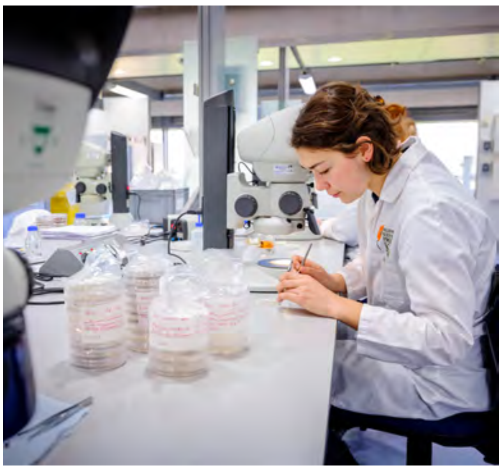
APPENDIX 2

MID SUSSEX DISTRICT COUNCIL

Sustainable Economic Strategy District Profile

2021 – 2022



About this Profile

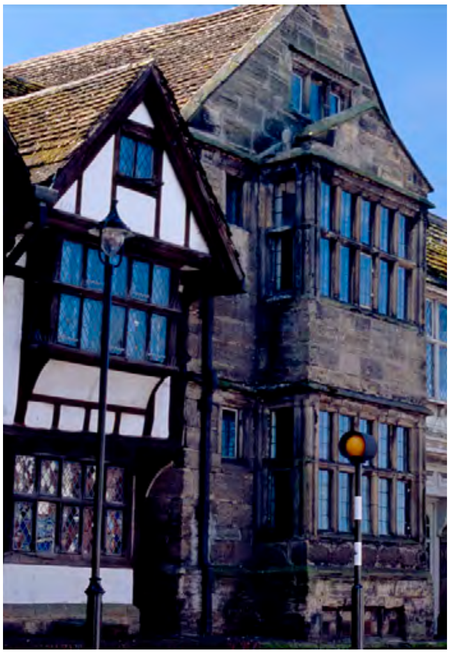
This District Profile provides a summary of key indicators for Mid Sussex. It draws on publicly available datasets and, where appropriate, compares Mid Sussex with West Sussex and England.

It has two main sections that are linked to the themes in the Sustainable Economy Strategy 2022- 2025: People and Place. It has been used to inform the associated Action Plan and to assist baselines and targets to monitor the impact of the supporting Action Plan.

About Mid Sussex

Mid Sussex is an affluent District in West Sussex in the South East of England with a total population of 152,000.

It covers an area of 33,400 Ha (129 square miles) and it has borders with Tandridge, Wealden, Lewes, Brighton & Hove, Horsham and Crawley. The majority of the District is well connected to the highway network and benefits from good railway linkages between London, Gatwick and the South Coast.



It has three main towns, Burgess Hill; East Grinstead; and Haywards Heath, together with a large number and wide variety of villages. However, the District is rural in character: nearly 50% of the District is within the High Weald Area of Outstanding Natural Beauty, and over 10% is within the South Downs National Park.

It also has many sites valued for their biodiversity including Sites of Special Scientific Interest, Sites of Nature Conservation Importance / Local Wildlife Sites, Local Nature Reserves and Biodiversity Opportunity Areas.

Sustainable Economy Strategy

This profile has been used to develop the Measures of Success set out in the Mid Sussex Sustainable Economy Strategy Action Plan. These are set out overleaf:

People Theme	
Strategic Objective	**Measure of Success**
Objective 1: **Maintain the high employment rate in Mid Sussex and reduce out-commuting amongst working age adults** UN Sustainable Goal 8 – Decent Work and Economic Growth	• Maintain employment rate above 78% in all quarters • Increase employment rate from 78% to 83% • Increase job density from 0.80 to 0.85 per working age resident • Increase Mid Sussex hourly workplace earnings from 87% to 93%
Objective 2: **Ensure local residents have the opportunity to acquire the necessary skills to secure good quality jobs** UN Sustainable Goal 4 – Quality Education UN Sustainable Goal 8 - Decent Work and Economic Growth	• Maintain Mid Sussex's position as the District with the highest proportion of working age residents in West Sussex with Level 4 and Level 3 or equivalent qualifications throughout the Strategy period
Objective 3: **Strive to reduce pay inequality and improve access to senior roles for under- represented groups in Mid Sussex** UN Sustainable Goal 10 – Reduced Inequalities UN Sustainable Goal 5 – Gender Equality	• Increase the proportion of Mid Sussex female working residents employed in Standard Occupational Classification (SOC) higher level occupations so that it equals the proportion of male residents in higher level occupations • Increase hourly female earnings from 95% to 100% of male hourly pay amongst workers in Mid Sussex by the end of the strategy period
Objective 4: **Improve the economic and social wellbeing of our residents.** UN Sustainable Goal 1 – No Poverty UN Sustainable Goal 2 – Zero Hunger UN Sustainable Goal 3 – Good Health and Well-Being UN Sustainable Goal 8 - Decent Work and Economic Growth	• Reduce the number of Lower-layer Super Output Areas that are in the top third of most deprived local areas in England by the Income domain from two to zero • Reduce the number of areas in Mid Sussex (LSOAs) that are in the top third of most deprived local areas in England by the Employment domain from one to zero • Maintain the Mid Sussex Life Satisfaction Score within the top two districts/ boroughs in West Sussex

Objective 5: **Encourage business start-ups, improve business survival rates and growth** UN Sustainable Goal 8 - Decent Work and Economic Growth UN Sustainable Goal 9 – Industry, Innovation and Infrastructure UN Sustainable Goal 12 – Responsible Consumption and Production UN Sustainable Goal 13 – Climate Action	• Maintain the business formation rate above 65 per 10,000 16+ residents • Increase the number of high growth enterprises from 25 to 30 • Increase 3-year business survival rate from 58.4% to 60.3% or above the West Sussex average by the end of the strategy period
Objective 6: **Promote the benefits of sustainability practices and encourage action to support achievement of Carbon Net Zero** UN Sustainable Goal 11 – Sustainable Cities and Communities UN Sustainable Goal 12 – Responsible Consumption and Production UN Sustainable Goal 13 – Climate Action	• Reduce CO2 emissions in-line with the council-only annual net-zero pathway target

Place Theme	
Strategic Objective	**Measure of Success**
Objective 7: Position and promote our town and village centres as healthier, greener and more sustainable places generating footfall, social interaction and economic activity UN Sustainable Goal 7 – Affordable and Clean Energy UN Sustainable Goal 8 - Decent Work and Economic Growth UN Sustainable Goal 11 – Sustainable Cities and Communities	• Increase the dwell time in the towns by 2% and maintain the average dwell time in the villages • Increase the proportion of adults who cycle or walk at least five times per week from 36.8% to 38.0% or above the West Sussex average by the end of the strategy period
Objective 8: Improve, manage and promote biodiversity and nature recovery UN Sustainable Goal 11 – Sustainable Cities and Communities UN Sustainable Goal 13 – Climate Action UN Sustainable Goal 15 – Life on land	• Biodiversity Net Gain secured through the planning system (% to be agreed through the District Plan Review)
Objective 9: Provide commercial and employment space to support new and growing businesses and to attract businesses to the district UN Sustainable Goal 8 - Decent Work and Economic Growth UN Sustainable Goal 9 – Industry, Innovation and infrastructure UN Sustainable Goal 11 – Sustainable Cities and Communities	• Deliver 10ha of additional employment land over the Strategy period • Commence delivery of 25,000sqm of specialist S&T floorspace by 2025 • Increase in the new firm formation rate (per 10,000 16+ residents) from 68.8% to 76.9% or above the England average at the end of the strategy period • Increase the proportion of knowledge-based economy businesses from 11.1% to 12.5% of the District's business stock • Increase the number of high growth businesses in the District from 20 to 30

Objective 10: Facilitate the design, delivery and use of sustainable infrastructure and services UN Sustainable Goal 11 – Sustainable Cities and Communities UN Sustainable Goal 12 – Responsible Consumption and production UN Sustainable Goal 13 – Climate Action	• Increase in EV charging points from 23.7 per 100,000 population to 38.8 per 100,000 population or above the England rate • Increase the number of LULEV registered vehicles from 1,234 (23.2% of the West Sussex total) to 25% of the West Sussex total
Objective 11: Deliver enhanced digital infrastructure and promote its use as a catalyst for growth and innovation across all sectors in the district UN Sustainable Goal 8 - Decent Work and Economic Growth UN Sustainable Goal 9 – Industry, Innovation and infrastructure UN Sustainable Goal 11 – Sustainable Cities and Communities	• Increase super and ultra-fast coverage from 37.5% of households to 60% • Increase maximum mean download speed from 400 Mbps to 475 Mbps or above the Southeast regional average at the end of the strategy period • Increase availability of dark fibre network connections and advanced digital infrastructure from existing zero base
Objective 12: Promote Mid Sussex's assets, ambitions and potential UN Sustainable Goal 8 - Decent Work and Economic Growth UN Sustainable Goal 9 – Industry, Innovation and infrastructure UN Sustainable Goal 11 – Sustainable Cities and Communities	• 50% increase in number of 2021/ 2022 direct Inward Investment enquiries to MSDC per year • Support the recovery of the Mid Sussex Tourism Economy to at or above pre-pandemic levels by 2023/24 and see growth above pre-pandemic levels by 2024/25

Objective 13: Reduction in Carbon Emissions **UN Sustainable Goal 11 – Sustainable Cities and Communities** UN Sustainable Goal 12 – Responsible Consumption and production UN Sustainable Goal 13 – Climate Action	• Reduce the carbon emissions of 20% of the districts most inefficient homes • 100% participation in applicable and available Green Home Grant schemes throughout the Strategy period • 100% of proposals for new build residential development to meet the sustainability rating policy requirement set out in the District Plan • 100% of proposals for major residential refurbishment and conversion to meet the sustainability rating policy requirement set out in the District Plan • 100% of proposals for new build non-residential development to meet the sustainability rating policy requirement set out in the District Plan • 100% of proposals for non-residential refurbishment and conversion (over 500 m2) to meet the sustainability rating policy requirement set out in the District Plan • Key business and 3rd Sector stakeholders in the District to have a net-zero carbon programme • The successful creation and implementation of a Mid Sussex Net-Zero Carbon Programme throughout the Strategy period

Partnership Theme	
Strategic Objective	**Measure of Success**
Objective 14: **Ensure that Mid Sussex is an exemplar district and Council in promoting effective partnership working to support sustainable economic development, combat the effect of climate change, increase biodiversity and promote health and well-being** UN Sustainable Goal 17 -Partnerships for the goals	• Mid Sussex District Council receives national recognition as an exemplar Local Authority, for example with a Local Government Chronicle award, in promoting and delivering sustainable economic development

Contents

People

Place

People

This section provides data and statistics on the **People** theme of the Sustainable Economy Strategy.

