UNDERSTANDING SURREY'S GROWTH REQUIREMENTS

THIS SECTION AIMS TO SUMMARISE THE KEY ISSUES IN PLANNING FOR GROWTH IN SURREY TO 2030.

As highlighted in the previous section, growth in Surrey is planned for through the Local Plan process on an authority-by-authority basis. This section seeks to set the context for county-wide growth requirements and current planned growth areas as established within the Local Plans.

It comprises:

POPULATION GROWTH REQUIREMENTS

- Population modelling and growth assumptions to 2030
- A social portrait summarising current socio-demographic issues and trends likely to impact on growth and infrastructure provision.
- An understanding of housing growth requirements and locations

ECONOMIC GROWTH REQUIREMENTS

- An economic portrait summarising current economic issues and trends
- An understanding of employment requirements and locations

RELATIONSHIP WITH LONDON AND ADJOINING AREAS

- An understanding of impacts on Surrey from potential growth in adjoining areas, especially from London

This growth context is then used as the basis for examining infrastructure requirements in the remainder of this study.

POPULATION PROJECTIONS

THERE ARE 2 DIFFERENT POPULATION PROJECTIONS WHICH NEED TO BE TAKEN INTO ACCOUNT:

2012 Based Sub National Population Projections from ONS

- Based on ONS census results, natural change and migration trends. These are unconstrained projections.
- Provided at the local authority level
- Used by Central Government departments and agencies for local authority funding
- Used by DCLG to produce the latest household forecasts which inform Strategic Housing Market Area Assessments (SHMAs)
- The ONS projection assumes a 2015 population of 1,171,200 for Surrey
- It projects a 2030 population of 1,312,600 - an increase of 141,400, equivalent to 12% growth

SCC PopGroup Model based Population forecast

- A bespoke population forecast produced specifically for this study to establish a population forecast directly linked (and constrained) by the planned housing
- Based on ONS census results, natural change but constrained to the housing trajectories of planned growth for each of the local authorities
- Local authority level data provided July 2015
- This projection assumes a 2015 base population of 1,157,170 for Surrey

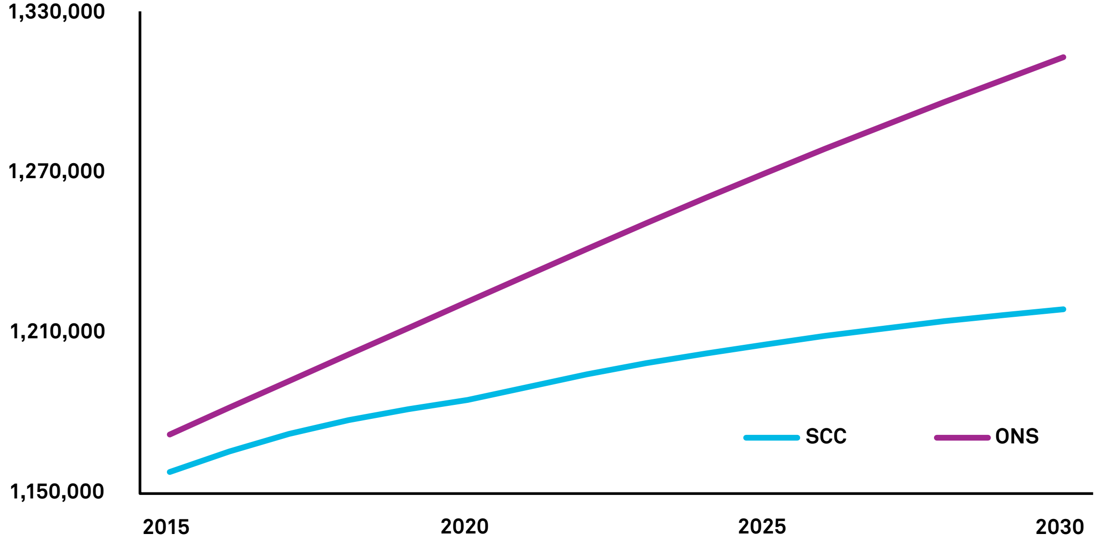


FIGURE 3.1 -2030 POPULATION FORECASTS

Source: SCC PopGroup Model Forecasts, ONS 2012 based Sub National Population Projections

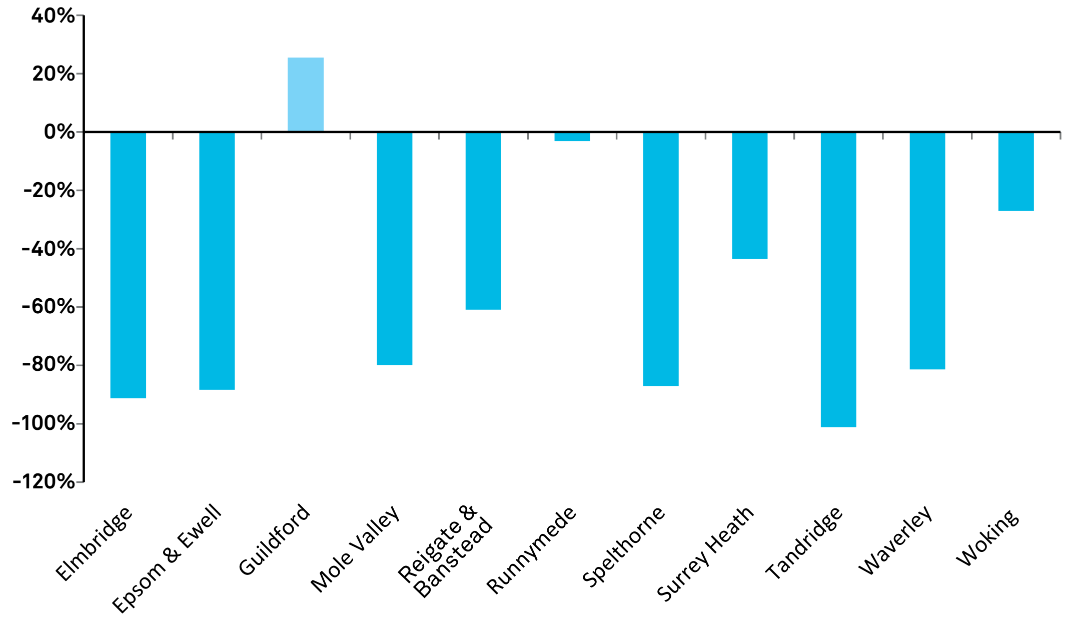


FIGURE 3.2 - SCC FORECASTS VARIATION FROM TREND BASED ONS FORECASTS

- SCC Forecast projects a 2030 population of 1,218,170 - an increase of 61,000, equivalent to 5% growth
- It should be noted that given this data was taken from a snapshot in time, it may differ from any evidence in emerging plans and SHMAs.

HOW THE POPULATION FORECASTS VARY BY LOCAL AUTHORITY

The housing trajectory based SCC forecasts and trend based ONS forecasts portray a significantly different total population change across Surrey as a whole between 2015 and 2030. There are significant variations between the local authorities. As shown in figure 3.2 the population forecasts which have been driven by the current housing trajectories are considerably lower in Tandridge, Elmbridge and Epsom & Ewell than the trend based forecasts.

Only Guildford shows housing based figures that are higher than the trend based forecasts, while Runnymede has the most similar housing forecasts between the two. However, the housing requirement for both these authorities is in whole or part based on an objectively assessed need figure and has yet to be confirmed through the examination process.

It is important to make clear why the population projections produced by SCC using the PopGroup Model are notably lower in most cases than the ONS population forecasts. As set out in the earlier study parameters section, the PopGroup model is constrained by the number of homes planned by the local authorities. All other assumptions on baseline population and natural change will match the ONS forecasts.

Additionally, most of the housing trajectories provided by the local authorities are based upon anticipated delivery of sites and/or annual average plan requirements that, with the exception of Reigate & Banstead and Woking, have not considered objectively assessed needs for housing. The trajectories for Guildford and Runnymede use the minimum recommended figure for objectively assessed need from published draft SHMAs at July 2015.

3.1 SOCIAL PORTRAIT

THE FOLLOWING HEADLINES SUMMARISE KEY SOCIO-DEMOGRAPHIC TRENDS AND PROJECTIONS THAT WILL AFFECT THE DISTRIBUTION OF GROWTH AND PLANNING FOR SUPPORTING INFRASTRUCTURE TO 2030.

Surrey will grow by at least 61,000 people (5% increase) by 2030

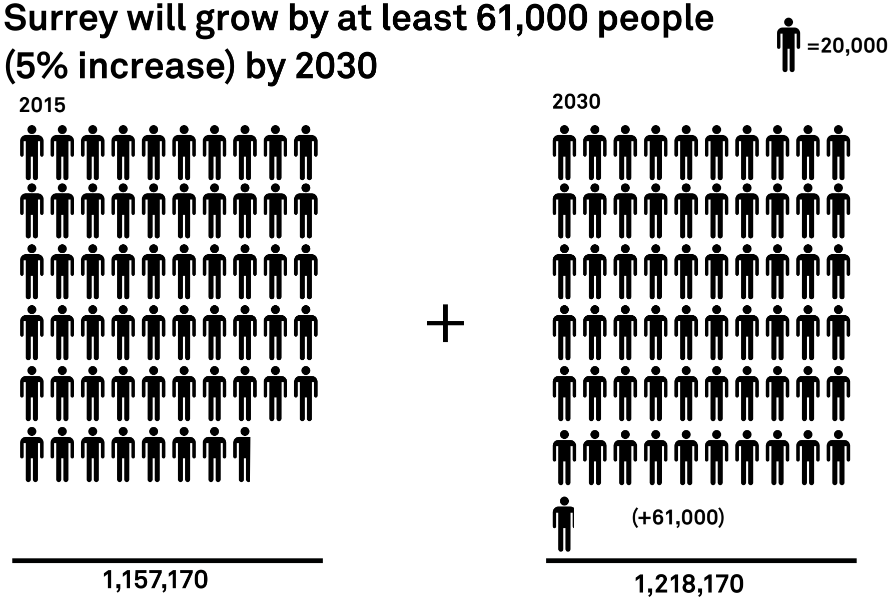


FIGURE 3.3
Source: SCC PopGroup Model

However, this growth varies significantly within Surrey, with the greatest increases currently projected in Guildford, Runnymede and Reigate & Banstead. Tandridge is forecast to see no population increase which is a direct result of the housing trajectory.

