Crawley Economic Growth Assessment Update

Final Report

Crawley Borough Council

25 February 2015

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1.0 Introduction

1.1 Crawley Borough Council ('CBC') commissioned Nathaniel Lichfield & Partners ('NLP') to undertake a partial update of the Northern West Sussex Economic Growth Assessment ('EGA') (dated April 2014) produced by NLP in relation to Crawley Borough. The purpose of this update is to review the estimated requirements for employment floorspace drawing on latest evidence and consider this against the identified future land supply within the Borough.

1.2 The key requirements of the brief were to:

1. Produce updated scenarios of future economic growth needs in Crawley over the Local Plan period 2015-2030, including the latest 'baseline' Experian economic forecasts as well as alternative 'higher growth' and 'site capacity' scenarios (using assumptions that are consistent with the original 2014 EGA).
2. Prepare new estimates of future employment land requirements for the range of B class uses (i.e. offices, industrial and warehousing) in terms of floorspace and land areas for all three growth scenarios.
3. Assess the updated demand/supply balance of employment land in Crawley over the Local Plan period to 2030, including a review of the Borough's Employment Land Trajectory developed by CBC.

Background

1.3 The purpose of the 2014 EGA was to provide an evidence base to inform the emerging Local Plans for the three authorities of Crawley, Horsham and Mid Sussex, and support the development of a partnership approach to joint working across a range of planning policy and economic development issues in line with the National Planning Policy Framework (NPPF) duty to cooperate.

1.4 The EGA included a 'baseline' scenario of future economic growth in Crawley using Experian quarterly forecasts dated May 2013 which will be nearly two years old at the point of the CBCLP Examination in March 2015, alongside 'higher growth' (derived from the baseline) and 'site capacity' scenarios which provide an indication of additional growth potential over and above the baseline scenario.

1.5 The employment land requirements associated with these three scenarios of future growth were estimated at 77.2ha, 87.6ha and 110.1ha respectively for the period between 2011 and 2031. The Submission Crawley 2030 Local Plan notes that due to the Borough's tight administrative boundary and the safeguarding of land for a possible second runway at Gatwick Airport, Crawley is only able to plan towards meeting some of its baseline economic growth potential. Policy EC1 therefore seeks to plan within these constraints and directs economic growth to the Borough's established Main Employment Areas.

1.6 CBC has submitted the Crawley 2030 Local Plan to the Secretary of State for independent examination, with the examination hearing sessions due to take place in March 2015. In advance of the hearing sessions, the Council has commissioned Chilmark Consulting to prepare an Objective Assessment of Crawley's Housing and Economic Needs ('OACHEN') to update the Council's evidence on objectively assessed housing needs and to take account of the findings of the 2014 Northern West Sussex EGA prepared by NLP.

1.7 In order to ensure that the Crawley 2030 Local Plan reflects the most up-to-date evidence on economic development needs, it is necessary to prepare an updated set of scenarios for use as part of the OACHEN. This will also ensure that the objective assessment of both housing and business needs in the Borough are aligned with the latest data available at the time of examination. This includes the forthcoming 2012-based Household Projections for local authority areas which are expected to be released by ONS on 26th February 2015.

1.8 The Crawley EGA update also takes account of a number of data releases, updates and new planning practice guidance that have occurred since the original Northern West Sussex EGA was published in April 2014, including release of the 2011 Census data on travel-to-work patterns, updated West Sussex County Council monitoring data on B class completions and losses in the Borough and CBC's updated Employment Land Trajectory. It also takes account of changes associated with the Council's programme of regeneration, such as the non-progression of retail-led development in Crawley town centre ('Town Centre North') which had previously represented a key driver of additional employment growth in Crawley as part of the 2014 EGA 'alternative higher growth' scenario.

1.9 Given that the Crawley Borough Local Plan covers the 15 year period from 2015 to 2030, the EGA update has prepared updated scenarios of future growth needs that specifically relate to this 15 year plan period. This approach deviates slightly from the original 2014 EGA which considered growth needs over a longer 20-year period 2011-2031 in order to provide consistency across the three commissioning authorities for that study.

Scope of Study

1.10 This Crawley specific EGA update builds upon the partnership approach adopted by the original Northern West Sussex EGA by refreshing/updating the existing evidence base for the Borough (rather than incorporating any new assessment) and taking account of the latest national guidance produced by central government (i.e. the Planning Practice Guidance [PPG]).

1.11 The focus of this report is on the employment space needs for the group of B-class sectors outlined below:

- **B1 Business** (offices, research & development, light industry);
- **B2 General Industrial**; and

- **B8 Storage or Distribution** (wholesale warehouses, distribution centres).

1.12 Demand for B-class employment land and floorspace represents the particular focus of this report. This reflects the approach of the NPPF which states that significant weight should be placed on supporting growth and planning proactively to meet the development needs of businesses, and the need for local planning authorities to plan proactively to meet the development needs of business. In this context, business uses are recognised as a key barometer of economic need, and represents the most appropriate basis on which to plan positively for economic growth. References to ‘employment space’ are intended to mean both these elements. Industrial space in this report includes both manufacturing and distribution uses.

1.13 The study also considers future projections for growth in non B-class sectors to set out how the overall economy in Crawley could change in the future, although does not specifically assess the space implications of these other sectors because they are planned for using different methodologies. Given the varied range of employment typologies outside of the B-classes, and different land requirements associated with these, it is not possible to translate non B-class job growth into accurate land requirements as part of this study.

1.14 An important consideration for any work of this type is that it is inevitably a point-in-time assessment. This study has incorporated the latest data and other evidence available at the time of preparation, which may be subject to future change or revision. The accuracy and sources of data derived from third party sources has not been checked or verified by NLP. In line with market conventions, values (i.e. rents) for commercial space are expressed in £ per ft^2 although metric units of measurements (i.e. m^2) have generally been used elsewhere in the report.

1.15 It should be noted that the scope of this EGA update for Crawley Borough is limited to preparing new scenarios of economic growth, estimating the land requirements associated with these scenarios and comparing these requirements with the latest employment land supply position, as set out in CBC’s Employment Land Trajectory (dated February 2015).

1.16 In line with the original 2014 EGA, the terms of reference for this study do not require specific consideration of the potential employment or economic impacts arising from any additional runway capacity at Gatwick Airport but assumes that the Airport develops to its maximum capacity of 45 million passengers per annum within its existing runway capacity. The report does however consider the implications for economic growth within the context of land that is currently safeguarded to accommodate a potential second runway at Gatwick Airport. Until such time as there is a formal Government decision on the future of UK airport capacity, the land will continue to be safeguarded from development in the Crawley Local Plan. This significantly limits the potential availability of developable land within Crawley, and represents a key constraint that is considered through the original EGA and update work.

Structure of Report

1.17 Section 2.0 of the report presents the updated scenarios of future economic growth for Crawley, the employment space requirements arising from these and a comparison of these growth trajectories with past employment growth and development trends within the Borough.

1.18 Section 3.0 considers the balance between demand for, and supply of, employment land in Crawley over the Local Plan period in quantitative terms, by comparing forecast requirements with the latest employment land supply position (as set out in the Council's Employment Land Trajectory).

1.19 Details of assumptions and other supporting information are set out in the appendices.

2.0 Future Economic Growth Needs

2.1 This section considers future economic growth needs in Crawley by drawing on a number of potential future economic scenarios for the Borough. These scenarios are used to inform an analysis of the potential economic growth drivers within Crawley and the employment land and planning policy implications that flow from these.

Approach

2.2 The NPPF requires local authorities to*, "set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth"* (para 21). In evidence base terms, this should be underpinned by, *"a clear understanding of business needs within the economic markets operating in and across their area"* (para 160).

