



Sustaining Growth Through Partnership

2013 – 2016

For the Coastal West Sussex Partnership Board



Coastal West Sussex
Sustaining Growth Through Partnership

Sustaining Growth Through Partnership - An Economic Profile and Priorities for Action

2013 – 2016

Prepared for:

Coastal West Sussex Partnership Board

By:

Bruce Nairne

Scott Marshall

nairne

this is regeneration ltd



Foreword

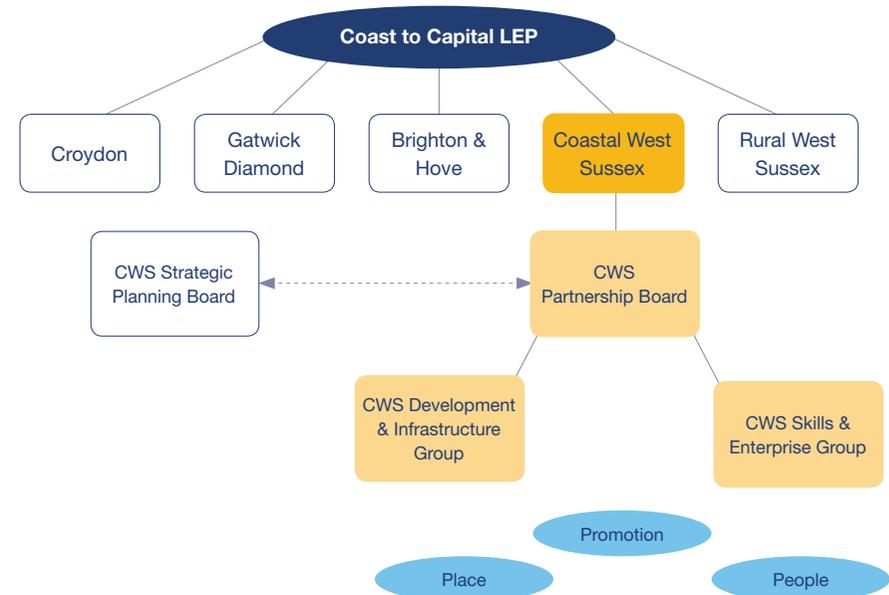
Coastal West Sussex is one of the most popular places in England to live in and visit, but few people are aware of our great businesses and the excellent development opportunities we have.

The success of local economies increasingly rests on their attractiveness and connectivity. People want to live and work in places that have excellent education facilities; a good quality natural environment; a strong cultural heritage; and a diverse and high quality recreation and leisure offer. But they also need good access to markets and suppliers; the right business premises; good ICT infrastructure; a good supply of motivated and skilled labour; and strong business support services and networks.

Coastal West Sussex has many of these things in abundance, but not enough people know about them. We have some of the UK's leading businesses, particularly in the Advanced Engineering and Horticulture sectors, plus one of its most successful commercial ports. We have Further Education colleges and a university that pro-actively engage with local businesses to support their skill

development and recruitment needs. We have beaches, castles; parks, marinas and the South Downs National Park stretches along the north of the Coastal West Sussex area. We have some of the south east of England's most significant development sites and at our eastern and western edges are two of the region's most vibrant cultural centres, Chichester and Brighton.

Yes, we have challenges – all areas do. The 2008/09 banking crisis has forced as all to reflect on our own strengths and weaknesses; to work out how best to support our private sector to provide the high quality jobs that we need; to make sure that we spend our limited public money wisely; and to find new ways of working together to achieve the changes that we want.



Executive Summary

The Coastal West Sussex Partnership Board has a key role in driving and supporting sustainable economic growth.

Sustaining Growth Through Partnership report provides an economic profile of Coastal West Sussex, drawing on data and research evidence, plans and strategies from its constituent local authorities. It has been developed to support the Coastal West Sussex Partnership to develop a clear set of priorities and actions that reflects local economic needs, adds value to existing activities, and supports the priorities set out in the West Sussex Economic Strategy (2012-2020). It reflects the organisational and economic context for supporting sustainable economic growth that has changed considerably since the 2008/09 banking crisis and the election of a new coalition Government in Westminster in 2010.

The spatial area approach to economic development has been endorsed by the West Sussex Economic Strategy and is also central to enabling the Coast to Capital LEP to deliver its strategic priorities.



The Coastal West Sussex Partnership Board, therefore, has a key role in driving and supporting sustainable economic growth. In particular, it has roles in advocating; influencing; gathering and sharing intelligence; promoting; brokering; and co-ordinating to ensure that business interests are best served locally and that public sector interventions are made at the right spatial level to maximise impact. It enables issues to be highlighted and addressed across local authority boundaries, providing economies of scale and giving its constituent boroughs and district a stronger voice on strategic local economic development issues.

This economic profile sets out a narrative for the Coastal West Sussex functional economic area that can be articulated internally and promoted externally, identifying key priorities and actions to be delivered over the next three years; with the aim of raising the

profile of Coastal West Sussex as an attractive location for investment and successful businesses.

The Coastal West Sussex Area

Coastal West Sussex has a population of around 429,000¹ and is one of the most sought after places to live in the United Kingdom. It is a diverse area with Worthing at its geographical centre. It is sandwiched between the major commercial centres of Brighton & Hove and Portsmouth and much of it is within easy reach of Gatwick International Airport and London's commercial centre. It has its own gateways to Europe, the South Downs National Park is on its doorstep, and its varied coastline is a focus for leisure, pleasure and business. It is well served by colleges, universities and public and private sector schools, and it has a cultural heritage that is difficult to match.

Historically, there has been a strong focus on Coastal West Sussex's urban areas (Chichester, Littlehampton, Worthing, Shoreham, Bognor Regis and Selsey). This focus remains important, but there is now a clear recognition of the value of partners working together across the whole of the Coastal West Sussex and with partners in neighbouring areas to support sustainable economic growth.

Coastal West Sussex has some of the most fertile land in England, making it one of the country's most prominent food and plant growing areas. It also has strengths in Advanced Engineering; Marine; Tourism; Social Care; and the Creative Industries. It is home to some of the UK's most successful businesses and Shoreham Port is one of the best-equipped ports of its kind in England.

Coastal West Sussex has not been untouched by the 2008/09 banking crisis, however. There were 3,000 fewer residents in work in 2011/12 than there had been in 2007/08 and business start-up rates have fallen. Many of its jobs continue to be low paid. The strength of its public sector has helped to maintain some economic buoyancy, but it needs a more robust private sector to offset expected reductions in public sector employment and to improve average incomes that have not kept pace with property prices.



¹ This is the population for the whole of Adur, Arun, Worthing and Chichester Districts/Boroughs. However, the rural parts of Chichester and Arun Districts are not strictly within the Coastal West Sussex Partnership area.

Executive Summary

In 2012, 74.9% of Coastal West Sussex's working age population (193,000) were in employment. An additional 8,000 people would need to find work by 2020 just to maintain this employment rate and 21,000 more people would need to be in jobs for there to be an 80% employment rate.

Coastal West Sussex has excellent development and regeneration opportunities that could transform the area's economy and provide significant numbers of new jobs and homes, with the right investment. The largest of these are at Shoreham Harbour and Enterprise@BognorRegis, but there are other, significant development opportunities around Littlehampton and on the Worthing seafront, which could improve its profile as a visitor destination and enhance its attractiveness to business investors. Coastal West Sussex's town centres also need on-going investment and support to diversify their retail offers,

upgrade and expand their office accommodation and improve their public realm so that they become thriving commercial centres.



Challenges, Priorities and Actions

Each of the Districts and Boroughs has its own distinct local needs, but there are common issues that transcend local authority boundaries and where better co-ordination, communication and economies of scale could have a greater long-term positive impact on the Coastal West Sussex economy. There are five priorities, under three themes, that together aim to strengthen the resilience of the Coastal West Sussex economy during these turbulent times and position it well so that it can prosper in calmer economic times.

Theme A: People

- I: Understand and Strengthen Business Supply Chains and Networks
- II: Match Skills to Business Needs

Theme B: Place

- III: Secure Investment to Develop Commercial Property and Support the Regeneration of Town Centres
- IV: Improve Transport and Communications Infrastructure

Theme C: Promotion

- V: Improve Coastal West Sussex's Attractiveness to Investors

The actions that underpin these priorities focus mainly on the positive interventions that the Coastal West Sussex Partnership Board can make to add value to existing activity and to support the wider West Sussex and Coast to Capital economic development agendas. Management, monitoring and review will be undertaken against a set of success measures by the Coastal West Sussex Partnership Board and senior executives.

Contents

Contents

About this Document	10
Setting the Context	11
2.1: Re-Balancing the Economy	11
2.2: Devolving Decision-Making	12
2.3: Promoting Enterprise and International Trade	13
2.4: Growing the West Sussex Economy	14
2.5: A New National Park	14
About Coastal West Sussex	15
3.1: Geography and Demographics	15
3.2: Economic Trends	16
3.3: Recreation, Culture and Leisure	18
3.4: Businesses	19
3.5: Education and Learning	20
3.6: Transport and Communications	21
3.7: Employment Sites and Premises	22
The Districts and Boroughs	24
4.1: Adur	24
4.2: Arun	26
4.3: Chichester	29
4.4: Worthing	32

Themes, Priorities and Actions	34
Priority I: Understand and Strengthen Business and Supply Chain Networks	36
Priority II: Match Skills with Business Needs	37
Priority III: Secure Investment to Develop Commercial Property and to Support the Regeneration of Town Centres	38
Priority IV: Improve Transport and Communications Infrastructure	40
Priority V: Improve Coastal West Sussex's Attractiveness to Business	41
Management, Monitoring and Review	43
Annex 1: Data Tables	44



1. About This Document

This document has been developed by *Nairne Ltd* and *this is regeneration ltd* on behalf of the Coastal West Sussex Partnership Board.

It provides the Coastal West Sussex Partnership with shared priorities to support sustainable economic growth and business development in the area over the next three years. It recognises the distinct roles different partners have in contributing to these priorities, acknowledges the different challenges and opportunities within its constituent parts; and it aims to improve the co-ordination of economic development interventions at different spatial levels. The strategy is set within the changing economic and organisational context.

The Coastal West Sussex Partnership has a key role in promoting economic growth and business development across the coastal areas of Adur, Arun, Worthing and Chichester:

- It co-ordinates activity between its constituent local authorities and enables them to have a greater collective voice on issues of mutual concern;
- It provides a forum for businesses to set and to influence public policy on issues that impact on business and economic performance;
- It is an important vehicle for setting local economic development priorities; and
- It is a conduit for delivering the Coast to Capital LEP area's strategic priorities.

However, there is a limited understanding of Coastal West Sussex as a functional economic area that can be promoted to potential investors. This document aims to change that. It provides the Coastal West Sussex Partnership Board and partners with the tools to articulate a coherent narrative about its economic assets and challenges, so that their joint approaches have maximum positive impact on the development of the Coastal West Sussex economy.



The document has been informed by a range of economic intelligence drawn from:

- Publicly available datasets;
- Previously developed strategies and plans and published reports; and
- Consultations that have informed this and other associated documents.

It will be underpinned by an action plan that sets out how the Coastal West Sussex Partnership will contribute to the growth and development of the local economy.



2. Setting the Context

2.1 Re-Balancing the Economy

The impact of the 2008/09 international banking crisis and the election of a Conservative-Liberal Democrat coalition Government in 2010 have fundamentally shifted the context for promoting local economic development and business growth. In the middle of 2012, nearly four years after it first slipped into negative growth, the UK economy was back in recession. Indeed, in ten of the previous seventeen quarters, the UK economy had shrunk, and in 2012 the whole economy was still worth over 4% less than it had been before the crisis began.

National economic prospects remain uncertain, with the sovereign debt crisis in the Eurozone still unresolved and tightening credit conditions and fiscal consolidation in the UK constraining domestic consumption. However, Office for Budget Responsibility (OBR) forecasts² a return to 2% growth in 2013, rising to 2.7% in 2014. The Bank of England

expects there to be a “gradual pickup in economic activity” into 2013 and beyond³, with output recovering to its pre-recession levels in 2014.

