,600	79,968
Lewes	99,800	116,210	45,250	55,704	50,573	59,466	43,800	51,502
Mid Sussex	152,100	173,459	63,830	78,325	84,115	95,501	69,000	78,340
Mole Valley	87,500	104,801	38,588	47,541	47,342	57,902	55,400	67,758
Reigate and Banstead	151,000	200,829	61,457	86,059	84,106	112,332	81,900	109,387
Tandridge	87,900	104,664	36,686	46,296	47,819	57,656	37,600	45,335
Wealden	160,100	188,345	71,184	89,056	83,160	98,385	61,700	72,996
Worthing	111,300	146,199	52,070	71,627	59,282	77,201	56,200	73,187
Study Area	**2,457,600**	**3,022,549**	**1,072,882**	**1,389,413**	**1,326,030**	**1,628,112**	**1,191,800**	**1,468,373**

Source: Lichfields analysis using PopGroup

Table A4.12: Headline outputs - Scenario 7b: Experian forecast with Project, with headship rate adjustment

	Population		Dwellings		Labour supply		Jobs	
	2021	2047	2021	2047	2021	2047	2021	2047
Adur	64,500	77,491	29,216	37,259	33,632	40,847	24,600	29,878
Arun	164,800	189,036	77,621	97,151	82,075	91,893	54,400	60,908
Brighton and Hove	277,500	358,793	129,096	173,789	159,220	209,073	172,500	226,510
Chichester	124,500	152,392	59,782	78,616	64,389	77,553	77,400	93,224
Crawley	118,200	145,091	47,867	65,522	67,622	82,489	103,500	126,255
Croydon	390,500	492,107	160,051	224,880	214,238	265,629	135,500	168,003
Eastbourne	101,800	125,406	49,170	65,817	50,413	59,863	46,300	54,978
Elmbridge	138,600	167,265	58,307	76,858	73,930	89,224	71,100	85,808
Epsom & Ewell	80,900	104,839	32,603	44,992	44,320	57,287	34,300	44,335
Horsham	146,600	175,621	63,710	82,565	79,794	95,811	66,600	79,968
Lewes	99,800	116,210	45,364	56,703	50,573	59,466	43,800	51,502
Mid Sussex	152,100	173,459	64,035	79,739	84,115	95,501	69,000	78,340
Mole Valley	87,500	104,801	38,666	48,311	47,342	57,902	55,400	67,758
Reigate and Banstead	151,000	200,829	61,652	87,887	84,106	112,332	81,900	109,387
Tandridge	87,900	104,664	36,745	46,834	47,819	57,656	37,600	45,335
Wealden	160,100	188,345	71,332	90,197	83,160	98,385	61,700	72,996
Worthing	111,300	146,199	52,264	73,438	59,282	77,201	56,200	73,187
Study Area	**2,457,600**	**3,022,549**	**1,077,481**	**1,430,559**	**1,326,030**	**1,628,112**	**1,191,800**	**1,468,373**

Source: Lichfields analysis using PopGroup

Table A4.13: Headline outputs - Scenario 8a: Current housing trajectories

	Population		Dwellings		Labour supply		Jobs	
	2021	2047	2021	2047	2021	2047	2021	2047
Adur	64,500	78,577	29,121	36,869	33,632	41,460	26,400	32,545
Arun	164,800	223,952	77,385	111,892	82,075	110,177	53,700	72,087
Brighton and Hove	277,500	323,746	128,391	149,804	159,220	186,997	164,900	193,667
Chichester	124,500	145,223	59,682	74,285	64,389	73,692	76,200	87,210
Crawley	118,200	124,402	47,598	54,611	67,622	70,142	100,400	104,142
Croydon	390,500	439,919	158,558	191,607	214,238	236,282	148,600	163,890
Eastbourne	101,800	109,878	48,983	56,663	50,413	51,894	47,000	48,380
Elmbridge	138,600	156,680	58,112	70,873	73,930	83,299	68,900	77,631
Epsom & Ewell	80,900	85,447	32,492	36,322	44,320	46,068	36,600	38,043
Horsham	146,600	178,727	63,495	82,082	79,794	97,640	68,600	83,943
Lewes	99,800	117,887	45,250	56,375	50,573	60,443	47,500	56,770
Mid Sussex	152,100	203,811	63,830	90,831	84,115	113,338	70,100	94,454
Mole Valley	87,500	103,085	38,588	46,825	47,342	56,865	53,000	63,662
Reigate and Banstead	151,000	177,583	61,457	76,609	84,106	98,608	76,200	89,339
Tandridge	87,900	100,618	36,686	44,543	47,819	55,342	38,300	44,325
Wealden	160,100	214,873	71,184	100,505	83,160	113,248	62,400	84,976
Worthing	111,300	131,092	52,070	64,524	59,282	68,729	59,100	68,519
Study Area	**2,457,600**	**2,915,500**	**1,072,882**	**1,345,221**	**1,326,030**	**1,564,224**	**1,197,900**	**1,403,583**

Source: Lichfields analysis using PopGroup

Table A4.14: Headline outputs - Scenario 8b: Current housing trajectories with headship rate adjustment

	Population		Dwellings		Labour supply		Jobs	
	2021	2047	2021	2047	2021	2047	2021	2047
Adur	64,500	76,879	29,216	36,964	33,632	40,531	26,400	31,816
Arun	164,800	220,126	77,621	112,128	82,075	108,225	53,700	70,809
Brighton and Hove	277,500	309,911	129,096	150,510	159,220	178,809	164,900	185,187
Chichester	124,500	143,806	59,782	74,385	64,389	72,942	76,200	86,322
Crawley	118,200	120,413	47,867	54,880	67,622	67,837	100,400	100,719
Croydon	390,500	419,571	160,051	193,100	214,238	225,124	148,600	156,150
Eastbourne	101,800	107,695	49,170	56,850	50,413	50,822	47,000	47,381
Elmbridge	138,600	153,929	58,307	71,068	73,930	81,799	68,900	76,233
Epsom & Ewell	80,900	83,808	32,603	36,433	44,320	45,156	36,600	37,290
Horsham	146,600	175,306	63,710	82,297	79,794	95,705	68,600	82,279
Lewes	99,800	115,970	45,364	56,489	50,573	59,415	47,500	55,805
Mid Sussex	152,100	200,301	64,035	91,036	84,115	111,313	70,100	92,766
Mole Valley	87,500	101,591	38,666	46,902	47,342	56,030	53,000	62,726
Reigate and Banstead	151,000	174,464	61,652	76,805	84,106	96,825	76,200	87,724
Tandridge	87,900	99,587	36,745	44,602	47,819	54,760	38,300	43,859
Wealden	160,100	212,182	71,332	100,653	83,160	111,779	62,400	83,874
Worthing	111,300	128,267	52,264	64,718	59,282	67,196	59,100	66,990
Study Area	**2,457,600**	**2,843,807**	**1,077,481**	**1,349,819**	**1,326,030**	**1,524,266**	**1,197,900**	**1,367,931**

Source: Lichfields analysis using PopGroup

Table A4.15: Headline outputs - Scenario 9a: Standard Method

	Population		Dwellings		Labour supply		Jobs	
	2021	2047	2021	2047	2021	2047	2021	2047
Adur	64,500	75,556	29,121	35,523	33,632	39,754	26,400	31,206
Arun	164,800	223,515	77,385	111,673	82,075	109,991	53,700	71,965
Brighton and Hove	277,500	410,841	128,391	188,912	159,220	240,864	164,900	249,456
Chichester	124,500	156,330	59,682	79,524	64,389	79,771	76,200	94,405
Crawley	118,200	154,740	47,598	67,033	67,622	88,146	100,400	130,873
Croydon	390,500	595,939	158,558	253,852	214,238	323,900	148,600	224,664
Eastbourne	101,800	133,587	48,983	68,172	50,413	64,086	47,000	59,747
Elmbridge	138,600	166,569	58,112	74,922	73,930	88,794	68,900	82,753
Epsom & Ewell	80,900	114,014	32,492	47,471	44,320	62,515	36,600	51,626
Horsham	146,600	192,905	63,495	88,132	79,794	105,856	68,600	91,006
Lewes	99,800	138,652	45,250	65,605	50,573	71,935	47,500	67,563
Mid Sussex	152,100	209,278	63,830	93,103	84,115	116,556	70,100	97,136
Mole Valley	87,500	111,765	38,588	50,484	47,342	61,908	53,000	69,307
Reigate and Banstead	151,000	181,059	61,457	78,017	84,106	100,638	76,200	91,179
Tandridge	87,900	121,996	36,686	53,379	47,819	67,699	38,300	54,222
Wealden	160,100	219,898	71,184	102,699	83,160	116,045	62,400	87,075
Worthing	111,300	154,203	52,070	75,326	59,282	81,661	59,100	81,410
Study Area	**2,457,600**	**3,360,848**	**1,072,882**	**1,533,827**	**1,326,030**	**1,820,120**	**1,197,900**	**1,635,592**

Source: Lichfields analysis using PopGroup

Table A4.16: Headline outputs - Scenario 9b: Standard Method with headship rate adjustment

	Population		Dwellings		Labour supply		Jobs	
	2021	2047	2021	2047	2021	2047	2021	2047
Adur	64,500	73,953	29,216	35,618	33,632	38,880	26,400	30,520
Arun	164,800	219,684	77,621	111,910	82,075	108,035	53,700	70,685
Brighton and Hove	277,500	392,079	129,096	189,617	159,220	229,659	164,900	237,851
Chichester	124,500	154,718	59,782	79,624	64,389	78,916	76,200	93,392
Crawley	118,200	149,441	47,867	67,302	67,622	85,067	100,400	126,302
Croydon	390,500	565,266	160,051	255,344	214,238	306,948	148,600	212,905
Eastbourne	101,800	130,646	49,170	68,359	50,413	62,621	47,000	58,381
Elmbridge	138,600	163,528	58,307	75,117	73,930	87,136	68,900	81,207
Epsom & Ewell	80,900	111,464	32,603	47,582	44,320	61,079	36,600	50,440
Horsham	146,600	189,059	63,710	88,347	79,794	103,675	68,600	89,131
Lewes	99,800	136,196	45,364	65,719	50,573	70,606	47,500	66,315
Mid Sussex	152,100	205,628	64,035	93,308	84,115	114,448	70,100	95,378
Mole Valley	87,500	110,083	38,666	50,561	47,342	60,963	53,000	68,250
Reigate and Banstead	151,000	177,843	61,652	78,212	84,106	98,799	76,200	89,513
Tandridge	87,900	120,620	36,745	53,438	47,819	66,916	38,300	53,595
Wealden	160,100	217,108	71,332	102,848	83,160	114,521	62,400	85,932
Worthing	111,300	150,668	52,264	75,520	59,282	79,727	59,100	79,482
Study Area	**2,457,600**	**3,267,985**	**1,077,481**	**1,538,426**	**1,326,030**	**1,767,995**	**1,197,900**	**1,589,278**

Source: Lichfields analysis using PopGroup

Annex 5

Cambridge Econometrics March 2022 Methodology Note

Annex 6

Experian March 2022 Methodology Note

Annex 7

Detailed outputs for labour supply analysis (Section 5.0) – Current Trajectories and Cambridge Econometrics

Scenario 5a: Cambridge Econometrics (March 2022) with the Project outputs

Table A7.1: Scenario 5a: Cambridge Econometrics with Project - Job forecast

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047
Adur	26,400	26,800	27,100	27,300	27,400	27,500	27,600	27,700	27,955	28,084	28,223	28,372	28,471	28,570	28,670	28,769	28,868	28,968	29,066	29,165	29,264	29,363	29,461	29,560	29,559	29,658	29,757
Arun	53,700	54,600	55,000	55,300	55,500	55,600	55,800	55,900	56,202	56,341	56,580	56,816	57,016	57,115	57,314	57,414	57,613	57,707	57,805	58,004	58,103	58,202	58,300	58,399	58,498	58,597	58,684
B'n & H	164,900	167,500	169,200	170,400	171,200	172,000	172,800	173,600	174,810	175,649	176,488	178,072	178,871	179,670	180,570	181,369	182,168	182,923	183,622	184,421	185,220	185,918	186,717	187,416	188,115	188,913	189,529
Chich.	76,200	77,400	78,000	78,400	78,600	78,900	79,100	79,400	79,687	80,026	80,265	80,669	80,869	81,168	81,367	81,567	81,866	82,060	82,259	82,558	82,757	82,955	83,154	83,353	83,552	83,750	83,941
Crawley	100,400	100,300	100,500	100,500	100,300	100,500	100,600	100,700	101,465	101,604	101,843	103,093	103,292	103,492	103,691	103,890	103,990	104,207	104,405	104,504	104,703	104,802	105,000	105,099	105,298	105,397	105,527
Croydon	148,600	150,100	151,300	151,900	152,400	152,800	153,200	153,500	154,191	154,630	155,069	156,006	156,405	156,805	157,204	157,603	157,903	158,279	158,578	158,976	159,275	159,574	159,873	160,171	160,470	160,769	161,016
E'bourne	47,000	47,700	48,000	48,300	48,500	48,600	48,800	48,900	49,084	49,323	49,462	49,660	49,759	49,959	50,058	50,157	50,257	50,451	50,550	50,648	50,747	50,846	50,945	51,043	51,242	51,341	51,432
Elmb.	68,900	69,900	70,600	71,000	71,300	71,600	71,900	72,100	72,487	72,726	73,065	73,370	73,669	73,969	74,168	74,467	74,667	74,861	75,160	75,359	75,558	75,756	75,955	76,154	76,353	76,551	76,742
Ep.& Ew.	36,600	37,000	37,400	37,600	37,800	37,900	38,000	38,100	38,364	38,502	38,641	38,797	38,996	39,096	39,195	39,294	39,394	39,491	39,590	39,689	39,787	39,886	39,985	40,084	40,182	40,281	40,377
Horsham	68,600	69,500	70,000	70,400	70,600	70,800	71,000	71,200	71,641	71,879	72,118	72,753	72,953	73,152	73,351	73,551	73,750	73,841	74,040	74,239	74,338	74,537	74,635	74,834	74,933	75,132	75,196
Lewes	47,500	48,200	48,700	49,000	49,300	49,500	49,800	50,000	50,298	50,637	50,876	51,206	51,505	51,704	51,904	52,203	52,402	52,596	52,794	53,093	53,292	53,491	53,690	53,888	54,087	54,286	54,474
Mid Sus.	70,100	71,000	71,500	71,900	72,100	72,300	72,500	72,700	73,243	73,482	73,720	74,362	74,561	74,760	74,960	75,259	75,458	75,652	75,851	76,050	76,248	76,347	76,546	76,745	76,943	77,142	77,308
Mole Val.	53,000	53,600	54,100	54,400	54,600	54,800	54,900	55,000	55,305	55,444	55,683	55,927	56,026	56,225	56,325	56,424	56,623	56,720	56,819	56,918	57,017	57,115	57,214	57,313	57,512	57,610	57,699
R. & Ban.	76,200	77,200	78,100	78,700	79,000	79,400	79,700	80,000	80,563	80,902	81,241	82,026	82,326	82,625	82,924	83,224	83,423	83,717	84,016	84,315	84,513	84,812	85,011	85,310	85,508	85,807	86,070
Tandr.	38,300	38,700	39,100	39,400	39,500	39,700	39,800	39,900	40,207	40,345	40,484	40,732	40,932	41,031	41,130	41,230	41,429	41,525	41,623	41,722	41,821	41,920	42,019	42,117	42,216	42,315	42,403
Wealden	62,400	63,500	64,300	64,900	65,300	65,700	66,100	66,500	67,029	67,468	67,807	68,402	68,801	69,201	69,600	69,999	70,399	70,789	71,088	71,487	71,786	72,185	72,483	72,782	73,181	73,480	73,761
Worthing	59,100	59,600	59,900	60,000	60,100	60,200	60,300	60,400	60,499	60,638	60,776	60,907	61,007	61,106	61,205	61,305	61,304	61,399	61,498	61,597	61,595	61,694	61,793	61,792	61,891	61,989	62,079
Study Area	**1,197,900**	**1,212,600**	**1,222,800**	**1,229,400**	**1,233,500**	**1,237,800**	**1,241,900**	**1,245,600**	**1,253,030**	**1,257,681**	**1,262,342**	**1,271,171**	**1,275,460**	**1,279,648**	**1,283,637**	**1,287,726**	**1,291,515**	**1,295,186**	**1,298,765**	**1,302,744**	**1,306,023**	**1,309,402**	**1,312,781**	**1,316,060**	**1,319,539**	**1,323,018**	**1,325,994**
FEMA	239,100	240,800	242,000	242,800	243,000	243,600	244,100	244,600	246,349	246,965	247,682	250,208	250,806	251,404	252,002	252,700	253,198	253,700	254,297	254,793	255,289	255,685	256,182	256,678	257,174	257,671	258,031
LMA	1,016,200	1,028,300	1,036,800	1,042,400	1,045,800	1,049,400	1,052,900	1,056,000	1,062,492	1,066,427	1,070,371	1,078,334	1,081,925	1,085,416	1,088,906	1,092,397	1,095,588	1,098,774	1,101,757	1,105,139	1,107,922	1,110,805	1,113,687	1,116,470	1,119,453	1,122,435	1,124,935