Key findings

- Mid Sussex has 152,000 residents, 60% of whom are of working age. 90% of the increase in the resident population over the next ten years is projected to be amongst people aged 65+ years[1].

- The District has a high proportion of economically active residents (79.8%[2]) and low levels of unemployment at 2.5 per cent[3].

- Mid Sussex scores well on most health indicators, but less well on road casualties and self-harm related hospital admissions.

- There are very low levels of deprivation, although geographical access to services is an issue in rural areas and there are pockets of skills deprivation amongst young people in each of the three main urban areas.

- There are relatively high levels of commuting into and out from the district – 35%[4] of the District's working residents commute out of the District and 23% of the District's workers commute into Mid Sussex to work. Males are more likely than females to be both in-commuters and out-commuters. Nearly 10,000 working residents work at, or mainly from, home and a further 5,800 have no fixed place of work.

- The resident population is highly educated with 52.6 per cent of those aged 16-64 possessing an NVQ 4+ qualification[5].

- Nearly 59% of residents work in Groups 1 – 3 of the Standard Occupational Classification as managers, senior officials, professional and technical occupations[6].

- Median earnings by residence of full-time workers who live in Mid Sussex of £617.50[7] are higher than median earnings by Mid Sussex workplace at £574.20[8].

- Full-time female workers earn 89% of full-time male workers hourly earnings, but female residents who work full-time outside the district only earn 83% of their male colleagues.

- There were 640 apprenticeship starts and 190 apprenticeship achievements by residents in the District in Q3 2019/20. 200 of the starts and 80 of the achievements were at intermediate level; 170 of the starts and 30 of the achievements were at Higher Level; and 270 of the starts and 90 of the achievements were at Advanced Level.[9]

1 Strategic Housing Market Assessment (October 2021)
2 Annual Population Survey; April 2020-March 2021; Office of National Statistics via NOMISWEB
3 Claimant count: as a proportion of 16-64 year olds; August 2021; Office for National Statistics via NOMISWEB
4 Census 2011; Office for National Statistics via NOMISWEB. In 2011 there were 57,341 residents in work, 25,400 of whom worked in Mid Sussex and a further 9,685 worked mainly from home.
5 Annual Population Survey; January 2020-December 2020; Office for National Statistics; via NOMISWEB
6 Annual Population Survey; April 2020-March 2021; Office for National Statistics; via NOMISWEB
7 Annual Survey of Hours and Earnings 2020 – Resident Analysis; Office for National Statistics; via NOMISWEB
8 Annual Survey of Hours and Earnings 2020 – Workplace Analysis; Office for National Statistics; via NOMISWEB
9 Apprenticeship Data Park for 2019/20; Department for Education

Population

- Mid Sussex has a total population of around 152,000 Burgess Hill has a population of 32,800; East Grinstead has a population of 26,900 and Haywards Heath has a population of 39,100[10].
- 20% of the District's population is aged 0-15 years; 60% is aged 16-64 years; and 20% aged 65+ years. Proportionately, it has a larger working age population than West Sussex, but a smaller one than England.
- The resident population is projected to grow by just over 7,500 by 2031. This is a 5% increase. Almost all (90%) of this is growth is projected to be amongst residents aged 65+.

2021						
Age	Mid Sussex		West Sussex		England	
	Count	Percent	Count	Percent	Count	Percent
Aged 0 to 15	30,012	19.6%	159,762	18.2%	10,913,822	19.2%
Aged 16 to 64	90,728	59.4%	512,718	58.4%	35,406,739	62.1%
Aged 65+	32,096	21.0%	205,422	23.4%	10,668,992	18.7%
All Ages	152,837	100.0%	877,911	100.0%	56,989,572	100.0%
2031						
Age	Mid Sussex		West Sussex		England	
	Count	Percent	Count	Percent	Count	Percent
Aged 0 to 15	28,972	18.1%	151,773	16.4%	10,387,050	17.5%
Aged 16 to 64	92,543	57.7%	523,606	56.4%	36,056,306	60.7%
Aged 65+	38,891	24.2%	252,391	27.2%	12,945,733	21.8%
All Ages	160,404	100.0%	927,768	100.0%	59,389,107	100.0%
2021- 2031						
	Mid Sussex		West Sussex		England	
	Count	Percent	Count	Percent	Count	Percent
Aged 0 to 15	-1,040	-3.5%	-7,989	-5.0%	-526,772	-4.8%
Aged 16 to 64	1,815	2.0%	10,888	2.1%	649,567	1.8%
Aged 65+	6,795	21.2%	46,969	22.9%	2,276,741	21.3%
All Ages	7,567	5.0%	49,857	5.7%	2,399,535	4.2%

10 Population estimates – small area based by single year of age – England & Wales (2020); Office for National Statistics via NOMISWEB

Health and Well-Being

Life Expectancy and Mortality

- Life expectancy at birth is 85.2 years for females and 81.5 years for males. For both males and females in Mid Sussex, life expectancy is higher than for West Sussex 84.2 years & 80.8 years; and England 83.2 years & 79.6 years). However, the gap between female and male life expectancy (+3.7 years) is higher than in both West Sussex (+3.4 years) and in England (3.6 years).
- Mid Sussex has better mortality rates for people under aged 75 years for all cancer, cardiovascular diseases and all causes.

	Males	Females	Difference
Mid Sussex	81.5	85.2	3.7
West Sussex	80.8	84.2	3.4
England	79.6	83.2	3.6
Adur	81.2	83.7	2.5
Arun	79.7	83.5	3.8
Chichester	81.1	84.8	3.7
Crawley	80.5	83.4	2.9
Horsham	82.5	85.1	2.6
Worthing	79	83.1	4.1

Source:https://fingertips.phe.org.uk/profile/healthprofiles/data#page/1/gid/1938132701/ati/201/iid/90366/age/1/sex/1/cat/-1/ctp/-1/yrr/3/cid/4/tbm/1

Life Satisfaction

- Since 2011/12, residents in Mid Sussex have, on average, had higher life satisfaction levels (7.85) than residents across West Sussex as a whole (7.76). Indeed, average life satisfaction in the county is higher only in Chichester (7.88).

- However, in 2019/20, there was a significant fall in life satisfaction in Mid Sussex (7.74) and in Chichester (7.54). Residents in these two areas were had lower levels of life satisfaction than residents in all the other districts/boroughs in West Sussex.

- Anxiety levels have also increased significantly, from a low score of 2.32 in 2013/14 to a high of 3.33 in 2019/20. Anxiety levels amongst Mid Sussex residents in 2019/20 were higher than in any other district/borough in West Sussex.

Life Satisfaction	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	Average
Mid Sussex	7.78	7.73	7.86	7.85	8.05	8.02	7.79	7.83	7.74	7.85
West Sussex	7.67	7.59	7.64	7.85	7.8	7.76	7.77	7.89	7.84	7.76
Adur	7.36	7.47	7.52	7.9	7.64	7.31	7.83	7.31	x	7.54
Arun	7.79	7.65	7.6	7.86	7.86	7.64	7.85	7.87	8.09	7.80
Chichester	8.16	7.63	7.75	7.94	7.55	8.17	8.05	8.1	7.54	7.88
Crawley	7.29	7.42	7.77	7.72	7.74	7.63	7.68	7.88	7.83	7.66
Horsham	7.7	7.81	7.47	7.94	8.14	7.66	7.52	8.1	7.92	7.81
Worthing	7.33	7.25	7.48	7.73	7.4	7.64	7.67	7.9	7.8	7.58

Source: Personal Well-Being Index, Office for National Statistics (2020)

Other Health Indicators

- Mid Sussex performs better than the England average on the following health indicators:
  - o Hospital admissions for alcohol specific conditions
  - o Smoking amongst residents aged 18+ years
  - o Percentage of adults who are overweight or obese
  - o Under 18 conception rates
  - o Breastfeeding initiation
  - o Obesity amongst Year 6 children
  - o Children in low income families
  - o New Sexually transmitted infection diagnoses
  - o Tuberculosis incidence
- Mid Sussex performs similar to the England average on the following health indicators:
  - o Suicide rate
  - o Hip fractures in people aged 65+ years
  - o Estimated dementia rate
  - o Admission episodes for alcohol-specific conditions - Under 18s
  - o Infant mortality rate
  - o Excess winter deaths index
- Mid Sussex performs worse than the England average on the following health indicators:
  - o People killed or seriously injured on roads
  - o Emergency hospital admissions for intentional self-harm
  - o Early cancer diagnosis
  - o Diabetes diagnosis rate

Mid Sussex					
	Age	**Time period**	**Value**	**Count**	**Compared to England value or percentiles**
Under 75 mortality rate from all causes	<75 yrs	2017 - 19	241*	1010	Better
Under 75 mortality rate from cancer	<75 yrs	2017 - 19	112*	472	Better
Under 75 mortality rate from all cardiovascular diseases	<75 yrs	2017 - 19	40*	167	Better
Suicide rate	10+ yrs	2017 - 19	8*	31	Similar
Killed and seriously injured (KSI) casualties on England's roads (historic data)	All ages	2016 - 18	54*	240	Worse
Emergency Hospital Admissions for Intentional Self- Harm	All ages	2019/20	262*	350	Worse
Hip fractures in people aged 65 and over	65+ yrs	2019/20	516*	175	Similar
Cancer diagnosed at early stage (experimental statistics)	All ages	2017	49%	325	Not compared
Estimated diabetes diagnosis rate	17+ yrs	2018	71%		Worse
Estimated dementia diagnosis rate (aged 65 and over)	65+ yrs	2021	64%	1451	Similar
Admission episodes for alcohol-specific conditions - Under 18s	<18 yrs	2017/18 - 19/20	36*	35	Similar
Admission episodes for alcohol-related conditions (Narrow)	All ages	2018/19	477*	706	Better
Smoking Prevalence in adults (18+) - current smokers (APS)	18+ yrs	2019	9%	10117	Better
Percentage of physically active adults	19+ yrs	2019/20	71%		Similar
Percentage of adults (aged 18+) classified as overweight or obese	18+ yrs	2019/20	56%		Better
Under 18s conception rate / 1,000 females aged 15- 17	<18 yrs	2018	9	22	Better
Smoking status at time of delivery	All ages	2019/20	4%	57	Better
Breastfeeding initiation	All ages	2016/17	88%	1366	Better
Infant mortality rate	<1 yr	2017 - 19	4*	17	Similar
Year 6: Prevalence of obesity (including severe obesity)	10-11 yrs	2019/20	12%	175	Better

Source: https://fingertips.phe.org.uk/profile/health-profiles/data#page/1/gid/1938132701/ati/201/iid/90366/age/1/sex/1/cat/-1/ctp/-1/yrr/3/cid/4/tbm/1

* Per 1,000 population

Deprivation

- There are 83 Lower Level Super Output Areas (LSOAs) in Mid Sussex, 38 (46%) of these are in the least deprived decile in England and 70% are in the least deprived quintile.