2.3 In this context, a number of potential future economic scenarios have been developed through this EGA update study to provide a framework for considering future economic growth needs in Crawley. These scenarios draw on December 2014 Experian quarterly economic modelling (the latest available at the time of preparation) based on national and regional projections profiled to take account of past trend growth and representation of economic sectors at a local level. The scenarios are as follows:

1. **Baseline scenario**: based on the December 2014 model run of the Experian UK Regional Planning Service (RPS) which provides local area forecasts covering 38 industrial sectors and providing detailed employment and GVA estimates to 2030. This reflects a range of standard assumptions about the way in which the national and regional economy is expected to perform, incorporating short and long term drivers.
2. **Alternative scenarios**: A number of alternative scenarios have been considered which take account of planned investment or intelligence about future sector/site potential as the basis for modelling an uplift factor applied to the growth rates for individual sectors by 2030. These factors have been identified by CBC and provide an indication of additional growth potential over and above the baseline scenario. The resulting employment and spatial requirements associated with alternative scenarios are presented in cumulative terms alongside the baseline.

2.4 The outputs of each scenario are expressed in terms of total employment (including self-employment). Each alternative scenario is considered separately in terms of presenting a level of growth that could be generated over and above the baseline.

2.5 It should be emphasised that economic forecasts tend to be most reliable at national and regional scales and consequently less so at the local economy level, but they are widely recognised as a valuable input and can indicate the broad scale and direction of economic growth in different sectors to help assess future employment space requirements.

2.6 The forecasts of job growth by sector used here reflect recent trends and are based on projections at regional level, and how economic sectors in Crawley have fared relative to the region's growth in the past. These forecasts also reflect the current post-recession economic climate, and ongoing uncertainty surrounding future economic prospects.

2.7 Population projections form one of a number of inputs to the production of economic forecasts, both in terms of future changes in working-age population (which directly impacts on demand for jobs) and total population (which generates demand for consumption activities e.g. local goods and services). Experian have made use of the 2012-based ONS Sub National Population Projections (which provide projections to 2037) as an input to the December 2014 release. It is important to note that population projections are frequently revised, as are assumptions around future working age population, economic activity rates and national changes to the pension age. In addition the forecasts take no account of future planned housing growth in any particular location. The forecasts also assume that existing patterns of commuting (based on the ONS Annual Population Survey) remain unchanged.

2.8 More broadly, it is important to emphasise that forecasting approaches of this type have some limitations, particularly at a time of change in the wider economy. However, to be robust, the economic growth potential and likely demand for employment space in the Borough needs to be tested under different scenarios to reflect a range of potential economic conditions that could arise in the future. Thus while the baseline scenario effectively provides an indication of the 'base case' position drawing on macro-economic forecasts, the alternative scenarios provide an illustration of the growth potential of the economy under different circumstances rather than a prescriptive requirement.

2.9 The alternative scenarios (i.e. numbers two and three) to varying degrees incorporate a supply based approach that assesses the potential uplift to economic growth that could be achieved if a certain number and type of sites were brought forward over the Local Plan period. This approach differs from the baseline scenario (number one) which is purely driven by employment demand arising from job growth.

2.10 It should also be noted that the assessment is not purely quantitative, and that there may also be qualitative factors that influence the future scale of economic growth and/or the future employment space requirements that need to be planned for. These wider qualitative factors are considered in detail in the original (2014) EGA.

1. Baseline scenario

2.11 Forecasts of job growth for Crawley for the period up to 2030 were obtained from Experian from the December 2014 quarterly release. Table 2.1 presents the fastest growing sectors alongside those sectors expected to see a decline in employment.

Table 2.1 Fastest growing and declining sectors in Crawley 2015-2030

Sector	% Change 2015-2030	Additional Jobs 2015-2030
Admin and support services	42.9	8,230
Finance	48.9	1,860
Air and water transport	17.5	1,620
Wholesale	29.6	1,570
Accommodation and food services	17.3	1,090
Computing and Information Services	-7.5	-150
Public admin and defence	-10.5	-260
Manufacturing	-23.8	-1,180

Source: Experian / NLP analysis, 2014 - total jobs including self-employed

B Class; Part B Class; Non B Class

2.12 The overall employment change in Crawley resulting from these forecasts is shown in Table 2.2 along with expected job growth in the main B class sectors. This includes an allowance for jobs in other non B class sectors that typically utilise industrial or office space, such as some construction uses, vehicle repair, courier services, road transport and cargo handling and some public administration activities (see Appendix 1). In order to reflect the presence of Gatwick Airport within the Borough, this allowance has been specifically adjusted to reflect how some airport-related activities make use of B class space. A full breakdown of baseline workforce jobs by sector in Crawley is provided in Appendix 2.

Table 2.2 Forecast Employment Change in Crawley 2015-2030

	No. of Jobs		Change
	2015	2030	2015-2030
Manufacturing (B1c/B2)*	7,030	6,200	-830
Distribution (B8)**	8,520	9,725	1,205
Offices (B1a/b)***	17,565	20,910	3,345
Total B-class Jobs	**33,115**	**36,835**	**3,720**
Jobs in All Sectors	**99,300**	**114,460**	**15,160**

Source: Experian / NLP analysis, 2014 - total jobs including self-employed

Totals rounded

* includes vehicle repair and some construction activities ** includes parts of transport & communications sectors that use industrial land *** includes publishing and a proportion of government offices

2.13 These figures indicate moderate overall net job gains (3,720 jobs) in the B-use classes in Crawley over the period to 2030, with strong growth in office-based activities and moderate gains in distribution jobs offset by a moderate decline in manufacturing employment. This is within the context of overall job growth of 15,160 jobs forecast for the Borough over the period (1,011 jobs per year), which outside the B Class sectors will mainly be in the air and water transport, hospitality and support services sectors (Table 2.1). Total GVA growth associated with the Experian baseline employment forecast is equivalent to approximately 3.1% per year (between 2015 and 2030).

2.14 This forecasts a net increase of 3,720 B Class jobs over a 15-year period (to 2030) which is equivalent to an average of 248 additional jobs each year. This is slightly higher than the job growth achieved in Crawley over the period 1997-2015 when Experian data indicates that B class jobs in the Borough increased by approximately 222 jobs per annum. In B class terms, the above employment forecasts are not inconsistent with past trends of B class job growth within Crawley, but imply a slightly higher level of growth within B class sectors of the Borough's economy.

2.15 It should be noted that the December 2014 Experian projections and dataset use employment data obtained from the 2013 Business Register and Employment Survey (BRES), which provides information on historic employment trends up until 2012. As a result, Experian employment data relating to the year 2013 onwards effectively represents a forecast figure and may be subject to future revision. This includes employment figures for 2015 presented in this EGA Update.

2. Alternative higher growth scenario

2.16 An alternative higher growth scenario has been developed which specifically factors in key policy priorities for the Borough. Discussions were held with Council officers to identify a number of sectors (outlined in Table 2.3) which are considered to have the potential to outperform the level of employment growth implied by the baseline scenario. In particular, this higher growth scenario explores the potential for enhanced higher-value economic growth within a number of key growth sectors identified by the Gatwick Diamond[1] and Coast to Capital LEP[2].