However, when the UK economy recovers, it may have a different complexion to the one that entered the recession. The Government has an ambitious deficit reduction and public service reform programme, aimed at rebalancing the economy towards private sector jobs growth. Its “Plan for Growth” identifies four main ambitions:

- To create the most competitive tax system in the G20;
- To make the UK one of the best places in Europe to start, finance and grow a business;
- To encourage investment and exports as a route to a more balanced economy; and
- To create a more educated workforce that is the most flexible in Europe.

By the first quarter of 2012 there were

already 414,000 fewer public sector jobs and 367,000 more private sector jobs than there had been four years earlier⁴ and the OBR estimates that there will be 1.7m more private sector jobs and 710,000 fewer public sector jobs by 2017.⁵ It aims to encourage growth in key sectors of the economy, including health and life sciences; advanced manufacturing; construction; digital and creative industries; retail; professional and business services; the space industry and tourism⁶.

² Office for Budget Responsibility Economic and Fiscal Outlook March 2012

³ The Bank of England Inflation Report August 2012.

⁴ Public and Private Sector Employment Headcount Office for National Statistics 2012

⁵ Economic and Fiscal Outlook. Office for Budget Responsibility November 2011

⁶ The Plan for Growth HM Treasury and BIS 2011



2. Setting the Context

2.2 Devolving Decision-Making

The Government aims to devolve responsibility for local economic development, so that decisions reflect local circumstances. It has removed a raft of centrally set performance targets; abolished Regional Development Agencies, reconfigured the Business Link support service and introduced a range of measures aimed at encouraging local authorities and their partners to be more proactive in supporting local economic growth. Thirty-nine **Local Enterprise Partnerships** have been established, based on locally defined economic geographies. These have started to set local economic development priorities; invest the £1.4bn Regional Growth Fund; and they act as important links between national government, businesses and local areas.

The National Planning Policy Framework (NPPF)⁷ sets out the Government's vision for delivering

sustainable development and its requirements for the planning system. At its heart is a “presumption in favour of sustainable development”. There is an emphasis on empowering local people to “shape their own surroundings” and an expectation that planning should be a “creative exercise” in finding ways to improve local areas in ways that are environmentally efficient, support social progress and contribute to economic growth.

The Localism Act (2011) gives community groups the right to bid to take over local authority land and buildings in their neighbourhoods. It allows local communities to develop neighbourhood plans to shape new developments; provides local authorities with greater flexibility to manage their housing stock; and gives them a “general power of competence” to do anything that will benefit their local area.

The Government wants local authorities and their partners to find new ways to raise funds to support local growth. The Community Infrastructure Levy (CiL); Business Improvement Districts (BiDs); and Tax Increment Finance (TiF) all aim to do this. From 2013 local authorities will be able to retain a proportion of the Business Rates that they collect over an agreed threshold. These flexibilities are expected to provide local authorities and their

partners with the incentives to take innovative approaches to developing their economies, based on local circumstances and priorities.



2. Setting the Context



2.3 Promoting Enterprise and International Trade

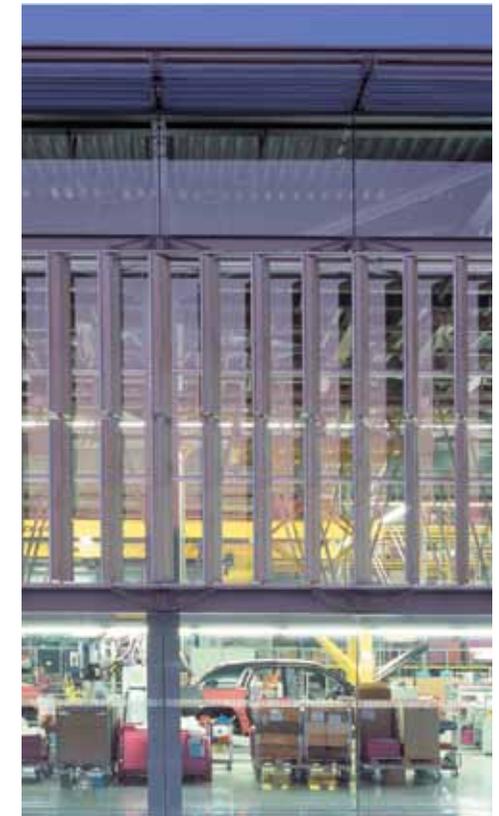
The Coast to Capital Local Enterprise Partnership (C2C LEP), which covers an area that stretches from Lewes to Chichester and from Brighton & Hove to Croydon, has a clear focus on Enterprise and International trade. It has set targets to:

- Support the creation of 100,000 net new jobs in the Coast to Capital area by 2035;
- Increase the proportion of businesses which are internationalised from the level of 12% regular exporters by 1% per annum over the next 5 years (to 2017) – an additional 3,951;
- Increase the level of entrepreneurship and business start-up rate to above the regional and England average – an additional 4500 new businesses over the next 5 years;
- Stimulate business growth, innovation, productivity and

employment across a range of key sectors, bringing GVA and employment growth overall up to at least the regional average;

- Generate the required investment to bring about major catalytic investments in key business locations;
- Create a planning environment which supports business development and growth; and
- Press for and help to secure investment in transport infrastructure, business premises and other infrastructure⁸.

The C2C LEP has signed a Memorandum of Understanding with UKTI to support its FDI activity; is supporting the introduction of superfast broadband; has supported an application for Enterprise Zone status from Enterprise@BognorRegis; is investing Growing Places funds to help bring forward key strategic sites; and is supporting applications to the Regional Growth Fund.



⁷ National Planning Policy Framework CLG 2012

⁸ <http://www.coast2capital.org.uk/articles/our-aims.html>

2. Setting the Context

2.4 Growing the West Sussex Economy

In 2012, West Sussex County Council developed a new, high-level economic strategy, which sets a framework for economic development interventions across the county. It recognises and supports the roles of the Coastal West Sussex Partnership (and other Spatial Area Partnerships) in supporting local economic growth; it acknowledges the diverse nature of the county's constituent parts; and it commits partners to work together to find the best ways to take advantage of new local financing arrangements. As an organisation, West Sussex County Council places a strong emphasis on:

- Focusing its resources on where it can make an impact;
- Ensuring that its different departments and teams are more conscious of the potential impact of their commissioning, procurement and recruitment decisions; and

- Supporting organisations that are best placed to deliver services to do so.

The strategy has seven main priorities, each of which is underpinned by a series of activities:

- Promote West Sussex as a first class business location;
- Understand and respond to the needs of established businesses and support people to start and grow successful enterprises;
- Adapt and respond to new funding conditions and opportunities to ensure that West Sussex secures investment to support its economic development priorities;
- Deliver the transport and communications infrastructure that businesses and residents need;
- Make the best use of land and property to support a robust and sustainable economy;

- Support the creation of a range of jobs that enable people to participate in the labour market in a way that best reflects their needs at different life stages; and
- Support local people to acquire the skills that the economy needs.

This document supports this strategy, focusing on where and how the Coastal West Sussex Partnership can best contribute to these priorities, based on the distinct needs of the area.



2.5 A New National Park

In April 2011, the South Downs became a designated National Park, with its own planning authority. The South Downs National Park covers an area of 1,600 sq. km that stretches from Eastbourne to Winchester and has a population of around 116,000 people. The South Downs National Park Authority (SDNPA) is still at an early stage of development, commissioning studies, including an Employment Land Review, to inform the development of its Local Plan. The SDNPA that includes developing more self-sustaining and empowered communities; creating thriving market towns and villages; and maintaining and promoting successful farming, forestry, tourism and other business activities. Whilst it is strictly outside the Coastal West Sussex Partnership area, the decisions that the SDPNA make are likely to have an impact on local economic and business growth, perhaps particularly relating to employment, residential land allocations and transport.

3. About Coastal West Sussex

This section provides an economic profile of the Coastal West Sussex spatial area, drawing on a range of publicly available data, consultations and previously published studies and reports. It focuses on the area as a whole and then considers its constituent parts.

3.1 Geography & Demographics

Coastal West Sussex has a population of around 429,000⁹ and is one of the most sought after places to live in the United Kingdom. It is a diverse area, sandwiched between the major commercial centres of Brighton & Hove and Portsmouth. Much of it is within easy reach of Gatwick Airport and London; it has its own gateways to Europe; the South Downs National Park on its doorstep; and its varied coastline is a focus for leisure, pleasure and business activities.

Its main urban centres are Worthing, Bognor Regis, Littlehampton, Shoreham by Sea and Chichester. Although it has often been seen as a

place for people to retire to, working age people accounted for 80% of its population growth between 2001 and 2011.

This emerging youthfulness means that there will be a steady supply of labour for businesses, a demand for a wide range of services and a need for better quality jobs that will retain and attract talent. The ‘grey pound’ will continue to be important and the demand for health and social care products and services for its elderly residents is unlikely to abate.

Coastal West Sussex’s links to its neighbours are important. Brighton & Hove’s growing reputation as a young and entrepreneurial centre, particularly for the digital media and creative industries, is now well recognised. Shoreham and Worthing, in particular, are benefitting from the ‘Brighton overspill’ effect, as residents and businesses that the city cannot accommodate relocate to alternative places nearby.

To the west, Chichester is strongly associated with high spending leisure pursuits and has managed to attract high status companies like Rolls Royce. It is also a magnet for creative, innovative people, many of whom set up new businesses in their own. Havant and Portsmouth have historically provided space for some of Chichester’s expanding businesses, but the city’s employers often draw their labour from surrounding areas, stretching into Arun, where property is more affordable.

Although it has often been seen as a place for people to retire to, working age people accounted for 80% of its population growth between 2001 and 2011.

⁹ This is the population for the whole of Adur, Arun, Worthing and Chichester Districts/Boroughs. However, the rural parts of Chichester and Arun Districts are not strictly within the Coastal West Sussex Partnership area.



3. About Coastal West Sussex

3.2 Economic Trends

Like all areas of the country, Coastal West Sussex has not been untouched by the 2008/09 banking crisis and it is likely to continue to be affected by cuts in public spending and a reduction in the public sector workforce over the medium term. There were 3,000 fewer residents in work in 2011/12 than there had been in 2007/08 and a healthy employment rate of 77.0% before the 2008/09 recession had fallen back to 74.9% by 2012.

The private sector, which provided 80% of all jobs in Coastal West Sussex in 2007/08, has been particularly badly affected, with jobs losses across a range of sectors. The economy's relative buoyancy is partly due to the strength of the public sector, which will continue to be an important source of local employment as the population grows and ages. However, Coastal West Sussex will need a stronger private sector to offset expected reductions in public sector employment, some of which could be

achieved by encouraging new market-led ways of delivering local public services.

Business start up rates, three and five year business survival rates and the stock of active businesses have also fallen in recent years, although across the Coastal West Sussex area as a whole, they remain reasonably healthy when compared to the England average¹⁰.

Economic forecasting at national level is a risky business in calm economic times, so it is unwise to adhere too closely to local economic forecasts that have been produced at a time of considerable economic uncertainty. However, key issues for Coastal West Sussex are likely to be:

- Public sector employment is under pressure due to fiscal tightening and a change in how public services should be delivered. However, the demand for public services is likely to remain high in many parts

of Coastal West Sussex, given its demographic structure and projected population growth;

- There is a strong focus on investing in and supporting key sectors of the economy at national level, including Advanced Engineering; Environmental Technologies; Digital Media and the Creative Industries; Health and Life Sciences and Professional and Business Services¹¹. Many businesses in these sectors trade internationally; produce high value products and services and provide good quality jobs. However, they may not all directly provide large volumes of jobs. Coastal West Sussex has a diverse and robust Advanced Engineering sector, a strong and nationally recognised horticultural sector and strong tourism offer, and the area may also have locational advantages focusing on the environmental technologies sector (access to the English Channel and the South Downs National Park);

and Digital Media and the Creative Industries presence (proximity to Brighton & Hove);



¹⁰ Note: Business start up, density and survival rates are much higher in Chichester than in other parts of Coastal West Sussex

¹¹ The Plan for Growth. HM Treasury March 2011

3. About Coastal West Sussex

- Employment in lower level manufacturing has been contracting over decades, due to technology improvements and international price-based competition. Parts of Coastal West Sussex remain vulnerable to these structural changes and there is a need for its manufacturing to move up the value chain and to diversify the local economic base, so that it has a stronger presence of higher value employment activities;
- Technology and lifestyle choices mean that skilled people can be increasingly flexible about how and where they work. This lends itself to people working in smaller units, or even from their homes and it places a strong emphasis on ensuring that places are attractive to live and work in and have the digital and physical infrastructure that mobile people need;
- Forecasters consistently suggest that there is a growing demand

for people with higher-level skills and that people with low skills are increasingly vulnerable in the labour market. However, 'Elementary' occupations, particularly in the service sector, are likely to continue to be an important feature of many economies, providing fairly low paid, but often flexible jobs, to those that need or want them; and

- Creating a more sustainable and energy efficient economy is a long-term priority for most Governments, most of which are looking for ways to support the development of a strong environmental technologies sector.

