West Sussex Rural Strategy:
Rural Profile 2006

ECOTEC

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Contents PAGE

1.0 Introduction

ECOTEC Research and Consulting Limited were contracted by West Sussex County Council in September 2006 to produce a Rural Strategy for the period 2007 – 2017. The project was defined as follows:

- Draw together an assessment and overview of West Sussex rural areas, using existing data analysis, setting out their economic, social and environmental position. This has been done using the Defra definition of rural areas including comments on how this relates to the current situation within West Sussex, and any recommendations to refine the definition.

- Consider information available on the services delivered in rural areas by West Sussex stakeholders and the strategic direction of those services and evaluating the gaps in those services and areas for improvement.

- Produce a concise strategy and action plan ready for consultation with stakeholders. The consultation process to be undertaken by the County Council and the West Sussex Rural Partnership.

This document provides the baseline for Rural Strategy.

2.0 West Sussex Rural Profile

This Profile sets out an overview of economic, social and environmental trends in rural West Sussex. It aims to identify the socio-economic and environmental challenges faced in the rural areas in West Sussex, and to help establish the key priorities for intervention by the County Council. The analysis below has been organised around the three themes of the Rural Strategy published by Defra in 2004 (Economic and Social Regeneration, Social Justice for All, and Enhancing the Value of our Countryside), and begins with an overview of economic and demographic trends in the county.

2.1 Overview of the County

In 2001, the population of rural wards in West Sussex was 179,900, 24% of the county total. The population tended to be older than average, with 28% of residents aged between 45 and 64 (compared to 24% regionally and nationally) and a fifth above the age of 65 (16% regionally and nationally). Those aged between 16 and 34 made up a smaller proportion of the overall population than across the county, regionally, or nationally.

Table 1: Age Distribution (%), Rural West Sussex, West Sussex, South East and England and Wales, 2001

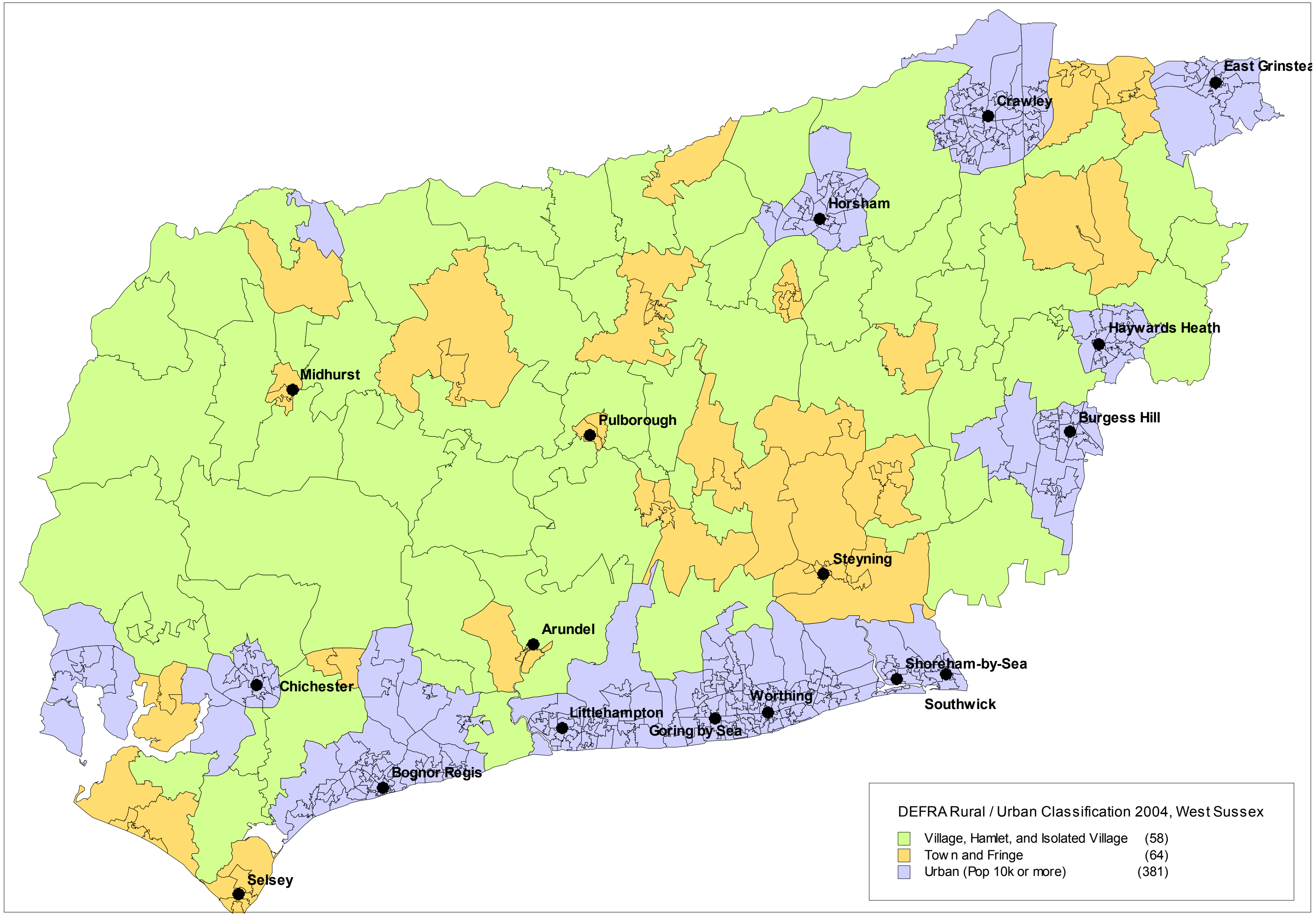
Age Group	Rural West Sussex	West Sussex	South East	England and Wales
0 to 15	20	19	20	20
16 to 24	8	9	11	11
25 to 34	10	12	14	14
35 to 44	15	15	15	15
45 to 64	28	25	24	24
65 plus	20	20	16	16

Source: Census of Population, 2001

The population of rural West Sussex has grown substantially in the last twenty years, although the age distribution of residents has changed. The population of the three rural districts (Horsham, Chichester and Mid Sussex) grew by 15% from 317,000 in

1981 to 365,000 in 2005, more rapidly than the county (14% growth), the region (12%) and Great Britain (6%).