Source: Lichfields using PopGroup. *May not match CE forecast precisely due to rounding in modelling.

Table A7.2: Scenario 5a: Cambridge Econometrics with Project – Labour supply forecast

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047
Adur	33,632	34,141	34,523	34,778	34,906	35,033	35,160	35,288	35,613	35,777	35,954	36,143	36,270	36,396	36,523	36,649	36,776	36,903	37,028	37,154	37,280	37,406	37,532	37,657	37,656	37,782	37,908
Arun	82,075	83,451	84,062	84,521	84,826	84,979	85,285	85,438	85,899	86,111	86,476	86,838	87,143	87,295	87,599	87,751	88,056	88,199	88,350	88,654	88,805	88,955	89,106	89,257	89,408	89,559	89,693
B'n & H	159,220	161,731	163,372	164,531	165,304	166,076	166,848	167,621	168,790	169,600	170,410	171,939	172,710	173,482	174,351	175,122	175,894	176,623	177,298	178,069	178,840	179,515	180,286	180,961	181,636	182,407	183,001
Chich.	64,389	65,403	65,910	66,248	66,417	66,670	66,839	67,093	67,335	67,621	67,823	68,165	68,334	68,587	68,755	68,924	69,176	69,340	69,508	69,761	69,929	70,097	70,265	70,433	70,601	70,769	70,929
Crawley	67,622	67,555	67,689	67,689	67,555	67,689	67,757	67,824	68,340	68,433	68,594	69,436	69,570	69,704	69,839	69,973	70,040	70,186	70,320	70,386	70,520	70,587	70,721	70,787	70,921	70,987	71,075
Croydon	214,238	216,401	218,131	218,996	219,717	220,293	220,870	221,303	222,300	222,932	223,565	224,916	225,492	226,067	226,643	227,219	227,650	228,192	228,623	229,198	229,629	230,059	230,490	230,921	231,352	231,782	232,138
E'bourne	50,413	51,164	51,486	51,808	52,022	52,130	52,344	52,451	52,648	52,905	53,054	53,266	53,373	53,587	53,693	53,800	53,906	54,115	54,221	54,327	54,433	54,539	54,644	54,750	54,964	55,070	55,167
Elmb.	73,930	75,003	75,754	76,183	76,505	76,827	77,149	77,364	77,779	78,036	78,399	78,727	79,048	79,369	79,583	79,904	80,118	80,327	80,647	80,861	81,074	81,287	81,500	81,714	81,927	82,140	82,345
Ep. & Ew.	44,320	44,804	45,288	45,531	45,773	45,894	46,015	46,136	46,455	46,623	46,792	46,980	47,222	47,342	47,462	47,583	47,703	47,821	47,940	48,060	48,179	48,299	48,418	48,538	48,658	48,777	48,893
Horsham	79,794	80,841	81,422	81,888	82,120	82,353	82,586	82,818	83,331	83,609	83,886	84,625	84,857	85,089	85,321	85,552	85,784	85,891	86,122	86,353	86,468	86,699	86,814	87,045	87,160	87,391	87,467
Lewes	50,573	51,319	51,851	52,170	52,490	52,703	53,022	53,235	53,553	53,914	54,168	54,519	54,837	55,050	55,262	55,581	55,793	55,999	56,210	56,528	56,740	56,952	57,163	57,375	57,586	57,798	57,998
Mid Sus.	84,115	85,195	85,795	86,275	86,515	86,755	86,995	87,235	87,886	88,173	88,459	89,229	89,468	89,707	89,946	90,306	90,545	90,777	91,016	91,254	91,493	91,611	91,850	92,088	92,327	92,565	92,764
Mole Val.	47,342	47,878	48,324	48,592	48,771	48,950	49,039	49,128	49,401	49,525	49,738	49,956	50,045	50,223	50,312	50,400	50,578	50,665	50,753	50,841	50,930	51,018	51,106	51,194	51,372	51,460	51,539
R. & Ban.	84,106	85,209	86,203	86,865	87,196	87,638	87,969	88,300	88,922	89,296	89,670	90,536	90,867	91,197	91,528	91,858	92,078	92,403	92,732	93,062	93,281	93,611	93,831	94,160	94,380	94,710	94,999
Tandr.	47,819	48,319	48,818	49,193	49,318	49,567	49,692	49,817	50,200	50,373	50,546	50,856	51,105	51,229	51,353	51,477	51,726	51,845	51,969	52,092	52,215	52,339	52,462	52,585	52,709	52,832	52,942
Wealden	83,160	84,626	85,692	86,492	87,025	87,558	88,091	88,624	89,330	89,915	90,366	91,159	91,691	92,224	92,756	93,288	93,820	94,341	94,739	95,270	95,669	96,200	96,598	96,996	97,528	97,926	98,301
Worthing	59,282	59,783	60,084	60,185	60,285	60,385	60,486	60,586	60,685	60,824	60,963	61,095	61,194	61,294	61,394	61,493	61,493	61,588	61,687	61,786	61,785	61,884	61,983	61,982	62,081	62,180	62,270
Study Area	**1,326,030**	**1,342,822**	**1,354,407**	**1,361,944**	**1,366,743**	**1,371,500**	**1,376,147**	**1,380,260**	**1,388,464**	**1,393,665**	**1,398,864**	**1,408,385**	**1,413,226**	**1,417,842**	**1,422,319**	**1,426,880**	**1,431,137**	**1,435,214**	**1,439,164**	**1,443,657**	**1,447,269**	**1,451,058**	**1,454,770**	**1,458,445**	**1,462,264**	**1,466,135**	**1,469,431**
FEMA	231,531	233,591	234,907	235,852	236,190	236,797	237,337	237,877	239,556	240,214	240,940	243,290	243,895	244,500	245,106	245,831	246,369	246,854	247,458	247,994	248,481	248,897	249,384	249,921	250,408	250,944	251,306
LMA	1,143,392	1,157,612	1,167,454	1,173,982	1,178,049	1,182,109	1,186,144	1,189,668	1,196,894	1,201,385	1,205,850	1,214,513	1,218,622	1,222,544	1,226,518	1,230,470	1,234,140	1,237,726	1,241,068	1,244,976	1,248,087	1,251,375	1,254,587	1,257,761	1,261,078	1,264,449	1,267,264

Source: Lichfields using PopGroup.

Table A7.3: Scenario 5a: Cambridge Econometrics with Project - Population forecast

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047
Adur	64,500	65,357	66,019	66,375	66,531	66,663	66,792	66,920	67,399	67,670	68,001	68,407	68,723	69,012	69,333	69,702	70,088	70,332	70,577	70,769	70,961	71,166	71,391	71,642	71,686	71,992	72,348
Arun	164,800	167,553	169,031	170,366	171,176	171,681	172,518	173,052	174,255	175,322	176,380	177,527	178,579	179,368	180,369	181,093	181,990	182,254	182,511	182,851	182,958	183,127	183,344	183,645	184,004	184,520	185,155
B'n & H	277,500	281,428	284,094	285,812	286,908	287,860	289,079	290,218	292,148	293,653	295,316	297,974	299,460	300,811	302,493	303,976	305,392	306,452	307,507	308,492	309,724	310,733	312,010	313,195	314,378	315,905	317,201
Chich.	124,500	126,627	127,991	129,011	129,583	130,201	130,719	131,368	132,191	133,048	133,795	134,804	135,463	136,203	136,813	137,405	138,085	138,310	138,551	138,756	138,882	139,043	139,210	139,394	139,655	140,048	140,577
Crawley	118,200	118,284	118,723	118,902	118,810	118,964	119,060	119,082	119,913	120,104	120,409	121,696	122,015	122,250	122,525	122,912	123,153	123,394	123,617	123,718	123,965	124,103	124,442	124,749	125,163	125,590	126,062
Croydon	390,500	395,025	398,716	400,964	402,852	404,165	405,563	406,797	409,099	410,728	412,561	415,386	416,996	418,452	419,958	421,517	422,731	423,525	424,220	424,971	425,753	426,601	427,570	428,754	429,936	431,449	433,084
E'bourne	101,800	103,495	104,404	105,343	106,004	106,371	106,910	107,350	107,913	108,644	109,217	109,932	110,486	111,183	111,710	112,256	112,793	113,291	113,603	113,829	114,105	114,361	114,659	114,987	115,531	115,985	116,497
Elmb.	138,600	140,770	142,284	143,175	143,808	144,243	144,634	144,927	145,489	145,968	146,500	147,099	147,724	148,281	148,764	149,448	149,989	150,388	150,924	151,264	151,651	152,128	152,632	153,183	153,723	154,416	155,233
Ep. & Ew.	80,900	81,981	83,037	83,628	84,107	84,344	84,559	84,789	85,270	85,537	85,782	86,130	86,499	86,687	86,925	87,192	87,458	87,642	87,843	88,024	88,252	88,500	88,812	89,180	89,543	89,958	90,433
Horsham	146,600	148,566	149,830	150,902	151,443	151,972	152,447	153,003	154,060	154,783	155,570	157,061	157,689	158,213	158,777	159,330	159,835	159,859	160,077	160,179	160,114	160,286	160,330	160,620	160,755	161,210	161,576
Lewes	99,800	101,058	102,066	102,753	103,232	103,530	104,048	104,387	105,007	105,835	106,351	107,180	107,935	108,441	109,009	109,728	110,240	110,549	110,848	111,252	111,509	111,781	112,029	112,356	112,693	113,130	113,669
Mid Sus.	152,100	154,118	155,398	156,452	156,941	157,182	157,422	157,817	158,899	159,443	160,016	161,371	161,919	162,424	163,033	163,814	164,440	164,822	165,245	165,512	165,851	166,033	166,455	166,997	167,539	168,200	168,999
Mole Val.	87,500	88,276	88,866	89,252	89,414	89,534	89,518	89,530	89,928	90,142	90,539	90,952	91,209	91,520	91,738	92,020	92,395	92,493	92,612	92,670	92,778	92,895	93,032	93,184	93,485	93,722	94,008
R. & Ban.	151,000	153,136	155,079	156,383	157,101	157,777	158,318	158,795	159,873	160,552	161,223	162,670	163,322	163,871	164,488	165,159	165,660	166,131	166,646	167,073	167,391	167,947	168,440	169,173	169,738	170,611	171,562
Tandr.	87,900	88,830	89,734	90,385	90,591	90,990	91,138	91,314	91,975	92,281	92,633	93,229	93,751	93,971	94,218	94,487	94,916	95,058	95,151	95,216	95,281	95,385	95,523	95,707	95,944	96,243	96,603
Wealden	160,100	162,738	164,852	166,568	167,605	168,476	169,477	170,586	172,087	173,439	174,590	176,253	177,528	178,669	179,895	181,071	182,194	183,000	183,520	184,062	184,386	184,999	185,437	185,902	186,683	187,433	188,348
Worthing	111,300	112,219	112,860	113,198	113,366	113,610	113,837	114,121	114,464	114,933	115,355	115,826	116,286	116,680	117,049	117,484	117,706	117,945	118,159	118,266	118,262	118,407	118,600	118,665	118,928	119,272	119,657
Study Area	**2,457,600**	**2,489,462**	**2,512,985**	**2,529,473**	**2,539,472**	**2,547,565**	**2,556,039**	**2,564,055**	**2,579,971**	**2,592,080**	**2,604,239**	**2,623,497**	**2,635,584**	**2,646,037**	**2,657,097**	**2,668,595**	**2,679,068**	**2,685,444**	**2,691,613**	**2,696,903**	**2,701,824**	**2,707,495**	**2,713,915**	**2,721,333**	**2,729,385**	**2,739,685**	**2,751,010**
FEMA	416,900	420,968	423,952	426,257	427,193	428,118	428,929	429,902	432,872	434,329	435,995	440,128	441,623	442,887	444,334	446,055	447,429	448,075	448,939	449,409	449,930	450,423	451,227	452,365	453,458	455,000	456,636
LMA	2,113,600	2,140,084	2,159,673	2,173,659	2,181,974	2,188,776	2,196,127	2,202,972	2,217,021	2,227,529	2,238,163	2,255,464	2,265,898	2,274,866	2,284,595	2,294,549	2,303,535	2,309,104	2,314,294	2,318,859	2,323,039	2,327,823	2,333,262	2,339,576	2,346,464	2,355,263	2,364,768

