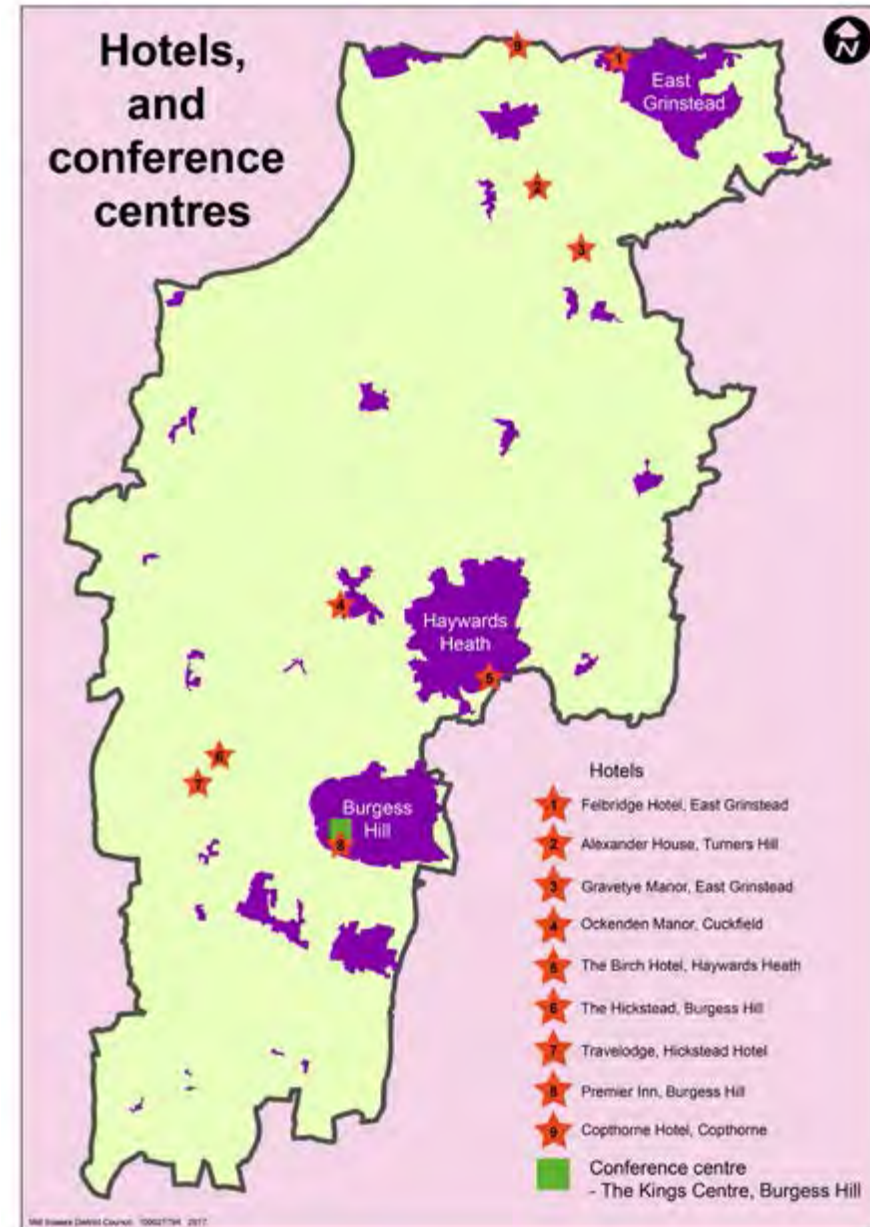




Hotels and Conference Centres

Our contacts with the local business community suggest an adequate level of provision of conference and hotel accommodation in the more rural parts of the District, but a lack of such facilities to meet business needs in the three towns. The shortage of local hotel accommodation particularly applies to companies who have a high volume of visitors, such as flight simulation companies who train up to 150 pilots per week on four week courses.

The town centre redevelopment scheme in Burgess Hill includes a 65 bed Travelodge. A 78 bed hotel has just been granted planning permission in Haywards Heath, and another Travelodge is being delivered in East Grinstead. Once opened these new facilities will go some way to meeting local demand, although there is still considerable demand for mid-range hotel facilities along with conference facilities.



Mid Sussex District's Council Property Portfolio

The Council's property portfolio contributes significantly to the economic health of the local economy in a number of ways:-

- In the town centres the Council uses its property interests to encourage development of the retail centres and to facilitate economic investment;
- Leasing and disposal of commercial property to generate revenue income and capital receipts for the Council encourage businesses to locate and invest within the District;
- Identification of appropriate land within the Council's ownership to bring to market that encourages development for housing and business uses, brings work and new customers to the District; and
- Monitoring new business start-ups at the Basepoint Centre, Bridge Road in Haywards Heath on Council land that provides affordable virtual office space and managed offices for new enterprises within the region.

People

This section looks at the Mid Sussex population and workforce and the following key findings have emerged:

Key findings:

- In Mid Sussex there is a high proportion of economically active residents and low levels of unemployment at 0.5%.
- There are relatively high levels of commuting - 44% commute out of the District and 33% commute in to Mid Sussex to work although through the development of new higher quality employment space there is the scope to retain some of these higher - skilled out - commuters.
- The resident population is highly educated with 46.6% of those aged 16-64 possessing a degree or equivalent.
- Nearly 58% of residents are in Groups 1 – 3 of the Standard Occupational Classification as managers, senior officials, professional and technical occupations.
- Median earnings by residence of full-time workers who live in Mid Sussex of £615.80 are higher than median earnings by Mid Sussex workplace at £537.60.
- Gross Value Added (GVA) per employee overall is relatively high compared to other Coast to Capital authorities, but the finance and insurance sectors in Mid Sussex perform better.
- There is a lack of dedicated 6th form provision in the District.
- There are growing numbers of apprenticeships in the District with 640 starts in 2014/15.