Projected population growth alone means that around 8,000 more people will need to be in work by 2020 just to maintain the current 74.9% employment rate. However, 21,000 more people will need to be in jobs by then for Coastal West Sussex to have a healthy 80% employment rate.

Coastal West Sussex will need a stronger private sector to offset expected reductions in public sector employment, some of which could be achieved by encouraging new market-led ways of delivering local public services.



3. About Coastal West Sussex

3.3 Recreation, Culture and Leisure

Coastal West Sussex is recognised for its high quality leisure and recreation, including horse racing Goodwood and Fontwell Park; yachting, sailing and watersports activities at Chichester and Littlehampton harbours; surfing and diving off windswept Selsey Bill and Bracklesham Bay; and family seaside facilities at Witterings beach, Bognor Regis, Littlehampton and Worthing.

A study into the culture in Coastal West Sussex¹² found that it had a “high concentration of cultural and sports organisations”, compared with similar sized areas across the South East region. Chichester Festival Theatre has a well-established international reputation and there are smaller theatres in Worthing, Bognor Regis and Shoreham. There are annual arts festivals and events to suit all tastes, including the Rox arts and music festival and the End of Pier International Film Festival in Bognor Regis; the Birdman Festivals

in Worthing and Bognor Regis; and annual festivals in both Adur and Arundel. There are visual arts galleries in Chichester, Worthing, Shoreham and Bognor Regis and a range of different museums of across Coastal West Sussex.

Both the University of Chichester and Northbrook College provide a range of creative and cultural courses (including Theatre Performance, Musical Theatre, Graphic Design, Commercial Music, Dance, Drama, Fine Art, Media Studies, Performing Arts, and Popular Music Performance), and the South Coast Design Forum is a strong advocate for the area’s artists and designers.

The Culture and the Coastal Strip report emphasises the importance of culture in supporting economic development and regeneration and suggests that a joined up approach to supporting and promoting the area’s cultural offerings could create a “critical mass” that would raise the profile and improve its image. It recommends

developing a cultural masterplan that would include developing the cultural infrastructure; providing support services, accessible creative spaces and meeting places; developing educational provision and opportunities for young people; encouraging cultural enterprise; and developing a range of night time economy activities.

A study into the culture in Coastal West Sussex found that it had a high concentration of cultural and sports organisations, compared with similar sized areas across the South East region.



¹² Culture and the Coastal Strip Sussex Arts Marketing (sam) and the West Sussex Arts Partnership (2008)

3. About Coastal West Sussex

3.4 Businesses

The quality of light and soil means that Coastal West Sussex has some of the most fertile land in England, making it one of the country's most prominent food and plant growing areas. It also has strengths in Advanced Engineering; Tourism; Health and Social Care; and the Creative Industries and it is home to some of the UK's most successful businesses. Examples of these include:

- Rolls Royce has a significant base in Chichester;
- Ricardo, a leading global multi-industry engineering provider of technology, product innovation and strategic consulting is based in Shoreham-by-Sea;
- B&W Speakers, an international market-leader in the production of loudspeakers and sound equipment and a Queens Award winner for Innovation in 2012 is based in Worthing;

- Northshore, a world leader for variable draft cruising yachts is in Chichester;
- Cameron Measurement Systems, a world leader in chart recorders, turbine meters, flow analysers and positive displacement meters is in Bognor Regis;
- MG Duff, which one of the world's largest suppliers of systems and services to the marine market is based in Chichester;
- Tangmere Airfield Nurseries, one of the largest pepper nurseries in Europe is in Chichester;
- Butlins Skyline Ltd, one of the UK's most prominent holiday providers has its main holiday centre in Bognor Regis; and
- Natures Way are leaders in fresh producer manufacturing. It operates from three state-of-the-art factories, two of which are located on the Chichester Food Park and a third outside Selsey.



GlaxoSmithKline, the Environment Agency, Southern Water and the Inland Revenue also have a significant local presence and there are few more successful ports than Shoreham Port. It services 700-800 ship movements and helps to transport 1.8m tonnes of cargo each year, and is attractive to a range of businesses linked to the transport and treatment of cargo because of the quality of its facilities and infrastructure.



3. About Coastal West Sussex

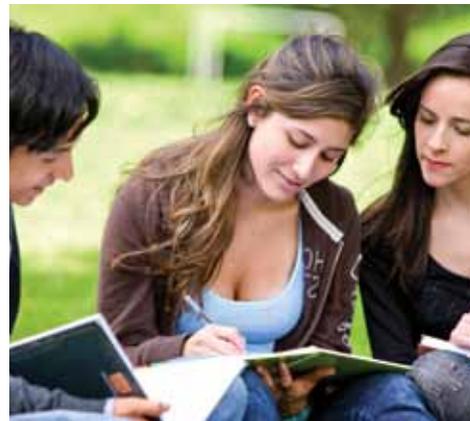
3.5 Education and Learning

Coastal West Sussex has several high performing schools and colleges in the public and private sectors, including:

- The University of Chichester, which has campuses in Chichester city and Bognor Regis has developed an international reputation for research in Sport and Exercise Sciences and has high levels of student satisfaction for its History, English & Creative Writing; Media Studies and Sports Science courses in particular;
- Chichester College, which is a market leader and Queens Anniversary Prize winner for international education, with more than 2,500 international students from 80 different countries;
- Worthing College is a local college, soon to be located in 18 acres of park land at The Warren, on the southern edge of the South Downs National Park. It provides learning for 1,700 students; and

- Northbrook College, which has specialisms in aeronautical engineering and which has recently become a National Skills Academy Hub for Environmental Technologies
- Lancing College, which counts Sir Tim Rice and Tom Sharpe amongst its creative and notable alumni; .

The universities of Portsmouth, Southampton, Brighton, Sussex and Surrey are all close by and between them provide a vast range of internationally recognised teaching and research.



3. About Coastal West Sussex

3.6 Transport and Communications

Many parts of Coastal West Sussex are within reach of two international airports (Gatwick and Southampton) and four ports (Shoreham, Newhaven, Portsmouth and Southampton) that provide routes for transporting both passengers and cargo around the world. Coastal West Sussex also has its own airport (Brighton city Airport at Shoreham) from which Brighton City Airways is planning to operate twice daily scheduled services between to and from Paris (Pontoise).

There are direct rail links from most parts of the Coastal West Sussex to major commercial centres, including Brighton & Hove; Portsmouth; Southampton; Crawley; Croydon and Central London.

East-west road links along the A27 connect Coastal West Sussex with Brighton & Hove, Portsmouth and Southampton, whilst the A23 and A24 provide northbound connections to Gatwick Airport, Guildford, Croydon and the M25 London orbital. However, road connections can become

congested in places at times, so there is a strong emphasis on promoting more sustainable transport use.

Access to superfast broadband connections has the potential to make a real difference to business and residents across Coastal West Sussex. It is widely recognised that better access to broadband can stimulate economic growth by encouraging business to grow and invest in the area and by improving individuals quality of life by facilitating home working, start up businesses and better access to communication channels.

The Coastal West Sussex Partnership is working closely with the Coast to Capital LEP and West Sussex County Council on the Better Connected project. This aims to bring faster broadband to all parts of the area, using fibre optic, advanced copper, satellite and wireless technologies. Better communications technology is expected to transform how people work, live and communicate.



3. About Coastal West Sussex

3.7 Employment Sites and Premises

It can be difficult to find business premises and new employment sites in and around protected areas as Coastal West Sussex is squeezed between the South Downs National Park and the English Channel therefore some parts can be perceived as being remote. However, it has some of the best development opportunities in the Coast to Capital LEP area.

- **Shoreham Harbour** covers an area around 70 hectares, stretching into Brighton & Hove and is one of the most significant regeneration opportunities in the South East of England. It is currently a thriving commercial port, but in the wider regeneration area, there is a broad range of commercial, leisure and residential development opportunities, which include the Western Harbour Arm, Southwick Waterfront; Aldrington Basin; and within South Portslade industrial estate. There is targeted additional

new employment floorspace in Adur that includes 26,000 sq.m (Western Harbour Arm) and 7,500 sq.m in Brighton & Hove (Aldrington Basin and South Portslade) The aspiration is to improve the business environment for new and existing businesses, to provide skills training opportunities and to create around 2,000 new jobs Digital Media businesses in Brighton & Hove will be encouraged to take up opportunities in the Harbour and supply chains will be strengthened. There are also plans to develop between 1,200 and 1,600 new homes in the Adur and 400 new homes in the Brighton & Hove part of the Harbour by 2028, transforming the eastern part of the Coastal West Sussex economy and building on Brighton & Hove's recent economic successes. Shoreham Port Authority owns large parts of the Harbour and its masterplan sets out plans to expand its throughput by 25%; to consolidate its commercial

activity around port-related activity; to support renewable energy commercial opportunities; and to respond to unmet demand for more marine leisure facilities.

- **Enterprise@BognorRegis** is an area on the north west of Bognor Regis that includes approximately 60 hectares of 'clean sites' with the potential to accommodate over a thousand jobs. An Enterprise Zone application in 2011 sought to build on the strengths of the local area and included proposals for an Advanced Manufacturing Park; a Knowledge Park for high specification office development; a campus of small business and studio units; a university hub with incubator units; and a leisure park and watersports centre. Although this was not successful, the application process "has stimulated fresh thinking on the opportunities" in Bognor Regis. An Interim Planning Policy Guidance report for Arun District Council¹³

identifies four strategic objectives for enterprise@BognorRegis, which include: providing significant new employment opportunities; providing employment-led development; providing different types and sizes of employment space; and delivering new supporting infrastructure.

¹³ Clinterim Planning Policy Guidance on enterprise@BognorRegis (Draft). Nathaniel Lichfield & Partners (July 2012)



3. About Coastal West Sussex

As well as these two sites, there are other significant development opportunities that would help to secure sustainable economic growth within Coastal West Sussex:

- In Worthing, there are a number of sites on the seafront, which could improve the visitor and cultural offer in the Borough and make Worthing into one of the south coast's principal entertainment and leisure hubs;
- Shoreham Airport, which is already home to around 50 businesses has scope for further commercial development;
- There are sites in and around Littlehampton including the West Bank development opportunity that provides scope for much needed office and flexible industrial development. It is envisaged that the West Bank will be developed with a mix of uses that could include commercial, leisure, residential, hotel and marine related industries; and

- The Glenmore Business Park in Chichester is on a 10.34 acre site and has planning consent for 188,000 sq.ft of B8 accommodation and is also considered suitable for other uses, including a hotel; self storage; trade counter; residential and B1/B2 uses.
- In Chichester there are development sites and opportunities in Tangmere, Barnfield Drive and Terminus Road.



There has been, and there will continue to be, significant investment in improving Coastal West Sussex's town centres, diversifying their retail offer, upgrading and expanding office accommodation and making public realm improvements so that they are thriving commercial centres that support their hinterlands, serve their residents and attract new visitors and investors.



Coastal West Sussex has some of the best development opportunities in the Coast to Capital LEP area.

4. The Districts and Boroughs



4.1 Adur

4.1.1 Geography and Demographics

Adur is one of the smallest districts in England with a resident population of just over 61,000, covering an area of 16 sq. miles (including the South Downs National Park area). It has five urban centres, the most significant of which are Shoreham-by-Sea and Lancing and is bisected by the River Adur. There are seven Conservation Areas and 118 listed buildings in the District, which include Lancing College and Shoreham Airport terminal building.