Source: Lichfields using PopGroup

Table A7.4: Scenario 5a: Cambridge Econometrics with Project - Dwelling forecast

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047
Adur	29,121	29,514	29,843	30,054	30,180	30,294	30,445	30,593	30,871	31,064	31,283	31,540	31,763	31,961	32,177	32,405	32,633	32,805	32,963	33,104	33,254	33,420	33,575	33,730	33,795	33,962	34,148
Arun	77,385	78,879	79,879	80,775	81,436	81,955	82,651	83,195	84,010	84,773	85,547	86,380	87,140	87,802	88,562	89,204	89,903	90,325	90,738	91,148	91,498	91,857	92,198	92,536	92,869	93,247	93,657
B'n & H	128,391	129,274	129,927	130,505	130,832	131,188	131,595	132,083	132,860	133,524	134,224	135,400	136,233	137,004	137,894	138,801	139,675	140,432	141,165	141,883	142,647	143,342	144,077	144,719	145,343	146,098	146,752
Chich.	59,682	60,813	61,643	62,333	62,826	63,319	63,777	64,290	64,862	65,429	65,970	66,620	67,147	67,717	68,223	68,734	69,291	69,666	70,019	70,330	70,606	70,900	71,160	71,397	71,627	71,906	72,219
Crawley	47,598	47,830	48,179	48,452	48,616	48,893	49,161	49,381	49,921	50,221	50,572	51,293	51,624	51,941	52,243	52,583	52,864	53,125	53,372	53,552	53,791	53,992	54,249	54,472	54,719	54,965	55,220
Croydon	158,558	160,933	162,981	164,539	165,966	167,233	168,574	169,757	171,275	172,556	173,881	175,518	176,751	177,864	179,001	180,143	181,161	181,959	182,707	183,415	184,175	184,983	185,795	186,603	187,370	188,258	189,152
E'bourne	48,983	49,866	50,420	51,008	51,468	51,834	52,268	52,652	53,091	53,620	54,088	54,614	55,082	55,594	56,028	56,476	56,901	57,311	57,621	57,892	58,194	58,469	58,752	59,019	59,367	59,665	59,974
Elmb.	58,112	59,119	59,946	60,561	61,101	61,562	62,023	62,437	62,940	63,442	63,990	64,524	65,046	65,511	65,961	66,474	66,908	67,268	67,655	67,955	68,271	68,630	68,963	69,289	69,605	69,968	70,371
Ep. & Ew.	32,492	32,919	33,373	33,687	33,965	34,155	34,352	34,568	34,861	35,091	35,308	35,553	35,811	36,004	36,201	36,407	36,607	36,763	36,907	37,046	37,208	37,375	37,561	37,748	37,931	38,134	38,350
Horsham	63,495	64,524	65,333	66,023	66,524	66,993	67,473	67,947	68,615	69,137	69,710	70,517	70,998	71,430	71,875	72,334	72,748	72,968	73,232	73,438	73,603	73,856	74,028	74,261	74,417	74,686	74,906
Lewes	45,250	45,912	46,489	46,935	47,294	47,599	47,993	48,298	48,715	49,223	49,620	50,106	50,553	50,912	51,301	51,740	52,102	52,381	52,647	52,939	53,180	53,423	53,638	53,857	54,072	54,316	54,591
Mid Sus.	63,830	64,857	65,632	66,331	66,807	67,190	67,576	68,021	68,733	69,252	69,782	70,547	71,022	71,480	71,957	72,499	72,965	73,360	73,727	74,031	74,374	74,657	75,004	75,360	75,694	76,068	76,475
Mole Val.	38,588	38,921	39,238	39,472	39,623	39,755	39,872	39,986	40,240	40,439	40,684	40,938	41,111	41,309	41,480	41,665	41,883	41,991	42,098	42,181	42,293	42,412	42,522	42,621	42,764	42,894	43,032
R. & Ban.	61,457	62,439	63,371	64,060	64,543	65,020	65,502	65,939	66,584	67,087	67,606	68,410	68,902	69,368	69,851	70,319	70,728	71,104	71,463	71,764	72,049	72,424	72,745	73,132	73,442	73,861	74,292
Tandr.	36,686	37,198	37,675	38,054	38,253	38,535	38,737	38,966	39,342	39,596	39,880	40,239	40,576	40,807	41,029	41,262	41,552	41,725	41,873	41,983	42,107	42,245	42,374	42,503	42,637	42,793	42,968
Wealden	71,184	72,541	73,732	74,705	75,422	76,089	76,807	77,567	78,438	79,234	79,944	80,857	81,643	82,389	83,143	83,891	84,593	85,157	85,620	86,066	86,447	86,939	87,325	87,695	88,160	88,596	89,075
Worthing	52,070	52,648	53,097	53,398	53,613	53,884	54,166	54,451	54,765	55,119	55,472	55,837	56,190	56,512	56,813	57,152	57,361	57,588	57,805	57,967	58,093	58,279	58,470	58,587	58,768	58,979	59,193
Study Area	**1,072,882**	**1,088,188**	**1,100,757**	**1,110,891**	**1,118,469**	**1,125,498**	**1,132,971**	**1,140,133**	**1,150,124**	**1,158,807**	**1,167,560**	**1,178,894**	**1,187,593**	**1,195,604**	**1,203,739**	**1,212,088**	**1,219,877**	**1,225,927**	**1,231,614**	**1,236,694**	**1,241,790**	**1,247,201**	**1,252,434**	**1,257,528**	**1,262,580**	**1,268,396**	**1,274,374**
FEMA	174,923	177,211	179,144	180,806	181,947	183,076	184,210	185,350	187,270	188,610	190,064	192,357	193,644	194,852	196,076	197,416	198,577	199,453	200,332	201,021	201,768	202,504	203,280	204,093	204,830	205,719	206,601
LMA	922,596	935,337	945,796	954,310	960,577	966,462	972,819	978,838	987,461	994,845	1,002,292	1,012,197	1,019,590	1,026,373	1,033,354	1,040,472	1,047,070	1,052,230	1,057,033	1,061,363	1,065,705	1,070,296	1,074,751	1,079,094	1,083,417	1,088,388	1,093,434

Source: Lichfields using PopGroup

Scenario 8a: Current trajectories

Table A7.5: Scenario 8a: Current trajectories - Dwelling forecast

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047
Adur	29,121	29,328	29,425	30,003	30,601	31,059	31,481	31,905	32,075	32,250	32,379	32,399	32,697	32,995	33,293	33,591	33,889	34,187	34,485	34,783	35,081	35,379	35,677	35,975	36,273	36,571	36,869
Arun	77,385	77,935	79,228	80,480	81,544	82,823	84,413	86,069	87,678	89,230	90,654	91,981	93,308	94,636	95,963	97,291	98,618	99,945	101,273	102,600	103,928	105,255	106,582	107,910	109,237	110,565	111,892
B'n & H	128,391	129,027	130,525	131,875	132,693	133,478	134,631	135,783	136,935	138,087	138,554	138,993	139,431	139,869	140,307	140,745	141,568	142,392	143,216	144,039	144,863	145,686	146,510	147,334	148,157	148,981	149,804
Chich.	59,682	60,488	61,177	61,932	62,708	63,268	64,020	64,659	65,182	65,672	66,161	66,651	67,141	67,598	67,894	68,139	68,698	69,256	69,815	70,374	70,933	71,491	72,050	72,609	73,167	73,726	74,285
Crawley	47,598	47,882	48,250	48,670	48,930	49,567	50,520	51,053	51,519	51,884	52,036	52,121	52,191	52,246	52,301	52,356	52,411	52,631	52,851	53,071	53,291	53,511	53,731	53,951	54,171	54,391	54,611
Croydon	158,558	161,198	163,838	166,478	167,407	168,336	169,265	170,194	171,123	172,052	172,981	173,910	174,839	175,768	176,697	177,626	178,897	180,168	181,439	182,710	183,981	185,252	186,523	187,794	189,065	190,336	191,607
E'bourne	48,983	49,233	49,489	49,767	50,114	50,460	50,755	51,051	51,346	51,642	51,937	52,232	52,528	52,823	53,119	53,414	53,709	54,005	54,300	54,596	54,891	55,186	55,482	55,777	56,073	56,368	56,663
Elmb.	58,112	58,864	59,615	60,366	61,117	61,868	62,198	62,528	62,858	63,188	63,517	63,987	64,457	64,927	65,395	65,863	65,963	66,454	66,945	67,436	67,927	68,418	68,909	69,400	69,891	70,382	70,873
Ep. & Ew.	32,492	32,714	32,887	33,005	33,158	33,328	33,498	33,668	33,838	34,008	34,152	34,296	34,440	34,584	34,728	34,789	34,849	34,997	35,144	35,291	35,438	35,586	35,733	35,880	36,028	36,175	36,322
Horsham	63,495	64,186	64,833	65,765	66,597	67,273	68,133	68,840	69,500	70,097	70,644	71,359	72,074	72,789	73,504	74,219	74,933	75,648	76,363	77,078	77,793	78,508	79,222	79,937	80,652	81,367	82,082
Lewes	45,250	45,668	46,096	46,525	46,953	47,381	47,809	48,238	48,666	49,094	49,522	49,951	50,379	50,807	51,236	51,664	52,092	52,520	52,949	53,377	53,805	54,233	54,662	55,090	55,518	55,947	56,375
Mid Sus.	63,830	65,123	66,433	67,346	67,984	69,022	70,061	71,099	72,138	73,176	74,215	75,253	76,292	77,330	78,369	79,407	80,446	81,484	82,523	83,561	84,600	85,638	86,677	87,715	88,754	89,792	90,831
Mole Val.	38,588	38,905	39,222	39,539	39,856	40,172	40,489	40,806	41,123	41,440	41,756	42,073	42,390	42,707	43,024	43,340	43,657	43,974	44,291	44,608	44,924	45,241	45,558	45,875	46,192	46,508	46,825
R. & Ban.	61,457	62,039	62,622	63,205	63,788	64,371	64,953	65,536	66,119	66,702	67,285	67,867	68,450	69,033	69,616	70,199	70,781	71,364	71,947	72,530	73,113	73,695	74,278	74,861	75,444	76,027	76,609
Tandr.	36,686	37,270	37,712	38,031	38,114	38,197	38,499	38,802	39,104	39,406	39,708	40,010	40,313	40,615	40,917	41,219	41,521	41,824	42,126	42,428	42,730	43,032	43,335	43,637	43,939	44,241	44,543
Wealden	71,184	72,311	73,438	74,566	75,694	76,822	77,949	79,077	80,205	81,333	82,461	83,588	84,716	85,844	86,972	88,099	89,227	90,355	91,483	92,610	93,738	94,866	95,994	97,121	98,249	99,377	100,505
Worthing	52,070	52,398	53,201	53,615	54,120	54,465	54,944	55,423	55,902	56,381	56,860	57,339	57,818	58,297	58,776	59,255	59,734	60,213	60,692	61,171	61,650	62,129	62,608	63,087	63,566	64,045	64,524
Study Area	**1,072,882**	**1,084,569**	**1,097,991**	**1,111,166**	**1,121,377**	**1,131,889**	**1,143,620**	**1,154,730**	**1,165,311**	**1,175,641**	**1,184,822**	**1,194,011**	**1,203,463**	**1,212,868**	**1,222,108**	**1,231,215**	**1,240,995**	**1,251,417**	**1,261,840**	**1,272,263**	**1,282,685**	**1,293,108**	**1,303,530**	**1,313,953**	**1,324,375**	**1,334,798**	**1,345,221**
FEMA	174,923	177,191	179,515	181,780	183,510	185,861	188,714	190,992	193,157	195,157	196,895	198,733	200,556	202,365	204,173	205,981	207,790	209,763	211,736	213,710	215,683	217,656	219,630	221,603	223,577	225,550	227,523
LMA	922,596	932,502	944,312	955,863	964,393	973,425	983,903	993,875	1,003,432	1,012,772	1,020,991	1,029,077	1,037,425	1,045,758	1,054,091	1,062,424	1,071,484	1,080,710	1,089,936	1,099,161	1,108,387	1,117,612	1,126,838	1,136,063	1,145,289	1,154,515	1,163,740

Source: Lichfields using PopGroup. *May not match dwelling trajectories precisely due to rounding and model functionality.

Table A7.6: Scenario 8a: Current trajectories - Population forecast

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047
Adur	64,500	64,881	64,964	66,272	67,626	68,610	69,395	70,186	70,335	70,524	70,596	70,376	70,882	71,418	71,935	72,465	73,009	73,551	74,120	74,678	75,207	75,702	76,247	76,815	77,399	77,987	78,577
Arun	164,800	165,297	167,534	169,731	171,487	173,763	176,654	179,723	182,664	185,447	187,880	190,035	192,273	194,475	196,651	198,822	201,021	203,219	205,408	207,677	209,820	211,991	214,249	216,597	219,004	221,456	223,952
B'n & H	277,500	280,769	285,763	289,452	291,676	293,595	296,682	299,380	302,027	304,618	305,327	305,759	306,177	306,661	307,166	307,480	308,944	310,311	311,675	312,964	314,348	315,694	317,172	318,797	320,443	322,065	323,746
Chich.	124,500	125,799	126,846	128,075	129,390	130,149	131,398	132,314	132,961	133,595	134,206	134,806	135,396	135,869	135,973	135,943	136,695	137,422	138,180	138,975	139,757	140,509	141,340	142,234	143,210	144,189	145,223
Crawley	118,200	118,426	118,913	119,489	119,648	120,768	122,701	123,505	124,062	124,383	124,092	123,610	123,240	122,793	122,437	122,094	121,776	121,951	122,131	122,363	122,571	122,770	123,013	123,313	123,656	124,016	124,402
Croydon	390,500	395,781	401,142	406,422	406,762	407,068	407,272	407,786	408,417	409,099	409,869	410,756	411,618	412,655	413,664	414,721	416,753	418,946	421,133	423,461	425,645	427,744	429,938	432,342	434,845	437,327	439,919
E'bourne	101,800	102,007	102,263	102,524	102,972	103,340	103,585	103,855	104,115	104,337	104,555	104,782	104,993	105,245	105,516	105,771	106,069	106,363	106,698	107,026	107,329	107,667	108,027	108,446	108,897	109,371	109,878
Elmb.	138,600	140,039	141,369	142,677	143,914	145,160	145,118	145,167	145,229	145,229	145,160	145,632	146,154	146,766	147,327	147,901	147,514	148,355	149,200	150,082	150,946	151,772	152,694	153,669	154,658	155,661	156,680
Ep. & Ew.	80,900	81,350	81,569	81,610	81,764	82,001	82,175	82,305	82,445	82,581	82,645	82,732	82,806	82,910	83,039	82,910	82,816	83,050	83,315	83,569	83,793	84,024	84,262	84,550	84,847	85,137	85,447
Horsham	146,600	147,650	148,507	150,263	151,698	152,759	154,235	155,366	156,340	157,217	157,889	159,101	160,339	161,580	162,815	163,987	165,226	166,480	167,784	169,117	170,366	171,610	172,934	174,332	175,775	177,229	178,727
Lewes	99,800	100,428	101,071	101,736	102,409	103,034	103,641	104,296	104,930	105,544	106,143	106,821	107,532	108,221	108,889	109,576	110,259	110,940	111,635	112,363	113,067	113,774	114,520	115,334	116,162	117,012	117,887
Mid Sus.	152,100	154,858	157,610	159,193	160,079	162,089	164,036	165,945	167,790	169,652	171,478	173,417	175,370	177,304	179,269	181,216	183,217	185,142	187,173	189,204	191,178	193,137	195,153	197,264	199,429	201,597	203,811
Mole Val.	87,500	88,233	88,823	89,439	90,051	90,657	91,166	91,694	92,217	92,717	93,264	93,806	94,418	95,009	95,579	96,167	96,756	97,371	97,994	98,618	99,203	99,777	100,395	101,055	101,744	102,402	103,085
R. & Ban.	151,000	152,022	153,030	154,087	155,118	156,102	156,934	157,825	158,719	159,628	160,468	161,286	162,219	163,097	163,988	164,963	165,934	166,960	168,062	169,227	170,314	171,381	172,545	173,760	175,018	176,275	177,583
Tandr.	87,900	89,035	89,832	90,316	90,201	90,059	90,514	90,898	91,353	91,807	92,214	92,652	93,082	93,510	93,976	94,431	94,887	95,378	95,874	96,441	96,960	97,476	98,049	98,659	99,308	99,958	100,618
Wealden	160,100	162,131	164,098	166,236	168,351	170,397	172,417	174,418	176,513	178,654	180,802	182,921	184,991	187,023	189,106	191,146	193,246	195,373	197,452	199,576	201,622	203,658	205,790	207,979	210,235	212,527	214,873
Worthing	111,300	111,637	113,113	113,703	114,538	114,930	115,600	116,314	117,014	117,749	118,435	119,146	119,872	120,604	121,355	122,084	122,898	123,678	124,451	125,241	125,990	126,748	127,543	128,379	129,264	130,159	131,092
Study Area	**2,457,600**	**2,480,343**	**2,506,446**	**2,531,225**	**2,547,684**	**2,564,481**	**2,583,522**	**2,600,976**	**2,617,132**	**2,632,780**	**2,645,022**	**2,657,637**	**2,671,364**	**2,685,140**	**2,698,684**	**2,711,678**	**2,727,019**	**2,744,490**	**2,762,284**	**2,780,581**	**2,798,116**	**2,815,438**	**2,833,873**	**2,853,525**	**2,873,892**	**2,894,368**	**2,915,500**
FEMA	416,900	420,934	425,030	428,945	431,425	435,616	440,972	444,815	448,192	451,252	453,458	456,127	458,949	461,677	464,520	467,298	470,219	473,573	477,088	480,684	484,116	487,518	491,100	494,909	498,859	502,842	506,940
LMA	2,113,600	2,133,156	2,156,662	2,178,863	2,192,616	2,207,172	2,224,831	2,241,189	2,256,497	2,271,375	2,283,011	2,294,467	2,307,007	2,319,595	2,332,345	2,344,924	2,359,994	2,375,663	2,391,590	2,407,955	2,423,621	2,439,132	2,455,577	2,473,072	2,491,177	2,509,382	2,528,150

