

The State of the County

An Economic, Social and Environmental Audit of West Sussex

November 2006

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1 Introduction

1.1 Background

The West Sussex County Strategy sets out the County Council's ambitions for the period 2005-2009. The Strategy identifies four key issues to be addressed, which together will improve the quality of life of all the people of West Sussex both now and in the future. The four issues are:

- **Improving the quality of our neighbourhoods** - West Sussex should be a safe place to live and work and visit. The Strategy addresses crime and the fear of crime; road safety, improving the street scene and supporting better health for all in West Sussex
- **Enhancing and conserving the character and environment of West Sussex** - West Sussex is mainly a rural county and over half of the county lies in Areas of Outstanding Beauty. However, West Sussex is subject to considerable development pressure. There is a need to balance new development and infrastructure needed by communities in West Sussex, to reduce congestion and support a strong and vibrant local economy while maintaining the character of the County.
- **Developing services for children, young people and their families** - To bring about the best possible start in life and allow for children and young people to be healthier, to be safe, to achieve at school, to contribute responsibly and positively to their local community, and be well prepared for adult life and work.
- **Supporting those in need** - To help the most vulnerable people in our society and focus on ensuring people fulfil their potential, exercise control and choice over services they receive, enjoy enhanced life quality and are able to play an active role in their community whilst maintain their independence.

Each of these issues has its own challenges and conflicting demands, but each is more effectively pursued in unison with the others. For example, increased economic prosperity requires links to be made with employment and skills, and also requires land-use policies to be integrated with economic and environmental strategies. In addition, of course, many people wish to preserve our green and pleasant land or, in urban areas, do not want the extra congestion that more business activity may bring. Much of the Strategy cannot be delivered by the County Council on its own but will required the support of all partners.

1.2 This Report

West Sussex County Council commissioned Local Futures to undertake an Economic, Social and Environmental Audit for West Sussex in 2006. The Local Futures Audit has been developed in collaboration with the Audit Commission, the Local Government Association, and individual local authorities and partnerships. The basic thrust of the Audit is to compare and benchmark the performance of West Sussex against each sub-region in Britain, each region and Great Britain as a whole including the performance of each district in the county benchmarked nationally. Performance is assessed according to how well the County scores on a range of carefully selected benchmark indicators of economic, social and environmental well-being. One score is chosen as the 'main' or 'composite' indicator (often the score here is a combination of more than one set of data) and this score is chosen to rank all the comparator districts in the analysis. The district with the rank of '1' is the highest scoring district (sub-region or region) in the country.

There are specific geographies used in this report and the reasons for their use mostly pertain to the availability of data. First of all we have considered West Sussex as a sub-region rather than a county to give complete geographical coverage of Britain, just comparing to other counties would mean we miss out large parts of the country. Also, many county and sub-region boundaries coincide exactly. The sub-regional geographies used are the LSC boundaries, this is purely for ease of use with other geographical boundaries (districts, regions etc) and the availability of data.

The 'baseline' against which all the districts in the report are ranked against is all of the lowest tier local authorities in Britain (all districts and unitaries, of which there are 408). However, for some datasets national coverage is limited to England or England and Wales, in these cases the rankings are out of 354 and 370 respectively. The county is ranked against 54 sub-regions, there are in fact 53 LSC sub-regions but for the purposes of this report we have divided Sussex into East and West, thus creating an extra sub-region to benchmark against. And finally the South East is ranked against the 9 Government Office regions and Wales and Scotland (national coverage providing).

The results of the Audit can be used to inform the development and delivery of economic and social development policy in West Sussex. This report can also be used as an evidence base in order to advance West Sussex's economic and social development priorities with strategy and funding bodies.

The remainder of this report is structured as follows:

- **Chapter 2 – Economic Development**, covering: economic performance, industrial structure, business and enterprise, education and skills, and the labour market;
- **Chapter 3 – Social Profile**, covering: age and occupational structure, prosperity, deprivation and inequality, health, and crime;
- **Chapter 4 – Environment**, covering: housing, commercial and industrial property, transport and connectivity, services and amenities, and the natural environment;

- **Chapter 5 – Synthesis and Conclusions**, draws together the three broad sets of findings and discusses their implications for West Sussex.

The main body of the report draws on a selected number of benchmark indicators. This should be considered in conjunction with a Data Annex published as a separate report that provides a wider and more detailed set of economic, social and environmental indicators for West Sussex County Council to use at its own discretion.

2 Economic Development

2.1 Introduction

We begin by assessing the present state of West Sussex's economy in terms of its competitiveness at the sub-regional, regional and national levels. Strong economic foundations are critical to the future success of the county, creating quality employment opportunities for local people. The Audit examines five aspects of economic development that need to be 'joined-up' in the context of strategy, partnership and practical initiatives. The five aspects, each with their own benchmark indicators, are as follows:

- Macro-economic performance;
- Industrial structure;
- Business and enterprise;
- Skills and education;
- Labour market.

The results of our analysis of how West Sussex and its districts perform in respect of each of these aspects are presented below. At the end of the chapter we provide a composite picture which shows how these aspects inter-relate, and summarise our key findings on economic development in the County.

2.2 Macro-Economic Performance

Macro-economic performance has been examined using indicators for economic scale, productivity, and change. The indicators here are primarily to give context to the other findings in the economic section; they enable us to identify the true economic drivers in the comparator group and therefore the relative importance of their growth and productivity.

Beginning with **economic scale**, the Audit assesses scale in terms of both output and employment (workplace-based). The results are presented in Table 1.

- **West Sussex has a small economy, ranked as the 35th largest of 54 sub-regions in Great Britain.**

The West Sussex economy – measured by its share of national Gross Value Added (GVA) and share of national employment – is smaller than both national and regional figures (where the South East is second only to London in scale). Within the county Crawley has the largest economy and is the only district in West Sussex with a score over the GB average (100). Adur has by far the smallest economy and is one of the smallest in Great Britain.

Table 1: Economic Scale

LAD	Share of national GVA, 2003	Share of total national employment, 2004	Economic scale score	Economic scale score rank (out of 408)
Crawley	0.32	0.31	129.12	84
Chichester	0.23	0.19	85.75	164
Mid Sussex	0.21	0.20	84.63	165
Horsham	0.19	0.18	74.77	193
Worthing	0.18	0.17	72.54	203
Arun	0.16	0.16	64.48	232
Adur	0.07	0.07	28.47	382
West Sussex	1.36	1.28	70.00	35 (out of 54)
South East	15.03	13.99	159.57	2 (out of 11)
Great Britain	100.00	100.00	100.00	

Source: *localknowledge*, Local Futures

Our second measure of macro-economic performance is **productivity**. Table 2 shows the results.

- **West Sussex scores below average on our productivity score and is ranked 26th out of 54 sub-regions in Great Britain.**

The figures in Table 2 show that West Sussex's productivity is below the national and regional average. The county has a respectable figure for GVA per head (above the national average but below that for the South East) but its average weekly earnings are well below both national and regional figures.

Looking at the districts within the county, Crawley, the largest economy, is also the most productive and best paid in the group, ranking 47th nationally (out of 408). However, Adur, Mid Sussex and Worthing have above average GVA per head but below average earnings – bringing down the average for the county as a whole. Also, Chichester, the second largest economy in the county, has earnings and GVA per head below average.

Table 2: Productivity and Earnings

LAD	Average gross weekly earnings (workplace based), 2005	GVA per head 2003	Productivity score	Productivity score rank (out of 408)
Crawley	502.80	22,081.94	129.88	47
Horsham	418.60	18,384.05	108.13	95
Adur	370.90	16,289.16	95.81	151
Mid Sussex	369.60	16,232.07	95.47	153
Worthing	364.80	16,021.26	94.23	162
Chichester	340.60	14,958.45	87.98	202
Arun	310.50	13,636.52	80.21	285
West Sussex	379.51	17,051.00	92.81	26 (out of 54)
South East	437.80	19,110.37	112.16	2 (out of 11)
Great Britain	424.30	15,585.27	100.00	

Source: *localknowledge*, Local Futures

The final measure of macro-economic performance in our Audit is **economic change** in the past few years (see Table 3).

- **The West Sussex economy is ranked 40th of 54 sub-regions in Britain for economic growth.**

West Sussex has experienced below average growth according to our measure of economic change, scoring 61.3 on an index with Great Britain as 100. The number of jobs increased by 4.4 per cent over the 1998 to 2004 period; nationally the increase was 7.1 per cent and in the South East it was slightly lower at 6.6 per cent. Growth in earnings has been worse, growing by 13.5 per cent across the county, a figure just over half the national average.

Within these overall weak figures there has been considerable variation across the districts. At one end Crawley has been fulfilling its status as the largest economy and therefore main economic driver of the county by creating jobs at an above average rate, although its earnings growth has been on a par with national growth. Just below Crawley in the table Adur has also been growing quickly although, as noted in the scale section, this growth is from a very small economic base and, once more, earnings growth is below average. Chichester and Mid Sussex, on the other hand, have seen actual reductions in job numbers. Mid Sussex is one of only two districts nationally to see a reduction in average earnings.