- There are no LSOAs in the top quintile of most deprived local areas in England and only one in the top tertile of deprived local areas. This is located in the Haywards Heath Bentswood ward. The only other LSOA that is in the top half of most deprived local areas in England is located in the Burgess Hill Victoria ward.

- The domains where there is the most deprivation are:

    - o Geographical barriers to housing (12 LSOAs in the most deprived decile)
    - o Indoor living environment (5 LSOAs in the most deprived decile)
    - o Young people's education and skills (4 LSOAs in the most deprived decile)
- Indoor living environment deprivation is most acute in parts of Hurstpierpoint & Downs; High Weald and Bolney wards.

- Young people's education deprivation is most acute in parts of Burgess Hill St Andrews; Burgess Hill Victoria; East Grinstead Ashplats and Haywards Heath Bentswood wards.

IMD Overall		Income	Employment	Education & Skills			Health & Disability	Crime	Barriers to Housing			Living Environment		
				Overall	Children & Young People	Adult Skills			Overall	Geog. barriers	Wider barriers	Overall	Indoors	Outdoors
Decile		LSOAs	LSOAs	LSOAs	LSOAs	LSOAs	LSOAs	LSOAs	LSOAs	LSOAs	LSOAs	LSOAs	LSOAs	LSOAs
1	0	0	0	1	4	0	0	0	3	12	0	4	5	0
2	0	0	0	2	3	1	0	0	5	18	0	2	2	4
3	1	2	1	4	2	0	0	2	10	12	0	2	3	4
4	1	3	6	2	7	2	1	1	7	6	4	3	3	3
5	3	4	3	5	7	4	0	5	10	10	8	6	6	14
6	7	3	6	7	9	8	1	8	10	8	11	5	7	10
7	3	14	6	14	11	13	4	14	6	9	21	8	6	16
8	10	9	10	13	20	14	4	18	14	6	21	11	9	19
9	20	19	20	24	13	26	21	15	11	2	13	19	18	13
10	38	29	31	11	7	14	51	20	7	0	5	23	23	0

Source: https://www.gov.uk/government/statistics/english-indices-of-deprivation-2019

Fuel Poverty

- There are 3,572 households in the District that are fuel poor (2019). This represents 5.8% of all the District's households. This is much lower than the level of fuel poverty in England (13.4%) and below the average for West Sussex (7.0%). Mid Sussex has the lowest proportion of fuel poor households of all districts in the county.

	Number of households	Number of households in fuel poverty	Proportion of households fuel poor (%)
Mid Sussex	61,810	3,572	5.8
West Sussex	372,658	26,185	7.0
England	23,661,751	3,175,979	13.4
Adur	29,120	2,264	7.8
Arun	72,015	5,165	7.2
Chichester	53,740	4,053	7.5
Crawley	46,153	3,441	7.5
Horsham	59,157	3,538	6.0
Worthing	50,663	4,152	8.2

Source: https://www.gov.uk/government/statistics/fuel-poverty-detailed-tables-2021

Unemployment

- At 2.5% (2,280), Mid Sussex has one of the lowest claimant count unemployment rates in England – only 12 districts/boroughs in the country have a lower rate.

- However, the Covid-19 pandemic has had a significant impact on the number of people in the District who are out of work. In August 2019, 815 residents were unemployed. This rose to 3,400 in August 2020 before falling back to 2,280 in August 2021. However, there are still nearly three times more unemployed people in the district than there were before the start of the Covid-19 pandemic.

- Cumulatively, 26,400 employments in the District were furloughed during the pandemic. The number had fallen to 4,790 furloughed by June 2021. The sector with the most furloughed workers in June 2021 were Transport & Storage (870), administrative & support services (650); wholesale & retail (600); and accommodation & food service (560). Equal numbers of males (2,400) and females (2,400) were furloughed.

- Males (2.9%) are more likely to be unemployed than females (2.1%) and they account for 56% of the increase in claimant count unemployment since August 2019.

- In June 2021 there were 25 young people Not in Education, Employment or Training) who were seeking opportunities (Haywards Heath 9, Burgess Hill 9, East Grinstead 7; 15 NEETs who were not available (Haywards Heath 7, Burgess Hill 5, East Grinstead 3); and 114 young people about whom it was not known whether or not they were in employment, education or training.

Mid Sussex	August 2019		August 2020		August 2021		Change 2019-2021	
	Count	Percent	Count	Percent	Count	Percent	Count	Percent
Male	455	1.0	1,985	4.4	1,295	2.9	840	284.6%
Female	360	0.8	1,415	3.1	985	2.1	625	273.6%
Total	815	0.9	3,400	3.7	2,280	2.5	1,465	279.8%
West Sussex	August 2019		August 2020		August 2021		Change 2019-2021	
	Count	Percent	Count	Percent	Count	Percent	Count	Percent
Male	4,835	1.9	16,105	6.5	12,140	4.9	7,305	251.1%
Female	3,750	1.5	11,215	4.3	9,100	3.5	5,350	242.7%
Total	8,585	1.7	27,325	5.4	21,240	4.2	12,655	247.4%
England	August 2019		August 2020		August 2021		Change 2019-2021	
	Count	Percent	Count	Percent	Count	Percent	Count	Percent
Male	558,795	3.2	1,357,985	7.7	1,095,930	6.2	537,135	196.1%
Female	406,480	2.3	924,025	5.2	778,620	4.4	372,140	191.6%
Total	965,275	2.7	2,282,005	6.5	1,874,550	5.3	909,275	194.2%

Source: Claimant Count Office for National Statistics via NOMISWEB

Employment

- The employment rate before the Covid pandemic was 80.4%. This was the third highest in West Sussex (after Adur (84.0%) and Crawley (81.9%). Since the pandemic, the employment rate fell to 76.4% - higher only than Chichester (70.0%) and Horsham (75.9%).

- There were 63,000 people working in Mid Sussex in 2019, 52,100 (86%) working in the private sector. This is similar proportion to West Sussex (86%) and a higher proportion than in England as a whole (84%).

- The number of people working in the District increased by 3,000 (4.5%) between 2015 and 2019. The main increases were in Professional, Scientific & Technical Activities (+1,000); Administrative and Support Activities (+1,500); Education (+1,000); Arts, Entertainment & Recreation (+500); and Other Service Activities (+500). There were 1,000 fewer people working in the Wholesale & Retail sector.

- Two thirds (64%) of local employees in Mid Sussex work full-time. This is lower than in West Sussex (66%) and lower than in England (68%).

- Four sectors account for over half (51 per cent) of employee jobs in Mid Sussex as follows:
- Wholesale and retail trade 18%
- Human Health and social work activities 14%
- Education 11%
- A higher proportion of people are employed in Agriculture, Forestry and Fishing than in West Sussex or England, which reflects the rural nature of the District. However, the percentage who work in these sectors is still very low (1.3%).

- Over half (59%) 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. This is well above the average for the South East of 50% and West Sussex of 49%.

- The most highly concentrated sub-sectors in the district, based on employment density are:
    - Other Credit Granting - LQ = 13.0 - 800 employees
    - Retail Sale of Watches and Jewellery - LQ = 8.0 - 500 employees
    - Wholesale of Pharmaceutical Goods - LQ = 7.5 - 900 employees
    - Activities of Religious Organisations - LQ = 7.5 - 900 employees
- Of sectors that employ more than 1,000 people, the most concentrated activities are:
    - General Secondary Education - LQ = 2.6 – 4,000 employees
    - Other Business Support Service Activities - LQ = 2.3 – 1,500 employees
    - Residential Care Activities for the Elderly - LQ = 2.0 – 1,000 employees

- Three-quarters (74%) of the District’s jobs are in Haywards Heath (22%), Burgess Hill (22%) and East Grinstead (30%), but a quarter (26%) are in rural areas.

2019	Number	Percent	LQ West Sussex	LQ England
A : Agriculture, forestry and fishing	800	1.3	0.8	1.0
B : Mining and quarrying	40	0.1	N/A	1.0
C : Manufacturing	4,000	6.3	0.8	0.8
D : Electricity, gas, steam and air conditioning supply	100	0.2	0.7	0.5
E : Water supply; sewerage, waste management and remediation activities	500	0.8	0.9	1.3
F : Construction	3,500	5.6	1.2	1.1
G : Wholesale and retail trade; repair of motor vehicles and motorcycles	11,000	17.5	1.1	1.2
H : Transportation and storage	1,500	2.4	0.3	0.5
I : Accommodation and food service activities	4,500	7.1	0.8	0.9
J : Information and communication	2,000	3.2	1.1	0.7
K : Financial and insurance activities	3,000	4.8	1.8	1.4
L : Real estate activities	1,000	1.6	1.1	0.8
M : Professional, scientific and technical activities	6,000	9.5	1.3	1.0
N : Administrative and support service activities	4,500	7.1	0.8	0.8
O : Public administration and defence; compulsory social security	1,000	1.6	0.6	0.4
P : Education	7,000	11.1	1.4	1.3
Q : Human health and social work activities	9,000	14.3	1.1	1.2
R : Arts, entertainment and recreation	1,500	2.4	1.1	1.0
S : Other service activities	2,500	4.0	1.8	1.9
Total	**63,000**	**1000.0**	**1.0**	**1.0**

Source: Annual Business Inquiry via NOMISWEB

Earnings

- Median earnings for Mid Sussex residents working full-time are £617.50 per week. This is higher than West Sussex residents' median weekly earnings £575.40 and those of residents in England as a whole (£589.80) meaning that the local economy has access to relatively wealthier consumers than other areas.
- Median earnings for full-time workers in Mid Sussex are £574.20 per week. This is lower than median earnings for full-time workers in England (£589.90 per week) and similar to full time workers in West Sussex (£574.90 per week).
- Hourly earnings for all workers are £14.81. This is 87% of the hourly earnings of working residents (£17.07).
- Female full-time workers who are employed in the District earn, on average, 80% of what their male colleagues earn and full-time female workers who work outside the district earn 76% of what their male equivalents earn. In both these cases, they are lower than the differences in England.
- Male full-time workers who work outside the district earn £108.30 per week more than male full-time workers who are employed in the district. Female full-time workers who work outside the district earn £54.10 per week more than female full-time workers who are employed in the district.
- Some of the difference in gender pay levels is attributable to the difference in the number of hours worked by men and women. Female full-time workers who work outside the district earn 83% of what their male colleagues earn per hour worked. Female full-time workers who are employed within the district earn 89% of what their male colleagues earn per hour.
- Female workers in the district earn £14.41 per hour. This is 95% of male workers' average hourly earnings (£15.15).