[1] Gatwick Diamond Local Strategic Statement, July 2011
[2] Coast to Capital Local Enterprise Partnership, Strategic Economic Plan March 2014

Table 2.3 Identified Sectors

Growth Sector	Rationale for change/enhanced growth
Advanced Engineering	• Comprising the Experian sectors of chemicals, machinery and equipment, computer and electronic products, transport equipment manufacturing • Employment growth in these sectors over the period 2015-2030 implied by the baseline is negative - these job losses have been cancelled out to equal zero growth
Creative Digital and IT	• Comprising the Experian sectors of computing & information services and media activities • Employment growth in these sectors over the period 2015-2030 implied by the baseline is negative - these job losses have been cancelled out and the scale of growth increased to match the South East average of 14.8% and 22.3% respectively
Financial and Business Services	• Comprising the Experian sectors of finance, insurance & pensions, real estate and professional services • Employment growth in these sectors over the period 2015-2030 implied by the baseline is positive, therefore the growth rate has been increased by 10% for all sectors
Healthcare, Medical Technology and Life Sciences	• Comprising the Experian health sector • Employment growth in this sector over the period 2015-2030 implied by the baseline is positive, therefore the growth rate has been increased by 10%

2.17 As shown in Table 2.4, these sector specific adjustments equate to an additional 2,435 jobs (162 jobs per year) above the baseline scenario by 2030 (total of 116,895 by 2030), representing an increase of 16% over and above the level of employment growth implied by the baseline scenario. 2,205 (91%) of these additional jobs relate to B class sectors, equivalent to an additional 147 B class jobs per year over and above the baseline.

Table 2.4 Forecast Employment Change in Crawley 2015-2030 (Higher Growth Alternative Scenario)

	No. of Jobs		Change
	2015	2030	2015-2030
Manufacturing (B1c/B2)*	7,030	6,550	-480
Distribution (B8)**	8,520	9,725	1,205
Offices (B1a/b)***	17,565	22,765	5,200
Total B-class Jobs	**33,115**	**39,040**	**5,925**
Jobs in All Sectors	**99,300**	**116,895**	**17,595**

Source: Experian / NLP analysis, 2014 - total jobs including self-employed

Totals rounded

* includes vehicle repair and some construction activities ** includes parts of transport & communications sectors that use industrial land *** includes publishing and a proportion of government offices

2.18 It is worth noting that under this alternative higher growth scenario, the manufacturing sector in Crawley is still forecast to decline in employment terms by 2030, although the scale of decline is expected to approximately half. This reflects the fact that a number of the Gatwick Diamond and LEP growth sectors (which are subject to zero growth under this scenario as opposed to decline under the baseline scenario) are higher value manufacturing sectors (such as chemicals, machinery, electronic and transport equipment manufacturing).

2.19 As noted in section 1.0, the assumptions and key policy priorities that feed into the ‘higher growth’ scenario in this update study differ slightly from those adopted as part of the original 2014 EGA study. In particular, employment growth within the retail, recreation and leisure sectors was adjusted upwards by the 2014 EGA to reflect proposals at the time for the retail-led regeneration of Crawley Town Centre. This uplift has not been re-applied for the purposes of this update due to the non-progression of this scheme in the intervening period which means that this scheme is not now expected to be delivered over the Plan period.

3. Alternative potential site capacity scenario

2.20 A second alternative scenario has also been considered which explores the employment and spatial implications associated with a number of potential employment sites coming forward for development over the Plan period. This scenario provides a purely theoretical assessment of the economic implications that could arise if two strategic employment sites (location not defined) were to be brought forward in Crawley. This does not take account of potential market demand, delivery or planning policy factors.

2.21 For modelling purposes, it has assumed that each strategic employment site is of a significant scale (circa 30-40 hectares) and accommodates up to 3,000 jobs across over broadly 100,000m^2 of commercial floorspace. In light of Crawley’s existing business base and patterns of market demand, it has been assumed that the focus of any such development would be high quality business park premises, alongside some ancillary hospitality, recreational and educational activities.

2.22 In employment terms, this potential site capacity scenario would provide the basis for an additional 6,000 jobs over and above the baseline position by 2030 (Table 2.5), accelerating the level of job growth implied by the baseline scenario by a further 40% or 400 jobs per year. The majority (4,570 or 76%) of these additional jobs fall within B class sectors, specifically those occupying office (B1a/b) space, whilst no change is assumed to the levels of manufacturing and distribution employment growth indicated by the baseline scenario.

Table 2.5 Forecast Employment Change in Crawley 2015-2030 (Potential Site Capacity Alternative Scenario)

	No. of Jobs		Change
	2015	2030	2015-2030
Manufacturing (B1c/B2)*	7,030	6,200	-830
Distribution (B8)**	8,520	9,725	1,205
Offices (B1a/b)***	17,565	25,485	7,920
Total B-class Jobs	**33,115**	**41,405**	**8,290**
Jobs in All Sectors	**99,300**	**120,460**	**21,160**

Source: Experian / NLP analysis, 2014 - total jobs including self-employed

Totals rounded

* includes vehicle repair and some construction activities ** includes parts of transport & communications sectors that use industrial land *** includes publishing and a proportion of government offices

Future Employment Space Requirements

2.23 The B-class element of these job forecasts have been converted to future employment space requirements by applying the latest published density figures for employment space which take account of recent trends in occupancy for the different B class uses. To estimate space requirements, the following average ratios have been applied to job forecasts:

- **Offices:** 1 job per 10.5m^2 for general office space;
- **Industrial:** 1 job per 43m^2 as an average across B1c and B2 uses; and
- **Warehousing:** 1 job per 65m^2 for general, smaller scale warehousing (assumed to account for 70% of total stock) and 1 job per 74m^2 for large scale, lower density units (assumed to account for 30% of total stock).

2.24 These assumptions are based on latest HCA/OffPAT guidance on employment densities published in 2010.[3] The guidance takes into account recent trends in term of the change uses of employment space, with the main change being the more efficient use of office space through flexible working and hot-desking. For consistency, these assumptions are the same as applied in the 2014 EGA.

2.25 An allowance of 10% is added to all floorspace requirements to reflect normal levels of market vacancy in employment space. Where a reduction in jobs is forecast (e.g. manufacturing), the associated negative floorspace was halved. This reflects that while there may be ongoing manufacturing job losses (e.g. as firms use more efficient production approaches), it doesn't automatically follow that all of the existing employment is lost.

[3] Based on HCA/OffPAT Employment Densities Guide (2010) and converted to Gross External Area (GEA) and total workforce jobs by NLP

Table 2.6 Net Floorspace Requirement by Scenario to 2030 (m^2)

Use	1. Baseline	2. Higher Growth	3. Potential Site Capacity
Offices (B1a/B1b)	38,630	60,055	91,430
Manufacturing (B1c/B2)	-17,900	-10,375	-17,900
Distribution (B8)	89,650	89,650	89,650
All B uses	**110,380**	**139,330**	**163,180**

Source: NLP analysis

2.26 Under the baseline scenario, the net B-class requirement is equivalent to 110,380m^2 by 2030, the majority of which relates to distribution (B8) space. This requirement increases to 139,330m^2 under the alternative higher growth scenario, again with distribution uses accounting for the majority of this floorspace but with a greater office requirement too. The alternative potential site capacity scenario produces the highest net floorspace requirement at 163,180m^2 to 2030, with office and distribution uses accounting for this requirement roughly evenly.

Safety Margin

2.27 To estimate the overall requirement of employment space that should be planned for in allocating sites, and to give some flexibility of provision, it is normal to add an allowance as a safety margin for factors such as delays in some sites coming forward for development.

2.28 In a location like Crawley with a relatively constrained land supply and significant development pressure from other uses, there is a need to ensure a reasonable but not over-generous additional allowance that provides for some flexibility but avoids over-provision of scarce land. However, it also needs to reflect the fact that there may be potential delays in some of the Borough's development sites coming forward for development.