Table 3: Economic Change

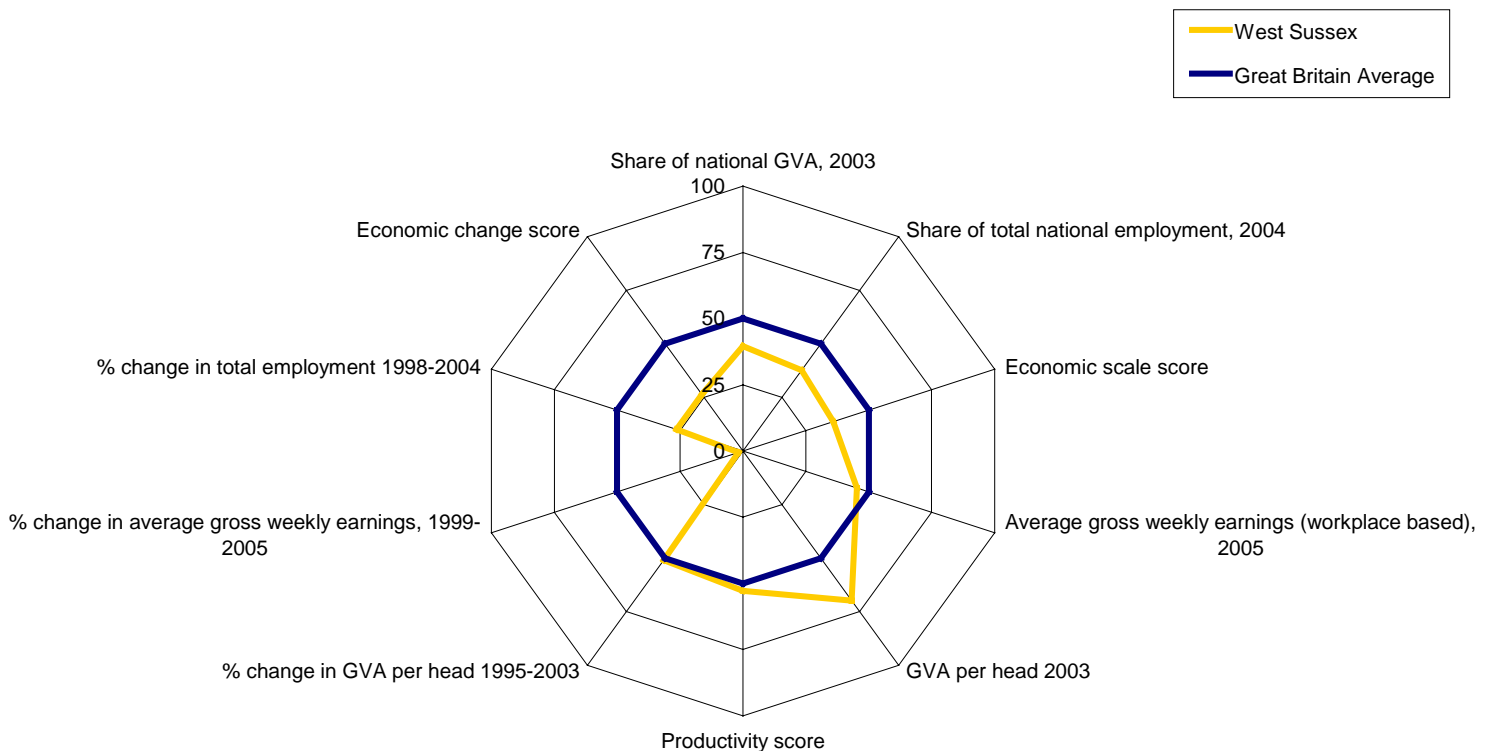
LAD	% change in GVA per head 1995-2003	% change in average gross weekly earnings, 1999-2005	% change in total employment 1998-2004	Economic change score	Economic change score rank (out of 408)
Crawley	46.59	23.24	9.97	140.46	148
Adur	46.59	16.34	9.03	127.19	172
Horsham	46.59	17.35	8.21	115.64	190
Worthing	46.59	15.85	5.12	72.04	246
Arun	46.59	11.33	4.00	56.37	265
Chichester	46.59	19.05	-1.41	-19.84	336
Mid Sussex	46.59	-2.40	-2.74	-38.56	352
West Sussex	46.59	13.53	4.35	61.31	40 (out of 54)
South East	58.05	20.87	6.64	93.54	6 (out of 11)
Great Britain	47.91	24.03	7.10	100.00	

Source: *localknowledge*, Local Futures

A summary of West Sussex's macro-economic performance is shown in Figure 1. The spider chart is a way of showing how the county rates against its peers. Every British sub-region's data is converted into a percentile, with the top-ranked area scoring 100, and the bottom zero. These can then be plotted on the chart to give a 'web' for each area. The more the web 'bulges' out towards the edge of the circle the higher the score on that indicator. In this chart, West Sussex's scores are compared with the British median.

West Sussex's macro-economic performance is below average on most indicators. It is small in scale but its reasonably high productivity has not resulted in higher earnings. Growth in jobs has kept pace with national trends in only part of the county so overall growth is below average. Growth in earnings is the worst in Britain when compared to other sub-regions with one district actually recording a decline.

Figure 1: Macro-Economic Performance



Source: *localknowledge*, Local Futures¹

¹ The chart displays the national ranking of West Sussex, converted to a percentile score (i.e. the top ranking sub-region scores 100% and the bottom ranking 0%)

2.3 Industrial Structure

Any area's economic performance is fundamentally shaped by its industrial structure. Throughout the global economy, the critical structural economic trend is the growth of the knowledge economy across and within all sectors. The Local Futures Audit assesses West Sussex's industrial structure from this knowledge economy perspective. We distinguish between knowledge-based production (aerospace, electrical machinery manufacture, printing & publishing, and chemicals & energy), and knowledge-based services (telecommunications, computing, R&D, finance & business services, and recreational & cultural services). These industrial groupings are based upon European Commission and OECD definitions, where individual industries are classified as knowledge-based if graduates make up at least 25 per cent of their workforce. The results of our assessment of the industrial structure of West Sussex are shown in Table 4.

- **West Sussex ranks 10th out of 54 sub-regions on our overall industrial structure score, indicating a larger than average knowledge economy.**

The knowledge economy in West Sussex accounted for 25.5 per cent of total employment in 2004 (compared to 23.3 per cent in Great Britain and 26.5 per cent in South East as a whole). As elsewhere in the country, the service sector makes up the bulk of this employment; 20.8 per cent compared to just 4.7 per cent in knowledge-driven production. In line with poor growth figures from the economic change section the county has seen an overall reduction of jobs in knowledge driven sectors. Once more the countywide figures conceal large variations between the districts within the county. Crawley has the largest knowledge economy in the county and the 13th largest in Britain. While growth in knowledge based employment in Crawley is well below average it is at least still positive. Three other districts - Horsham, Worthing and Mid Sussex - all have above average employment in knowledge driven sectors, although the latter two in this list have experienced decline (as is the case in Chichester). Arun and Adur have experienced strong growth in recent years but these are small economies and their impact on countywide performance is therefore not enough to counter falls in Worthing, Mid Sussex and Chichester.

Table 4: Industrial Structure

LAD	Proportion of employment in knowledge-driven production, 2004	Proportion of employment in knowledge-driven services, 2004	Proportion of employment in knowledge-driven sectors, 2004	% change in knowledge driven sector employment, 1998-2004	Proportion of employment in public services, 2004	% change in public services employment 1998-2004	Industrial structure score, 2004	Industrial structure score rank (out of 408)
Crawley	5.77	32.11	37.87	3.80	8.48	39.04	162.85	13
Worthing	7.33	19.52	26.85	-11.86	26.20	14.32	115.45	69
Horsham	4.08	21.56	25.65	34.22	18.64	17.73	110.28	77
Mid Sussex	3.79	19.87	23.66	-26.83	25.02	13.34	101.74	104
Adur	4.76	14.30	19.06	20.16	24.22	-3.57	81.97	180
Arun	4.51	12.96	17.47	30.83	24.75	15.96	75.10	222
Chichester	2.26	12.68	14.94	-7.21	25.51	-22.14	64.23	295
West Sussex	4.70	20.80	25.50	-0.40	20.29	6.12	109.63	10 (out of 54)
South East	4.07	22.42	26.49	9.87	20.34	21.28	113.90	2 (out of 11)
Great Britain	3.61	19.64	23.26	12.66	21.03	24.11	100.00	

Source: *localknowledge*, Local Futures

2.4 Business and Enterprise

A dynamic local enterprise culture is vital for the long-term competitiveness and overall success of any local economy. Table 5 shows the results of our Audit of business and enterprise in West Sussex.

- **West Sussex is ranked 45th out of 54 sub-regions in Great Britain on our overall index of business and enterprise.**

Is West Sussex a good place to do business? Business density in the County is above the national average (43.4 firms per 1,000 population compared to 38 in Great Britain) but slightly below that for the South East. Conditions vary across the county with Mid Sussex, Horsham and Chichester recording very high business densities while Crawley's is very low. The cause of Crawley's low figure is explained by its dependence on larger businesses. Crawley has the highest average business size in Britain making it the most dependent on large firms in the country.

The Local Futures Enterprise Index is composed of the new business formation rate, the sub-regional survival rate and the growth in business stock over the last 5 years. On this index, where the Great Britain average is 100, West Sussex scores 90.8. The survival rate is good across the county but formation rates and growth in stock over the last 5 years are very low by national standards. Only Crawley has a formation rate above the national average, although Crawley and Worthing have both seen declines in their total stock over the last 5 years. Closure rates are high, particularly in Worthing and Crawley. Self employment is high across the board in West Sussex with every district recording a figure above the national average. Nationally self-employment is strongly correlated with business density; this is also the case in West Sussex where Horsham and Mid Sussex have high rates on both measures.