Figure 1: West Sussex Rural / Urban classification 2004

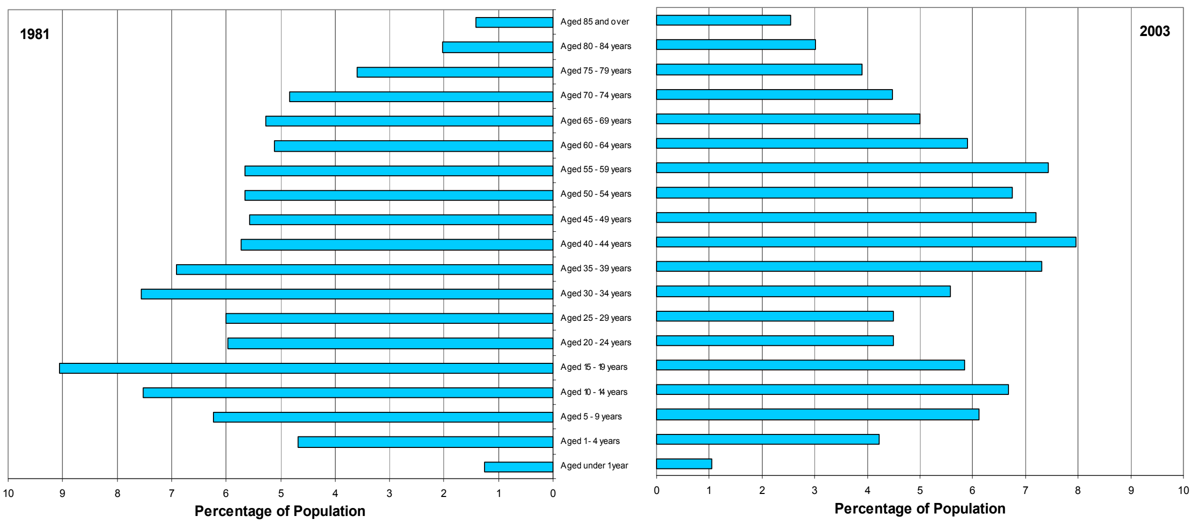


Population growth has come primarily from people living longer and in-migration and this has occurred disproportionately in rural West Sussex (see Figure 2 below). Some groups have grown particularly rapidly for example, the numbers of those over retirement age (65 and above) rose by 27 % from 54,300 to 69,000 over the period compared to 14 % nationally; the group accounted for 19 % of total population in 2005.

Rural districts in West Sussex also saw substantial growth in the numbers aged 45 to 64 from 1981 to 2005 (43 % over the period compared to 18 % nationally) together with a 6 % growth in the numbers aged 0 to 14 (7 % decline nationally), implying that a number of families have been attracted to rural areas in West Sussex. However, the number of younger adults residing in rural West Sussex has fallen , with the numbers aged 15 to 24 falling by 21 % and the numbers aged 25 to 34 falling by 14 %.

A growing population of families and those above retirement age will have led to increasing demand for health and education services. These trends may also have put additional pressure on the housing market with higher demand for both smaller and larger dwellings. Population growth has been driven by those age groups tending to command higher disposable incomes, and this may have also led to increased labour demand to satisfy higher levels of consumption, particularly in the service sectors.

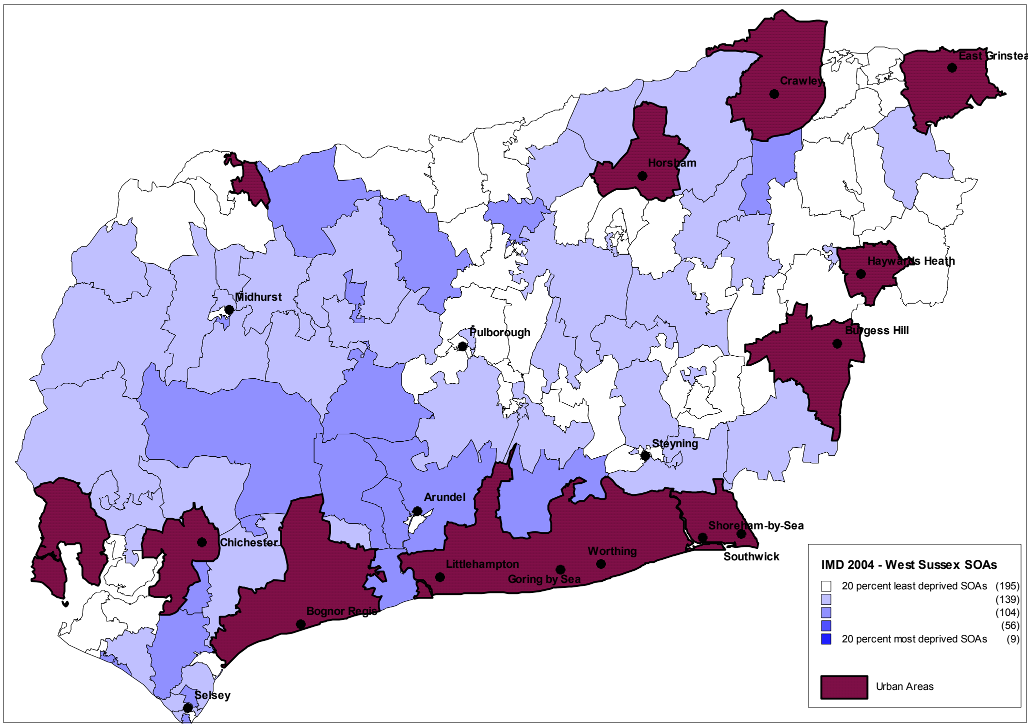
Figure 2: Age Distribution - Rural West Sussex Districts, (Chichester, Mid Sussex and Horsham) 1981 and 2005



Source: Census of Population, Mid-Year Population Estimates, Office for National Statistics

Information on the economic contribution of rural areas is difficult to come by[1], but estimates from Experian / Business Strategies suggest that the rural districts of the county (Chichester, Horsham and Mid Sussex) play a small but critical role within the sub-regions economy by contributing 47.5 % of the County's GVA (Gross Value Added) in 2005. However, this also includes the output generated within the service centres which would not be included within a ward based definition; rural wards supported 56,900 jobs in 2004 – 17 % of the county total of 331,400, indicating the economic contribution of rural areas may be smaller. In general terms, the productivity of West Sussex is just below average and as an area for economic growth the West Sussex economy is ranked 40^{th} out of 54 sub-regions[3].Rural areas in West Sussex do not generally suffer problems caused by severe concentrations of deprivation (see Figure 3). Moderate concentrations of deprivation (Super Output Areas (SOAs) in the 40 – 60 % most deprived nationally) can be found in areas with more dispersed populations, mainly in the hinterlands of the coastal urban areas towards the south of the county.

Figure 3: Index of Multiple Deprivation 2004, Rural West Sussex[2]



Source: ODPM, Defra

[1] ONS do not compute estimates of output below NUTSIII level meaning the lowest geographical area for GVA statistics is West Sussex County as a whole.
[2] DEFRA Rural Definition – Lower Level Super Output Areas
[3] The State of the County – An Economic, Social and Environmental Audit of West Sussex, the local futures group, 2006

2.2 Economic and Social Regeneration

2.2.1 Employment

In 2001, 83,000 residents of rural wards in West Sussex were in employment. The area sustained an employment rate of 65 %, in line with the county and regional averages and higher than the England and Wales average of 61 %. At the same time, rural areas of the county supported 56,900 jobs, indicating that a large proportion of residents are required to leave rural areas to access employment.