The age profile of its residents is not dissimilar to that of West Sussex as a whole and population growth between 2001 and 2011 (+2.7%) was slower than in any other district in the county. The emerging Local Plan suggests that there is likely to be a “significant increase” in the number of elderly residents. However, the structure of the District’s population may change if its strategic sites can provide housing for families and working age residents.

4.1.2 Economic Profile

Adur’s strength has traditionally been its industrial base, although its economy is also linked closely with that of its larger neighbours - Brighton & Hove and Worthing. More than one in ten of its jobs continue to be in the manufacturing sector, whilst the presence of Shoreham Port means that it is a

good location for businesses linked to the supply and treatment of cargo. However, in common with many industrial areas, Adur has struggled to adapt to the changed macro-economic environment. Despite local resilience, manufacturing employment has been contracting over the long-term as international competition and the introduction of new technologies has made much of the sector less labour intensive, but more reliant on higher skilled labour.

This has left many of Adur’s lower skilled residents vulnerable and it has contributed to a widening of the gap between local and regional average earnings. Its commercial floorspace is heavily biased towards manufacturing/industrial and warehouse and there is only a limited supply of commercial office space, the quality of which is mixed.

The Adur Employment Land Review (2011) suggests that there may be opportunities for growth in:

- Port-related activities;
- High-tech manufacturing;
- Construction (particularly linked to the Port);
- Environmental technologies; and
- Retail (linked to the expansion of Shoreham Town Centre).

4.1.3 Development Opportunities

The supply of land and premises for employment in Adur District is limited. However the quality of sites and premises is generally sub-standard and there is a need to identify additional high quality sites to meet market demand. Furthermore, the office market is under-developed and may need to improve if Adur is to increase its supply of higher value added jobs. The Adur Employment Land Review (2011)¹⁴ estimates a demand for an additional 13,730 sq. m of office floorspace and 16,060 sq. m of industrial/warehouse floorspace and a further 20,000 sq. m of B2/B8 floorspace to accommodate relocations from Shoreham Harbour. Potential development sites include:

- **Shoreham Harbour:** There is a strong rationale to intensify land use and attract higher value uses through mixed use redevelopment, including new office, retail and residential uses and improving access to the waterfront and integration of this with the Town Centre;
- **Shoreham Airport:** currently includes over 50 businesses, most of which are linked to aviation. The Airport has a concentration of higher value-added business occupiers. Redevelopment is likely to require access improvements and to take account of visual impacts;

4. The Districts and Boroughs



- **Lancing Business Park:** This is one of the largest employment sites in Coastal West Sussex and is a Business Improvement District. There are likely to be a range of opportunities for redevelopment for employment use;
- **Shoreham Town Centre:** The Civic Centre site could be more intensively used and designed to provide a stronger gateway to the Town Centre;
- **Dolphin Road:** This is generally a good quality employment site which is well used, and which has opportunities for further employment development; and
- **Riverbank Business Centre:** There is an opportunity for mixed-use redevelopment to deliver new office suites and workshop space for SMEs close to Shoreham Town Centre.

Shoreham Harbour and Shoreham Airport are the “key opportunities for development and growth” and the District could benefit from spillover effects from the growth in Brighton & Hove’s Creative Industries and Digital Media sector.

4.1.4 Assets

Adur’s economic assets include:

- **Manufacturing and Advanced Engineering:** These sectors are important to Adur’s economy. Ricardo, for example, designs, develops and

researches internal combustion engines, gearboxes and transmission systems; vehicle acoustics; and motorcycles, mopeds and scooters. Shoreham Airport is home to several aeronautical businesses; and there are marine related activities linked to Shoreham Port;

- **Port Related Activity:** Shoreham Port is a thriving niche commercial port that employs 1,400 people. It transports 1.8m tonnes of cargo (mainly aggregates, timber, scrap metal, cereals, oil and steel), but it has the potential to increase this to 2.1 tonnes by 2026. There is the potential to expand the marine leisure sector; increase port-related business activities, such as steel processing, timber treatments, and green power regeneration; and service the off shore windfarm¹⁵;
- **Development Opportunities:** Shoreham Harbour is a major regeneration opportunity with the potential to provide jobs and homes across a range of sectors over the long term. It stretches for three miles along the coast into Brighton & Hove. There are also development opportunities associated with Shoreham Airport;
- **Connectivity:** Adur has good transport links to Brighton & Hove, Worthing, Chichester and north to Gatwick Airport, Croydon and London. Its proximity to Brighton & Hove provides it with opportunities to diversify its economy; to attract

new residents with greater local spending power and for its businesses to develop new markets and supply chains across a wider area; and

- **Culture, Recreation and Leisure:** The annual Adur Festival runs for two weeks every June; there is a range of recreational activities along the coast and in the South Downs National Park; and Adur is within easy reach of Brighton & Hove with its multitude of entertainment venues, bars and restaurants.

4.1.5 Challenges

Adur’s economic challenges include:

- **Social Deprivation:** There are significant pockets of social deprivation, particularly relating to low skills and qualification levels. Employment rates are fairly high, but average earnings are low and a large number of residents work in Worthing or Brighton & Hove;
- **Educational Performance:** GCSE attainment at its secondary schools was below the county average, although this is now an improving picture;
- **Underdeveloped Office Market:** The office market is under developed, the office accommodation stock is generally in older buildings and rental values are insufficient to support speculative development; and
- **Flood Risks:** A significant amount of land in Adur is subject to tidal flooding due to the River Adur and the District’s coastal location.

¹⁵ Shoreham Port Masterplan (2010)

4. The Districts and Boroughs



4.2 Arun

4.2.1 Geography and Demographics

Arun has a population of just under 150,000 and covers an area of 46 sq. miles. The District is divided by the River Arun and it has two main coastal urban centres, Bognor Regis and Littlehampton, which account for around 80% of the total population.

Arundel is the principal inland urban centre and is an important visitor destination.

Arun has the highest proportion of post-working age residents in West Sussex – more than one in four (26%) of its population is aged 65+, and there are 12,500 residents aged 80+. However, this hides wide disparities within the District. In some of the smaller villages, retired residents can outnumber the working age population, but in the main urban centres there is a much greater concentration of younger people and families.

In common with many other parts of West Sussex there was a decline in the 0-15 year olds living in the District between 2001 and 2011, but a significant increase in the number of residents in several other age groups, most notably 16-24 year olds, perhaps reflecting the growing presence of the University of Chichester in the District.

Arun has considerable natural assets, both along the coast and inland, where much of the District is now covered by the South Downs National Park. It also has more than 700 listed buildings and 28 Conservation areas.

4.2.2 Economic Profile

Arun's two main coastal towns, Bognor Regis and Littlehampton are the key economic drivers of the coastal part of the District.

Bognor Regis is the largest retail centre in Arun. It also has a concentration of manufacturing and warehousing, whilst the health and social care sector is also important to the town. It has benefited from significant investment in recent years. Butlins Holiday Centre has opened three large hotels and is planning further investment; and there are plans to increase the student population at the University of Chichester's campus from around 1,000 students to 2,400 by 2016. The Bognor Regis Masterplan sets out plans to reposition Bognor Regis as a "first class coastal destination", with a revitalised town centre; an expanded role as an education centre; improved seafront and leisure facilities; transport improvements and new housing and employment developments".

Littlehampton also has a strong manufacturing and warehousing presence and retail is an important source of employment. It has an expanding marine leisure sector and small-scale fishing operations. The Littlehampton Vision which was adopted in 2004 includes plans to make the town centre more attractive and competitive; improve attractions and facilities for residents and visitors; and to develop Littlehampton Harbour into a leisure based asset that becomes a major feature of the town. A considerable amount of work on a range of sites identified within The Vision has already been undertaken and continues. There is also scope for commercial development and to enhance existing employment space at Littlehampton West Bank, which could contribute significantly to the overall vibrancy of the harbour.

Arundel is the other main urban centre and is located inland on the A27 and falls outside the Coastal West Sussex area. It is a significant visitor destination, but development is constrained by the quality of its natural environment. The remainder of Arun is largely rural and made up of a range of villages, where levels of home working tend to be quite high.

4. The Districts and Boroughs



'Open for Business', the District's economic strategy (2009-2026) identifies the following sectors as key to the local economy:

- Horticulture;
- Knowledge-based manufacturing;
- Tourism; and
- Health and social care.

It suggests that there is a need to create more, better quality jobs to accommodate projected population growth and to reverse the high levels of out-commuting from the District.

Across the District, there is greater demand for industrial space than for office space.¹⁶ Most of the demand is for smaller, flexible industrial units and very little comes from outside the District. Arun is not regarded as a centre for office development and there is no significant provision across the District. The Arun Employment Land Review suggests there is a need for Arun to diversify its economic base away from more traditional manufacturing into higher value added manufacturing activities and some office based functions. It suggests that there may be modest growth in environmental services, IT, higher value engineering and in the creative industries, whilst healthcare, construction, education, retail and waste are also likely to generate moderate levels of growth.

4.2.3 Development Opportunities

Arun has a relatively large stock of employment space, but current demand is mainly from local businesses for smaller industrial units. There is a shortage of modern business accommodation and little interest from businesses outside the district, partly due to a lack of suitable premises and partly because other locations have better strategic access. There is little office provision locally and what exists is generally old. If Arun is to diversify its economy, it will need to be attractive to higher value engineering and more businesses involved in office-based activities. There is currently little start up provision to support indigenous business growth. Meeting the demand for employment space is largely dependent on bringing forward Enterprise@BognorRegis, the largest allocated site being Oldlands Farm. In 2011, the Coast to Capital LEP submitted an Enterprise Zone bid for Enterprise@BognorRegis, a 180-hectare site on the north west of Bognor Regis. The proposals included:

- a) An Advanced Manufacturing Park on Oldlands Farm;
- a) A Knowledge Park for primarily high quality office development on the Salt Box and Rowan Caravan Park sites;
- b) A campus of small business and studio units on the site of the former LEC airfield;

- c) A university hub with business incubator units in conjunction with the University of Chichester;
- d) A combined leisure park and watersports centre development on the Butlins site to complement their development plans;
- e) Upgrading and intensification of a number of existing industrial areas; and
- f) A retail and leisure hub expanding upon committed investment.

Although, unsuccessful, this site remains an important development opportunity. The Interim Planning Policy Guidance report (2012) identified four strategic priorities for the site that include providing significant new local employment, employment-led development; different types and sizes of employment space; and delivering new infrastructure. It is anticipated that developments in the zone, which has four main elements¹⁷, will be phased over a number of years from 2013.

Other development sites in the District include:

- **St. Martin's Car Park, Littlehampton**, which has been identified as the only suitable site capable of accommodating town centre office accommodation;
- **Littlehampton West Bank**, although primarily a residential development, provides opportunities to

¹⁶ Employment and Economic Land Assessment for Arun District Council, Nathaniel Lichfield and Partners (Dec 2010)

¹⁷ The former LEC Airfield and Adjoining Land, Oldlands Farm; Saltbox and Rowan Caravan Park

4. The Districts and Boroughs



support harbour-related commercial activities; and

- **North Littlehampton**, which may provide an option for accommodating new office provision outside of the town centre.

4.2.4 Assets

Arun's economic assets include:

- **Horticulture:** The climate and land provide ideal conditions for agricultural and horticultural development, both of which are significant to the District's economy;
- **Advanced Manufacturing:** Knowledge based manufacturing is key part of the District economy and there is some potential to develop the marine related sector further;
- **Health and Social Care:** The older age profile of its resident population means that the health and social care sector is strong and is likely to continue to provide business opportunities in the future;
- **Tourism:** Arun is a popular visitor destination, particularly for families. The Butlins Holiday Centre is an important part of the Bognor Regis economy and Butlins Skyline has continued to invest in the local area;
- **Development Opportunities:** The Enterprise@ BognorRegis Enterprise Zone proposal demonstrated that there are development ready

sites in Arun;

- **Education:** The University of Chichester has a strong and expanding presence in Bognor Regis and has recently opened the Dome Enterprise Centre to support new growth businesses;
- **Rail Links:** There are direct rail links to Brighton & Hove, Worthing, Chichester, Portsmouth and Gatwick Airport; and
- **Quality of Life:** Arun offers an enviable quality of life. It is a popular holiday destination and is home to the expanding Butlins Holiday Centre and Littlehampton Harbour. It has a high quality natural environment, with access to a varied coastline and the South Downs National Park.