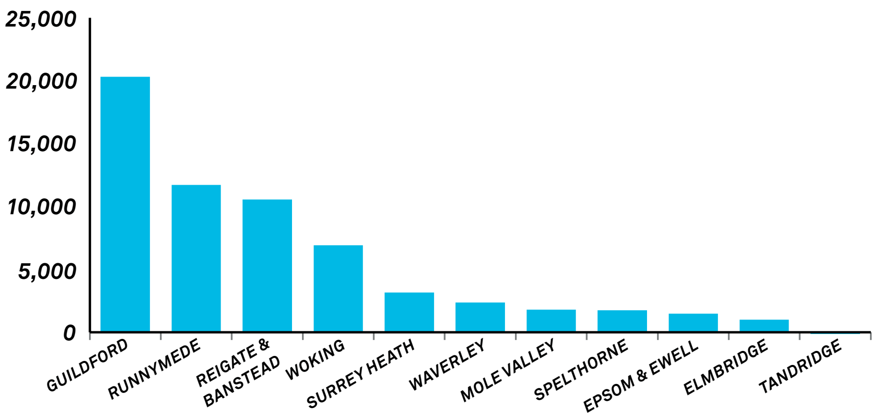


FIGURE 3.4
Source: SCC PopGroup Model

In 2013 the natural increase of Surrey was 3,726 people:

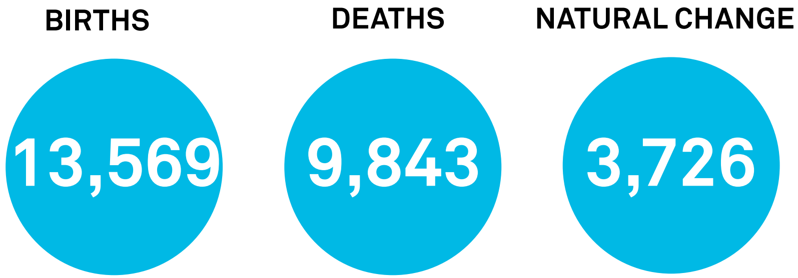


FIGURE 3.5
Source: ONS, 2013

In 2014 there was net international migration of 3,035 people into Surrey

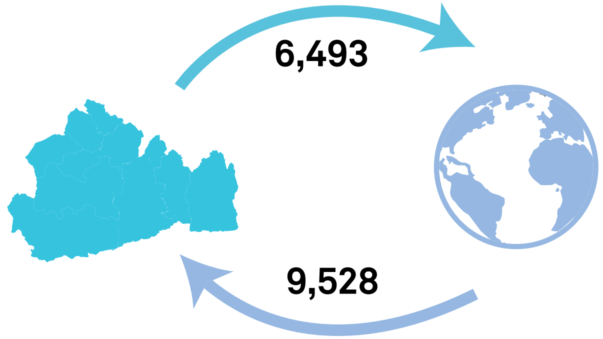


FIGURE 3.6
Source: ONS, 2014

Guildford saw the biggest net-increase in international migration of 1,540 people.

In 2014 there was net domestic migration (within UK) of 2,570 people into Surrey

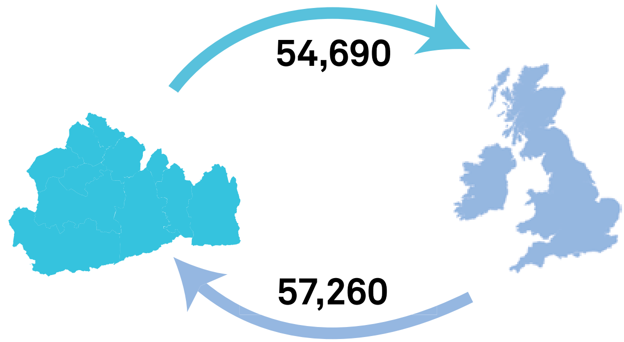


FIGURE 3.7
Source: ONS, 2014

Migration between Surrey and London 2002-2014

London and Surrey are increasingly interconnected - the flow of migrants from London into Surrey is nearly 2:1 from 2002 - 2014, in which Surrey received a net increase of 137,830 people from London.

Elmbridge received 17% of migrants while Reigate & Banstead received 13% and Epsom & Ewell 11%.

FIGURE 3.8 - INTERNAL MIGRATION BETWEEN LONDON AND SURREY LOCAL AUTHORITIES (2002-2014) (ONS)

Source: ONS, 2002-2014

The population is ageing: The greatest increase in age categories will be those over 60, with the biggest increase in 85+

Forecast Change in Age Profile 2011 -2030

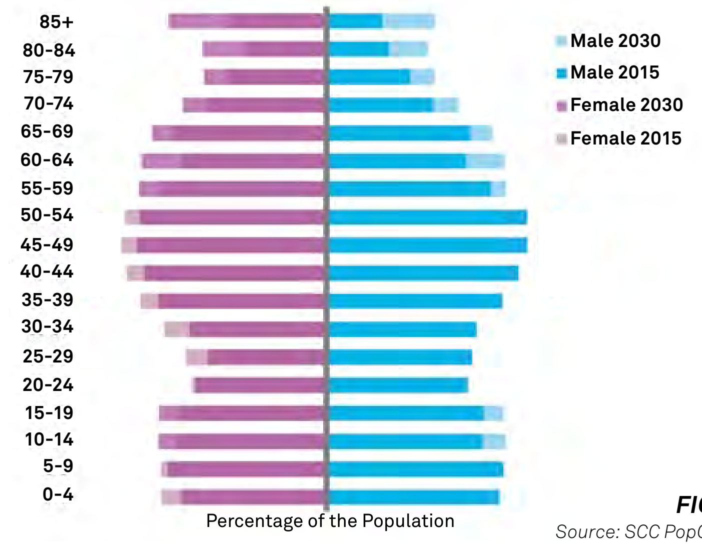


FIGURE 3.9
Source: SCC PopGroup Model

An ageing population will cause significant pressures on certain types of infrastructure demands in Surrey. Changing requirements for housing typologies, to increasing needs for healthcare and accessible infrastructure will almost certainly rise as those over the age of 60 will begin to represent an increasingly significant proportion of Surrey's population.

NEW PERSON BY AGE BRACKET

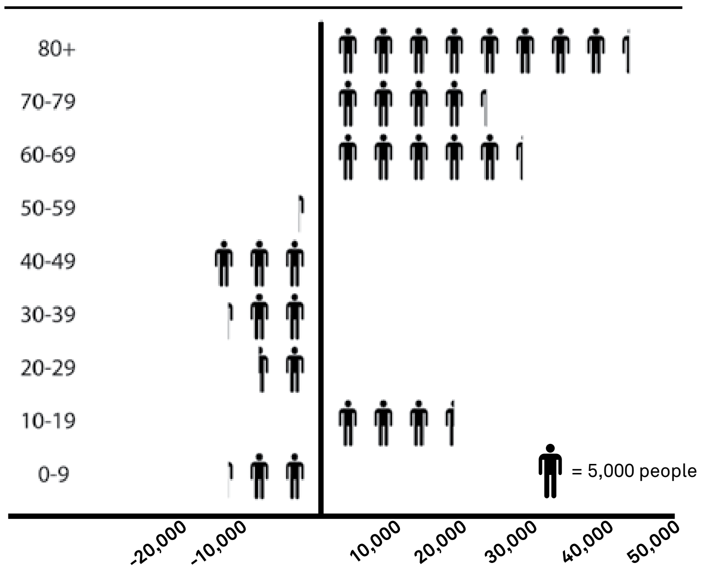


FIGURE 3.10
Source: SCC PopGroup Model

As the population gets older, working age residents will decline by 3% in their total share of the population by 2030, whereas elderly residents will increase their share by 4% of the population

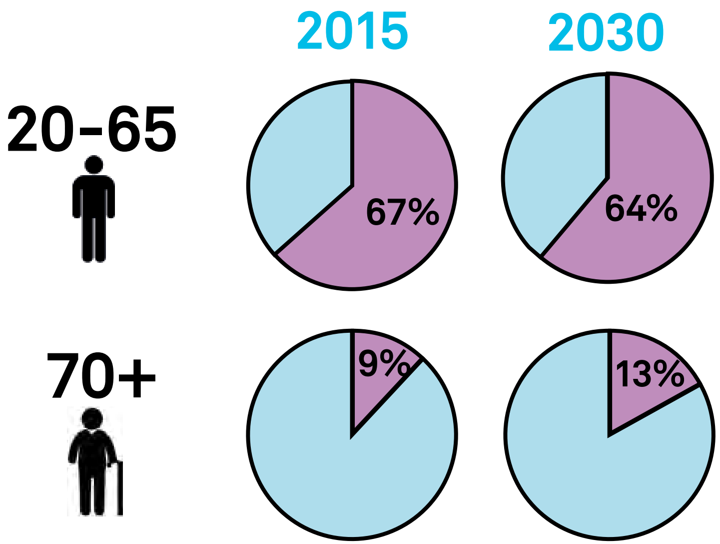


FIGURE 3.11
Source: SCC PopGroup Model

As the elderly population increases this will likely create greater demand for 1 bedroom dwellings, including apartments. Although evidence suggests a large majority of elderly residents prefer not to downsize which also presents challenges as larger family homes are not made available to younger and larger families.