Employment in rural areas of West Sussex is skewed towards service activities, with distribution, retail and wholesale accounting for 30 % of all employment (25 % nationally), and other services accounting for a further 7 % (4 % nationally). This may reflect a relatively buoyant tourism industry. At the same time, banking, finance and insurance (18 % compared to 20 % nationally), and public sector activities account for disproportionately low levels of employment (22 % compared to 26 % nationally). This may reflect the tendency for these services to be concentrated in larger service centres where a larger population can be served.

Table 2: Employment by Sector (% of total), Rural West Sussex 2004 (excluding self employed)

Sector	Great Britain	South East	West Sussex	West Sussex Rural Wards
Agriculture and fishing	1	1	1	2
Energy and water	1	1	1	0
Manufacturing	12	9	10	12
Construction	5	4	3	6
Distribution, hotels and restaurants	25	26	28	30
Transport and communications	6	6	10	4
Banking, finance and insurance, etc	20	23	20	18

Sector	Great Britain	South East	West Sussex	West Sussex Rural Wards
Public administration, education & health	26	24	25	22
Other services	5	5	4	7

Source: Annual Business Inquiry, Office for National Statistics

West Sussex is also playing a key role in respect of the proportion of knowledge workers in the workforce, ranking 13th out of 54 sub-regions in Great Britain[1]. The increase and growth in employment within the knowledge-based sector is a critical factor in the development of 'up-skilling' rural areas, through provision of 'higher end' occupations such as managerial, professional and technical jobs.

2.2.2 Economic Activity and Inactivity

Despite a higher than average proportion of those above retirement age, economic activity rates among those aged 16 to 74 were 69 % in 2001. This is equal to the county average (69 %), slightly lower than the regional average (70 %) and is higher than the national average (66 %).

Economic activity rates among the 55 to 64 age group were high in rural areas of West Sussex at 61 % (53 % nationally, and 60 % across the county and the region). Economic activity rates among this age group are also likely to have risen since 2001 with shortfalls in pension funds. Returnees to the labour market may face difficulties in obtaining employment; 46 % of the 9,100 economically inactive among this age group had last been in work prior to 1996.

Although this group may have experienced the widespread use of computing in their previous jobs, substantial developments in software and hardware since 1996 may mean that training will be required in order to bring the skills of this group in line with the demands of current technologies. Employers may be reluctant to provide training if it is costly to do so, with this group of workers offering a potentially short time horizon in which they will be willing to offer labour. In addition, the poor accessibility to parts of rural West Sussex may mean that publicly funded skills and training programmes are difficult to access.

2.2.3 Migrant Workers

Migrant workers are those who choose to move to the United Kingdom (UK) to live and work on a permanent or long-term basis. They tend to be predominately from European Union (EU) countries, and particular attention has been paid to the enlargement of the EU and the impacts arising from the arrival of foreign workers. Nationals from the Accession eight countries (Poland, Lithuania, Latvia, Slovakia, Estonia, Czech Republic, Hungary, Slovenia), who wish to work for more than one month for an employer in the UK, must register under the Worker Registration Scheme (WRS). There is also an increase in the numbers of seasonal workers and people seeking asylum/refugee status who are seeking employment in this country.

Migrant workers are making a serious contribution to the economy in the UK. The arrival of workers from outside the UK can provide significant benefits to the country, especially in rural areas. They fill gaps in employment which the UK workforce could not fill, support rural schools, businesses and public transport routes to remain viable, and bring new cultural diversity and different perspectives.

Across the UK, 579,000 applicants (roughly 120,000 migrant workers are registered in rural areas) are registered on the Worker Registration Scheme (WRS) from 1st May 2004 to 31st December 2006. In West Sussex an average of 2,195 people per month are registering on the WRS, and the majority (85%) tend to be aged below 34.

Table 2.3 Figure Total Number of Migrants Registering on the WRS in West Sussex, South East and the Percentage Aged 34 and under

	Total Registering on the WRS in the South East	Monthly Average for West Sussex	Percentage of those WRS aged 34 and below
May 04 – Dec 05	40,860	2,043	85.0%
Jan 06 – Mar 06	6,003	2,001	83.3%
Apr 06 – Jun 06	5,800	1,993	85.0%
Jul 06 – Sep 06	7,946	2,649	88.1%
Oct 06 – Dec 06	7,040	2,347	84.0%

Source: Home Office

The largest occupational group for migrant workers (particularly for accession eight nationals on the WRS) in West Sussex are employed within the administration, business and management services industries (40%). A further 20% of all accession eight nationals joining WRS in the County are employed within hospitality and agriculture sectors.

[1] The State of the County – an economic, social and environmental audit of West Sussex, the local futures group, 2006

2.2.4 Benefits

Benefit claimants make up a small proportion of the rural West Sussex working age population of 110,000 but numbers have been rising. Between February 2000 and February 2006, the total number of claimants rose by 8% from 6,790 to 7,550 – more rapidly than the 6 % increase seen across the county, the 2% rise across the South East and the 6 % fall seen across Great Britain.

Job Seekers Allowance (JSA) claimants make up a small proportion of the population (less than 1 % in August 2001[1], in line with county and regional rates and less than half of the 2.4% across England and Wales) and numbers have stayed relatively stable, indicating rural areas of the county do not have substantial concentrations of joblessness.

However, the numbers of Incapacity Benefit (IB) and Invalid Carers Allowance (ICA) claimants have risen by 10% and 46% respectively over the period, and disabled claimants by 38% between February 2002 and February 2006. Claimants on illness and disability related benefits accounted for 64% of total working age claimants in February 2006, up from 53% in February 2000. Growing numbers of people with health conditions are likely to put an increasing strain on the delivery of health services in rural West Sussex.