Source: Lichfields using PopGroup

Table A7.7: Scenario 8a: Current trajectories – Labour supply forecast

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047
Adur	33,632	33,837	33,855	34,729	35,626	36,286	36,807	37,329	37,404	37,483	37,466	37,232	37,471	37,747	37,987	38,203	38,416	38,724	39,044	39,387	39,711	40,006	40,317	40,623	40,942	41,218	41,460
Arun	82,075	82,069	83,171	84,176	85,069	86,298	87,831	89,472	90,904	92,049	93,120	93,949	94,822	95,675	96,532	97,396	98,325	99,490	100,649	101,965	103,189	104,387	105,598	106,804	108,008	109,129	110,177
B'n & H	159,220	161,294	164,475	166,947	168,473	169,895	171,888	173,670	175,289	176,781	176,912	176,902	176,887	177,000	177,018	176,966	177,734	178,650	179,531	180,527	181,427	182,354	183,285	184,277	185,283	186,134	186,997
Chich.	64,389	64,874	65,189	65,676	66,330	66,677	67,309	67,720	67,833	67,963	68,067	68,142	68,266	68,353	68,208	67,997	68,318	68,820	69,326	69,954	70,528	71,054	71,616	72,199	72,779	73,268	73,692
Crawley	67,622	67,651	67,816	68,082	68,109	68,886	70,174	70,731	71,008	71,139	70,849	70,458	70,119	69,802	69,534	69,209	68,942	69,093	69,249	69,452	69,602	69,745	69,844	69,937	70,050	70,093	70,142
Croydon	214,238	216,876	219,649	222,391	222,094	221,993	221,791	221,759	221,715	221,775	221,777	221,960	222,128	222,512	222,850	223,186	224,198	225,666	227,059	228,623	229,913	231,083	232,217	233,331	234,500	235,435	236,282
E'bourne	50,413	50,267	50,210	50,152	50,274	50,417	50,490	50,527	50,574	50,557	50,529	50,486	50,426	50,414	50,408	50,383	50,389	50,513	50,663	50,853	50,994	51,164	51,320	51,491	51,658	51,787	51,894
Elmb.	73,930	74,528	75,169	75,883	76,606	77,452	77,481	77,523	77,605	77,551	77,534	77,797	78,074	78,452	78,737	79,003	78,630	79,147	79,688	80,264	80,789	81,219	81,688	82,151	82,624	83,002	83,299
Ep. & Ew.	44,320	44,388	44,326	44,225	44,278	44,430	44,554	44,636	44,753	44,855	44,925	44,963	45,030	45,115	45,186	45,066	44,970	45,140	45,323	45,505	45,634	45,751	45,831	45,908	45,994	46,044	46,068
Horsham	79,794	80,237	80,558	81,487	82,320	82,904	83,788	84,377	84,806	85,153	85,323	85,850	86,461	87,142	87,784	88,387	89,059	89,930	90,818	91,794	92,701	93,558	94,424	95,289	96,163	96,941	97,640
Lewes	50,573	50,920	51,230	51,549	52,004	52,434	52,813	53,227	53,550	53,770	54,075	54,328	54,619	54,948	55,221	55,515	55,832	56,268	56,718	57,225	57,700	58,163	58,662	59,149	59,637	60,071	60,443
Mid Sus.	84,115	85,694	87,277	88,081	88,549	89,937	91,264	92,442	93,510	94,584	95,605	96,652	97,724	98,810	99,837	100,851	101,880	103,023	104,208	105,510	106,711	107,875	109,028	110,155	111,317	112,384	113,338
Mole Val.	47,342	47,849	48,296	48,717	49,194	49,691	50,118	50,534	50,865	51,152	51,436	51,712	52,008	52,345	52,639	52,900	53,188	53,589	53,980	54,412	54,778	55,129	55,492	55,872	56,259	56,575	56,865
R. & Ban.	84,106	84,473	84,857	85,382	85,951	86,624	87,166	87,781	88,285	88,811	89,294	89,739	90,253	90,800	91,306	91,828	92,345	93,019	93,710	94,492	95,178	95,798	96,407	96,999	97,618	98,142	98,608
Tandr.	47,819	48,450	48,880	49,145	49,064	48,968	49,299	49,567	49,823	50,097	50,310	50,520	50,711	50,973	51,242	51,484	51,746	52,085	52,460	52,895	53,294	53,661	54,037	54,406	54,762	55,076	55,342
Wealden	83,160	84,248	85,227	86,297	87,507	88,770	89,922	90,981	92,015	93,044	94,062	95,082	96,044	97,065	98,059	99,053	100,117	101,388	102,679	104,119	105,504	106,829	108,183	109,548	110,886	112,118	113,248
Worthing	59,282	59,410	60,252	60,512	61,032	61,215	61,582	61,938	62,241	62,523	62,802	63,056	63,295	63,578	63,889	64,140	64,481	64,886	65,301	65,796	66,230	66,673	67,105	67,538	67,974	68,358	68,729
Study Area	**1,326,030**	**1,337,064**	**1,350,437**	**1,363,430**	**1,372,478**	**1,382,874**	**1,394,278**	**1,404,216**	**1,412,181**	**1,419,287**	**1,424,086**	**1,428,827**	**1,434,339**	**1,440,730**	**1,446,436**	**1,451,570**	**1,458,568**	**1,469,430**	**1,480,405**	**1,492,773**	**1,503,883**	**1,514,451**	**1,525,054**	**1,535,675**	**1,546,454**	**1,555,777**	**1,564,224**
FEMA	231,531	233,582	235,650	237,650	238,977	241,727	245,227	247,551	249,323	250,875	251,776	252,959	254,305	255,754	257,156	258,448	259,880	262,046	264,275	266,756	269,014	271,178	273,297	275,380	277,530	279,418	281,121
LMA	1,143,392	1,153,275	1,165,752	1,177,646	1,185,264	1,194,316	1,204,934	1,214,338	1,221,990	1,228,919	1,233,560	1,237,926	1,242,969	1,248,810	1,254,306	1,259,504	1,266,649	1,276,323	1,286,069	1,297,051	1,306,933	1,316,427	1,325,920	1,335,417	1,345,057	1,353,463	1,361,166

Source: Lichfields using PopGroup

Table A7.8: Scenario 8a: Current trajectories – Job forecast

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047
Adur	26,400	26,561	26,575	27,262	27,965	28,483	28,893	29,302	29,362	29,424	29,410	29,227	29,414	29,631	29,819	29,989	30,156	30,397	30,649	30,918	31,172	31,403	31,648	31,888	32,139	32,355	32,545
Arun	53,700	53,696	54,417	55,075	55,659	56,463	57,466	58,540	59,476	60,226	60,926	61,469	62,040	62,598	63,159	63,724	64,332	65,094	65,852	66,714	67,515	68,298	69,090	69,880	70,667	71,401	72,087
B'n & H	164,900	167,047	170,342	172,902	174,483	175,955	178,019	179,865	181,542	183,087	183,222	183,213	183,197	183,314	183,332	183,279	184,074	185,023	185,935	186,967	187,899	188,859	189,823	190,851	191,893	192,774	193,667
Chich.	76,200	76,774	77,148	77,724	78,498	78,908	79,656	80,142	80,276	80,430	80,553	80,642	80,789	80,891	80,720	80,471	80,851	81,445	82,043	82,786	83,465	84,088	84,753	85,443	86,129	86,708	87,210
Crawley	100,400	100,443	100,688	101,082	101,123	102,277	104,190	105,017	105,427	105,621	105,191	104,610	104,108	103,637	103,239	102,757	102,359	102,584	102,815	103,117	103,339	103,552	103,699	103,836	104,004	104,069	104,142
Croydon	148,600	150,429	152,353	154,255	154,049	153,978	153,839	153,816	153,786	153,828	153,829	153,956	154,073	154,339	154,573	154,806	155,508	156,527	157,493	158,577	159,473	160,284	161,070	161,843	162,654	163,303	163,890
E'bourne	47,000	46,863	46,811	46,757	46,870	47,003	47,071	47,106	47,150	47,134	47,107	47,068	47,012	47,001	46,995	46,972	46,977	47,093	47,233	47,410	47,541	47,700	47,845	48,004	48,160	48,281	48,380
Elmb.	68,900	69,457	70,055	70,720	71,394	72,182	72,210	72,248	72,325	72,274	72,259	72,503	72,761	73,114	73,379	73,627	73,280	73,762	74,266	74,803	75,292	75,693	76,130	76,562	77,003	77,355	77,631
Ep. & Ew.	36,600	36,656	36,605	36,522	36,566	36,691	36,793	36,861	36,958	37,042	37,100	37,131	37,187	37,257	37,315	37,216	37,137	37,277	37,428	37,579	37,685	37,782	37,848	37,911	37,982	38,024	38,043
Horsham	68,600	68,981	69,257	70,056	70,771	71,274	72,034	72,540	72,909	73,207	73,353	73,806	74,332	74,917	75,469	75,988	76,565	77,314	78,078	78,917	79,696	80,433	81,178	81,921	82,673	83,342	83,943
Lewes	47,500	47,826	48,117	48,416	48,844	49,247	49,604	49,992	50,296	50,503	50,789	51,026	51,299	51,609	51,865	52,142	52,439	52,849	53,271	53,747	54,194	54,629	55,098	55,555	56,013	56,421	56,770
Mid Sus.	70,100	71,416	72,735	73,405	73,795	74,952	76,058	77,039	77,929	78,824	79,675	80,548	81,442	82,346	83,202	84,047	84,905	85,857	86,845	87,930	88,931	89,901	90,862	91,801	92,769	93,659	94,454
Mole Val.	53,000	53,568	54,068	54,540	55,073	55,630	56,108	56,574	56,945	57,265	57,584	57,892	58,224	58,601	58,930	59,222	59,545	59,994	60,431	60,915	61,325	61,718	62,125	62,550	62,983	63,337	63,662
R. & Ban.	76,200	76,533	76,881	77,356	77,872	78,482	78,973	79,530	79,987	80,463	80,901	81,304	81,769	82,266	82,724	83,197	83,665	84,275	84,902	85,611	86,231	86,793	87,345	87,881	88,442	88,917	89,339
Tandr.	38,300	38,805	39,149	39,362	39,297	39,220	39,485	39,700	39,905	40,124	40,295	40,463	40,616	40,826	41,041	41,235	41,445	41,717	42,017	42,365	42,685	42,979	43,280	43,575	43,861	44,112	44,325
Wealden	62,400	63,216	63,951	64,754	65,661	66,609	67,474	68,269	69,045	69,816	70,581	71,345	72,067	72,833	73,579	74,326	75,123	76,077	77,046	78,126	79,166	80,160	81,176	82,201	83,204	84,129	84,976
Worthing	59,100	59,228	60,067	60,326	60,845	61,027	61,393	61,748	62,050	62,331	62,610	62,863	63,101	63,382	63,693	63,943	64,283	64,687	65,100	65,594	66,027	66,469	66,899	67,330	67,765	68,148	68,519
Study Area	**1,197,900**	**1,207,500**	**1,219,218**	**1,230,511**	**1,238,763**	**1,248,381**	**1,259,265**	**1,268,291**	**1,275,366**	**1,281,601**	**1,285,385**	**1,289,066**	**1,293,432**	**1,298,561**	**1,303,036**	**1,306,941**	**1,312,643**	**1,321,971**	**1,331,405**	**1,342,076**	**1,351,637**	**1,360,742**	**1,369,869**	**1,379,032**	**1,388,342**	**1,396,333**	**1,403,583**
FEMA	239,100	240,840	242,680	244,543	245,689	248,502	252,282	254,597	256,265	257,653	258,219	258,964	259,881	260,900	261,911	262,792	263,829	265,755	267,738	269,963	271,967	273,887	275,739	277,559	279,447	281,069	282,539
LMA	1,016,200	1,024,613	1,035,410	1,045,546	1,052,306	1,060,600	1,070,606	1,079,040	1,085,808	1,091,855	1,095,473	1,098,790	1,102,694	1,107,299	1,111,622	1,115,627	1,121,375	1,129,487	1,137,668	1,146,909	1,155,194	1,163,179	1,171,138	1,179,116	1,187,228	1,194,247	1,200,698

