# Mid Sussex
# Economic Profile 2018



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MID SUSSEX
DISTRICT COUNCIL


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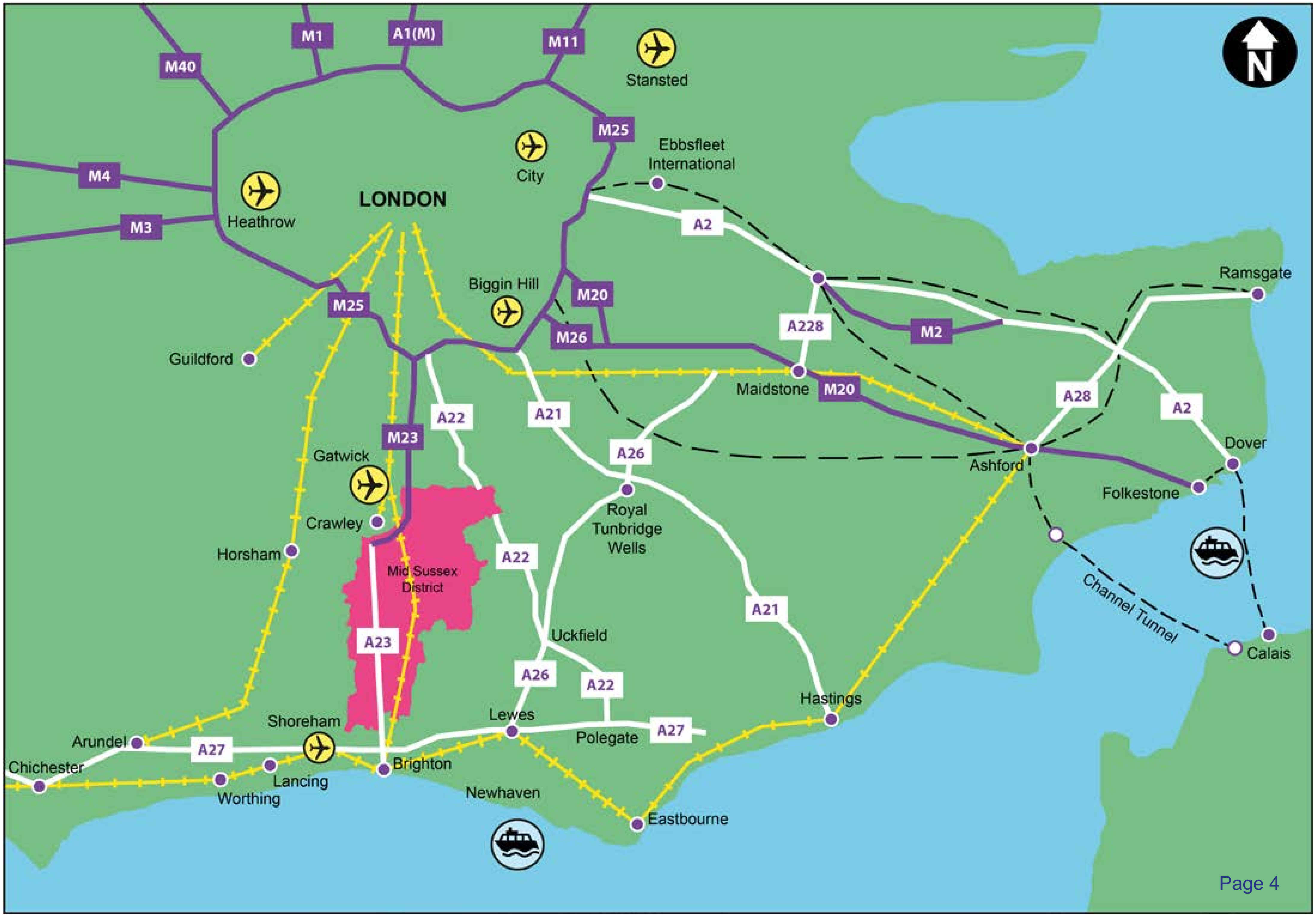
## About Mid Sussex

Mid Sussex is an affluent district in West Sussex in the South East of England with a total population of 147,000. It is an ideal location to deliver economic success, given its position between London and the coast and proximity to Gatwick Airport. There are excellent transport links by road and rail, good access to the South Coast ferry ports and to Gatwick International Airport. The District is within the Gatwick Diamond, an economic partnership consisting of the local authorities surrounding Gatwick and the Greater Brighton Economic Board, a partnership of local authorities and businesses in Brighton and the surrounding area. Mid Sussex is also part of the Coast to Capital Local Economic Partnership, which is committed to growing the economy of the area and creating jobs. There are high levels of employment and the educational standard of the local population is well above average.

Mid Sussex contains about 605,000 $m^2$ of commercial office, industrial and warehouse space. This is split relatively evenly between manufacturing, warehousing and commercial office space.

Commercial property centres around the three towns of Haywards Heath, Burgess Hill and East Grinstead but there are also business parks in some of the rural parts of the District.



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Hastings
Lewes
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Shoreham
Polegate
Arundel
A27
Brighton
Chichester
Lancing
Worthing
Newhaven
Eastbourne

The District has three main towns – Burgess Hill, East Grinstead and Haywards Heath, and a number of villages meeting local communities needs.  It is a popular place to live with a high standard of living.  The District's outstanding natural environment and rich heritage make it highly valued by its residents and a popular tourist destination.  Mid Sussex is consistently listed in the 20 best places to live in the country.  The District also benefits from low crime levels and a strong sense of community.

The Mid Sussex economy is diverse and is home to a number of innovative and nationally known businesses with a third of businesses in the professional, scientific and technical, and information and communication sectors. There is a range of smaller businesses across sectors such as finance, service industries and light manufacturing. The Mid Sussex area has approximately 7,300 businesses. Over 85 per cent of these employ fewer than 10 people with the majority employing fewer than five employees. The District continues to see a high number of business start-ups each year and it is a resilient economy, with survival rates better than the South East average.

## Aim of this Profile

The aim of this profile is to build a picture of the economic landscape of Mid Sussex to help identify the issues for inclusion in the Council's Economic Development Strategy. The information it contains is gathered from a variety of sources and includes both quantitative data and feedback from our contacts with the Mid Sussex business community.
The Profile will be regularly updated to assess progress with the implementation of the Economic Development Strategy.
The document is structured in line with the priority themes identified in the strategy - place, premises, people and promotion.

# Place

Having assessed the data around our places the following key issues have emerged:

**Key findings:**

- The main shopping centres in the three towns of Burgess Hill, Haywards Heath and East Grinstead are performing reasonably well as shopping destinations, but are not meeting their full potential. There is also strong competition for comparison goods from Crawley and Brighton.
- There is evidence of consumer demand not being met by shops in the District and shoppers resorting to alternative channels such as online shopping.
- Burgess Hill has additional capacity for convenience floorspace, Haywards Heath for comparison floorspace and East Grinstead for both.
- There are twenty one business parks spread across the District - the largest is the Victoria Business Park in Burgess Hill. There has not been sufficient growth in industrial floorspace to meet demand.
- There are twenty town centre Council car parks operated by pay and display with 1.68 million transactions in 2016/17 however 83 per cent of transactions are for less than two hours.
- A lack of car, van and lorry parking for businesses in the District, particularly in the town centres and at the Victoria Business Park in Burgess Hill, is seen as an issue by the business community.
- There are relatively high house prices and affordability issues with a ratio of median house prices to median earnings in 2015 of 12.
- Superfast broadband availability in Mid Sussex is at the average level of 86 per cent.  However, there are slow broadband speeds and mobile “not spots” in some rural locations.
- There is a lack of conference and hotel accommodation, particularly in the towns which is an issue for the business community.

“Business in the town centre remains strong. But competition from on-line retail and from nearby destinations like Brighton and Crawley is a challenge. Making the District’s town centres more accessible and attractive would really help.”


**Grape and Grain**
**Haywards Heath**

## Town centres and retail spaces

The main shopping centres in Mid Sussex are in the three towns of Burgess Hill, Haywards Heath and East Grinstead. The Mid Sussex District Council (MSDC) Retail Study (Carter Jonas, May 2016) found that while the three towns are performing reasonably well as shopping destinations, they are not meeting their full potential, with a need to improve their attractiveness to minimise the competition from other towns outside the District. There is also competition from out-of-town shopping facilities and the growth in online shopping. Information from an Experian Study in 2017 placed Haywards Heath in eighth place in their top 50 retail centres for multi-channel shopping. This points to a high level of consumer demand not being met by traditional local shops and shoppers resorting to alternative channels such as shopping online.

The MSDC Retail Study identified that the three main town centres face competition from Brighton and Crawley for non-food purchases, especially for fashion shopping. The Study identified the potential for expansion of the food and convenience goods offers in the three main town centres. For Burgess Hill, an under-provision of clothing and fashion shops has been identified. Prime Zone A rents achieved are generally lower than East Grinstead and Haywards Heath. Haywards Heath was seen as performing well as a non-food shopping location in Mid Sussex. Hassocks and Hurstpierpoint are the District's two largest village centres. Both were found to be performing relatively well.

Plans for major new investments in retail schemes are in place, with a £35m Haywards Heath station site redevelopment including a new Waitrose store now complete and the £65m redevelopment of the Martlets Shopping Centre in Burgess Hill, which will provide an extra 21,336 square metres of retail space. Improvements planned in East Grinstead include the redevelopment of the Queens Walk area.

**Mid Sussex retail centres**

This section of the profile provides information about the three towns as retail centres.  Classifications of retail units refer to comparison and convenience shops.  The latter refers to outlets which sell consumer goods purchased on a regular basis, including food, groceries and cleaning materials.  Comparison goods include durable goods such as clothing, household goods, furniture, DIY and electrical goods.  Information comes from the Local Data Company reports 2017.

The council is working with West Sussex County Council to establish footfall data for the three town centres and this will be available for the next Profile.


The MSDC Retail Study assessed the vitality and viability of the town and village centres in Mid Sussex and looked at the quantitive need for new retail space over the District Plan period (up to 2031) having taken into account population projections; housing allocations; retail expenditure data and analysis of shopping patterns based on a telephone survey.

Hassocks, Hurstpierpoint and our smaller villages have additional retail capacity for both convenience and comparison good floorspace, although the scale is smaller, reflecting the size and catchment of these centres.

**Burgess Hill**

Although the new Lidl store will meet need of the demand initially, by 2024, there is additional retail capacity for convenience floorspace and by 2029 this capacity exceeds 1,500m$^2$. The redevelopment of the Martlets addresses the identified comparison capacity in Burgess Hill until 2031.

**East Grinstead**

The limited supply of new retail floorspace means that there is significant capacity in both convenience floorspace (nearly 3,500m$^2$ by 2031) and comparison floorspace (over 4,000m$^2$ by 2031).

**Haywards Heath**

The new Waitrose has absorbed the future forecast convenience retail capacity by unit 2031 however there is significant capacity for comparison floorspace (over 3,500m$^2$ by 2031).

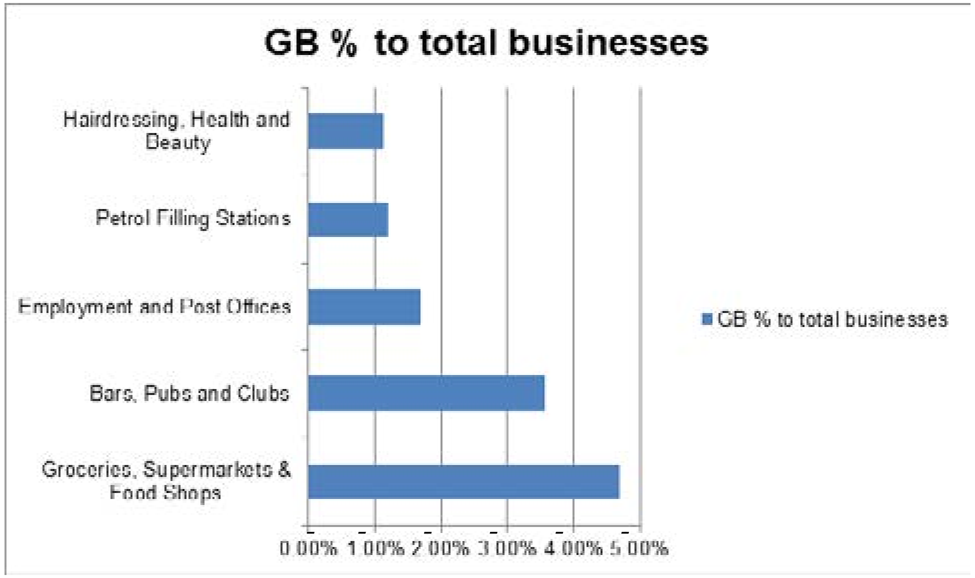
The Council maintains a record of Health Check data of our town centres, including land uses and vacancy rates, and the health of our centres is set out below.

**Burgess Hill**

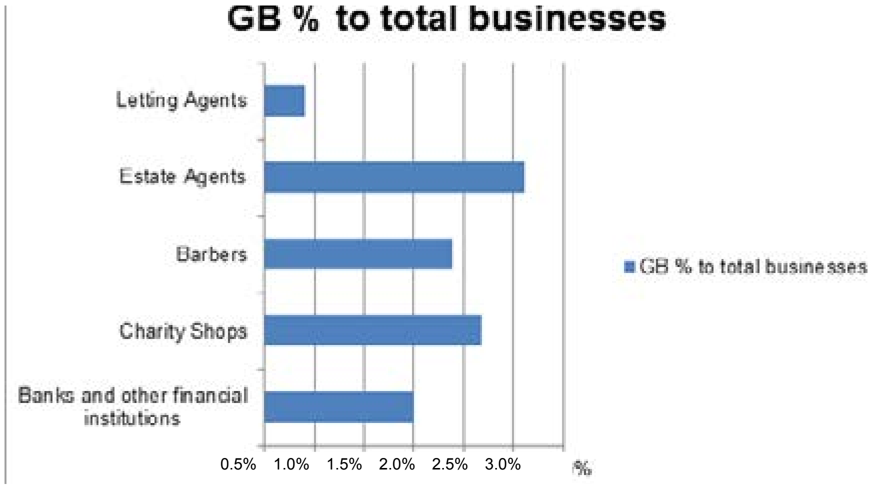
Overall Burgess Hill has 178 retail, service and leisure units, 46 of which are in the Martlets main shopping centre. The Martlets Centre has planning permission for significant levels of redevelopment including the provision of larger floorspace sites suitable for fashion retail. The proposals also include provision for a multiplex cinema and an increased food and beverage offer. This improved retail and leisure offer combined with significant improvements to the public realm will enhance the vitality and viability of Burgess Hill.