Table 5: Business and Enterprise

LAD	Business per 1000 population, 2005	Average business size, 2004	New business formation rates, 2004	Business closure rate, 2004	Self employment rate, 2004	% change in total VAT registered business stock, 2000-2005	New business survival rate (24 months from 2000)	Business & enterprise score	Business & enterprise score rank (out of 408)
Mid Sussex	52.49	8.01	9.12	9.30	9.42	7.10	81.63	105.70	107
Horsham	56.21	7.29	8.98	9.96	11.26	4.75	81.63	103.02	149
Adur	32.47	8.68	8.95	8.63	8.00	7.17	81.63	101.64	165
Worthing	33.35	11.68	9.35	11.59	9.25	-4.03	81.63	95.26	240
Arun	35.33	7.57	8.61	10.85	9.40	1.59	81.63	92.37	279
Chichester	56.95	8.22	7.71	8.98	7.86	1.92	81.63	91.68	287
Crawley	29.09	22.41	10.33	11.65	7.55	-3.45	81.63	90.28	300
West Sussex	43.40	9.82	8.86	10.01	9.12	2.63	81.63	90.82	45 (out of 54)
South East	43.98	10.01	9.88	9.84	8.70	6.16	81.09	105.63	2 (out of 11)
Great Britain	37.52	11.57	10.08	9.94	7.41	5.07	79.34	100.00	

Source: *localknowledge*, Local Futures

2.5 Education and Skills

The knowledge economy is powered, above all, by human capital, and a good blend of academic and vocational skills will be critical to the future success of West Sussex. In the Local Futures Audit, local levels of education and skills are assessed in terms of the qualifications profile of the working age population (i.e. the available workforce). The results are presented in Table 6.

- **West Sussex performs well in respect of education and skills, ranking 15th out of 54 sub-regions on our overall score.**

The Local Futures skills and qualifications score is a composite measure based on each of the four NVQ levels, with greater weighting attached to the higher levels. On this measure West Sussex does very well, ranking 15th out of 54 sub-regions and scoring over the national average but below that for the South East. The proportion of those residents in “skills poverty” (below NVQ 2) is lower than average but the proportion of those with higher level (NVQ 4 and above) is also lower than average. West Sussex’s skills profile is more skewed toward level 3 qualifications than normal. However, levels of skills are perhaps the area where conditions within the county are most varied. The highest ranking district, Horsham, has the 10th best skills profile in Britain while Adur is ranked 334 out of 408 districts nationally, a difference of 324 places. The Government describes NVQ2 as its minimum standard for skills so those qualified below this level are described as being in “Skills Poverty”. The county scores well on this indicator (below NVQ2) with figures below the national average and on a par with the South East, the highest performing region in England on this measure. The county figures on skills poverty are good but in two districts, Adur and Arun, figures are well above the national average and leave Adur in the bottom 20 per cent of authorities nationally on this indicator. The county’s skew towards level 3 qualifications is the result of very high levels found in Arun, Chichester, Worthing and Horsham while in Mid Sussex’s levels are very low. Looking at school performance West Sussex’s GCSE attainment is good nationally but below the South East average. Once more there is huge variation between districts; Horsham and Mid Sussex have exceptional GCSE pass rates but Adur’s are the second lowest in Britain.

Table 6: Education and Skills

LAD	Proportion of working population qualified below NVQ 2 2004	Proportion of working population with NVQ 2 2004	Proportion of working population with NVQ 3 2004	Proportion of working population with NVQ 4+ 2004	Proportion of employees who have received job training in last 13 weeks, 2003-2004	Percentage of pupils achieving 5+ GCSEs grades A*-C 2004/05	Skills & qualifications score	Skills & qualifications score rank (out of 408)
Horsham	20.89	23.80	24.41	30.90	27.54	68.60	116.74	10
Mid Sussex	27.52	20.90	16.83	34.76	26.03	68.00	109.43	60
Worthing	29.71	25.16	23.51	21.63	37.54	49.70	104.68	108
Chichester	31.60	21.52	22.05	24.84	29.48	54.80	104.32	117
Arun	38.70	19.17	21.93	20.19	34.13	45.90	96.69	266
Crawley	37.19	23.71	17.53	21.57	23.10	52.70	95.55	280
Adur	40.56	22.40	18.11	18.93	31.77	35.00	92.10	334
West Sussex	31.54	22.21	20.78	25.47	0.00	55.13	103.88	15 (out of 54)
South East	31.46	20.61	19.05	28.89	30.90	57.00	105.49	2 (out of 11)
Great Britain	35.07	20.85	18.33	25.74	30.32	54.54	100.00	

Source: *localknowledge*, Local Futures

2.6 Labour Market

The final aspect to be considered within the economic development section of the Local Futures Audit is the labour market characteristics of West Sussex. Compared to the EU average, Britain has a less regulated labour market and enjoys relatively high employment rates and low unemployment. Table 7 provides a summary of labour market conditions in the County.

- **West Sussex performs very well in respect of its labour market, ranking 11th out of 54 sub-regions in the country.**

The employment rate in West Sussex stood at 79.4 per cent in 2004, a figure slightly higher than that found in the South East (78.9 per cent) and well above the national average (74.4 per cent) and the EU Lisbon Strategy target of 70 per cent. Despite variations within the county not one district has an employment rate below the national average and Worthing has one of the highest employment rates in the country.

In line with these high figures unemployment, on both measures (ILO and claimant count), are very low. ILO unemployment is 3.2 per cent in West Sussex, below both the national and regional figures. The claimant count figures are even more impressive with a figure of 1.5 per cent, which is less than half the national average of 2.7 per cent. Only Arun approaches the national average for ILO unemployment and claimant count rates are low across the board. A rate of 0.9 per cent in Mid Sussex puts the district in the bottom 5 per cent of authorities in Britain.

However, as is often the case in areas with low unemployment, the proportion of unemployment that is “long-term” is actually quite high in West Sussex. Horsham and Adur have the highest rates of long-term unemployment in the county and both rank in the top 10 per cent of authorities nationally. Youth unemployment is low apart from Arun, which has a very high figure that stands out from the rest of the comparator group and is twice the national average. Although it should be pointed out that this is a high proportion of a very low level of unemployment.

Table 7: Labour Market

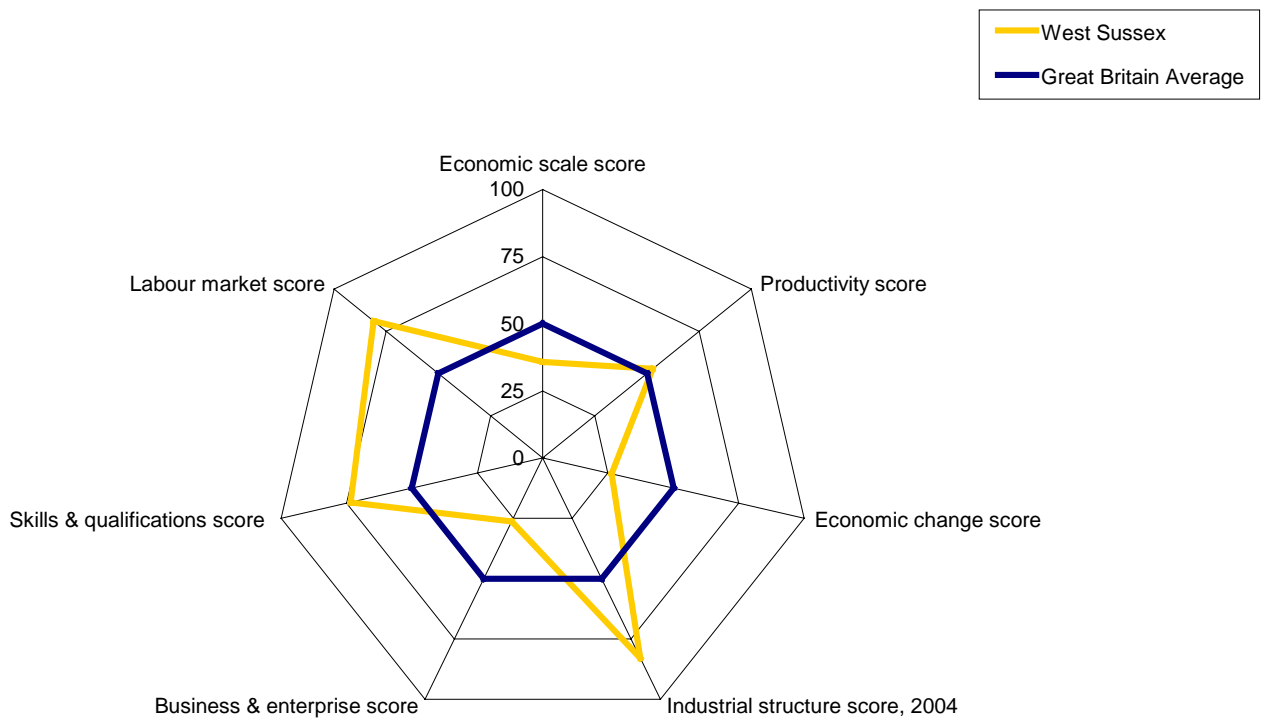
LAD	Employment rate, 2004	Inactivity due to long-term sickness, 2005	ILO Unemployed 2004 (res based)	Claimant count rate, April 2006	Long term unemployment as a proportion of all unemployment, April 2006	Proportion of 18-24 year olds who are unemployed, 2004 (res based)	% change in employment rate 99/00 - 03/04	Labour market score	Labour market score rank (out of 408)
Worthing	84.70	-	2.17	1.70	13.47	6.70	3.53	113.83	7
Horsham	81.90	-	4.02	1.20	20.62	8.20	-0.12	110.07	35
Adur	80.70	3.60	3.48	1.70	18.72	8.60	8.69	108.46	70
Mid Sussex	80.20	-	2.47	0.90	12.93	6.40	0.00	107.78	82
Chichester	77.80	5.00	1.03	1.60	12.50	0.00	5.46	104.56	173
Arun	76.30	8.50	4.62	1.80	14.37	14.10	-5.04	102.54	220
Crawley	75.50	4.50	4.26	1.80	14.26	6.00	2.21	101.47	245
West Sussex	79.43	3.19	3.21	1.49	15.01	5.61	1.48	106.75	11 (out of 54)
South East	78.89	6.60	3.48	1.70	12.98	5.42	-1.13	106.39	1 (out of 11)
Great Britain	74.41	7.30	4.56	2.65	14.40	6.88	0.54	100.00	

Source: *localknowledge*, Local Futures

2.7 Summary

A summary of West Sussex's economic development profile is presented in Figure 2. West Sussex has a small economy by national standards but it is a productive one with a well developed knowledge economy. However, growth in both earnings and jobs has been weak and levels of enterprise poor. On a more positive note the county has an enviable labour market position and a highly skilled local workforce.