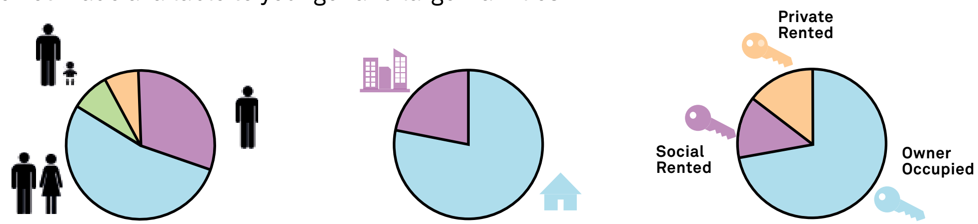


FIGURE 3.12
Source: ONS 2011

The majority of Surrey's current housing stock is well suited for family couples (49%), however as the population ages housing stock requirements will alter.

Over 78% of the current housing stock is single family homes, which are not ideally suited for an ageing population that requires smaller accommodation

The current population in Surrey mostly own their homes (73%), with few renting (14%) or in social housing (11%)

Quality of life is generally high across Surrey

However, there are some pockets of deprivation in certain urban areas such as north Tandridge, areas around Spelthorne and Elmbridge, parts of Guildford, and one small area of high deprivation in Woking.

This typically high quality of life is reflected by the fact that only 0.8% of Surrey's working age population are claiming Job Seekers Allowance (JSA). Furthermore, an analysis of the number of JSA claimants from June 2014 to June 2015 shows a significant drop of 30%, suggesting an improving economic position in Surrey.

Guildford (12%) and Reigate & Banstead (15%) experience the highest level of JSA claimant rates across Surrey, reflecting the disparities in wealth commonly representative of major urban centres.

WORKING AGE JOB SEEKERS ALLOWANCE CLAIMANTS 2014-15

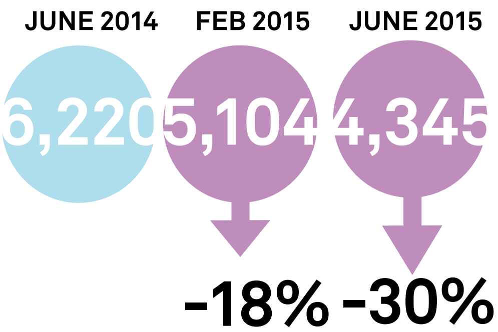


FIGURE 3.13
Source: NOMIS 2015

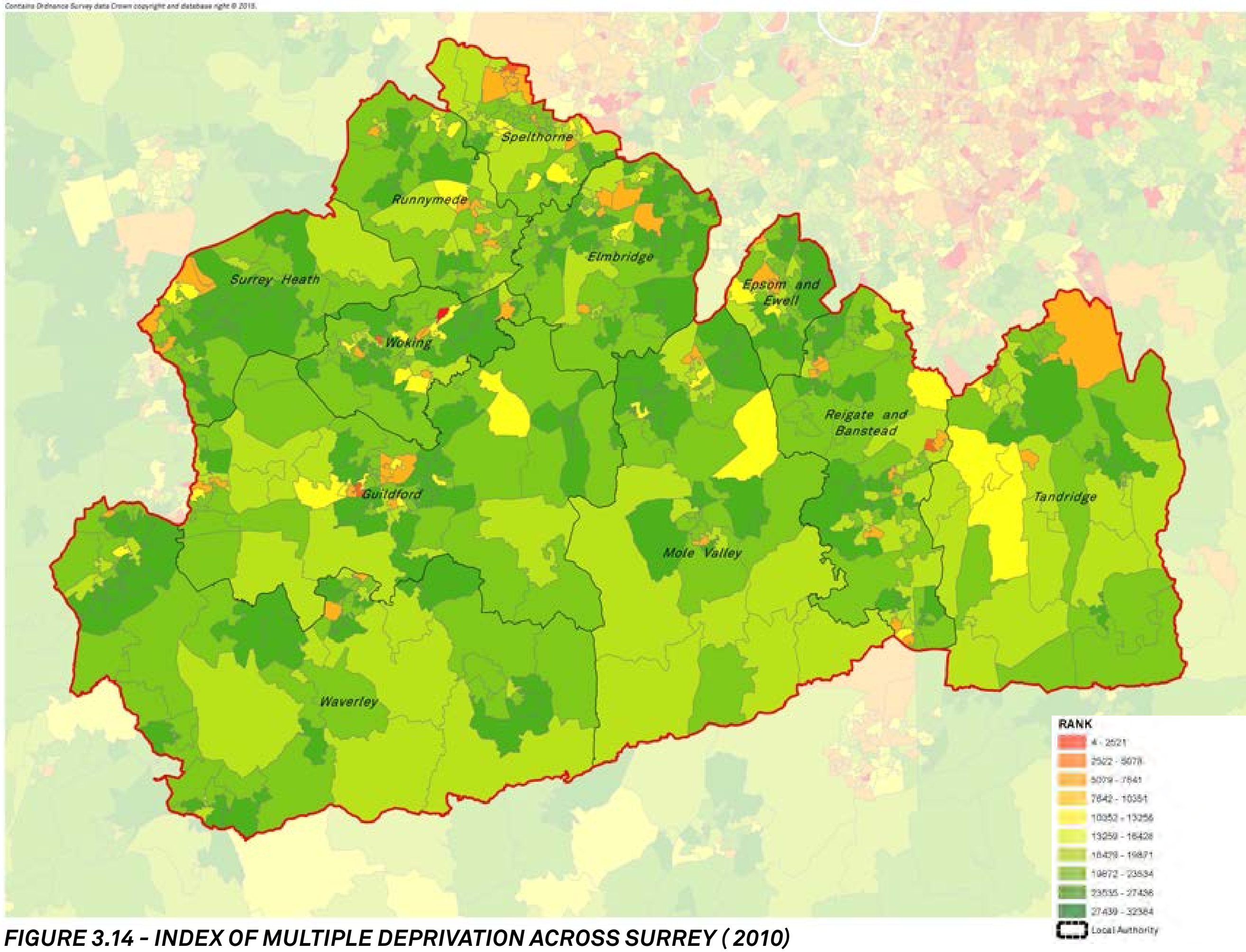


FIGURE 3.14 - INDEX OF MULTIPLE DEPRIVATION ACROSS SURREY (2010)
Source: DCLG

3.2 HOUSING A GROWING POPULATION

EXISTING HOUSING

There are approximately 483,000 housing units existing across Surrey local authorities. Figure 3.15 illustrates the distribution of those existing homes across the county with the largest share of homes accommodated by Reigate and Banstead, Guildford, Elmbridge and Waverley and the least homes within Epsom and Ewell.

The same figure illustrates the forecast additional dwellings between 2015 and 2030 as informed by the eleven local authorities for the purposes of this study (these are not all derived on the same basis as set out under the study parameters in Section 1 and the data caveats in Section 8). Figure 3.15 shows both the spread of that additional housing across the county as a whole but also the relative increase within each of the local authorities.

The local authority housing trajectories indicated that some 47,000 housing units are planned across Surrey between 2015 and 2030. This would equate to an annual completion rate of 3,137 dwellings which is considerably higher than the average achieved between 2010 and 2014 for Surrey as a whole which was closer to 2,500 dwellings per annum on average. Figure 3.16 illustrates the total completions achieved for each local authority between 2010 and 2014 according to DCLG data.

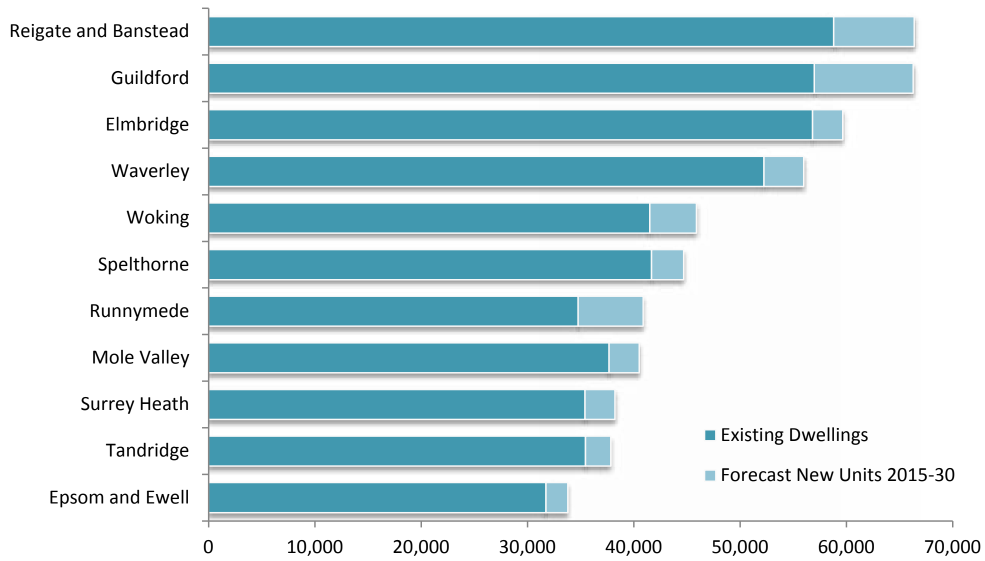


FIGURE 3.15 - EXISTING AND PROPOSED HOUSING

Source: ONS 2011, Local Authority data provided to Surrey County Council for Infrastructure Study