Source: Lichfields using PopGroup

Table A7.9: Difference in labour supply between Cambridge Econometrics forecast with Project and Current housing trajectory scenarios by local authority

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047
Adur	0	-304	-669	-49	720	1,253	1,647	2,041	1,792	1,706	1,512	1,089	1,201	1,351	1,464	1,554	1,640	1,821	2,016	2,233	2,431	2,600	2,785	2,965	3,286	3,436	3,552
Arun	0	-1,382	-891	-345	243	1,319	2,546	4,035	5,005	5,938	6,643	7,111	7,679	8,380	8,932	9,645	10,269	11,292	12,299	13,312	14,385	15,432	16,491	17,547	18,599	19,570	20,484
B'n & H	0	-437	1,103	2,416	3,170	3,819	5,039	6,049	6,500	7,182	6,502	4,964	4,177	3,518	2,667	1,844	1,840	2,027	2,234	2,459	2,587	2,839	2,999	3,316	3,648	3,728	3,996
Chich.	0	-529	-720	-571	-86	7	470	627	498	341	244	-23	-67	-234	-547	-926	-858	-520	-183	193	599	957	1,351	1,766	2,178	2,499	2,763
Crawley	0	96	127	392	554	1,197	2,418	2,907	2,668	2,706	2,255	1,022	549	98	-304	-764	-1,098	-1,093	-1,071	-935	-918	-842	-876	-851	-871	-894	-933
Croydon	0	475	1,518	3,395	2,377	1,699	921	456	-584	-1,157	-1,788	-2,955	-3,363	-3,555	-3,793	-4,033	-3,453	-2,526	-1,564	-575	285	1,024	1,727	2,410	3,148	3,653	4,144
E'bourne	0	-897	-1,276	-1,655	-1,749	-1,713	-1,854	-1,924	-2,074	-2,347	-2,525	-2,780	-2,947	-3,173	-3,285	-3,417	-3,517	-3,602	-3,558	-3,474	-3,439	-3,374	-3,325	-3,260	-3,306	-3,283	-3,273
Elmb.	0	-475	-585	-301	100	625	332	159	-174	-485	-865	-930	-974	-917	-846	-901	-1,488	-1,179	-959	-597	-285	-68	188	438	697	862	954
Ep. & Ew.	0	-416	-962	-1,306	-1,494	-1,464	-1,461	-1,501	-1,703	-1,768	-1,866	-2,017	-2,191	-2,227	-2,276	-2,516	-2,733	-2,681	-2,618	-2,555	-2,546	-2,548	-2,588	-2,630	-2,664	-2,734	-2,826
Horsham	0	-604	-865	-400	199	551	1,203	1,559	1,475	1,544	1,437	1,225	1,604	2,053	2,464	2,835	3,275	4,039	4,696	5,441	6,233	6,859	7,610	8,243	9,003	9,550	10,174
Lewes	0	-398	-621	-622	-486	-269	-209	-8	-3	-143	-92	-191	-219	-102	-41	-65	39	269	508	696	960	1,212	1,499	1,774	2,051	2,273	2,444
Mid Sus.	0	499	1,482	1,806	2,034	3,182	4,270	5,207	5,623	6,411	7,145	7,423	8,257	9,103	9,890	10,546	11,335	12,246	13,192	14,256	15,218	16,264	17,178	18,067	18,990	19,819	20,574
Mole Val.	0	-29	-28	125	423	741	1,079	1,406	1,465	1,627	1,698	1,756	1,964	2,122	2,327	2,500	2,609	2,924	3,227	3,570	3,849	4,111	4,386	4,678	4,888	5,115	5,326
R. & Ban.	0	-737	-1,345	-1,483	-1,245	-1,014	-803	-518	-636	-485	-376	-798	-614	-397	-222	-30	267	616	978	1,430	1,896	2,187	2,576	2,838	3,238	3,432	3,608
Tandr.	0	132	62	-48	-254	-599	-393	-249	-377	-276	-236	-336	-394	-256	-111	7	20	240	492	803	1,079	1,323	1,575	1,820	2,053	2,244	2,400
Wealden	0	-378	-465	-195	482	1,212	1,831	2,357	2,686	3,129	3,696	3,922	4,353	4,841	5,303	5,765	6,297	7,047	7,941	8,848	9,835	10,629	11,585	12,552	13,358	14,193	14,946
Worthing	0	-374	167	327	747	830	1,096	1,352	1,556	1,699	1,839	1,962	2,100	2,284	2,495	2,646	2,988	3,298	3,613	4,010	4,445	4,789	5,122	5,556	5,893	6,178	6,460
Study Area	**0**	**-5,758**	**-3,970**	**1,486**	**5,735**	**11,374**	**18,132**	**23,956**	**23,717**	**25,622**	**25,223**	**20,442**	**21,114**	**22,889**	**24,118**	**24,690**	**27,431**	**34,217**	**41,242**	**49,116**	**56,614**	**63,393**	**70,284**	**77,230**	**84,190**	**89,641**	**94,793**

Source: Lichfields using PopGroup

Table A7.10: Difference in labour supply between Cambridge Econometrics forecast with Project and Current housing trajectory scenarios by housing market area

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047
North West Sussex	0	-8	744	1,798	2,787	4,929	7,890	9,674	9,767	10,661	10,836	9,670	10,410	11,253	12,050	12,617	13,511	15,192	16,817	18,762	20,533	22,281	23,912	25,460	27,122	28,474	29,815
Croydon and East Surrey	0	-130	234	1,864	878	86	-275	-312	-1,597	-1,918	-2,400	-4,089	-4,371	-4,208	-4,126	-4,055	-3,166	-1,670	-95	1,658	3,260	4,533	5,878	7,068	8,440	9,329	10,152
Coastal West Sussex	0	-3,424	-1,631	1,157	4,308	6,958	10,590	14,097	15,348	16,723	16,648	14,911	14,871	15,196	14,971	14,698	15,918	18,187	20,487	22,902	25,407	27,828	30,247	32,925	35,655	37,685	39,699
North East Surrey	0	-920	-1,576	-1,482	-971	-98	-50	64	-412	-626	-1,033	-1,192	-1,202	-1,022	-795	-918	-1,612	-936	-350	419	1,018	1,495	1,986	2,485	2,921	3,244	3,454
Wealden and Eastbourne	0	-1,275	-1,741	-1,851	-1,267	-501	-24	433	611	782	1,171	1,142	1,406	1,668	2,018	2,349	2,779	3,445	4,383	5,375	6,396	7,255	8,260	9,292	10,052	10,910	11,673
Study Area	**0**	**-5,758**	**-3,970**	**1,486**	**5,735**	**11,374**	**18,132**	**23,956**	**23,717**	**25,622**	**25,223**	**20,442**	**21,114**	**22,889**	**24,118**	**24,690**	**27,431**	**34,217**	**41,242**	**49,116**	**56,614**	**63,393**	**70,284**	**77,230**	**84,190**	**89,641**	**94,793**

Annex 8

Detailed outputs for labour supply analysis (Section 5.0) – Experian and Standard Method Housing

Scenario 7a: Experian (March 2022) with the Project outputs

Table A8.10: Scenario 7a: Experian with Project - Job forecast

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047
Adur	24,600	25,100	25,500	25,700	25,900	26,100	26,300	26,500	26,655	26,894	27,033	27,172	27,271	27,370	27,570	27,669	27,868	28,068	28,166	28,465	28,664	28,863	29,063	29,264	29,467	29,672	29,878
Arun	54,400	55,300	55,800	56,100	56,400	56,600	56,800	57,000	57,202	57,373	57,545	57,716	57,815	57,813	57,912	58,010	58,208	58,407	58,604	58,802	59,099	59,397	59,696	59,996	60,299	60,602	60,908
B'n & H	172,500	177,500	180,400	182,300	184,100	185,900	187,500	189,300	191,210	193,098	194,985	196,772	198,264	199,756	201,248	202,439	204,131	206,123	208,113	210,202	212,392	214,681	216,996	219,336	221,701	224,092	226,510
Chich.	77,400	78,900	79,900	80,500	81,100	81,600	82,100	82,600	83,187	83,548	84,009	84,469	84,868	85,166	85,565	85,963	86,462	87,060	87,658	88,256	88,954	89,652	90,355	91,064	91,778	92,498	93,224
Crawley	103,500	105,900	107,000	107,600	108,200	108,800	109,400	109,900	110,965	111,875	112,884	113,793	114,295	114,898	115,400	116,002	116,604	117,507	118,298	119,189	120,180	121,171	122,171	123,179	124,196	125,221	126,255
Croydon	135,500	137,400	139,500	141,000	142,000	143,100	144,100	145,100	146,291	147,296	148,301	149,406	150,302	151,197	152,092	152,988	153,983	155,179	156,472	157,965	159,458	160,851	162,256	163,674	165,104	166,547	168,003
E'bourne	46,300	47,300	47,900	48,300	48,600	49,000	49,300	49,600	49,884	50,142	50,401	50,560	50,758	50,957	51,055	51,154	51,452	51,651	51,949	52,247	52,545	52,942	53,343	53,748	54,155	54,565	54,978
Elmb.	71,100	72,500	73,400	74,000	74,500	75,100	75,600	76,200	76,787	77,248	77,709	78,070	78,469	78,767	79,066	79,464	79,863	80,361	80,959	81,557	82,155	82,753	83,355	83,962	84,573	85,188	85,808
Ep. & Ew.	34,300	35,200	35,800	36,200	36,700	37,000	37,400	37,700	38,064	38,408	38,753	39,097	39,396	39,595	39,894	40,093	40,392	40,791	41,089	41,488	41,886	42,285	42,687	43,093	43,503	43,917	44,335
Horsham	66,600	67,900	68,700	69,200	69,600	70,100	70,500	70,800	71,341	71,611	71,982	72,453	72,751	73,049	73,447	73,745	74,143	74,641	75,136	75,731	76,326	76,921	77,521	78,126	78,735	79,349	79,968
Lewes	43,800	44,700	45,200	45,600	45,800	46,100	46,400	46,600	46,898	47,168	47,437	47,606	47,804	47,902	48,101	48,199	48,497	48,796	48,993	49,291	49,688	49,986	50,285	50,587	50,890	51,195	51,502
Mid Sus.	69,000	70,300	71,100	71,500	71,900	72,300	72,700	72,900	73,343	73,616	73,889	74,162	74,260	74,358	74,457	74,555	74,754	75,052	75,347	75,642	75,937	76,333	76,730	77,129	77,531	77,934	78,340
Mole Val.	55,400	56,500	57,300	57,800	58,200	58,600	59,000	59,400	59,905	60,279	60,653	61,127	61,426	61,725	62,024	62,322	62,721	63,220	63,618	64,116	64,713	65,211	65,713	66,218	66,727	67,241	67,758
R. & Ban.	81,900	83,900	85,300	86,200	87,100	88,000	88,800	89,500	90,563	91,551	92,539	93,526	94,325	95,123	95,922	96,720	97,619	98,617	99,712	100,807	102,001	103,196	104,405	105,628	106,866	108,119	109,387
Tandr.	37,600	38,400	38,900	39,300	39,600	39,900	40,200	40,500	40,807	41,082	41,357	41,632	41,831	42,030	42,128	42,227	42,426	42,725	42,922	43,220	43,518	43,815	44,115	44,417	44,720	45,027	45,335
Wealden	61,700	63,100	63,900	64,400	64,900	65,300	65,700	66,100	66,529	66,920	67,211	67,602	67,900	68,098	68,396	68,594	68,892	69,289	69,686	70,083	70,580	70,977	71,376	71,778	72,181	72,587	72,996
Worthing	56,200	57,900	58,900	59,600	60,200	60,800	61,400	62,000	62,599	63,068	63,538	64,107	64,506	65,005	65,503	65,902	66,400	66,999	67,597	68,295	68,892	69,590	70,295	71,007	71,726	72,453	73,187
Study Area	**1,191,800**	**1,217,800**	**1,234,500**	**1,245,300**	**1,254,800**	**1,264,300**	**1,273,200**	**1,281,700**	**1,292,230**	**1,301,177**	**1,310,224**	**1,319,271**	**1,326,240**	**1,332,809**	**1,339,779**	**1,346,048**	**1,354,417**	**1,364,486**	**1,374,321**	**1,385,355**	**1,396,989**	**1,408,623**	**1,420,361**	**1,432,204**	**1,444,153**	**1,456,209**	**1,468,373**
FEMA	239,100	244,100	246,800	248,300	249,700	251,200	252,600	253,600	255,649	257,102	258,755	260,408	261,307	262,305	263,304	264,303	265,501	267,200	268,781	270,563	272,444	274,425	276,422	278,434	280,461	282,505	284,564
LMA	1,009,000	1,031,200	1,045,400	1,054,600	1,062,500	1,070,600	1,078,100	1,085,200	1,094,192	1,101,973	1,109,754	1,117,634	1,123,508	1,129,281	1,135,254	1,140,527	1,147,701	1,156,274	1,164,614	1,174,054	1,183,994	1,193,934	1,203,965	1,214,086	1,224,299	1,234,605	1,245,005

Source: Lichfields using PopGroup. *May not match CE forecast precisely due to rounding in modelling.