Classification of retail and vacant units in Burgess Hill compared to Britain as a whole (June 2017).

| Classification | Number | % of total | National (%) of total |
|---|---|---|---|
| Comparison | 52 | 31 | 29 |
| Convenience | 10 | 6 | 13 |
| Service | 64 | 37 | 27 |
| Leisure | 37 | 22 | 25 |
| Miscellaneous | 7 | 4 | 6 |
| Vacant Units | 18 | 10 | 11 |




Set out on this table are businesses which are under represented or over represented in Burgess Hill compared to the GB average. The redevelopment of the Martlets is seeking to address this.




Vacancy rates in Burgess Hill overall are higher than in the other two main towns at 10 per cent, but below the national average of 11 per cent. For the Martlets Shopping Centre, the vacancy rate is 13 per cent due in part to the imminent redevelopment. In Burgess Hill 42 per cent of the comparison shops are run by [national chains] as opposed to 58 per cent run by independents. The national average is 35 per cent to 65 per cent respectively. For Burgess Hill overall the quality of the multiple comparison goods offer in 2017 is 3 per cent premium, 60 per cent mass and 38 per cent value.

Looking at retail and service floorspace, the 2014 Retail Study estimated that Burgess Hill has a total retail and service floorspace of 35,416m$^2$ , broken down as follows:

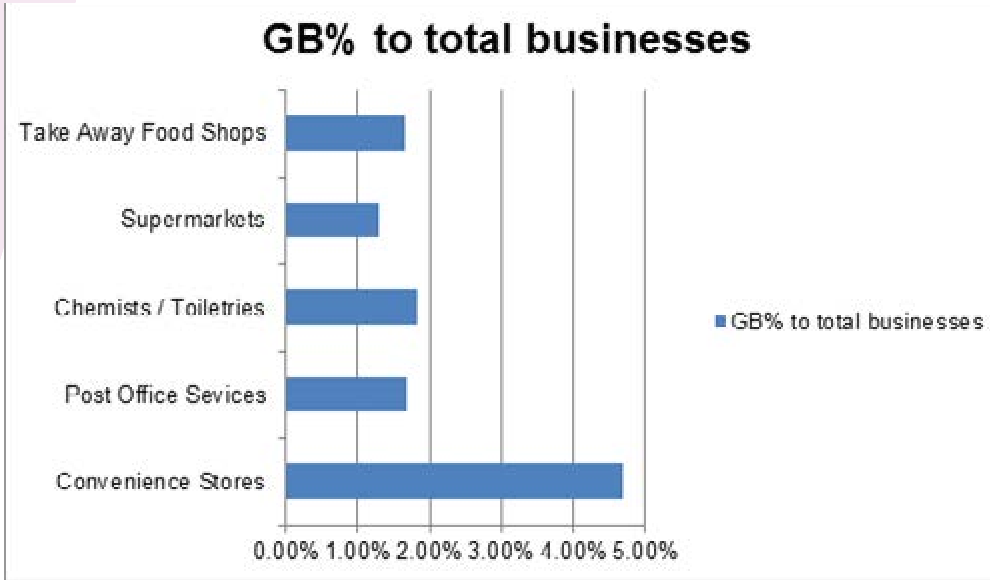
| **Category** | **Floorspace m$^2$** | **% of total** | **UK average %** |
|---|---|---|---|
| Convenience | 5,091 | 14.4 | 14.9 |
| Comparison | 12,050 | 34.0 | 36.3 |
| Total Service | 14,177 | 40.0 | 39.0 |
| - Retail Service (i.e. health & beauty, travel agents, opticians, etc)<br>- Leisure Servcie (bars & clubs, cinema, and sport halls, etc)<br>- Finance & business (banks, building societies, etc) | 3,317<br>6,949<br>3,911 | 9.4<br>19.6<br>11.0 | 7.4<br>23.2<br>8.2 |
| Vacant | 4,143 | 11.7 | 9.3 |
| **Total** | **35,461** | **100** | **100** |

**East Grinstead**

Overall East Grinstead has 249 retail units 13 of which are at Queens Walk, the main shopping area. The current classification of business premises in East Grinstead compared to Britain as a whole (June 2017) demonstrate that the centre is relatively 'healthy'.

| Classification | Number | % of total | GB (%) |
|---|---|---|---|
| Comparison | 85 | 34 | 29 |
| Convenience | 16 | 6 | 13 |
| Service | 75 | 30 | 27 |
| Leisure | 57 | 23 | 25 |
| Miscellaneous | 16 | 6 | 6 |
| Total | 249 | 100 | 100 |
| Vacant units | 17 | 7 | 11 |

Set out below are tables which highlight those businesses which are under represented or over represented in East Grinstead compared to the GB average.




The historic core of the town centre dates back to the 14th and 15th Centuries, is identified as a Conservation Area and gives East Grinstead a distinctive character and feel.


Oversupply by business type (top 5)

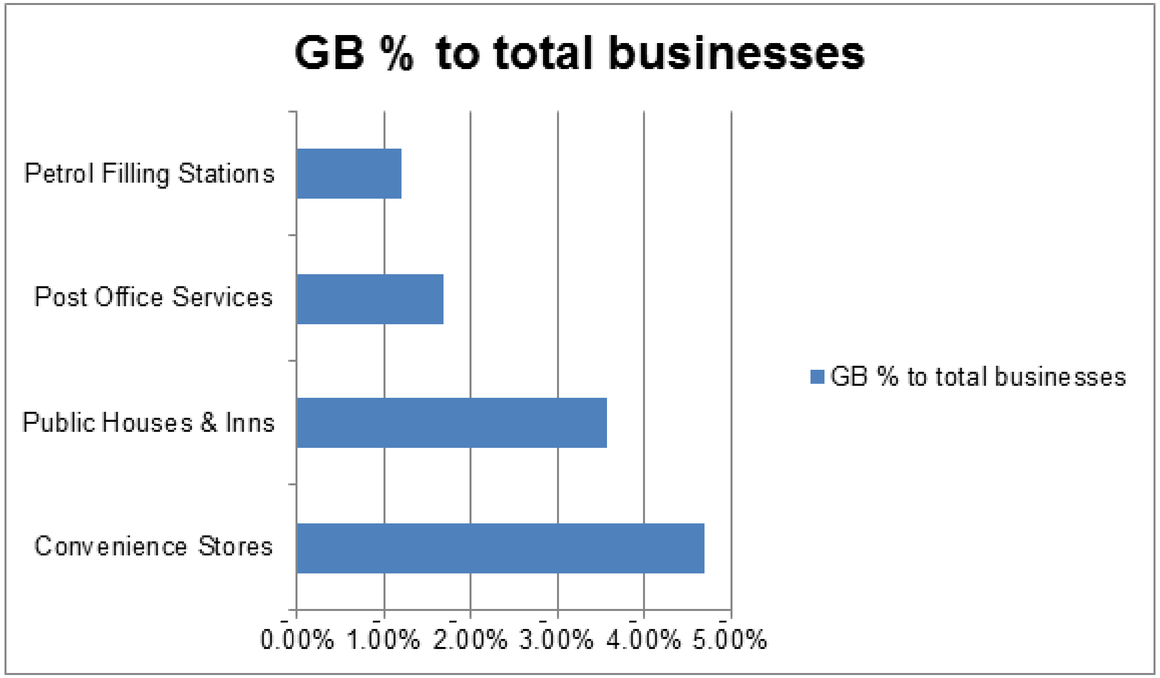
The overall vacancy rate at June 2017 was 7 per cent, which is below the national average of 11 per cent. East Grinstead has a breakdown of 37 per cent multiples and 63 per cent independent retailers, compared to the national average of 35 per cent multiples and 65 per cent independents. The quality of multiple comparison goods offer in East Grinstead is 6 per cent premium, 60 per cent mass and 33 per cent value.

| Category | Floorspace $m^2$ | % of total | UK average % |
|---|---|---|---|
| Convenience | 4,394 | 11 | 15 |
| Comparison | 14,446 | 37 | 36 |
| Total Service: | 17,113 | 44 | 39 |
| - Retail Service (i.e. health & beauty, travel agents, opticians, etc)<br>- Leisure Servcie (bars & clubs, cinema, and sport halls, etc)<br>- Finance & business (banks, building societies, etc) | 4,822<br>7,423<br>4,868 | 12<br>19.<br>13 | 7<br>23<br>8 |
| Vacant | 2,769 | 7 | 9 |


### Haywards Heath

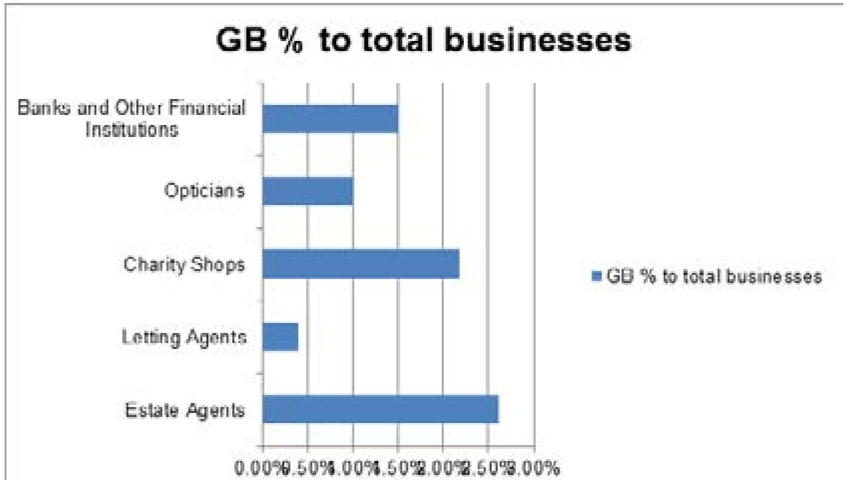
Overall Haywards Heath has 247 retail units, 36 of which are in the main shopping centre known as The Orchards. The current classification of business premises in Haywards Heath compared to Britain as a whole (June 2017) demonstrate that the centre is relatively 'healthy'.

| Classification | Number | % of total | GB (%) |
|---|---|---|---|
| Comparison | 85 | 33.7 | 29 |
| Convenience | 21 | 8.3 | 13 |
| Service | 87 | 34.5 | 27 |
| Leisure | 46 | 18.3 | 25 |
| Vacant Units | 12 | 4.9% | 11.0 |




The new Waitrose, station redevelopment and car parking have improved the quality of public realm and arrival experience to this centre by public transport. Along with the recent permissions for planning a new hotel, these developments demonstrate a strong appetite for investment in Haywards Heath.

Oversupply by business type (top 5)




The vacancy rate at 5 per cent is well below the national average of 11 per cent. Overall Haywards Heath has 44.7 per cent multiples 55 per cent independents, against the Great Britain average of 35 per cent to 65 per cent. For the Orchards shopping centre the breakdown is 56 per cent multiple and 44 per cent independent retailers. For Haywards Heath overall the quality of multiple comparison goods offer is premium 9 per cent, mass 66 per cent and value 25 per cent.

Looking at retail and service floorspace, the 2014 Retail Study estimated that Haywards Heath has a total retail and service floorspace of 33,807m$^2$, broken down as follows:

| **Category** | **Floorspace m$^2$** | **% of total** | **UK average %** |
|---|---|---|---|
| Convenience | 2,824 | 8 | 15 |
| Comparison | 16,602 | 49 | 36 |
| Total Service: | 11,873 | 35 | 39 |
| - Retail Service (i.e. health & beauty, travel agents, opticians, etc)<br>- Leisure Servcie (bars & clubs, cinema, and sport halls, etc)<br>- Finance & business (banks, building societies, etc) | 3,094<br>5,035<br>3,744 | 9<br>14<br>11 | 7<br>23<br>8 |
| Vacant | 2,508 | 7 | 9 |
| **Total** | **33,807** | **100** | **100** |

### Village retail centres in Mid Sussex

The Mid Sussex Retail Study 2014 also set out the results of the health checks of Hassocks and Hurstpierpoint (the two largest of the village centres). The study concluded that these centres are performing well in their roles as community “hubs”, meeting the more frequent retail, service and leisure needs of their local populations.

### Hassocks

The primary shopping area in Hassocks runs along Keymer Road, the main exception to this being the Garden Centre, south of Stonepound Crossroads.  Hassocks retail operators are generally independents.  There is a good level of car parking, including surface car parks behind the parades and some on-street parking.  In addition to a Budgens store, there is also a Sainsbury’s Local convenience store. The village has a good level of service provision, including opticians, a pharmacy and a number of hairdressers and estate agents.

### Hassocks retail composition 2014

| Category / Use Class | Number of units | Percentage (%) |
|---|---:|---:|
| Convenience | 5 | 9.3 |
| Comparison | 20 | 37.0 |
| Service | 27 | 50.0 |
| Vacant | 2 | 3.7 |
| **Total** | **54** | **100** |

The vacancy rate of 3.7 per cent is considerably lower than the national average of 11 per cent, demonstrating how well Hassocks village centre is performing.


## Hurstpierpoint

The main shopping area in the village is in the High Street, with the majority of retail units having independent occupiers and being of a high quality. The comparison offer consists mainly of homeware and interior decoration stores of a high quality. There has been a recent increase in the number of service units in the village including a hairdressers. The 2014 Retail Study commented that Hurstpierpoint continues to suffer congestion problems due to a lack of parking provision and the narrow road and pavement layouts.

### Hurstpierpoint retail composition 2014

| Category / Use Class | Number | Percentage (%) |
|---|---:|---:|
| Convenience | 7 | 11.1 |
| Comparison | 19 | 30.2 |
| Service | 36 | 57.1 |
| Vacant | 1 | 1.6 |
| **Total** | **63** | **100** |

Again the very low vacancy rate demonstrates the health of this village centre.

Hurstpierpoint High Street is designated as a Conservation Area and it is characterised by a rich streetscape made up of a number of listed and unlisted buildings dating back from the 14th Century and maintaining this distinctive character will be important going forward.

## Lindfield

In 2013 a study was commissioned of Lindfield village centre by the Parish to support the preparation of the Lindfield and Lindfield Rural Neighbourhood Plan. This study identified that the centre is very healthy and meets local community needs. The retail units are largely owned and operated by independent retailers and offer an attractive location for comparison retailing.