Figure 2: Economic Development Summary



Source: *localknowledge*, Local Futures²

² The chart displays the national ranking of West Sussex, converted to a percentile score (i.e. the top ranking sub-region scores 100% and the bottom ranking 0%)

3 Social Profile

3.1 Introduction

The Local Futures Audit assesses six aspects of West Sussex's social profile, including:

- Demography and migration;
- Occupational structure;
- Wealth;
- Deprivation and inequality;
- Health;
- Crime.

The results of this analysis are presented below; at the end of the chapter we provide a composite picture of our findings and summarise the discussion.

3.2 Demography and Migration

West Sussex's demographic characteristics have a fundamental influence on the County's social and economic development. Table 8 shows the **age profile** of West Sussex.

- **The average age in West Sussex was 41.4 years, meaning that the county has one of the 'oldest' populations in the country (ranked 5th of 54 where 1st is the oldest sub-region).**

The average age in West Sussex was 41.4 years in 2001, compared to 38.7 years in Great Britain and 39.1 years in the South East. In each of the county's districts the average age is above the national average with the exception of Crawley, which has one of the youngest age profiles in Britain.

In line with these figures West Sussex has a far higher proportion of 25 to 44 year olds and 65+ age groups, both of which combine to push West Sussex's dependency ratio above the 100 national benchmark. Adur, Chichester, Worthing and Arun have some of the highest dependency ratios in Britain, all of these districts rank in the top 5 per cent nationally on this indicator.

The other factor associated with an older population nationally is a lower birth rate, and West Sussex is no exception. The number of live births per 1,000 of the population is 10.6 in West Sussex, well below the national average, with Crawley once more being the only exception and recording a figure over the national average.

Table 8: Age Profile

LAD	Proportion of population aged 0-14, 2004	Proportion of population aged 15-24, 2004	Proportion of population aged 25-44, 2004	Proportion of population aged 45-64, 2004	Proportion of population aged 65+, 2004	Live births per 000 population, 2005	Dependency ratio, GB=100, 2004	Average age, 2001	Average age, 2001 rank (out of 408)
Arun	15.73	9.63	22.52	26.06	26.06	9.30	122.33	44.71	8
Chichester	16.32	10.82	22.91	26.95	23.01	9.08	115.11	43.30	14
Worthing	17.04	10.10	26.84	23.57	22.45	11.38	115.60	42.73	28
Adur	17.34	10.61	24.58	25.93	21.55	9.85	113.84	42.19	38
Mid Sussex	18.74	10.62	26.78	27.01	16.86	11.11	104.20	39.85	151
Horsham	19.41	9.62	26.78	27.11	17.08	10.36	106.81	39.81	155
Crawley	19.33	12.75	31.28	21.96	14.68	13.22	99.55	36.82	365
West Sussex	17.68	10.51	25.84	25.66	20.32	10.56	107.46	41.40	5 (out of 54)
South East	18.22	12.29	28.12	24.84	16.53	11.58	101.73	39.08	5 (out of 11)
Great Britain	17.93	12.20	27.75	25.30	16.81	12.17	100.00	38.65	

Source: *localknowledge*, Local Futures

The second aspect of West Sussex's demographic profile relates to **migration and population change**. The results are displayed in Table 9.

- **The population of West Sussex grew at an above average rate between 1991-2004, ranking 16th out of 54 sub-regions in Great Britain.**

With a population increase of 7.33 per cent between 1991-2004, West Sussex recorded a growth rate almost twice the national average of 4.1 per cent. This figure is also above that for the region. Despite this large growth there is still variation within the county; Worthing, Adur and Mid Sussex have all recorded growth below the national average with Worthing hardly growing at all. Elsewhere, some districts have managed growth rates far above the national average, with Horsham, Crawley and Arun leading the way on this indicator.

In keeping with figures describing growth in the local population the turnover of population in West Sussex is above average, with a high proportion of people moving into the area from within the UK.

Table 9: Migration and Population Change

LAD	Proportion of residents moved into the area from within the UK, 2001	Proportion of residents moved into the area from outside the UK, 2001	Proportion of residents moved out of the area, 2001	Net migration, 2001	Change in resident population 1991-2004	Population change score rank (out of 408)
Horsham	4.92	0.63	4.61	0.94	13.75	32
Crawley	3.91	0.72	4.34	0.28	11.79	56
Arun	4.88	0.31	3.77	1.42	10.61	73
Chichester	5.45	0.74	5.40	0.79	6.87	148
Mid Sussex	4.37	0.69	4.71	0.35	3.34	252
Adur	4.81	0.31	4.25	0.86	1.28	294
Worthing	4.80	0.43	4.09	1.14	0.83	302
West Sussex	4.74	0.56	4.45	0.84	7.33	16 (out of 54)
South East	5.23	0.89	5.15	0.98	6.31	5 (out of 11)
Great Britain	4.03	0.65	4.03	0.65	4.11	

Source: *localknowledge*, Local Futures

The third aspect of West Sussex's demographic profile assessed in the Audit relates to **ethnicity**. Table 10 shows the results.

- **The non-white population in West Sussex is relatively small, with the county ranking 26th out of 54 sub-regions in terms of ethnic diversity.**

In 2001, 96.6 per cent of the resident population of West Sussex were classified as white, well above the national figure of 91.9 per cent, and also higher than the regional average. Within West Sussex's ethnic minority population, the Asian population is the largest ethnic group, forming 1.66 per cent of the total population, but this figure is around a third of the national average.

It seems that West Sussex's BME population is almost entirely located in Crawley, which ranks 52nd of 408 nationally, with 11.5 per cent of its population classified as "non-white". The next highest figure in the county is 2.8 per cent in Worthing which is considerably lower but is because of the distribution of this indicator (which is highly skewed towards large urban areas).

Table 10: Ethnicity

LAD	Proportion of population classified as White, 2001	Proportion of population classified as Mixed, 2001	Proportion of population classified as Asian or British Asian, 2001	Proportion of population classified as Black or British Black, 2001	Proportion of population classified as Chinese or Other Ethnic group, 2001	Proportion of population classified as non-White, 2001	Proportion of population classified as non-White rank, 2001 (out of 408)
Crawley	88.53	1.38	8.32	1.11	0.65	11.47	52
Worthing	97.22	0.91	0.94	0.32	0.61	2.78	159
Mid Sussex	97.35	0.90	0.88	0.26	0.60	2.65	166
Adur	97.48	0.96	0.84	0.25	0.46	2.52	172
Horsham	97.81	0.74	0.55	0.28	0.61	2.19	187
Chichester	98.36	0.62	0.35	0.20	0.48	1.64	242
Arun	98.48	0.55	0.44	0.22	0.31	1.52	256
West Sussex	96.61	0.84	1.66	0.37	0.53	3.39	26 (out of 54)
South East	95.10	1.07	2.32	0.71	0.78	4.90	6 (out of 11)
Great Britain	91.90	1.18	4.08	2.01	0.83	8.10	

Source: *localknowledge*, Local Futures

The fourth and final aspect of West Sussex's demography to be considered is **household structure** (see Table 11).

- **Average household size in West Sussex is low, with the county ranked 44th out of 54 sub-regions in the country (where 1st has the largest household size).**

The average household size in West Sussex in 2001 was 2.35 people, below the national figure of 2.41. The high proportions of couples without children are the main reason for the small household size. The proportion of one person households is around the national average and the proportion of one parent households is low. However, Crawley and Worthing both have high levels of lone parent households. Combining the results from the county's age profile section we find that the county has an abundance of older households without children who are living alone.

Table 11: Household Structure

LAD	Proportion of one person households, 2001	Proportion of households comprising of married couples with no children, 2001	Proportion of households comprising of married couples with dependent children, 2001	Proportion of lone parent households, 2005	Average household size, 2001	Average household size rank, 2001 (out of 408)
Crawley	26.84	11.93	18.99	8.80	2.47	88
Mid Sussex	26.88	15.67	21.64	5.90	2.45	116
Horsham	26.65	16.37	21.48	3.30	2.44	140
Chichester	30.13	15.31	16.39	5.40	2.32	337
Adur	31.10	13.47	15.84	3.20	2.30	358
Arun	32.80	14.13	14.53	3.00	2.24	390
Worthing	36.38	12.01	15.13	8.20	2.21	395
West Sussex	30.11	14.27	17.78	5.31	2.35	44 (out of 54)
South East	28.52	14.09	18.97	5.40	2.43	2 (out of 11)
Great Britain	30.27	12.97	17.48	7.20	2.41	

Source: *localknowledge*, Local Futures

3.3 Occupational Profile

The occupational profile of West Sussex is a useful indicator of the County's progress towards developing a diverse, prosperous, knowledge-based economy. Knowledge-driven activities generate increased demand for 'higher end' occupations including managerial, professional and technical workers. In the Local Futures Audit, occupational structure is considered in terms of the proportion of the resident workforce employed in the four main NVQ-linked occupational groups (based on the standardised competences and skills requirements of each occupation). Table 12 shows the results.

- **West Sussex performs well in respect of the proportion of knowledge workers in the workforce, ranking 13th out of 54 sub-regions in Great Britain.**

In line with the findings in the education and skills section West Sussex performs above average on the proportion of knowledge workers amongst the employed workforce. However, while West Sussex's score is above average nationally, it is below that for the South East. Only one district, Adur, scores below the national average benchmark of 100.