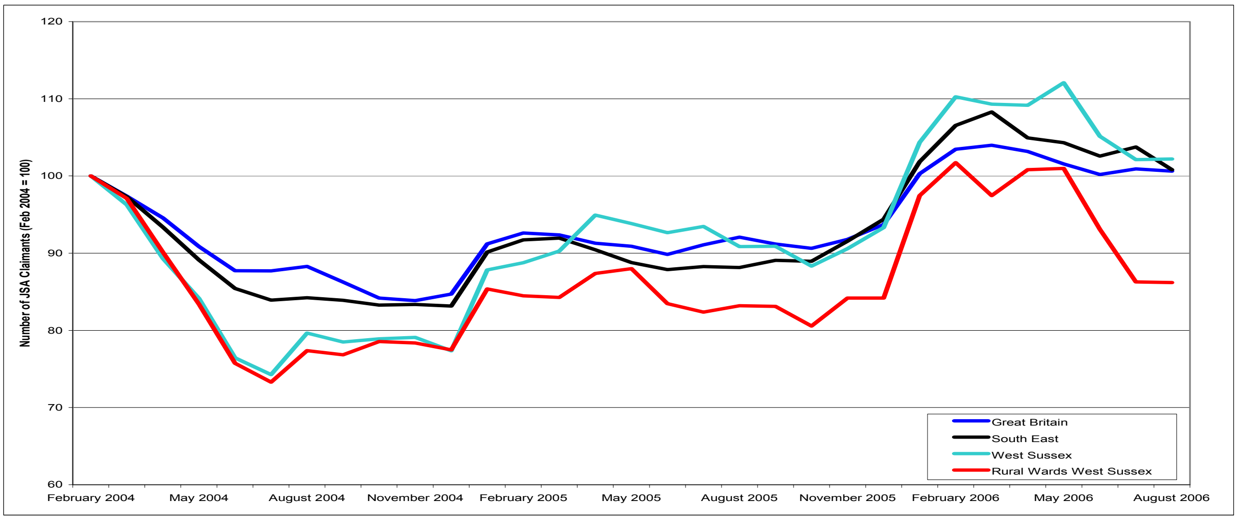
2.2.5 Unemployment

Rural West Sussex does not have a severe problem with joblessness. From 2000 to 2006 the number of JSA claimants has held steady between 950 and 1,050. The labour market in West Sussex also operates comparatively efficiently and the bulk of those looking for work connect with employment reasonably rapidly. Between February 2004 and August 2006, a monthly average of 11.2% of JSA claimants would find work, higher than the county (11.1%), regional (10.5%) and national (8.4%) averages. The 2001 Census of Population also showed unemployment rates low at 2.4% in rural West Sussex, compared with 2.7% across the county, 3.3% regionally and 5.0% nationally.

Figure 4: Number of Job Seekers Allowance Claimants

[1] Calculated using the number of working age JSA claimants as of August 2001 and the 2001 Census of Population working age population

[2] Home Office statistics



Source: Department of Work and Pensions

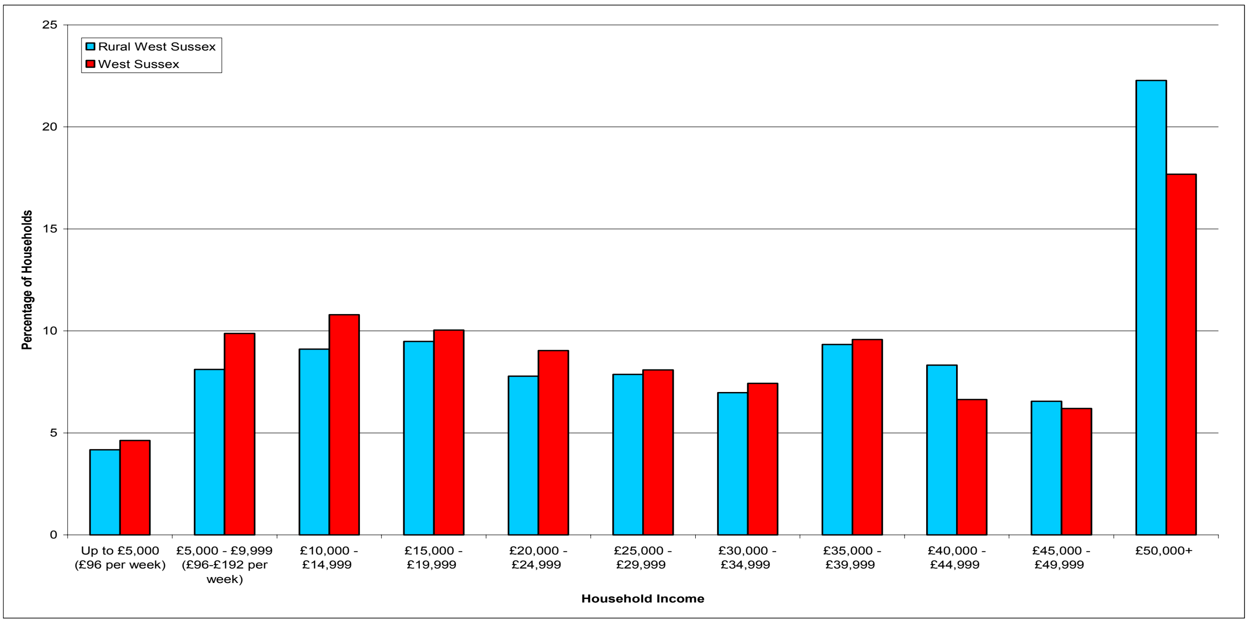
However, there is a core group of claimants who find employment more difficult to obtain. Among jobseekers, concentrations of the long term (one year or more) and very long term (two years or more) unemployed are high. The proportion of claimants claiming JSA for more than one year was 41% in the rural wards of West Sussex (compared with 15/16% across the county, region and country) in August 2006, and 15% for more than two years (45% across West Sussex, South East and Great Britain).The number of long term unemployed has also risen rapidly, rising by 52% between February 2004 and August 2006. While the number of very long term unemployed has risen by 115%.

Employment demand is reasonably high in the county so these unusually high concentrations of long-term unemployment are largely caused by other constraints such as a lack of the right skills and access to work. Low skill occupations in service industries such as retail become increasingly centralised in larger service centres. Issues concerning transport accessibility in rural areas are likely to cause problems for deprived groups in accessing employment. In addition, agriculture has become less profitable due to both global competition and the decoupling of subsidies from production. The skills set of former agricultural labourers are unlikely to be suited to the needs of the growing service sector. A skills mismatch may also help cause concentrations of severe long-term unemployment.

2.2.6 Household Income and Wages

Household income is high in rural wards of West Sussex. In 2004, average annual household income in West Sussex rural wards was £40,300. This compared favourably with the average household income for West Sussex as a whole (£34,800), the South East (£36,100 and Great Britain (£29,900). The income distribution is also skewed towards higher earners: 22% of households had a combined annual income of £50,000 or more in 2004 in rural areas, compared to 18% across the county (12% nationally), although there remained a core of 12% with incomes less than £10,000 per year (see Figure 5). In terms of prosperity, West Sussex is ranked 11th out of the 54 sub-regions across the UK[1].

Figure 5: Income Distribution, Rural West Sussex



Source: Office for National Statistics, Census 2001

High average incomes are likely to give the residents of rural wards considerable purchasing power and consumption demand is likely to help rural communities sustain low-skill jobs in service sectors. However, with the number of jobseekers low, increasing demand for retail services, driven by a growing affluent population, may put upward pressure on wages and on the price of locally sourced consumption goods. This may cause problems for those at the lower end of income distribution. High incomes will also help sustain high house prices with similar implications.

There is little evidence, to date, of the labour market overheating in rural areas in West Sussex although unemployment rates are low. In 2005, average weekly earnings were in line with the national average of £432, in Horsham (£449) and Mid-Sussex (£427) and compared favourably with the regional (£450) and county (£419) averages. Weekly pay was low in Chichester at £372. However, growth in average earnings between 1998 and 2005 was slow at 18 % (although in line with the county average) in relation to the 28 % growth seen across Great Britain and the South East.