“Mid Sussex is home to a highly educated and skilled workforce. As locally based science and technology business we are keen to attract more of that expertise. Looking ahead we’re keen also to have a future supply of skilled workers, so strong education provision in the district, and strong links to nearby universities is important to us too”.

**Cells4Life
Burgess Hill**





Mid Sussex Population and Workforce

Mid Sussex has a total population of around 147,000 with just over half residing in Burgess Hill (28,800), East Grinstead (23,900) and Haywards Heath (22,800). Mid Sussex has economic activity and employment rates that are well above the average and a highly educated workforce.

Working Age Population and Labour Supply

Over 60% of the district's population are of working age, which is nearly the same as the average for West Sussex, but slightly below the regional level.

Population aged 16 - 64	Mid Sussex (Number)	Mid Sussex (%)	South East (%)
All people aged 16 - 64	88,400	61	62
Males aged 16 - 64	43,700	61	63
Females 16 - 64	44,700	60	61

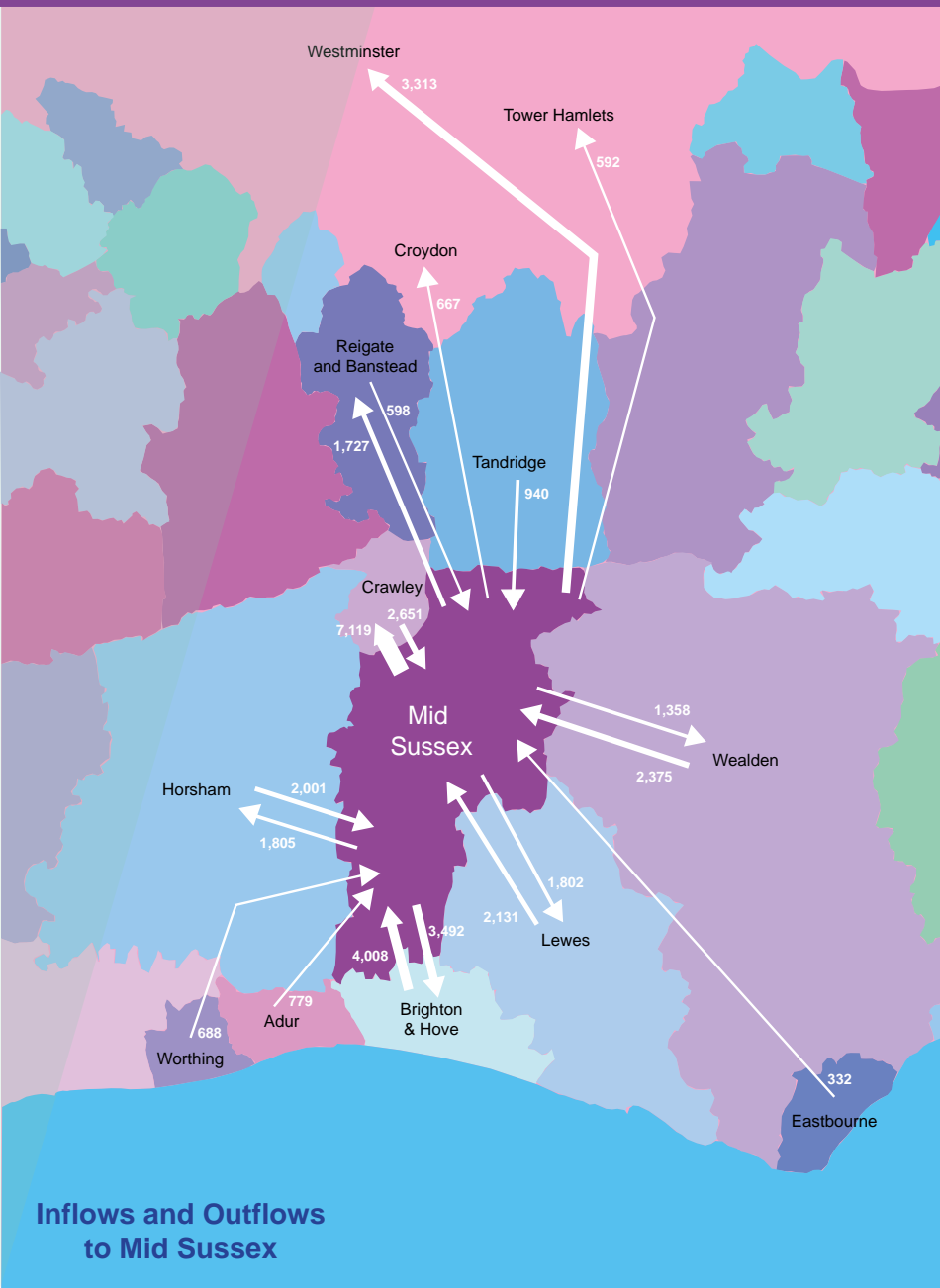
Source ONS population estimates 2015 accessed through Nomis

Mid Sussex has a high proportion of economically active residents and low levels of unemployment.