Looking at the four occupational groups West Sussex has a higher than average level of managerial and professional occupations but, again, lower than the South East. At the other end of the scale the occupational profile is skewed away from elementary occupations.

Once more, the countywide figures obscure variations at the district level; Horsham has a very high level of managerial and professional occupations, whereas Adur has very low levels (these findings correlate closely with those from the skills section). Crawley and Adur have the highest levels of elementary occupations in the county and there is some distance between these 2 districts and the rest of the group.

Table 12: Occupational Profile

LAD	Manager and professional occupations (level 4), 2004	Skilled technical occupations (level 3), 2004	Lower skilled occupations (level 2), 2004	Elementary occupations (level 1), 2004	Knowledge worker score	Knowledge worker score rank (out of 408)
Horsham	35.74	26.49	26.96	10.82	127.24	38
Mid Sussex	30.05	29.59	33.84	6.53	122.96	50
Worthing	28.34	26.35	36.93	8.38	121.09	57
Arun	29.64	26.06	34.53	9.77	113.54	101
Crawley	27.73	19.92	42.97	9.38	103.38	149
Chichester	27.90	28.92	31.16	12.02	100.43	172
Adur	23.37	20.62	43.30	12.71	89.38	255
West Sussex	29.60	25.90	34.84	9.66	107.35	13 (out of 54)
South East	31.00	25.47	33.55	9.98	114.10	2 (out of 11)
Great Britain	27.42	25.19	35.78	11.61	100.00	

Source: *localknowledge*, Local Futures

3.4 Prosperity

The Local Futures Audit considers prosperity in terms of a range of indicators, including total income, house prices, and social data such as the number of cars per household. Table 13 shows the results.

- **Prosperity in West Sussex is above average, with the county ranked 11th out of 54 sub-regions on our overall score.**

On the national map West Sussex is on the periphery of the area of high incomes emanating out from London, but these income levels tend to drop as we approach the coast. Nationally, there is a strong correlation between the presence of knowledge workers and levels of prosperity in the local population. This relationship illustrates West Sussex's position in terms of prosperity, where in 2003/04 the average income in West Sussex was £23,393; above the national figure (£22,100) but below the regional figure (£25,313). Looking at the rest of the comparator group there is a mixture of districts above and below the national average. Chichester, Horsham and Mid-Sussex all have very high figures, ranking them in the top quintile nationally. At the other end Adur, Arun, Worthing and Crawley all have figures below the national average. Crawley's profile is particularly worthy of note as this district had by far the highest earnings in the economic performance section of this report. Importantly, however, these figures are "residence" based while the earnings figures are workplace based – suggesting that Crawley's residents are not able to take full advantage of the district's local employment opportunities. This finding is considered further in the transport section. Incomes tend to be correlated with house prices nationally so West Sussex's average house prices are over the national average. House prices and levels of earnings and incomes have important consequences for affordability in West Sussex (discussed in the section on housing).

Table 13: Prosperity

LAD	Average Total income, 2003-04	Average house price, Jan-March 2006	Proportion of all households with 2+ cars, 2001	Average number of rooms per household, 2001	% change in average total income 1999/00 - 2003/04	Prosperity score	Prosperity score rank (out of 408)
Mid Sussex	28,100	240,906	43.28	5.81	11.51	126.85	44
Horsham	27,100	253,866	47.71	5.90	3.44	122.33	53
Chichester	25,500	275,214	39.83	5.81	12.33	115.11	68
Crawley	20,800	190,397	33.21	5.31	20.93	93.90	185
Worthing	20,300	186,401	28.13	5.04	3.57	91.64	212
Arun	20,100	206,125	31.26	5.24	17.54	90.74	218
Adur	19,000	201,988	30.09	5.07	17.28	85.77	268
West Sussex	23,393	224,760	36.72	5.48	11.31	105.86	11 (out of 54)
South East	25,313	228,762	37.95	5.57	12.56	119.73	2 (out of 11)
Great Britain	22,098	193,799	28.77	5.29	12.44	100.00	

Source: *localknowledge*, Local Futures

3.5 Deprivation and Inequality

The Government's standard measure of deprivation and inequality in England is the Index of Multiple Deprivation (IMD). The IMD covers a number of aspects of deprivation including disadvantage in: education; income; employment; health; and housing. In this Audit we consider the IMD as a whole, as well as each of its individual components. Table 14 displays the results.

- **Overall levels of deprivation are very low – the County is ranked as the 44th most deprived sub-region of 48 in England.**

Deprivation is low in West Sussex; the most deprived district in the county is Adur, but this district only ranks 179th for deprivation out of 354 (where 1 is the most deprived). The one domain where the county does score above average is in the barriers to housing services domain. This is no doubt caused by the county's higher than average house prices – which are discussed in more detail in the housing section.

The Local Futures inequality indicator is designed to highlight any large differences in deprivation, as county and district wide data can sometimes mask pockets of deprivation at the small area level. The inequality indicator is measured as the difference between the highest and lowest ranking SOA in each district. On this measure Worthing has the highest level of inequality in the county, but two other districts (Arun and Crawley) also score above the national benchmark level of 100.

The skills section found that despite an overall good skills profile in West Sussex some districts had quite poor skills profiles by national standards. These findings are reflected in the education domain of the IMD where Adur ranks 72nd nationally and Crawley also score above the national average on this indicator.

Table 14: Deprivation and Inequality

LAD	Index of Multiple Deprivation, Average SOA Score, 2004	Inequality (range of IMD ranks), 2004	Indices of Deprivation, Income Deprivation Domain Average SOA Score, 2004	Indices of Deprivation, Employment Deprivation Domain Average SOA Score, 2004	Indices of Deprivation, Health Deprivation and Disability Domain Average SOA Score, 2004	Indices of Deprivation, Education, Skills and Training Deprivation Domain Average SOA Score, 2004	Indices of Deprivation, Barriers to Housing and Services Deprivation Domain Average SOA Score, 2004	Indices of Deprivation, Crime Domain Average SOA Score, 2004	Indices of Deprivation, The Living Environment Deprivation Domain Average SOA Score, 2004	Inequality score	Deprivation score	Deprivation score rank (out of 354)
Adur	17.01	23472.00	0.10	0.07	-0.31	27.82	25.65	-0.20	19.12	93.61	90.11	179
Worthing	15.74	27110.00	0.10	0.08	-0.09	16.18	20.62	-0.29	19.83	108.12	83.38	198
Arun	15.56	25533.00	0.10	0.08	-0.29	19.73	25.41	-0.28	12.85	101.83	82.43	204
Crawley	14.75	25094.00	0.09	0.06	-0.66	22.43	30.50	-0.19	8.56	100.08	78.14	215
Chichester	10.70	21946.00	0.08	0.06	-0.98	10.87	25.74	-0.86	15.26	87.52	56.68	279
Horsham	6.65	15237.00	0.05	0.04	-1.59	6.72	24.81	-1.01	7.22	60.77	35.23	342
Mid Sussex	6.38	21903.00	0.05	0.04	-1.34	6.93	20.82	-0.91	7.54	87.35	33.80	346
West Sussex	12.40	22899.29	0.08	0.06	-0.75	15.81	24.79	-0.53	12.91	91.32	65.68	44 (out of 48)
South East	13.19	32125.00	0.09	0.06	-0.71	15.75	22.80	-0.39	14.58	99.43	59.35	9 (out of 9)
England	18.88	25074.58	0.12	0.10	-0.16	19.76	21.79	-0.22	18.59	100.00	100.00	

Source: *localknowledge*, Local Futures

3.6 Health

Nationally there have been major improvements in public health over the course of the previous century, with big increases in life expectancy. However, this overall picture masks significant geographical variations and health inequality. Poor health has a detrimental impact on quality of life and restricts peoples' ability to participate fully in the labour market. Table 15 presents a set of key indicators showing the state of public health in the West Sussex:

- **West Sussex is one of the most healthy areas in the country as measured by life expectancy, ranking 3rd out of 54 sub-regions in Great Britain.**

The national map of life expectancy is one of the clearest illustrations of the North-South divide in Britain, and West Sussex's health conditions fit firmly into this relationship. Average life expectancy in West Sussex was 80.1 years in 2002-04, compared to 78.5 years nationally. Within the county every district has a life expectancy higher than the national average and only Worthing and Adur have rates below the South East figure. If we look at some of the main determinants of healthiness – the estimated incidence of obesity, and smoking, cancer and circulatory disease mortality – we see that West Sussex performs well overall. Only on the measure of obesity does the county score over the national average, but it should be noted that this is based upon synthetic estimates rather than actual data. Again the districts vary around the county wide figures; of particular note all of the districts' cancer and circulatory mortality rates are below the national average and Horsham has one of the lowest rates in Britain. As would be expected of an area with such good health conditions the impact of poor health on worklessness is not significant with low rates of incapacity benefit claimants across the county.