Weekly pay - gross (2020)	Amount	Amount	Amount	Female as % of Male Earnings		
	Mid Sussex	West Sussex	England	Mid Sussex	West Sussex	England
All Full Time Workers	**£617.50**	**£575.40**	**£589.80**	**N / A**	**N / A**	**N / A**
Male Full Time Workers	£705.70	£616.10	£627.30	100	100	100
Female Full Time Workers	£533.40	£493.20	£544.30	76	80	87
Male Part Time Workers	N/A	£174.10	£192.20	N/A	100	100
Female Part Time Workers	£192.00	£198.90	£204.80	N/A	114	107
All Male	£604.40	£574.80	£574.90	100	100	100
All Female	£422.40	£375.80	£397.50	69.9	65.4	69.1
Workplace Earnings						
Weekly pay - gross (2020)	Amount	Amount	Amount	Female as % of Male Earnings		
	Mid Sussex	West Sussex	England	Mid Sussex	West Sussex	England
All Full Time Workers	**£574.20**	**£574.90**	**£589.90**	**N / A**	**N / A**	**N / A**
Male Full Time Workers	£597.40	£588.20	£628.00	100	100	100
Female Full Time Workers	£479.30	£511.00	£544.00	80	87	87
Male Part Time Workers	N/A	£182.10	£191.60	N/A	100	100

Female Part Time Workers	N/A	£198.90	£204.50	N/A	109	107
All Male	£567.00	£568.10	£574.90	100	100	100
All Female	£411.20	£377.00	£397.30	72.5	66.4	69.1

Source: Annual Survey of Hours & Earnings; Office for National Statistics via NOMISWEB; 2020

Travel to Work

- There are 0.8 jobs in Mid Sussex for every 1.0 working age resident. This results in high levels of out-commuting, particularly to London and neighbouring Crawley and Brighton & Hove.
- Mid Sussex has 91,000 working age residents and 69,600 economically active residents who are available for work[11].
- Around 44 per cent of employed residents (31,880) commute out of the District to work and 33 per cent of the District's workers (20,410) commute into Mid Sussex to work.
- There are over 11,000 net out-commuters from the District and 2.1 people commute out of Mid Sussex to work for every one person who commutes into the district to work.
- Nearly 10,000 working residents work at or mainly from home and a further 5,800 employed residents have no fixed place of work.
- 8,100 of the District's working residents commute to London, including 5,600 males and 2,500 females; and a further 7,100 commute to Crawley to work.
- The impact of the Covid-19 pandemic and the adoption of digital technologies is likely to have a significant impact on travel to work patterns, with more flexible employment and increases in home-working.

Working Residents	72,805
Workplace Workers	61,335
Live and Work in District	40,925
Self-Contained Rate	56.2%
Out Commuters	31,880
Top out-commuting destinations	Crawley, Brighton & Hove, Westminster, City of London, Tandridge
In-commuters	20,410
Top in-commuting destinations	Brighton & Hove, Crawley, Wealden, Lewes
Net inflow of workers	-11,470

Source: Population estimates – England & Wales (2020); Office for National Statistics via NOMISWEB & Annual Population Survey April 2020-March 2021; Office for National Statistics via NOMISWEB

11 Population estimates – England & Wales (2020); Office for National Statistics via NOMISWEB & Annual Population Survey April 2020-March 2021; Office for National Statistics via NOMISWEB

Education and Qualifications

• Mid Sussex has a highly educated workforce, with 52.6% of those aged 16-64 possessing a Level 4+ qualification and 68.3% hold a Level 3+ qualification. Mid Sussex has the highest proportion of working age residents with Level 4 qualifications.
• Mid Sussex has a mix of independent and state secondary and special schools. State secondary schools include Warden Park School and Oathall Community College in Haywards Heath; the Burgess Hill Academy, St Paul's Catholic College and Downlands Community School in Hassocks; and Sackville School and Imberhorne School in East Grinstead, all of which have either 'Good' or 'Outstanding" OFSTED ratings. Independent schools include Hurstpierpoint College, Burgess Hill Girls School. and Worth School all offering post 16 education.
• The only specialist state Sixth Form College in the District is Haywards Heath College, which reopened in September 2020 following a three year closure.
• Mid Sussex does not have a dedicated 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.

Jan 2020-Dec 2020	% with NVQ4+ - aged 16-64		% with NVQ3+ - aged 16-64		% with NVQ2+ - aged 16-64		% with NVQ1+ - aged 16-64		% with no qualifications (NVQ) - aged 16-64	
	Count	percent	Count	percent	Count	percent	Count	percent	Count	percent
Mid Sussex	45,300	52.6	58,800	68.3	72,800	84.6	79,200	92.0		
West Sussex	203,600	40.5	302,800	60.2	389,800	77.6	444,300	88.4	24,500	4.9
England	14,886,100	42.8	21,296,900	61.2	27,158,800	78.0	30,594,400	87.9	2,153,900	6.2

Source: Annual Population Survey, Office for National Statistics via NOMISWEB, Jan 2020-December 2020

Apprenticeships

Between August 2019 and April 2020, 640 residents in Mid Sussex started an apprenticeship and 190 completed one. There were 270 Advanced Apprenticeship starts and 90 achievements; 170 Higher Apprenticeship starts and 30 achievements; and 200 intermediate starts and 80 achievements;

- Business, Administration and Law had the most starts (190), followed by Health, Public Services & Care (160) and Engineering & Manufacturing Technologies (100). These sectors also had the highest number of achievements.
- Marginally more males (52%) than females (48%) started an apprenticeship. However, only 10 of the 100 Engineering & Manufacturing Technology apprenticeship starters were females and only 25% (4) of the Health, Public Services & Care apprenticeship starters were males.
- Just under a half (45%) of all new apprentices were aged 25+ years.

Apprenticeships August 2019-April 2020					
Level	**Starts**	**Achievements**	**Subject**	**Starts**	**Achievements**
Advanced Apprenticeship	270	90	Agriculture, Horticulture and Animal Care	10	-
Higher Apprenticeship	170	30	Business, Administration and Law	190	50
Intermediate Apprenticeships	200	80	Construction, Planning and the Built Environment	40	10
Gender	Starts	Achievements	Education and Training	10	-
Male	330	100	Engineering and Manufacturing Technologies	100	40
Female	310	100	Health, Public Services and Care	160	60
Age	Starts	Achievements	Information and Communication Technology	40	10
Under 19	150	70	Leisure, Travel and Tourism	20	10
19-24	200	60	Retail and Commercial Enterprise	70	20
25+	290	60	Total	640	190

Source:https://www.gov.uk/government/statistical-data-sets/fe-data-library-apprenticeships;Department for Education; August 2019-April 2020

Place

Key Findings

- Mid Sussex has a high proportion of micro-businesses and a small number of larger employers compared with West Sussex and England.

- There is a high concentration of businesses in the Professional, Scientific & Technical, Information & Communication and education sectors.

- The number of newly registered businesses has declined and the number of business de-registering has increased in recent years.

- Three sectors of the economy account for a little under half (43%) of all jobs in the district: Wholesale & retail (18%); health & social work (13%); and education (12%).

- The District has around 158,000 sqm of office accommodation; The district has around 497,000 sqm of industrial floorspace.

- Average rents range from £15.71 per sq.ft to £23.45 per sq.ft for offices space; £9.93 per sq.ft to £10.54 per sq.ft for industrial accommodation; and from £21.86 per sq.ft to £23.52 per sq.ft for retail floorspace.

- The three town centres, Burgess Hill, East Grinsted and Haywards Heath are performing relatively well although footfall in the centres has been impacted by the Covid 19 pandemic.

- The number of vacant units in East Grinsted and Haywards Heath has stayed relatively consistent over time and is below the national average of 14.2%. However, the percentage of vacant units in Burgess Hill has increased from 13.2% in 2014 (the date of the previous Health Checks) to 14.7% (in the latest Study) which is higher than the national average.

GVA and Productivity

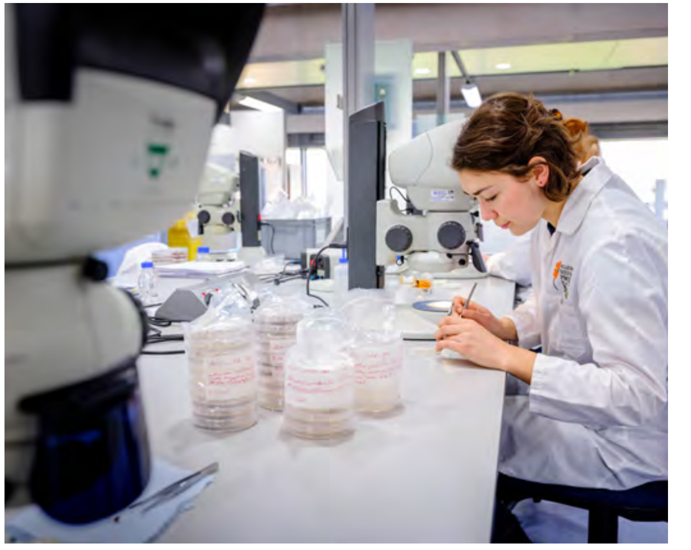
- In 2018 the total value of the Mid Sussex economy was £3.23 billion. The main contributors to this were:
    - o Real Estate Activities: £749 million (24%) – this is mainly accounted for by ‘owner occupiers imputed rental (£579 million), which is the implied amount that owner occupiers would have to pay rent for the properties that they own.
    - o Wholesale & Retail: £369 million (11%) – this is equally split between the wholesale and retail sub-sectors
    - o Human health & social work activities: £349 million (11%)
    - o Manufacturing: £257 million (8%)
    - o Education: £269 million (8%).
- A quarter of the value of the Mid Sussex economy is accounted for by the imputed costs of residential properties.
- Gross Value Added (GVA) per hour worked is £32.52 and £51,157 per job filled – both below the average for the Coast to Capital LEP area.[12] Since 2010 productivity per job has increased by 1.

12 Subregional Productivity: Labour Productivity by Local Authority District (2019); Office for National Statistics

- 8.5% and productivity per hour worked by 19.3%, based on current prices.