Economically Active	Mid Sussex (Number)	Mid Sussex (%)	South East (%)
Total Economically Active	76,500	83	81
In employment	75,100	81	77
- Employees	62,700	69	65
- Self employed	12,500	12	12
Unemployed	1,900	2	4

Source ONS annual population survey April 2015 – March 2016 accessed through Nomis





Travel to work

The number of people economically active (i.e. people available to work) in Mid Sussex is over 75,000, which accounts for 83% of the 16-64 year old population of the District. There are around 73,000 people in the District in employment. Around 44% of residents (31,745 at 2011) commute out of the District and over 33% of workers in the District commute in to Mid Sussex to work.

The relatively high level of in and out commuting has a impact on infrastructure. While it is recognised that in commuters make a significant financial contribution to the District, it is important that appropriate employment opportunities are promoted within the District to ensure that people who live locally have the opportunity to work locally.

	% 2011 Census
% who live and work in the District	48%
Work mainly at home	13%
Commute within the area	35%
Travel to work by private vehicle	67%
Travel to work by public transport	5%
Travel to work on foot or cycle	28%

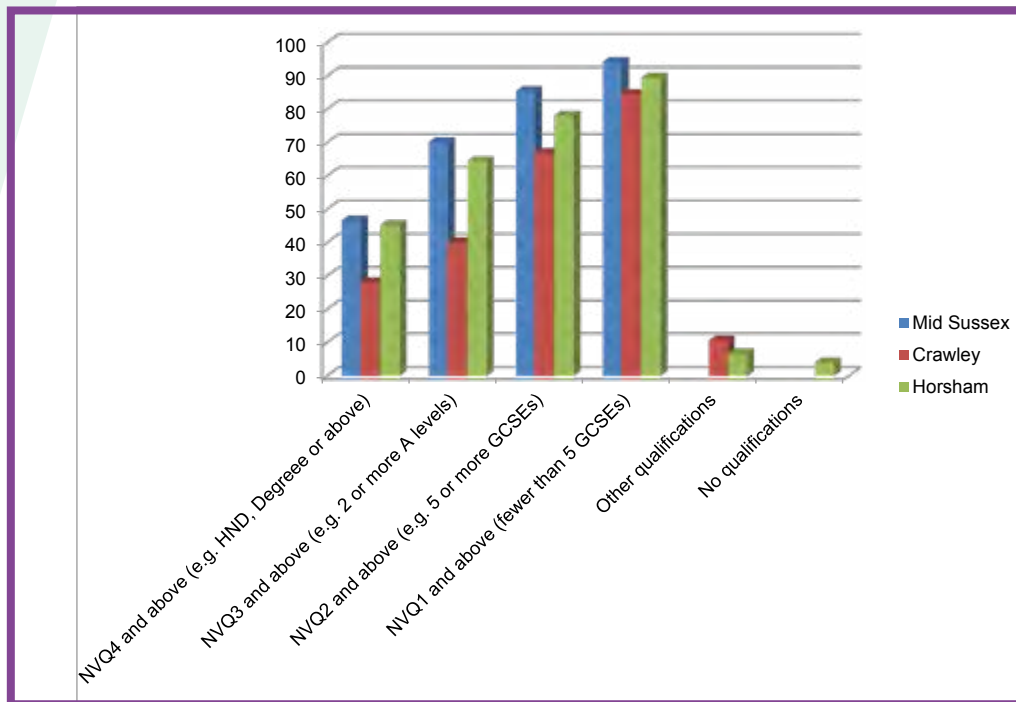


Employment

Mid Sussex has one of the lowest unemployment rates in the country. **The total number of unemployed claimants in Mid Sussex constituency in July 2016 was 302.** This includes 216 people claiming Jobseeker’s Allowance and 86 people claiming Universal Credit who were required to seek work. This represents a rate of 0.5% of the economically active population aged 16 to 64, which ranks Mid Sussex as 7th best out of 650 UK constituencies. The equivalent UK claimant rate as a whole was 2.4%.

Educational standards

Mid Sussex has a highly educated workforce, with 46.6% of those aged 16-64 possessing a degree or equivalent qualification and 70.15% with 2 or more “A” levels. Both are the highest in West Sussex and above the averages for the South East of 39.8% and 60.4% respectively.