2.29 The former South East England Partnership Board (SEEPB) guidance on employment land assessments[4] recommends an allowance that is equivalent to the average time for a site to gain planning permission and be developed, typically about two years. For Crawley, the margins set out in Table 2.7 were added for B Class use based on two years of average net take-up. This appears an appropriate level relative to the scale of the original requirement.

Table 2.7 Safety Margin Allowances

Use	Average Annual Net Take-up (m^2)	Safety Margin Added (m^2)
Offices (B1a/b)	14,270	28,540
Industrial (B1c/B2/B8)	7,420	14,840

Source: NLP analysis

[4] South East England Partnership Board, South East Plan Supplementary Guidance: Employment and Economic Land Assessments, March 2010

Loss Replacement

2.30 To convert the net requirement of employment space into a gross requirement (the amount of employment space or land to be allocated), an allowance is also typically made for some replacement of losses of existing employment space that may be developed for other, non B Class uses.

2.31 Judgements were made on the suitability and degree of the allowance for future losses which it would be appropriate to apply here based on analysis of supply-side deliverability factors and current trends in the market. Not all losses need to be replaced as some will reflect restructuring in the local economy as less manufacturing space is needed in future. In the past, loss of employment space in Crawley has largely been driven by falling demand for industrial (particularly B2) uses, while manufacturing employment is forecast to decline in the Borough over the next 15 years. Wider land availability constraints provide a continued challenge for the sub-region with regards to loss replacement.

2.32 Therefore, it is considered inappropriate for the Borough to replace all losses of employment space going forward and it has been assumed that 50% of the average annual loss of industrial and office space over the last 13 years (2002-2014) will be replaced each year, equating to the floorspace figures outlined in Table 2.8 below. This assumption is made on the basis that losses of industrial space in the past to an extent reflect the wider restructuring of the economy away from manufacturing to service based activities, while historically loss of office space has largely involved loss of older, redundant office space.

2.33 It should be noted that the recent introduction of Permitted Development rights for change of use from offices to residential has started to have an impact upon the stock of office space in Crawley, with CBC monitoring data indicating that over 18,000m^2 of office space has received approval for change of use since July 2013. The Council will need to closely monitor the impact of this national policy (assuming it continues) upon the Borough's office supply over the Plan period in order to ensure that future losses of office space are adequately mitigated against.

Table 2.8 Loss Replacement Allowances (over the period 2015-2030)

Use	Total Loss Replacement (m^2)
Offices (B1a/b)	72,050
Industrial (B1c/B2/B8)	61,380

Source: NLP analysis

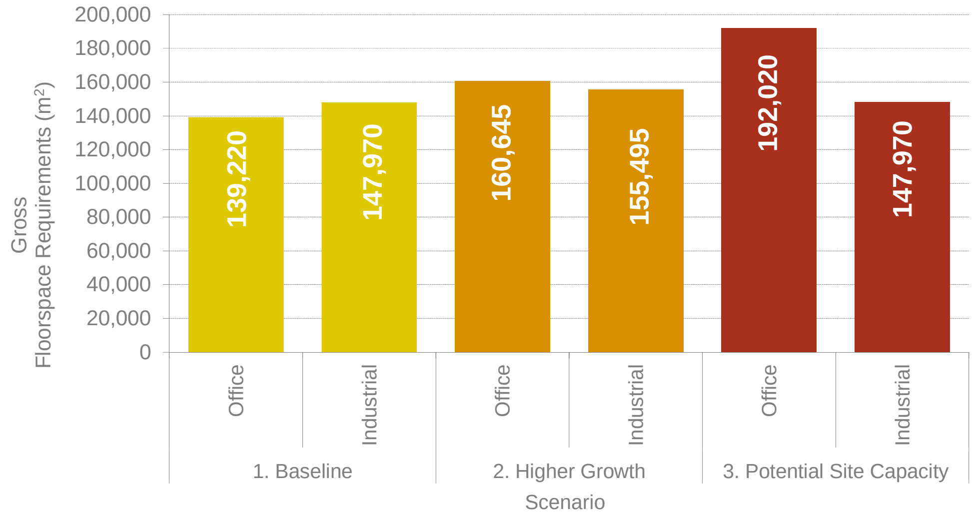
2.34 The resultant gross floorspace requirements incorporating these allowances are set out in Table 2.9 and Figure 2.1.

Table 2.9 Gross Floorspace Requirement by Scenario to 2030 (m^2)

Use	1. Baseline	2. Higher Growth	3. Potential Site Capacity
Offices (B1a/B1b)	139,220	160,645	192,020
Industrial (B1c/B2/B8)	147,970	155,495	147,970
All B uses	**287,190**	**316,140**	**339,990**

Source: NLP analysis

Figure 2.1 Gross Floorspace Requirements by Scenario (m^2)



Source: NLP analysis

2.35 The range of floorspace requirements for industrial development land is not particularly wide, between 147,970m^2 and 155,495m^2 to 2030 depending on the approach used. Compared with the stock of industrial space in Crawley in 2012[5] (i.e. the most recent year for which consistent VOA data is available), this range would be equivalent to an increase in the Borough's stock of between 23% and 24% to 2030.

2.36 For office floorspace, the range is slightly wider, between 139,220m^2 and 192,020m^2 to 2030. Compared with the stock of office space in Crawley in 2012[6], this range would be equivalent to an increase in stock of between 36% and 49% to 2030.

Land Requirement

2.37 The final step, for all scenarios, is to translate floorspace into land requirements for both office and industrial uses. This has been calculated by applying appropriate plot ratio assumptions to the floorspace estimates using the following assumptions and local adjustment factors to reflect the pattern of development in the Borough:

5 Based on industrial stock of 638,000m^2 as recorded by the VOA for 2012
6 Based on office stock of 389,000m^2 as recorded by the VOA for 2012

- **Industrial** – a plot ratio of 0.4 was applied so that a 1 ha site would be needed to accommodate a footprint of 4,000sq.m of employment floorspace; and
- **Offices** – it was assumed that 50% of new floorspace would be in lower density developments with a plot ratio of 0.4, with 50% in higher density urban/town centre locations at a plot ratio of 2.0.

2.38 Under the alternative 'potential site capacity' scenario, the plot ratio assumption for offices has been adjusted to reflect the profile and nature of strategic sites being considered, whereby 100% of new floorspace would be in lower density developments with a plot ratio of 0.4.

2.39 The resulting land requirements are set out in Table 2.10 and Figure 2.2.

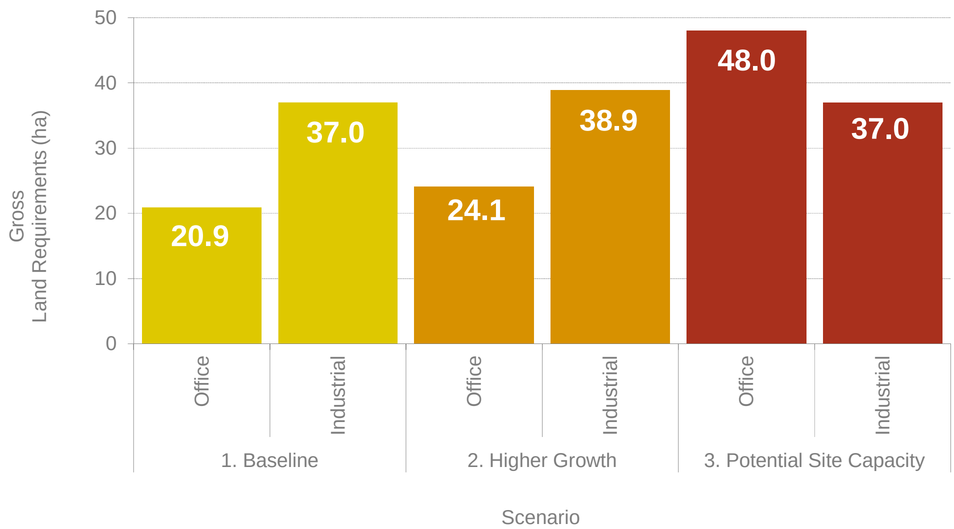
Table 2.10 Gross Land Requirement by Scenario to 2030 (ha)