GVA per Hour Worked	2010	2019	2010-2019 Change	
Mid Sussex	£27.45	£32.52	£5.07	18.5%
Adur	£29.44	£32.65	£3.21	10.9%
Arun	£23.89	£29.81	£5.92	24.8%
Chichester	£25.55	£31.15	£5.60	21.9%
Crawley	£32.00	£37.07	£5.07	15.8%
Horsham	£30.11	£32.55	£2.44	8.1%
Worthing	£35.31	£46.04	£10.73	30.4%
GVA per Job Filled	**2010**	**2019**	**2010-2019 Change**	
Mid Sussex	£42,879	£51,157	£8,278	19.3%
Adur	£45,676	£50,367	£4,691	10.3%
Arun	£36,570	£43,925	£7,355	20.1%
Chichester	£38,084	£46,011	£7,926	20.8%
Crawley	£50,116	£62,666	£12,551	25.0%
Horsham	£46,936	£52,789	£5,853	12.5%
Worthing	£54,136	£71,620	£17,484	32.3%

Source: Sub Regional Productivity: Labour Productivity Indices by Local Authority District; Office for National Statistics; 2021



Business Stocks and Birth, Death & Survival Rates

- There are 8,080 registered businesses in Mid Sussex (2019). This is 775 more than there were in 2014. The growth rate over the period (10.6%) is similar to the average for West Sussex (10.9%).

- There has been a modest annual reduction in the number of newly formed businesses since 2014, when 905 new businesses were registered. In 2019, 835 new businesses were started.

- The number of business de-registrations has increased from 630 in 2014 to 815 in 2019.

- Three year business survival rates were lower for businesses that were formed in 2016 (58.4%) than there were for businesses that were formed in 2014 (63.5%). They are below the three year survival rates for West Sussex (60.3%).

	2014	2019		2014	2019
STOCK					
Mid Sussex	7,305	8,080	Mid Sussex	N/A	N/A
West Sussex	36,155	40,090	West Sussex	N/A	N/A
BIRTHS			**BIRTH RATES**		
Mid Sussex	905	835	Mid Sussex	12.4%	10.3%
West Sussex	4,315	4,180	West Sussex	11.9%	10.4%
DEATHS			**DEATH RATES**		
Mid Sussex	630	815	Mid Sussex		
West Sussex			West Sussex		
CHANGE IN STOCK from 2014			**CHANGE IN STOCK from 2014**		
Mid Sussex	0	775	Mid Sussex	8.6%	10.1%
West Sussex	0	3,935	West Sussex	9.0%	9.9%
3 YEAR SURVIVAL RATE					
	2014	2016			
Mid Sussex	63.5%	58.4%			
West Sussex	64.0%	60.3%			

Source: Business Demography, Office for National Statistics; 2021

Business Sectors

- Three sectors account for nearly half (46%) of all business units in the District: Professional, Scientific & Technical (20%); Wholesale & Retail (14%); and Construction (12%). However, many of these businesses are micro-businesses employing a small number of people.
- There is a high concentration of businesses in the Professional, Scientific & Technical, Information & Communication and education sectors. There is a low concentration of businesses in the Transport & Storage; Accommodation & Food Service; Manufacturing; Electricity, Gas & Water Supply, Agriculture, Forestry & Fishing and Public Administration, Defence & Social Security sectors.
- Since 2015, the largest increase in local business units has been in construction (+185), professional, technical & scientific activities (+85), administration & support (+90) and information & communications (+90).

Industry - 2020	Count	Percent	LQ - England	LQ - West Sussex
A : Agriculture, forestry and fishing	230	2.8	0.7	0.8
B : Mining and quarrying	5	0.1	1.1	1.3
C : Manufacturing	315	3.8	0.8	0.8
D : Electricity, gas, steam and air conditioning supply	10	0.1	0.7	0.6
E : Water supply; sewerage, waste management and remediation activities	30	0.4	1.0	0.9
F : Construction	1,045	12.6	1.1	1.0
G : Wholesale and retail trade; repair of motor vehicles and motorcycles	1,175	14.1	0.9	0.9
H : Transportation and storage	165	2.0	0.4	0.6
I : Accommodation and food service activities	395	4.8	0.7	0.8
J : Information and communication	815	9.8	1.3	1.3
K : Financial and insurance activities	225	2.7	1.1	1.2
L : Real estate activities	290	3.5	0.9	1.0
M : Professional, scientific and technical activities	1,615	19.4	1.2	1.2
N : Administrative and support service activities	790	9.5	1.1	1.1
O : Public administration and defence; compulsory social security	35	0.4	0.6	0.7
P : Education	225	2.7	1.2	1.1
Q : Human health and social work activities	405	4.9	1.0	1.0
R : Arts, entertainment and recreation	225	2.7	1.0	1.0
S : Other service activities	320	3.9	1.1	1.0
Column Total	**8,310**	**100.0**		

Source: Business Register & Employment Survey (BRES); Office for National Statistics via NOMISWEB; 2020

Business Size

- Nearly nine out of ten (87%) of the District's businesses employ fewer than ten people and three quarters (75%) employ fewer than five people. The proportion of micro-businesses in the District is slightly higher than in West Sussex (85%) and England (85%).

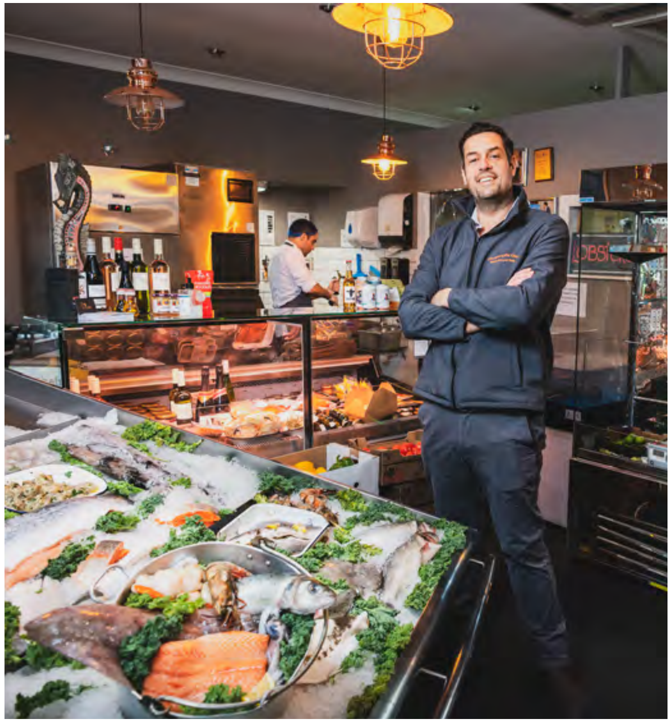
- There are 905 (10.9%) business units in the district employing 10-49 staff. This is a lower proportion than in West Sussex (12.1%) and in England (12.2%).

- The District also has a low proportion of business units employing 50-249 staff (1.9% or 160 businesses). This compares with 2.5% in West Sussex and 2.6% in England.

- There are twenty business units in the district with 250+ staff – 0.2% of all the District's businesses. This is a much lower proportion than in West Sussex (0.4%) and England (0.4%). Secondary education providers and retail supermarkets account for at least half of the District's large business units.

	Count	Percent	LQ - England	LQ - West Sussex
Micro (0 to 9)	7,225	86.9	1.0	1.0
0 to 4	6,225	74.9	1.0	1.0
5 to 9	1,000	12.0	1.0	1.0
Small (10 to 49)	905	10.9	0.9	0.9
10 to 19	575	6.9	0.9	1.0
20 to 49	330	4.0	0.8	0.8
Medium-sized (50 to 249)	160	1.9	0.8	0.8
50 to 99	105	1.3	0.8	0.8
100 to 249	55	0.7	0.7	0.7
Large (250+)	20	0.2	0.6	0.6
250 to 499	15	0.2	0.7	0.7
500 to 999	0	0.0	0.0	0.0
1000+	0	0.0	0.0	0.0
Total	8,310	100.0	1.0	1.0

Source: UK Business Counts, Office for National Statistics via NOMISWEB; 2020



Commercial Floorspace

In 2021, Mid Sussex contained 655,000 sqm of business floorspace, comprising 497,000 sqm of industrial and 158,000 sqm of office space.

Mid Sussex's commercial property market centres around the District's three main towns of Haywards Heath, Burgess Hill and East Grinstead, , each with a distinctive offer and character.

- Haywards Heath - 35% of the District's office market is located in Haywards Heath 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, with 50% of the District's industrial floorspace. 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.
- Two-thirds 66% of the commercial floorspace is in urban parts of the district and one third (34%) is in its rural parts. Over half of all the District's warehouse space is located in rural areas.

Offices

- The District has 158,000 sqm office accommodation. There has been a modest decline in the stock since 2014, however this is anticipated to increase due to the allocation of office space within the Site Allocations DPD, including at the Science and Technology Park to the west of Burgess Hill (provisionally over 30% equivalent to nearly 40,000 sqm).
- Four and five star accommodation accounts for 13% of the office floorspace stock; three and four star makes up 63%; and one and two star the remaining 25%.
- The long-term impact of the Covid-19 pandemic on working patterns could change the way that office space is used in the district.
- Market rents range from £16.87 per sq.ft for one and two star accommodation to £23.45 per sq.ft for five star office space. Most of stock is three and four star, for which rents are £15.71 per sq.ft.
- The office vacancy rate is 3.4%, but this is much higher for four and five star accommodation (19%) than three star (3.2%) and one and two star (0.8%) accommodation.

Industrial

- The District has around 497,000 sqm of industrial floorspace, 64% of which is in the logistics sector; 12% is specialist industrial floorspace; and the remaining 23% is light industrial.
- There has been an increase of around 8.3% since 2020, mostly in the logistics sector.
- Market rents range from £9.93 per sq.ft for specialist industrial floorspace to £10.54 per sq.ft for light industrial floorspace. Logistics floorspace averages at £10.29 per sq.ft.

- The vacancy rate is 3.9% which is expected to reduce to 3% in 2022. This includes 5.5% of logistics accommodation and 3.0% of light industrial floorspace. There is no vacancy in the specialist industrial sector.
- There are twenty-one business parks spread across the District, the largest of which is the Victoria Business Park in Burgess Hill.
- The development plan for the District sets out a policy framework to support the delivery of a c50ha Science and Technology Park in Burgess Hill, which will deliver approximately 123,000 sqm of floorspace plus ancillary uses and will bring 2,500 jobs to the District.