[1] The State of the County – an economic, social, and environmental audit of West Sussex, the local futures group, 2006

Pressure on the labour market will be reduced by the lower competition for workers in rural areas with many commuting into service centres for employment, although a growing population will have helped. The impact of overheating is more likely to be felt by urban employers than those in rural communities, but any upward pressure on wages in urban labour markets will help push up the price of consumption goods in rural areas. Those dependent on incomes from rural employment may find their quality of life decline.

2.2.7 Broadband Availability

The availability of slow internet access via dial up is virtually ubiquitous across England as the connection is made over the land-line telephone network. Access to more efficient broadband services comes through two main means; Digital Subscriber Line (DSL) over a telephone line to a DSL enabled exchange, or by cable. OFCOM operator data shows that the percentage of premises connected to a DSL enabled exchange was 99.9 % across the UK in January 2006, and a similar proportion across West Sussex, although some more remote rural areas did not have a DSL enabled exchange.

High speed internet access brings obvious productivity advantages to businesses with quicker access to email, on-line procurement, and sales. Given the remoteness of some rural communities, access to broadband services may improve access and availability to information and provide further social benefits.

2.2.8 Training and Skills

Residents of rural West Sussex tend to be qualified to higher levels than those across the county, the region or the country. In 2001, 23% of residents aged 16 and above possessed level 4 or 5 qualifications (equivalent to first degree level and above) compared to 19% across the county as a whole, 22% across the South East and 20% across England and Wales. The high concentration of graduates in rural areas is likely to help contribute to the high household income levels seen across the county, and will help maintain prosperous rural areas.

A further 24% were qualified to Level 2 (5 A*-C grades at GCSE) with a lower than average proportion (37%, compared to 46% nationally) qualified to Level 1 or with no qualifications. Local firms are likely to benefit from a qualified workforce, with those entering lower level employment more likely to have achieved target grades at GCSE, and may therefore lead to higher productivity levels. However set against this would be the desire of those individuals to move on to better paid work more quickly.

2.2.9 Business Activity

In 2004, there were 10,200 workplaces in rural wards of West Sussex, 30% of the county total of 33,700. Average firm size was smaller in rural areas than across the county, with 90% of firms employing between 1 and 10 employees (compared to 84% across West Sussex, 85% regionally, and 83% nationally). The strong prevalence of small firms may hold back productivity in rural areas; smaller firms find it harder to obtain credit to make capital investments and releasing staff for training has a higher impact.

The sectoral structure of workplaces is different to that of employment. While distribution, hotels and restaurants claim a higher share of employment than average, only 23% of workplaces were in this sector in 2004 in rural areas, compared to 26% across the county and regionally, and 29% across the country. This is indicative of more centralised concentrations of these services (such as out of town shopping centres) where a larger catchment area can be served more efficiently than with individual outlets. At the same time, banking, financial and insurance service firms account for 36% of firms in rural wards, indicating these firms are generally smaller than average in the main.

2.3 Social Justice for All

2.3.1 Housing Market

The housing market in rural West Sussex is buoyant. In 2004, the average price of transactions across all dwelling categories was substantially higher than the county average. Dwellings traded at an average of £297,000 in rural areas of the county, compared to £220,000 across West Sussex, £224,000 across the South East, and £178,900 across England and Wales.

The most significant components of housing turnover in rural areas in 2004 were detached and semi-detached houses, together accounting for 69% of the 3,988 housing transactions during 2004. Detached houses traded for an average price of £405,000, 18% higher than the county average of £344,000 in 2004. Semi detached houses trading at prices 12% higher than the county average of £212,600 for an average price of £238,000. Terraced houses and flats in rural areas also traded at prices 12 and 15% higher than the county average respectively.

Housing affordability has become a national issue as prices rise and is particularly relevant for rural West Sussex, despite high incomes. In 2004, houses traded at 7.4 times average household incomes, in comparison to 6.3 across the county, 6.2 regionally, and 6.0 nationally. With the housing market skewed towards expensive detached and semi-detached houses, supply of smaller and cheaper dwellings is low and will make it difficult for those on low incomes to purchase houses.

Housing supply has been relatively strong in the rural districts of West Sussex, with completions in Mid-Sussex, Chichester and Horsham staying relatively stable between 1,300 and 1,400 between 2002/03 and 2004/05. Completions have accounted for a rising proportion of the county total over this period rising from 59% to 72%, during which house building activity has declined in the county. However, declining house building activity across the county is likely to continue to put significant pressure on house prices in rural areas and affordability will continue to be a growing problem for residents on low incomes.

2.3.2 Service availability

Residents of rural West Sussex generally have to travel further to access services than in rural areas across the country (see Table 3). On average, residents have to travel 3.3km (15% higher than the national rural average) to GP surgeries, 1.5km (7% higher) to primary schools, and 1.7km (14% higher) to Post Offices. This imposes higher transport and travel costs on rural residents, and may make access difficult for some residents.

Food retail services in supermarkets, however, are in general more accessible in rural West Sussex with an average distance of 3.1km in comparison to the national rural average of 4.0 km. With retail providing a large number of jobs for residents, proximity provides a number of advantages for employers and employees alike. Employers will be able to recruit from a wider pool of workers, and employees will benefit from shorter commuting journeys.

Table 4: Average Distance to Services (Kilometres), Rural West Sussex, 2004

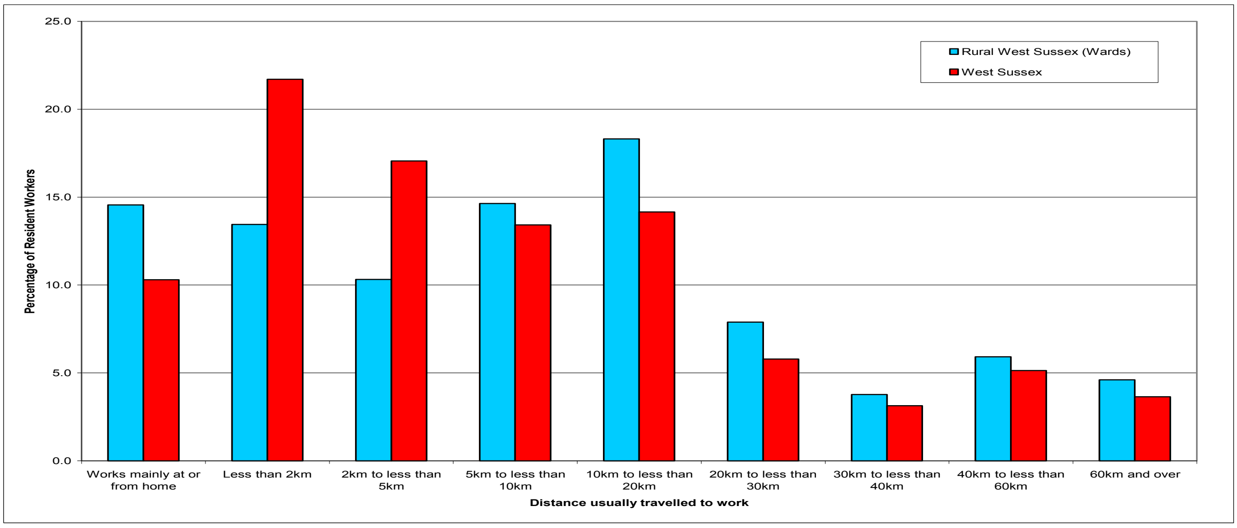
	GP Surgery	Primary School	Post Office	Supermarket
Rural West Sussex	3.38	1.53	1.67	3.06
West Sussex	2.11	1.12	1.19	1.71
All Rural	2.93	1.43	1.46	3.94
England	1.49	0.90	0.94	1.59

