Economic Evidence Base update

Bridgend County Borough Council

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1 INTRODUCTION

1.1 This report provides an update to the County Borough's 2019 Economic Evidence Base Study (the EEBS). An update is needed because in August 2020 new household and population projections were published by the Welsh Government - the 2018-based projections, replacing the previous 2014 based household projections. The 2014 based projections underpinned both the EEBS and the Preferred Strategy version of the emerging Bridgend Replacement Local Development Plan (LDP) that was consulted upon in Autumn 2019. The next version of the draft plan – the Submission version will need to incorporate the new 2018 based projections.

1.2 The new population projections will have workforce, jobs and economy implications, and therefore could impact on the amount of land the emerging Plan needs to allocate for employment uses. The Preferred Strategy, in line with the EEBS identified 71.7 hectares (ha) of employment land to meet the 60 ha need for employment land over the Plan period to 2033. This update report therefore considers if the need for employment land and the amount of land identified in the emerging Plan remains sufficient.

1.3 Another recent change that also needs to be considered in the context of employment land, is the closure in September 2020 of the Ford Engine Works with the loss of 1,700 jobs (a site of ~45 ha).

1.4 In the Boroughs evidence base the Ford site was assessed as an extant employment use, on a well-located industrial estate. The Council strategy was one where the site would be protected for ongoing use and any investment, redevelopment or newbuild space supported. But with Ford closed and no evidence that the property can or will be occupied 'like for like' the longer term future needs considered.

1.5 There is obviously a large amount of detailed technical work to undertake but; as we discuss below, the site can now be considered an opportunity to possibly provide new modern industrial space to replace job opportunities recently lost.

1.6 Whilst the revised demographic work and also employment data (including forecasts) reflect the most recent trend-based data available at this point of Plan preparation, the trends and forecasts pre-date this very recent closure. – The demographic and labour supply changes will eventually be captured by future projections and forecasts, although the most recent iterations assume that these 1,700 people are still employed on the Ford site. It will take time for the full labour supply impact of this close to be understood. This is especially given Covid is likely to temporarily limit labour mobility and the ability for other firms to take-up any labour released by Ford. But at least in the short term the Council needs to prioritise the reuse or redevelopment of the site to address the recent job losses.

1.7 In this report we firstly summarise the position as set out in the evidence - the EEBS, then review the new demographic data, identifying the changes from the previous projections and considering how this impacts on the economic forecast and the need for jobs and land, and finally consider supply and specifically how the Ford Engine Works should be treated in terms of employment land.

2 THE EVIDENCE BASE

2.1 The EEBS identifies the amount of land needed to meet future possible economic growth in full to 2033. However, the EEBS makes it clear that this is a cautiously optimistic approach because there are lots of uncertainties in the demographic data as we discuss in our review of the EEBS's need calculations below.

2.2 The EEBS shows that future labour demand – the need for jobs generated in the local economy – is low, but this is not an uncommon situation, reflecting a local economy approaching 'full employment'. In terms of the B classes the labour demand analysis shows the overall change in the number of jobs in the local economy, and therefore the requirement for new land over the Plan period, is virtually zero (EEBS table 4.4). This finding is based on an Experian economic forecast, which in turn is based on the Welsh Government principal population projection. The EEBS identifies a gross labour demand for employment land of 2 ha per annum over the plan period by making an adjustment for losses based on past trends

2.3 The total gross demand figure also includes an allowance derived from the labour supply analysis, as provision is also needed for the higher number of workers associated with the higher housing number associated with the alternative PG Short term scenario projection that underpinned the Preferred Strategy and its evidence. The number of workers that flow from this higher housing number was calculated through demographic modelling and not a bespoke economic forecast.

2.4 In summary, the PG Short term scenario identified the need for 505 new dwellings per annum (dpa) compared with the 271 dpa needed to deliver the principal projection, a difference of 234 dpa. The demographic model estimated this uplift would add an additional 219 persons per year to the labour supply. Factoring in a policy-on adjustment to reduce unemployment increases the number of 'employed' to 266 persons per year, which in land terms adds a further 2 ha to the need.

2.5 Thus the overall need – the sum of the land needed to meet the forecast/projection growth and the land needed to provide opportunity for the new workers associated with the higher housing number, is 4 ha per annum, equivalent to 60 hectares (ha) over the Plan period 2018-33.

2.6 As referred to in the introduction there are uncertainties around the demographic evidence[1], and the EEBS sets out three possible scenarios for what could happen, with the conclusion drawn that the County Borough should plan to meet the first and most optimistic of these – that the dwellings are built and occupied by incoming

[1] Paragraph 4.74

households (inward migration), and the labour supply increases as a consequence. While there is no guarantee that economic growth will be triggered by the availability of this increase in labour supply, what is certain is that if the land was not provided then there would be no chance that the possible level of jobs growth would be reached. The County Borough adopted this positive approach in the Preferred Strategy, providing the land recommended in the EEBS to seek to attract new businesses and allow existing businesses to grow, creating the conditions whereby job opportunities could flow to the full.

2.7 Thus, the EEBS recommended that a minimum of 60 ha of land is required to meet future employment needs, and in terms of supply it identified 18 sites that totalled to 71.7 ha to meet this need. The allocation of marginally more land than the assessment of need suggests is required (a positive margin of 11.7 ha or 0.8 ha pa) is pragmatic, as it allows for flexibility and contingency in terms of delivery, as some sites may come forward for mixed or other uses. Equally the need assessed is a minimum, and contingency is needed should take-up exceed the 60 ha.

3 NEW DEMOGRAPHY

3.1 In August 2020 the Welsh Government publish new sub-national household and population projections, and this 2018 based data, rather than the earlier 2014 based sub-nationals, will underpin Local Plan documents going forward.

3.2 Edge Analytics modelled the data using Popgroup to produce a series of new demographic scenarios and forecasts, updating the previous evidence provided to the Council in 2019. This provided a refreshed LDP demographic evidence baseline, to be considered alongside a range of growth scenarios, including trend and housing-led alternatives. As justified in the Strategic Growth Options Background Paper, the PG-Short Term Scenario is still considered to be the most appropriate to achieve an equilibrium between economic growth and sustainable development within the Replacement LDP.

3.3 The PG-Short Term Scenario is grounded in post-recession demographic trends, utilising an ONS 2019 Mid-Year Estimate base year and calibrating its migration assumptions from a 6-year historical period (2013/14–2018/19). Continuing along this trajectory is considered to provide the optimal means of meeting newly forming household need, whilst enabling the attraction and retention of an economically active labour force to counter-balance the naturally ageing population in Bridgend. Overall, the PG-Short Term Scenario projects 9.4% growth in the County Borough's population over the plan period (13,681 from 2018-2033), equating to 496 dwellings per annum. This refreshed scenario therefore projects a level of dwellings that is both akin to, and would still support, the original 505 dwellings per annum identified in the LDP Preferred Strategy. However, what is particularly relevant is the change in age profile between the 2014s and 2018s, as illustrated in Edge's table 17 (copied below). Edge identified higher growth in the 20-44 years age bands in the 2018s, and concluded that this is important because it changes the size of the resident labour force.