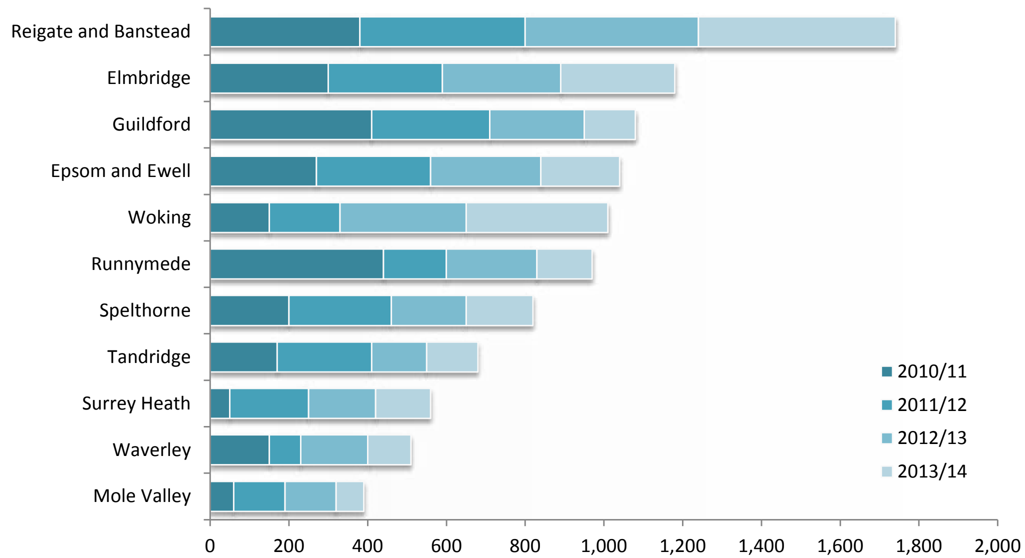


FIGURE 3.16 - RECENT HOUSING COMPLETIONS 2010/11 - 2013/14

Source: DCLG Completions Data

IDENTIFIED HOUSING SITES

For the purpose of this study the eleven local authorities were asked to provide two information sets.

The first was an agreed macro target housing trajectory for the local authority as a whole between 2015 and 2030. This was required to establish the total scale of housing growth expected over the study period and allow a bespoke population forecast to be produced to inform the assessment. The total number of homes forecast for each local authority is presented in figure 3.18.

The second set of information requested was detailed site specific data setting out the currently identified potential housing sites from all sources (permissions, allocations, strategic sites etc.) Where possible the associated phasing of these sites was also requested. This data has been used to map the distribution of forecast growth as illustrated in figure 3.19 over the page.

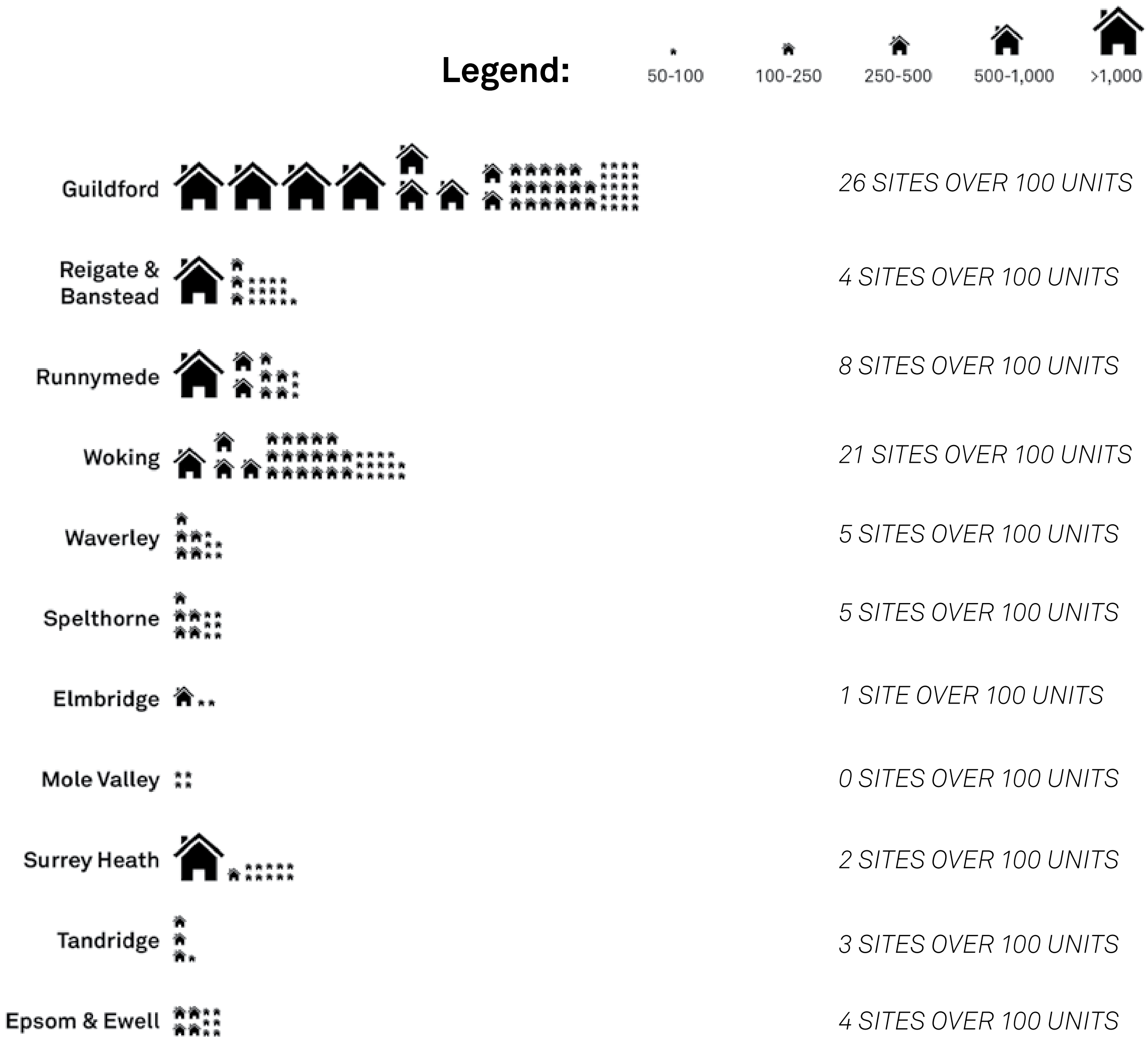


FIGURE 3.17 - NUMBER OF POTENTIAL SITES CURRENTLY IDENTIFIED FOR EACH AUTHORITY

Source: Local Authority data provided for Infrastructure Study

PHASING

Figure 3.18 demonstrates current anticipated phasing of housing in the period to 2030.

The phasing has been recorded alongside the trajectories at a site specific level allowing the growth in housing to be illustrated using GIS, as well as phased over time. The phasing is broken down into the following periods:

- 2015-2020;
- 2020-2025;
- 2025-2030.

The housing trajectories show the following:

- The greatest proportion of houses will come forward between 2015-2020, in which 17,000 units are proposed. This accounts for 36% of the housing across Surrey;
- Housing trajectories are lower in the long term as fewer sites have been identified for development

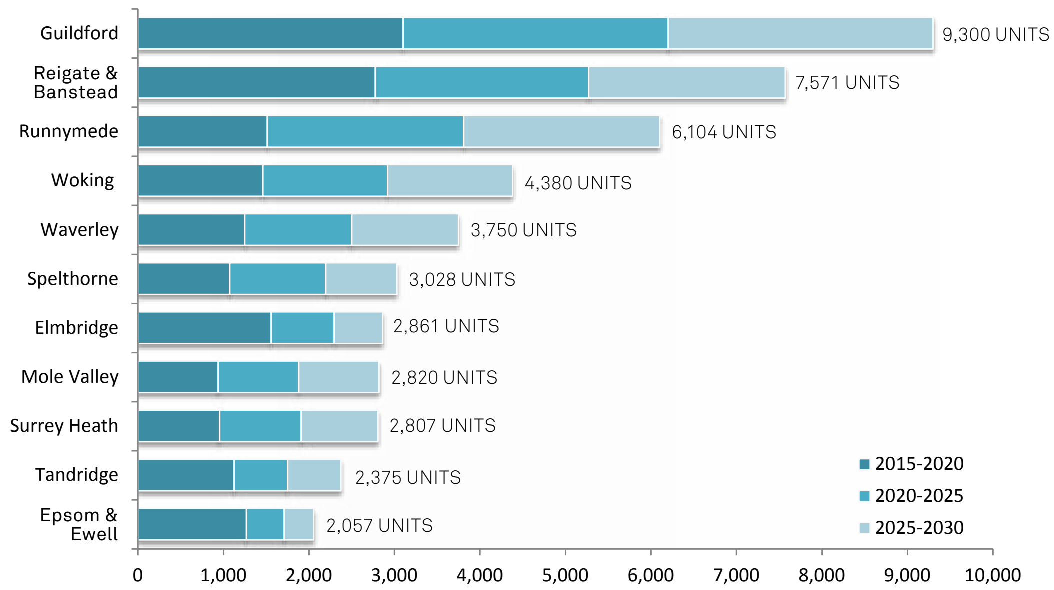


FIGURE 3.18 - PROPOSED HOUSING TRAJECTORIES PHASED OVER 15 YEARS

Source: Local Authority data provided for Infrastructure Study

Technical Note on Housing Trajectories:

As stated in the Study Parameters in Section 1 of this report the housing trajectories presented in this document have been provided by the LPAs but represent only the working assumption on likely housing delivery at July 2015 and do not necessarily represent the latest local plan position.