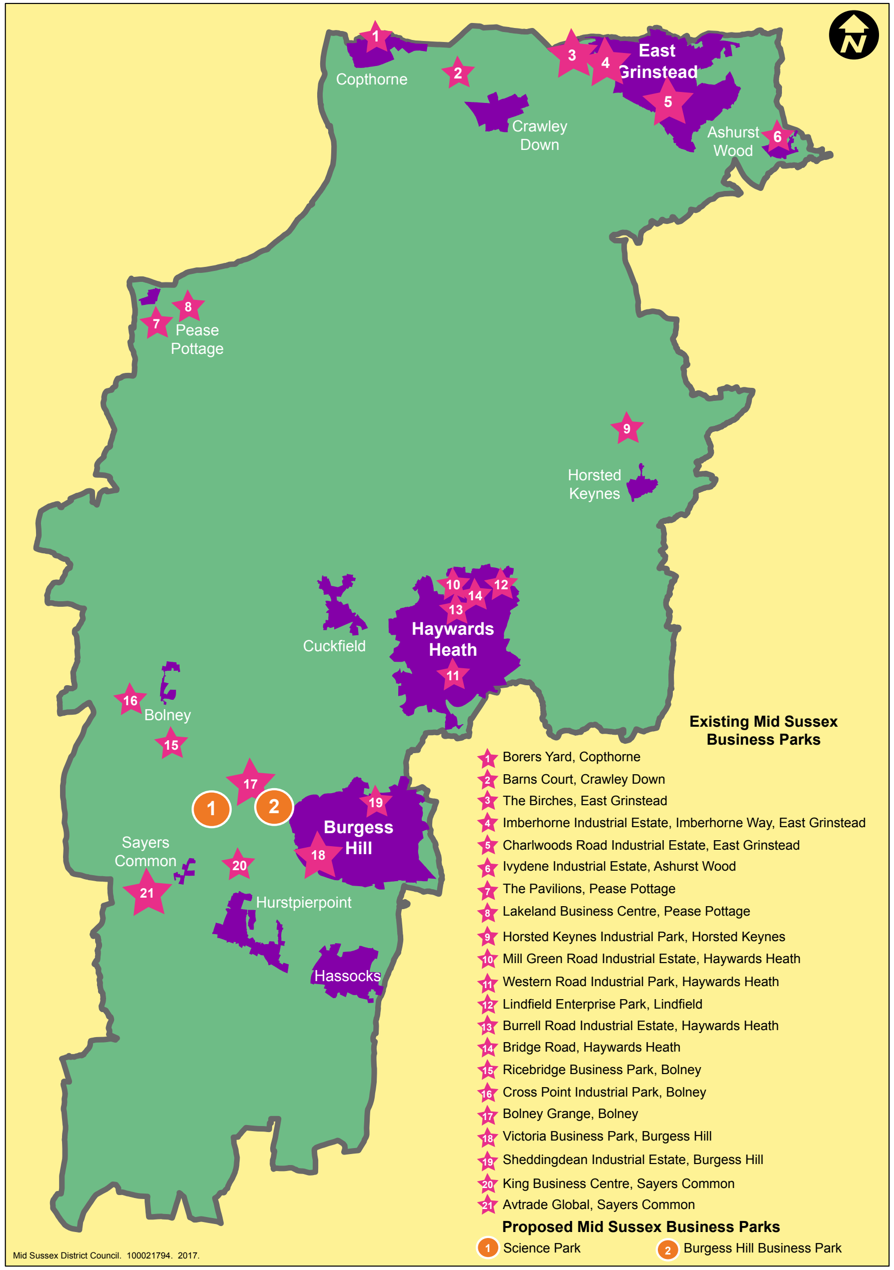
The centre is made up of 48 shops and commercial premises over half of which are in retail use. A good range of bars, cafes and restaurant uses complement the retail offer of the centre.

Only 6 per cent of the units are occupied by financial or professional services which is below the national average.

The entire centre falls within Lindfield Conservation Area and the layout and shopfronts of the centre are a strong characteristic feature which adds to the charm of this village centre.

## Business parks

The District has many successful business parks, the largest being the Victoria Business Park in Burgess Hill. Over the past few years these business parks have not expanded and few industrial units have been built. Successful, growing businesses have difficulty finding larger premises. This has resulted in a shortage of "grow on" space and "start-up" space for small and new businesses.



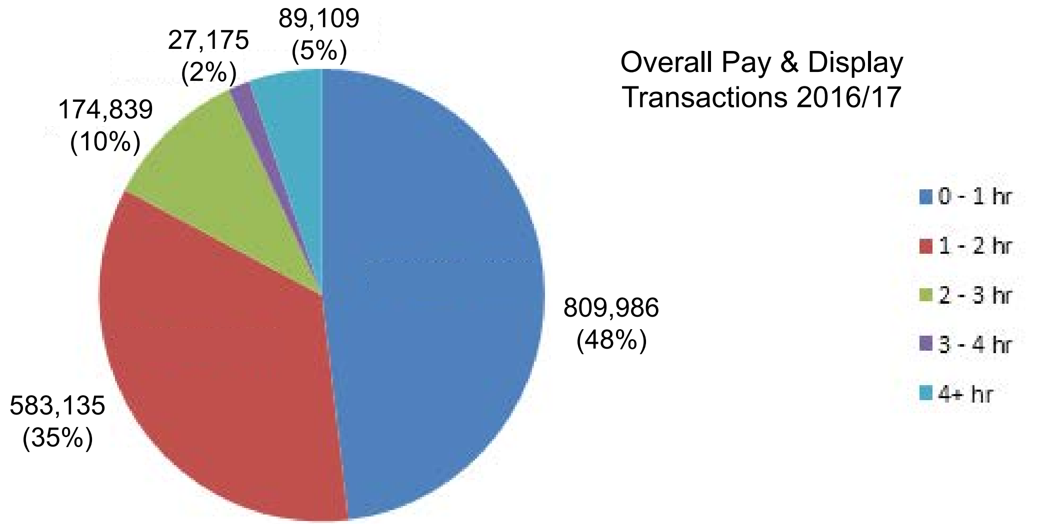



## Parking

The Council's contacts with the business community indicate that the lack of car, van and lorry parking in the District could be having a detrimental impact on economic growth.  This is particularly the case for companies in the District that employ large numbers of staff.  Anecdotally this is also an issue for businesses that are based in the centres and our towns or on the Victoria Business Park in Burgess Hill.

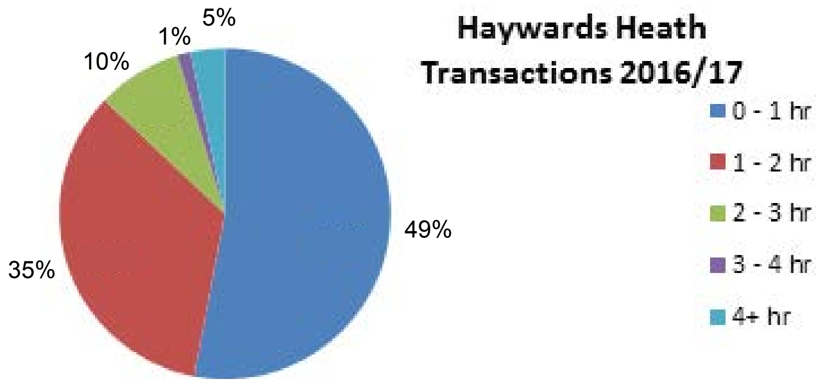
The Council has 20 town centre car parks operated by pay and display and providing a total of 2,071 chargeable spaces.  The Council Parking Strategy refers to the role of car parking to support the local economy, local businesses and town centre vitality through the provision of a quality service.

In 2016/17 there were a total of 1,684,244 pay and display transactions in the Council's town centre car parks, which is a 2 per cent increase on the previous year.  Of these transactions, 42 per cent were made in Haywards Heath, 31 per cent in East Grinstead and 26 per cent in Burgess Hill.   Analysis of their use showed that 83 per cent of the stays were for less than 2 hours.



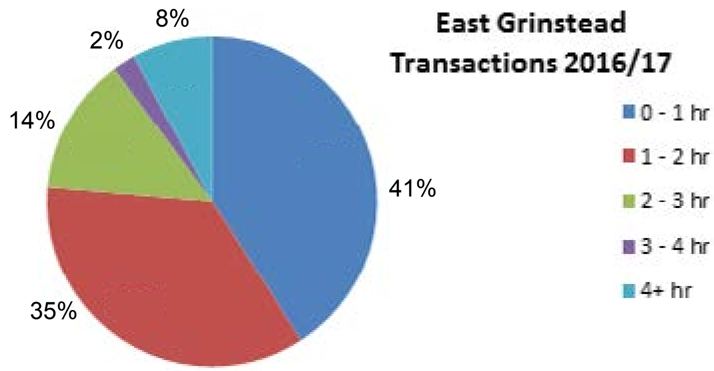

## Haywards Heath

There are eight pay and display car parks in Haywards Heath providing 598 spaces, the majority of which are designated short stay. A total of 709,697 pay and display transactions were made in 2016/17, a growth of 3 percent on the previous year. 87 per cent of overall transactions were for the 0-1 hour and 1-2 hours stay periods.



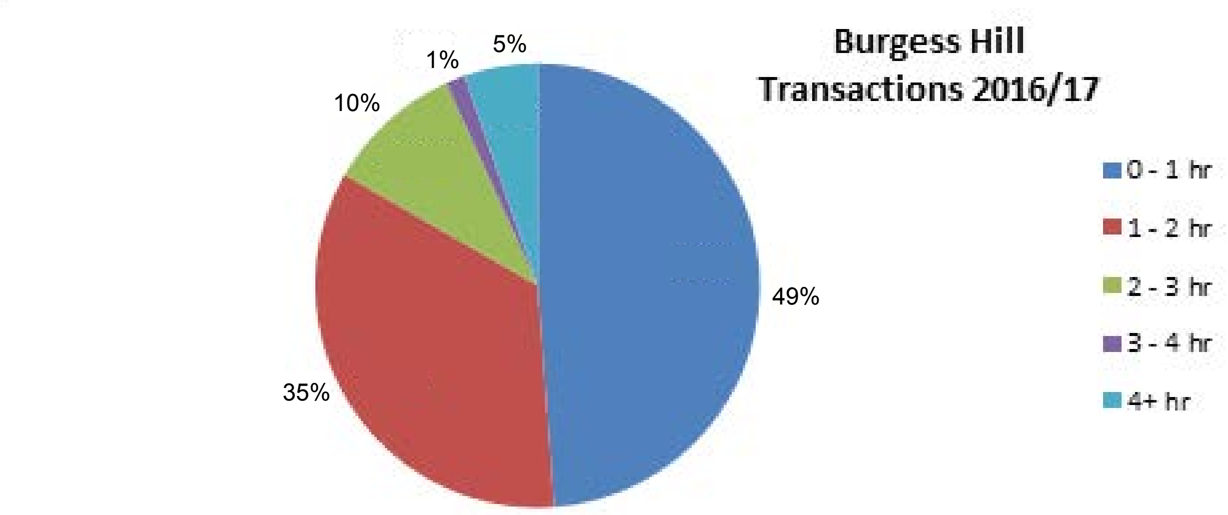

## East Grinstead

There are seven pay and display car parks in East Grinstead providing 675 spaces, with four short stay, two long stay and one combined long and short stay car park. A total of 529,972 pay and display transactions were made in 2016/17, a two per cent increase on the previous year. 76 per cent of transactions were for the 0-1 hour and 1-2 hours stay periods.




## Burgess Hill

There are five pay and display car parks in Burgess Hill providing 818 spaces - two long stay, two short stay and one combined long and short stay car park. A total of 444,575 pay and display transactions were made in Burgess Hill during 2016/17, a growth of 2 per cent on the previous year. 84 per cent of all transactions were made for the 0-1 hour and 1-2 hour stay periods. It should be noted that an additional 300 spaces are provided within the town by the Marketplace shopping centre, commonly known as the Waitrose car park, which are excluded from this analysis.




## Car parking issues in the business parks / town centre offices

The lack of available car parking is a key concern for the businesses with many indicating that this has impacted a recruitment and retention of staff as well as business expansion. A number of businesses are starting to explore development of Green Travel Plans for staff and have been exploring the potential for park and ride schemes.

Analysis of the use of Council car parks and the fact that 83 per cent of transactions were for less than 2 hours, will be used to inform the refresh of the parking strategy to ensure car parks are supporting the economic prosperity of each town centre.

## Housing

Mid Sussex has competitive Council Tax charges as shown by the 2017/18 figures below:

| Council Tax | Charges for a Band D property |
|---|---|
| Adur | £1,697.23 - £1,725.13 |
| Arun | £1,580.77 - £1,698.88 |
| Chichester | £1,560.31 - £1,675.48 |
| Crawley | £1,603.54 |
| Horsham | £1,565.68 - £1,645.54 |
| **Mid Sussex** | **£1,570.68 - £1,678.82** |
| Worthing | £1,577.03 - £1,634.14 |