4.2.5 Challenges

Arun's economic challenges include:

- **Low Earnings:** Levels of out-commuting are high reflecting the low quality of many of the jobs in the District. More than half the District's jobs are in distribution, hotels & restaurants and public administration, education and health;
- **Weak Road Transport Links:** Improving the A29 to enable access to employment land at Bognor Regis is a local priority, whilst both the A259 and A27, which run east-west can suffer from severe congestion. North-south road links are not strong. However, the extension of the Fitzalan

Road/Lyminster By Pass which will run from Littlehampton seafront to Crossbush, past the new North Littlehampton development should improve this;

- **Social Deprivation and Low Skills:** The District is characterised by both affluence and deprivation. Around one in six children live in low income households, skills levels and educational attainment are low and worklessness is high in parts of the District;
- **Demographics:** Arun has a growing elderly population and can find it difficult to retain young talent due to high house prices and relatively low paying jobs;
- **Town Centres:** Bognor Regis and Littlehampton are essentially locally serving town centres, but they lack a wide range of shopping, entertainment, employment and other facilities, and therefore struggle to compete with neighbouring centres outside the district; and
- **Weak Office Market:** There is limited high quality office provision and limited external demand. Low rent levels and peripheral location inhibit speculative development, making it challenging to diversify the economy.

4. The Districts and Boroughs



4.3 Chichester

4.3.1 Geography and Demographics

In 2011, Chichester had a population of around 114,000, 7,000 more than in 2001. Chichester City is the heartbeat of the District and is a well-known cultural and retail centre. Other urban centres include Midhurst, Petworth and Selsey, of which only Selsey lies within the Coastal West Sussex area.

Like Arun, it has a large post-working age population (24%), which has increased at a much faster rate than its working age population over the past decade. Indeed, there was only a very modest (+1,700) increase in the number of residents aged under 50 years between 2001 and 2011.

Chichester is located on the western edge of Coastal West Sussex. It has close links to Havant and Portsmouth in south Hampshire, where land supply is more plentiful. It is largely a rural district with a high quality natural environment that supports a significant land-based activity.

Three-quarters of the District is classified as an Area of Outstanding Natural Beauty and much of it is now within the South Downs National Park. It also has a varied coastline, a rich cultural heritage and a vast range of high profile recreational opportunities. Chichester Harbour and Selsey Bill are notable

features of the Chichester Coast, but much of the District falls outside the Coastal West Sussex area.

4.3.2 Economic Profile

The public sector is a significant provider of employment in Chichester. The city has District Council and County Council offices, a large Further Education College, a hospital and the University of Chichester. Other key market sectors are:

- Food production;
- Advanced Engineering (particularly in the south of the District); and
- Tourism, recreation and leisure.

Overall, its population is well-educated, but average earnings for full-time employees tend to be low, reflecting the low value added nature of many of its dominant sectors.

Chichester is attractive to creative people and also has a large number of home based businesses, because of the good quality of life that it provides. Chichester is one of the most sought after places to live in England. Its 'reputation for 'high end' recreation and leisure (polo at Cowdray Park; yachting at Chichester Harbour and horse-racing at Goodwood, for example), makes it attractive to 'high end' brands like Rolls Royce, but it can also mean that house

prices are out of the reach of local workers. The area has had over £150 million of inward investment success in the past decade, alongside Rolls Royce companies like Carte Blanche and Resperonics have located in the area and companies such as Princess Food, Technolex, Wiley, Northshore Yachts and Montezuma's Chocolates have all expanded or consolidated their operations in the area. However, the space to accommodate or attract new growing businesses is limited.

The Chichester District economic strategy places a strong emphasis on job creation, developing and retaining local talent from the university; maintaining the vitality of the market towns in rural and coastal areas; and capitalising on the strengths of Chichester City:

Chichester City: Chichester City is the main commercial and administrative centre of the District. It is also has significant retail and cultural presence that attracts visitors and shoppers from a much wider area than the city itself. The public sector is a major source of local employment and the city also provides the majority of the district's manufacturing and professional services. It is a popular visitor destination for tourists, who are attracted by its history and its strong arts and cultural heritage.

4. The Districts and Boroughs



Selsey: Selsey is the main coastal town in the District and it has many of the challenges that are faced by most coastal towns. It has struggled to fill new industrial units, but with its seaside location, the marine sector has become an important part of the local economy. In 2007, a Vision for Selsey High Street was produced that set out plans to revitalise the town's high street.

4.3.3 Development Opportunities

The demand for both industrial and commercial premises across the District is strong and the Chichester Employment Land Study (2009), suggested that commercial rental values are low when compared with returns on residential developments, and that there is a lack of suitable employment land. Employment space in the District is constrained by its extensive designated environmental protection areas and floodplains. However, it remains popular, which means that vacancy rates for both offices and industrial/warehousing premises are low. However, in the coastal area to the south of the A27, where tourism and food production are strong sectors, demand for business accommodation is low, due to its peripheral location and the underdeveloped office market. However, some B class space could

be accommodated in the designated Horticultural Development Areas (HDAs). The 2009 Chichester Employment Land Study suggested that there was a need to develop small enterprise centres, providing serviced space on flexible terms that are linked to local colleges and university. However, both the Employment Land Study and the District's Economic Strategy are currently being reviewed.

The Chichester Employment Land Review recommends that the following sites have the best potential to deliver B1 office space:

- Donnington Park, Stockbridge;
- Chichester Business Park, Tangmere; and
- Southern Gate, off Terminus Road, Chichester.

It identifies three sites may be better used for employment as part of a wider mix of uses, including non B-space uses:

- Stedham Mill, Stedham; (Mixed use);
- Graylingwell Hospital, Chichester; and
- Two sites on land between the A27 and Shopwhyke Road, Chichester.

4.3.4 Assets

Chichester's economic assets include:

- **Food production and Marine:** The quality of light and soil means that land based industries are prominent and in the coastal area there are a number of businesses linked to the marine sector. Public administration, health, education and advanced engineering are also local strengths;
- **Tourism, Culture and Retail:** The District and Chichester City, in particular, is a popular visitor destination, with an international reputation as a cultural centre and it has a rich independent retail offer that attracts shoppers from a wide catchment area;
- **Public Services:** As the administrative capital of West Sussex, Chichester has a significant public sector presence;
- **Education Provision:** There is a strong education presence in the District, including a large Further Education College and the University of Chichester;
- **Transport Connections:** Rail transport links to London, Portsmouth, Southampton, Gatwick Airport and Brighton & Hove are generally good and whilst road links eastbound suffer from congestion, they are much better heading west towards Portsmouth and Southampton;

4. The Districts and Boroughs

- **Workforce Skills:** Its residents generally well qualified with a much higher proportion of its population qualified to degree level; a significant number of home based businesses and is able to attract creative talent; and
- **Quality of Life:** Chichester is one of the most sought after places to live in the country. It has an outstanding natural environment, a rich history and well-recognised high quality cultural and recreational offer, making it an attractive place for creative people.

4.3.5 Challenges

Chichester's economic challenges include:

- **Housing Affordability:** Average employee earnings in the District are low and house prices are high, making it difficult to retain young talent locally;
- **Employment Space:** There is limited employment space for development and both the office and industrial property market are strong across the District as a whole, making it difficult to accommodate growing businesses;
- **Coastal Isolation:** The coastal parts of the District can seem quite isolated, making it difficult to attract the investment that is needed to create jobs in places like Selsey;

- **Tourism:** to increase the number of over night visitors with associated additional local spending and to increase the number of higher value visitors that are attracted to places like Rolls Royce, Northshore Yachts and events at Goodwood;
- **North-South Road Links:** North-south road transport infrastructure is weak and eastbound travel can be problematic due to high levels of congestion; and
- **Demographics:** There has been a significant increase in the post-working age population, which increases demand for health and social care services and reduces the supply of active labour for businesses in the District.



4. The Districts and Boroughs



4.4 Worthing

4.4.1 Geography and Demographics

Worthing has a population of just under 105,000 and covers an area of 3,369 hectares, including 7.5km of coastline. There are 7,000 more residents than there were 2001. Worthing is at the centre of Coastal West Sussex, located half way between Chichester and Brighton & Hove, enabling it to draw investment and talent from both the east and west and be the main driver of the Coastal West Sussex economy.

Historically, Worthing has had a reputation for being popular amongst older people, but this is changing. **Population growth over the past ten years has been fastest amongst the 16-24 years age group (+17%) and it was the only District in Coastal West Sussex to see an increase in its 0-15 years population.** Post working age (65+) residents now account for 21% of the total resident population, compared with 23% in 2001. Many of its non-urban areas in the north are now located in the South Downs National Park and the Borough has 26 conservation areas.

4.4.2 Economic Profile

In common with much of Coastal West Sussex Worthing has a relatively strong manufacturing base, although service sectors businesses are the greatest source of local employment. The Worthing Core

Strategy (2009) identifies the Boroughs key sectors as being:

- Business services - including software consultancy, supply and advertising;
- High technology manufacturing - including pharmaceuticals, aerospace and electronics; and
- Creative industries – including architectural and engineering activities and software and electronic publishing.

Worthing has a number of well-established larger businesses that are important to the Coastal West Sussex economy. These include B&W Speakers; Equiniti; Glaxo SmithKline; Fresh Egg; EDF Energy; Eurotherm, the Inland Revenue and the Environment Agency. Education; health & social care; retail; and tourism are also key components of Worthing's economy.

There used to be a strong financial services sector, but recent losses have changed this. There is now a much stronger focus on supporting the growth of indigenous small and medium sized businesses and attracting businesses looking to relocate out of neighbouring areas, such as Brighton & Hove. The seafront is an important feature of the district, with its pier, hotels and restaurants and a range of entertainments venues and facilities. It is a key focus

for development in the District.

4.4.3 Development Opportunities¹⁸

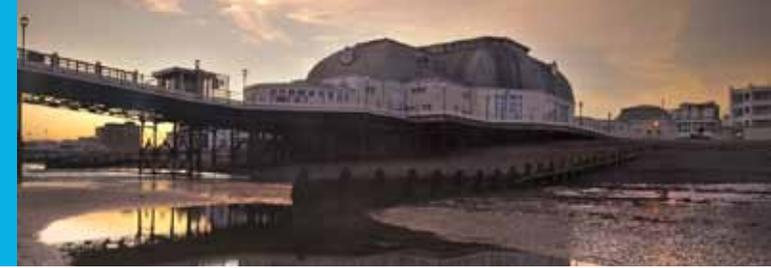
Worthing has ten key employment sites, which provide 70% of its total employment stock and which are mainly well occupied. Most of the office stock is in out of town locations, but there is limited serviced or managed workspace and no business incubator or innovation centre. Although there is only limited office development in the town centre, it does have some potential for high quality multi-let office buildings.

Demand for both the office and industrial markets is relatively strong and the Worthing Employment Land Review Economic Research Report suggests that there should be scope for renewed development activity when developer confidence returns.

Worthing's attractiveness has been demonstrated by the success of the new Yeoman's Gate development in attracting businesses, including some that have relocated out of Brighton & Hove. There is the potential to strengthen the office/commercial sector in Worthing if the business accommodation is of the right quality to attract inward investors.

The Borough Council's Core Strategy has identified a number of Areas of Change that are the focus of its development activities, which include:

4. The Districts and Boroughs



- **Aquarena:** leisure, residential, cultural and commercial, which could include retail and a hotel;
- **Marine Parade:** Stagecoach Site: residential, retail and cafes to support the area as a cultural quarter;
- **Marine Parade:** Grafton Site: entertainment and leisure; retail and residential;
- **Union Place South:** retail; high density residential; and culture and leisure;
- **Teville Gate:** modern leisure, retail and residential development;
- **Newland Street Superstore Site:** residential and office development;
- **Martletts Way:** employment and residential;
- **Health and Social Care:** The strong health sector and the relatively large old population, makes Worthing a good place for businesses in the health and social care sector;
- **Northbrook College, Durrington Campus:** residential and employment; and
- **Decoy Farm:** small industrial units, larger warehousing, storage and general industrial.