Importantly, analysis of the latest ONS population forecasts and associated DCLG household forecasts for Surrey suggest the housing figures presented for some of the local authorities within this section could underestimate future housing growth to a significant degree. The exact extent of this underestimation is hard to quantify however due to the number of variables of objectively assessed housing need but it is considered reasonable to assume **the forecasts in this study represent a minimum scenario of housing growth**.

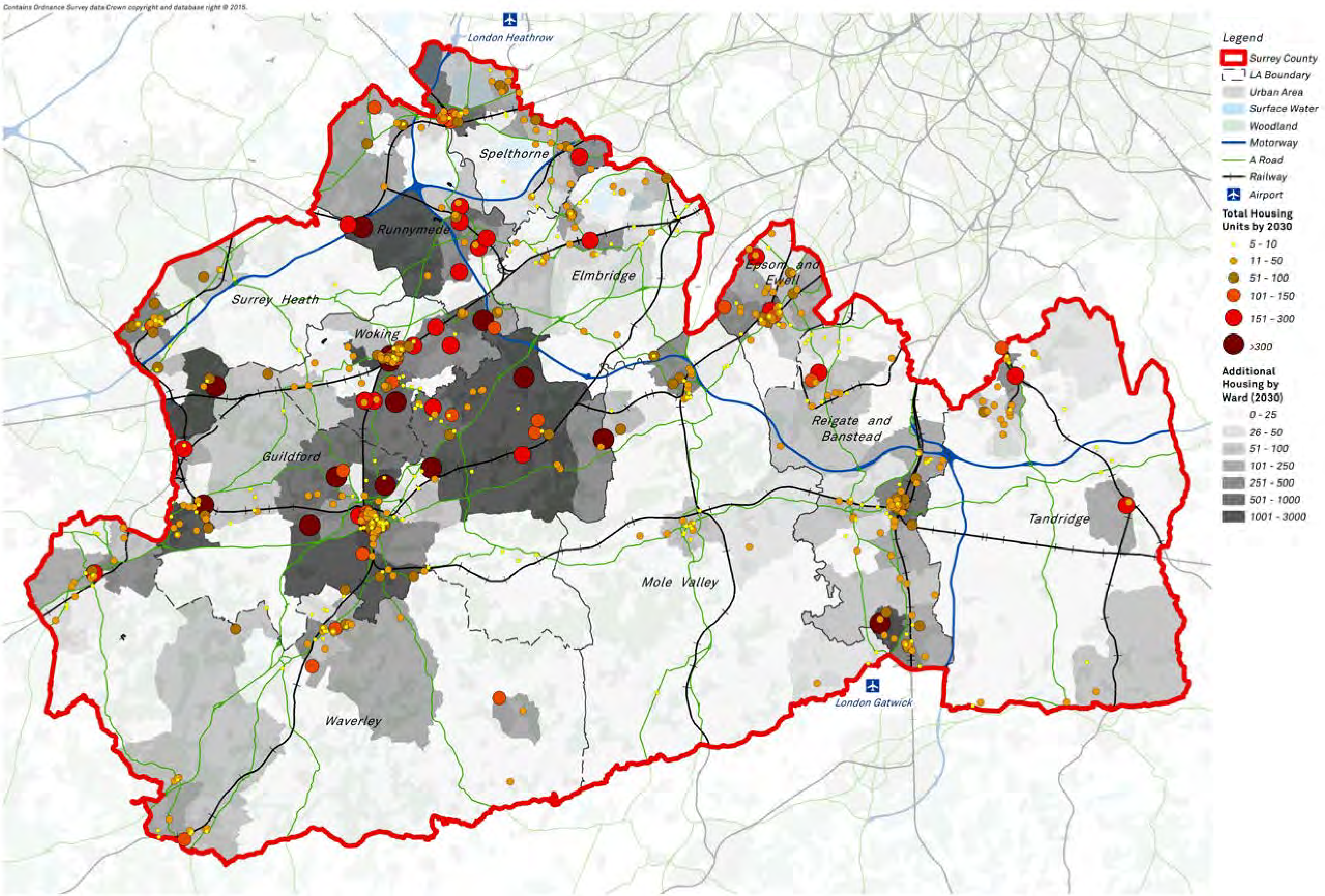


FIGURE 3.19 - MAJOR HOUSING SITES AND GROWTH BY WARD IN SURREY TO 2030

* This is based on the most up to date information at the time of publication and could be subject to change, subject to review of planning policy documents

Source: Local Authority data provided for Infrastructure Study

3.3 ECONOMIC PORTRAIT

SURREY'S ECONOMIC GROWTH IS DEPENDENT UPON ONGOING INVESTMENT IN INFRASTRUCTURE TO SUPPORT ECONOMIC ACTIVITIES, AND A WELL SERVICED HOUSING STOCK TO ENSURE A GROWING WORKFORCE CAN BE ACCOMMODATED. THIS SECTION SEEKS TO SET OUT THE CURRENT AND FUTURE ECONOMIC CONTEXT FOR SURREY AND LIKELY IMPLICATIONS FOR INFRASTRUCTURE.

ECONOMIC CONTEXT

Economic growth in Surrey varies across local authorities, with some areas performing well in many sectors, and others facing economic challenges.

On average, Surrey has seen strong economic growth. It is in close proximity to London as well as key infrastructure including Gatwick and Heathrow airports that connect it with the UK, Europe and the rest of the world. It has strong road and rail infrastructure providing primary connections to London and the rest of the UK (see Figure 3.20).

Surrey is located within the boundaries of 2 Local Enterprise Partnerships (LEPs) - Enterprise M3 (EM3) LEP and Coast to Capital (C2C) LEP.

Enterprise M3, which has been ranked the most resilient LEP area in England, currently has the second largest local business base, third highest skills and labour market, while ranking first in community cohesion. It covers mid and north Hampshire and west Surrey. It covers 14 district authorities across the two counties.

Currently, within the Enterprise M3 LEP there are 86,000 businesses that support 740,000 jobs. The LEP has a total GVA of £35bn. Future investments will focus on knowledge-intensive services that produce high value added in computing, defence, cyber security, digital media and professional services.

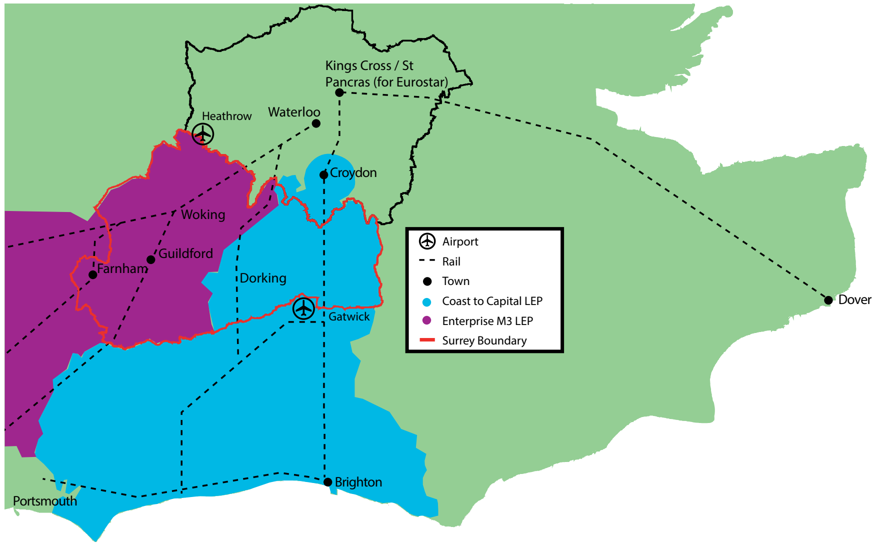


FIGURE 3.20 - REGIONAL ECONOMIC CONNECTIONS

Enterprise M3 aims by 2020 to have an increase of 25,000 jobs, improved GVA per head from 8% to 10% and to grow the overall business base by 1,400 businesses per annum.

The Coast to Capital LEP, covers all of West Sussex, Brighton and Hove, parts of East Sussex, parts of Surrey and extends up to Croydon in South London. The LEP's investment has a strong transport theme which accounts for the largest single part of its spending, with continued growth around Gatwick a priority as it will improve UK and international connections within the C2C area.

Currently, the entire Gatwick Diamond area creates 50% of the region's Gross Value Added, increasingly becoming the economic hub of the local area. The Gatwick Diamond Initiative is a business-led partnership, funded by seven local authorities (Epsom & Ewell, Reigate & Banstead, and Crawley Borough Councils, Mole Valley, Horsham Mid Sussex and Tandridge District Councils), two County Councils (Surrey & West Sussex) and Gatwick Airport, aiming to grow the region's existing jobs base, attract new jobs and secure investments from companies that most closely match local industry strengths and the predominant sectors that drive the local economy.

Coast to Capital LEP increasingly sees future growth focused on service industries, where 80% of the area's economy is focused. To meet its targets the LEP is focusing on key sectors to improve the digital economy, enhance the environmental resilience to open up new land for development and enhance educational facilities and research centres.

A summary of economic headlines is shown overleaf whilst the county's distribution of employment density is illustrated by Figure 3.21 on the adjoining page.