The average house price in Mid Sussex for July 2016 was **£367,793.**

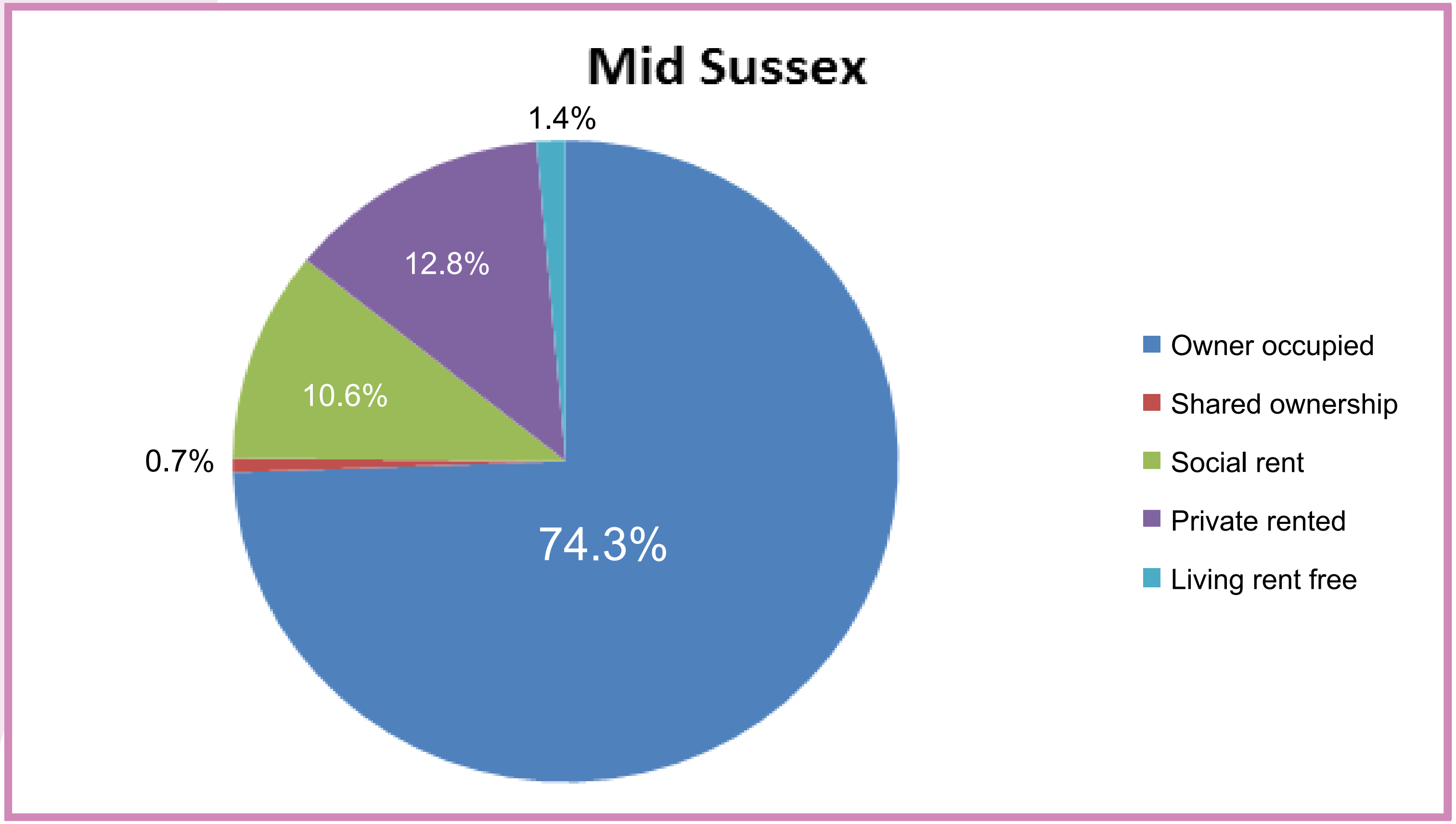
### Housing affordability

House prices are high in Mid Sussex compared with the average for West Sussex and the national average. Land Registry figures show that the average house price in Mid Sussex at July 2016 was £367,793, against the average for the South East of £313,315 and for West Sussex of £311,327. Average house prices in the District have increased by 44.5 percent in the period 2011-2016 The ratio of median house prices to median earnings in 2015 in Mid Sussex was 12, demonstrating issues with housing affordability, particularly for young people trying to get on to the housing ladder.

### Housing tenure

Mid Sussex has a higher level of privately owned homes than most of the country. This may be a reflection of higher than average salaries of residents of the district and the fact that there are many long-term residents. There has, however, been a large increase in the size of the private rented sector between the 2001 and 2011 Census, up from 8 per cent to 13 per cent. The percentage of owner occupation in Mid Sussex has decreased in this period from 79 per cent to 74 per cent.

| Tenure of households | Mid Sussex | West Sussex (%) | South East (%) | **England (%)** |
|---|---|---|---|---|
| Owner occupied | 42,658 (74.3%) | 70.6 | 67.6 | 63.4 |
| Shared ownership | 561 (0.7%) | 0.8 | 1.1 | 0.8 |
| Social rent | 6,092 (10.6%) | 12.8 | 13.7 | 17.7 |
| Private rented | 7,322 (12.8%) | 14.4 | 16.3 | 16.8 |
| Living rent free | 776 (1.4%) | 1.4 | 1.3 | 1.3 |
| Total number of households | 57,409 (100%) | 100.0 | 100.0 | 100.0 |




**Rural economy**

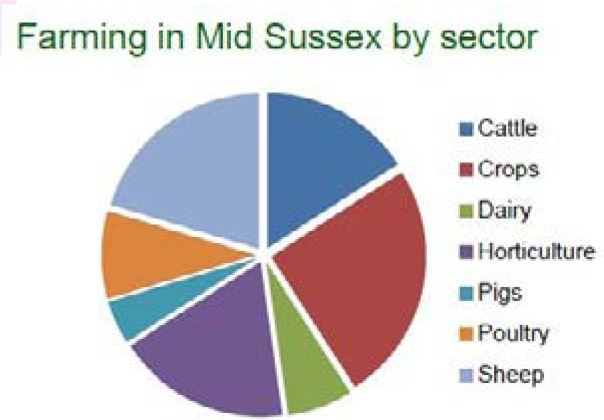
The Coast to Capital LEP produced a Rural Statement in 2016 in recognition that the rural economy is a significant contributor to the Coast to Capital's prosperity.

In Mid Sussex 29.18 per cent of businesses are based in rural locations which is just above the national average of 26 per cent.

| Coast to Capital Local Authority District | % of rurally based business |
|---|---:|
| Horsham | 71.50 |
| Lewes | 35.51 |
| Mid Sussex | 29.18 |
| Crawley | 1.51 |
| Brighton and Hove | 0.41 |

The rural business population is sectorally diverse in the Coast the Capital LEP area and includes agricultural and forestry; wholesale and retail trade and repair of motor vehicles; professional, scientific and technical services; construction; and tourism. Home based businesses arean important feature of the rural economy however these are generally characterised as being small.

The National Farmers Union has provided a detailed breakdown of farming in Mid Sussex by sector




Viticulture is a significant business in Mid Sussex with a growing number of successful and renown wine growers in the area including the award winning Bolney Wine Estate.

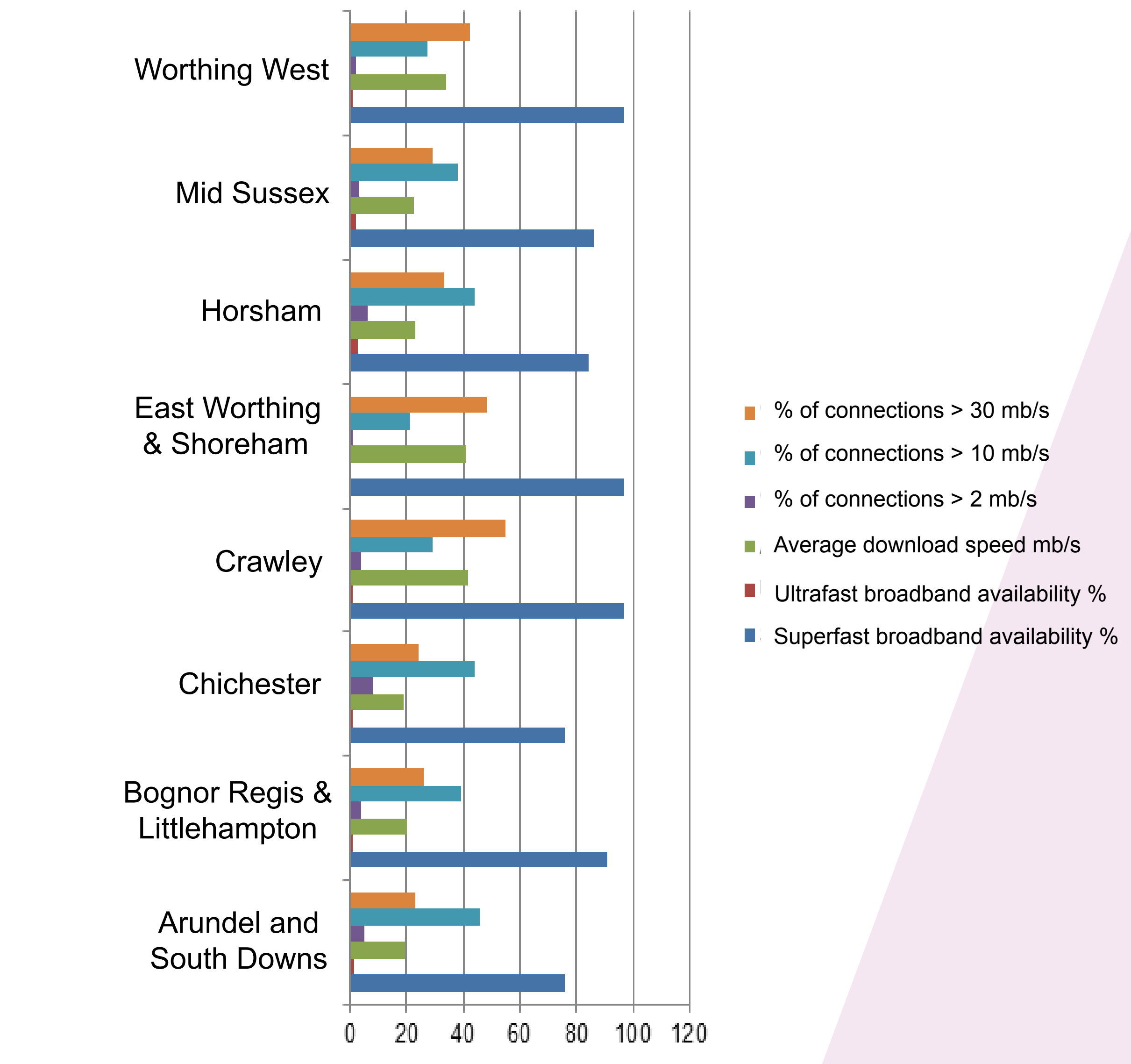
Key challenges identified and being addressed at a local and sub-regional level for the rural economy include:

- access to communication technology including poor broadband speeds
- transport infrastructure
- access to skills and labour
- housing affordability.

## Infrastructure

### Broadband

The figures in the adjoining table refer to superfast availability and broadband speeds to local BT telecommunications boxes. Many businesses in the District do not actually receive these speeds to their premises since they are connected to a box via copper wires which are sometimes many miles long. This particularly applies to rural businesses. Current figures suggest that 29 per cent of businesses in Mid Sussex are rurally based and are often receiving broadband speeds as low as 2Mb/s. West Sussex County Council in partnership with BT Open Reach has been rolling out superfast broadband across the County for some years. The rural parts of the County have, for population density reasons had a lower priority.



**Broadband speeds**

The percentage with superfast broadband available in Mid Sussex is at the average level for the South East of 86 per cent, but average download speeds at 22.2Mb/s are lower than the South East average of 30.2Mb/s.

Slow broadband speeds and mobile "not spots" in rural locations act as a constraint to economic growth. Many businesses have taken affordable, adequate premises in a rural environment when they do not need to be based in a commercial area. This is particularly true of web based and general IT companies. However, the number of premises that could be used is very restricted across the District because of poor broadband speeds to the premises. This situation restricts the growth of the rural economy and prevents the use of many premises which could be used for growing businesses. Areas with intermittent or no mobile phone reception ("not spots") still exist across the District.

**Transport**

All three town centres have either benefited from recent investment in transport infrastructure or funding has been secured for future investment. The East Grinstead and Haywards Heath train stations have been upgraded and provided with addional parking. £16.96m has been secured from Local Growth Funds to upgrade the A2300 in Burgess Hill with a futher £14.9m secured for infrastructure improvements, the majority of which will support a comprehensive sustainable transport package. A comprehensive transport study assessing measures to improve traffic flow around Haywards Heath has led to the prioritisation of projects to be delivered with Section 106 funds.

## Protecting and enhancing the District's built and natural environment

The Mid Sussex area has 36 designated conservation areas. Once a conservation area is designated the Council is required by the legislation to preserve or enhance the character of the area and development proposals have to be considered in light of this requirement.

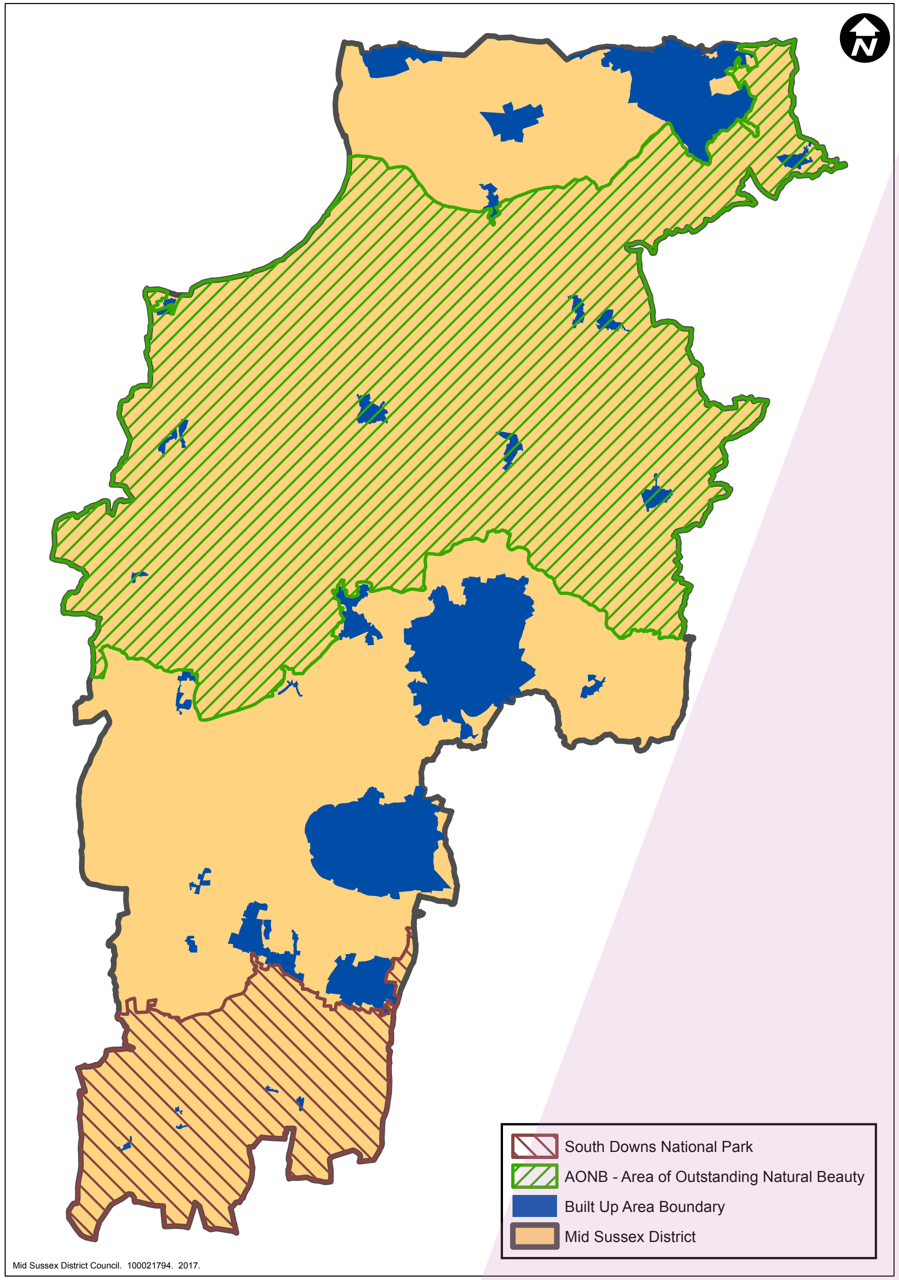
- There are also 1,040 listed buildings within the District of which 18 are the highest grade (Grade I) which are considered to be of exceptional importance, along with 10 Registered Parks and Gardens in the District.