Table 15: Health

LAD	Infant Mortality Rate, 2004	Average life expectancy (Years) 2002-2004	Standardised Mortality Ratio, 2003	Proportion of residents who smoke, 2001	Proportion of residents who are obese, 2001	Cancer mortality rates per 100,000 population, 2002/04	Circulatory disease mortality rates per 100,000 population, 2002/04	Incapacity benefits claimants per 1000 working age population, November 2004	Health score	Health score rank (out of 408)
Horsham	2.30	81.15	81.00	18.01	20.21	95.50	58.50	24.87	102.93	13
Chichester	7.30	80.47	87.00	20.55	21.54	112.90	65.20	34.90	102.06	56
Crawley	3.00	80.27	90.00	27.36	23.25	109.80	75.90	43.83	101.81	72
Arun	3.20	79.98	94.00	24.33	23.59	113.80	85.40	47.42	101.44	101
Mid Sussex	7.80	79.91	93.00	18.14	20.69	105.40	67.20	24.82	101.35	110
Adur	5.10	79.67	98.00	25.70	22.83	119.80	83.10	42.38	101.04	132
Worthing	4.70	79.05	103.00	25.50	21.99	113.40	90.80	59.47	100.26	196
West Sussex	4.73	80.11	91.65	22.40	21.96	109.16	74.34	38.54	102.05	3 (out of 54)
South East	3.90	79.80	93.00	23.03	21.43	113.50	81.40	38.98	101.73	2 (out of 11)
Great Britain	5.07	78.51	100.00	24.18	20.49	121.60	96.70	65.43	100.00	

Source: *localknowledge*, Local Futures

3.7 Crime

Table 16 considers a set of indicators regarding crime within West Sussex.

- **Overall levels of crime are very low in West Sussex and the County ranks 44th out of 50 sub-regions in England (where 1st has the highest levels of crime).**

In 2004/05 there were 28.6 offences per 1,000 of the population in West Sussex, compared to 42.5 in England & Wales as a whole, and 33.7 in the South East. Based on these figures crime levels are extremely low in West Sussex and the county ranks 44th out of 50 sub-regions. Looking at different types of crime the figures are below the national average in every category, but the number of dwelling burglaries per 1,000 of the population is particularly low, around half the national average.

Looking at the individual districts only Crawley has a number of offences above the national average, although its burglary rates are still very low. Horsham, on the other hand, has a very low level of total offences.

There has been a slight increase in recorded crime in the county; the number of crimes per 1,000 of the population increased by 1.1 per cent over the 1999 to 2004 period. Importantly, this increase is in the context of the introduction, in 2002, of the National Crime Recording Standard, which has had the effect of boosting crime figures nationally. This figure puts West Sussex in the bottom quartile of all sub-regions nationally for changes in crime. This overall figure masks different trends in crime for the individual districts of West Sussex; Crawley, Worthing, Arun and Chichester have all seen decreases in offences while Adur, Mid Sussex and Horsham have seen increases.

Table 16: Crime

LAD	Total offences per 1000 population, (2004/05)	Vehicle crimes per 1000 population, (2004/05)	Violent crimes per 1000 population, (2004/05)	Dwelling burglaries per 1000 population 2004/05	% change in total offences per 1000 population, 1999-2004	Crime score	Crime score rank (out of 354)
Crawley	43.21	13.10	26.58	3.52	-2.53	116.20	104
Worthing	35.34	9.96	21.92	3.46	-1.98	95.05	170
Adur	31.01	11.40	15.64	3.97	13.30	83.40	209
Arun	30.40	10.19	16.64	3.56	-3.09	81.74	215
Chichester	22.37	8.57	11.05	2.74	-13.29	60.15	310
Mid Sussex	22.31	7.93	11.91	2.48	9.60	60.00	311
Horsham	20.18	6.07	11.34	2.77	21.37	54.28	332
West Sussex	28.60	9.35	16.09	3.15	1.05	67.28	44 (out of 50)
South East	33.72	11.12	18.31	4.29	9.24	81.11	9 (out of 10)
England & Wales	42.50	13.99	22.43	6.09	4.73	100.00	

Source: *localknowledge*, Local Futures

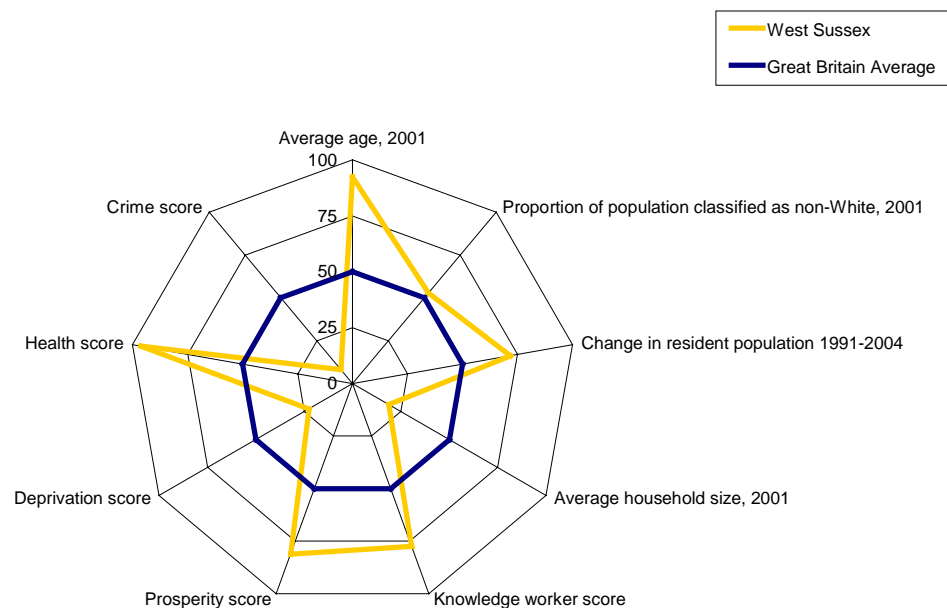
3.8 Summary

Figure 3 presents a summary spider diagram showing key indicators of the social profile of West Sussex.

Overall West Sussex has excellent social conditions with low crime, good health and relative prosperity. The County's social profile is very much tied to its economic profile, as set out in Chapter 2. The occupational profile reflects the skills profile, with above average numbers of people working in high skill NVQ4 equivalent occupations. These workers form the bedrock of the knowledge economy, and this goes some way towards explaining the development of a knowledge economy in West Sussex. Since higher end managerial occupations are also better paid, it is not surprising that West Sussex performs well in terms of prosperity.

Demographically, the population of West Sussex is growing moderately with a low turnover of population. Quality of life indicators such as health and crime are very good and deprivation is very low.

Figure 3: Social Profile Summary



Source: *localknowledge*, Local Futures³

³ The chart displays the national ranking of the County, converted to a percentile score (i.e. the top ranking sub-region scores 100% and the bottom ranking 0%)

4 Environment

4.1 Introduction

The third and final section of the Local Futures Audit looks at a number of aspects of the environment and quality of life in West Sussex. In this Audit we consider the environment in terms of:

- Housing;
- Commercial and industrial property;
- Transport and connectivity;
- Access to services and amenities;
- The natural environment.

The results of this analysis are presented below. As previously, we provide a composite picture of the environment in West Sussex at the end of the chapter, together with a short summary of the key points.

4.2 Housing Affordability, Tenure and Condition

In the Local Futures Audit, housing is considered in terms of affordability (assessed on the basis of the ratio between average earnings and average house prices), and housing condition information. Table 17 shows the results.

- **West Sussex is one of the least affordable parts of the country to buy a house, ranking 41st of 50 sub-regions in England & Wales (where 1st is the most affordable).**

The average house price in West Sussex was £224,760 in January-March 2006, more than the national average by some margin (£193,799) but just below the regional average. Within the county only Crawley and Worthing have house prices below the national average. Combining the average house price with average earnings yields an affordability index, the higher the score the more affordable. On this score (where GB = 100) West Sussex performs poorly with a score of 90.4 and a national ranking of 41 out of 50 sub-regions. However, it must also be borne in mind that this figure is relative to the GB average and levels of affordability have reduced considerably over the last few years nationwide. In 1999 the ratio of house prices to earnings in West Sussex was 6.1 to 1, considerably more than the national figure of 4.2 to 1 and out of reach of the mortgage lending rule of thumb of 4 times earnings. Moreover, since 1999 house prices in West Sussex have more than doubled, with an increase of 116.9 per cent (the equivalent national increase is 124 per cent). This change in house prices combined with moderate growth in earnings (13 per cent compared to 24 per cent nationally) over the same period has resulted in the ratio of house prices to earnings increasing dramatically to 11.03 to 1 in West Sussex (nationally it increased to 7.7 to 1). The proportion of dwellings sold is also very high in West Sussex with only Crawley dropping below the national average.

Table 17: Housing

LAD	Average house price January-March 2006	Proportion of total dwelling stock which is unfit, 2004	Proportion of owner occupied households, 2001	Proportion of rented households, 2001	Proportion of households sold April-March 2006	% change in average house price, Jan-March 1999-2006	% change in earnings house price ratio 1999-2006	Affordability score	Affordability score rank (out of 354)
Crawley	190,397	0.50	68.31	31.69	4.34	125.22	74.7	109.28	213
Worthing	186,401	3.90	77.03	22.97	5.56	151.24	116.8	98.25	254
Mid Sussex	240,906	0.90	80.24	19.76	5.12	109.98	121.9	97.07	273
Horsham	253,866	1.80	79.05	20.95	5.00	94.58	72.0	95.44	290
Adur	201,988	3.10	78.56	21.44	5.23	139.14	104.6	85.38	320
Arun	206,125	2.70	79.57	20.43	5.23	133.05	108.3	83.90	331
Chichester	275,214	2.10	70.59	29.41	4.45	105.40	81.9	68.07	366
West Sussex	224,760	2.06	76.47	23.53	5.00	116.95	80.8	90.39	41 (out of 50)
South East	228,762	3.39	73.96	26.04	4.93	120.11	77.0	87.51	8 (out of 10)
Great Britain	193,799	4.08	68.29	31.71	4.41	124.69	82.3	100.00	

Source: *localknowledge*, Local Futures

4.3 Commercial and Industrial Property

Table 18 considers land use within West Sussex, showing how the amount of industrial and commercial floorspace has changed over time.

- **West Sussex has seen a reduction in its stock of commercial and industrial floorspace over recent years, ranking 21st out of 50 sub-regions in England & Wales.**

Commercial property in West Sussex is geared towards office and retail space with a below average proportion of industrial space. In keeping with the economic scale section Crawley has the by far the largest business rateable value, twice that of the next largest district, indicating the largest total floorspace.