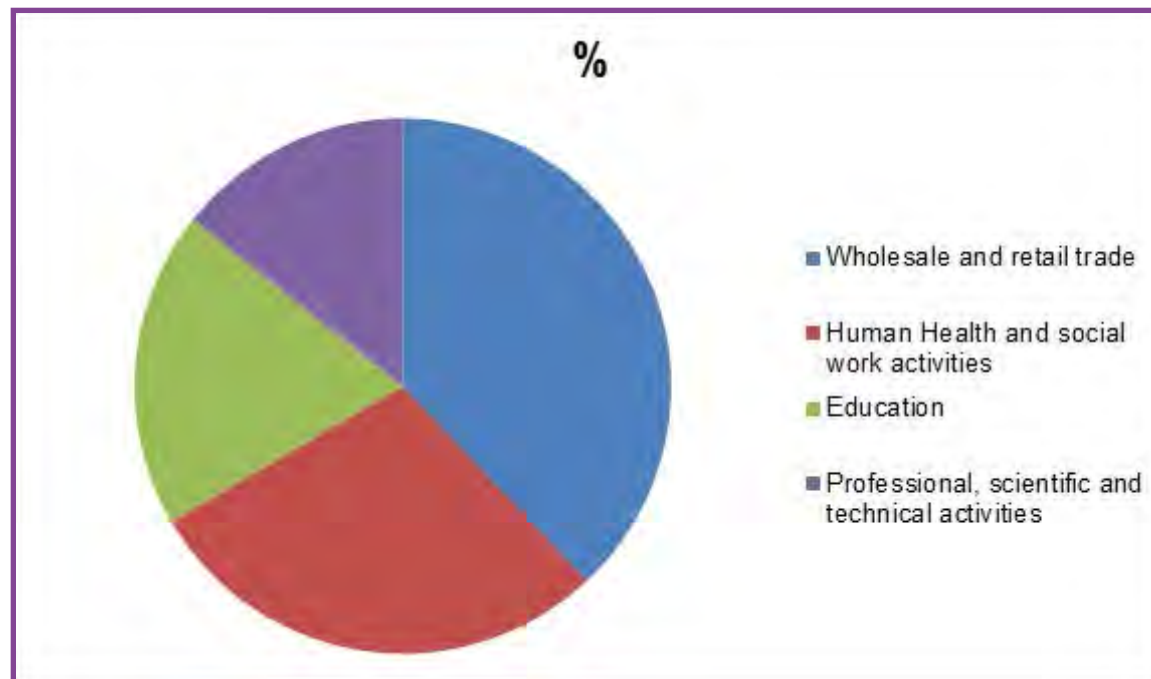




There were 56,800 employees working in Mid Sussex in 2015, 49,100 (87%) working in the private sector. Mid Sussex is in line with the West Sussex average, and has a higher proportion of private sector employees compared to England as a whole (83%).

Two thirds (66%) of local employees in Mid Sussex work full-time and 34% work part-time, which is in line with the West Sussex average. In England as a whole 69% are full-time and 31% part-time. Four sectors account for over half (55%) of employee jobs in Mid Sussex as follows:

Wholesale and retail trade	(21%)
Human Health and social work activities	(16%)
Education	(11%)
Professional, scientific and technical activities	(8%)



Employment by Occupation

Standard Occupational Classification (SOC)	Adur (%)	Arun (%)	Chichester (%)	Crawley (%)	Horsham (%)	Mid Sussex (%)	Worthing (%)
Soc 2010 major groups 1 - 3	39.1	42.0	56.6	34.1	51.7	57.9	38.6
1. Managers, directors and senior officials	12.8	11.4	18.8	#	16.8	15.7	#
2. Professional occupations	12.7	15.4	21.3	11.9	20.5	22.0	16.8
3. Associated professional and technical	13.1	15.3	16.5	14.4	14.4	20.2	16.1
Soc 2010 major group 4-5	17.7	16.3	23.9	22.0	23.0	19.5	30.6
4. Administrative and secretarial	#	9.8	16.9	12.3	12.5	11.1	15.1
5. Skilled trade occupations	#	#	#	#	10.5	8.4	15.5
Soc 2010 major group 6-7	24.0	23.3	10.4	18.6	17.3	16.4	15.6
6. Caring, leisure and other support occupations	#	13.5	#	9.9	9.4	8.4	10.9
7. Sales and customer service occupations	15.2	9.8	#	#	7.9	8.0	#
Soc 2010 major group 8-9	19.2	18.4	#	25.2	8.0	6.3	15.2
8. Process plant and machine operatives	#	#	#	11.9	N/A	#	#
9. Elementary occupations	#	11.5	#	13.3	6.9	#	9.8

Source ONS Annual Population Survey April 2015 – March 2016 accessed through NOMIS # denotes sample too small for reliable estimate

Nearly 58% of Mid Sussex residents are employed in Groups 1-3 of the Standard Occupational Classification as managers, directors, senior officials, professional and associated professional and technical occupations as shown in the table above. This is well above the average for the South East of 49% and West Sussex of 47%.



Percentage of Employees in Employment by Sector 2015

	Adur	Arun	Chichester	Crawley	Horsham	Mid Sussex	Worthing	West Sussex
Industry	%	%	%	%	%	%	%	%
Primary & Utilities (A,B,C,D and E)	2.1	0.8	1	2.5	1.4	1.1	2.2	1.6
C: Manufacturing	12.8	7.6	8.1	6.3	7.4	5.6	6.1	7.1
F: Construction	5.6	4.8	4.3	1.9	6.4	4.7	2.6	4
G: Wholesale and retail trade, repair of motor vehicles and motorcycles	21.6	20.6	16.3	14.6	20.7	20.7	16.6	18
H: Transportation and storage	2.8	3.7	2	23.2	2.4	2.7	2.3	7.6
I: Accommodation and food services activities	6.3	13.1	9.7	8.7	6.9	7.3	5.2	8.3
J: Information and communications	3.2	1.9	2.6	3.2	4.9	3.9	2.8	3.3
K: Financial and insurance activities	2.5	1.5	2.5	3.4	3.5	6.8	7.5	4.1
L: Real Estate Activities	1.2	1.7	3.5	0.5	2.2	2.2	1.8	1.8
M: Professional, scientific and technical activities	7.2	4.8	6.2	5.8	9.3	8.8	5.9	6.8
N: Administrative and supprt service activities	6.4	7	10.5	15.9	7.4	5.9	6.8	9.5
O: Public administration and defence, compulsory social security	3.7	3.5	4.4	2.6	1.8	1.5	4.7	3.1
P: Education	9.8	8.5	9.8	4.8	9.5	10.5	7.5	8.2
Q: Human health and social work activities	10.3	15.8	13.4	4.3	9.9	13.7	24.1	12.3
Arts, entertainments, recreation & other services (R,S,T and U)	4.5	4.8	5.7	2.2	6.5	4.3	3.9	4.3
Column Total	100	100	100	100	100	100	100	100
Total Number of Employees	17,900	40,900	56,900	84,600	49,900	55,400	45,800	
Public Sector % Share	14	13	16	9	10	13	24	14
Private Sector % Share	86	87	84	91	90	87	76	86

From BRES Analysis (The Business Register and Employment Survey) information at 2015



Average Earnings

Mid Sussex residents have above average earnings, £615.80 per week against the average for the South East of £574.90, meaning that the local economy has access to relatively wealthier consumers than other areas. The following tables show that the average earnings for residents in the district are significantly higher than those working in but living outside the district. The large number of commuters, would indicate that many of those who work in Mid Sussex live in less expensive housing areas, and many who live in Mid Sussex commute to London, Crawley and Gatwick where salaries are higher.