Mid Sussex District has a high quality natural environment and around 60 per cent of the District is covered by protected landscape designations. Nearly 50 per cent of the District is within the High Weald Area of Outstanding Natural Beauty (AONB) and just over 10 per cent is within the South Downs National Park. In addition the Ashdown Forest lies adjacent to the North East boundary of the District.

The High Weald AONB is a mediaeval landscape characterised by dispersed settlements, historic routeways, ancient woodland, open heaths and small irregular-shaped fields.

The South Downs National Park has rolling chalk downland with a steep north-facing scarp dropping down to the Low Weald landscape. The chalk grassland is a valuable habitat and the area is popular for walking and cycling. The South Downs National Park Authority is the local planning authority for the National Park area.

Mid Sussex District also has a variety of nature conservation sites including thirteen Sites of Special Scientific Interest (SSSI) and six Local Nature Reserves which are important for biodiversity. Mid Sussex is the tenth most wooded district in the South-East and two-thirds of its woodland is classed as ancient woodland.



# Premises

Having assessed the data around availability of premises the following key issues have emerged:

**Key findings:**

- There are a diverse range of businesses within Mid Sussex with 20 per cent in the professional, scientific and technical sector
- 7,305 businesses in the District and a high number of new businesses starting up each year - 905 business births in 2014
- There are better survival rates of businesses in Mid Sussex than the South East average.
- Mid Sussex is home to a number of major manufacturers, retailers and insurers and is also home to a number of leading science and technology companies, there are a high proportion of micro businesses (75 per cent) employing fewer than 5 people
- There is a reasonable supply of employment space (605,000 $m^2$ with 41 per cent industrial; 29 per cent distribution and warehousing; and 30 per cent office space)
- The stock is relatively old and there is some evidence of a lack of “grow on premises” for smaller businesses looking to expand
- The industrial and office rents are competitive compared to Crawley and Brighton and Hove however the rental values have increased over the last year
- There has been a significant loss of office floor space to residential conversions particularly in East Grinstead
- Allocated employment land in Mid Sussex must be brought to the market quickly in order to meet local need and reduce the risk of displacement of local businesses.

> **"There is real potential for growth amongst both SMEs and large business, but we need to have modern and competitive premises for them to grow into."**


**Representives from the Business Associations for Haywards Heath, Burgess Hill & East Grinstead**


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

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

## Size of businesses in Mid Sussex

Mid Sussex has a number of major manufacturers, retailers and insurers as well as many smaller businesses.  The table on the next page shows the variety of sizes of businesses in the local area.  Mid Sussex has a higher proportion of micro businesses than most of West Sussex, with 75 per cent of businesses employing fewer than five people.  Many of Mid Sussex's businesses are listed in the **Mid Sussex Business Directory** which can be found on the Council's website.  A number of the business parks are supported by active business associates. Details of these associations can be found at:

Burgess Hill Business Park Association **http://www.bhbpa.co.uk/**
East Grinstead Business Association  **http://www.egba.co.uk/**
and Haywards Heath Business Association **http://hhdba.com/home/**

There are also a number of smaller industrial estates across the District.


### Size of businesses by employment

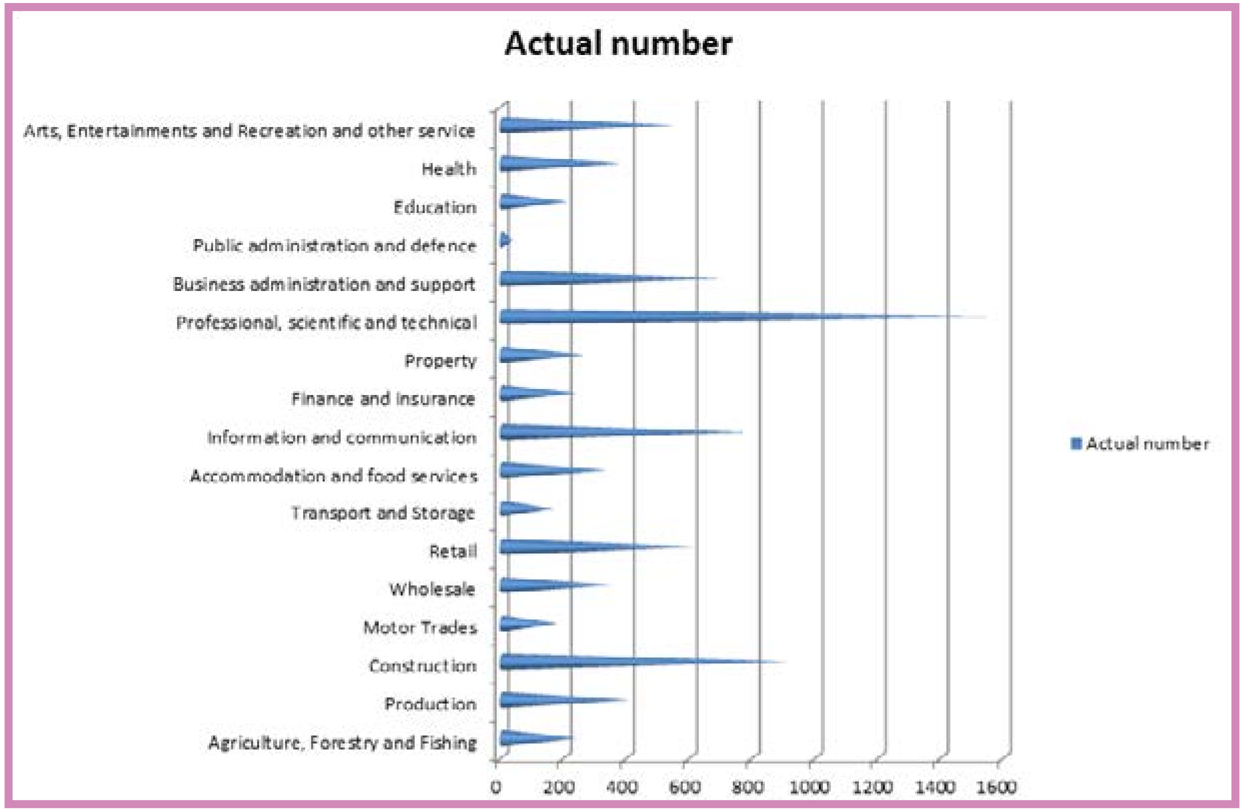
| Employment Size | 0-4 | 5-9 | 10-19 | 20-49 | 50-99 | 100-249 | 250+ | Total |
|---|---|---|---|---|---|---|---|---|
| Adur | 1,860 | 350 | 190 | 125 | 40 | 15 | 5 | 2,585 |
| Arun | 4,225 | 855 | 480 | 305 | 70 | 40 | 10 | 5,985 |
| Chichester | 5,395 | 960 | 520 | 335 | 85 | 50 | 25 | 7,370 |
| Crawley | 2,710 | 600 | 455 | 310 | 150 | 100 | 55 | 4,380 |
| Horsham | 6,090 | 990 | 505 | 340 | 105 | 35 | 15 | 8,080 |
| **Mid Sussex** | **5,960** | **965** | **565** | **320** | **95** | **60** | **15** | **7,980** |
| West Sussex | 29,360 | 5,320 | 3,080 | 1,975 | 635 | 340 | 140 | 40,850 |
| South East | 329,810 | 55,945 | 33,080 | 21,295 | 7,015 | 3,945 | 1,615 | 452,705 |

Source: ONS 2016 UKBABa Enterprise/local units by employment size band and local authority

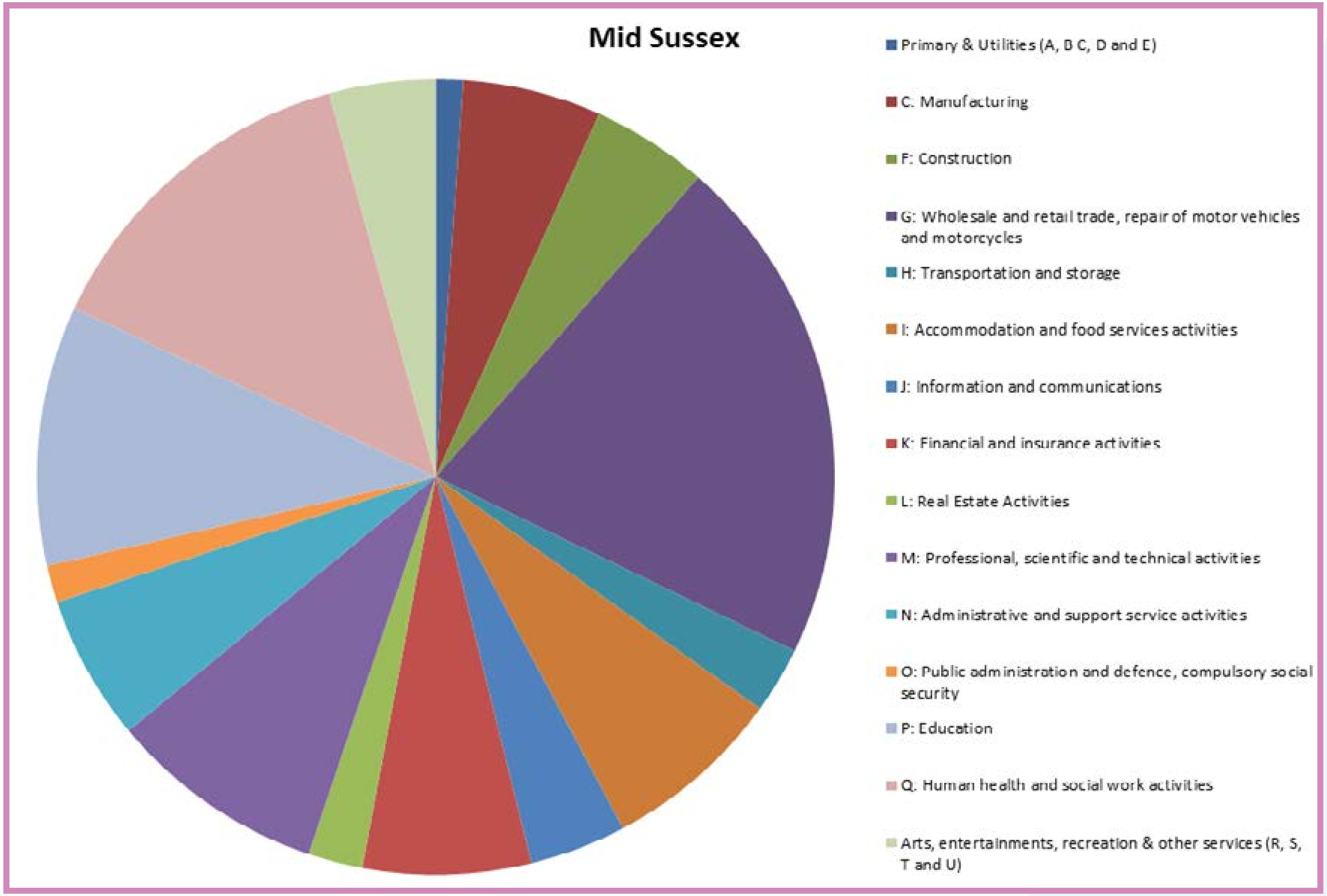

## Diverse and specialised sectors

Mid Sussex is home to a diverse range of businesses as shown in the chart below. The largest sector in Mid Sussex is the professional, scientific and technical sector at 20 per cent. Information and communication enterprises account for 10 per cent of all enterprises in Mid Sussex. Both of these sectors require employees with technical skills.

### Breakdown of Mid Sussex business by industry group 2016








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

## Biggest commercial employers in Mid Sussex

| | |
|---|---|
| American Express Europe | Flowserve |
| 1st Central Insurance | Rockwell Collins |
| Alexander Rose | CAE |
| The Caravan Club | Serco |
| Roche Diagnostics | Servecorp |
| AV Trade | Accelerated Mail and Marketing |
| HPC Compressed Air Systems | Edwards |
| Thermo Fisher Scientific | International Logistics Group |


Mid Sussex has a record of being a resilient economy with a large number of active businesses and a high survival rate for new enterprises.

**Active Businesses**

| Active businesses | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---|---|---|---|---|---|---|
| Adur | 2,290 | 2,320 | 2,255 | 2,275 | 2,340 | 2,390 |
| Arun | 5,345 | 5,290 | 5,260 | 5,225 | 5,205 | 5,320 |
| Chichester | 6,295 | 6,310 | 6,240 | 6,255 | 6,300 | 6,390 |
| Crawley | 2,970 | 2,960 | 3,015 | 3,100 | 3,215 | 3,380 |
| Horsham | 6,965 | 6,875 | 6,810 | 6,860 | 7,065 | 7,365 |
| Mid Sussex | 6,820 | 6,865 | 6,910 | 6,990 | 7,065 | 7,305 |
| Worthing | 3,850 | 3,880 | 3,800 | 3,830 | 3,890 | 4,005 |

Source: ONS Business Demography 2009 - 2014

Mid Sussex has the second largest number of active businesses in West Sussex and the numbers have increased each year between 2009 and 2014.


## Current employment space in Mid Sussex

The current stock of employment (41 per cent) floorspace in Mid Sussex is 605,000 $m^2$ with much of the supply formed of industrial, distribution and warehousing space (29 per cent). The commercial office stock at that stage was 81,000 $m^2$, representing some 30 per cent of all employment floorspace in the District. The distribution of the District's office stock is primarily concentrated in Haywards Heath (31 per cent), Burgess Hill (25 per cent) and East Grinstead (24 per cent). The stock of industrial floorspace is concentrated around Burgess Hill (42 per cent) and the A273 corridor.

Analysis included in the Economic Growth Assessment 2014 (EGA) found that the stock was relatively old. 77 per cent of all commercial office space was built before 1980 (50 per cent before 1940), which is a greater proportion in than the wider South East region as a whole (65 per cent and 40 per cent respectively). For industrial space, 70 per cent is pre-1980s, slightly higher than the regional equivalent of 66 per cent. Mid Sussex vacancy levels are around 12 per cent of total stock. Industrial floorspace vacancy was recorded as 8 per cent in Burgess Hill. These levels of vacancy are considered normal for the market (10 per cent is usually considered a reasonable average vacancy level). As a consequence there is a shortage of high quality end accommodation for both offices and industrial uses. As such there is a risk that some businesses will move out of the local area.