Figure 3.1 Population change by age group (Fig 17 from Edge report)

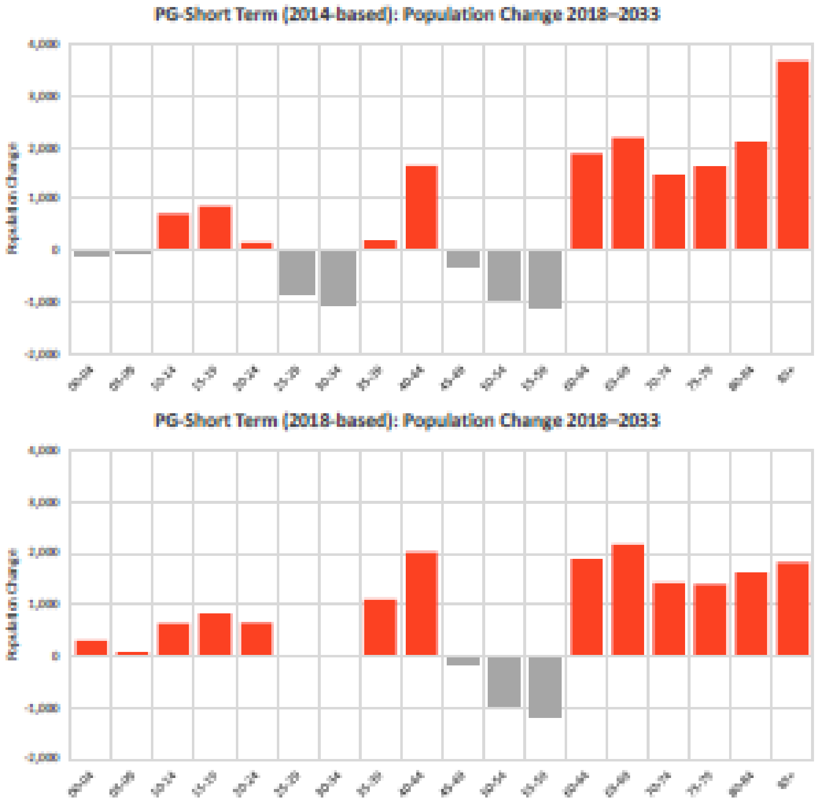


Figure 17: Bridgend – Population Change by Age-Group

3.4 The much higher working age population is boosted in particular by a surge in the 20-24 age group in just one year (2018/19), as shown in the Edge chart Figure 11 (copied below). This is the student cohort returning to Bridgend. While the spike in 2018/19 is surprising and is possibly the product of the change in the way the numbers are counted by the ONS, it is within the official published data, and therefore we have to work with it and plan accordingly.

Figure 3.2 Internal migration age profile (Fig 11 from Edge report)

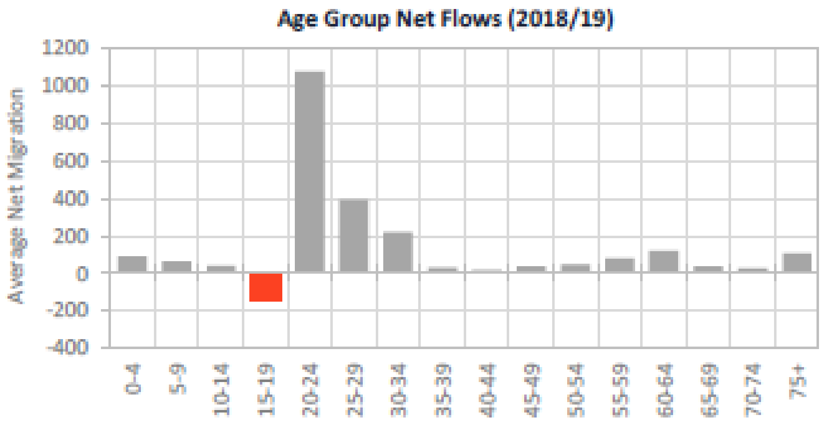


Figure 11: Bridgend – Internal Migration Age Profile 2018/19 only (Source: ONS)

3.5 The higher growth in the younger adult age-groups is particularly important when considering the link between Bridgend's population change and the size and profile of its resident labour force. As outlined in the Edge Demographic Analysis Update Report, this refreshed growth scenario is estimated to have a further impact on workplace based employment, supporting up to 451 employed people per annum.

3.6 However, that estimate is demographics-led, and to test the economic consequences of the new population projection the new scenario needed to be run through an economic forecasting model to get an economics-led estimate. We have worked for many years with the economic forecasters Experian, drawing on their ability to undertake bespoke economic analysis for us, and in this work we were able to commission Experian to use their model to provide an alternative economic scenario, based on the 2018 based PG-short-term migration data.

4 NEW ECONOMIC SCENARIO

4.1 To identify the economic consequences of the new population projections, we commissioned Experian to rerun their economic forecasting model rebased to the Edge 2018-based PG-short-term migration scenario. The purpose of which is to identify the expected economic consequences from this new population.

4.2 Experian's local model can be summarised as the resolution of demand and supply for labour, taking into account commuting flows between local areas, and the local labour force is derived by applying the economic activity rates of those aged 16+. The demand for labour is also modelled by linking local area demand to the regional demand for jobs for each industry sector. Overlain are commuting flows based on historic patterns. A method paper explaining the approach in more detail is appended to this report at Appendix A.

4.3 The modelling creates an economic forecast scenario from the 2018-based PG-short term migration scenario that can be compared to the baseline[2] forecast.

4.4 The 2018-based PG-short term migration scenario generates a rise in total population over the 15 years between 2018-33 of 13,700, but 4,700 of these are associated with growth in the baseline, thus the change in total population over and above the baseline that is attributable to the 2018-based PG-short term migration scenario is 9,200. As shown in the table below, the corresponding change in those aged 16+ is 7,500 employed people (or 500 per annum) over the plan period. So, a little higher than the 451 per annum estimated by Edge, with the difference resulting from the different assumptions made on economic activity rates.

4.5 The key outputs from the comparison of the new 2018 based PG-short-term migration scenario and the 2014 based baseline (scenario versus baseline) are set out in the table below, with the full data set at Appendix B.

[2] The baseline used is the Experian March 2020 that uses the 2014-based WG SNPP.

Table 4.1 Comparison scenario vs baseline – jobs then people

In the scenario, compared to the baseline, by 2033, in net terms:		
There are	1.1 thousand	additional workforce jobs
Of which:		
	0.2 thousand	are taken up as second jobs
	0.9 thousand	are taken up by additional workplace workers
There are	7.5 thousand	additional residents 16+
Of whom:		
	0.9 thousand	take up the additional workplace jobs above
	3.5 thousand	are unemployed
	0.2 thousand	commute out
	2.9 thousand	are economically inactive ('discouraged workers

Source: Experian and Stantec analysis

4.6 The top half of the table considers job demand, this is additional jobs generated by the increase in population and the need to 'service' that population as well as the economic growth opportunities that will flow from the provision of increased labour supply. The bottom half of the table considers the employment status of the people within the additional population.

4.7 The top part of the table shows that the extra population generates 1,100 additional workplace jobs by 2033. As shown on the full dataset table in the Appendix broadly half of these jobs are in public service sectors (500) and accommodation/food/ recreation (100) that are directly related to the increase in overall population. Approaching half of the jobs generated are more likely to be the product of economic growth. As shown in Table 1 above, around one fifth of the jobs (200) do not lead to an employed person, as they are absorbed by double jobbing, where an individual has more than one part time job.

4.8 The scenario generates 7,500 extra residents of working age (16+) - the employed people by 2033. As referred to above 900 of these find employment in Bridgend, but the economic forecaster's view is that the local economy cannot generate sufficient jobs for all, so by 2033 almost half (3,500 people) are added to the total unemployed. Commuting out rises, but only by a relatively minor 200 persons, most likely to jobs in Cardiff and Swansea. The remainder (2,900 people) become economically inactive, these are people who are referred to as 'discouraged workers[3]'.