Earnings by residence 2015

Gross Weekly Pay	Adur	Arun	Chichester	Crawley	Horsham	Mid Sussex	Worthing
Full-time workers	£500.4	£486.2	£540.0	£544.7	£627.9	£615.8	£522.3
Male Full-time workers	£604.4	£555.3	£598.6	£593.2	£729.8	£673.4	£522.0
Female Full-time workers	£443.5	£377.6	£477.0	£498.3	£460	£510.5	£472.0

Source: ONS annual survey of hours and earnings 2015- resident analysis. Note median earnings in pounds for employees living in the area.

Earnings by workplace 2015

Gross Weekly Pay	Adur	Arun	Chichester	Crawley	Horsham	Mid Sussex	Worthing
Full-time workers	£406.5	£419.7	£481.0	£597.6	£528.1	£537.6	£489.4
Male full-time workers	£464.1	£462.5	£498.3	£669.3	£544.1	£557.1	£545.0
Female full-time workers	£397.3	£386.9	£426.9	£479.7	£454.1	£470.9	£418.7

Source: ONS annual survey of hours and earnings 2015- workplace analysis. Note median earnings in pounds for employees working in the area.



Productivity in Mid Sussex as measured by Gross Added Value (GVA) per employee was £52,573 in 2014 and is comparatively low relative to the other Coast to Capital local authorities. This may be a reflection of the number of residents that commute out of the district to work.

Estimated GVA per Employee	2010	2011	2012	2013	2014
South East	£54,350	£56,235	£58,818	£60,427	£61,334
Coast to Capital	£54,340	£54,837	£57,291	£59,761	£61,136
West Sussex	£52,532	£52,350	£54,792	£57,027	£58,377
Mid Sussex	£49,118	£46,536	£47,889	£47,462	£52,573

Source Coast to Capital GVA estimates December 2015





Knowledge Intensive Business Services Jobs

Knowledge Intensive Business Services (KIBs) are companies that provide inputs to the business processes of other organisations, based heavily on their advanced technological or professional knowledge. The KIBs sector includes a range of activities such as computer services, research and development services, management services, architecture, engineering and technical services. As such they are important in promoting economic growth in an area through knowledge share and transfer.

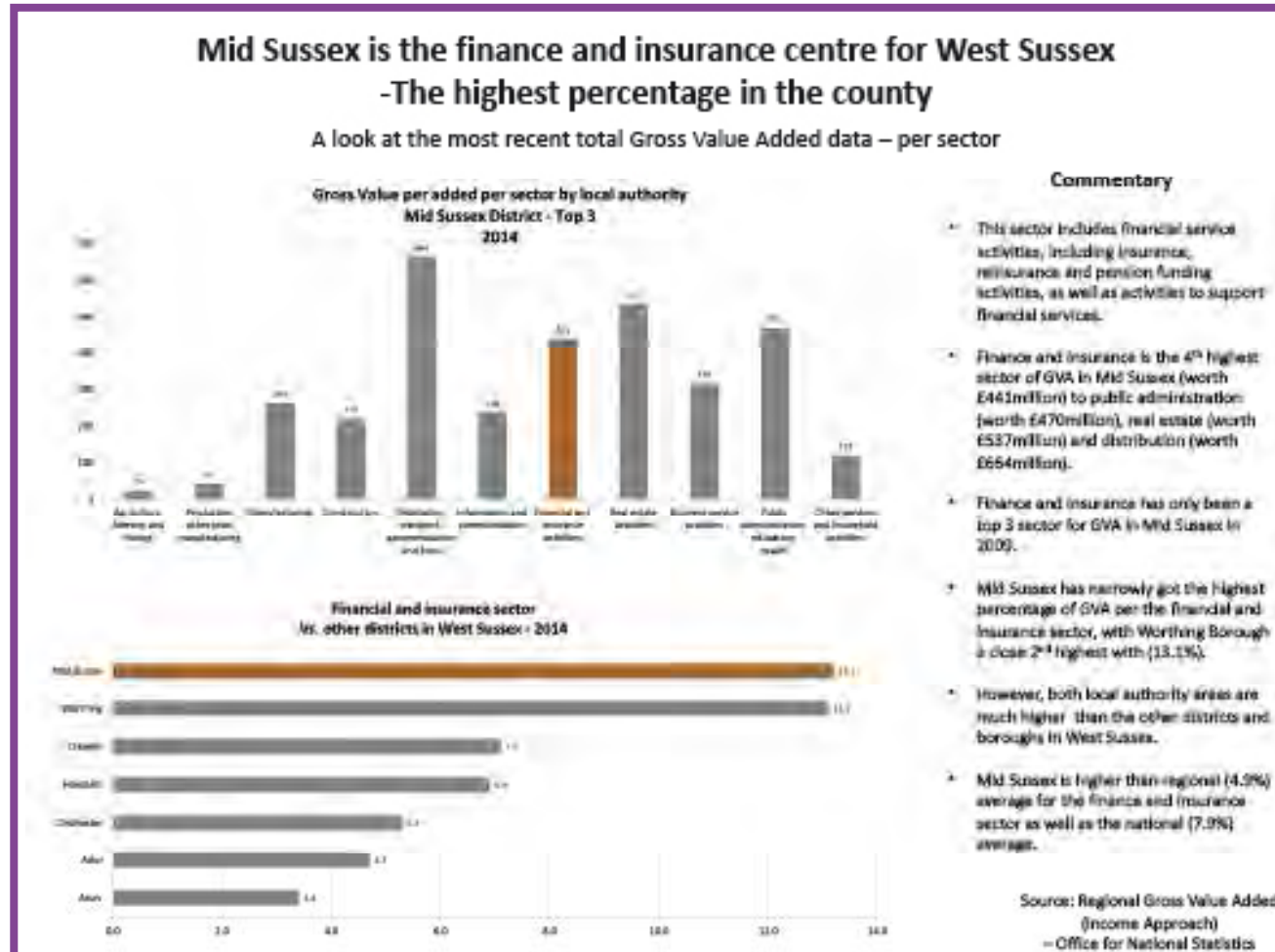
KIBs jobs tend to be higher skilled, better paid jobs. The table below shows KIBs jobs against the total number of jobs in Mid Sussex and other local authority areas in the Gatwick Diamond.