4.4.4 Assets

Worthing's economic assets include:

- **Demographic Change:** The demographic profile of the District is changing, with an increase in the number of younger working age residents
Education Provision: Worthing is a significant

centre of learning, with a strong FE college, which is good attracting design students from elsewhere; a Sixth Form College and numerous language schools;

- **Coastal Connectivity:** It is centrally located in Coastal West Sussex, so it is well-positioned to attract talent and investment from neighbouring areas like Brighton & Hove and Chichester. It also has good east-west rail links and it has a direct rail link to Gatwick Airport and London;
- **Advanced Engineering:** It has notable advanced engineering and manufacturing businesses that have shown some resilience in recent years; and
- **Tourism:** Worthing is an attractive location for residents and visitors, with good access to the South Downs National Park and a varied coastline.

4.4.5 Challenges

Worthing's economic challenges include:

- **Branding:** Worthing is sometimes perceived to be a place for older people, despite its rapidly changing demographic profile;
- **Road Links:** Road transport and traffic congestion continue to be a concern for businesses and a potential barrier to inward investment;
- **Average Earnings:** Average earnings are low, reflecting a high concentration for employment in relatively low value added sectors;

- **Inward Investment:** Worthing has been unable to retain its large financial services businesses or to attract adequate replacements; and
- **Business Accommodation:** Serviced or managed workspace within the town is limited; there is no business incubator or innovation centre and there is a lack of Grade A office accommodation in the town centre¹⁹. Development opportunities for light industrial employment space across Worthing is very limited and the size and configuration of its retail units is also considered to constrain the town's growth as a retail centre.



¹⁹ Economic Research – Employment Land, Knight Frank, on behalf of Worthing Borough Council (2009)

5. Themes, Priorities and Actions

This section considers the main challenges, priorities and actions for the Coastal West Sussex economy, drawing on the analysis set out in the previous sections. Publicly available data is insufficient on its own to capture these challenges, not least because most data is not available at below District level (and even at this level it is often not that reliable), so these have been developed largely on the basis of consultation and a review of related reports, strategies and plans.

The Coastal West Sussex Partnership is well placed to add significant value to local economic development interventions, acting as a conduit between the Coast to Capital LEP, West Sussex County Council and the Districts and Boroughs and their partners; co-ordinating joined-up interventions across local authority boundaries; acting as a strong and informed advocate to support business growth and development across the West Sussex coast.

There are three broad themes, around which the priorities and actions have been developed: People, Place and Promotion. Local authorities, colleges, universities and other public and private sector organisations will be the main delivery bodies for many of the actions. However, the Coastal West

Sussex Partnership has a particularly strong role around:

- Co-ordinating; Advocating, influencing, lobbying, and promoting;
- Intelligence gathering and communicating internally and externally; and
- Identifying and co-ordinating external funding applications.

There are five priorities under three broad themes. All the priorities in this document support the West Sussex Economic Strategy theme, “Support the creation of a range of jobs that enable people to participate in the labour market in a way that best reflects their needs at different life stages” and its supporting strategic outcome: “West Sussex will have a high level of employment with a range of jobs that enable residents in all parts of the county to afford to live locally”. However, specific priorities in this document are linked to specific priorities and outcomes in the West Sussex Economic Strategy.

Theme A: People

- I: Understand and Strengthen Business Supply Chains and Networks
- II: Match Skills to Business Needs

Theme B: Place

- III: Secure Investment to Develop Commercial Property and Support the Regeneration of Town Centres
- IV: Improve Transport and Communications Infrastructure

Theme C: Promotion

- V: Improve Coastal West Sussex’s Attractiveness to Investors

5. Themes, Priorities and Actions



The Coastal West Sussex Partnership is well placed to add significant value to local economic development interventions, acting as a conduit between the Coast to Capital LEP, West Sussex County Council and the Districts and Boroughs and their partners

5. Themes, Priorities and Actions

Theme A: People

I: Understand and Strengthen Business Supply Chains and Networks

Rationale

Many of Coastal West Sussex's jobs are relatively low paying, limiting the amount of disposable income that is spent on local goods and services. The lack of good quality jobs and relatively high house prices encourages high levels of out-commuting and makes it difficult to retain talent locally. High paying employment sectors are not necessarily the ones that provide a high volume of jobs directly. However, they can generate wealth and with strong supply chains, they can support employment growth indirectly.

Coastal West Sussex needs to be realistic about what it can focus on. All areas will have a range of public and private sector support services that serve local populations (education, health and retail services, for example). These will all need a plentiful supply of labour in the foreseeable future. However, **Coastal West Sussex has distinctive strengths in activities related to Advanced Engineering; Port and Marine related activities; Horticulture; Tourism; Social Care; and Creative Industries and Digital Media.** Many local businesses will already be engaged in sector or spatially focused networks and organisations, but the absence of a national business

support service is likely to increase the need for peer to peer support networks.

West Sussex Economic Strategy Links

Strategic Priority:

Understand and respond to the needs of established businesses and support people to start and grow successful enterprises.

Strategic Outcome:

Business density, start up and survival rates remain consistently above the national average and the entrepreneurship that is evident in the county's rural districts is reflected across the county.

What Needs to Happen

- Improve knowledge and add value to local business networks and support services, so that the benefits of engagement can be demonstrated and promoted;
- Support and maintain business networks to improve local supply chain links, embed stronger 'soft' business relationships, and to develop a stronger business voice within the Coastal West Sussex;
- Encourage businesses, particularly in deprived areas, to broaden their markets;
- Promote and develop international trade amongst a wider range of businesses;

- Improve understanding of local supply chain linkages, so that there can be more targeted action to promote local sourcing; and
- Support local businesses to compete for public service contracts.

The Role of the Coastal West Sussex Partnership

- Gather and share knowledge and intelligence about local and specialist business networks and support services;
- Identify business support needs and gaps particularly for growing SMEs, influencing or co-ordinating activities to address these;
- Engage with and, where required, lobbying local authorities and other public bodies on behalf of business networks;
- Promote and support local sourcing initiatives to businesses;
- Lobby and influence local authority and other public sector organisations to procure goods and services locally;
- Support local businesses to bid for public service contracts;
- Identify and co-ordinate external funding bids for business support and network development projects; and
- Influence funding and spending decisions of partners so that they benefit the local economy.

5. Themes, Priorities and Actions

Success Measures

- Local authorities have a positive approach to local sourcing that is widely recognised by local businesses;
- The Coastal West Sussex Partnership is recognised by businesses as a key point of contact for providing support to bid for public service contracts;
- The availability of business support services is widely recognised and identified gaps are addressed; and
- Coastal West Sussex has a network of robust and sustainable business support networks that are valued by local businesses.



Theme A: People

II. Match Skills to Business Needs

Rationale

Skill levels remain low in many parts of Coastal West Sussex. This is a characteristic feature of many economies that have a high proportion of lower level jobs, where the demand for high skills is weak. This means that it can be difficult to attract businesses that provide higher skilled jobs and that when this does happen, local people may not be in a position to compete for them. This is a vicious circle because it can then be difficult to retain skilled people, who have to move out of the area to find the higher skilled jobs that they are looking for. ***Ultimately, the Coastal West Sussex economy will need to raise the quality of jobs and the skills levels of its local population if it is to broaden and strengthen its economic base.*** Coastal West Sussex now has a strong university presence and active and engaged Further Education colleges to support skills development both within and outside the workplace.

West Sussex Economic Strategy Links

Strategic Priority:

Support local people to acquire the skills that the economy needs.

Strategic Outcome:

West Sussex will have a well-respected programme

of enterprise education in all its schools, colleges and universities and a co-ordinated approach to apprenticeships and the workforce development that supports local business needs.

What Needs to Happen

- Develop an on-going, high profile dialogue between education providers and business;
- Improve the range of quality of apprenticeships;
- Embed enterprise education in the curriculum;
- Support businesses to influence and contribute to the curriculum;
- Develop flexible learning routes through to higher levels of attainment;
- Provide accurate labour market intelligence about the opportunities that are available locally; and
- Make good use of successful alumni to promote the benefits of learning.

The Role of the Coastal West Sussex Partnership

- Facilitate and broker links between learning providers and local businesses to work together to address common issues and address local skill needs;
- Promote apprenticeships and encourage businesses to invest in work-related training;
- Advise learning providers on local employer skills needs;

5. Themes, Priorities and Actions

- Contribute to careers education and education-business partnership activities;
- Work with learning providers and other public bodies to influence the curriculum;
- Champion the Coastal West Sussex enterprise agenda and contribute to the Coast to Capital enterprise agenda; and
- Identify and co-ordinate opportunities to bid for external funding to support skill development and enterprise education.

Success Measures

- The Coastal West Sussex Partnership is recognised by learning providers and local businesses as a valued resource in providing a link between education providers and business;
- The Coastal West Sussex Partnership has contributed to, led on and/or co-ordinated applications for external funds to deliver skill development projects;
- Local businesses have a good understanding of the curriculum and believe that they can actively influence how and what is delivered locally; and
- The Coastal West Sussex Partnership is recognised as having a key role in promoting apprenticeships and work related training opportunities to local employers.

Theme B: Place

III: Secure Investment to Develop Commercial Property and Support the Regeneration of Town Centres

Rationale

Many parts of Coastal West Sussex are caught in a vicious circle, making it difficult to diversify their economic base. Much of the business accommodation is of mixed quality, rent levels are low (but affordable for businesses that produce low value goods and services) and there is little grade ‘A’ commercial office accommodation. This contributes to low average earnings, reflects the strong reliance on relatively low level (and often locally servicing) service sector employment, public services and low-intermediate level manufacturing all making it difficult to encourage speculative investor development or to merit significant investment in upgrading the existing business accommodation stock. Furthermore, whilst its town centres support their local populations, many struggle to compete with larger retail centres in neighbouring areas.

There is a need to try to stimulate demand by making development sites and regeneration opportunities in the area’s town centres more attractive and promoting them better to businesses that are struggling to find suitable accommodation in

neighbouring areas. Local Employment Land Reviews suggest that the main gap in the market is for small office units that would support start-ups and growing small businesses, and for incubator space, perhaps linked to the Universities and/or other education providers. Commercial agents also report that there is relatively high demand for good quality, small, flexible industrial units of around 2,500 – 5,000 sq ft,

Structures have been established that will encourage a more collaborative approach to land-use planning across the four districts and boroughs. *The Coastal West Sussex Strategic Planning Board will provide a clear strategic planning vision to integrate spatial planning and infrastructure investment across the Coastal West Sussex area.*

West Sussex Economic Strategy Links

Strategic Priority:

Adapt and respond to new funding conditions and opportunities to ensure that West Sussex secures investment to support its economic development priorities.

Strategic Outcome:

West Sussex will have developed a range of funding models and partnerships to ensure that its economic development.

5. Themes, Priorities and Actions

Strategic Priority:

Make best use of land and property to support a robust and sustainable economy.

Strategic Outcome:

Priority brownfield sites are appropriately developed and existing sites are improved to provide new business spaces, jobs and homes that communities need investments lever optimum additional funding and deliver tangible returns on investment.

What Needs to Happen

- Develop a flexible approach to land-use that enables commercial developments to be cross-subsidised with mixed-use developments comprising retail, housing and other value generator uses;
- Raise the awareness of investment opportunities to developers and commercial agents.
- Ensure that Worthing and Shoreham, in particular, benefit from the overspill from Brighton & Hove;
- Develop a thorough understanding of the potential accommodation needs of growing businesses relocating across Coastal West Sussex; and
- Investigate new financial incentives to provide low cost flexible rents in good quality premises in less favoured business locations.