4.9 So in summary, the economic forecaster's view is that the increase in population generates some increase in labour demand, but this is relatively modest and associated with 'people servicing' activity – health, education etc and generates very little increase in economic activity. The increase in labour supply is offset by a fall in

[3] Discouraged workers are those people discouraged from joining the local labour market by the increase in unemployment, as there is more competition to find employment.

economic inactivity rates and results in higher unemployment and leads to others becoming discouraged workers.

4.10 However, as the EEBS did, and needs to be done again in light of this new demographic baseline, enough land needs to be made available to ensure that there is opportunity for economic growth to provide employment opportunity for all those people who will otherwise become economically inactive. The Council needs to plan on the basis that businesses will wish to expand and/or set up in Bridgend as a consequence of the increase in labour supply, leading to the Borough returning to virtual full employment. Thus the next step in this review is to identify how much land is required to accommodate these additional people, so as to ensure that the amount of employment land allocated is sufficient not to constrain the economic growth required to provide job opportunities for all these people.

5 THE EMPLOYMENT LAND REQUIREMENTS

5.1 The LDP has effectively two built-in buffers that could accommodate some of the additional need. Firstly the 2 ha pa allowance for the additional housing and reduced unemployment. This 2 ha allowance has a little flexibility built-in, and could possibly accommodate more than the 266 workers identified in the Preferred Strategy. Secondly the employment land allocation has a buffer of 11.7 ha (ie 71.7- 60 ha), that averages to 0.8 ha pa. In this section we review to what extent these buffers that total to 2.8 ha pa can absorb the growth in employed workers, the unemployed and discouraged workers.

5.2 Firstly, those in the new demographic data that are forecast to be employed in B class activity and will therefore require employment floorspace/land. This group are the 1,100 who are forecast to find work. However, not all of these will be employed in B class activity requiring additional land. Many will be in non-B class activities servicing the growing population, such as in public services and leisure activities. In rounded terms 600 of these jobs are in activities that could require B use class accommodation, such as: construction (100), wholesale and retail (200), and transport/storage, information/comms and professional (each 100)[4].

5.3 Not all of these 600 jobs will require B class land and floorspace - office, industrial/manufacturing or warehouse space, as we know from the EEBS that some of these jobs will be absorbed into non-B class use activity. However, we err on the cautious side and plan for a scenario where all these jobs, all 600 by 2033 are accommodated in B class space. Table 2 below calculates the land requirement for the 600 new B class workers.

5.4 In Table 2 we apply the same 1:24 sq m ratio used in the EEBS, which produces a floorspace requirement of 14,400 sq m that at a plot ratio of 40% (40:60 is a standard plot ratio for industrial/warehouse activity, albeit a little low for office (again reflecting a cautious approach) – where 40% of the area is used for floorspace and

[4] Full list provided at Appendix B

60% for outdoor circulation, servicing and parking. At this plot ratio 3.6 ha are required over the course of the plan period to accommodate these additional worker jobs, which averages to 0.2 ha per annum.

Table 5.1 Additional B class workers

a	Additional workers (2018-33)	600
b	Job density (sq m / worker)	24
c	Total Sq m [a*b]	14,400
d	Land (ha) (40% plot ratio) [c/4,000]	3.6
e	**Land per annum** [d/15]	**0.2**

Source: Experian and Stantec analysis

5.5 Next, we apply the same approach for those the economic forecast thinks will not find work, and will be unemployed. The new forecast identifies 3,500 additional unemployed, and our assessment plans to provide jobs for all of these, calculating how much land is needed to do this. Thus this presents a maximum possible land requirement, but given the non-B class public sector jobs associated with the increased population have already been accounted for by carrying forward 600 workers and not the full 1,100, it is likely that most of the jobs generated by this potential workforce would be in the B class sectors and require land. Land needed to provide the economic stimulus for businesses to set up and expand in Bridgend.

5.6 The calculation in Table 3 below follows that set out in Table 2 above, and identifies a requirement for 84,000 sq m, and a land requirement of 21 ha over the course of the plan period, which averages to 1.4 ha per annum.

Table 5.2 The unemployed

a	Unemployed (2018-33)	3,500
b	Job density (sq m / worker)	24
c	Total Sq m [a*b]	84,000
d	Land (ha) (40% plot ratio) [c/4,000]	21
e	**Land per annum** [d/15]	**1.4**

Source: Experian and Stantec analysis

5.7 Next, taking the same approach, in Table 4 we factor in the final element - the 2,900 discouraged workers. The land requirement to provide job opportunity for the discouraged workers calculates to 1.2 ha.

Table 5.3 Discouraged workers

a	Discouraged workers (2018-33)	2,900
b	Job density (sq m / worker)	24
c	Total Sq m [a*b]	69,600
d	Land (ha) (40% plot ratio) [c/4,000]	17
e	**Land per annum** [d/15]	**1.2**

Source: Experian and Stantec analysis

5.8 In combination these three elements of uplift in population require 2.8 ha (0.2 plus 1.4 plus 1.2 ha). This balances with the available land (2 ha plus the 0.8 ha buffer), meaning in absolute terms there is no shortfall in provision. However, this position would mean no flexibility in the balance between demand and supply, and absolutely no scope, certainly in the short term, for any losses in the existing stock or in the supply. We consider this position in the next section.

Conclusions on need and land balance

5.9 Based on the uplift in workers from the 2018-based PG-short term migration scenario and calculated by the Experian economic forecast model, a total of 7,500 people will be available for work. Only 1,100 of these are likely to find work, with a further 3,500 unemployed and 2,900 becoming discouraged workers. We know the sectors where the 1,100 jobs will be generated, and only 600 at the most will be in B class sectors, the sectors that generate a land requirement. We also know that not all of the unemployed or discouraged workers will find work in B class activity, but we cannot be sure, and we present a 'worst case' that all these people find B class employment rather than non-B class non-land requiring jobs. The calculations above show that these three categories in combination need 2.8 ha per annum of land to meet this need.

5.10 The supply of land in the pipeline is the 2 ha pa set aside to meet worker growth associated with the higher housing target and the 0.8 ha pa in the buffer of sites to meet the need - totalling 2.8 ha. Thus, to provide economic opportunity to all the additional 16+ population within the new 2018-based PG-short term migration scenario projection requires no additional land over the 15 year plan period.

5.11 This tight balance of demand and supply (no margin) compared to the position set out in the EEBS, does mean there is no room for flexibility, and certainly in the short term no room for losses in stock or supply. Much depends on what form of B class activity comes forward. The average worker density at 24 sq m per worker is double what would be expected for office-based employment, and half that expected for industrial related employment. Given that there are likely to be more office based opportunities, as generally in local economies that is the pattern, there could be more flexibility in the mid-longer run, but this will not be evident in the short term.

6 SUPPLY OF LAND

6.1 With demand and supply balancing, there is a lack of flexibility in the available supply, and two things are clear. Firstly, all of the sites allocated for employment use need to be retained, and secondly there is a need to look for opportunities to boost supply to provide some necessary flexibility, to allow for situations where existing allocations take longer than anticipated to come forward, or demand for employment land is stronger than anticipated.

6.2 In respect of the first issue we next consider one of the 18 sites proposed for allocation because we know there is interest in the pursuit of this site - Ty Draw Farm - for other uses (as there was at the time the EEBS was prepared), and then we discuss the major opportunity that flows from the closure of the Ford Engine Works at Waterton.