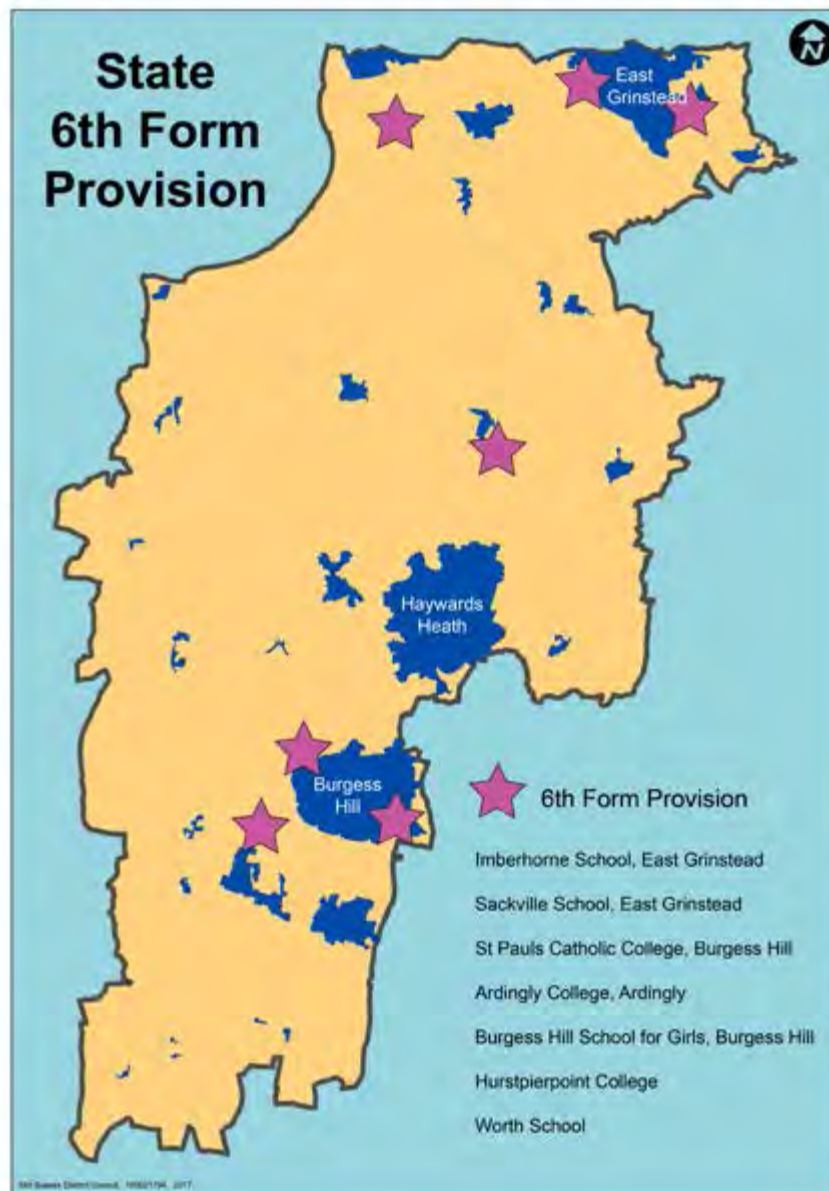
Gatwick Diamond Local Authority	KIBS jobs	Total jobs	KIBS as a share of total
Epsom and Ewell	7,900	32,200	24.5%
Mole Valley	14,600	46,700	31.3%
Reigate and Banstead	17,300	67,700	25.6%
Tandridge	4,900	33,100	14.8%
Crawley	10,700	78,500	13.6%
Horsham	8,800	54,200	16.2%
Mid Sussex	9,700	59,700	16.2%

Source: ONS, Business Structure Database (2016). Values are rounded to the nearest 100.

Finance and Insurance Sector

One area where the Mid Sussex economy scores particularly well in terms of Gross Value Added is the finance and insurance sector. Mid Sussex is regarded as the finance and insurance centre for West Sussex with a GVA of £414 million in 2014. This sector includes financial services activities, including insurance, reinsurance and pension funding activities, as well as activities to support financial services.





6th Form provision in Mid Sussex

The map aside shows 6th Form provision in the District.

The closure of Central Sussex College has removed the only specialist state 6th Form College in the District with access to state 6th Form now limited to that provided in secondary schools.