The Role of the Coastal West Sussex Partnership

- Work with local planning authorities and the private sector to create a business-friendly planning environment;
- Work with local authorities and commercial agents to develop and communicate a clearer understanding of actual and latent demand;
- Co-ordinate local authorities and work with developers and investors to identify new delivery mechanisms, funding tools and financial incentives to upgrade premises and develop sites and infrastructure;
- Act as the main conduit between Coastal West Sussex and neighbouring Area Partnerships, particularly Brighton & Hove, to ensure that their expanding business and potential investors consider Coastal West Sussex as a viable relocation option;
- Act as the 'intelligence hub' for businesses looking to move into or within Coastal West Sussex and for commercial agents looking to let property;
- Lobby local and central government for higher speed broadband and ICT infrastructure improvements, particularly in areas that have locational disadvantages; and
- Identify and co-ordinate external funding bids to support capital development projects.

Success Measures

- The Coastal West Sussex Partnership is recognised by businesses and partners as a key source for information and intelligence on the availability of premises across the area;
- Local authorities and commercial agents have a better understanding of the availability and characteristics of premises in the Coastal West Sussex area; and
- Local authorities and developers successfully identify financial incentives to support commercial development.



5. Themes, Priorities and Actions

Theme B: Place

IV. Improve Transport and Communications Infrastructure

Rationale

Parts of Coastal West Sussex are in very accessible locations. East-west rail links between Brighton & Hove and Portsmouth are good and there are direct lines to London and Gatwick Airport from most of the area's urban areas. However, there are on-going business concerns about the A27 and A259 roads, particularly around Worthing, Arundel and Chichester. Furthermore some of Coastal West Sussex's main urban centres are not even on the A27 and are perceived as being relatively inaccessible. There is nothing that can be done about its coastal location and major investment in the road infrastructure is unlikely in the short to medium term. However, **major road infrastructure issues should remain an important lobbying issue for the Coastal West Sussex Partnerships and other organisations in West Sussex.**

The difficult access issues in some parts means that the ICT/Broadband infrastructure needs to be good enough to attract and retain businesses that are less transport dependent and traffic congestion can be eased by encouraging businesses to adopt flexible working practices and encouraging them to

develop company travel plans that support the use of sustainable transport.

West Sussex Economic Strategy Links

Strategic Priority:

Deliver the transport and communications infrastructure that businesses and residents need.

Strategic Outcome:

Improved level of business and resident satisfaction with transport and communications infrastructure.

What Needs to Happen

- Strengthen traffic management and invest in minor road improvements to shorten journey times;
- Develop fast and reliable broadband connectivity;
- Encourage businesses to enable employees to work more flexibly and to adopt travel plans;
- Provide reliable and affordable public transport to enable people to travel to and from work; and
- Ensure that new housing and employment developments are mutually accessible.

The Role of the Coastal West Sussex Partnership

- Continue to support wider lobbying activities for improvements to the A27 and other strategic routes;
- Lobby local authorities and other public sector

organisations on behalf of businesses on specific transport issues they identify;

- Contribute to the roll-out of broadband across Coastal West Sussex and report on any gaps and connectivity problems;
- Promote travel plans and flexible working practices to local employers as a means of combatting congestion;
- Lobby for public transport improvements on behalf of local businesses.

Success Measures

- The Coastal West Sussex Partnership recognised as providing a key business voice on transport and related issues in Coastal West Sussex;
- The Coastal West Sussex Partnership is recognised by businesses as an important conduit into the West Sussex Council Transport department and other transport providers;
- Travel Plans and flexible working are widely recognized and used by employers as a means of reducing traffic congestion and improving access to work; and
- Broadband/ICT infrastructure in Coastal West Sussex meets business needs and is of sufficient quality to attract new investors.

5. Themes, Priorities and Actions

Theme C: Promotion

V: Improve Coastal West Sussex's Attractiveness to Businesses and Investors

Rationale

Coastal West Sussex is not yet considered as a primary location for businesses and investors. Its coastal location, access to major markets and, perhaps its image contribute to this. This is considered to be the case even in Worthing, the largest commercial centre in the area. It is not entirely clear whether this is because its intrinsic qualities are not sufficiently attractive to businesses, or because it has not been promoted well enough to the right type of investors.

There have been some notable inward investment successes in the recent past, including Rolls Royce in Chichester and more recently Parker Steel at Shoreham Port. Coastal West Sussex has a number of significant international businesses that demonstrate that it is attractive to some businesses; has had success in growing and retaining indigenous businesses; and is an alternative location for some business that Brighton & Hove cannot accommodate.

Individual authorities only have limited resources for inward investment but working collectively could have a more significant impact.

West Sussex Economic Strategy Links

Strategic Link:

Promote West Sussex as a First Class Business Destination.

Outcome:

A clearly articulated and co-ordinated approach to inward investment activity that meets the needs of potential investors.

Success Indicators:

An established intelligence sharing and investment enquiry handling protocol between partners;
An increase in the number of investment enquiries and an increase in the proportion of lead conversions, as measured by baseline intelligence gathered at the start of the strategy period;
5,000 new jobs created through new investments.

What Needs to Happen

- Coastal West Sussex needs a coherent brand that can be articulated externally and understood internally. This could mean placing Worthing as the central focal point of Coastal West Sussex and building on its tourism and retail strengths;
- Develop a marketing strategy that focuses on its key assets and strengths from a business perspective;

- Identify key target markets that are likely to see Coastal West Sussex (or parts thereof) as a desirable location. These may include:
 - Businesses that are looking to relocate out of Brighton & Hove
 - Businesses that are finding it difficult to expand within or locate locally but wish to remain in Coastal West Sussex;
 - Businesses that are being encouraged to relocate out of Shoreham Port as it consolidates its activities around Port-related activities
 - Businesses that have supply chain links with Coastal West Sussex companies, including those engaged in horticulture, advanced engineering, marine activities and social care
- Invest in public realm improvements and revitalising the area's town centres;
- Improve and promote the area's cultural and recreational facilities; and
- Promote key strategic sites at Worthing, Shoreham Harbour, Shoreham Airport, Littlehampton and Enterprise@BognorRegis to investors, developers and commercial agents.

5. Themes, Priorities and Actions

The Role of the Coastal West Sussex Partnership

- Support and help to co-ordinate inward investment and relocation activities, including developing materials and engagement tools, site promotion; intelligence gathering and enquiry handling;
- Work with neighbouring authorities to identify inward investment opportunities and to retain expanding businesses;
- Act as a business advocate to lobby local authorities and other partners for identified improvements in the business operating environment;
- Recruit a network of Coastal West Sussex business ambassadors and support them to promote the area's assets to commercial agents, developers and other investors; and
- Identify and co-ordinate external funding bids to support inward investment activities.

Success Measures

- An inward investment protocol so that there is a well-established enquiry handling service and response mechanism in place;
- A network of Business Ambassadors, with clear roles, is in place to promote West Sussex as a business location;

- Adaptable inward investment materials that enable Coastal West Sussex Board Members to provide a consistent approach to promoting the area's assets internally and externally;
- The Coastal West Sussex Partnership is recognised as the main conduit for inward investment intelligence and enquiries for local authorities; developers; commercial agents and potential investors; and
- The Coastal West Sussex Partnership is recognised as having a central role in contributing to the Coast to Capital inward investment and internationalisation targets.



6. Management, Monitoring and Review

Management

The Coastal West Sussex Partnership Board will have overall responsibility for the successful delivery of the actions within this document. The Coastal West Sussex Board will prioritise actions and delegate lead oversight responsibility to individual board members, who will work closely with the Director of the Coastal West Sussex Partnership and other local partners to refine and support the delivery of the actions.

Monitoring and Review

Day to day management will be the responsibility of the Director of the Coastal West Sussex Partnership, who will report on progress to meetings of the Coastal West Sussex Partnership Board. Many of the strategic indicators that are used to measure economic development outcomes are not reliable at local level, because they are survey based. Furthermore, it is often difficult to attribute changes in local economic circumstances to specific interventions or to individual organisations and partnerships. Strong external factors can have a greater bearing on performance against numerical indicators.

Impact monitoring for the Coastal West Sussex will, therefore, be based on a self and/or peer evaluation methodology for each priority action, using both qualitative and quantitative measures, as appropriate. The detail of the evaluation framework is likely to be different for each action, but should follow the following logic chain.

Baseline:

Establish why the intervention is needed through data evidence and a consultation process.

Inputs:

Establish the resources, including officer time and external support that will be allocated to the action over what period

Activities (Outputs):

Record the activities that will be undertaken, including the number of meetings or events attended, for example.

Outcomes:

Establish the impact that the activities (outputs) have had by revisiting the data evidence and consultation process that informed the baseline.

The outcomes should be considered against what is thought likely to have happened without the specific intervention of the Coastal West Sussex Partnership (the counterfactual). Outline actions (What Needs to Happen) and the suggested Outcomes (Success Measures) are set out under each of the identified priorities in Section 5 of this document.



Annex 1: Data Tables

A1: Age Profile ('000s)

	All ages		0-15		16-24		25-49		50-64		16-64		65-79		80+		65+	
	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%
Coastal West Sussex	429.1		713.2	17	41.0	10	130.0	30	84.7	20	255.7	60	69.4	16	32.9	8	102.3	24
Adur	61.2		10.5	17	5.8	9	19.5	32	12.0	20	37.3	61	9.4	15	4.1	7	13.5	22
Arun	149.5		23.4	16	13.7	9	43.2	29	29.9	20	86.8	58	26.9	18	12.5	8	39.4	26
Chichester	113.8		18.7	16	11.4	10	32.2	28	23.5	21	67.1	59	19.2	17	8.6	8	27.8	24
England	53,012.5		10,040.1	19	6,267.5	12	18,474.9	35	9,569.4	18	34,311.8	65	6,221.6	12	2,438.9	5	8,660.5	16
Coast to Capital LEP	1,922.5		359.1	19	208.8	11	667.1	35	350.2	18	1,226.1	64	232.7	12	104.6	5	337.3	18
West Sussex	806.9		144.6	18	77.9	10	261.3	32	156.5	19	495.7	61	113.9	14	52.6	7	166.5	21

Source Census 2011

A2: Age Profile: Change 2001-2011

	All ages		0-15		16-24		25-49		50-64		16-64		65-79		80+		65+	
	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%
Coastal West Sussex	24700	6.1	-600	-0.9	5600	15.8	5800	4.7	8400	11.0	19800	8.4	4000	6.2	1700	5.5	5700	6.0
Adur	1600	2.7	-800	-6.9	500	9.7	800	4.4	500	4.7	1900	5.3	400	4.0	200	6.2	600	4.7
Arun	8700	6.2	-600	-2.5	2100	17.8	1600	3.9	2900	10.7	6600	8.2	2200	8.9	700	5.6	2900	7.9
Chichester	7300	6.9	-200	-1.2	1500	15.5	400	1.2	2200	10.1	4100	6.5	1900	10.8	1400	19.8	3300	13.4
Worthing	7000	7.2	1000	5.4	1500	17.3	3000	9.4	2800	16.8	7300	12.7	-400	-2.8	-600	-7.3	-1000	-4.5
England	3873700	7.9	155700	1.6	888700	16.5	967200	5.5	1009400	11.8	2865300	9.1	473600	8.2	378900	18.4	852500	10.9
Coast to Capital LEP	145100	8.2	151200	4.4	32900	18.7	38100	6.1	38800	12.5	109800	9.8	10100	4.5	10000	10.6	20200	6.4
West Sussex	53300	7.1	900	0.6	8800	12.8	11200	4.5	18600	13.4	38600	8.5	7600	7.1	6100	13.2	13700	8.9

Source: 2001 and 2011 Census. Note: Figures rounded to nearest 100

Annex 1: Data Tables

A3: Main Employment Sectors

The table below shows the sectors (2 digit SIC 2007) in which there are more than 2,000 people in employment in Coastal West Sussex. Many sectors that employ large numbers of people are the same in most local economies. Local concentrations, as measured by Location Quotients (LQ) are shown in A4 below.