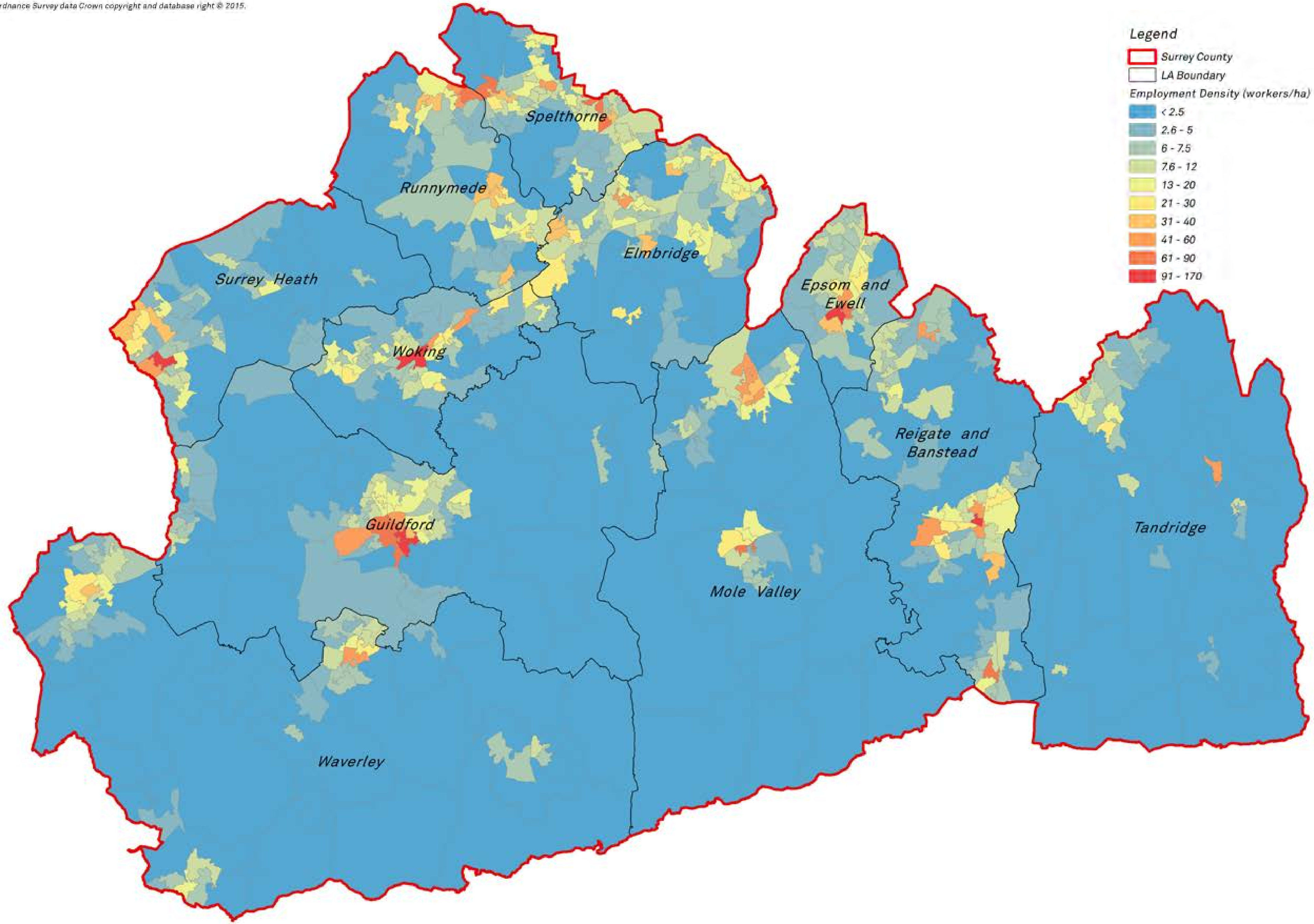
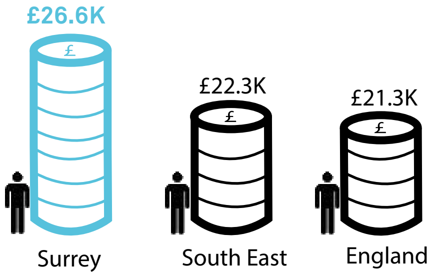


FIGURE 3.21 - EMPLOYMENT DENSITY

Source: ONS 2011

Gross Value Added (GVA) per head

is high on average in Surrey



Source: GVA at 2011 (ONS)

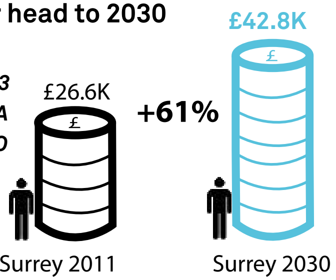
FIGURE 3.22 - GVA PER HEAD

Surrey's GVA per head growth from 1997-2011 has outpaced the areas around the county

Source: GVA at 2011 (ONS)

This rate of growth will slow down to 2030, however Surrey can still expect a significant increase in its GVA per head to 2030

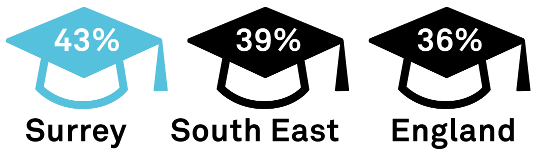
FIGURE 3.23 - TOTAL GVA GROWTH TO 2030



Source:Forecasts and future scenarios for the economy of Surrey: an update to the work done in 2010, 2013, SQW

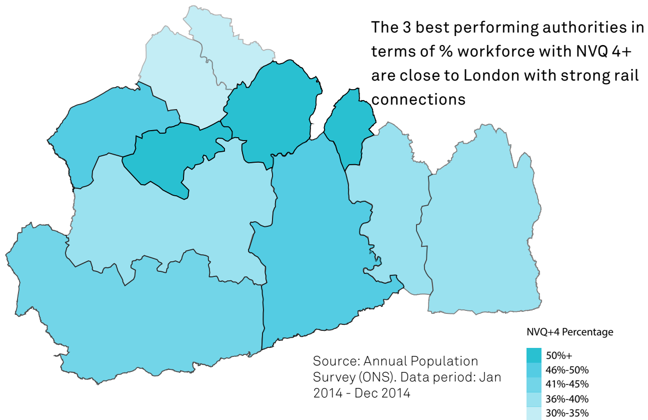
What does this mean?
Surrey does comparatively very well in it's GVA per head, however continued economic investment in infrastructure to enhance the competitive advantage of its proximity to Gatwick, Heathrow and London is necessary.

There is a strong workforce skills profile on average



Source: Annual Population Survey (ONS). Data period: Jan 2014 - Dec 2014

FIGURE 3.24 - % WORKFORCE WITH NVQ4+



Source: Annual Population Survey (ONS). Data period: Jan 2014 - Dec 2014

FIGURE 3.25 - % WORKFORCE WITH NVQ4+

However,

highly skilled occupations

make up 53% of occupations in 2014

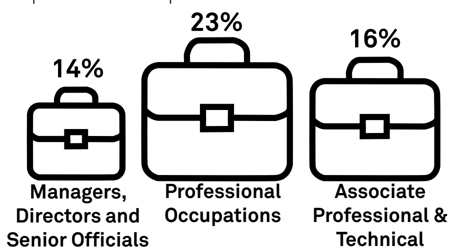


FIGURE 3.26 - OCCUPATIONAL TYPE 2014

Source: ONS

What does this mean?
Overall, Surrey has a highly skilled and diverse occupational base meaning disposable income and in turn quality of life is generally high. However, there are areas of Surrey which lag behind the rest of the county in this respect. Although quality of life is still by no means poor, there is a need to continually invest in these areas, such as Spelthorne, to restrict any further decline and promote growth, while continuing to take advantage of Surrey's strong strategic location relative to London.

Median Salary levels

are significantly higher in Surrey than the English average and the South East

FIGURE 3.27 - SURREY EARNINGS (2014)

Source: ONS

This highlights Surrey as a

net exporter of labour

which can impact negatively on GVA figures

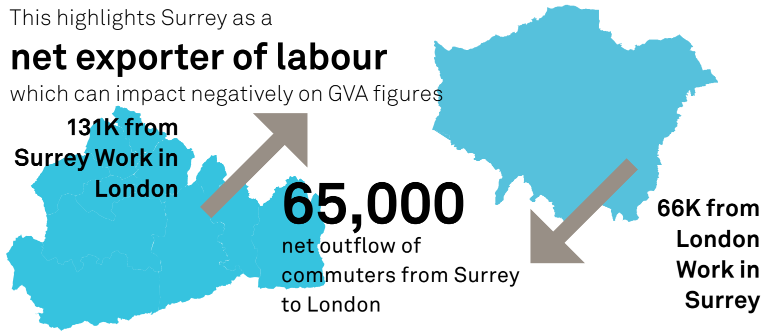
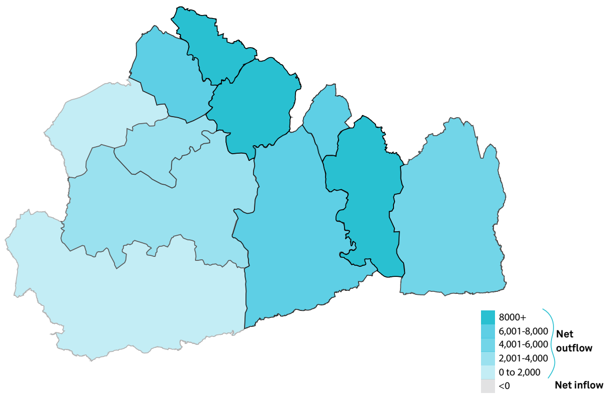


FIGURE 3.28 - EXISTING COMMUTER PATTERNS

Source: ONS



Spelthorne, Reigate & Banstead, and Elmbridge had over 8,000+ net commuting to London

All Local Authorities see an outflow of commuters to London

FIGURE 3.29 - NET COMMUTING IN 2014

Source: ONS

What does this mean?
More investment is also needed in transport infrastructure in the areas of high outflow commuting.