The Strategic Economic Land Availability Assessment prepared in May 2016 assessed the quality of employment sites in the District. Approximately 35 per cent of the sites surveyed were rated as good, 57 per cent average and only 7 per cent of sites were rated as poor.

Permitted Development Legislation passed in 2013 allows owners of office buildings to convert them to residential use without the need to apply for planning consent. Since the value of a building is much greater as residential than it is as office space, the District has seen an accelerating loss of office space. East Grinstead has been the worst affected to date with Haywards Heath and Burgess Hill also affected.

The Basepoint Centre provides 2896 $m^2$ of high quality workspace and managed office to over 30 local businesses, and is located within walking distance to Haywards Heath Train Station. The Centre has been at full capacity shortly after opening and has a healthy waiting list which supports a gap in the market for a similar opportunity.

Mid Sussex's commercial property market centres around the District's three main towns of Haywards Heath, Burgess Hill and East Grinstead, totalling 70.5 hectares of employment land, each with a distinctive offer and character. Haywards Heath is the District's main office centre due in part to its connectivity strengths, and historic role as an important office destination. Demand for good quality modern office premises remain high although there is a need to improve the older stock so that it continues to be attractive to current business occupiers.

Burgess Hill has the largest and most established industrial space market and the new business parks, once developed will provide even further employment opportunities.

East Grinstead has a mixed employment offer although has suffered significant loss of office space through permitted development.

The EGA analysed the quality and suitability of existing employment locations and identifiedthat four of the District's business parks were identified as good quality sites:

- Victoria Business Parks (East and West) at Burgess Hill
- Birches Industrial Estate in East Grinstead
- Sheddingdean at Burgess Hill

## Future demand for employment space

The Quarter 1 2017 Stiles Harold Williams assessment of Industrial and Logistics for Burgess Hill and Haywards Heath reported a high level of take up of business premises in the year to date. This would have been significantly higher if more stock was available. They report an increasing number of local occupiers frustrated with the lack of available stock in Burgess Hill and Haywards Heath who are desperate to expand and are now having to consider other areas. For East Grinstead, business take up has been lower, attributed to the lack of available stock rather than a reduction in demand. The town also benefits from business demand coming from the Crawley market. Our contacts with the business community point to the lack of “grow on” premises in the District, with the worst impact on the 278m$^2$ – 929m$^2$ category.

The EGA noted that a lack of readily available land for new office and industrial development was beginning to divert enquiries outside of the District, as requirements cannot be met.

A survey conducted by the Burgess Hill Business Parks Association in September 2014 found that 74 per cent of the businesses that responded had grown in the previous 12 months whilst a significant number of businesses reported a need to move or expand their premises within the next 18 months. This survey identified that just under half (43 per cent) of business had experienced difficulties in finding suitable premises / sites to expand, upgrade or relocate within the local area. Just over half (51 per cent) of respondents were considering expanding premises in the next 5 - 10 years.

The EGA concluded that the Council should:

- Seek to promote new offices and encourage renewal of older office stock within the Burgess Hill town centre. The business parks proposed to the west of Burgess Hill should be delivered in order to provide additional space and scope for existing occupiers to expand and build new premises.

- Intensify existing building space at East Grinstead to reflect demand. The EGA acknowledges that the Park Road / Maypole Road office cluster has lost considerable office space to residential use, however, the London Road / Wood Street area, closer to the town centre and railway station, is a more logical area for retention of space.

- Support and encourage office uses in the town centre. Market feedback suggests that Haywards Heath is still a relatively popular location for office occupiers.
The stock of office space in Haywards Heath, the District's main office location, requires renewal of older legacy space originally designed for larger corporate occupiers in the 1980s to smaller, more modern and flexible accommodation that is better suited to the smaller businesses that are now locating in the town.

## Levels of industrial and office rents

The Northern West Sussex Economic Growth Assessment (2014) identified the highest levels of industrial and office rents in Crawley, although this varies depending upon the quality and age of premises. Rents in Mid Sussex offer a cost advantage to both Crawley and nearby areas such as Brighton & Hove, Guildford and Reigate.

**Industrial and office rents in Northern West Sussex and comparator locations 2014**

| Location | Industrial (£/sqft) | Offices (£/sqft) |
|---|---:|---:|
| Crawley - Manor Royal | 7 - 10 | 15 - 25 |
| Crawley - Town Centre / Three Bridges | 7 - 8 | 10 - 20 |
| Horsham | 6 - 8 | 10 - 15 |
| East Grinstead | 7 - 8 | 9 - 10 |
| Haywards Heath | n/a | 16 - 17 |
| Burgess Hill | 7 - 8 | 9 - 11 |
| Brighton & Hove | 10 - 12 | 10 - 20 |

Source: Northern West Sussex Economic Growth Assessment 2014

## Provision for start-up / small businesses

The Council recognises the importance of home based businesses, many of which are likely to have growth potential. The potential demand for start-up/small business space is often indicated by the proportion of the working-age population who identify their home as their primary place of work.

The most up to date data is from the 2011 Census, which showed that 13 per cent of residents worked from home in Mid Sussex compared to 8 per cent across the South East and 6.6 per cent across England and Wales.  There are several possible reasons for this shift towards home-working, which could include the opportunities from improved information infrastructure, increase in transport prices and employers become more flexible.  Also, a trend arising from the period of economic recession of the unemployed being driven into self-employment and some pre-existing small businesses moving out of commercial property sites and into the home as a cost-cutting measure.

Home-based businesses often seek more formalised employment space or access to business support facilities as they grow and expand. There is currently a scarcity of the Managed Workspace required for homebased businesses to have the opportunity to expand. In 2015, The Council, in partnership with West Sussex County Council and Basepoint, provided 33 new business starter units on the site of the old waste depot at Bridge Road in Haywards Heath.

The only other such operational facility in the District is Citibase in Burgess Hill, which offers 27 serviced offices for rent.

## Business births

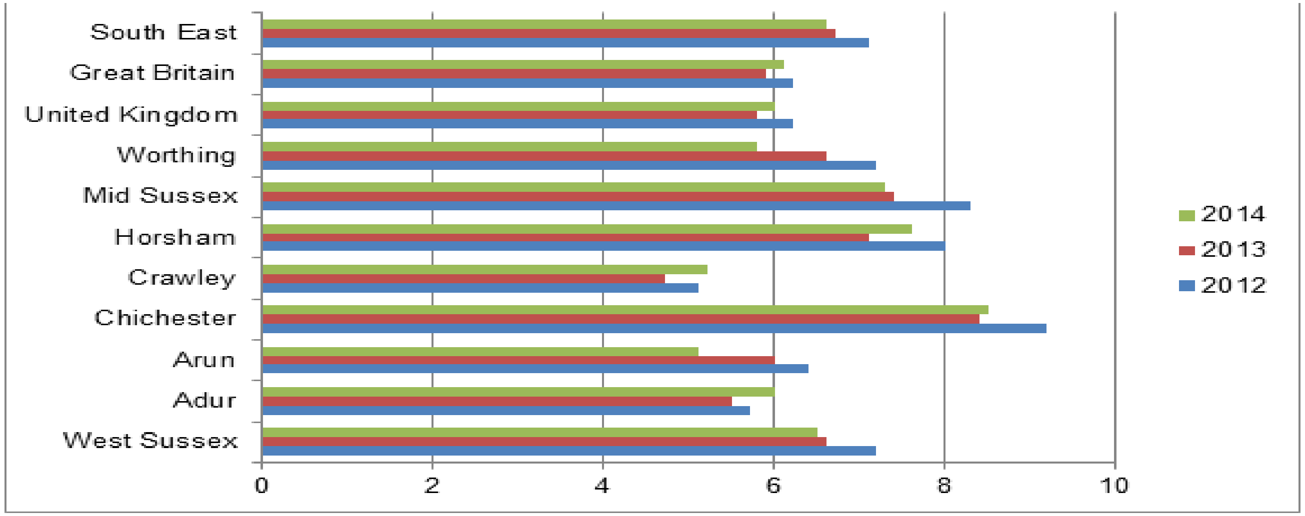
Mid Sussex has a high number of new businesses starting up each year. The District saw the largest increase in West Sussex of enterprise births between 2013 and 2014 at nine per cent. There were 905 enterprise births in 2014 in Mid Sussex, the highest number in the County.

**Enterprise birth rates (per 1,000 working age population (aged 16-64))**

| | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---|---|---|---|---|---|---|
| West Sussex | 6.6 | 6.5 | 7.0 | 7.0 | 8.8 | 8.7 |
| **Mid Sussex** | **7.3** | **7.6** | **8.1** | **8.0** | **9.5** | **10.3** |
| Great Britain | 5.9 | 5.8 | 6.5 | 6.7 | 8.6 | 8.7 |
| South East | 6.7 | 6.7 | 7.4 | 7.5 | 9.2 | 9.3 |

Source ONS Business Demography 2014 Headlines for West Sussex. WSCC Insight Team.

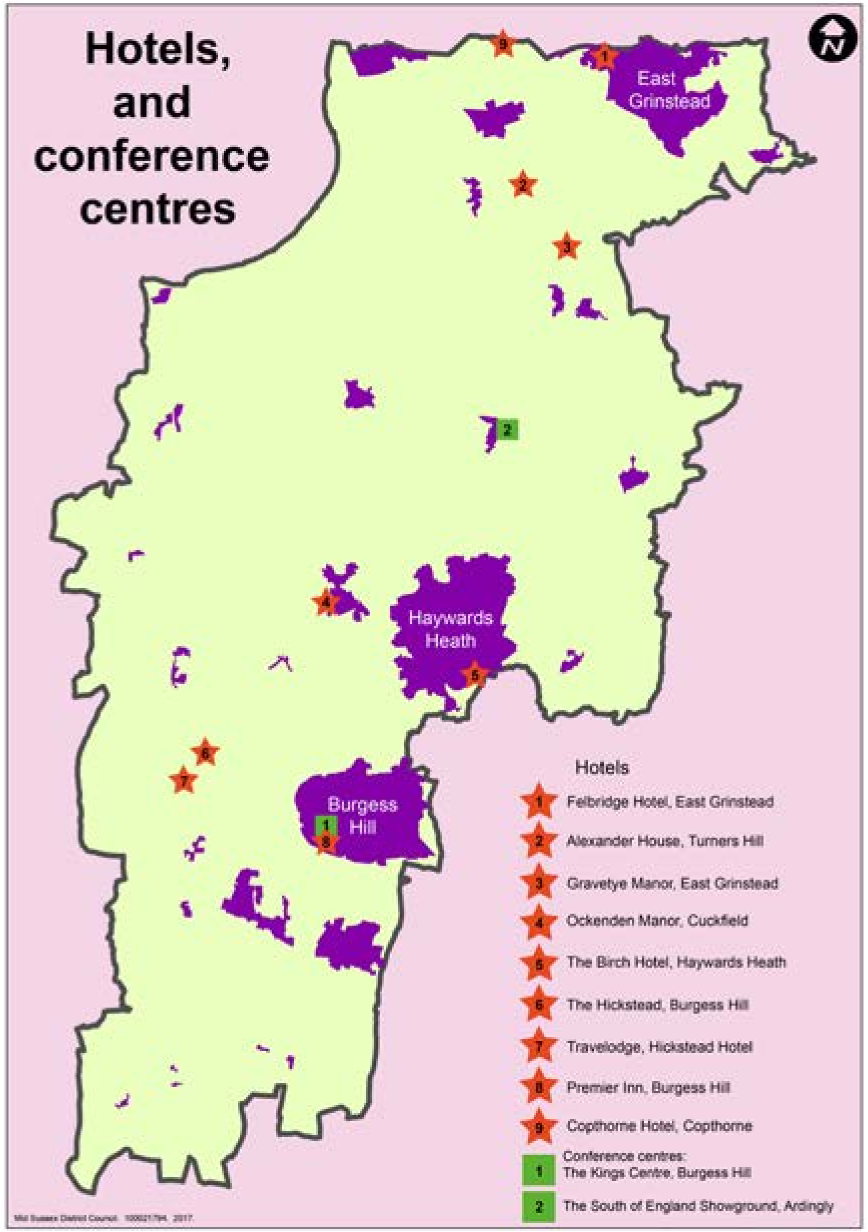
**Enterprise death rates (per 1,000 working population, aged 16-64)**




### 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
- 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 per cent.
- There are relatively high levels of commuting - 44 per cent commute out of the District and 33 per cent 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 per cent of those aged 16-64 possessing a degree or equivalent.
- Nearly 58 per cent 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 low 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 per cent 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.

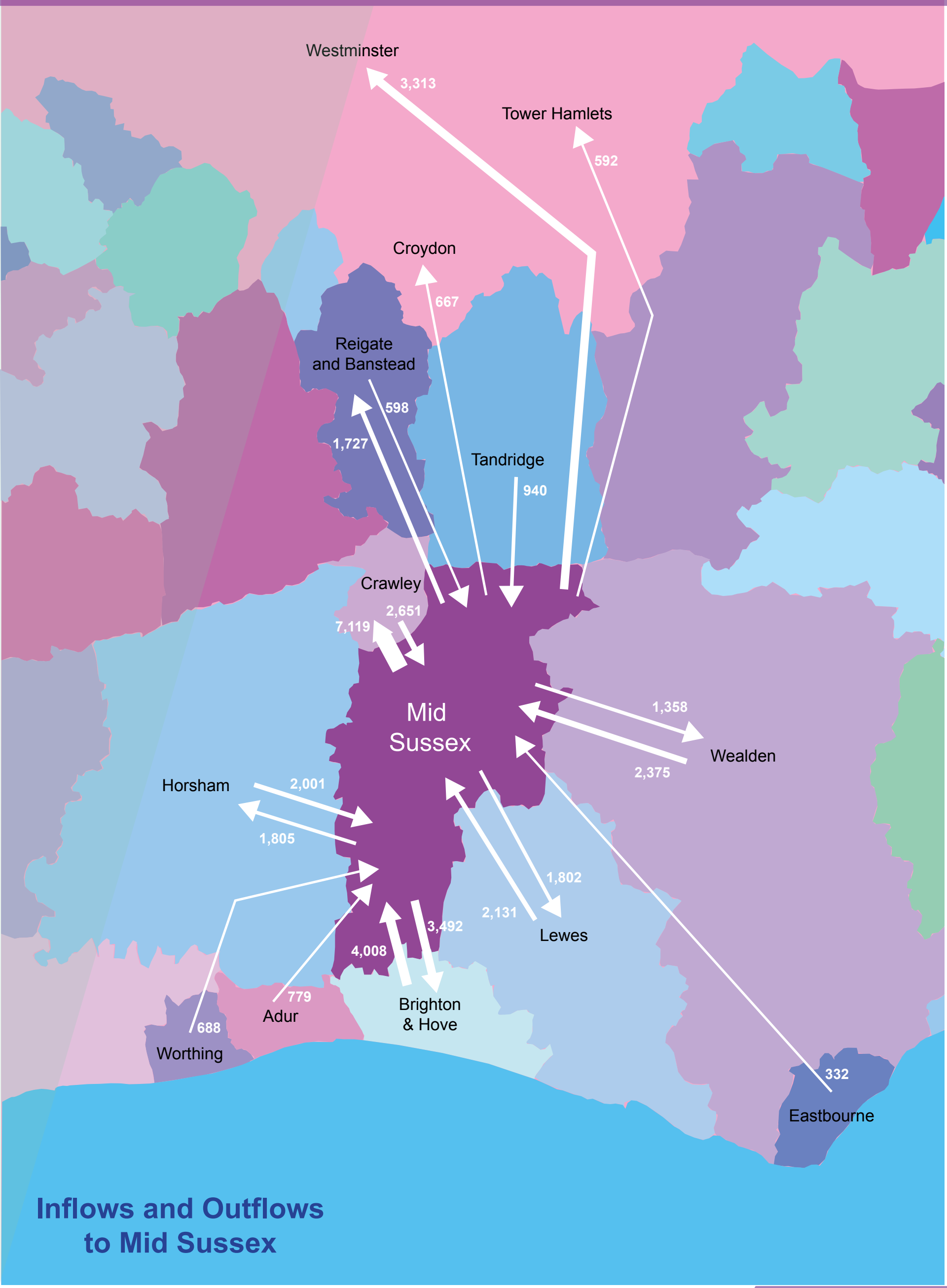
| Population aged 16 - 64 | Mid Sussex (Number) | Mid Sussex (%) | South East (%) |
|---|---|---|---|
| All people aged 16 - 64 | 88,400 | 61 | 62 |
| Males aged 16 - 64 | 43,700 | 61 | 63 |
| Females 16 - 64 | 44,700 | 60 | 61 |

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




Inflows and Outflows to Mid Sussex

## 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 per cent of the 16-64 year old population of the District. There are around 73,000 people in the District in employment. Around 44 per cent of residents (31,745 at 2011) commute out of the District and over 33 per cent 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.