Use	1. Baseline	2. Higher Growth	3. Potential Site Capacity
Offices (B1a/B1b)	20.9	24.1	48.0
Industrial (B1c/B2/B8)	37.0	38.9	37.0
All B uses	**57.9**	**63.0**	**85.0**

Source: NLP analysis

Note: The requirement for 85ha under the potential site capacity alternative scenario has been modelled based on the estimated net deliverable area of the potential strategic sites rather than the full or gross site area (assumed to be up to 40ha per site). It does not take account of other non-B commercial uses on site (such as hospitality and recreational activities)

Figure 2.2 Gross Land Requirement by Scenario (ha)



Source: NLP analysis

Sensitivity Tests

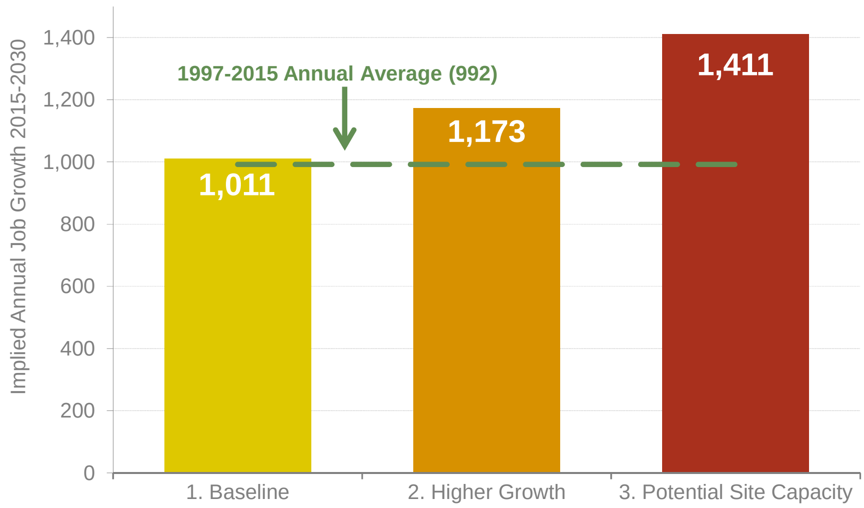
2.40 Given the range of potential requirements implied by these different estimates of future requirements, it is important to test how reasonable each appears against other factors and how sensitive they are to different assumptions.

Comparison with Past Growth Trends

2.41 It is useful to compare the employment growth implied by these amounts of land with employment growth actually achieved in Crawley in recent years (Figure 2.3). The 2014 Experian baseline forecasts indicate overall employment growth of 15,160 jobs in Crawley between 2015 and 2030, equivalent to 1,011 jobs per annum. This figure is slightly higher than annual growth of 992 jobs recorded in Crawley over the last 18 years (1997-2015), and therefore implies a slightly higher level of future economic growth than the Borough has achieved in the recent past. However, the past trends do include a period of recession in which the Borough's economy contracted by around 4,000 jobs.

2.42 The two alternative scenarios of future growth both imply a greater scale of average annual employment growth over the 15 year period to 2030 than the baseline. They both exceed past levels of growth recorded in the Borough by 18% and 42% respectively.

Figure 2.3 Annual Job Growth Implied by Scenarios



Source: Experian 2014 / NLP analysis

2.43 On this basis, compared with relatively recent economic performance, planning to meet the employment and spatial implications associated with the minimum baseline scenario would effectively represent a continuation of past employment growth trends. The alternative, higher growth scenarios generate a higher level of job creation than has been achieved in the Borough in the recent past, although as previously noted these alternative scenarios should be regarded as an illustration of the growth potential of the local economy under different circumstances rather than a prescriptive forecast of future employment growth.

2.44 It should be noted that historic patterns of employment implied by Experian data are revised and updated on a regular basis as new ONS data is released and incorporated into the econometric model.

Benchmarking with Past Development Rates

2.45 In order to sensitivity test the spatial requirements emerging from the baseline and alternative (higher) employment growth scenarios, it is useful to estimate future employment land needs in Crawley using past development trends as a proxy (because they reflect market demand and actual development patterns on the ground), whereby assuming that future B class development rates carry on at the long term average achieved in the past across the authority area.

2.46 Data on past completions by B class sector was provided by West Sussex County Council and analysed for the period 2002-2014, since this is a reasonably long period that reflects a full business cycle with periods of both economic growth and recession. Average annual net completions amounted to 14,270m^2 for office (B1a/b) uses and 7,420m^2 for industrial (B1c/B2/B8) uses over this period.

2.47 One view of future growth in Crawley could simply assume that future development rates carry on at the long term average achieved in the past. If it were assumed that the past net completion rates noted above continued in the 15 years between 2015-2030, and after converting the net requirement for employment space into a gross requirement (using the same methodology outlined above), this would equate to a need for 502,160m^2 or 94.1ha of employment space in Crawley by 2030 (Table 2.11).

Table 2.11 Employment Space Requirement based on Past Trends Continuing, 2015-2030

Use	Net Annual Completion (2002-14) (m^2)	Gross Floorspace Required (m^2)	Land Required (ha)
Offices (B1a/B1b)	14,270	314,640	47.2
Industrial (B1c/B2/B8)	7,420	187,520	46.9
All B uses	**21,690**	**502,160**	**94.1**

Source: West Sussex County Council / NLP analysis

2.48 Just under two thirds (63%) of this requirement relates to office (B1a/b) space. This gross land requirement is equivalent to nearly double the requirement estimated using baseline job forecasts, reflecting the scale of commercial office and industrial stock within Crawley and the ongoing churn within the local commercial property market and key sites such as Manor Royal.

2.49 It is worth noting that the positive requirements for employment space set out in this section incorporate an allowance for replacement of on-going losses of employment space to other uses[7], whilst recognising the difficulty of continuing to replace losses due to the physical constraints and lack of readily available land for development in the Borough. Theoretically, a reduction in the requirement for space could be achieved by removing or reducing the allowance for replacing for windfall losses of employment space. However, such an approach would run counter to the well-established principle in employment land assessments. Moreover, such an accounting exercise would risk a diminution in the amount of employment space available, potentially harming the Borough's economic vitality.

Comparison with 2014 Northern West Sussex EGA

2.50 The Submission Crawley Local Plan incorporates the key findings from the 2014 Northern West Sussex EGA as a key evidence base to inform the overall quantum of employment land to be planned for over the period 2015 to 2030. It is therefore useful to compare those requirements with the 2015 EGA Update study to identify any deviation in overall employment space requirements.

2.51 Table 2.12 below presents a comparison of the baseline and higher growth scenarios of employment growth set out in both studies. The different forecasts relate to different time periods, therefore figures are also presented on an annualised basis to enable comparison.