Retail

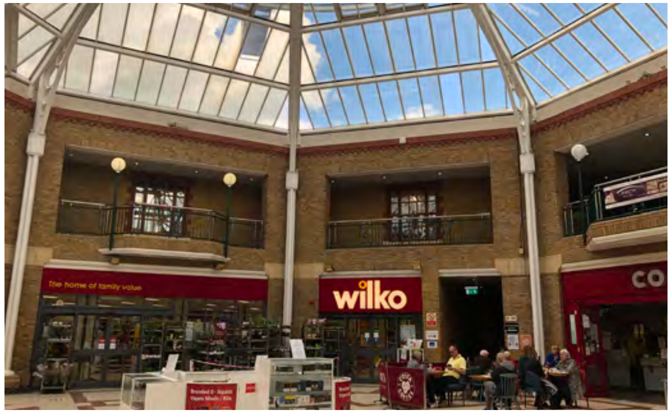
The Mid Sussex District Council Retail Study (2022) indicated that while the three towns are performing reasonably well they are not meeting their full potential. In addition:

- The Covid -19 pandemic has led to a significant increase in the number of residents shopping online for both convenience and comparison goods. Before the first lockdown, 34.6% of those residents in the Study Area had shopped for groceries online at some point. During the lockdowns, this number increased to 46.6%. Since the lockdown has been lifted, the number using online services has decreased slightly to 41.1%, but remains significantly higher than before lockdowns. Before the first lockdown, 82.5% of Study Area residents shopped for comparison goods online. During the lockdowns, this number increased slightly to 83.1%. Since the lockdowns have been lifted, this figure has risen slightly again to 84.7%.
- There is an extant planning permission to redevelop the Martlets Centre in Burgess Hill, including the provision of larger floorspace sites suitable for fashion retail, commercial leisure and a town centre hotel.
- There are also plans to redevelop the Orchards Shopping Centre in Haywards Heath, highlighted in the Haywards Heath Town Centre Masterplan, including expanding the existing Marks & Spencer store as the anchor tenant.

The Retail Study also sets out the results of a town centre health check and the conclusions for the three town centres are set out below:

Burgess Hill

- There are 15 convenience units which account for 7.6% of the overall composition in Burgess Hill Town Centre. This is slightly lower than the UK average of 9.2%. Since the previous health checks were undertaken for the 2014 Retail Study, the overall proportion of convenience floorspace has reduced from 14.4% to 11.6%, which is lower than the UK average of 15.4%.
- Comparison units account for 25.8% of the overall units which is slightly lower than the conclusions of the previous retail study (28.4%), and the UK average (27.1%).
- The vacancy rate in the centre is 14.6% of the overall composition, slightly higher than the UK average of 14.2%. The vacancy rate also represents an increase since the previous retail study health checks were undertaken in 2014, from 13.2%.
- Enhancement to the overall public realm and landscaping will be key to improving the environmental quality and would have significant benefits for the appearance and perception of the area. This would in turn assist in generating further investment in the wider town centre.



• The centre has vacancy rate of 14.6% of the overall composition in the centre which has increased from 13.2% in 2014.
• Although Burgess Hill is one of the larger centres in the District, the range of shops, cafes, pubs and restaurants is limited.
• The footfall within the Centre has decreased by 13% in December 2021 from the figure in December 2019. The average dwell time has decreased by 11% over the same time-period.

East Grinstead

• East Grinstead has seen an increase in convenience units since the last Retail Study in 2014, from 4.3% to 7.9% of the overall units in the centre. This is slightly below the UK average of 9.2%. Overall, convenience floorspace accounts for 12.2% of the centre’s total floorspace, which is slightly below the UK average of 15.4%. The centre has a range of convenience stores with the main big name brands including Waitrose, Holland & Barret, Iceland and Greggs. The remaining convenience stores are mainly independent.

• The centre has seen a significant decrease in the number of comparison units since 2014, at which point, comparison units accounted for 35.1%. In 2021, comparison units made up 27.1% which is in line with the UK average. Notwithstanding, comparison units still make up the largest proportion of units in the centre.

• The centre has a successful offering of independent units.

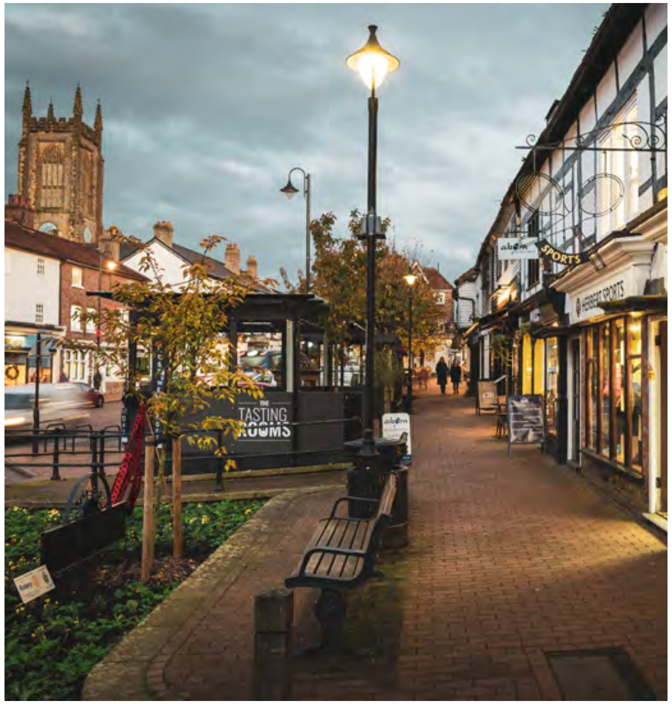
• The number of vacant units in the centre have remained largely the same in both 2014 (7.7%) and 2021 (7.4%) which in any event is lower than the UK average of 14.2%.

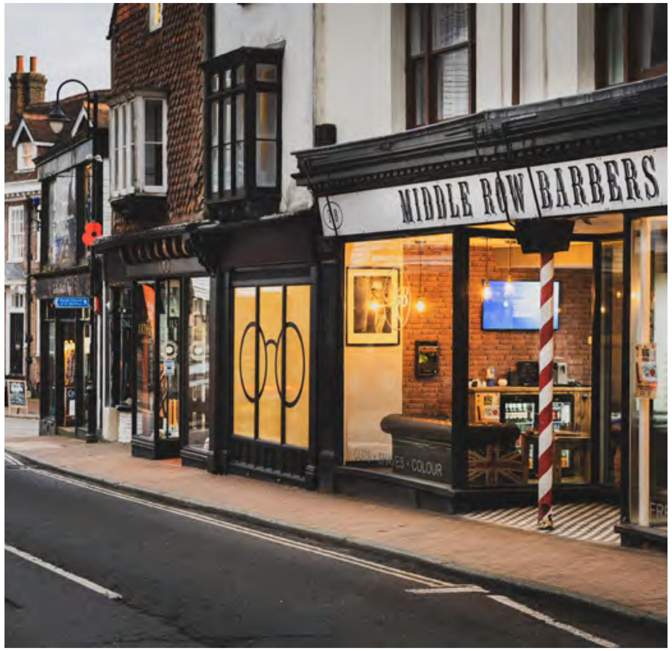
• The historic environment provides an important platform to market the town as a destination with a particular focus on the unique historic character including existing tourist facilities such as the Bluebell Railway nearby.

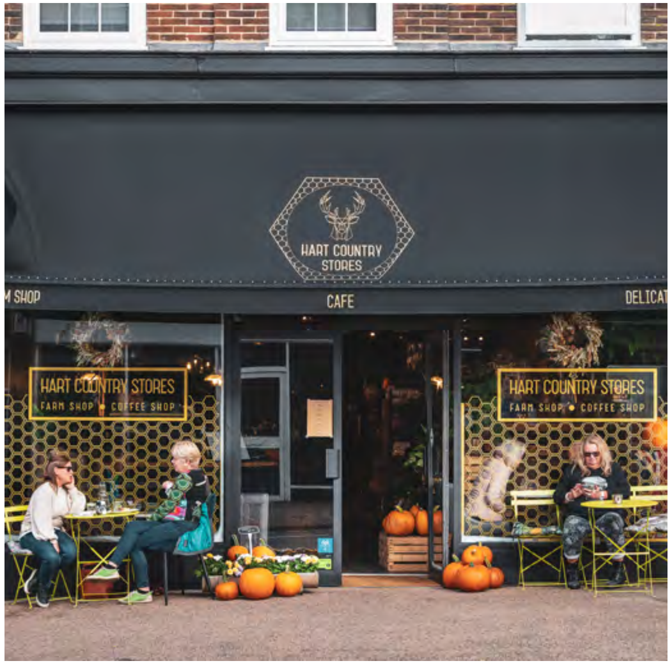
• The quality of the attractive shopfronts decreases as you move northbound and away from the historic buildings on the High Street.

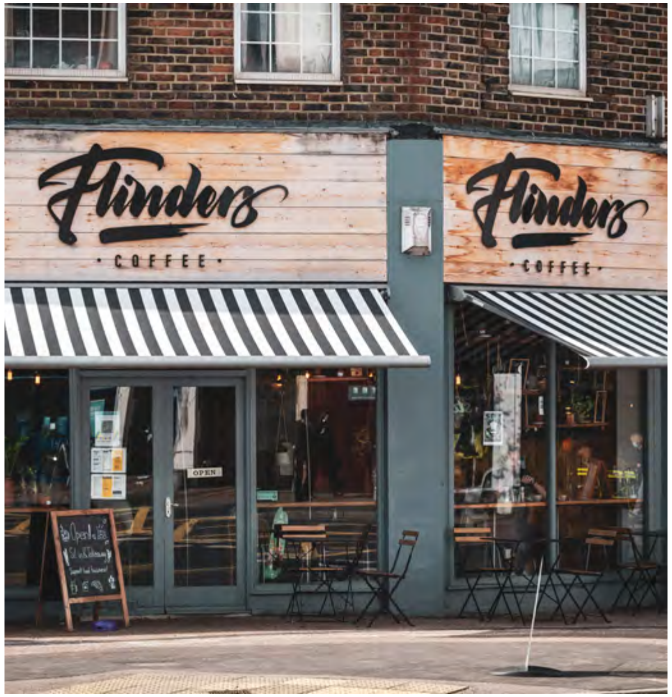
• The majority of the units in the centre close at 5:30pm, limiting the potential for an established night time economy.

• The footfall within the Centre has decreased by 8% in December 2021 from the figure in December 2019. The average dwell time has decreased by 5% over the same time-period.









Haywards Heath

- The centre has seen a slight decrease of 1.0 percentage points in convenience stores (6.7%) compared to 2014 figures (7.7%). This proportion of convenience units in 2021 is lower than the UK average of 9.2%. In terms of convenience floorspace, the centre has the same proportion as the UK average of 15.4%.

- Comparison units account for the majority of the stores within Haywards Heath with 84 units, representing 37.7% of the overall composition. There has been a slight drop in comparison stores since 2014, when comparison units accounted for 40.3% of the overall units.

- The centre comprises largely of independent stores.

- The Retail Study identified 19 vacant units (8.5%), which is a lower proportion that the UK average (14.2%). This demonstrates the success of the large number of independent retailers and services available in the centre. The majority of the vacant units were located on the southern end of the Broadway as well as a few along South Road.

- Buildings in the centre would benefit from a consistent strategy of upgrading or repainting in order to improve the appearance and perception of the area, and overall environmental quality.

