



GREATER BRIGHTON ECONOMIC BOARD

**GREATER BRIGHTON AND COASTAL WEST
SUSSEX BACKGROUND PAPERS**

Greater Brighton & Coastal West Sussex Background Papers

Executive Summary

May 2015



Nathaniel Lichfield
& Partners
Planning. Design. Economics.



Introduction

This Executive Summary report has been prepared to accompany a series of background papers that consider strategic issues relevant to achieving long-term sustainable growth in Greater Brighton and the wider Coastal West Sussex area ('GBCWS') between 2015 and 2025.ⁱ

The papers have been developed by Nathaniel Lichfield & Partners (NLP) and Interfleet Transport Advisory (ITA) with three considerations in mind:

1. The background papers focus on the three topic areas of **economy**, **housing market** and **transport system**. The papers review existing evidence and identify cross-cutting themes relevant to future strategy in the GBCWS area in these respects.ⁱⁱ
2. The analysis is scoped to include both **Greater Brighton** and the wider **Coastal West Sussex** area (see Figure 1)ⁱⁱⁱ, drawing together evidence to consider how these areas currently inter-relate with each other and how this might change in the future.
3. The papers seek to identify potential **future opportunities and actions** to collectively support the long-term growth needs and ambitions of the two areas across the three topics.

The process for preparing the background papers has followed a three-stage methodology:

1. evidence review and data gathering;
2. synthesis and identification of key themes; and
3. identifying implications and intervention options.

This has been informed by consultation and engagement with a range of stakeholders including an officer workshop and presentations of emerging findings to relevant groups.

Purpose

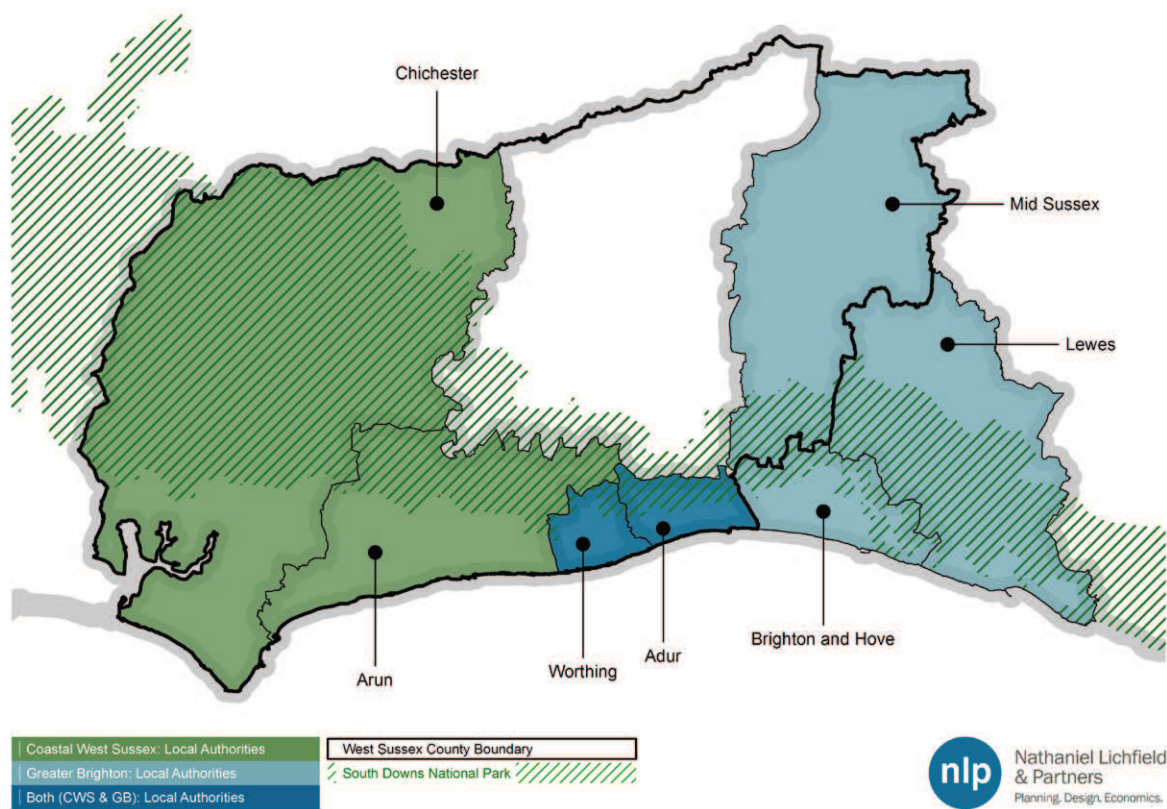
The brief for the background papers identifies that achieving long term sustainable growth across GBCWS will depend on addressing key strategic issues – notably employment land, housing, transport and other infrastructure – in an integrated and deliverable way. These factors are individually and collectively critical as drivers of growth^{iv}:

- **Economy** – the scale and concentration of businesses and sectors, and particularly the extent to which clusters of related or complementary activities can drive wealth-generating activity and new business creation.
- **Housing market** – a major determinant of access to labour supply and human capital required to support economic growth and innovation, but also as a source of demand for goods and services.
- **Transport system** – critical to determining the relative physical connectivity between businesses, suppliers, workers and consumers, and the costs, time and reliability of these connections.