Ty Draw Farm, Pyle

6.3 The EEBS considered this long-standing strategic site allocation. At that time (2018/19) the majority of the site had already been developed for residential, and Lambert Smith Hampton were marketing the remaining 2.23 ha site for B1 activity. The EEBS acknowledged that office / light industrial or hybrid flexible space may take some time to deliver because of the comparatively weak commercial market in that area, there were a number of reasons to retain the employment allocation, albeit as part of the general allocation rather than as a strategic site. In the context of the updated demographics the key reasons to continue to retain the site as an employment allocation can be summarised as:

- The County Borough has moved from a position of having a safety margin / buffer in its employment land supply, to no margin at all. There is no scope to deallocate sites that are suitable and available for employment use.
- While there may have been sufficient industrial floorspace and land in Pyle in the past, over the last five or so years industrial vacancy rates have tumbled, and in 2019 vacancy was at an unprecedented zero rate, indicating a very healthy market,
- The new access road (Cilgant Y Lein) and access points now provided make easy access to the A48/M4. It is noteworthy that the promoter of the 2014 mixed use scheme considered the provision of enabling infrastructure could well encourage commercial interest in the site in the future. Now the road and access points have been delivered we may see renewed interest.
- The site promoter refers to possible residential amenity issues resulting from the shared access road. But this is a 2.23 ha site that will attract relatively small scale light industrial or flexible light industrial/office space that are compatible uses with residential and will have only modest requirements for large vehicles and the volumes will be comparatively low, and access in and out of the site can be separated.

- The site promoter also refers to previous comments from the Borough and WDA that the site lacks prominence due to a dense woodland buffer on the boundary with the A4229 that links to the A48. While this may have been a factor when the site was a lot larger and capable of accommodating bigger corporate entities, the site is now of modest scale (2.23 ha), which means that the type of office/light industrial activity that may come forward are more likely to service the local community, in respect of which the type of prominence required is different. The new access road links the site to the new residential area to the south, and the rising ground and more modest landscape buffer on the western flank means the site actually has reasonable prominence from School Terrace that links to the wider community of North Cornelly beyond. We are aware of many local light industrial sites that have far less prominence than this site will offer.
- To the east is a candidate site for a 100 ha SUE, known as Land East of Pyle. As the promoter of the Ty Draw Farm site identifies, the SUE site has high prominence from both the A4229 and the M4, and also the potential for direct access onto the M4 (via the A4229). The site is being promoted for mixed use including residential, education, recreation and appropriate community facilities and commercial uses, which could include some small scale light industrial or office activity serving local market needs. Our view is that should the SUE come forward as an allocation, and there is no guarantee of this, given that supply is limited as evidenced by the zero per cent availability, there will still be a need for a smaller site like Ty Draw Farm to cater for the smaller scale local servicing needs. If the SUE does not come forward Ty Draw Farm is the only supply in the area.

6.4 Thus, the EEBS in 2019 considered this site was needed for employment uses, and should not be released for other uses, and that remains our view. The current position and the higher need requirement has made the situation more acute, and more land, not less is now needed to meet the need, and the Borough cannot afford to lose neither sites in existing employment use nor allocated sites.

Ford Engine Works, Waterton

6.5 The closure of the Ford Engine Works on the Waterton Industrial Estate in September 2020, with the loss of 1,700 jobs was a significant blow to Bridgend’s economy that now must be quickly turned into an opportunity to offer business space to existing and new businesses. It has also resulted in the ‘release’ of a skilled workforce that the Borough needs to seek new opportunities to retain these skills in the area.

6.6 The closure comes at a time when there are major structural changes taking place in the automotive sector, and in particular the advent of electric cars, which is generating opportunities as existing and new players look for new manufacturing capacity. There is evident interest from the automotive sector in the area and its skilled workforce, albeit the Ineos Automotive interest to build its new Grenadier car next to the Ford Plant did not progress. However, elsewhere in the sub-region

British Volt recently announcing plans for a ‘gigafactory’ car battery plant at the Welsh Government owned former Bro Tathan RAF base at St Athan, which will occupy a recently cleared site next to the new Aston Martin factory. Given the emerging battery technology, this may not be the end of such opportunities, and provides a realistic mid-longer term opportunity for the Ford Works site.

6.7 As noted in the introduction this recent closure is not yet reflected in the Council’s demographic evidence and the employment land evidence assumed Ford would continue to occupy their site. So the demographic evidence does not ‘know’ the possible labour supply has increased by 1,700 people and the employment evidence does not know that a 45 ha site has now become available for redevelopment.

6.8 At the time of writing we understand that detailed work is being undertaken by the site owners to help inform a future strategy. It is also likely that the Welsh Government may either have a view as to the sites future and/or assist in delivery of new space. Redevelopment is the most likely outcome but this is still being tested. So the Council is in the difficult position of pre-empting this further work in order to provide a policy direction in the next plan.

6.9 As a site the site this has many advantages – it is a large regular serviced site extending to ~45 ha, within one of the County Borough’s premier industrial estates with all the opportunities for supply chain linkages, proximity to other businesses, and it has access to a highly skilled labour force and good access to the motorway. The Waterton Estate is attractive to industrial and warehouse occupiers, and since 2015 has achieved consistently very low vacancy rates of 2% or lower (in last quarter 2018 it fell to just 0.5%), half the average Bridgend rate. At the end of 2018 just five units were available. So – there is a very strong rationale to keep the site in the Borough’s employment portfolio.

6.10 But there is also a rationale to ensure that a future economic opportunity is not lost and the economic prospects for the 45 ha of land maximised. This this policy thrust, looking at the site as an opportunity, was not the original intention of the plans current allocation for this site. The need to see the site as an opportunity is only strengthened given the tight market and limited supply we discuss earlier. If the full 45ha was redeveloped for modern industrial uses it likely that it could accommodate more space, and employ more people than the 1,700 previously on site.

6.11 This would suggest minor changes to reflect the fact the Council will be looking not only to manage the site in line with an employment protection policy but actively seek opportunities to address the tight industrial land balance discussed above.

6.12 So, for the emerging plan we think two policy options need to be explored – while the detailed future of the site is addressed.

6.13 Firstly - given the shortage of built stock in the Borough the Council should not overlook the prospect that at least some of the buildings can be re-used and re-configured as cost efficient space for new firms – even as a ‘meanwhile’ use pending redevelopment. If even only a small proportion/number of buildings can be reused in this way they will still help address the shortage of stock in the Borough – and provide some 'headroom' to manage the tight land/supply balance discussed earlier.

6.14 Secondly, the plan should move to consider the site as a new development opportunity – effectively considering the land as new supply. The jobs previously on site have been lost and the building no longer has an economic purpose (setting aside 'meanwhile' reuse where possible). As a development opportunity the site has scope to make a much larger economic impact (in terms of jobs supported) than the old use. Further work is needed to confirm how much new space, of what type and mix but the sites location and previous economic history would support the Council looking to maximise the economic opportunity of the site as a matter of priority.

6.15 A positive redevelopment policy, looking for new industrial units can only strengthen the case for public assistance in the future – as noted above the site is well located, there is a skilled workforce in the market, but a lack of market developable supply.

7 SUMMARY

7.1 The new Welsh Government demographic data - the 2018-based PG-short term migration scenario - introduces a large uplift in the working age population in Bridgend. This is principally a consequence of changes in the calculation of returning student cohorts, but is now the official published data.

7.2 The objective of this paper is to identify the economic consequences of the increase in population, and to see whether the need assessment and land supply identified in the EEBS remain sufficient for the Submission Plan.