Between 1999-2005, the amount of industrial and commercial floorspace in West Sussex increased by 5.5 per cent, below the average for Britain and the South East. Breaking this change down further we can see that there has been a reduction overall in retail space, a rate of growth in office space around half the national average, but an above average increase in industrial space. With already above average proportions of retail and office space these growth figures may indicate that levels have reached their peak.

County wide figures mask wide variations in floorspace change at a district level, Crawley has seen very high growth overall, ranking 59th out of 354 nationally, whereas Arun has seen a reduction. Crawley and Adur are the only two districts where retail space has increased and Arun and Crawley have both seen exceptionally high levels of office space growth compared to Horsham's decline.

Table 18: Commercial and Industrial Property

LAD	Retail floorspace as a proportion of all commercial & industrial floorspace, 2005	Office floorspace as a proportion of all commercial & industrial floorspace, 2005	Industrial floorspace as a proportion of all commercial & industrial floorspace, 2005	% change in retail floorspace, 1999-2005	% change in office floorspace, 1999-2005	% change in industrial floorspace, 1999-2005	% change in commercial & industrial floorspace, 1999-2005	Proportion of total area that is derelict land and buildings, 2003	Business Rateable Value 2005	Floorspace change score	Floorspace change score rank (out of 354)
Crawley	14.30	29.81	55.89	3.94	24.65	10.59	13.36	0.00	174,545	274.74	59
Chichester	24.17	16.11	59.72	-1.56	0.00	17.63	9.37	0.03	66,663	192.64	102
Worthing	31.00	22.82	46.17	-1.26	6.13	9.38	5.13	0.17	57,665	105.50	174
Mid Sussex	22.99	26.28	50.73	-5.97	4.35	7.20	3.14	0.00	74,077	64.49	211
Horsham	18.20	20.90	60.90	-1.82	-7.92	7.97	2.42	0.10	71,668	49.68	230
Adur	19.32	9.09	71.59	2.41	5.26	1.29	1.85	0.17	27,354	38.07	237
Arun	25.25	8.62	66.13	-9.69	29.63	-2.19	-2.17	0.00	52,784	-44.58	319
West Sussex	21.34	20.92	57.74	-2.52	9.45	7.44	5.54	0.04	524,756	64.59	21 (out of 50)
South East	20.85	22.29	56.86	2.75	14.81	4.07	6.00	0.06	5,785,615	123.27	4 (out of 10)
Great Britain	17.46	16.57	62.55	0.04	17.74	3.26	8.58	0.06	38,096,390	100.00	

Source: *localknowledge*, Local Futures

4.4 Transport and Connectivity

The Local Futures Audit assesses an area's accessibility and connectivity using a composite of measures including distance from London, a 'Local Hub' Index (the concentration of transport hubs such as motorway junctions, airports, ports and mainline railway stations), and the 'Contiguity Index' (a score based on an area's proximity to transport hubs in neighbouring districts). Table 19 shows the results for West Sussex.

- **West Sussex scores poorly on our overall accessibility and connectivity index with a score of 62.3 on an index with Great Britain as 100.**

West Sussex scores poorly on our measure of accessibility and connectivity, with a score of 62.3 on an index where GB scores 100. However, this measure is heavily skewed so that cities and large towns do very well and rural areas do very poorly, with little in between. This means that even with a score around two thirds of the national average West Sussex still performs mid-table nationally (23rd out of 54 sub-regions). With a low connectivity score we often find a higher proportion of people travelling to work by car and this is the case for West Sussex. The variance in ranking is high again; Crawley, Worthing and Adur score very well on this indicator while Chichester and Horsham do not.

The county has a Net Commuting score higher than 100 indicating that the area is a net importer of labour; the key destinations on this measure in the county are Crawley, Worthing and Mid Sussex. On average 37 per cent of jobs in each district are taken by non-residents, this is just below the national average. However, in Adur and Crawley these figures leap dramatically and in Crawley 56 per cent of jobs are taken by non-residents. Crawley's figure places it in the top decile of all authorities nationally and relates back to our finding in the prosperity chapter where resident's incomes did not seem to reflect earnings available locally. This section suggests that commuting flows are having an impact.

Table 19: Transport: Accessibility and Mobility

LAD	Proportion of people who travel to work by car, 2001	Proportion of people who travel to work by public transport, 2001	Proportion of people who travel to work by foot or bicycle, 2001	Net Commuting, 2001, GB=100	Journeys per sq km, 2001	Proportion of jobs taken by non-residents, 2001	Proportion of residents who work elsewhere, 2001	Average travel to work time (in minutes), 2002-2003	Connectivity score, GB=100	Connectivity Score rank (out of 408)
Crawley	67.51	12.48	10.77	183.08	1828.78	56.23	30.00	21.00	410.95	16
Worthing	63.64	7.43	17.92	117.63	1353.66	34.03	35.39	19.00	254.77	36
Adur	65.20	11.33	12.32	75.01	503.95	44.05	56.37	16.00	189.38	59
Arun	66.82	5.71	14.68	77.15	207.65	17.64	37.46	21.00	37.79	187
Mid Sussex	64.14	12.36	11.18	107.04	161.77	35.07	45.83	26.00	32.74	198
Horsham	68.39	7.65	10.96	99.36	95.01	29.05	41.60	19.00	16.51	258
Chichester	63.37	5.42	15.92	127.33	64.75	35.63	31.74	20.00	10.37	295
West Sussex	65.72	8.82	13.23	112.84	174.85	37.38	38.85	20.29	62.33	23 (out of 54)
South East	64.84	10.21	12.98	105.49	193.90	38.22	41.02	21.88	91.84	2 (out of 11)
Great Britain	61.18	14.81	13.03	100.00	155.82	39.37	39.62	20.32	100.00	

Source: *localknowledge*, Local Futures

4.5 Local Services

A number of indicators are used to evaluate the quality or attractiveness of local services. We look at school exam results, recycling levels, and Comprehensive Performance Assessment (CPA) scores. A summary is presented in Table 20.

- **The standard of local services in West Sussex is excellent – the County ranks 6th of 48 sub-regions in England on our overall score.**

Local services are generally of a high standard in West Sussex. School performance is above average, with 55.13 per cent of pupils achieving at least five GCSE grades A*-C in 2004/05 (54.5 per cent nationally). The level of household recycling – 17.6 per cent of waste in 2003/04 – is well above average (10.6 per cent) and Crawley, Horsham and Adur all feature in the top performing decile of authorities nationally. There is also a mixture of CPA scores but Horsham and Chichester do best on this indicator

West Sussex also scores below average on access, in terms of geographical proximity to key services such as schools, GPs, Post Offices and supermarkets etc. Only Crawley, Adur and Worthing score above average on this indicator.

Table 20: Local Services

LAD	Percentage of pupils achieving 5+ GCSEs grades A*-C 2004/05	% household waste recycled, 2003/04	Access to services 2005	CPA 2004	Local services score	Local services score rank (out of 354)
Horsham	68.60	22.30	76.81	5.00	145.67	3
Chichester	54.80	18.11	75.37	5.00	132.64	12
Crawley	52.70	21.55	105.64	3.00	108.39	122
Mid Sussex	68.00	18.47	90.44	3.00	107.48	129
Arun	45.90	12.99	99.74	4.00	102.76	160
Adur	35.00	19.37	100.48	3.00	96.14	212
Worthing	49.70	11.17	111.09	3.00	85.75	276
West Sussex	55.13	17.55	93.43	3.79	112.54	6 (out of 48)
South East	57.00	16.35	94.22	3.87	114.19	1 (out of 9)
Great Britain	54.54	10.55	100.00	3.10	100.00	

Source: *localknowledge*, Local Futures

4.6 Local Amenities

In this Audit we consider local amenities through a combination of indicators, including the density of national heritage sites and listed buildings, the availability of cultural amenities (such as cinemas, theatres and libraries) and a café culture, and employment in hotels and restaurants. A summary is presented in Table 21.

- **West Sussex is ranked 40th out of 54 sub-regions in Great Britain in respect of the quality of its local amenities.**

In terms of local amenities, West Sussex performs relatively poorly with a score of 50.9 on an index with GB as 100. The range of cultural amenities is well below the national average, though this is not surprising for a largely rural area. The only indicator where West Sussex scores above the national average is in the number of national heritage sites per sq km (17.1), this is almost double the national average. The proportion of employment in hotels and restaurants is low when compared both nationally and regionally, indicating the lack of a significant tourism offer.

Table 21: Local Amenities

LAD	National Heritage sites per 1000 sq km, 2002	Cultural Amenities per 1000 sq km, 2002, GB=100	Proportion of employment in Hotels and Restaurants, 2004	Listed Buildings per 1000 sq km, 2004	Café culture, July 2004	Local amenities score	Local amenities rank (out of 408)
Worthing	31.25	290.41	4.38	13.72	1.00	132.99	39
Crawley	22.22	116.91	6.83	4.69	5.00	95.06	81
Arun	18.10	38.56	6.94	9.21	0.00	48.31	208
Adur	23.81	59.50	3.57	6.33	0.00	45.38	231
Chichester	16.54	11.19	5.05	8.76	2.00	38.80	298
Mid Sussex	20.96	14.54	3.87	6.51	1.00	33.91	334
Horsham	13.21	11.00	4.20	6.88	1.00	30.07	373
West Sussex	17.09	23.77	5.19	7.87	1.43	50.85	40 (out of 54)
South East	20.66	59.60	6.65	8.36	1.18	90.82	2 (out of 11)
Great Britain	9.96	100.00	7.16	14.22	1.69	100.00	

Source: *localknowledge*, Local Futures

4.7 Natural Environment

The final aspect to be considered under the Environment section of the Local Futures Audit is the quality of the natural environment in West Sussex. Clearly, the natural environment is a subjective topic which makes benchmarking problematic, yet the knowledge economy is associated with a more decentralised geography of employment and population change as knowledge workers try to find a good work-life balance. Table 22 shows the results of our audit of the natural environment in West Sussex.