Source: Index of Multiple Deprivation 2004, ODPM

2.3.3 Public Transport

Workers in rural West Sussex generally travel further to work than those across the county (see Figure 6). Commuting patterns in rural West Sussex vary by district[1]. In 2001, residents of Chichester were the least likely to commute outside of the area with 69% (32,800 workers) of those in employment working and living in the district. Seven percent of residents also used the strong coastal links to access employment in Hampshire, with a further 6% travelling north to Surrey. Residents of Horsham and Mid-Sussex were more likely to travel with 41% and 44% respectively leaving their districts. Significant commuting destinations included Crawley, Surrey and London (to the main centres of employment).

Figure 6: Distance Usually Travelled to Work, Rural West Sussex, 2001



Source: 2001 Census of Population, Office for National Statistics

Residents of rural West Sussex are slightly more dependent on cars as their main means of travel than average, with 63% normally using a car compared to 60% across the county as a whole. Only a small proportion use public transport, with 5% using trains to travel to work (6% across West Sussex) and 2 % using a bus (3% across West Sussex). Car ownership was high in rural West Sussex in 2001, with 89 % of households owning at least one car (81% across the County), and 50% owning at least 2. The majority of residents of rural West Sussex will not be constrained by transport accessibility in accessing employment opportunities, but the remaining 11% without cars may suffer as a result.

Although major towns and the coastal area have a well connected rail network, rural areas in West Sussex are not well served and are dominated by north to south

[1] Origin-Destination Statistics, Local Authority Workplace Dataset, Office for National Statistics

connections (see Figure 7). There are north-south connections from Crawley to Littlehampton through rural areas in central West Sussex including stations at Horsham, Pulborough, Billinghurst and Amberley. There are also north-south lines towards the east of the county from Three Bridges through Haywards Heath and Burgess Hill to Brighton, and west to Havant, Portsmouth and Southampton.

The major hourly bus routes are also dominated by north to south routes, with one east to west route running from Midhurst through Burgess Hill. This leaves the more sparsely populated areas to the north, the west and the centre of the county relatively poorly connected by direct routes between service centres. The County Council does run flexible bus services in the zones highlighted in yellow in Figure 7, which operate 'on demand'.

Figure 7: Public Transport Network, West Sussex (Major Bus Routes in Blue, Rail Lines in Grey, and Flexible Bus Zones in Yellow)

Source: West Sussex County Council

2.3.4 Educational Infrastructure

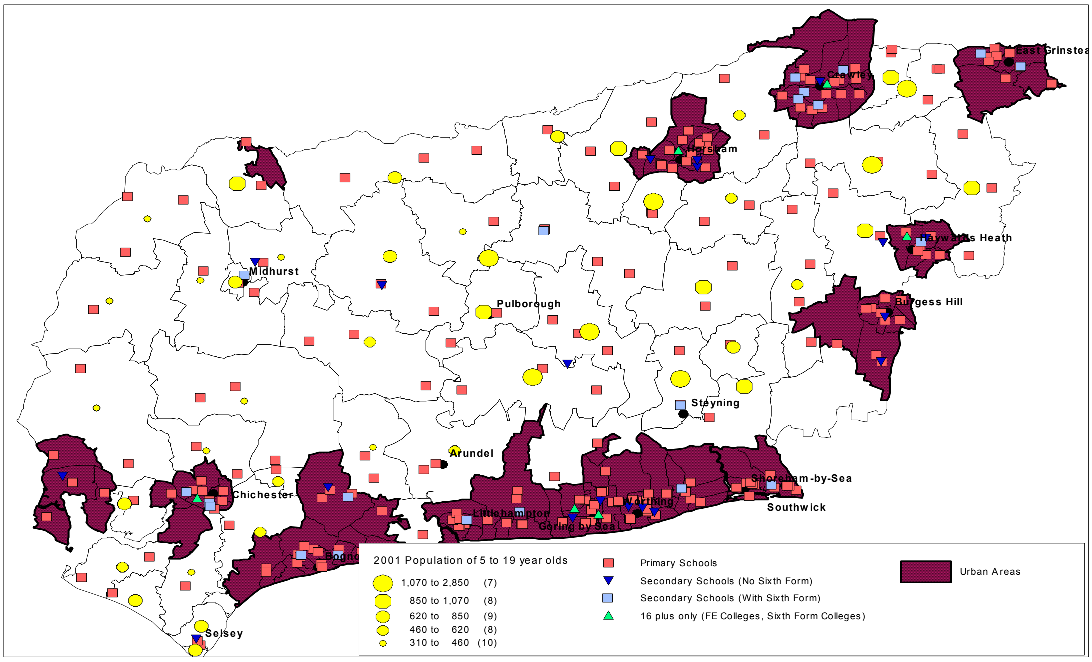
Rural West Sussex is well served by a primary school infrastructure. In 2005, West Sussex LEA operated 227 primary schools, of which 85 were located in rural SOAs providing a total of 12,400 places for 5 to 11 year olds. Rural schools are more likely to be small schools and benefit from more generous funding than such schools in similar council areas.

There has been a fall in pupil numbers across West Sussex but this is particularly acute in some rural areas. Between January 2001 and January 2007 the number of pupils attending the 17 first schools serving the Rother Valley area, for instance, fell by 13% (1681 pupils to 1485), leaving a quarter of school places empty. The County Council 's Policy for the Organisation of Primary Schools states that there should be a review of any school, dropping below ten pupils per year group, as it is important to consider the educational and social challenges to pupils' learning as well as the cost-effectiveness of the institution. There is no automatic assumption that a school should close, as there is a need to balance a range of factors, including transport issues as well as the impact on the local community. The County Council is keen to develop innovative ways of retaining strong rural schooling and build on the experience of federations and collaborations of schools already in place in rural areas.