7.3 The EEBS took a very cautious approach to the need and land supply assessment for a number of reasons explained in this report and also in chapter 4 of the EEBS, and this review found that on that basis there is some flexibility in the EEBS need calculation, and in the land supply. The EEBS need assessment includes a 2 ha pa allowance for the higher labour supply flowing from the higher housing target linked to the 2014 PG-short term migration scenario, and the supply has a 0.8 ha pa margin – a total 2.8 ha pa margin.

7.4 The new 2018-based PG-short term migration scenario was loaded into Experian's economic forecasting model, and the additional population (net of the increase in the baseline) by 2033 generated 7,500 extra people of working age (16+) referred to as 'employed people', of which just 900 find employment in Bridgend, 200 persons commute out for work, almost half (3,500 people) become unemployed, and the remainder (2,900 people) become discouraged workers.

7.5 The aim of this update paper, as with the EEBS is to ensure enough land is identified in the LDP so as not to constrain opportunities for all to find employment, including the unemployed and those discouraged workers. This collectively sums to 2.8 ha pa, and matches the available supply (2.8 ha). Thus, demand and supply are in balance, but with absolutely no flexibility.

7.6 There is a need for some flexibility, and a need for a margin, perhaps not in the short term, albeit meanwhile use could be achievable in the short term, but certainly in the mid to longer term. This could and should be addressed by redevelopment on the now vacant Ford Engine Works site, on one of the Borough's premier industrial estate. The site has theoretical capacity to accommodate more new jobs than the 1,700 lost.

7.7 Thus, we conclude that the economic impacts of the increase in working age population identified in the new Welsh Government demographic data (the 2018-based PG-short term migration scenario) can be satisfactorily accommodated in the short term by the flexibility and margin built into the EEBS. But this requires retention of all of the proposed allocated land, and in the mid to longer term enabling the Ford Works site to be available for future employment uses to the 1,700 jobs are at least replaced the economic opportunity maximised.

APPENDIX A EXPERIAN METHOD STATEMENT

Experian Local Economic Model Scenario – Bridgend (November 2020)

Overview of Experian's local forecast methodology

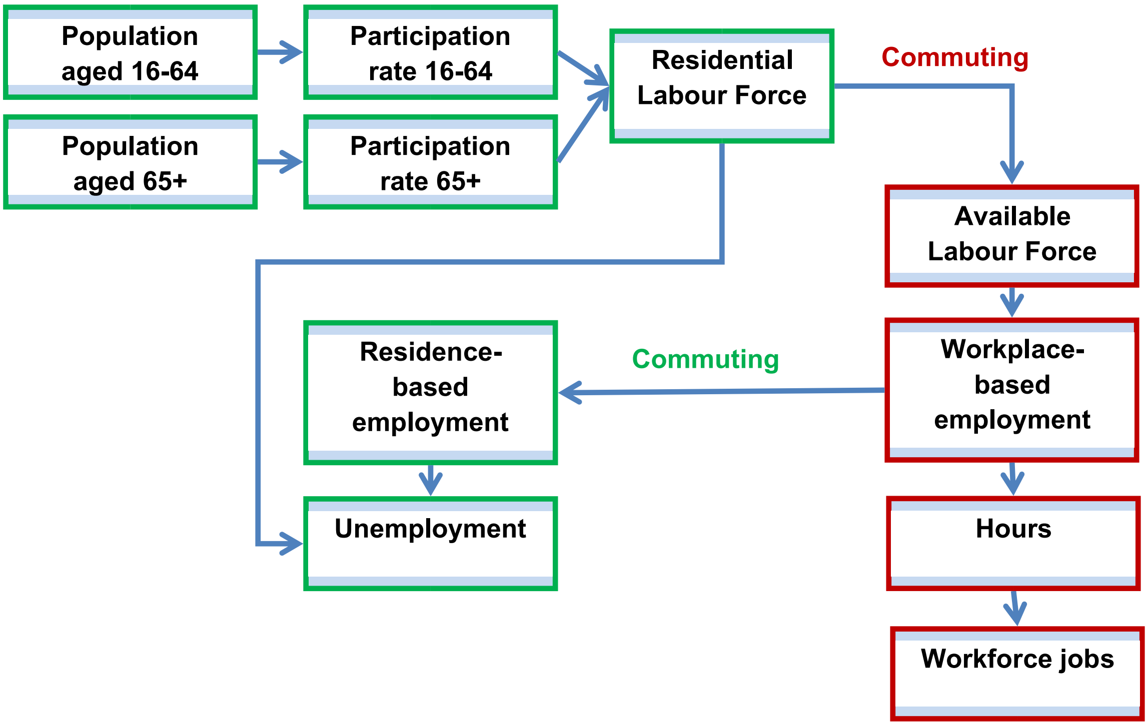
Experian adopts a 'top-down' approach to produce forecasts at the regional and local authority level. At all stages, the national macroeconomic forecast is the main control, followed by the regional forecast. The starting point for our forecasts is a very wide range of historical economic data that is collected at a highly disaggregated level and covers all the major economic indicators published by the Office for National Statistics.

Experian's local model is based on the resolution of demand and supply for labour and takes into account commuting between local areas within a region and across the regional boundary. The starting point is to replacement Experian's baseline population forecast, which is consistent with 2014-based Sub-National Population Projection (SNPP), with an alternative set of population forecast supplied by the client. The local labour force is then derived by applying the economic activity rates of those aged 16-64 and 65-plus to the population.

In parallel, demand for labour is estimated. This is achieved at the industry level by linking job growth in a local area to growth in the same industry at the regional level and then constraining demand for jobs by industry to demand for jobs for the same industry at the regional level.

In the final stage, the commuting flow acts to balance between the demand and supply of labour within a region. The inflow and outflow of workers across the regional boundary is shared out between local areas according to their historic commuting patterns.

The flow chart below illustrates the relationship between workplace-based variables (red outlined boxes) or residence-based variables (green-outlined boxes). Workplace-based and residencebased variables are linked by commuting relationships derived from the 2011 Census.



Overview of assumptions for the scenarios

Experian generated an alternative economic scenario in addition to the baseline forecasts from the Regional Planning Service (RPS) as summarised in the table below.

Economic scenario	Scenario Assumption
Population scenario	Client provided population by age
Experian baseline	Experian RPS March 2020

Synopsis of the scenario result

Scenario:

In this scenario, the population has been altered in line with the projections provided by the client. The total population in Bridgend is nearly 9,200 greater than the baseline forecast in 2033, majority of whom are adults in working age (age 16-64).

The increase in population in Bridgend has led to an increase in labour demand (particularly in public services). This increase is substantially smaller than the increase in population. At the same time, the increase in population leads to an increase in labour supply. However, this increase in labour supply is offset by a fall in economic activity rates. Economic activity rates are lower especially amongst working age adults since the increase in job demand is less than the increase in the labour force resulting in higher unemployment; higher unemployment discourages people from joining the local labour market as there is more competition to find employment. Economic policies which help stimulating job demand is needed to lower local unemployment rates closer to our baseline.

In conclusion, Bridgend is not labour market constrained under the Experian baseline, the higher population growth introduced in this scenario results in rising unemployment and a reduction in economic activity rates relative to the baseline.