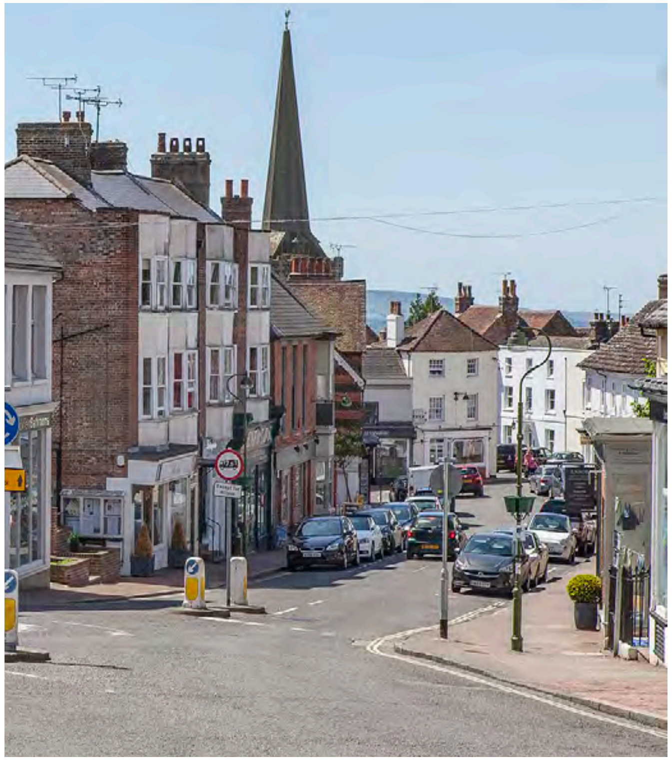
- Comments from stakeholders suggested that there was an under provision of supermarkets in the centre, and that more variety would benefit the town centre.

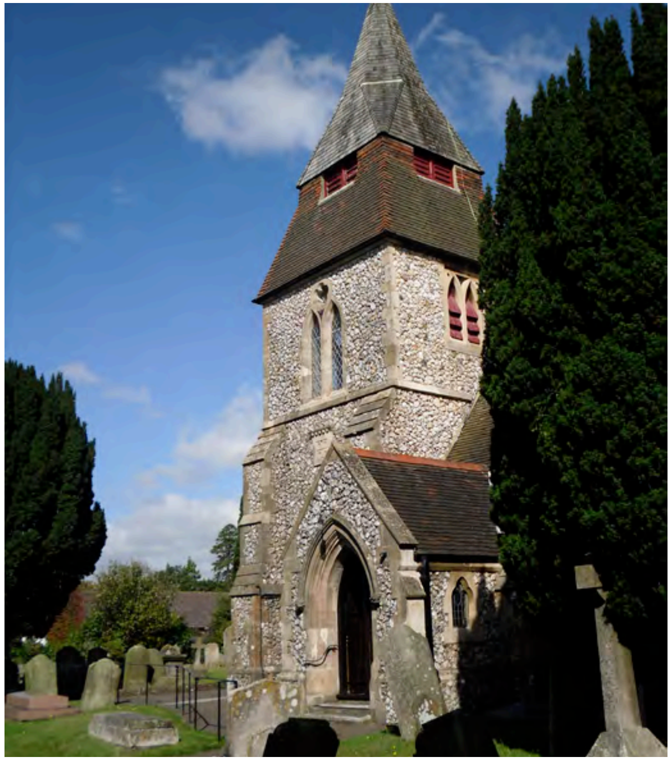
- The footfall within the Centre has decreased by 2% in December 2021 from the figure in December 2019. The average dwell time has remained the same over the same time-period.

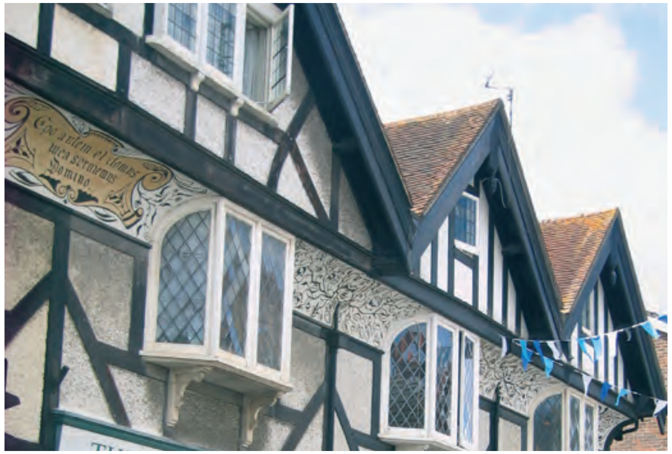
The following table compares the change in footfall within the District’s five Village centres between December 2019 and December 2021.

Village Centre	% Change Footfall (Dec 19 – Dec 21)	% Change Dwell Time (Dec 19 – Dec 21)
Crawley Down	25%	-23%
Cuckfield	1%	29%
Hassocks	-3%	6%
Hurstpierpoint	-11%	-10%
Lindfield	-2%	13%

Source: Visitor Insights baseline reports (December 2021)







Housing

• The Objectively Assessed Need (OAN) for housing has been established as 14,892 (an average of 876 dwellings per annum). The District Plan sets a minimum housing provision figure of 16,390 homes in the 17-year period 2014 – 2031. The annual provision in this stepped trajectory is 876 dwellings per annum until 2023/24 and 1,090 dwellings thereafter.
• As of the 1st April 2021, there were 9,140 commitments within the planning process. This includes sites allocated within the District Plan and Neighbourhood Plans as well as dwellings with planning permission. The Site Allocations DPD is currently at examination, with adoption anticipated in spring 2022. This will allocate a further 1,704 dwellings meaning a total of 17,297 dwellings will have been planned- for within the period 2014-2031 against the adopted target of 16,390.
• The average price of a residential property in July 2021 was £399,158. This is higher than in West Sussex (£356,189) and in England (£270,973). Flats and maisonettes are also more expensive (£216,743) than in West Sussex (£201.609), but they are less expensive than the England average (£237,188).
• Residential property prices increased by 24% between 2015 and 2021. This is a slightly slower rate of increase than in West Sussex (27%) and England (27%). The costs of flats and maisonettes have also increased at a slightly slower rate.
• Housing affordability is a significant local issue. The average cost of a residential property in the district is 13.4 times median workplace earnings of full-time workers and 10.8 times the earnings of local residents. This compares with 11.8 and 11.3 respectively in West Sussex and 8.5 for both workers and residents in England.
• Flats and maisonettes are more affordable - 7.3 times median earnings of full-time workers and 5.9 times median earnings of full-time working residents. This makes flats and maisonettes less affordable than the equivalent properties across the whole of West Sussex (6.7 & 6.4), but slightly more affordable than in England as a whole (7.5 & 7.5).
• Between 2014/15 and 2018/19, 3,914 new homes were built in the district, 709 of where were affordable homes. Around 930 households approach the Council each year regarding housing and homelessness.

	All Properties Jul-15			All Properties Jul-21		
	Average Price	Affordability Workplace	Affordability Residents	Average Price	Affordability Workplace	Affordability Residents
Mid Sussex	£321,336	11.5	10.1	£399, 158	13.4	10.8
West Sussex	£279,825	10.5	9.8	£356,189	11.8	11.3
England	£213,518	7.7	7.7	£270,973	8.5	8.5
FLATS & MAISONETTES						
	Average Price	Affordability Workplace	Affordability Residents	Average Price	Affordability Workplace	Affordability Residents
Mid Sussex	£184,286	6.6	5.8	£216,745	7.3	5.9
West Sussex	£166,843	6.3	5.8	£201,691	6.7	6.4
England	£200,004	7.2	7.2	£237,188	7.5	7.5

Source: UK House Price Index; HM Land Registry 2015 and 2021; and Annual Survey of Hours & Earnings (Workplace Analysis) Office for National Statistics, via NOMISWEB (2015 & 2021)

Transport

- Just over a third (36.8%) of adult residents either walk or cycle at least five times per week. This is marginally more than the average for West Sussex (36.3%) and significantly more than the average for England (34.2%).
- Regular cycling (3.7%) is similar to West Sussex (4.0%) and more prevalent than England (3.4%), but less prevalent than in neighbouring Crawley (6.6%).
- One in ten (10.1%) of adult residents cycle at least once a week for leisure and one in thirteen (6.7%) cycle at least once a week for non- leisure purposes.
- A third (34.0%) of adult residents walk at least five times per week. This is a higher proportion than in both West Sussex (32.5%) and England (30.9%).
- Half (49.8%) walk at least once a week for leisure purposes, compared with 52.7% in West Sussex and 47.0% in England. A fifth (20.3%) of adult residents walk regularly (at least five times per week) for non-leisure purposes, compared with 15.4% in West Sussex.

Active Travel

Cycling and Walking	2015-16 Once per month	2015-16 Once per week	2015-16 Three times per week	2015-16 Five times per week
Mid Sussex	81.4%	75.4%	48.9%	36.8%
West Sussex	79.0%	70.5%	45.7%	34.2%
England	83.8%	74.4%	49.0%	36.3%
Cycling	**Once per month**	**Once per week**	**Three times per week**	**Five times per week**
Mid Sussex	20.7%	14.0%	6.7%	3.7%
West Sussex	17.1%	11.9%	5.7%	3.4%
England	21.6%	15.4%	6.7%	4.0%
Walking	**Once per month**	**Once per week**	**Three times per week**	**Five times per week**
Mid Sussex	80.7%	73.4%	45.4%	34.0%
West Sussex	77.3%	68.0%	41.8%	30.9%
England	82.0%	71.6%	44.6%	32.5%

Source: How Often and Time Spent Walking & Cycling at Local Authority Level (CW010); Department for Transport; 2016

Road Traffic Accidents

• There were 319 road traffic accidents in Mid Sussex in 2019. This is 53 fewer than there had been in 2014. The number of accidents per resident has fallen from 2.6 to 2.1 over the period. The accident rate is now amongst the lowest in West Sussex, having previously been amongst the highest.

	2014			2019		
	Population	**Road Accidents**	**Road Accidents per 1000 Residents**	**Population**	**Road Accidents**	**Road Accidents per 1000 Residents**
Mid Sussex	144,700	372	2.6	151,000	319	2.1
West Sussex	830,500	2088	2.5	864,000	1981	2.3
Adur	63,300	168	2.7	64,300	148	2.3
Arun	154,700	354	2.3	160,800	314	2.0
Chichester	116,300	350	3.0	121,100	326	2.7
Crawley	109,900	270	2.5	112,400	301	2.7
Horsham	134,500	315	2.3	143,800	315	2.2
Worthing	107,300	261	2.4	110,600	259	2.3

Source: Reported Road Casualties: Great Britain Annual Report; Department for Transport Statistics 2019

Ultra-Low Emissions Vehicles

• There were 1,234 licensed Ultra Low Emissions Vehicles in Mid Sussex in Q2 2021. This is an increase of 1,052 since Q2 2016. There are more ULEVs in Mid Sussex than in any other District/Borough in West Sussex. The District has 35 Public Electrical Charging Points, including five rapid points.