Table A8.11: Scenario 7a: Experian with Project – Labour supply forecast

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047
Adur	33,632	34,315	34,862	35,135	35,409	35,682	35,956	36,229	36,441	36,768	36,957	37,147	37,283	37,419	37,691	37,827	38,100	38,372	38,507	38,916	39,188	39,459	39,733	40,009	40,286	40,566	40,847
Arun	82,075	83,433	84,187	84,640	85,093	85,394	85,696	85,998	86,302	86,561	86,820	87,079	87,227	87,225	87,373	87,521	87,821	88,120	88,418	88,716	89,165	89,614	90,065	90,519	90,975	91,433	91,893
B'n & H	159,220	163,836	166,512	168,266	169,927	171,589	173,066	174,727	176,491	178,232	179,974	181,624	183,001	184,378	185,755	186,855	188,417	190,255	192,092	194,020	196,041	198,155	200,291	202,451	204,634	206,841	209,073
Chich.	64,389	65,636	66,468	66,967	67,467	67,883	68,299	68,714	69,203	69,503	69,886	70,270	70,601	70,849	71,181	71,512	71,927	72,425	72,922	73,420	74,000	74,581	75,166	75,755	76,350	76,949	77,553
Crawley	67,622	69,190	69,909	70,301	70,693	71,085	71,477	71,804	72,500	73,094	73,753	74,347	74,675	75,069	75,397	75,790	76,184	76,773	77,290	77,872	78,520	79,168	79,821	80,479	81,144	81,814	82,489
Croydon	214,238	217,242	220,563	222,934	224,515	226,255	227,836	229,417	231,301	232,889	234,478	236,225	237,641	239,057	240,473	241,888	243,462	245,352	247,397	249,757	252,118	254,320	256,542	258,784	261,046	263,327	265,629
E'bourne	50,413	51,502	52,155	52,591	52,918	53,353	53,680	54,007	54,315	54,597	54,879	55,052	55,268	55,484	55,591	55,698	56,023	56,240	56,564	56,888	57,213	57,646	58,083	58,522	58,966	59,413	59,863
Elmb.	73,930	75,386	76,322	76,946	77,466	78,089	78,609	79,233	79,844	80,323	80,802	81,178	81,592	81,903	82,213	82,627	83,042	83,560	84,182	84,803	85,425	86,047	86,673	87,304	87,939	88,579	89,224
Ep. & Ew.	44,320	45,483	46,258	46,775	47,421	47,808	48,325	48,713	49,183	49,628	50,073	50,518	50,905	51,162	51,548	51,805	52,191	52,707	53,093	53,607	54,122	54,637	55,157	55,682	56,212	56,746	57,287
Horsham	79,794	81,352	82,310	82,909	83,388	83,987	84,467	84,826	85,474	85,798	86,243	86,807	87,164	87,521	87,998	88,355	88,832	89,429	90,022	90,734	91,447	92,160	92,879	93,603	94,333	95,069	95,811
Lewes	50,573	51,612	52,190	52,652	52,883	53,229	53,575	53,806	54,151	54,461	54,772	54,967	55,196	55,310	55,539	55,653	55,997	56,341	56,570	56,913	57,372	57,716	58,062	58,409	58,759	59,112	59,466
Mid Sus.	84,115	85,700	86,675	87,163	87,650	88,138	88,626	88,869	89,409	89,742	90,075	90,407	90,527	90,647	90,767	90,887	91,129	91,493	91,853	92,213	92,572	93,054	93,538	94,025	94,515	95,007	95,501
Mole Val.	47,342	48,282	48,965	49,393	49,735	50,076	50,418	50,760	51,191	51,511	51,831	52,236	52,491	52,746	53,002	53,257	53,598	54,025	54,364	54,790	55,300	55,726	56,154	56,586	57,022	57,460	57,902
R. & Ban.	84,106	86,159	87,597	88,521	89,446	90,370	91,191	91,910	93,002	94,017	95,031	96,045	96,865	97,685	98,505	99,325	100,248	101,273	102,397	103,521	104,748	105,975	107,217	108,473	109,744	111,031	112,332
Tandr.	47,819	48,837	49,473	49,981	50,363	50,744	51,126	51,507	51,897	52,247	52,597	52,947	53,200	53,453	53,579	53,704	53,957	54,337	54,588	54,967	55,345	55,724	56,105	56,489	56,875	57,264	57,656
Wealden	83,160	85,047	86,125	86,799	87,473	88,012	88,551	89,091	89,669	90,196	90,588	91,115	91,517	91,783	92,185	92,452	92,853	93,389	93,924	94,459	95,129	95,664	96,202	96,743	97,287	97,834	98,385
Worthing	59,282	61,075	62,130	62,868	63,501	64,134	64,767	65,400	66,031	66,527	67,022	67,623	68,043	68,569	69,095	69,516	70,042	70,673	71,304	72,040	72,670	73,406	74,150	74,901	75,660	76,426	77,201
Study Area	**1,326,030**	**1,354,087**	**1,372,702**	**1,384,842**	**1,395,346**	**1,405,830**	**1,415,665**	**1,425,012**	**1,436,404**	**1,446,094**	**1,455,782**	**1,465,587**	**1,473,197**	**1,480,260**	**1,487,892**	**1,494,674**	**1,503,823**	**1,514,765**	**1,525,486**	**1,537,637**	**1,550,376**	**1,563,050**	**1,575,836**	**1,588,733**	**1,601,745**	**1,614,870**	**1,628,112**
FEMA	231,531	236,242	238,894	240,373	241,732	243,210	244,569	245,499	247,382	248,634	250,070	251,561	252,367	253,237	254,162	255,033	256,145	257,695	259,165	260,819	262,540	264,382	266,238	268,107	269,991	271,889	273,801
LMA	1,143,392	1,167,582	1,183,654	1,194,154	1,202,993	1,212,050	1,220,431	1,228,351	1,238,175	1,246,641	1,255,020	1,263,622	1,270,099	1,276,346	1,282,950	1,288,730	1,296,662	1,306,073	1,315,290	1,325,807	1,336,829	1,347,786	1,358,840	1,369,993	1,381,244	1,392,596	1,404,048

Source: Lichfields using PopGroup.

Table A8.12: Scenario 7a: Experian with Project - Population forecast

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047
Adur	64,500	65,630	66,553	66,949	67,344	67,717	68,091	68,467	68,793	69,336	69,709	70,137	70,487	70,808	71,372	71,774	72,408	72,899	73,178	73,829	74,274	74,733	75,219	75,737	76,253	76,844	77,491
Arun	164,800	167,524	169,235	170,565	171,620	172,378	173,223	174,017	174,981	176,138	177,035	178,021	178,819	179,349	180,081	180,781	181,651	182,156	182,645	182,969	183,568	184,237	184,970	185,803	186,710	187,791	189,036
B'n & H	277,500	284,600	288,814	291,426	293,864	296,194	298,529	301,064	303,958	306,957	310,124	313,057	315,564	317,937	320,512	322,606	325,332	328,169	331,072	333,877	337,084	340,357	343,808	347,368	350,969	354,838	358,793
Chich.	124,500	126,993	128,873	130,165	131,281	132,190	133,137	134,087	135,349	136,283	137,371	138,501	139,471	140,255	141,170	142,070	143,055	143,850	144,660	145,299	146,131	147,005	147,903	148,835	149,862	151,042	152,392
Crawley	118,200	120,703	122,047	122,871	123,636	124,257	124,920	125,411	126,597	127,613	128,744	129,761	130,451	131,145	131,776	132,616	133,412	134,378	135,230	136,157	137,237	138,313	139,513	140,807	142,129	143,595	145,091
Croydon	390,500	396,364	402,603	407,314	410,674	413,973	417,124	420,356	424,259	427,608	431,174	434,837	437,995	440,992	444,040	447,143	450,383	453,515	456,996	460,811	464,924	468,884	473,038	477,482	481,977	486,887	492,107
E'bourne	101,800	104,055	105,524	106,674	107,548	108,492	109,256	110,103	110,898	111,720	112,562	113,257	114,038	114,779	115,346	115,929	116,864	117,404	118,111	118,729	119,405	120,251	121,153	122,102	123,102	124,209	125,406
Elmb.	138,600	141,359	143,168	144,381	145,348	146,283	147,019	147,988	148,905	149,788	150,560	151,293	152,120	152,714	153,394	154,266	155,157	156,071	157,111	158,126	159,198	160,373	161,592	162,879	164,170	165,638	167,265
Ep. & Ew.	80,900	83,011	84,518	85,557	86,687	87,376	88,246	88,937	89,711	90,462	91,189	91,992	92,645	93,106	93,812	94,350	95,082	95,928	96,591	97,433	98,330	99,253	100,258	101,339	102,429	103,591	104,839
Horsham	146,600	149,341	151,185	152,482	153,425	154,546	155,437	156,233	157,545	158,393	159,487	160,763	161,627	162,381	163,357	164,142	165,061	165,870	166,683	167,562	168,461	169,431	170,470	171,598	172,769	174,107	175,621
Lewes	99,800	101,524	102,611	103,535	103,890	104,411	104,986	105,368	106,044	106,808	107,425	108,020	108,638	108,988	109,579	109,967	110,677	111,197	111,519	111,960	112,606	113,096	113,568	114,128	114,706	115,394	116,210
Mid Sus.	152,100	154,866	156,719	157,814	158,699	159,344	159,992	160,437	161,395	162,042	162,714	163,447	163,829	164,158	164,582	164,993	165,603	166,158	166,741	167,168	167,678	168,400	169,197	170,130	171,078	172,163	173,459
Mole Val.	87,500	88,888	89,840	90,482	90,912	91,303	91,695	92,118	92,794	93,344	93,946	94,685	95,240	95,715	96,233	96,815	97,485	98,138	98,684	99,295	100,094	100,780	101,500	102,247	103,018	103,873	104,801
R. & Ban.	151,000	154,573	157,205	158,948	160,614	162,079	163,435	164,577	166,457	168,195	169,935	171,716	173,222	174,618	176,088	177,616	179,302	180,950	182,790	184,544	186,526	188,593	190,811	193,145	195,517	198,080	200,829
Tandr.	87,900	89,634	90,758	91,635	92,259	92,889	93,464	94,070	94,780	95,396	96,060	96,758	97,325	97,777	98,057	98,358	98,818	99,380	99,687	100,163	100,641	101,165	101,732	102,357	103,045	103,808	104,664
Wealden	160,100	163,414	165,555	167,082	168,356	169,248	170,270	171,398	172,706	173,972	175,033	176,268	177,327	178,027	179,023	179,746	180,627	181,425	182,131	182,649	183,389	183,992	184,645	185,336	186,139	187,135	188,345
Worthing	111,300	114,232	116,082	117,475	118,549	119,717	120,872	122,100	123,397	124,557	125,672	127,014	128,122	129,325	130,502	131,583	132,769	133,980	135,151	136,371	137,480	138,751	140,093	141,492	142,957	144,536	146,199
Study Area	**2,457,600**	**2,506,710**	**2,541,290**	**2,565,355**	**2,584,706**	**2,602,395**	**2,619,695**	**2,636,732**	**2,658,571**	**2,678,612**	**2,698,737**	**2,719,528**	**2,736,919**	**2,752,075**	**2,768,925**	**2,784,756**	**2,803,685**	**2,821,468**	**2,838,982**	**2,856,940**	**2,877,026**	**2,897,612**	**2,919,475**	**2,942,786**	**2,966,827**	**2,993,530**	**3,022,549**
FEMA	416,900	424,910	429,951	433,167	435,761	438,147	440,349	442,081	445,538	448,047	450,944	453,971	455,907	457,683	459,716	461,752	464,075	466,406	468,654	470,887	473,376	476,144	479,181	482,535	485,976	489,865	494,171
LMA	2,113,600	2,155,347	2,184,731	2,205,252	2,221,391	2,236,546	2,251,293	2,265,719	2,284,606	2,302,079	2,319,618	2,337,742	2,352,684	2,365,999	2,380,548	2,394,070	2,410,391	2,425,620	2,440,619	2,456,082	2,473,367	2,490,981	2,509,721	2,529,734	2,550,367	2,573,260	2,598,052

Source: Lichfields using PopGroup

Table A8.13: Scenario 7a: Experian with Project - Dwelling forecast

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047
Adur	29,121	29,621	30,055	30,284	30,507	30,720	30,974	31,225	31,451	31,755	31,998	32,270	32,512	32,728	33,044	33,292	33,625	33,902	34,083	34,415	34,677	34,956	35,228	35,502	35,770	36,066	36,383
Arun	77,385	78,867	79,965	80,860	81,626	82,257	82,961	83,620	84,339	85,143	85,851	86,616	87,266	87,814	88,453	89,078	89,761	90,285	90,799	91,205	91,772	92,359	92,938	93,522	94,112	94,756	95,453
B'n & H	128,391	130,464	131,764	132,755	133,648	134,592	135,497	136,589	137,821	139,118	140,465	141,868	143,166	144,408	145,725	146,964	148,415	149,930	151,469	153,004	154,650	156,348	158,068	159,774	161,493	163,327	165,183
Chich.	59,682	60,956	61,996	62,808	63,529	64,159	64,806	65,462	66,231	66,856	67,552	68,275	68,946	69,559	70,207	70,865	71,570	72,203	72,819	73,345	73,947	74,578	75,186	75,781	76,378	77,036	77,744
Crawley	47,598	48,714	49,415	49,946	50,446	50,919	51,420	51,838	52,531	53,154	53,835	54,490	54,980	55,492	55,952	56,487	57,001	57,561	58,077	58,600	59,189	59,784	60,410	61,050	61,688	62,376	63,070
Croydon	158,558	161,402	164,355	166,807	168,794	170,805	172,819	174,769	176,922	178,881	180,898	182,918	184,782	186,527	188,301	190,085	191,923	193,657	195,511	197,434	199,522	201,598	203,712	205,856	207,987	210,284	212,662
E'bourne	48,983	50,105	50,903	51,593	52,154	52,776	53,321	53,893	54,448	55,031	55,627	56,161	56,740	57,284	57,747	58,223	58,832	59,275	59,770	60,230	60,727	61,282	61,855	62,423	62,999	63,613	64,254
Elmb.	58,112	59,325	60,263	60,999	61,666	62,314	62,913	63,582	64,233	64,898	65,555	66,161	66,776	67,277	67,815	68,415	68,992	69,557	70,150	70,720	71,314	71,961	72,592	73,225	73,856	74,546	75,291
Ep. & Ew.	32,492	33,252	33,868	34,341	34,847	35,204	35,635	36,030	36,446	36,858	37,262	37,685	38,071	38,385	38,764	39,094	39,480	39,889	40,224	40,620	41,046	41,481	41,945	42,417	42,892	43,396	43,925
Horsham	63,495	64,810	65,843	66,628	67,289	67,990	68,644	69,228	70,009	70,595	71,298	72,045	72,625	73,159	73,772	74,338	74,925	75,463	75,981	76,510	77,078	77,675	78,270	78,870	79,469	80,128	80,840
Lewes	45,250	46,093	46,706	47,248	47,565	47,959	48,381	48,708	49,152	49,639	50,077	50,478	50,872	51,169	51,565	51,875	52,310	52,674	52,952	53,261	53,660	53,997	54,310	54,630	54,951	55,307	55,704
Mid Sus.	63,830	65,126	66,114	66,840	67,466	68,007	68,554	69,034	69,714	70,277	70,853	71,405	71,820	72,215	72,627	73,033	73,489	73,946	74,376	74,744	75,156	75,647	76,148	76,664	77,165	77,714	78,325
Mole Val.	38,588	39,145	39,602	39,937	40,194	40,436	40,711	40,991	41,362	41,699	42,037	42,427	42,729	43,007	43,306	43,621	43,969	44,302	44,593	44,906	45,303	45,666	46,026	46,380	46,731	47,127	47,541
R. & Ban.	61,457	62,955	64,151	65,013	65,851	66,632	67,428	68,134	69,094	70,004	70,942	71,909	72,743	73,554	74,388	75,213	76,097	76,951	77,845	78,688	79,642	80,642	81,665	82,714	83,762	84,884	86,059
Tandr.	36,686	37,483	38,050	38,516	38,873	39,249	39,615	40,013	40,422	40,800	41,211	41,624	41,994	42,321	42,571	42,829	43,143	43,482	43,726	44,001	44,296	44,610	44,920	45,235	45,559	45,912	46,296
Wealden	71,184	72,798	74,007	74,912	75,720	76,401	77,131	77,903	78,703	79,465	80,141	80,888	81,586	82,155	82,809	83,372	83,967	84,518	85,046	85,478	86,019	86,508	86,980	87,442	87,919	88,456	89,056
Worthing	52,070	53,511	54,496	55,271	55,898	56,591	57,299	58,017	58,770	59,451	60,133	60,903	61,571	62,274	62,959	63,614	64,276	64,966	65,643	66,335	66,997	67,726	68,473	69,228	69,989	70,798	71,627
Study Area	**1,072,882**	**1,094,626**	**1,111,550**	**1,124,759**	**1,136,075**	**1,147,010**	**1,158,111**	**1,169,037**	**1,181,648**	**1,193,625**	**1,205,735**	**1,218,123**	**1,229,178**	**1,239,327**	**1,250,005**	**1,260,398**	**1,271,775**	**1,282,563**	**1,293,066**	**1,303,495**	**1,314,996**	**1,326,817**	**1,338,726**	**1,350,714**	**1,362,723**	**1,375,727**	**1,389,413**
FEMA	174,923	178,650	181,371	183,414	185,201	186,916	188,618	190,100	192,254	194,026	195,987	197,939	199,425	200,865	202,351	203,858	205,415	206,971	208,433	209,854	211,423	213,106	214,827	216,584	218,322	220,218	222,234
LMA	922,596	941,093	955,423	966,611	976,032	985,333	994,757	1,003,964	1,014,739	1,025,013	1,035,366	1,046,001	1,055,385	1,064,106	1,073,219	1,082,024	1,091,733	1,100,914	1,109,872	1,118,811	1,128,689	1,138,797	1,149,003	1,159,291	1,169,597	1,180,748	1,192,454