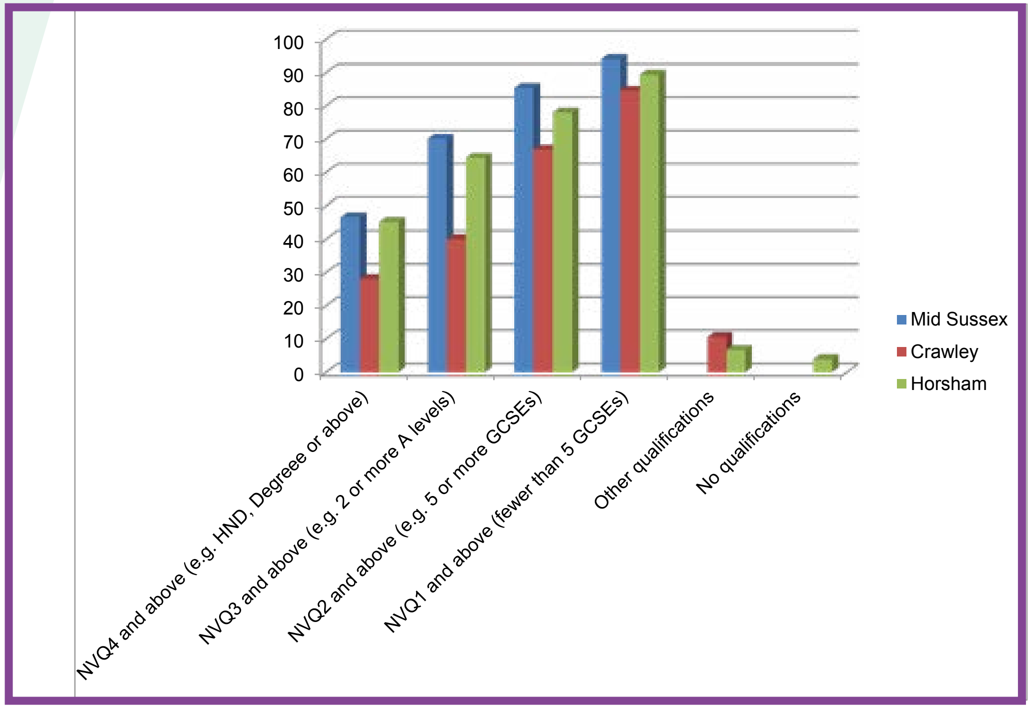
| | % 2011 Census |
|---|---|
| % who live and work in the District | 48 |
| Work mainly at home | 13 |
| Commute within the area | 35 |
| Travel to work by private vehicle | 67 |
| Travel to work by public transport | 5 |
| Travel to work on foot or cycle | 28 |

## 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 per cent 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 per cent.

### Educational standards

Mid Sussex has a highly educated workforce, with 46.6 per cent of those aged 16-64 possessing a degree or equivalent qualification and 70.2 per cent with 2 or more "A" levels. Both are the highest in West Sussex and above the averages for the South East of 39.8 per cent and 60.4 per cent respectively.



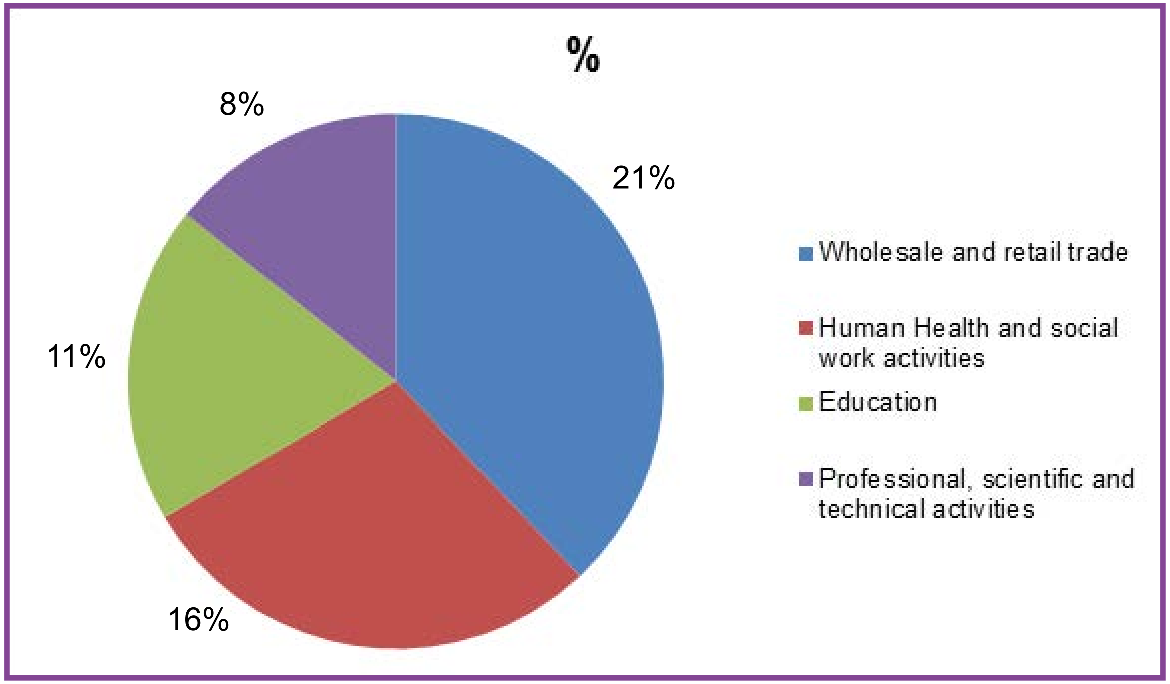


There were 56,800 employees working in Mid Sussex in 2015, 49,100 (87 per cent) working in the private sector. Mid Sussex is in line with the West Sussex average, and has a higher proportion of private sector employees compared to England as a whole (83 per cent).

Two thirds (66 per cent) of local employees in Mid Sussex work full-time and 34 per cent work part-time, which is in line with the West Sussex average. In England as a whole 69 per cent are full-time and 31 per cent part-time. Four sectors account for over half (56 per cent) 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%) |

Note: Percentages may not sum to total due to rounding





## 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 per cent 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 per cent and West Sussex of 47 per cent.**

### 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 | 1.0 | 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 | 2.0 | 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 | 351,400 |
| Public Sector % Share | 14 | 13 | 16 | 9 | 10 | **13** | 24 | 14 |
| Private Sector % Share | 86 | 87 | 84 | 91 | 90 | **87** | 76 | 86 |

Source: 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 | £486 | £540 | £545 | £628 | **£616** | £522 |
| Male Full-time workers | £604 | £555 | £599 | £593 | £730 | **£673** | £522 |
| Female Full-time workers | £444 | £378 | £477 | £498 | £460 | **£511** | £472 |

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 | £407 | £420 | £481 | £598 | £528 | **£538** | £489 |
| Male full-time workers | £464 | £463 | £498 | £669 | £544 | **£558** | £545 |
| Female full-time workers | £397 | £387 | £427 | £480 | £454 | **£471** | £419 |

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.

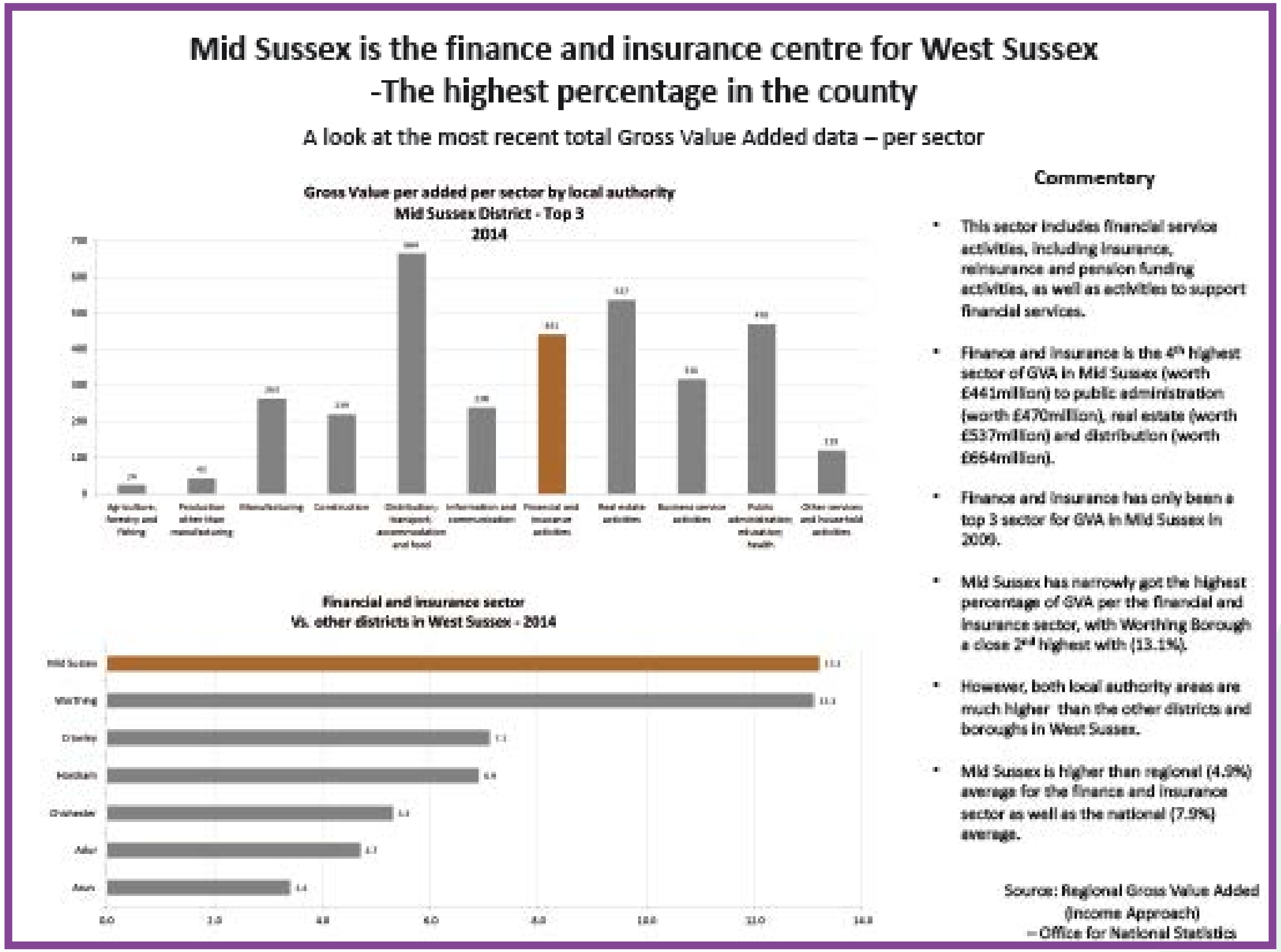
KIBs jobs tend to be higher skilled, better paid jobs. The table below shows KIBs jobs against the total number of jobs in Mid Sussex and other local authority areas in the Gatwick Diamond.