	Licensed Ultra Low Emissions Vehicles			
	2016	**2021**	**Change**	
Mid Sussex	**182**	**1,234**	**1,052**	**578%**
West Sussex	**747**	**5,324**	**4,577**	**613%**
England	**67,218**	**505,077**	**437,859**	**651%**
Adur	39	290	251	644%
Arun	105	676	571	544%
Chichester	117	984	867	741%
Crawley	93	463	370	398%
Horsahm	143	1,227	1,084	758%
Worthing	66	449	383	580%

Source: Ultra low emission vehicles by local authority; Department for Transport; Q2 2021

Car Parking

- The Council provides just under 2,800 spaces in 34 public car parks across the District. 22 are pay and display car parks in the towns and a further 12 have time limits but no charges in the larger villages.
- There are 745 off-street parking spaces in Burgess Hill, 722 in East Grinstead, 846 in Haywards Heath and 468 in rural parts of the district.
- There are also 2,300 restricted on-street spaces. This includes the Controlled Parking Zone in East Grinstead.
- Average tariffs are £1.10 for two hours. This is low compared with most neighbouring district.

Location	Spaces
Burgess Hill	745
East Grinstead	722
Haywards Heath	846
Other	468
TOTAL	**2,781**
On-street parking	2,300
Average 2hr tariff	£1.10

Source: Car Park Investment Strategy; Mid Sussex District Council; March 2021

Digital Connectivity

- There are 2,865 (4.7%) people working in the digital economy, 1,000 of whom are employed in computer consultancy activities. This is a higher proportion than across West Sussex (3.7%), but slightly below the proportion for England (5.0%).

- Over nine out of ten (92%) of households have access to superfast broadband. This is much higher than in West Sussex (64%) as a whole.

Crime

• In the 12 months to July 2021, there were 9,443 crimes committed in the District, including 2,661 violent crimes and 3,212 Anti-Social Behaviour crimes Based on current population estimates, this represents a crime rate of 62.1 crimes per 1,000 residents. This the lowest of all the Districts/Boroughs in West Sussex.

• In 2019-2020, the crime rate increased to 62.9 per 1,000 residents from 55.9 the year before. It continued to rise in the twelve months to July 2021.

	Resident population	Crimes	Crimes per 1000 residents
Mid Sussex	152,100	9443	62.1
West Sussex	867,600	73972	85.3
Adur	64,200	5127	79.9
Arun	161,100	14804	91.9
Chichester	121,500	10257	84.4
Crawley	112,500	14407	128.1
Horsham	145,500	9427	64.8
Worthing	110,700	10584	95.6

Source: UK Crime stats https://www.ukcrimestats.com/

Rural Economy

• Nearly 50% of the District is within the High Weald Area of Outstanding Natural Beauty, and over 10% is within the South Downs National Park.

• There are 230 Agriculture, Fishing and Forestry businesses in Mid Sussex, reflecting the importance of the local economy. Within this sector, there are concentrations of businesses relating to silviculture & forestry activities and also to wine-making.

Energy

Carbon Emissions

- In 2019 Mid Sussex net emissions were 599 ktCO_2. This was equivalent to 4.0tCO_2 per capita. This was the same as for West Sussex (4.0tCO_2). Transport (289 ktCO_2 accounted for the largest share of emissions, followed by Domestic (224.7 ktCO_2). The total figure is net of -70 ktCO_2 LULUCF.

Net emissions have fallen by 287 ktCO_2 (-32%) and by 2.8tCO_2 (-42%) per capita since 2005, with the largest fall (-119 ktCO_2) being in the domestic sector. The reduction is CO_2 emissions overall has been lower than the average for West Sussex (-36%), but the rate of reduction per capita has been very similar to the county's reductions (-43%).

	Year	Industry Total	Commercial Total	Public Sector Total	Domestic Total	Transport Total	LULUCF Net Emissions	Grand Total	Per Capita Emissions (t)
Mid Sussex	2005	130	95	36	344	342	-60	886	6.8
	2019	91	46	18	225	289	-70	599	4.0
	Change (tCO_2)	-39	-48	-17	-119	-53	-10	-287	-2.8
	Percent	0	-1	0	0	0	16%	0	-42%
West Sussex	2005	944	756	222	1,986	1,785	-252	5,441	7.1
	2019	570	353	115	1,235	1,512	-317	3,468	4.0
	Change (tCO_2)	-374	-403	-107	-751	-273	-65	-1,973	-3.0
	Percent	-40%	-53%	-48%	-38%	-15%	26%	-36%	-43%

Source: UK Local Authority & Regional Carbon Dioxide Emissions National Statistics; Department for Business, Energy & Industrial Strategy; 2021

Fuel Consumption

- The District consumed 3,048 GWh of fuel in 2018, 40% of which was consumed by the domestic sector, 36% by road transport and 24% by the non-domestic sector.
- Within the transport sector, cars (petrol) accounted for 34% of the consumption and cars (diesel) for 32% of consumption.

Fuel Consumption by Sector 2018	Gas (GWh)	Electricity (GWh)	Petroleum (GWh)	Other Fuel (GWh)	TOTAL	% of Total
Non Domestic	231	250	145	92	718	24%
Domestic	776	260	66	111	1213	40%
Road Transport	0	0	1112	0	1112	36%
Rail	0	0	2	3	5	<1%
TOTAL	**1007**	**510**	**1325**	**206**	**3048**	**100%**
% of Total	**33%**	**17%**	**43%**	**7%**	**100%**	

Source: UK Local Authority & Regional Carbon Dioxide Emissions National Statistics; Department for Business, Energy & Industrial Strategy; 2021

Renewable Energy

- There are 2,138 renewable energy installations in the district, almost all of which are photovoltaics (2,132). They have a total capacity of 20.44 MW and energy generation of 23,186 MWh per year.

Renewable electricity technologies in Mid Sussex, as at end of 2019	Number of Installations	Installed Capacity (MW)	Generation (MWh per year)
Photovoltaics	2,132	19.61	17,753
Onshore Wind	5	0.02	44
Sewage Gas	1	0.8	5,388
TOTAL	**2,138**	**20.44**	**23,186**

Source: Renewable Energy by Local authority 2014-2019; Department for Business, Energy and Industrial Strategy; 2020

Natural Environment and Biodiversity

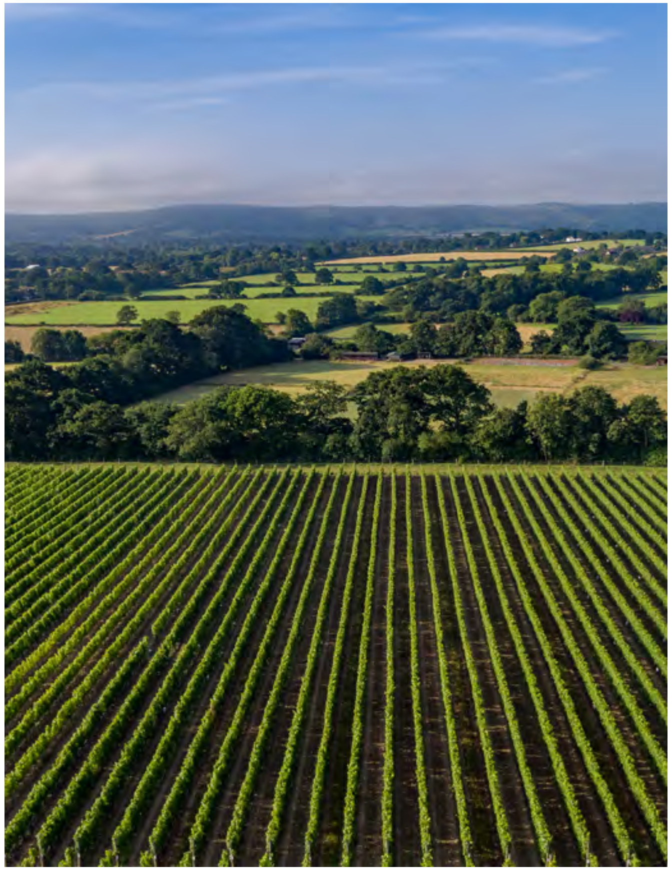
- Nearly half (49%) of the district is within the High Weald AONB and c.10% is located within the South Downs National Park.

- Mid Sussex is the tenth most wooded District in the South East and two-thirds of this woodland is classified as 'ancient'. Woodland covers 27% (9,158 Ha) of the District and ancient woodland 17% (5,741 Ha) of its area.

- It has many sites valued for their biodiversity including Sites of Special Scientific Interest, Sites of Nature Conservation Importance/ Local Wildlife Sites, Local Nature Reserves and Biodiversity Opportunity Areas. Nature Conservation sites cover 6% (1,938 Ha) of the District. 1.4% (476 Ha) of the district is covered by water and rivers.

- The District has over 1,000 Listed Buildings, 25 Ancient Monuments, over 500 Sites of Archaeological Interest, 36 Conservation Areas and 9 Registered Parks and Gardens. Conservation/heritage areas cover 1.3% (438 Ha) of the district and historic parks and gardens cover a further 1.3% (435Ha) of the district.

	Area (hectares)	Area (percent of district)
High Weald Area of Outstanding Natural Beauty (AONB)	16,353	49%
South Downs National Park (SDNP)	3,684	11%
Woodland	9,158	19.61
Ancient Woodland	5,741	17.2%
Nature Conservation	1,938	6.0%
Water & Rivers	476	1.4%
Conservation/Heritage Areas	438	1.3%
Historic Parks & Gardens	435	1.3%



Source: https://www.midsussex.gov.uk/media/4483/mid-sussex_design_guide-supplementary-planning-document_2019.pdf

Culture & Tourism

• The district has an important tourism offer with its quintessentially English countryside, encompassing the South Downs National Park and the High Weald Area of Outstanding Natural Beauty. It is renowned for its world-class gardens, historic houses, picturesque villages, and international award-winning vineyards. Mid Sussex is well connected for domestic and overseas visitors, with direct train links to London and Gatwick Airport.

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

• Supporting Visit East Grinstead to promote the medieval market town and tourist attractions in the north of the district such as vineyards, historic houses and heritage railway, parklands and outdoor activities. Details can be found here: www.visiteastgrinstead.com

• Working 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

• Working with Experience West Sussex partnership to promote tourism across the district and county.