APPENDIX B

EXPERIAN NEW ECONOMIC SCENARIO (RAW DATA)

BRIDGEND BASELINE

Local/Combined	Variable Name	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
Bridgend	Labour Force	67.50	69.00	69.00	67.50	68.70	69.60	68.60	69.90	69.20	69.10	69.00	68.90	68.80	68.80	68.80	68.80	68.90	69.00	68.90	68.90	68.80	68.80	68.70
Bridgend	Labour Force - 16 to 64	66.20	67.80	67.80	65.90	66.80	67.60	66.80	68.00	67.20	67.20	66.90	66.70	66.50	66.30	66.10	65.90	65.70	65.50	65.30	65.00	64.80	64.50	64.30
Bridgend	Labour Force - 65 Plus	1.30	1.20	1.20	1.60	1.90	1.90	1.80	1.90	1.90	2.00	2.10	2.20	2.30	2.50	2.60	2.90	3.10	3.40	3.70	3.90	4.10	4.30	4.50
Bridgend	Population - retired	29.70	30.10	29.80	29.70	29.30	29.20	29.40	29.60	29.50	28.90	29.10	29.50	30.00	30.50	31.10	31.40	31.10	31.00	31.60	32.30	33.00	33.70	34.40
Bridgend	Population - student	25.40	25.50	25.50	25.50	25.60	25.80	25.80	25.90	26.10	26.20	26.30	26.40	26.40	26.40	26.50	26.40	26.30	26.10	26.00	25.90	25.80	25.70	25.70
Bridgend	Population - 16 Plus	113.90	114.30	115.00	115.80	116.70	117.60	118.30	118.80	119.20	119.70	120.10	120.40	120.80	121.10	121.40	121.70	122.10	122.50	122.90	123.20	123.40	123.60	123.70
Bridgend	Population - 16 to 64	88.90	88.40	88.40	88.50	88.80	89.20	89.40	89.40	89.30	89.40	89.30	89.20	89.00	88.70	88.40	88.00	87.80	87.40	87.00	86.60	86.10	85.60	85.10
Bridgend	Population - 65 Plus	25.00	25.90	26.60	27.40	27.90	28.40	28.90	29.40	29.90	30.30	30.80	31.30	31.80	32.40	33.00	33.70	34.40	35.10	35.80	36.60	37.30	38.00	38.60
Bridgend	Total Population	139.30	139.80	140.50	141.30	142.30	143.40	144.10	144.70	145.30	145.90	146.40	146.80	147.20	147.50	147.80	148.10	148.40	148.60	148.90	149.00	149.20	149.30	149.40
Bridgend	Working Age Population	84.20	84.20	85.20	86.20	87.40	88.40	88.90	89.20	89.80	90.80	91.00	90.90	90.80	90.60	90.30	90.30	91.00	91.50	91.20	90.80	90.40	89.90	89.30
Bridgend	Economic Activity Rate (%) - 16+	59.20	60.40	60.00	58.30	58.90	59.20	58.00	58.90	58.00	57.80	57.50	57.20	57.00	56.80	56.60	56.50	56.40	56.30	56.10	55.90	55.80	55.70	55.60
Bridgend	Economic Activity Rate (%) - 16 to 64	74.40	76.70	76.70	74.50	75.20	75.90	74.70	76.10	75.30	75.20	74.90	74.80	74.80	74.80	74.80	74.90	74.90	75.00	75.00	75.10	75.20	75.30	75.50
Bridgend	Economic Activity Rate (%) - 65 Plus	5.30	4.70	4.50	5.80	6.80	6.80	6.10	6.50	6.50	6.40	6.70	7.00	7.30	7.60	8.00	8.50	9.10	9.70	10.20	10.60	10.90	11.30	11.60
Bridgend	Workforce Jobs	61.30	61.60	62.30	64.60	65.40	66.00	64.90	65.90	66.30	66.60	66.70	66.80	67.00	67.10	67.20	67.30	67.50	67.60	67.80	67.80	67.90	67.90	67.90
Bridgend	Jobs Demand	61.30	61.60	62.30	64.60	65.40	66.00	64.90	65.90	66.30	66.60	66.70	66.80	67.00	67.10	67.20	67.30	67.50	67.60	67.80	67.80	67.90	67.90	67.90
Bridgend	Excess Jobs	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Bridgend	FTE jobs	47.10	49.10	50.00	50.60	51.50	56.00	53.30	53.30	53.70	53.40	53.30	53.30	53.20	53.30	53.30	53.30	53.20	53.20	53.00	52.90	52.80	52.70	52.60
Bridgend	Workplace based employment	60.60	61.20	62.00	63.80	63.90	64.40	64.70	65.50	65.80	66.10	66.10	66.20	66.20	66.20	66.20	66.20	66.30	66.30	66.30	66.20	66.20	66.10	66.00
Bridgend	Residence based employment	61.60	63.00	64.00	63.10	64.60	66.50	65.30	67.00	66.50	66.50	66.50	66.60	66.60	66.70	66.70	66.70	66.70	66.80	66.80	66.70	66.70	66.60	66.50
Bridgend	Net commuting balance (inflow)	-1.00	-1.80	-2.00	0.70	-0.70	-2.10	-0.60	-1.50	-0.70	-0.40	-0.40	-0.40	-0.40	-0.50	-0.50	-0.50	-0.40	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50
Bridgend	Unemployment	5.90	6.00	5.00	4.30	4.00	3.10	3.30	2.90	2.70	2.60	2.50	2.30	2.20	2.10	2.10	2.10	2.10	2.20	2.20	2.10	2.20	2.20	2.20
Bridgend	Unemployment Rate	8.70	8.70	7.30	6.40	5.80	4.40	4.80	4.20	3.90	3.80	3.60	3.30	3.20	3.10	3.00	3.00	3.10	3.20	3.20	3.10	3.10	3.20	3.20
Wales	Workforce Jobs	1,372	1,378	1,385	1,437	1,455	1,465	1,455	1,478	1,491	1,501	1,507	1,512	1,517	1,522	1,527	1,533	1,540	1,546	1,551	1,555	1,558	1,561	1,564
United Kingdom	Workforce Jobs	31,695	32,066	32,429	33,462	33,986	34,550	34,889	35,095	35,694	35,936	36,139	36,340	36,537	36,727	36,918	37,124	37,346	37,578	37,784	37,953	38,124	38,288	38,432
Bridgend	Agriculture, Forestry & Fishing WFJ	0.4	0.4	0.4	0.5	0.5	0.5	0.6	0.6	0.5	0.5	0.5	0.5	0.5	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Bridgend	Extraction & Mining WFJ	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Bridgend	Manufacturing WFJ	7.8	8.0	8.2	8.8	8.8	8.8	8.7	9.0	9.1	8.9	8.7	8.5	8.3	8.1	7.9	7.7	7.6	7.4	7.2	7.0	6.8	6.7	6.5
Bridgend	Utilities WFJ	0.8	0.8	0.7	0.7	0.8	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5
Bridgend	Construction WFJ	4.7	4.3	4.4	4.7	4.8	5.2	4.8	5.1	5.2	5.2	5.3	5.3	5.4	5.4	5.5	5.5	5.6	5.6	5.7	5.7	5.8	5.8	5.8
Bridgend	Wholesale & Retail WFJ	10.0	10.2	10.1	9.8	10.3	10.2	9.4	9.4	8.8	8.8	8.8	8.8	8.8	8.8	8.8	8.8	8.8	8.8	8.7	8.7	8.7	8.7	8.6
Bridgend	Transport & storage WFJ	2.0	1.9	1.9	2.1	2.1	2.0	1.9	2.2	2.3	2.4	2.4	2.4	2.4	2.4	2.4	2.4	2.4	2.4	2.4	2.4	2.4	2.4	2.4
Bridgend	Accommodation, Food Services & Recreation	4.5	4.9	4.7	4.8	5.0	5.4	5.2	5.1	5.6	5.6	5.6	5.6	5.6	5.6	5.6	5.6	5.6	5.6	5.6	5.6	5.6	5.6	5.6
Bridgend	Information & communication WFJ	1.5	1.6	1.7	2.0	2.1	2.3	2.5	2.5	2.5	2.6	2.7	2.7	2.8	2.8	2.9	2.9	3.0	3.0	3.1	3.2	3.2	3.3	3.4
Bridgend	Finance & Insurance WFJ	0.8	0.8	0.8	0.7	0.7	0.7	0.7	0.7	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8
Bridgend	Professional & Other Private Services WFJ	8.5	8.4	8.8	9.5	9.6	9.5	9.8	10.3	10.3	10.5	10.6	10.6	10.6	10.7	10.8	10.8	10.9	10.9	11.0	11.1	11.1	11.2	11.2
Bridgend	Public Services WFJ	20.2	20.3	20.7	21.0	20.6	20.8	20.6	20.5	20.6	20.8	21.0	21.1	21.3	21.5	21.6	21.8	22.0	22.1	22.3	22.4	22.5	22.6	22.7