Table 2.12 Key outputs by scenario

Scenario		2014 EGA (2011-2031)	EGA Update 2015 (2015-2030)
Baseline	Total workforce jobs growth	16,440 (822 p.a.)	15,160 (1,011 p.a.)
	B class jobs growth	5,880 (294 p.a.)	3,720 (248 p.a.)
	Gross floorspace requirement (m^2)	387,540 (19,377 p.a.)	287,190 (19,146 p.a.)
	Gross land requirement (ha)	77.2 (3.9 p.a.)	57.9 (3.9 p.a.)
Higher Growth	Total workforce jobs growth	20,130 (1,007 p.a.)	17,595 (1,173 p.a.)
	B class jobs growth	8,310 (416 p.a.)	5,925 (395 p.a.)
	Gross floorspace requirement (m^2)	435,300 (21,765 p.a.)	316,140 (21,076 p.a.)
	Gross land requirement (ha)	87.6 (4.4 p.a.)	63.0 (4.2 p.a.)
Potential Site Capacity	Total workforce jobs growth	22,440 (1,122 p.a.)	21,160 (1,411 p.a.)
	B class jobs growth	10,450 (523 p.a.)	8,290 (553 p.a.)
	Gross floorspace requirement(m^2)	440,330 (22,017 p.a.)	339,990 (22,666 p.a.)
	Gross land requirement (ha)	110.1 (5.5 p.a.)	85.0 (5.7 p.a.)

[7] This reflects the approach advocated in the ODPM guidance and the SEEPB Guidance (2010)

2.52 This indicates that overall job growth associated with the baseline scenario in the 2015 EGA Update study significantly exceeds job growth identified within the 2014 study across all three scenarios. Specifically, the latest Experian employment forecasts (taken from the December 2014 release) imply a significantly higher level of annual job growth within Crawley over the plan period (1,011 jobs per year) compared with the equivalent May 2013 projections obtained as part of the 2014 EGA (822 jobs per year).

2.53 By contrast however, the implied proportion of total job growth relating to B use classes (i.e. office and industrial) is lower under the latest Experian projections (at 248 B class jobs per annum) than compared with the 2014 EGA. The latest projections suggest that B class jobs will represent 25% of all job growth in Crawley between 2015 and 2030, while the equivalent per annum figure implied by the Experian projections set out in the 2014 EGA was 36% (Table 2.12).

2.54 The combined effect of these two trends means that the overall scale of growth in terms of B-class jobs within Crawley over the Plan period to 2030 is broadly comparable across the two EGA studies and sets of econometric forecasts.

2.55 This disparity between the two sets of economic forecasts underlines the sensitivity of local forecasts to national macroeconomic conditions and reflects the changing economic climate and more favourable macroeconomic outlook that has prevailed over the intervening period between May 2013 and December 2014.

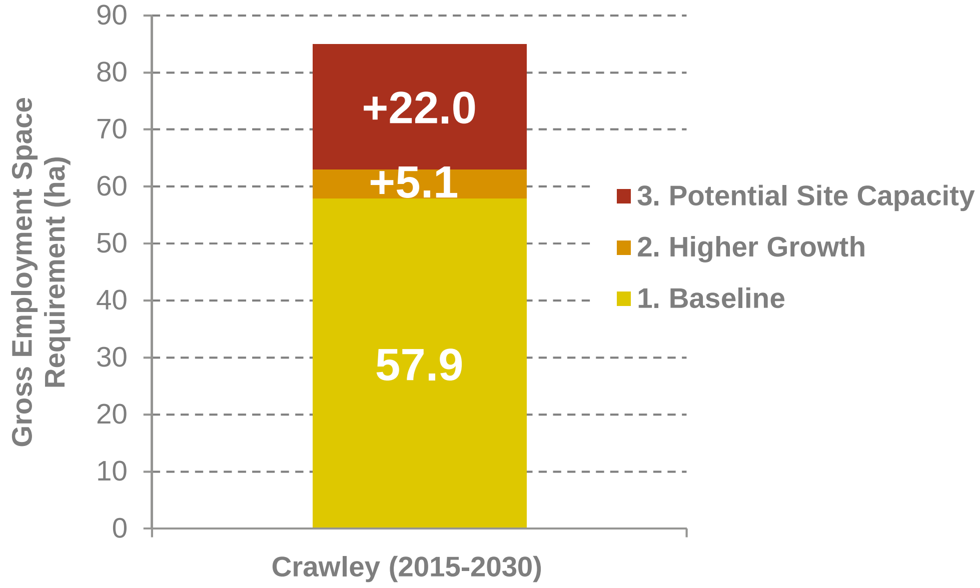
Conclusions

2.56 A number of potential future economic scenarios have been developed, based on a number of approaches which reflect baseline and alternative, higher trajectories of economic growth within Crawley. All of these scenarios reflect assumptions of higher future economic growth (in employment terms) in Crawley than the Borough has achieved in the recent past (notwithstanding that the scale of difference between the baseline scenario and past trends is minimal) but lower levels of growth when benchmarked with past rates of B class development that has occurred within Crawley in recent years.

2.57 Under the 2015 EGA Update baseline scenario, the overall space requirement equates to 287,190m^2 or 57.9ha for all types of employment space up to 2030. This ‘base case’ position effectively represents the minimum objectively assessed need for employment land that the Council should seek to plan for to support economic growth within the local area.

2.58 A number of alternative ‘higher growth’ and ‘potential site capacity’ scenarios have also been considered which take account of planned investment or intelligence about future sector/site potential and provide an indication of additional growth capacity over and above the baseline scenario. The additional spatial requirement arising from the ‘higher growth’ alternative scenario is relatively modest (equivalent to an increase 9% over and above the baseline) but significantly higher under the 'potential site capacity' scenario at 47% over and above the baseline (Figure 2.4).

Figure 2.4 Gross Land Requirement by Scenario (ha)



Source: NLP analysis

2.59 These alternative scenarios should be regarded as illustrations of growth potential of the economy under different circumstances rather than forecasts of demand or a prescriptive requirement for economic planning purposes.

3.0 Demand/Supply Balance of Employment Land

3.1 This section draws together the forecasts of future economic growth and land requirements and estimates of employment land that is likely to be available for development over the Plan period to identify any need for more provision of employment space, or surpluses of it, in both quantitative and qualitative terms.

3.2 The previous section identified a need for between 287,190m^2 and 339,990m^2 of employment space up to 2030, including a modest safety margin largely to allow for delays in sites coming forward for development. The land requirements associated with these amounts of employment floorspace were estimated at between 57.9ha and 85.0ha depending upon the scenario.

Employment Land Trajectory

3.3 The supply of employment space in the Borough's development pipeline comes from employment allocations and plots that have not yet been built out or have recently been cleared, and from other sites with outstanding planning permission for B class development.

3.4 Drawing upon employment land supply information presented in the 2014 Northern West Sussex EGA (based upon WSCC monitoring data at March 2012), CBC has prepared an Employment Land Trajectory ('ELT') in order to identify a future supply of land which is suitable, available and achievable for economic development over the Plan period (2015-2030). This takes account of the latest planning permissions, pre-application discussions, and active engagement with land agents and site owners, to provide an up-to-date picture of the available pipeline of business land in the Borough.

3.5 Together, these sites have the potential to provide just under 165ha of employment land across a range of B class uses over the Plan period 2015 to 2030 (Table 3.1). Just over half (54%) of this supply relates to office (B1a/b) uses with the remaining 46% representing industrial (B1c/B2/B8) space. The majority (84%) of land is subject to Gatwick Airport safeguarding.