The County Council is working with rural schools to develop access to extended schools provision in spite of the challenges of transport for access to activities before and after school and with a range of private, voluntary and independent providers as well as maintained settings in schools to secure access to sustainable early years education and childcare. The current wave of children's and family centres will impact on rural areas with the highest levels of deprivation from September 2008.

The County Council has a strong strategic partnership with the Learning and Skills Council to promote take-up of opportunities for and participation in learning for 14-19.year olds. Access to post 16 learning or to vocational courses for 14 - 16 year olds are identified as key priorities.

Figure 8: West Sussex Education Infrastructure, 2005



Source: Department for Education and Skills, 2001 Census of Population

2.4 Enhancing the Value of Our Countryside

2.4.1 Greenspace and Recreation

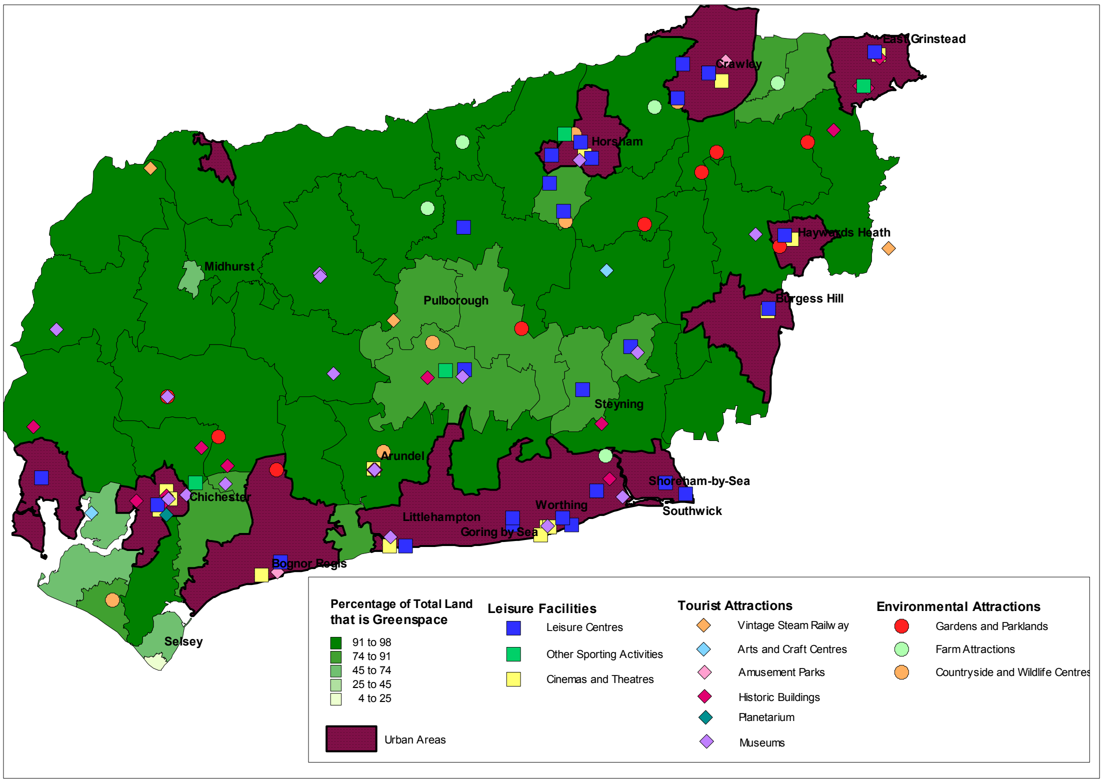
Rural areas in West Sussex benefit from large areas of greenspace (see Figure 9 below). 92% of the area of rural West Sussex was greenspace in 2004, compared with 86% across the county as a whole (88% nationally). Rural areas are relatively unspoilt with roads, rail and surfaced paths covering 1.4% of total land (compared to 2.5% across the county) and buildings taking up a further 0.8% (8% across the county).

Rural West Sussex is home to many tourist attractions, including farm attractions, museums, historic buildings, gardens and parklands, wildlife centres and arts and craft centres. These attractions help benefit rural areas by attracting spend from visitors and adding incentives for those visitors staying in more urban areas to make trips to the countryside. The more popular attractions in rural areas of West Sussex are the gardens at Wakehurst Place and Nymans Garden, both attractions in Mid Sussex charging an entrance fee, and attracting 422,000 and 153,000 visitors respectively per year, and Arundel Castle attracting a further 124,000.

Information on domestic and international tourism visits and spending is limited at a sub-county level, although estimates produced by West Sussex County Council suggest that the visitor economy is expanding, with visitor expenditure in the county rising from £870m to £957m from 2002 to 2004. A share of this revenue is likely to go to enterprises in rural areas and support lower skilled jobs, and in 2004, the tourism sector supported 14% of all employment in rural wards, equivalent to 8,000 jobs. This compares to 8% across West Sussex, the South East, and Great Britain. Tourism employment is beneficial for those with lower level or no qualifications but also offers low earning potential and job security for workers, meaning those dependent on the sector may be at risk of dropping into unemployment or be unable to afford the costs of transport to more productive forms of employment.

While there are a large number of tourism attractions, leisure services for residents are less well provided in rural areas, particularly towards the west of the county. There are few council funded leisure centres in rural areas, with the bulk situated in the main population centres. There are even fewer cinemas and theatres in rural areas. The travel involved in reaching these leisure services will impose additional costs on residents of rural areas and may exclude some from doing so. This will be a particular issue for young people with little in the way of disposable income, who may seek alternative diversions and possibly anti-social pastimes, reducing the 'liveability' of rural communities.

Figure 9: Greenspace, Leisure and Tourism Facilities, West Sussex



Source: Generalised Land Use Database, ODPM, 2004, West Sussex County Council

2.4.2 Water Quality

The rivers running through the rural districts of West Sussex are generally of high chemical and biological quality. In 2005, 85% and 88% of the monitored river lengths of Chichester and Horsham were of good biological quality[1], and 75% in Mid Sussex. Chemical quality was lower, with 43%, 13%, and 27% of the monitored river length rated good or fair in Chichester, Horsham and Mid Sussex respectively. Rivers in West Sussex compare favourable to the quality of rivers across the nation on biological measures, but unfavourably on chemical measures. In 2005, 71% of England's river lengths were rated good biological quality, and 64% of good chemical quality. The chemical monitoring of West Sussex's rivers revealed high presences of phosphates in particular, often the result of fertiliser use and the overuse of phosphorous in animal feeds.

2.4.3 Woodland and Forestry

West Sussex is the second most wooded area in the region with 37,500 hectares of woodlands covering 18.9% of the county's land area in 2002. Woodland area has also been growing – in 1980, 17.4% of the land of West Sussex was woodland. Much of

[1] Based on the monitoring of small animals (invertebrates) present in river lengths

this woodland expansion is unmanaged because of the low income on the lower grade timber being produced. There is evidence that some of this expansion of woodland cover has caused environmental degradation to non wooded habitats and may have an impact on biodiversity. Nevertheless, the woodlands may be an important economic asset to West Sussex, as the natural environment is one of the factors helping to attract and sustain higher value businesses bringing employment to rural areas.