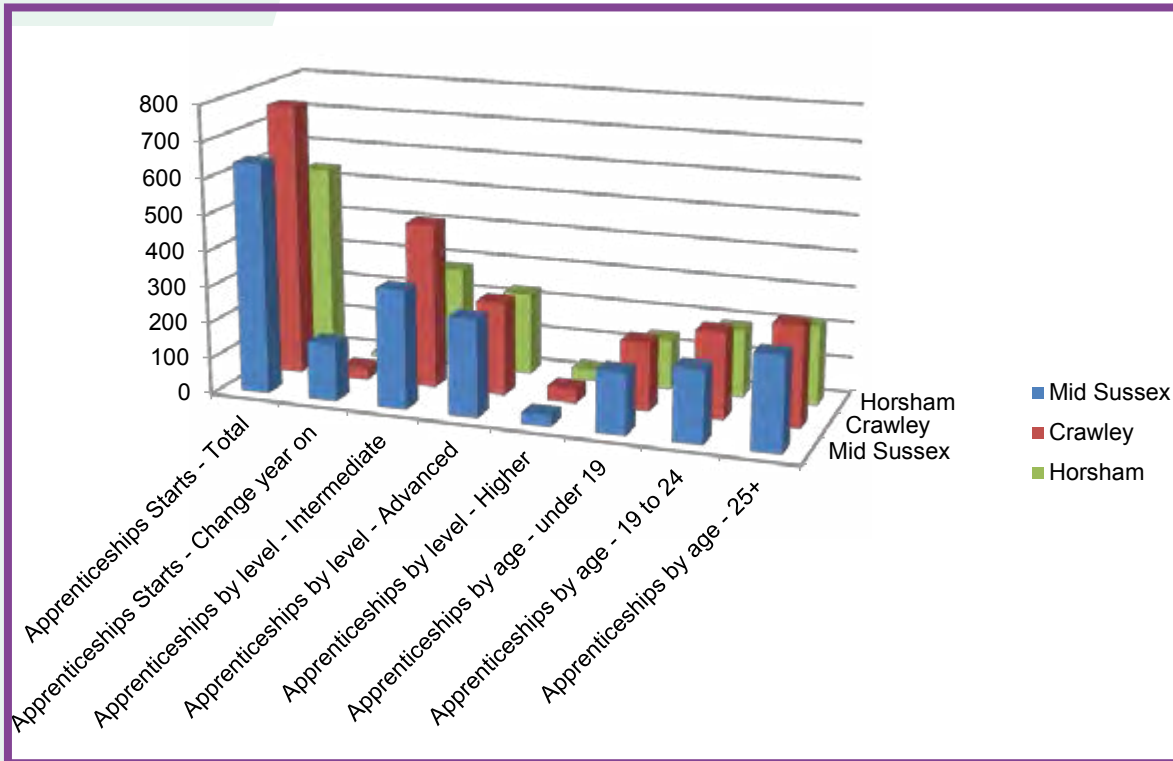
Mid Sussex is not home to a centre for higher education, but is close to the Universities of Sussex and Brighton.

The District is well provided with independent 6th Form opportunities with Ardingly College, Burgess Hill School for Girls, Hurstpierpoint College and Worth School all offering post 16 education.