Table 3.1 Available Employment Space in Crawley (2015 to 2030)

	New Employment Floorspace (ha)		
	Offices (B1a/b)	Industrial (B1c/B2/B8)	Total
Non Safeguarded Sites	18.0	7.8	25.8
Safeguarded Sites	71.0	68.2	139.2
Total	**89.0**	**75.9**	**164.9**

Source: Crawley Borough Council Employment Land Trajectory (February 2015) / NLP analysis

Note: Where a site does not benefit from a specific planning permission, the split between office and industrial uses has been estimated on a 50:50 basis by NLP

3.6 A broad comparison of estimated demand for B Class space arising from the baseline scenario (as set out in the previous Section) against all currently identified supply, as shown in Table 3.2 implies that Crawley would have enough employment space in quantitative terms up to 2030 to meet the needs arising from the 'base case' scenario of future requirements, for both office and industrial uses, if sites subject to safeguarding are included within this supply position.

3.7 However if sites subject to safeguarding are removed from the ELT and pipeline supply over the Plan period to 2030, the demand/supply balance of employment land would become much tighter, with a potential shortfall of land available for both office and industrial uses, equivalent to 2.9ha and 29.2ha of employment space respectively (Table 3.2).

Table 3.2 Demand/Supply balance for office and industrial space to 2030 (ha) – Baseline Scenario

	Total Supply Including Safeguarded Sites	Total Supply Excluding Safeguarded Sites
Office		
Office space requirement (ha)	20.9	
Potential supply of office space (ha)	89.0	18.0
Surplus(+)/Shortfall(-) (ha)	**+68.1**	**-2.9**
Industrial		
Industrial space requirement (ha)	37.0	
Potential supply of industrial space (ha)	75.9	7.8
Surplus(+)/Shortfall(-) (ha)	**+38.9**	**-29.2**

Source: Crawley Borough Council Employment Land Trajectory (February 2015) / NLP analysis

Supply Trajectory

3.8 The ELT compiled by CBC details the expected timeframe as to when individual employment sites are anticipated to come forward over the Plan period, and assigns each site into broad 'office' and 'industrial' land use categories. Each site has been allocated to a five-year period within the Local Plan (i.e. Years 0-5, Years 6-10 and Years 11-15) based on a combination of factors including their planning and safeguarded status. The full methodology adopted by CBC for developing the ELT is provided in the accompanying 'Crawley Local Plan Employment (Business) Land Trajectory 2015-2030 Guidance Note'.

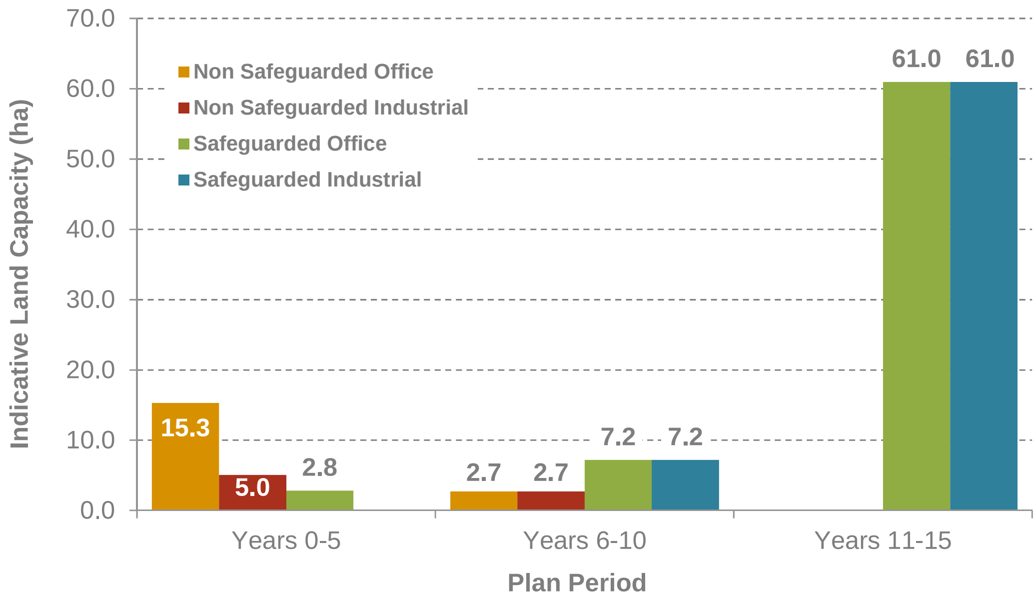
3.9 The output from this exercise is presented in the Crawley ELT and summarised in Table 3.3 and Figure 3.1 overleaf.

Table 3.3 Indicative Delivery Trajectory for Employment Land Supply by Five-Year Period

		Land Supply (ha)			
		Years 0-5	Years 6-10	Years 11-15	Total (Years 0-15)
Total Supply Including Safeguarded Sites	Offices (B1a/b)	18.1	9.9	61.0	**89.0**
	Industrial (B1c/B2/B8)	5.1	9.9	61.0	**76.0**
	Total (rounded)	23.2*	19.8	122.0	**165.0**
Total Supply Excluding Safeguarded Sites	Offices (B1a/b)	15.3	2.7	0	**18.0**
	Industrial (B1c/B2/B8)	5.1	2.7	0	**7.8**
	Total (rounded)	20.4	5.4	0	**25.8**

Source: Crawley Borough Council Employment Land Trajectory (February 2015) / NLP analysis
* This 23.2ha total figure includes a 2.8ha site (Southways) that falls within safeguarded land but has an extant planning permission for B Class (office) development

Figure 3.1 Indicative Delivery Trajectory for Employment Land Supply by Five-Year Period



Source: Crawley Borough Council Employment Land Trajectory (February 2015) / NLP analysis

3.10 As noted above, the majority (84%) of employment land identified by the ELT is subject to Gatwick Airport safeguarding. This is equivalent to 139.2ha of the total 164.9ha of land presented in the ELT.

3.11 The vast majority of this land would be capable of being delivered, subject to safeguarding, in the later stages of the Plan period, predominately within Years 11 to 15 (i.e. 2025 to 2030). In light of uncertainty regarding the potential future uses of these longer terms sites, it has been assumed that they would be available for an even mix of office and industrial uses for the purposes of analysis.

3.12 In overall office land terms, 20% is expected to be delivered between Years 0-5, 11% between Years 6-10 and 69% between Years 11-15.

3.13 For industrial land, 7% is expected to be delivered between Years 0-5, 13% between Years 6-10 and 80% between Years 11-15.

3.14 The majority (79%) of non-safeguarded land (for both office and industrial use) is expected to become available for employment development during the first few years of the Plan period, i.e. between Years 0-5/ 2015 and 2020. The remaining 21% is expected to be delivered within Years 6-10.

Implications

3.15 The employment land requirement associated with the baseline scenario of future growth in Crawley to 2030 is equivalent to 57.9ha or an average of 3.9ha per annum between 2015 and 2030. Taken together, the total quantum of employment land identified by the ELT as being available for development in the Borough by 2030 (164.9ha including safeguarded land) would exceed the quantitative baseline requirement for 57.9ha by almost three times. This scenario would however be reliant upon a number of sites that are currently subject to safeguarding coming forward for employment development in the Borough. At the present time, the safeguarded status of these sites means that they cannot be regarded as available for development. Until such time as a decision is made regarding the location of a second runway in the wider South East and future safeguarding requirements, the future role of these sites in accommodating business activity inevitably remains unclear.

3.16 If these sites subject to safeguarding are removed from the ELT, the pipeline supply of employment land over the Local Plan period to 2030 reduces by 84% to 25.8ha. Under this scenario, the pipeline of supply would be insufficient in quantitative terms to accommodate the baseline requirement for 57.9ha of employment land between 2015 and 2030, falling short by 32.1ha or 55%. The pipeline of employment land supply would be largely exhausted within the first five years of the Plan (i.e. 2015 to 2020). Whilst in office terms the quantum of non-safeguarded land would be almost sufficient to accommodate the baseline office land requirement to 2030, the demand for industrial space would fail to be accommodated, with non-safeguarded land capable of accommodating less than a quarter of the baseline industrial land requirement by 2030 in quantitative terms.