2.4.4 Farmland

The area of West Sussex devoted to farmland uses declined by 6% from 127,000 hectares to 120,000 hectares from 1990 to 2004. This decline was in line with the regional average, but more rapid than the 2% decline seen across England over the same period. However, although the decline of agriculture is well documented, there are indications that the sector has stabilised and in some areas is growing in West Sussex.

The total number of farm holdings fell in West Sussex from 2,320 to 2,240 between1990 and 2000, but expanded again to 2,370 by 2004. The recent growth was driven mainly by increases in the number of small plots (5 acres or less), and by expansions in lowland grazing and 'other' farms (which includes specialist farming which does not fit easily within mainstream farm types as well as uses that are not economically significant such as grazing fields without livestock).

The apparently stable state of farming in West Sussex has not translated into jobs and demand for labour continues to decline albeit at a less rapid rate than in previous years: total labour employed in agriculture fell from 9,600 in 1990 to 7,400 in 2000; and then to 7,300 in 2004. This may have been driven by productivity gains, but those normally employed in agriculture may face difficulties in adjusting to finding employment in other sectors.

2.4.5 Designated Landscapes

The environmental assets of West Sussex' are recognised by three Areas of Outstanding Natural Beauty (AONBs) which cover over half of the land area of the County. These are the Sussex Downs, the High Weald and Chichester Harbour. The High Weald covers a small part of West Sussex in the north east of the county, Chichester Harbour covers a further area around the harbour in the south west, while the Sussex Downs is a prominent north-facing downland scarp, which runs almost continuously from Eastbourne to Hampshire covering around forty percent of the land area across the, middle of the county. These landscapes are important habitats for wildlife and provide a rich diversity for agricultural land use. The areas attract visitors to the county and provide environmental benefits for residents.

West Sussex also contains two National Nature Reserves; a woodland pasture (Ebernoe Common) to the north of Arundel and Kingley Vale, a spotlight nature reserve. The latter in particular, a woodland area north west of Chichester, is an important archaeological site as well as one of significant biodiversity importance. These environmental assets benefit the county, making the area more attractive for residents, as well as attracting tourism income from other areas of the country. The NNRs (National Nature Reserves) are complemented by a further 5 Special Areas of Conservation.

There are 78 Sites of Special Scientific Interest (SSSIs) in West Sussex, and most of these are in rural areas. 87.2% of SSSIs in West Sussex were in favourable condition in 2005, in comparison to 77.7% across the South East as a whole. The conditions of SSSIs in West Sussex were favourable in comparison to the county, but an English Nature (now Natural England) report stated that loss of traditional management has affected woodland SSSIs in the Weald and freshwater wetlands have faced problems of water resource management and quality.

2.5 Key Messages

- Overall, rural areas of West Sussex are affluent, with apparently little in the way of the problems caused by unemployment or deprivation, and incomes are generally high.

- Rural parts of the county have proven a desirable place to live, with the population growing rapidly particularly among those age groups likely to command higher disposable incomes. This will have benefited local service economies, but is likely to have helped contribute to high house prices. Affordability will be an issue for those on low incomes, and it is important to consider how the supply of affordable housing can be boosted to ensure that low income workers are not excluded from housing services while ensuring that the character and quality of rural areas is not lost.

- The economic contribution to the county is small, accounting for just 17% of total employment. There is a strong presence of the self-employed with , 'home based business' playing an increasingly more prominent role within the sub-regions 'rural economy', suggesting that the growth in good high speed broadband connections is providing more opportunities for rural residents. Residents need to out-commute, so transport accessibility (particularly for the small proportion that do not own a car) is crucial for those residents with low incomes who need to access jobs in service centres. While unemployment is low, and the labour market operates efficiently for most, there is a growing group of those in long term unemployment for whom accessibility may be an important contributing factor. Job brokerage and training projects that are tailored to the demands of remote rural areas may help ensure that long term unemployment does not become a severe problem in the future.

- Transport infrastructure is strong in the east and south of the county but weaker towards the west, and may mean that travel options are limited for these residents. Although flexible bus provision provides additional transport services, these will be less efficient than direct links and may not be entirely suitable for commuting purposes. Provision of other services, including education, leisure and health services is also less dense in the western part of the county meaning choices may be limited. Opportunities to boost the transport and education infrastructure are likely to be narrow, and boosting the quantity of local jobs may be difficult without either damaging the character of rural areas and demand for employment floorspace may be low in remote areas. However with the proliferation of broadband, it may be possible to stimulate a growth in Home based businesses and working from home.

- West Sussex benefits from a high quality environment including large areas designated as Areas of Outstanding Natural Beauty, Nature Reserves, and SSSIs, and there are a number of attractions to enhance the offer of the county for tourism. This has benefited local residents, and may act as a counterbalance for the declining labour demand from agriculture with the tourism sector accounting for 14 % of employment in 2004. However, the tourism sector does not offer high incomes, and this may help encourage a concentration of individuals at the lower end of the income distribution for whom the remoteness of rural areas creates difficulties. Efforts could be made to facilitate access to training for this group so opportunities for alternative career paths could be considered.

- The question of National Park status for the Sussex Downs AONB and the East Hampshire AONB remains, at this point, unresolved. The eventual decision will clearly have implications for arrangements for the ongoing management of the landscape and recreation within the Downs and western heathlands.

Annex One: Glossary

Glossary and Abbreviations used within the West Sussex Rural Profile

Term/Abbreviation	
AONB	Area of Outstanding Natural Beauty
A8 Countries	Reference to the influx of migrant and seasonal workers who have arrived from Eastern Europe, predominantly Poland, Lithuania, Latvia, Estonia, Romania, Slovakia, Czech Republic, Hungary and Slovenia
CLG	Department for Communities and Local Government
DEFRA	Department for Environment, Farming and Rural Affairs
DSL	Digital Subscriber Line
DWP	Department for Work and Pensions
FE	Further Education
GVA	Gross Value Added
HE	Higher Education
IB	Incapacity Benefit
ICA	Invalid Carers Allowance
IMD	Indices of Multiple Deprivation
JSA	Jobs Seekers Allowance
LEA	Local Education Authority
LSC	Learning and Skills Council
LSP	Local Strategic Partnership
NFU	National Farmers Union
NNR	National Nature Reserves
ODPM	Office for the Deputy Prime Minister
ONS	Office for National Statistics
SERAF	South East Rural Affairs Forum
SERP	South East Rural Partnership
SSSI	Site of Special Scientific Interest
SOA	Super Output Area
Sustrans	The UK's leading sustainable transport charity
VCS	Voluntary and Community Sector
WRS	Workers Registration Scheme
WSCC	West Sussex County Council
WSRP	West Sussex Rural Partnership

Annex Two: Bibliography

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