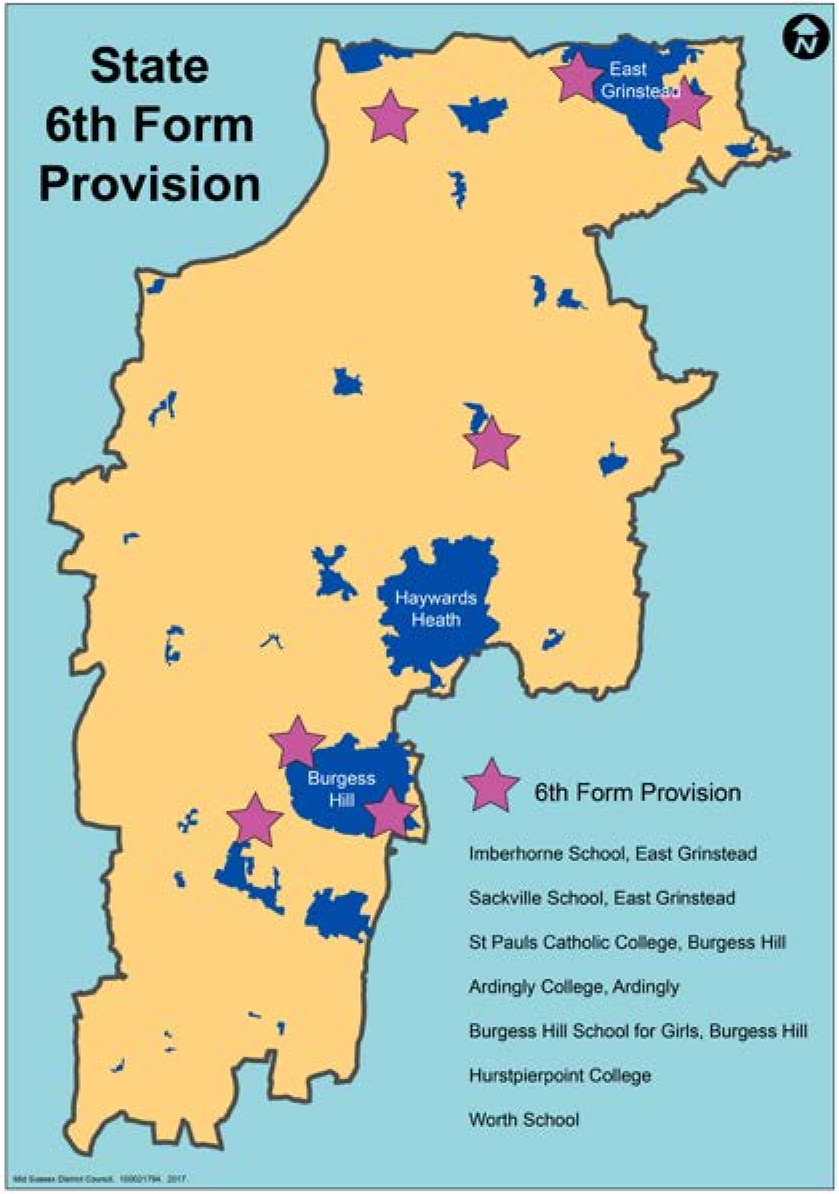
| Gatwick Diamond Local Authority | KIBS jobs | Total jobs | KIBS as a share of total |
|---|---:|---:|---:|
| Epsom and Ewell | 7,900 | 32,200 | 24.5% |
| Mole Valley | 14,600 | 46,700 | 31.3% |
| Reigate and Banstead | 17,300 | 67,700 | 25.6% |
| Tandridge | 4,900 | 33,100 | 14.8% |
| Crawley | 10,700 | 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 (GVA) 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.

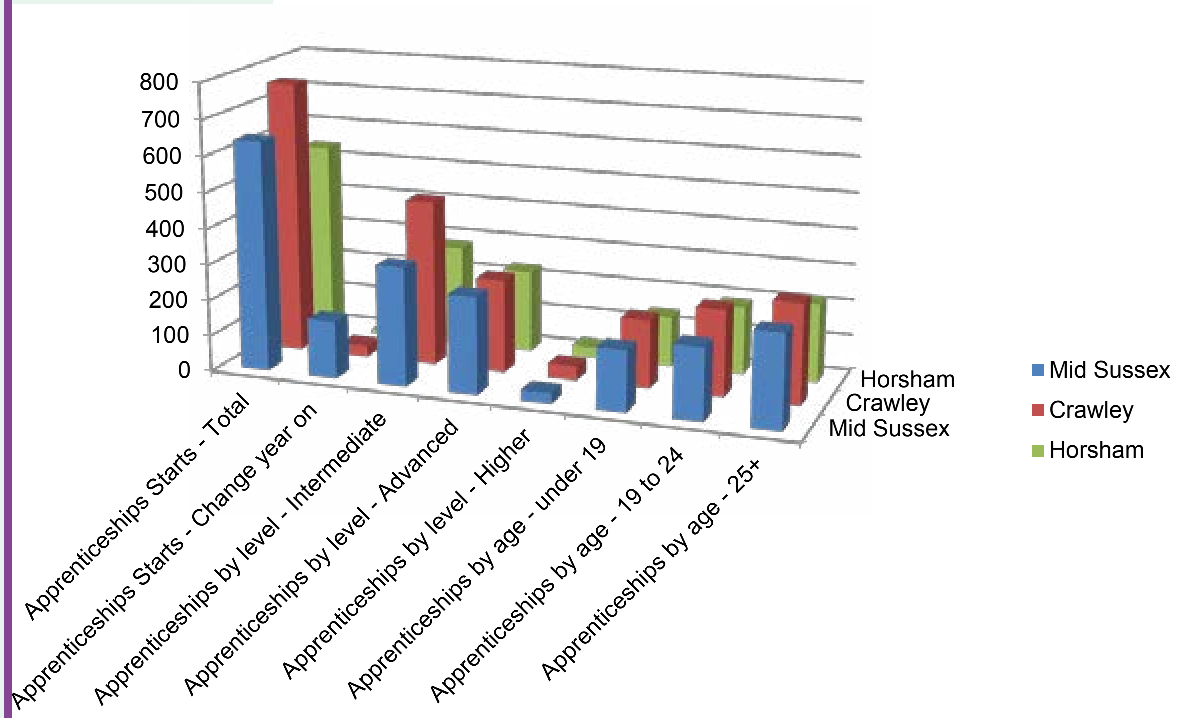
The closure of Central Sussex College has removed the only specialist state 6th Form College in the District with access to state 6th Form now limited to that provided in secondary schools.

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

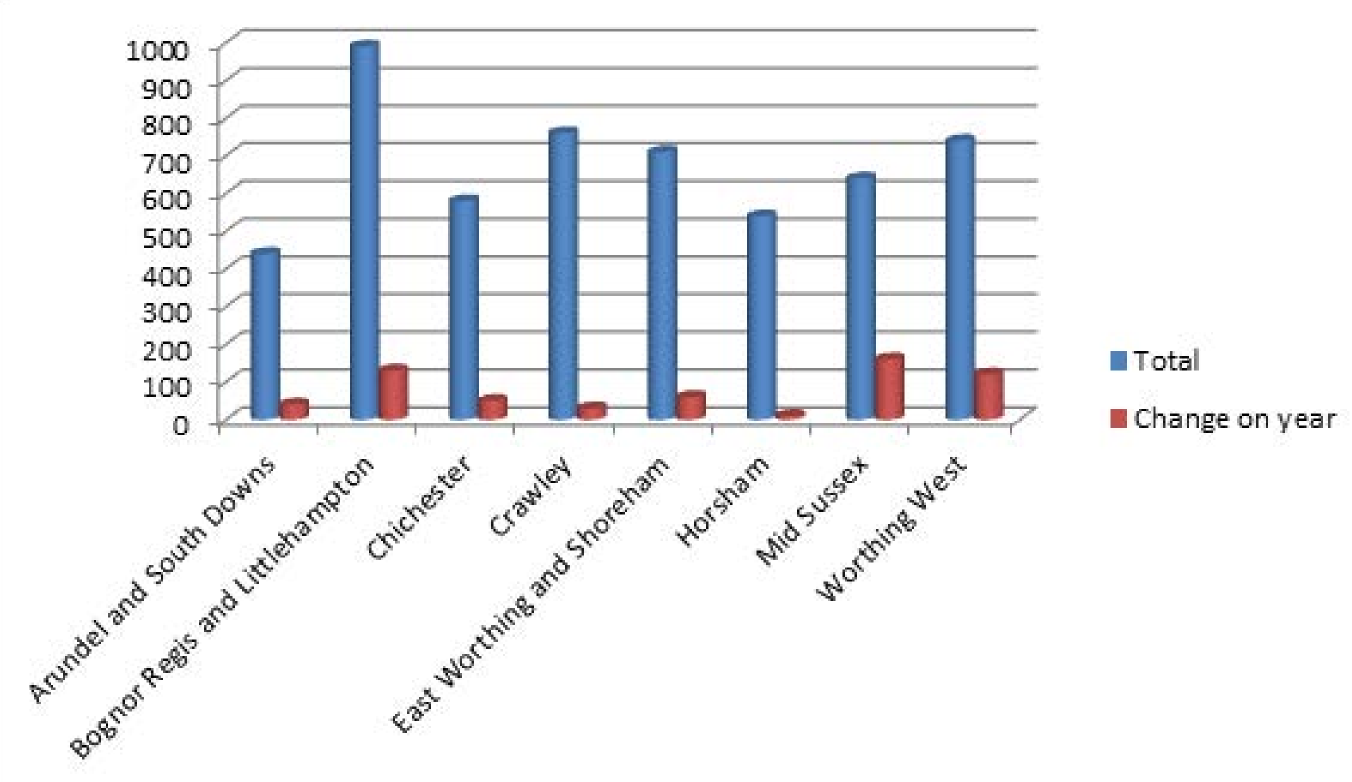
### Apprenticeships starts in 2014/15 by Parliamentary constituency




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

# 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.

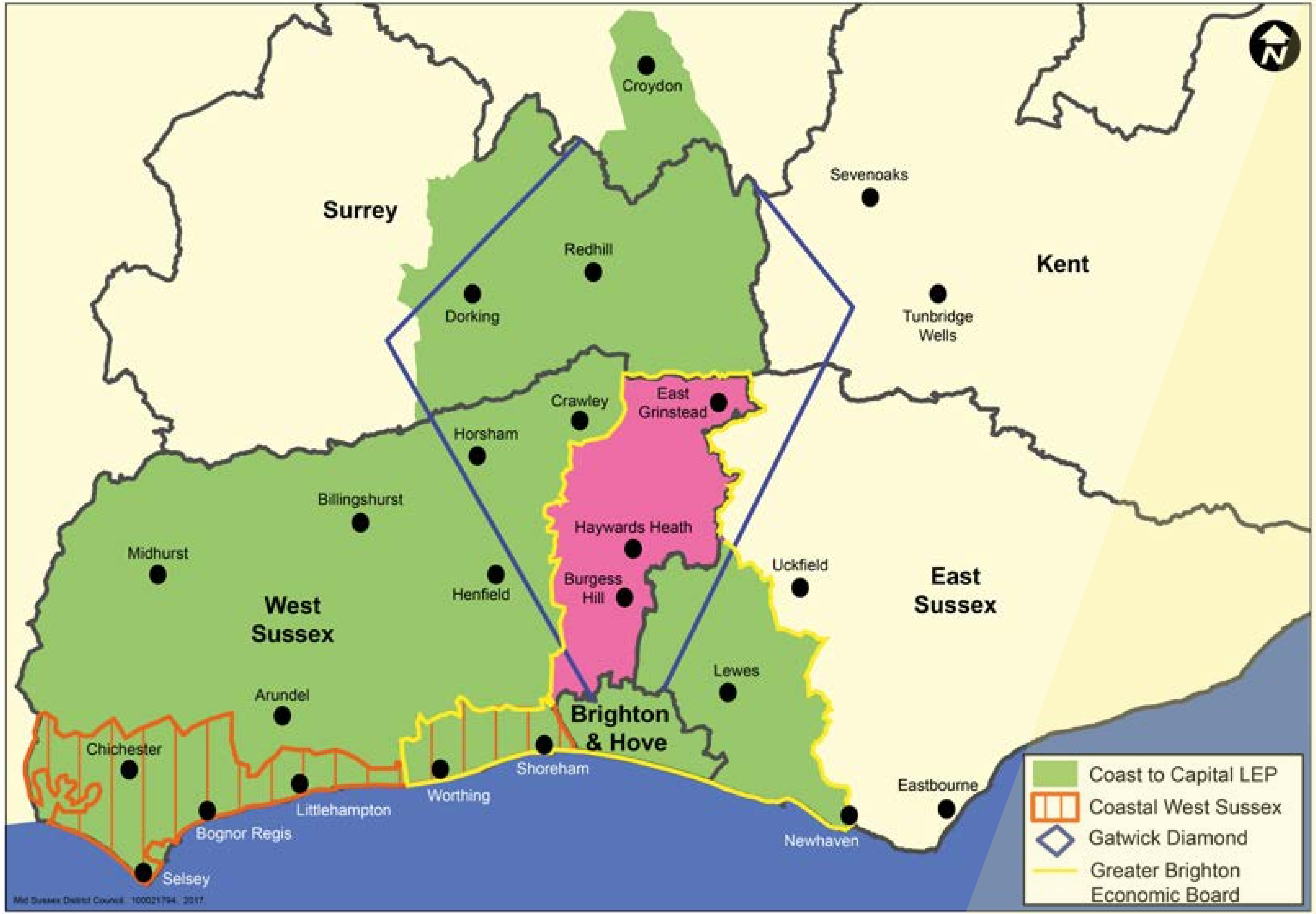
Together with Crawley and Horsham, Mid Sussex is part of the North West Sussex functional economic area and are an important part of the Coast to Capital Local Enterprise Partnership (LEP) area and Gatwick Diamond.

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

**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 per cent of the total jobs in the District.

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

- We financially 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.





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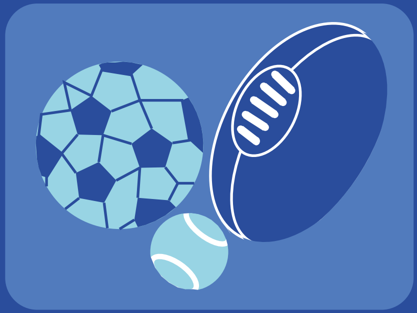
# Strengths

## Place

Low levels of crime



High quality of life with excellent recreational amenities

Desirable place to live in an outstanding location with good connectivity

## Premises

Resilient local economy with high survival rates for new enterprises

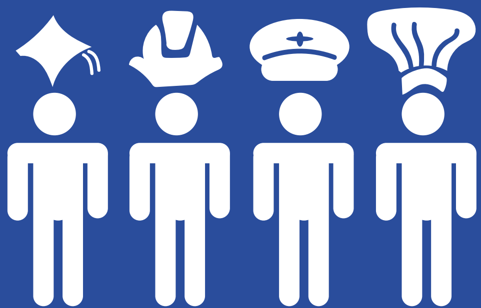
Healthy business economy with a large number of active businesses and start-ups

Diverse local economy and home for creativity

## People

High levels of employment

Highly skilled and well educated population



# Drivers

## Place

Slow broadband speeds and mobile “not spots” in rural areas

Lack of affordable housing

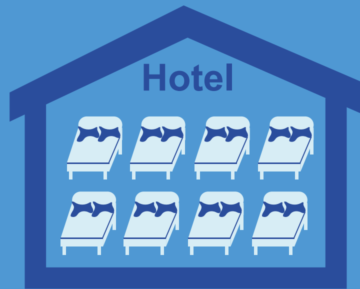
Investment required in the three main town shopping centres

## Premises

Lack of supply of “grow on” premises for expanding SMEs

Lack of hotel and conference facilities

Some outdated office space




Age of some of the existing employment stock

## People

Difficulty in recruiting technically qualified staff locally

Low average workplace earnings relative to resident earnings

Relatively high levels of in and out commuting

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MID SUSSEX
DISTRICT COUNCIL