3.17 This analysis indicates that the Borough has an adequate pipeline of employment sites to be able to accommodate business needs over the first few years of the 15 year Plan period (i.e. Years 0-5), with the majority of these sites benefiting from an extant planning permission and/or active developer interest. If the total baseline requirement for 57.9ha is compared with the 23.2ha of employment land supply identified over the first 5 years, this would result in a deficit of just under 35ha over the remainder of the plan period[8]. Crawley's ability to accommodate longer term business needs (i.e. over the latter stages

[8] i.e. excluding any other land identified by the ELT for Years 6-10 and 11-15

of the 15 year Plan period) is less certain, with the Borough heavily reliant upon a number of sites currently subject to Gatwick Airport safeguarding (and therefore uncertainty over their potential future use) to meet these needs.

3.18 With regards to specific sites included within the ELT, it should be noted that there is no guarantee that individual permissions and development proposals will be implemented and brought forward over the plan period to contribute towards meeting business needs. It is also important to consider that permissions in the main relate to specific schemes and user/occupier requirements.

3.19 Furthermore, many of the sites included within the ELT are relatively small in size, restricting the scale of development that could be accommodated on individual sites in future. In general terms, land supply identified for the early years of the Plan period predominately comprises of a large number of small sites (in many cases less than 2ha in size). By contrast, employment land supply identified for the latter stages of the Plan period (in particular during Years 11-15) is heavily reliant upon a small number of large sites, which are currently subject to safeguarding, to come forward for development. For example, 86% of the 122ha of employment land identified to come forward during Years 11-15 is accounted for by just two large sites, namely Gatwick Green (58.7ha) and at Land at Rowley Farm (45.8ha).

Conclusions

3.20 The range of updated economic scenarios for Crawley prepared within this EGA update study underlines the Borough's significant potential for growth over the plan period. The baseline employment land requirement for 57.9ha over the 15 year plan period to 2030 effectively represents the minimum objectively assessed need for employment land that the Council should seek to plan for to support economic growth within the local area. The implied scale of B class job growth associated with this updated baseline scenario is broadly comparable with the original 2014 EGA study, notwithstanding the fact that the original and update EGA studies consider slightly different future time horizons.

3.21 When compared with the latest employment land pipeline supply position (as presented in the Council's February 2015 ELT), Crawley would have sufficient employment space in quantitative terms up to 2030 to meet the needs arising from the 'base case' scenario of future requirements, for both office and industrial uses, if sites subject to safeguarding are included within this supply position. However if sites subject to safeguarding are removed from the ELT, the demand/supply balance of employment land would become much tighter, with a potential shortfall of land available for both office and industrial uses, equivalent to 2.9ha and 29.2ha of employment space respectively.

3.22 The analysis indicates that although the Borough has an adequate pipeline of employment sites to be able to accommodate business needs over the first few years of the 15 year Plan period (i.e. Years 0–5) , Crawley's ability to accommodate longer term business needs (i.e. over the latter stages of the 15 year Plan period) is less certain, with the Borough heavily reliant upon a number of sites currently subject to Gatwick Airport safeguarding (and therefore uncertainty over their potential future use) to meet these needs.

Appendix 1 Definition of B Class Sectors

The method used for re-categorising the employment forecasts by sector into B-Class uses is summarised below.

Apportionment of B Class Sectors to Land Uses

Experian Sector	Proportion of Jobs by Use Class		
	B1 office	B2 industrial	B8 warehousing
Agriculture, Forestry & Fishing	Non B-Class		
Extraction & Mining	Non B-Class		
Food, Drink & Tobacco	0%	100%	0%
Textiles & Clothing	0%	100%	0%
Wood & Paper	0%	100%	0%
Printing and Recorded Media	0%	100%	0%
Fuel Refining	0%	100%	0%
Chemicals	0%	100%	0%
Pharmaceuticals	0%	100%	0%
Non-Metallic Products	0%	100%	0%
Metal Products	0%	100%	0%
Computer & Electronic Products	0%	100%	0%
Machinery & Equipment	0%	100%	0%
Transport Equipment	0%	100%	0%
Other Manufacturing	0%	100%	0%
Utilities		11%	
Construction of Buildings	Non B-Class		
Civil Engineering	Non B-Class		
Specialised Construction Activities	0%	57%	0%
Wholesale	0%	22%	78%
Retail	Non B-Class		
Accommodation & Food Services	Non B-Class		
Land Transport, Storage & Post	0%	0%	31%
Air & Water Transport	Non B-Class		
Recreation	Non B-Class		
Media Activities	100%	0%	0%
Telecoms	100%	0%	0%
Computing & Information Services	100%	0%	0%
Finance	100%	0%	0%
Insurance & Pensions	100%	0%	0%
Real Estate	100%	0%	0%
Professional Services	100%	0%	0%
Administrative & Supportive Services	16%	0%	0%
Other Private Services	Non B-Class		
Public Administration & Defence	10%	0%	0%
Education	Non B-Class		
Health	Non B-Class		
Residential Care & Social Work	Non B-Class		

Source: Experian / NLP analysis

Appendix 2 Experian Baseline Forecasts

Experian Sector	Workforce Jobs			
	2015	2030	Change 2015-2030	% Change 2015-2030
Agriculture, Forestry & Fishing	20	10	-10	-50.0
Extraction & Mining	710	770	60	8.5
Food, Drink & Tobacco	60	20	-40	-66.7
Textiles & Clothing	40	10	-30	-75.0
Wood & Paper	70	20	-50	-71.4
Printing and Recorded Media	60	20	-40	-66.7
Fuel Refining	0	0	0	0.0
Chemicals	70	30	-40	-57.1
Pharmaceuticals	90	30	-60	-66.7
Non-Metallic Products	160	50	-110	-68.8
Metal Products	200	70	-130	-65.0
Computer & Electronic Products	2,590	2,450	-140	-5.4
Machinery & Equipment	150	120	-30	-20.0
Transport Equipment	780	640	-140	-17.9
Other Manufacturing	680	310	-370	-54.4
Utilities	1,180	1,550	370	31.4
Construction of Buildings	670	680	10	1.5
Civil Engineering	320	330	10	3.1
Specialised Construction Activities	1,410	1,350	-60	-4.3
Wholesale	5,310	6,880	1,570	29.6
Retail	7,730	8,130	400	5.2
Accommodation & Food Services	14,260	14,180	-80	-0.6
Land Transport, Storage & Post	9,270	10,890	1,620	17.5
Air & Water Transport	6,290	7,380	1,090	17.3
Recreation	1,740	2,210	470	27.0
Media Activities	840	830	-10	-1.2
Telecoms	690	600	-90	-13.0
Computing & Information Services	2,010	1,860	-150	-7.5
Finance	3,800	5,660	1,860	48.9
Insurance & Pensions	390	500	110	28.2
Real Estate	590	600	10	1.7
Professional Services	5,970	6,310	340	5.7
Administrative & Supportive Services	19,170	27,400	8,230	42.9
Other Private Services	890	840	-50	-5.6
Public Administration & Defence	2,480	2,220	-260	-10.5
Education	4,290	4,690	400	9.3
Health	2,270	2,610	340	15.0
Residential Care & Social Work	2,050	2,210	160	7.8
Total	**99,300**	**114,460**	**15,160**	**15.3**

Source: Experian 2014