BRIDGEND SCENARIO

Local/Combined	Variable Name	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
Bridgend	Labour Force	67.50	69.00	69.00	67.50	68.70	69.60	68.60	69.90	70.00	70.10	70.30	70.50	70.70	70.90	71.20	71.50	71.70	72.20	72.40	72.60	72.80	73.00	73.30
Bridgend	Labour Force - 16 to 64	66.20	67.80	67.80	65.90	66.80	67.60	66.80	68.00	68.10	68.10	68.20	68.30	68.40	68.50	68.60	68.70	68.70	68.90	68.90	68.90	68.90	69.00	69.10
Bridgend	Labour Force - 65 Plus	1.30	1.20	1.20	1.60	1.90	1.90	1.80	1.90	1.90	2.00	2.10	2.20	2.30	2.40	2.60	2.80	3.00	3.30	3.50	3.70	3.90	4.00	4.20
Bridgend	Population - retired	29.80	30.00	29.80	29.60	29.30	29.20	29.50	29.50	29.40	28.60	28.90	29.20	29.60	30.10	30.60	30.80	30.50	30.40	31.00	31.60	32.20	32.90	33.50
Bridgend	Population - student	25.40	25.50	25.50	25.50	25.60	25.80	25.90	26.10	26.30	26.60	26.80	27.00	27.10	27.20	27.40	27.50	27.40	27.30	27.30	27.20	27.30	27.30	27.30
Bridgend	Population - 16 Plus	114.10	114.20	115.00	115.80	116.70	117.60	118.40	118.80	120.80	121.50	122.20	122.90	123.60	124.40	125.10	125.80	126.70	127.60	128.40	129.20	129.80	130.60	131.20
Bridgend	Population - 16 to 64	89.00	88.40	88.40	88.40	88.80	89.20	89.40	89.40	90.90	91.20	91.60	91.90	92.20	92.40	92.60	92.70	92.90	93.10	93.20	93.30	93.30	93.40	93.40
Bridgend	Population - 65 Plus	25.00	25.90	26.60	27.40	27.90	28.50	28.90	29.40	29.90	30.20	30.60	31.00	31.40	32.00	32.50	33.20	33.90	34.50	35.20	35.90	36.50	37.20	37.80
Bridgend	Total Population	139.40	139.80	140.50	141.30	142.30	143.40	144.30	144.90	147.00	148.00	149.00	149.90	150.80	151.60	152.50	153.30	154.10	154.90	155.70	156.40	157.10	157.80	158.60
Bridgend	Working Age Population	84.20	84.20	85.20	86.20	87.40	88.40	88.90	89.20	91.40	92.80	93.30	93.70	94.00	94.30	94.50	95.00	96.20	97.20	97.40	97.60	97.60	97.70	97.70
Bridgend	Economic Activity Rate (%) - 16+	59.20	60.40	60.00	58.30	58.90	59.20	57.90	58.90	57.90	57.70	57.50	57.40	57.20	57.00	56.90	56.80	56.60	56.60	56.40	56.20	56.10	55.90	55.90
Bridgend	Economic Activity Rate (%) - 16 to 64	74.30	76.70	76.70	74.50	75.20	75.90	74.70	76.10	74.90	74.70	74.40	74.30	74.20	74.10	74.10	74.10	74.00	74.00	73.90	73.90	73.90	73.90	74.00
Bridgend	Economic Activity Rate (%) - 65 Plus	5.30	4.70	4.50	5.80	6.80	6.80	6.10	6.50	6.50	6.50	6.70	7.00	7.30	7.60	7.90	8.40	9.00	9.60	10.00	10.30	10.60	10.90	11.10
Bridgend	Workforce Jobs	61.30	61.60	62.30	64.60	65.40	66.00	64.90	65.90	66.50	66.80	67.10	67.20	67.40	67.60	67.70	68.00	68.20	68.40	68.60	68.70	68.90	69.00	69.00
Bridgend	Jobs Demand	61.30	61.60	62.30	64.60	65.40	66.00	64.90	65.90	66.50	66.80	67.10	67.20	67.40	67.60	67.70	68.00	68.20	68.40	68.60	68.70	68.90	69.00	69.00
Bridgend	Excess Jobs	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Bridgend	FTE jobs	47.10	49.10	50.00	50.60	51.50	56.00	53.30	53.30	53.80	53.60	53.60	53.60	53.60	53.70	53.70	53.80	53.80	53.80	53.70	53.60	53.50	53.50	53.40
Bridgend	Workplace based employment	60.60	61.20	62.00	63.80	63.90	64.40	64.70	65.50	65.80	66.20	66.30	66.40	66.50	66.50	66.60	66.70	66.80	66.80	66.90	66.90	66.90	66.90	66.90
Bridgend	Residence based employment	61.60	63.00	64.00	63.10	64.60	66.50	65.30	67.00	66.50	66.50	66.70	66.90	67.10	67.10	67.20	67.30	67.40	67.50	67.60	67.60	67.60	67.60	67.60
Bridgend	Net commuting balance (inflow)	-1.00	-1.80	-2.00	0.70	-0.70	-2.10	-0.60	-1.50	-0.70	-0.30	-0.40	-0.50	-0.60	-0.60	-0.60	-0.60	-0.60	-0.70	-0.70	-0.70	-0.70	-0.70	-0.70
Bridgend	Unemployment	5.90	6.00	5.00	4.30	4.00	3.10	3.30	2.90	3.50	3.60	3.60	3.60	3.60	3.80	4.00	4.20	4.30	4.70	4.80	5.00	5.20	5.40	5.70
Bridgend	Unemployment Rate	8.70	8.70	7.30	6.40	5.80	4.40	4.80	4.20	5.00	5.10	5.10	5.10	5.10	5.40	5.60	5.90	6.00	6.50	6.60	6.90	7.10	7.40	7.80
Wales	Workforce Jobs	1,372	1,378	1,385	1,437	1,455	1,465	1,455	1,478	1,491	1,501	1,507	1,512	1,517	1,522	1,527	1,533	1,540	1,546	1,551	1,555	1,558	1,561	1,564
United Kingdom	Workforce Jobs	31,695	32,066	32,429	33,462	33,986	34,550	34,889	35,095	35,694	35,936	36,139	36,340	36,537	36,727	36,918	37,124	37,346	37,578	37,784	37,953	38,124	38,288	38,432
Bridgend	Agriculture, Forestry & Fishing WFJ	0.4	0.4	0.4	0.5	0.5	0.5	0.6	0.6	0.5	0.5	0.5	0.5	0.5	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Bridgend	Extraction & Mining WFJ	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Bridgend	Manufacturing WFJ	7.8	8.0	8.2	8.8	8.8	8.8	8.7	9.0	9.1	8.9	8.7	8.5	8.3	8.1	8.0	7.8	7.6	7.4	7.2	7.1	6.9	6.7	6.5
Bridgend	Utilities WFJ	0.8	0.8	0.7	0.7	0.8	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5
Bridgend	Construction WFJ	4.7	4.3	4.4	4.7	4.8	5.2	4.8	5.1	5.2	5.2	5.3	5.3	5.4	5.4	5.5	5.6	5.6	5.7	5.7	5.8	5.8	5.9	5.9
Bridgend	Wholesale & Retail WFJ	10.0	10.2	10.1	9.8	10.3	10.2	9.4	9.4	8.9	8.8	8.8	8.8	8.8	8.8	8.8	8.8	8.8	8.8	8.8	8.8	8.8	8.8	8.8
Bridgend	Transport & storage WFJ	2.0	1.9	1.9	2.1	2.1	2.0	1.9	2.2	2.3	2.4	2.4	2.4	2.4	2.4	2.4	2.4	2.4	2.4	2.4	2.5	2.5	2.5	2.5
Bridgend	Accommodation, Food Services & Recreation	4.5	4.9	4.7	4.8	5.0	5.4	5.2	5.1	5.6	5.6	5.6	5.6	5.6	5.6	5.6	5.7	5.7	5.7	5.7	5.7	5.7	5.7	5.7
Bridgend	Information & communication WFJ	1.5	1.6	1.7	2.0	2.1	2.3	2.5	2.5	2.6	2.6	2.7	2.7	2.8	2.8	2.9	3.0	3.0	3.1	3.2	3.3	3.3	3.4	3.5
Bridgend	Finance & Insurance WFJ	0.8	0.8	0.8	0.7	0.7	0.7	0.7	0.7	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8
Bridgend	Professional & Other Private Services WFJ	8.5	8.4	8.8	9.5	9.6	9.5	9.8	10.3	10.3	10.5	10.6	10.6	10.7	10.7	10.8	10.9	10.9	11.0	11.1	11.1	11.2	11.3	11.3
Bridgend	Public Services WFJ	20.2	20.3	20.7	21.0	20.6	20.8	20.6	20.5	20.7	20.9	21.1	21.3	21.5	21.7	21.9	22.1	22.3	22.5	22.7	22.8	22.9	23.1	23.2