Job growth forecast to 2030

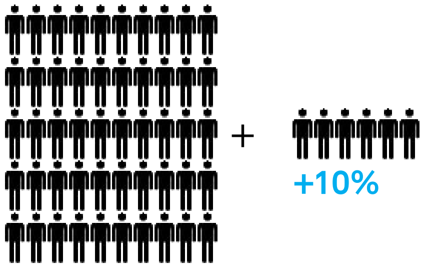


FIGURE 3.30 - JOB GROWTH FORECAST TO 2030
Source:Forecasts and future scenarios for the economy of Surrey: an update to the work done in 2010, 2013, SQW

59,000
new jobs in Surrey to 2030

By 2030 Surrey will have experienced an increase of 59,000 new jobs, the equivalent of a 10% increase over the time period

Employment Growth in the following sub-sectors:

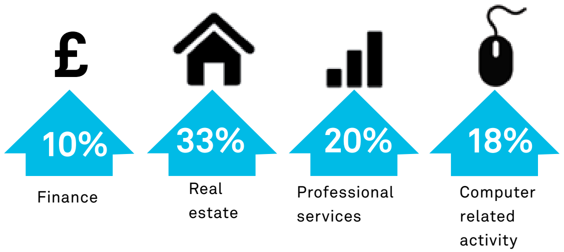


FIGURE 3.31 - SUB-SECTOR GROWTH TO 2030
Source:Forecasts and future scenarios for the economy of Surrey: an update to the work done in 2010, 2013, SQW

What does this mean?
Infrastructure investment is required to support job growth in areas where economic performance is comparatively weaker and address imbalances across the county.

The largest concentration of jobs is in wholesale, retail & public services

in line with the rest of the country

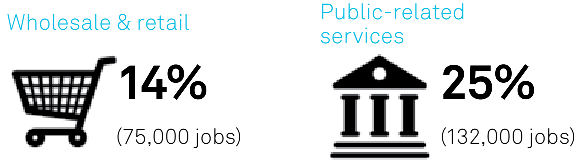


FIGURE 3.32 - LARGEST EMPLOYMENT SECTORS IN SURREY
Source: - BRES (2013)

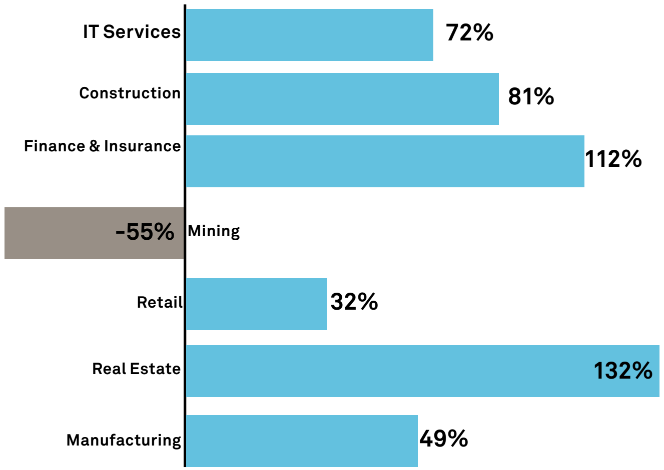


FIGURE 3.33 - SECTOR CHANGE TO 2030
Source:Forecasts and future scenarios for the economy of Surrey: an update to the work done in 2010, 2013, SQW

On average, Surrey has a strong representation in the knowledge economy

FIGURE 3.34 - % OF EMPLOYEES IN THE KNOWLEDGE ECONOMY
Source: - BRES (2013)

However, growth has slowed down in these sectors recently

FIGURE 3.35 - GROWTH IN KNOWLEDGE ECONOMY EMPLOYEES (2009-12)
Source: - BRES (2013)

The knowledge economy is strongest in Mole Valley, Reigate & Banstead, Elmbridge, Runnymede, Waverley and Woking where higher value jobs are located:

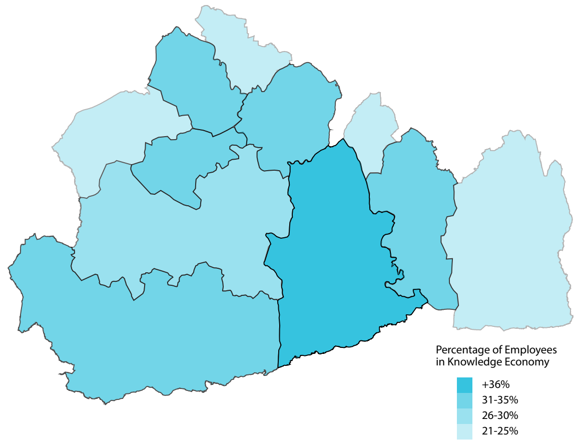


FIGURE 3.36 - PERCENTAGE OF EMPLOYEES IN KNOWLEDGE ECONOMY 2013
Source: - BRES (2013)

What does this mean?
Infrastructure investment is required to support growth in the knowledge economy. This should include attention to softer skills infrastructure provision.

3.4 SITES TO SUPPORT ECONOMIC GROWTH

In order to ensure ongoing economic growth, a number of key employment sites exist across the Surrey Local Authorities.

Planning permissions, adopted and draft Local Plan employment allocations and existing employment sites with identified capacity have been recorded and those sites with over 500 sq.m of additional floorspace have been noted in Table 3.1 and illustrated in Figure 3.37.

The data presented here does not represent the net position on employment space (including the loss of employment space over the plan periods as well) but instead highlights significant new sites and capacity.

As illustrated, Surrey will continue to provide a wide range and quantum of commercial accommodation over the coming years and these employment sites will create additional requirements on the local and strategic infrastructure network, in particular the transport network and utility services.

It should be noted that Surrey accommodates a significant number of smaller businesses and employment sites below the 500 sq.m threshold included here.

	BUSINESS	INDUSTRIAL	MIXED USE	RETAIL	OTHER	N.A	TOTAL
Elmbridge	5	4	0	0	0	0	9
Epsom & Ewell	2	1	1	0	0	4	8
Guildford	23	13	2	10	0	1	49
Mole Valley	3	6	0	2	0	0	11
Reigate & Banstead	3	6	0	3	0	0	12
Runnymede	16	3	0	0	0	0	19
Spelthorne	2	1	2	0	2	0	7
Surrey Heath	0	1	0	0	3	0	4
Tandridge	0	3	0	0	0	0	3
Waverley	7	4	0	0	0	0	11
Woking	6	3	12	0	1	0	12
SURREY	***67***	***45***	***17***	***15***	***6***	***5***	***155***

TABLE 3.1 - KEY EMPLOYMENT SITES IDENTIFIED OVER 500 SQ.M - PERMISSIONS, ALLOCATIONS AND EXISTING SITES WITH CAPACITY (N.A = FUTURE USE UNCONFIRMED i.e. use has not been detailed in local plan)