Apprenticeships

Apprenticeships starts in 2014/15 by Parliamentary Constituency

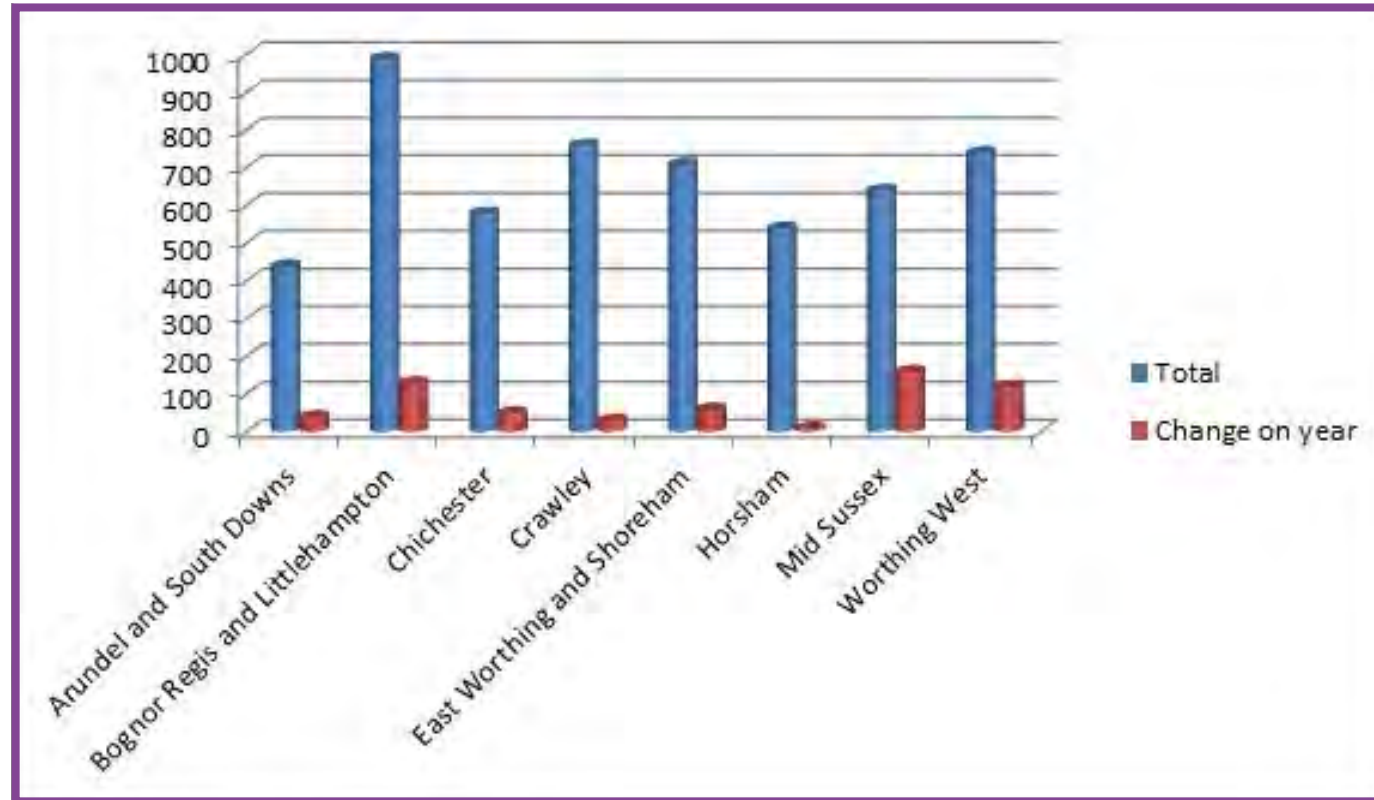


Source House of Commons Apprenticeship Statistics for England: 1996-2015 supporting documents

<http://researchbriefings.parliament.uk/ResearchBriefing/Summary/SN06113>

An apprenticeship is employment with qualification-based training provided, allowing individuals to earn while they learn and achieve recognised qualifications. All adults over the age of 16 and not in full time education can apply for an apprenticeship. They take 1-4 years to complete and cover a wide range of sectors. Mid Sussex has had the largest increase in starts in West Sussex between 2013/14 and 2014/15 of 160.





Mid Sussex has had the largest increase in apprenticeship starts in West Sussex between 2013/14 and 2014/15.

Number of apprentices employed by MSDC in 2016/17 = 2

Number hoped to be employed by MSDC in 2017/18 = 6

Promotion

This section examines the promotion of Mid Sussex as a district for businesses to locate, and as a tourist destination.

Key findings:

- Mid Sussex is part of the Northern West Sussex Economic Sub-Region which in commercial property terms is currently relatively insular with the majority of enquiries for business space originating from within the sub-region. It is therefore important that Mid Sussex works within its sub regional partners to actively promote the area as a destination for investment.
- Tourism makes an important contribution to the Mid Sussex economy.
- Direct expenditure on tourism in 2015 amounted to £224 million and translated into 4,711 jobs.
- There were 436,700 staying trips in Mid Sussex in 2015.

Mid Sussex has a number of advantages which make it a key location for future investment opportunities. Its central location within the wider south east and its excellent transport links to the London, Crawley and Brighton combined with its proximity to Gatwick Airport make it a great location for a wide range of businesses. In addition the areas strong quality of life factors, high quality natural environment and access to a highly skilled work force are all factors which give Mid Sussex a competitive edge.

Together with Crawley and Horsham, Mid Sussex is part of the North West Sussex functional economic area and are an important part of the Coast to Capital Local Enterprise Partnership (LEP) area and Gatwick Diamond.

“Effective promotion of the District can help Bluebell Railway and other attractions in the area realise their full potential.”

A photograph of a man in a brown suit, white checkered shirt, and olive tie, smiling and standing next to a green steam locomotive. The locomotive has a large brass dome and is on a track. The background shows a cloudy sky and some trees.

**Bluebell Railway
East Grinstead**

The LEP Strategic Economic Plan (2014) seeks to secure investment; promotes growth in the area; identifies and supports the capacity for employment growth within the Gatwick Diamond; and recognises the role which Mid Sussex will play in achieving this. The Gatwick Diamond Initiative was established in order to attract investment into the area from within the UK and also from abroad and accordingly, seeks to promote the area as a world class business location.

Although Mid Sussex has a relatively buoyant commercial property market, it is relatively insular and self-contained. In order to continue to be competitive in the current economic climate Mid Sussex will have to work hard with its partner organisations to promote its locational advantages.





Tourism

The District has an important tourism offer with its quintessentially English countryside, encompassing the South Downs National Park and the High Weald. It is renowned for its world-class gardens, historic houses and picturesque villages. International award-winning vineyards, fine cuisine and the Bluebell Steam railway are some of the attractions that bring tourists to the District. Mid Sussex is well connected for domestic and overseas visitors with direct train links to London and Gatwick.

Tourism South East estimate that there were 436,700 staying trips spent in Mid Sussex in 2015. Direct expenditure on tourism in Mid Sussex in 2015 amounted to an estimated £224 million and translated into 4,711 jobs, 8.5% of the total jobs in the District.

The Council supports tourism in Mid Sussex in the following ways:

- We offer financial support Visit East Grinstead to promote the medieval market town and local tourist attractions such as a mountain bike park and historic houses. Details can be found here: www.visiteastgrinstead.com
- We work with the Experience Mid Sussex group of high quality attractions, hotels and venues which offers spas, restaurants, showgrounds and botanical gardens. Details can be found here: www.experiencemidsussex.co.uk
- In 2018 we will be running a stall at the Excursions group travel trade show organised by Tourism South East to promote Mid Sussex. This event will be attended by over 1200 group organisers, coach and tour operators can meet with attractions to discover, discuss and plan those visits.

The Council will continue to actively look at ways to promote tourism in the District.