Source: Lichfields using PopGroup

Scenario 9a: Standard Method Housing

Table A8.14: Scenario 9a: Standard Method - Dwelling forecast

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047
Adur	29,121	29,328	29,576	29,823	30,071	30,319	30,567	30,815	31,062	31,310	31,558	31,806	32,054	32,301	32,549	32,797	33,045	33,293	33,540	33,788	34,036	34,284	34,532	34,779	35,027	35,275	35,523
Arun	77,385	77,935	79,228	80,580	81,932	83,283	84,635	85,987	87,339	88,691	90,043	91,395	92,747	94,099	95,451	96,802	98,154	99,506	100,858	102,210	103,562	104,914	106,266	107,618	108,970	110,321	111,673
B'n & H	128,391	130,719	133,046	135,374	137,702	140,029	142,357	144,685	147,013	149,340	151,668	153,996	156,324	158,651	160,979	163,307	165,634	167,962	170,290	172,618	174,945	177,273	179,601	181,929	184,256	186,584	188,912
Chich.	59,682	60,445	61,208	61,971	62,734	63,498	64,261	65,024	65,787	66,550	67,313	68,076	68,840	69,603	70,366	71,129	71,892	72,655	73,418	74,182	74,945	75,708	76,471	77,234	77,997	78,760	79,524
Crawley	47,598	48,345	49,093	49,840	50,588	51,335	52,083	52,830	53,578	54,325	55,073	55,820	56,568	57,315	58,063	58,810	59,558	60,305	61,053	61,800	62,548	63,295	64,043	64,790	65,538	66,285	67,033
Croydon	158,558	161,198	163,838	166,478	167,407	171,336	175,265	179,195	183,124	187,053	190,983	194,912	198,841	202,771	206,700	210,629	214,559	218,488	222,417	226,346	230,276	234,205	238,134	242,064	245,993	249,922	253,852
E'bourne	48,983	49,721	50,459	51,197	51,935	52,673	53,411	54,149	54,887	55,626	56,364	57,102	57,840	58,578	59,316	60,054	60,792	61,530	62,268	63,006	63,744	64,482	65,220	65,958	66,696	67,434	68,172
Elmb.	58,112	58,759	59,406	60,052	60,699	61,345	61,992	62,638	63,285	63,931	64,578	65,224	65,871	66,517	67,164	67,810	68,457	69,103	69,750	70,396	71,043	71,689	72,336	72,982	73,629	74,275	74,922
Ep. & Ew.	32,492	33,068	33,644	34,221	34,797	35,373	35,949	36,525	37,101	37,677	38,253	38,829	39,405	39,982	40,558	41,134	41,710	42,286	42,862	43,438	44,014	44,590	45,166	45,743	46,319	46,895	47,471
Horsham	63,495	64,443	65,390	66,338	67,286	68,233	69,181	70,128	71,076	72,023	72,971	73,919	74,866	75,814	76,761	77,709	78,656	79,604	80,552	81,499	82,447	83,394	84,342	85,290	86,237	87,185	88,132
Lewes	45,250	46,033	46,816	47,599	48,382	49,165	49,948	50,731	51,513	52,296	53,079	53,862	54,645	55,428	56,211	56,994	57,776	58,559	59,342	60,125	60,908	61,691	62,474	63,257	64,039	64,822	65,605
Mid Sus.	63,830	65,123	66,242	67,361	68,480	69,600	70,719	71,838	72,957	74,076	75,196	76,315	77,434	78,553	79,673	80,792	81,911	83,030	84,149	85,269	86,388	87,507	88,626	89,746	90,865	91,984	93,103
Mole Val.	38,588	39,046	39,503	39,961	40,418	40,876	41,333	41,791	42,248	42,706	43,164	43,621	44,079	44,536	44,994	45,451	45,909	46,366	46,824	47,281	47,739	48,196	48,654	49,111	49,569	50,026	50,484
R. & Ban.	61,457	62,039	62,622	63,205	63,849	64,493	65,137	65,781	66,425	67,069	67,713	68,357	69,001	69,645	70,289	70,933	71,577	72,221	72,865	73,509	74,153	74,797	75,441	76,085	76,729	77,373	78,017
Tandr.	36,686	37,328	37,970	38,612	39,254	39,896	40,538	41,181	41,823	42,465	43,107	43,749	44,391	45,033	45,675	46,317	46,959	47,601	48,243	48,885	49,527	50,169	50,811	51,453	52,095	52,737	53,379
Wealden	71,184	72,396	73,609	74,821	76,033	77,245	78,457	79,669	80,881	82,093	83,305	84,518	85,730	86,942	88,154	89,366	90,578	91,790	93,002	94,215	95,427	96,639	97,851	99,063	100,275	101,487	102,699
Worthing	52,070	52,964	53,859	54,753	55,648	56,542	57,437	58,331	59,226	60,120	61,015	61,909	62,803	63,698	64,592	65,487	66,381	67,276	68,170	69,065	69,959	70,854	71,748	72,643	73,537	74,431	75,326
Study Area	**1,072,882**	**1,088,891**	**1,105,509**	**1,122,186**	**1,137,214**	**1,155,242**	**1,173,270**	**1,191,298**	**1,209,326**	**1,227,353**	**1,245,381**	**1,263,409**	**1,281,437**	**1,299,465**	**1,317,493**	**1,335,521**	**1,353,549**	**1,371,576**	**1,389,604**	**1,407,632**	**1,425,660**	**1,443,688**	**1,461,716**	**1,479,744**	**1,497,772**	**1,515,799**	**1,533,827**

Source: Lichfields using PopGroup. *May not match dwelling trajectories precisely due to rounding and model functionality.

Table A8.15: Scenario 9a: Standard Method - Population forecast

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047
Adur	64,500	64,881	65,348	65,808	66,281	66,753	67,122	67,495	67,883	68,286	68,679	69,051	69,423	69,833	70,228	70,638	71,065	71,494	71,952	72,400	72,822	73,212	73,651	74,112	74,589	75,072	75,556
Arun	164,800	165,297	167,534	169,968	172,399	174,826	177,134	179,484	181,834	184,170	186,466	188,706	191,022	193,294	195,534	197,765	200,023	202,279	204,525	206,850	209,048	211,275	213,588	215,992	218,455	220,963	223,515
B'n & H	277,500	285,280	292,237	298,288	304,310	309,988	315,743	321,095	326,403	331,653	336,946	341,838	346,605	351,390	356,136	360,584	365,046	369,474	373,928	378,301	382,780	387,206	391,798	396,569	401,343	406,064	410,841
Chich.	124,500	125,691	126,930	128,176	129,451	130,730	131,976	133,191	134,422	135,704	136,941	138,150	139,338	140,484	141,659	142,788	143,880	144,973	146,117	147,303	148,477	149,621	150,848	152,142	153,520	154,898	156,330
Crawley	118,200	119,694	121,189	122,614	124,053	125,404	126,715	128,072	129,355	130,669	131,941	133,173	134,532	135,825	137,188	138,547	139,914	141,324	142,739	144,206	145,641	147,057	148,520	150,040	151,597	153,160	154,740
Croydon	390,500	395,781	401,142	406,422	406,762	415,643	424,175	432,872	441,575	450,239	458,854	467,485	475,999	484,662	493,244	501,786	510,244	518,867	527,464	536,188	544,684	553,015	561,415	570,025	578,700	587,287	595,939
E'bourne	101,800	103,153	104,507	105,791	107,091	108,304	109,512	110,732	111,933	113,088	114,230	115,371	116,487	117,640	118,805	119,945	121,122	122,291	123,500	124,698	125,860	127,059	128,279	129,564	130,879	132,217	133,587
Elmb.	138,600	139,736	140,781	141,808	142,770	143,744	144,656	145,590	146,519	147,366	148,131	149,003	149,936	150,962	151,944	152,937	154,019	155,157	156,337	157,561	158,768	159,933	161,199	162,525	163,861	165,210	166,569
Ep. & Ew.	80,900	82,444	83,855	85,230	86,577	87,939	89,226	90,442	91,661	92,862	94,061	95,264	96,432	97,624	98,839	100,038	101,241	102,492	103,791	105,073	106,319	107,565	108,813	110,117	111,423	112,710	114,014
Horsham	146,600	148,346	149,993	151,753	153,477	155,243	156,902	158,640	160,334	162,096	163,760	165,497	167,267	169,035	170,798	172,491	174,253	176,031	177,858	179,714	181,478	183,235	185,072	186,982	188,938	190,901	192,905
Lewes	99,800	101,370	102,902	104,438	105,971	107,445	108,888	110,371	111,830	113,261	114,670	116,152	117,656	119,134	120,587	122,052	123,505	124,952	126,408	127,896	129,352	130,806	132,300	133,863	135,440	137,034	138,652
Mid Sus.	152,100	154,858	157,077	159,254	161,469	163,653	165,797	167,901	169,938	171,988	174,003	176,137	178,284	180,409	182,560	184,694	186,883	188,994	191,210	193,425	195,580	197,717	199,911	202,203	204,547	206,889	209,278
Mole Val.	87,500	88,618	89,581	90,566	91,540	92,502	93,364	94,238	95,106	95,948	96,833	97,711	98,652	99,572	100,467	101,378	102,289	103,223	104,165	105,107	106,007	106,894	107,825	108,800	109,803	110,771	111,765
R. & Ban.	151,000	152,022	153,030	154,087	155,288	156,438	157,433	158,483	159,537	160,602	161,597	162,568	163,653	164,683	165,723	166,847	167,966	169,139	170,388	171,699	172,931	174,142	175,450	176,809	178,210	179,609	181,059
Tandr.	87,900	89,198	90,551	91,918	93,324	94,668	95,976	97,217	98,514	99,804	101,035	102,293	103,536	104,772	106,043	107,290	108,536	109,812	111,092	112,443	113,734	115,017	116,358	117,741	119,161	120,576	121,996
Wealden	160,100	162,356	164,539	166,887	169,212	171,463	173,686	175,887	178,180	180,519	182,863	185,176	187,436	189,658	191,931	194,158	196,445	198,758	201,022	203,331	205,559	207,776	210,090	212,461	214,898	217,371	219,898
Worthing	111,300	112,958	114,621	116,311	118,017	119,648	121,228	122,852	124,458	126,097	127,678	129,282	130,893	132,509	134,143	135,746	137,436	139,085	140,724	142,378	143,984	145,596	147,243	148,933	150,673	152,419	154,203
Study Area	**2,457,600**	**2,491,683**	**2,525,817**	**2,559,318**	**2,587,990**	**2,624,390**	**2,659,532**	**2,694,562**	**2,729,482**	**2,764,354**	**2,798,686**	**2,832,856**	**2,867,154**	**2,901,486**	**2,935,829**	**2,969,685**	**3,003,865**	**3,038,346**	**3,073,223**	**3,108,572**	**3,143,022**	**3,177,125**	**3,212,358**	**3,248,877**	**3,286,037**	**3,323,150**	**3,360,848**