Source: Local Authority data provided for Infrastructure Study

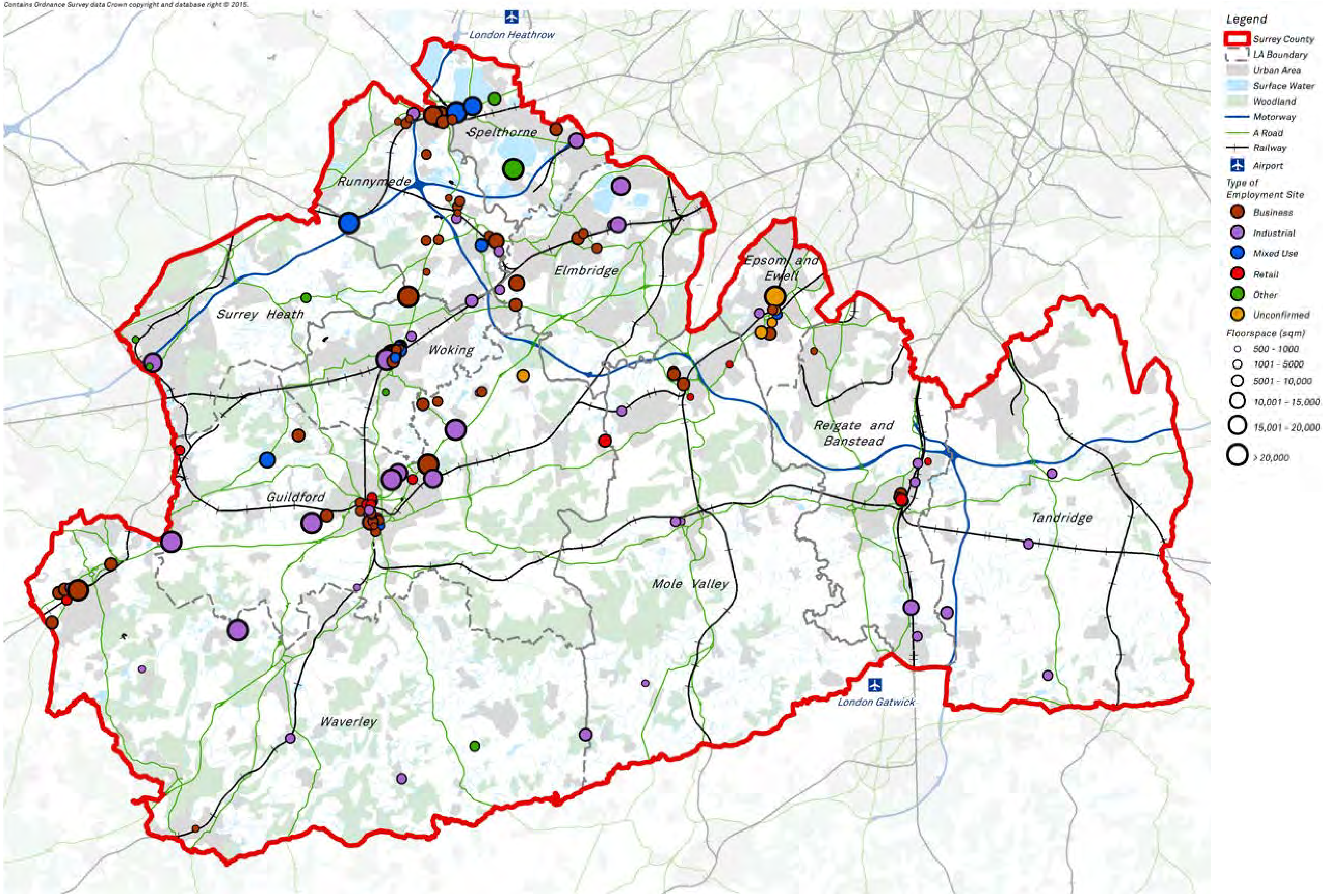


FIGURE 3.37 - SURREY EMPLOYMENT PERMISSIONS, ALLOCATION AND CAPACITY OVER 500 SQ.M

* This is based on the most up to date information at the time of publication and could be subject to change, subject to review of planning policy documents

Source: Local Authority data provided for Infrastructure Study

3.5 WIDER GROWTH

Having presented the forecast housing and economic growth across Surrey to 2030 it is also important to consider the planned growth in Greater London and the counties surrounding Surrey.

Figure 3.38 on the facing page illustrates the extent of planned housing across all local authorities which adjoin the boundaries of Surrey County Council between 2015 and 2030.

Figure 3.38 also illustrates a number of key strategic development sites which are proposed in neighbouring authorities and are considered likely to impact on the strategic infrastructure that also serves Surrey in particular transport, education and healthcare. These include but are not limited to:

- Arborfield Garrison, Wokingham.
- Aldershot Urban Extension, Rushmoor.
- Whitehill Bordon, East Hampshire.
- Warfield, Bracknell Forest.
- Northern Horsham, Horsham.
- Heathrow opportunity Area, Hillingdon.
- Croydon Opportunity Area, Croydon
- Bromley Town Opportunity Area, Bromley
- Kingston Town Centre Opportunity Area, Kingston

As can be seen by the illustration of planned growth the greatest pressures of additional growth are likely along the northern and western boundaries of Surrey with a number of large strategic sites to the west of the county and the high level of planned housing delivery across the London boroughs.

ACCOMMODATING LONDON'S HOUSING DEMAND

The GLA's Further Alterations to the London Plan (FALP) sets out the average annual minimum housing supply targets for each London borough until 2025. This identifies a minimum housing supply target across all boroughs of 42,000 homes.

These targets are informed by the need for housing as evidenced by the GLA's 2013 SHMA and London's housing land capacity as identified through its 2013 SHLAA. The FALP acknowledges that even against its own evidence base the alterations are planning for at least 7,000 shortfall each year over the plan period.

In terms of past housing delivery across London, over the 10 year period between 2004 and 2014, a total of 200,940 homes were completed across London. This equates to 20,094 homes per annum. This is under half the 42,000 housing target set out in the FALP for the next 10 years, creating a significant shortfall of homes per annum unless delivery is improved significantly.

The report 'London's Unmet Housing Needs' (April 2014) authored by NLP has undertaken a high level assessment of the potential impacts of London forecast demand for housing in relation to the planned housing supply set out within the FALP.

This report identifies that whilst London itself may act with a degree of self containment as a housing market area, it is also clear that it exerts significant housing market pressures across a much wider area. This was recognised by SERPLAN which identified this area as the Rest of the South East (ROSE) area, but which NLP define as London's 'wider HMA' reflecting the fact that London's influence is wider than its administrative boundaries.

London's wider HMA effectively represents the area which London's unmet housing needs will have an influence upon and, therefore, encompasses the areas which will likely need to respond to London's unmet needs within their own Local Plans.

NLP looked at two factors: the migration flows from London to that local authority; and the commuting flow from that local authority to London. These were then converted into a simple percentage representing the extent of housing market linkage an area has with London, and therefore a theoretical proportional share of London's unmet housing demand.

This assessment by NLP suggests that If London fails to meet its housing need between 2015 and 2030 there is every indication that unmet needs in London will necessitate additional delivery of new homes in areas around London including Surrey. The assessment suggests a theoretical demand for housing across Surrey of up to 47,800 homes between 2015 and 2030 in addition to those already planned within the Local authority local plans. The greatest additional pressures are identified for Elmbridge, Epsom and Ewell, Reigate and Banstead and Spelthorne.

It is important to note this is purely a theoretical exercise and has not taken into account the limitations to development from the Green Belt and other constraints. It does however demonstrate the scale of potential impact the London housing demand can have upon Surrey into the future and with it the associated pressures on existing and planned infrastructure capacity.

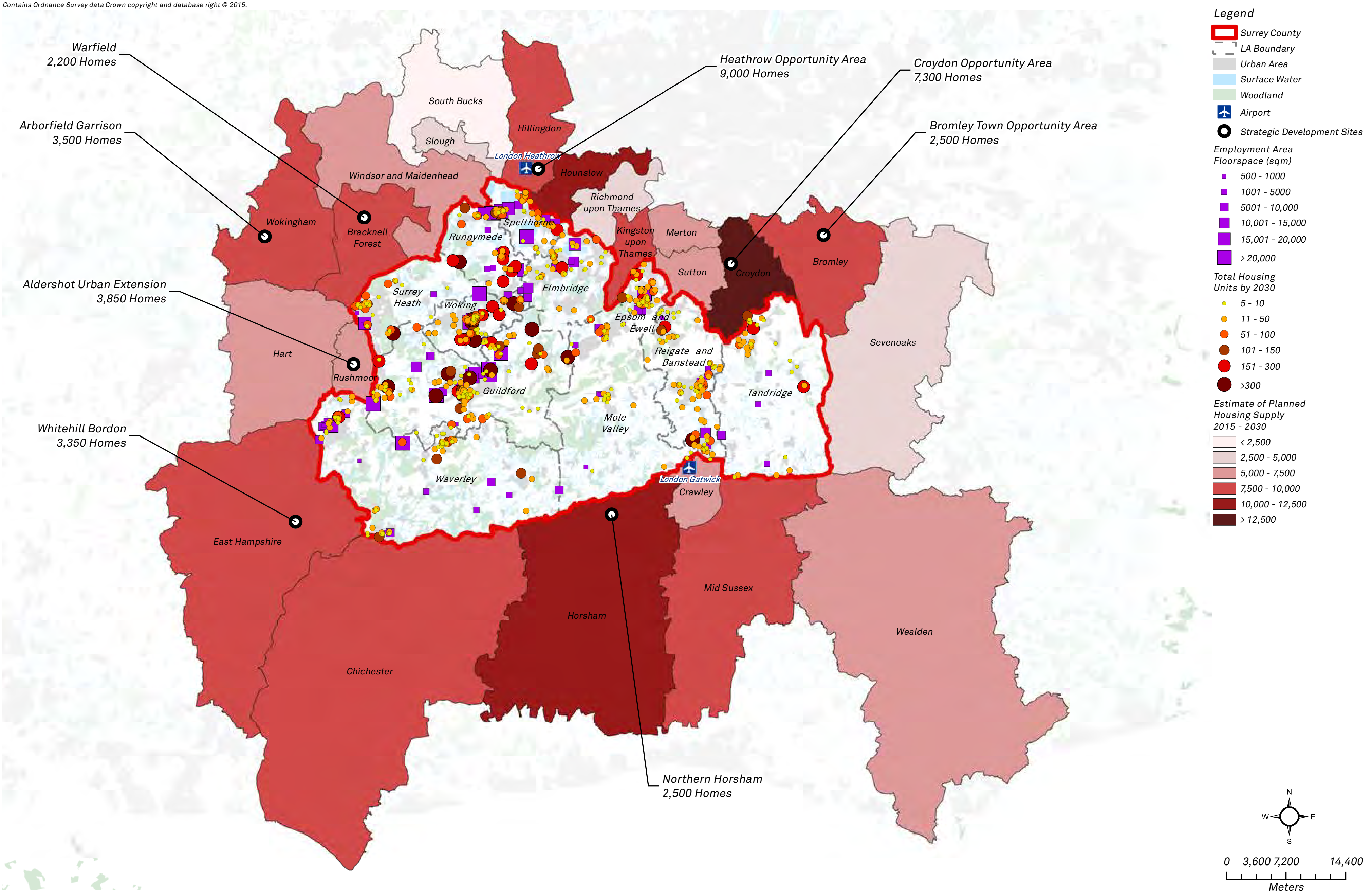


FIGURE 3.38 - ESTIMATED HOUSING FORECASTS AND KEY STRATEGIC SITES FOR LOCAL AUTHORITIES SURROUNDING SURREY COUNTY

Source: Published Local Plan documents and Further Alterations to the London Plan