- **West Sussex performs well on our natural environment score, ranked 10th of 48 sub-regions in England.**

The quality of the natural environment in West Sussex is very good, and the County ranks 10th of 48 sub-regions in England. Once more indicators on the quality of the local environment are heavily skewed across the country with towns, cities and urban areas scoring very badly and areas of outstanding natural beauty, such as the Lake District and Devon and Cornwall scoring well. On the first indicator, Natural Beauty, West Sussex scores 259.6 on an index with GB as 100; this figure is well above national and regional figures. Levels of tranquillity in West Sussex are also very high, while scores for weather and air quality are slightly below average.

Table 22: Natural Environment

LAD	Natural Beauty (access and contiguity), GB=100	Tranquillity, 2004 (GB = 100)	Average weather, 2002	Air quality 2001	Natural environment score	Natural environment score rank (out of 354)
Chichester	209.44	830.61	9.00	0.83	160.73	44
Mid Sussex	113.51	228.25	9.00	0.99	100.94	107
Horsham	95.61	397.76	9.00	0.89	97.91	111
Arun	99.81	135.22	10.00	0.87	89.90	130
Worthing	67.31	39.42	11.00	1.04	72.13	178
Adur	69.30	72.54	10.00	0.99	68.97	193
Crawley	64.66	53.22	10.00	1.30	68.34	195
West Sussex	259.66	226.89	9.71	0.89	114.57	10 (out of 48)
South East	193.24	83.18	10.19	0.98	114.18	2 (out of 9)
Great Britain	100.00	100.00	10.00	0.88	100.00	

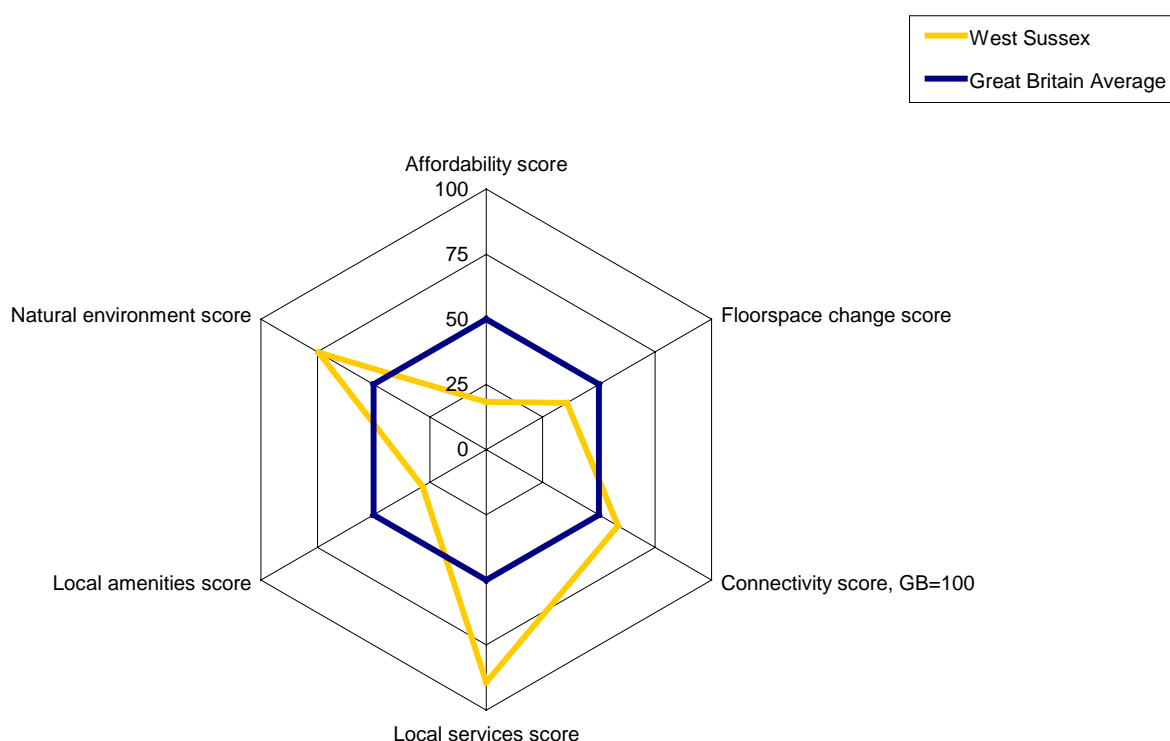
Source: *localknowledge*, Local Futures

4.8 Summary

A summary of West Sussex’s environmental profile is presented as a spider chart in Figure 4.

West Sussex has very low levels of housing affordability owing to high house prices combined with moderate earnings. The county has seen sluggish growth in commercial property and levels of connectivity are variable. Poor access to cultural amenities is offset to some extent by the presence of high quality public services. Where West Sussex performs best in this section is the high quality of its natural environment.

Figure 4: Environment Summary



Source: *localknowledge*, Local Futures⁴

⁴ The chart displays the national ranking of the County, converted to a percentile score (i.e. the top ranking sub-region scores 100% and the bottom ranking 0%)

5 Conclusions: The Final ‘Scorecard’ and Policy Discussion

5.1 Introduction

This Local Futures Audit of West Sussex has captured the ‘State of the County’ at a particular point in time – it is basically a set of snapshots of local economic, social and environmental conditions. It also provides a ‘woods from the trees’ perspective on the state of West Sussex by looking at how the County compares with the South East region as a whole, and also how it performs compared to the rest of Britain.

The results of the Audit, therefore, provide a basis for an informed discussion on the challenges and issues facing West Sussex – now and over the coming years. It can provide an evidence base and inform the development and review of strategies and policies, including the County Strategy and the Local Area Agreement.

This final chapter of the report provides a synthesis of the Audit findings in the form of a final ‘scorecard’, which shows how the County stands within Britain (compared to 54 sub-regions) and in relation to the South East. These different levels of assessment and benchmarking should be helpful in the council’s discussions with Government and other public sector funding bodies.

5.2 The Final ‘Scorecard’

The final ‘scorecard’ – shown in Table 22 – assesses the state of West Sussex in terms of the three main dimensions of sustainable development. The scores represent the quintile where the County falls on each of the measures (‘A’ representing the strongest performance, ranging to ‘E’ representing the weakest).

- **Economic Development** – West Sussex’s economic performance is mixed and the county has a small economy scoring a ‘D’ on economic scale. The county’s growth in jobs has been sluggish but levels of enterprise and the skills of the local resident workforce are all very good. But where the county excels is the presence of knowledge based industries and its labour market position.
- **Social Profile** – Social conditions in the county are very good indeed, the high presence of knowledge workers and a healthy sized knowledge economy have led to high levels of prosperity. Deprivation, inequality and crime are all low and health is good.
- **Environment & Quality of Life** – The nature of the environmental indicators chosen in this section give rise to a mixture of results as rural areas do well on their natural environment but poorly on amenities and the opposite is true for urban areas. Housing

affordability is very low in Sussex and, in line with low growth in jobs, growth in floorspace is low. Connectivity and Amenities average out at 'C's for the county, but vary considerably for the individual districts.

Table 22: The Sustainable Development 'Scorecard' for West Sussex

Economy	Regional	National
Economic Scale	E	D
Productivity	D	C
Economic Change	E	D
Industrial Structure	C	A
Business & Enterprise	E	B
Skills & Qualifications	C	B
Labour Market	C	A
Society		
Knowledge Workers	D	B
Prosperity	C	A
Deprivation	C	A
Inequality	B	A
Health	A	A
Crime	A	A
Environment		
Housing Affordability	C	E
Floorspace Change	D	D
Connectivity	D	C
Services	A	A
Amenities	E	C
Natural Environment	B	A

5.3 Policy Implications

The knowledge economy sits at the heart of the Government's economic development and competitiveness policy agenda. Through the former ODPM's sustainable communities programme the knowledge economy is also filtering into social and environmental policy, and acts as the driving force behind a number of local authorities' Community Strategies. For West Sussex County Council there are a number of key policy themes that need to be considered:

- *Entrepreneurship, business clusters and networks* – strengthening the supporting economic institutional framework (economic partnerships, and service agencies such as the Small Business Service/ Business Link, and Jobcentre Plus);

- *Local innovation* – improving product and process innovation across the business economy, based on collaboration between firms, the public sector, universities, colleges and other key players;
- *An educated, skilled and flexible workforce* – built around the LSC strategic area reviews and workforce development strategies, including improvements in IT skills and reducing education deprivation;
- *Infrastructure* – although not covered by the Audit, West Sussex's knowledge economy will require an advanced electronic infrastructure and a variety of e-services for a more technology-based economy and society.

Importantly, these four 'pillars' of West Sussex's knowledge economy need to be synchronised – that is, policies need to be joined up across all four areas of economic development strategy. In addition, any inter-area disparities within the County also need to be considered so that problem areas do not become economically, socially and environmentally ghettoised. Any future economic benefits need to be distributed fairly.

The future knowledge economy of West Sussex also needs to be **socially inclusive**. Recent years have seen increasing recognition of the link between poor economic performance and wider social problems; indeed the main objectives of the Neighbourhood Renewal Strategy are to maximise local wealth creation whilst ensuring that any benefits are distributed fairly.

The final strategic imperative is to ensure that economic and social development in West Sussex is **sustainable**. The environment and quality of life in West Sussex are generally good, and these assets will be key in attracting and retaining the workers that the County needs in order to develop its knowledge economy.