Source: Lichfields using PopGroup

Table A8.16: Scenario 9a: Standard Method – Labour supply forecast

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047
Adur	33,632	33,837	34,100	34,429	34,766	35,113	35,390	35,669	35,927	36,167	36,376	36,535	36,690	36,887	37,051	37,196	37,339	37,578	37,831	38,110	38,369	38,600	38,847	39,092	39,350	39,568	39,754
Arun	82,075	82,069	83,171	84,320	85,623	86,934	88,098	89,293	90,365	91,249	92,256	93,161	94,101	95,014	95,926	96,840	97,815	99,023	100,221	101,572	102,829	104,060	105,304	106,541	107,772	108,919	109,991
B'n & H	159,220	164,287	168,784	172,825	176,875	180,764	184,492	187,989	191,296	194,448	197,485	200,305	203,044	205,881	208,543	211,046	213,598	216,341	219,041	221,857	224,560	227,285	230,016	232,816	235,626	238,240	240,864
Chich.	64,389	64,804	65,245	65,741	66,368	67,044	67,668	68,261	68,734	69,256	69,730	70,157	70,619	71,085	71,564	72,022	72,482	73,148	73,831	74,647	75,413	76,132	76,892	77,678	78,460	79,150	79,771
Crawley	67,622	68,508	69,340	70,150	71,001	71,883	72,697	73,586	74,312	75,073	75,790	76,496	77,243	78,004	78,785	79,479	80,207	81,046	81,888	82,780	83,613	84,439	85,217	85,978	86,758	87,451	88,146
Croydon	214,238	216,876	219,649	222,391	222,094	227,349	232,303	237,257	242,033	246,789	251,324	255,932	260,415	265,060	269,584	274,016	278,444	283,374	288,196	293,215	297,891	302,395	306,840	311,257	315,721	319,872	323,900
E'bourne	50,413	50,958	51,551	52,081	52,674	53,277	53,872	54,417	54,959	55,424	55,865	56,283	56,672	57,106	57,538	57,941	58,369	58,921	59,501	60,126	60,691	61,288	61,865	62,457	63,041	63,578	64,086
Elmb.	73,930	74,332	74,791	75,332	75,889	76,576	77,240	77,865	78,501	78,972	79,458	79,933	80,423	81,015	81,517	81,998	82,519	83,165	83,852	84,582	85,265	85,855	86,488	87,125	87,775	88,327	88,794
Ep. & Ew.	44,320	45,109	45,824	46,572	47,368	48,201	48,989	49,710	50,455	51,173	51,901	52,579	53,271	53,973	54,653	55,298	55,943	56,674	57,424	58,176	58,864	59,538	60,163	60,783	61,407	61,980	62,515
Horsham	79,794	80,696	81,532	82,449	83,454	84,483	85,463	86,424	87,295	88,187	88,963	89,780	90,680	91,646	92,572	93,453	94,404	95,563	96,739	98,011	99,207	100,352	101,507	102,658	103,821	104,880	105,856
Lewes	50,573	51,516	52,376	53,222	54,189	55,115	55,974	56,856	57,638	58,305	59,049	59,732	60,442	61,187	61,870	62,570	63,286	64,130	64,987	65,908	66,792	67,662	68,569	69,461	70,352	71,179	71,935
Mid Sus.	84,115	85,694	86,917	88,129	89,492	90,980	92,419	93,703	94,872	96,047	97,171	98,325	99,503	100,694	101,821	102,936	104,068	105,317	106,609	108,014	109,317	110,587	111,845	113,076	114,340	115,506	116,556
Mole Val.	47,342	48,103	48,796	49,454	50,159	50,878	51,521	52,145	52,680	53,166	53,644	54,111	54,593	55,114	55,588	56,026	56,488	57,067	57,635	58,246	58,788	59,313	59,851	60,405	60,966	61,451	61,908
R. & Ban.	84,106	84,473	84,857	85,382	86,064	86,844	87,490	88,206	88,807	89,428	90,002	90,537	91,139	91,773	92,364	92,970	93,569	94,326	95,100	95,966	96,733	97,434	98,123	98,794	99,494	100,095	100,638
Tandr.	47,819	48,556	49,342	50,171	51,056	51,890	52,726	53,494	54,231	54,979	55,655	56,321	56,963	57,672	58,384	59,062	59,758	60,538	61,356	62,238	63,078	63,882	64,695	65,497	66,285	67,020	67,699
Wealden	83,160	84,389	85,500	86,697	88,031	89,415	90,683	91,855	93,000	94,137	95,261	96,383	97,447	98,568	99,662	100,754	101,915	103,286	104,677	106,219	107,705	109,131	110,586	112,052	113,490	114,820	116,045
Worthing	59,282	60,258	61,205	62,152	63,202	64,139	65,042	65,922	66,740	67,526	68,299	69,039	69,752	70,507	71,287	71,998	72,800	73,668	74,550	75,517	76,419	77,328	78,222	79,116	80,011	80,844	81,661
Study Area	**1,326,030**	**1,344,463**	**1,362,981**	**1,381,496**	**1,398,305**	**1,420,884**	**1,442,066**	**1,462,653**	**1,481,843**	**1,500,326**	**1,518,229**	**1,535,609**	**1,552,996**	**1,571,187**	**1,588,710**	**1,605,604**	**1,623,006**	**1,643,166**	**1,663,439**	**1,685,184**	**1,705,534**	**1,725,280**	**1,745,028**	**1,764,785**	**1,784,668**	**1,802,879**	**1,820,120**

Source: Lichfields using PopGroup

Table A8.17: Scenario 9a: Standard Method – Job forecast

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047
Adur	26,400	26,561	26,768	27,026	27,290	27,563	27,780	27,999	28,202	28,391	28,554	28,679	28,801	28,955	29,084	29,198	29,311	29,498	29,697	29,915	30,119	30,300	30,494	30,686	30,889	31,060	31,206
Arun	53,700	53,696	54,417	55,169	56,022	56,879	57,640	58,423	59,124	59,702	60,361	60,953	61,569	62,166	62,762	63,361	63,998	64,789	65,572	66,457	67,279	68,084	68,898	69,707	70,513	71,263	71,965
B'n & H	164,900	170,147	174,805	178,990	183,184	187,212	191,073	194,695	198,119	201,384	204,529	207,450	210,287	213,225	215,982	218,574	221,218	224,058	226,855	229,771	232,570	235,392	238,221	241,120	244,031	246,738	249,456
Chich.	76,200	76,692	77,213	77,800	78,543	79,343	80,081	80,783	81,342	81,960	82,522	83,027	83,573	84,125	84,692	85,233	85,779	86,567	87,374	88,340	89,246	90,097	90,997	91,927	92,853	93,669	94,405
Crawley	100,400	101,715	102,951	104,153	105,417	106,726	107,935	109,255	110,333	111,463	112,527	113,575	114,684	115,814	116,974	118,004	119,085	120,331	121,581	122,905	124,142	125,369	126,523	127,654	128,811	129,840	130,873
Croydon	148,600	150,429	152,353	154,255	154,049	157,694	161,130	164,566	167,879	171,178	174,323	177,520	180,629	183,851	186,989	190,063	193,134	196,554	199,899	203,380	206,623	209,747	212,831	215,894	218,991	221,870	224,664
E'bourne	47,000	47,508	48,060	48,554	49,108	49,670	50,225	50,733	51,238	51,671	52,083	52,472	52,835	53,239	53,643	54,018	54,417	54,931	55,472	56,055	56,582	57,138	57,676	58,228	58,773	59,273	59,747
Elmb.	68,900	69,274	69,703	70,206	70,726	71,365	71,984	72,567	73,159	73,599	74,052	74,495	74,951	75,503	75,970	76,418	76,905	77,506	78,147	78,827	79,464	80,013	80,604	81,197	81,802	82,317	82,753
Ep. & Ew.	36,600	37,252	37,842	38,460	39,117	39,805	40,456	41,051	41,667	42,260	42,861	43,420	43,992	44,572	45,133	45,666	46,199	46,802	47,422	48,042	48,611	49,167	49,684	50,195	50,711	51,184	51,626
Horsham	68,600	69,375	70,094	70,883	71,746	72,631	73,473	74,300	75,049	75,816	76,483	77,185	77,959	78,790	79,585	80,343	81,161	82,157	83,168	84,261	85,290	86,274	87,267	88,257	89,256	90,166	91,006
Lewes	47,500	48,385	49,193	49,988	50,896	51,766	52,572	53,401	54,136	54,762	55,461	56,102	56,769	57,469	58,111	58,768	59,440	60,233	61,038	61,903	62,733	63,550	64,402	65,240	66,076	66,853	67,563
Mid Sus.	70,100	71,416	72,435	73,445	74,581	75,821	77,020	78,090	79,065	80,044	80,980	81,942	82,924	83,916	84,856	85,785	86,729	87,770	88,846	90,017	91,103	92,161	93,210	94,235	95,289	96,261	97,136
Mole Val.	53,000	53,853	54,628	55,364	56,154	56,959	57,678	58,377	58,976	59,520	60,056	60,579	61,118	61,701	62,232	62,722	63,240	63,888	64,524	65,208	65,814	66,402	67,004	67,624	68,253	68,795	69,307
R. & Ban.	76,200	76,533	76,881	77,356	77,974	78,681	79,267	79,915	80,460	81,022	81,543	82,027	82,572	83,147	83,682	84,231	84,774	85,460	86,161	86,945	87,640	88,275	88,900	89,508	90,142	90,687	91,179
Tandr.	38,300	38,890	39,520	40,184	40,892	41,560	42,230	42,845	43,435	44,035	44,576	45,109	45,623	46,192	46,762	47,305	47,862	48,487	49,142	49,848	50,521	51,165	51,816	52,459	53,090	53,678	54,222
Wealden	62,400	63,322	64,156	65,054	66,055	67,093	68,045	68,925	69,783	70,636	71,480	72,322	73,120	73,962	74,782	75,602	76,473	77,502	78,546	79,702	80,818	81,887	82,979	84,079	85,158	86,156	87,075
Worthing	59,100	60,073	61,018	61,961	63,008	63,942	64,842	65,720	66,535	67,318	68,089	68,827	69,537	70,291	71,069	71,777	72,576	73,442	74,321	75,286	76,184	77,090	77,982	78,873	79,765	80,596	81,410
Study Area	**1,197,900**	**1,215,120**	**1,232,036**	**1,248,848**	**1,264,762**	**1,284,710**	**1,303,433**	**1,321,645**	**1,338,500**	**1,354,761**	**1,370,479**	**1,385,685**	**1,400,943**	**1,416,917**	**1,432,308**	**1,447,067**	**1,462,299**	**1,479,974**	**1,497,763**	**1,516,864**	**1,534,740**	**1,552,115**	**1,569,486**	**1,586,885**	**1,604,403**	**1,620,408**	**1,635,592**

Source: Lichfields using PopGroup

Table A8.18: Difference in labour supply between Experian forecast with Project and standard method housing scenarios by local authority

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047
Adur	0	-478	-762	-706	-643	-569	-566	-560	-439	-472	-400	-378	-359	-299	-409	-400	-531	-565	-449	-580	-594	-637	-665	-697	-719	-782	-879
Arun	0	-1,364	-1,016	-320	530	1,540	2,402	3,295	4,216	4,949	5,806	6,560	7,349	8,262	9,023	9,786	10,459	11,366	12,262	13,311	14,115	14,894	15,683	16,463	17,234	17,919	18,527
B'n & H	0	451	2,272	4,559	6,948	9,175	11,426	13,262	15,184	16,859	18,420	19,855	21,210	22,662	23,940	25,335	26,318	27,215	28,069	28,946	29,619	30,221	30,806	31,436	32,053	32,450	32,833
Chich.	0	-832	-1,223	-1,226	-1,099	-839	-631	-453	-396	-124	17	112	241	457	603	729	773	940	1,123	1,440	1,624	1,761	1,934	2,128	2,314	2,403	2,418
Crawley	0	-682	-569	-151	308	798	1,220	1,782	2,182	2,616	2,941	3,320	3,741	4,110	4,564	4,866	5,202	5,453	5,772	6,076	6,256	6,429	6,548	6,644	6,754	6,772	6,785
Croydon	0	-366	-914	-543	-2,421	1,094	4,467	7,840	11,193	14,684	17,954	21,140	24,200	27,422	30,523	33,532	36,378	39,411	42,178	44,825	47,129	49,420	51,632	53,796	55,987	57,846	59,561
E'bourne	0	-544	-604	-510	-244	-76	192	410	735	982	1,205	1,514	1,686	1,902	2,225	2,519	2,620	2,955	3,208	3,506	3,745	3,906	4,044	4,194	4,332	4,420	4,476
Elmb.	0	-1,054	-1,531	-1,614	-1,577	-1,513	-1,369	-1,368	-1,252	-1,197	-1,127	-964	-890	-610	-420	-355	-250	-123	-60	46	105	71	76	80	92	1	-179
Ep. & Ew.	0	-374	-434	-203	-53	393	664	997	1,354	1,685	2,025	2,315	2,620	3,063	3,356	3,742	4,000	4,214	4,576	4,811	4,983	5,140	5,243	5,336	5,428	5,464	5,457
Horsham	0	-656	-778	-460	66	496	996	1,598	2,110	2,882	3,418	3,876	4,416	5,023	5,470	5,991	6,463	7,023	7,600	8,153	8,630	9,056	9,487	9,907	10,334	10,651	10,879
Lewes	0	-96	186	570	1,306	1,886	2,399	3,050	3,601	4,037	4,550	5,118	5,597	6,226	6,678	7,263	7,632	8,130	8,756	9,331	9,753	10,276	10,835	11,376	11,915	12,387	12,786
Mid Sus.	0	-6	242	966	1,842	2,842	3,793	4,834	5,759	6,812	7,814	8,846	9,902	10,971	11,976	12,969	13,858	14,741	15,667	16,706	17,644	18,426	19,194	19,932	20,701	21,369	21,918
Mole Val.	0	-179	-169	61	424	802	1,103	1,385	1,578	1,808	2,029	2,155	2,380	2,645	2,863	3,044	3,164	3,316	3,542	3,726	3,755	3,853	3,960	4,080	4,204	4,248	4,261
R. & Ban.	0	-1,686	-2,740	-3,139	-3,382	-3,526	-3,701	-3,704	-3,925	-4,125	-4,373	-4,659	-4,879	-5,066	-5,297	-5,513	-5,838	-6,108	-6,463	-6,727	-7,192	-7,724	-8,282	-8,872	-9,449	-10,140	-10,904
Tandr.	0	-281	-131	190	693	1,146	1,600	1,987	2,469	2,963	3,384	3,796	4,184	4,638	5,223	5,774	6,216	6,614	7,178	7,678	8,137	8,559	8,988	9,403	9,802	10,144	10,428
Wealden	0	-658	-625	-102	558	1,403	2,132	2,764	3,505	4,238	5,092	5,810	6,469	7,321	8,011	8,833	9,590	10,422	11,273	12,276	13,088	13,975	14,888	15,809	16,698	17,477	18,147
Worthing	0	-817	-925	-716	-299	5	275	522	813	1,177	1,528	1,740	2,031	2,259	2,512	2,801	3,075	3,310	3,559	3,788	4,057	4,228	4,376	4,516	4,650	4,714	4,754
Study Area	**0**	**-9,624**	**-9,720**	**-3,345**	**2,957**	**15,056**	**26,401**	**37,642**	**48,685**	**59,774**	**70,283**	**80,156**	**89,897**	**100,987**	**110,842**	**120,915**	**129,131**	**138,315**	**147,792**	**157,312**	**164,854**	**171,853**	**178,745**	**185,530**	**192,329**	**197,342**	**201,269**

Source: Lichfields using PopGroup

Table A8.10: Difference in labour supply between Experian forecast with Project and standard method housing scenarios by housing market area

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047
North West Sussex	0	-1,345	-1,105	355	2,216	4,136	6,009	8,214	10,051	12,311	14,173	16,042	18,059	20,104	22,010	23,826	25,524	27,218	29,039	30,935	32,530	33,911	35,228	36,483	37,789	38,791	39,582
Croydon and East Surrey	0	-2,334	-3,784	-3,492	-5,111	-1,286	2,367	6,123	9,737	13,522	16,965	20,277	23,505	26,994	30,449	33,793	36,756	39,917	42,894	45,776	48,073	50,255	52,338	54,328	56,340	57,851	59,085
Coastal West Sussex	0	-3,137	-1,469	2,162	6,744	11,198	15,304	19,117	22,978	26,426	29,921	33,007	36,069	39,567	42,348	45,514	47,727	50,397	53,320	56,237	58,574	60,743	62,969	65,221	67,446	69,090	70,439
North East Surrey	0	-1,607	-2,134	-1,757	-1,206	-319	398	1,013	1,679	2,296	2,927	3,506	4,109	5,098	5,799	6,430	6,914	7,407	8,058	8,583	8,844	9,064	9,279	9,496	9,724	9,713	9,539
Wealden and Eastbourne	0	-1,202	-1,229	-613	314	1,327	2,324	3,175	4,239	5,220	6,297	7,324	8,155	9,223	10,236	11,352	12,210	13,377	14,481	15,781	16,833	17,881	18,931	20,003	21,030	21,897	22,623
Study Area	**0**	**-9,624**	**-9,720**	**-3,345**	**2,957**	**15,056**	**26,401**	**37,642**	**48,685**	**59,774**	**70,283**	**80,156**	**89,897**	**100,987**	**110,842**	**120,915**	**129,131**	**138,315**	**147,792**	**157,312**	**164,854**	**171,853**	**178,745**	**185,530**	**192,329**	**197,342**	**201,269**