Sector	Count	%
47 : Retail trade, except of motor vehicles and motorcycles	20600	12.2
86 : Human health activities	15200	9.0
84 : Public administration and defence; compulsory social security	13900	8.2
85 : Education	13600	8.0
56 : Food and beverage service activities	11700	6.9
87 : Residential care activities	7700	4.6
88 : Social work activities without accommodation	5800	3.4
46 : Wholesale trade, except of motor vehicles and motorcycles	5800	3.4
78 : Employment activities	4900	2.9
43 : Specialised construction activities	4500	2.7
68 : Real estate activities	3500	2.1
45 : Wholesale and retail trade and repair of motor vehicles and motorcycles	3200	1.9
55 : Accommodation	3200	1.9
70 : Activities of head offices; management consultancy activities	3200	1.9
81 : Services to buildings and landscape activities	3000	1.8
62 : Computer programming, consultancy and related activities	2700	1.6
69 : Legal and accounting activities	2700	1.6
93 : Sports activities and amusement and recreation activities	2400	1.4
41 : Construction of buildings	2300	1.4
66 : Activities auxiliary to financial services and insurance activities	2300	1.4
25 : Manufacture of fabricated metal products, except machinery and equipment	2200	1.3
71 : Architectural and engineering activities; technical testing and analysis	2100	1.3
96 : Other personal service activities	2100	1.2

Source: BRES 2010 via NOMISWEB

Annex 1: Data Tables

A4: Employment: Local Concentrations

The table below shows all the sectors where there is a greater concentration of employment in Coastal West Sussex than in England as a whole. These are not always sectors that provide a large number of local jobs.

Sector	Number	%	LQ
03 : Fishing and aquaculture	<100	0.0	2.3
26 : Manufacture of computer, electronic and optical products	1600	1.0	2.1
87 : Residential care activities	7700	4.6	1.9
91 : Libraries, archives, museums and other cultural activities	1100	0.7	1.8
84 : Public administration and defence; compulsory social security	13900	8.2	1.6
75 : Veterinary activities	400	0.2	1.5
55 : Accommodation	3200	1.9	1.5
58 : Publishing activities	1300	0.8	1.4
29 : Manufacture of motor vehicles, trailers and semi-trailers	1100	0.7	1.4
32 : Other manufacturing	765	0.5	1.4
56 : Food and beverage service activities	11700	6.9	1.3
86 : Human health activities	15200	9.0	1.3
68 : Real estate activities	3500	2.1	1.2
25 : Manufacture of fabricated metal products, except machinery and equipment	2100	1.3	1.2
31 : Manufacture of furniture	500	0.3	1.2
47 : Retail trade, except of motor vehicles and motorcycles	20700	12.2	1.2
27 : Manufacture of electrical equipment	600	0.4	1.2
13 : Manufacture of textiles	400	0.3	1.2

Source BRES (2010) via NOMISWEB

Annex 1: Data Tables

A5: Main Job Losses 2008-2010

The table below shows the sectors (2 digit SIC 2007) in which there are more than 2,000 people in employment in Coastal West Sussex. Many sectors that employ large numbers of people are the same in most local economies. Local concentrations, as measured by Location Quotients (LQ) are shown in A4 below.

Sector	Count
87 : Residential care activities	-1600
82 : Office administrative, office support and other business support activities	-1300
64 : Financial service activities, except insurance and pension funding	-1200
85 : Education	-1100
80 : Security and investigation activities	-900
96 : Other personal service activities	-800
93 : Sports activities and amusement and recreation activities	-700
45 : Wholesale and retail trade and repair of motor vehicles and motorcycles	-600
74 : Other professional, scientific and technical activities	-600
43 : Specialised construction activities	-500
33 : Repair and installation of machinery and equipment	-300
77 : Rental and leasing activities	-300
71 : Architectural and engineering activities; technical testing and analysis	-300
75 : Veterinary activities	-300
26 : Manufacture of computer, electronic and optical products	-200
42 : Civil engineering	-200
23 : Manufacture of other non-metallic mineral products	-200
31 : Manufacture of furniture	-200
49 : Land transport and transport via pipelines	-200

Source: BRES 2008 and 2010 via NOMISWEB

Note: All figures have been rounded to the nearest 100

Annex 1: Data Tables

A6: Main Job Gains 2008-2010

The table below shows the sectors (2 Digit 2007 SIC) where there were more than 200 job gains between 2008 and 2010.

Sector	Job Gains
84 : Public administration and defence; compulsory social security	6300
56 : Food and beverage service activities	1800
86 : Human health activities	1600
78 : Employment activities	1300
55 : Accommodation	1300
88 : Social work activities without accommodation	900
68 : Real estate activities	800
66 : Activities auxiliary to financial services and insurance activities	615
81 : Services to buildings and landscape activities	600
46 : Wholesale trade, except of motor vehicles and motorcycles	600
41 : Construction of buildings	600
25 : Manufacture of fabricated metal products, except machinery and equipment	400
91 : Libraries, archives, museums and other cultural activities	300
69 : Legal and accounting activities	300
28 : Manufacture of machinery and equipment n.e.c.	300
29 : Manufacture of motor vehicles, trailers and semi-trailers	200

Annex 1: Data Tables

A7: Private Sector Jobs

There are estimated to be around 147,500 private sector jobs in Coastal West Sussex. This is considerably less than there were in 2007/8 (159,000). Most of the losses have been in the Adur and Arun Districts. Three quarters of all the jobs in the Coast to Capital area are private sector jobs. This is also well below the proportion of jobs that were in the private sector in 2007/08 (80.6%) *Note: the margins of error for these figures are quite wide at district level, so should be treated with some caution.*

	Private Sector Jobs		Change 2007/8-2011/12	
	Count	% of all Jobs	Count	%
Coastal West Sussex	147,500	75.1	-11,400	-7.2
Adur	20,800	73.1	-5,000	-19.4
Arun	51,900	80.5	-5,500	-9.6
Chichester	40,000	77.1	200	0.5
Worthing	34,800	67.5	-1,100	-3.1
West Sussex	306,100	78.9	-4,700	-1.5
Coast to Capital LEP	706,100	77.4	-5,600	-0.8
England	18,658,100	76.8	-201,300	-1.1

Annex 1: Data Tables

A8: Business Density (per 1,000 16-64 year old residents)

The stock of businesses in Coastal West Sussex has remained fairly constant since 2004. In 2010 there were just over 17,400 businesses compared with just over 17,600 eight years earlier. However, the increase in the working age population over the period has meant that business density (as measured by active businesses per 1,000 16-64 year old residents) fell from 73.0 to 69.0 over the period. This is broadly in line with the Coast to Capital LEP average and well above the average for England.

Chichester has an exceptionally high business density, but in the other districts within the Coastal West Sussex area, business density is much more in line with the England average.

	2004	2005	2006	2007	2008	2009	2010
Coastal West Sussex	73.0	71.5	69.2	70.1	70.4	70.7	69.0
Adur	59.0	57.9	58.3	58.8	59.5	59.2	59.3
Arun	66.8	65.3	62.5	61.4	63.1	62.8	60.3
Chichester	97.3	95.5	92.1	97.0	94.3	95.1	94.0
Worthing	63.9	62.4	60.6	61.4	61.8	62.5	60.0
West Sussex	75.9	74.8	70.9	71.4	71.8	71.7	69.9
Coast to Capital LEP	71.5	70.8	69.1	69.8	70.2	70.4	69.4
England	58.8	58.8	58.8	60.3	61.0	61.2	59.7

Source: Business Demography (2010) and Annual Population Survey 2004-2010)

Annex 1: Data Tables

A9: Business Start Up Rates (per 10,000 16-64 year old residents)

The number of new businesses forming in Coastal West Sussex has fallen sharply in recent years. In 2004, just over 2,100 businesses were formed in the Coastal West Sussex area, but by 2010 this had fallen to just under 1,600. This is a more significant fall in the rate of business formation than in England as a whole. The most significant reductions in business formation occurred in Arun (- 31%) and in Worthing (-29%), although in the case of Worthing, this appears to have been due to a significant fall in 2010.

	2004	2005	2006	2007	2008	2009	2010
Coastal West Sussex	87.3	77.7	71.3	70.2	65.8	64.6	62.8
Adur	76.1	62.5	69.7	65.5	55.4	53.0	58.4
Arun	79.0	70.3	60.2	61.4	59.4	54.1	53.2
Chichester	107.6	101.2	86.4	93.4	84.0	84.6	84.5
Worthing	83.8	71.8	71.5	61.5	61.6	64.9	55.6
West Sussex	90.2	78.1	72.8	74.3	68.6	66.9	66.0
Coast to Capital LEP	90.7	81.6	76.9	78.7	74.5	70.0	72.4
England	77.5	74.5	68.8	74.8	71.2	62.7	61.9

Source: Business Demography (2010) and Annual Population Survey 2004-2010)

Annex 1: Data Tables

A10: Three and Five Year Survival Rates (Businesses Born in 2005)

Three-year and five year business survival rates for Coastal West Sussex businesses that were formed in 2005 are similar are above those of the Coast to Capital LEP and England as whole. Business survival is particularly high in Adur, but lower in Worthing. This may partly reflect the different structures of their economies. There tends to be more churn in strongly service sector economies and those in urban areas, than in those that have a stronger industrial base and which are in rural areas. A high turnover of businesses does not necessarily reflect an under-performing economy and a low turnover may not necessarily reflect a high performing one.

	Births	3 Year Survival	3 Year per cent	5 Year Survival	5 Year per cent
Coastal West Sussex	1,895	1,295	68.3	925	48.8
Adur	225	165	72.8	120	54.5
Arun	585	410	70.1	280	48.0
Chichester	655	445	67.9	325	49.6
Worthing	430	275	64.3	200	45.9
West Sussex County	3,645	2,525	69.4	1,800	49.4
Coast to Capital LEP	15,375	10,385	67.5	7,415	48.2
England	241,410	155,900	64.8	106,455	44.1

Annex 1: Data Tables

A11: Median Earnings for All Employees (2010)

Median earnings for all employees are not available for Coastal West Sussex as a whole. Figures for the Districts are available, but they are subject to wide margins of error, so they should be treated with caution. Based on data that is available, workplace earnings across Coastal West Sussex are below those of West Sussex and England as a whole. They are particularly low in Arun. In both Worthing and Arun employees earn considerably less than local residents.

	Adur	Arun	Chichester	Worthing	West Sussex	England
Workplace	£17,544	£16,231	£19,393	£19,255	£20,479	£21,555
Residents	£17,509	£19,488	£19,297	£22,023	£21,306	£21,564
Difference	+£35	-£3,257	+£96	-£2,768	-£827	-£9

Source: Annual Survey of Hours and Earnings (2010) via NOMISWEB

Annex 1: Data Tables

A12: % Residents Qualifications

Just over a quarter of the Coastal West Sussex area's 16-64 year old resident population has a degree or equivalent qualification. This is very similar to the average for West Sussex and marginally higher than the national average. Chichester has an exceptionally high proportion of well-qualified working age residents, but in the other Districts in Coastal West Sussex, the proportion of residents with higher level qualifications is well below the England, Coast to Capital LEP and county averages. A high proportion of Adur's working age residents has no formal qualifications, but the proportion of unqualified working age residents in Worthing is very low.

	% with degree or equivalent and above - aged 16-64		% with no qualifications - aged 16-64	
	Count	%	Count	%
Coastal West Sussex	63,200	25.3	19,300	7.7
Adur	8,200	21.7	4,800	12.7
Arun	17,000	20.2	8,300	9.8
Chichester	25,100	38.4	4,800	7.3
Worthing	12,900	20.7	1,500	2.4
West Sussex	123,500	25.8	33,200	6.9
Coast to Capital LEP	345,900	29.7	81,400	7.0
England	8,196,200	24.8	3,473,800	10.5

Source: Annual Population Survey Jan-Dec 2010

Annex 1: Data Tables

A13: Employment Rates

The employment rate in Coastal West Sussex and each of its constituent districts is higher than the England average. Only in Arun is the employment rate below the Coast to Capital LEP average. However, the employment rate has significantly in recent years in Adur and Worthing, but it has remained high in Chichester and Worthing.

	2011/12	Change 20078/-2011/12
	%	%
Coastal West Sussex	74.9	-2.1
Adur	75.2	-6.1
Arun	72.2	-7.9
Chichester	74.5	2.3
Worthing	78.9	3.8
West Sussex	77.4	-0.4
Coast to Capital LEP	74.6	-2.0
England	70.3	-2.4

Source: Annual Populations Survey via NOMISWEB