BRIDGEND SCENARIO MINUS BASELINE

Local/Combined	Variable Name	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
Bridgend	Labour Force	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	1.0	1.3	1.6	1.9	2.1	2.4	2.7	2.8	3.2	3.5	3.7	4.0	4.2	4.6
Bridgend	Labour Force - 16 to 64	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.9	1.3	1.6	1.9	2.2	2.5	2.8	3.0	3.4	3.6	3.9	4.1	4.5	4.8
Bridgend	Labour Force - 65 Plus	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	-0.1	-0.1	-0.1	-0.2	-0.2	-0.2	-0.3	-0.3
Bridgend	Population - retired	0.1	-0.1	0.0	-0.1	0.0	0.0	0.1	-0.1	-0.1	-0.3	-0.2	-0.3	-0.4	-0.4	-0.5	-0.6	-0.6	-0.6	-0.6	-0.7	-0.8	-0.8	-0.9
Bridgend	Population - student	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.2	0.2	0.4	0.5	0.6	0.7	0.8	0.9	1.1	1.1	1.2	1.3	1.3	1.5	1.6	1.6
Bridgend	Population - 16 Plus	0.2	-0.1	0.0	0.0	0.0	0.0	0.1	0.0	1.6	1.8	2.1	2.5	2.8	3.3	3.7	4.1	4.6	5.1	5.5	6.0	6.4	7.0	7.5
Bridgend	Population - 16 to 64	0.1	0.0	0.0	-0.1	0.0	0.0	0.0	0.0	1.6	1.8	2.3	2.7	3.2	3.7	4.2	4.7	5.1	5.7	6.2	6.7	7.2	7.8	8.3
Bridgend	Population - 65 Plus	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	-0.1	-0.2	-0.3	-0.4	-0.4	-0.5	-0.5	-0.5	-0.6	-0.6	-0.7	-0.8	-0.8	-0.8
Bridgend	Total Population	0.1	0.0	0.0	0.0	0.0	0.0	0.2	0.2	1.7	2.1	2.6	3.1	3.6	4.1	4.7	5.2	5.7	6.3	6.8	7.4	7.9	8.5	9.2
Bridgend	Working Age Population	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.6	2.0	2.3	2.8	3.2	3.7	4.2	4.7	5.2	5.7	6.2	6.8	7.2	7.8	8.4
Bridgend	Economic Activity Rate (%) - 16+	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	-0.1	-0.1	0.0	0.2	0.2	0.2	0.3	0.3	0.2	0.3	0.3	0.3	0.3	0.2	0.3
Bridgend	Economic Activity Rate (%) - 16 to 64	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.4	-0.5	-0.5	-0.5	-0.6	-0.7	-0.7	-0.8	-0.9	-1.0	-1.1	-1.2	-1.3	-1.4	-1.5
Bridgend	Economic Activity Rate (%) - 65 Plus	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	-0.1	-0.1	-0.1	-0.1	-0.2	-0.3	-0.3	-0.4	-0.5
Bridgend	Workforce Jobs	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2	0.4	0.4	0.4	0.5	0.5	0.7	0.7	0.8	0.8	0.9	1.0	1.1	1.1
Bridgend	Jobs Demand	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2	0.4	0.4	0.4	0.5	0.5	0.7	0.7	0.8	0.8	0.9	1.0	1.1	1.1
Bridgend	Excess Jobs	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bridgend	FTE jobs	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.2	0.3	0.3	0.4	0.4	0.4	0.5	0.6	0.6	0.7	0.7	0.7	0.8	0.8
Bridgend	Workplace based employment	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.2	0.2	0.3	0.3	0.4	0.5	0.5	0.5	0.6	0.7	0.7	0.8	0.9
Bridgend	Residence based employment	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.3	0.5	0.4	0.5	0.6	0.7	0.7	0.8	0.9	0.9	1.0	1.1
Bridgend	Net commuting balance (inflow)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	-0.1	-0.2	-0.1	-0.1	-0.1	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2
Bridgend	Unemployment	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	1.0	1.1	1.3	1.4	1.7	1.9	2.1	2.2	2.5	2.6	2.9	3.0	3.2	3.5
Bridgend	Unemployment Rate	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	1.3	1.5	1.8	1.9	2.3	2.6	2.9	2.9	3.3	3.4	3.8	4.0	4.2	4.6
Wales	Workforce Jobs	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
United Kingdom	Workforce Jobs	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bridgend	Agriculture, Forestry & Fishing WFJ	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bridgend	Extraction & Mining WFJ	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bridgend	Manufacturing WFJ	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	0.1	0.1	0.0	0.0
Bridgend	Utilities WFJ	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bridgend	Construction WFJ	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.1	0.0	0.1	0.0	0.1	0.1
Bridgend	Wholesale & Retail WFJ	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.1	0.2
Bridgend	Transport & storage WFJ	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.1
Bridgend	Accommodation, Food Services & Recreation WFJ	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Bridgend	Information & communication WFJ	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.1	0.1	0.1	0.1	0.1	0.1
Bridgend	Finance & Insurance WFJ	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bridgend	Professional & Other Private Services WFJ	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.1
Bridgend	Public Services WFJ	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.2	0.2	0.2	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.5	0.5