Analysing the local assets and dynamics related to these drivers, as well as their interactions with each other, provides a basis for thinking about potential actions and strategies for supporting long-term growth across GBCWS.^v

The headline findings of the analysis, strategic implications and potential opportunities and actions are set out on the following pages.

Figure 1: Spatial Definition of Greater Brighton and Coastal West Sussex



Economy:

Broader foundations for growth

GBCWS is a significant economic sub-region, accounting for nearly half of all jobs within the Coast-to-Capital Local Enterprise Partnership area and having recorded faster job creation rates in proportionate terms than some other LEP areas in the wider South East. Brighton & Hove is the largest and fastest growing local economy within the area and has expanded significantly over the past decade. Particular strengths include a blend of high growth sectors, access to universities, and high levels of new business creation. Across GBCWS, recent trends indicate that the share of jobs focused in the urban centres has increased relative to the more rural areas over time. Looking ahead, employment forecasts indicate potential for 57,000 new jobs by 2031 across GBCWS, which in line with past trends will be mainly focused in Brighton & Hove and Chichester although all areas are expected to register net job gains.

The workforce skills profile in GBCWS is also relatively strong. A large share of the resident labour force is employed in higher skilled roles, with Brighton & Hove, Lewes and Chichester supporting the largest proportions. Significantly the area overall is a large exporter of skilled workers to other locations (notably Greater London) at levels equivalent to nearly a third of all higher skilled residents within GBCWS.



A number of future challenges can be identified. Although the growth of the Brighton & Hove economy is a critical driver of the economic strength of the area, the City is physically constrained (particularly employment land) and increasingly congested which may begin to erode its competitiveness for leading growth sectors. This is particularly critical as businesses mature and scale-up (i.e. move on from the start-up phase) to become larger businesses. At the same time, some adjoining parts of Coastal West Sussex have not yet developed the broader mix of sectors or skills base that can sustain higher levels of jobs and economic output, but do offer capacity for future growth including on new strategic employment and housing sites identified in Local Plans. Individual initiatives are underway in some of these areas to help grow sectors and build new economic strengths, including through investment in infrastructure.

Strategic Implications:

- a. **Adopt a polycentric growth strategy:** plan for a wider distribution of growth by developing a complementary offer across all parts of GBCWS, to help retain new and growing businesses and skilled workers who currently commute elsewhere.
- b. **Raising productivity and output in all areas:** support future growth needs within the area and the transition to higher-value sectors and more polycentric growth through targeted investment (including skills base).
- c. **Broaden employment land supply:** explore potential for intermediate employment space and site opportunities, particularly in locations closest to Brighton & Hove, that can provide a 'stepping stone' for expanding businesses and complement future strategic site propositions.

Potential Opportunities and Actions:

Strategy element	Opportunities and actions	Relevant Themes		
		Economic Growth and Sectors	Access to Labour Force	Provision of Employment Space
1. Develop polycentric growth strategy for GBCWS	<ul style="list-style-type: none"> Identify the key strengths and opportunities for clustering across GBCWS, including 'mapping' of sectors to land and infrastructure requirements Define a complementary role for each part of GBCWS, and develop coordinated economic strategy Coordinated approach to retaining growing businesses by offering scale-up potential in accessible or proximate locations 	✓✓	✓	✓
2. Ensure economic activity is retained within the sub-region	<ul style="list-style-type: none"> Analyse growing business needs from main centres of activity (i.e. Brighton & Hove, Chichester) Work with expanding firms to identify future requirements for resources and space Promote the potential of new strategic employment sites (see 4 below) 	✓	✓	✓
3. Raise productivity levels and economic output	<ul style="list-style-type: none"> Accelerate growth in high growth sectors through targeted investment in new initiatives Help low-growth legacy companies to repurpose assets and adopt new technologies Support existing companies to retain local HQs and/or encourage local expansion Expand skills and training programmes for sought-after skillsets and to help address skills deficits in some locations 	✓✓	✓	
4. Ensure adequate provision of employment space to meet business needs	<ul style="list-style-type: none"> Devise realistic delivery programme for strategic sites that are planned Identify dedicated resources to support delivery and to promote new sites to market (linked to 5 below) Address the 'missing middle' in employment land supply terms, and use this as an opportunity to promote other locations 	✓		✓✓
5. Make GBCWS a premier investment location	<ul style="list-style-type: none"> Leverage the Brighton & Hove 'brand' to articulate the economic potential of the wider area Seek cross-area place marketing to maximise potential in a crowded investment marketplace (e.g. 'Superfused') Develop institutional capacity to enable more unified approach across GBCWS to meeting indigenous and inward investment needs (in liaison with LEP) 	✓	✓	✓

Source: NLP analysis

✓✓ = Major contribution to theme | ✓ = Supporting contribution to theme

Housing Market: Meeting needs and providing choice

The population of GBCWS has been expanding including through significant levels of in-migration from other parts of the UK, notably younger working-age groups from Greater London (mainly to Brighton & Hove). This has helped increase the overall working-age population of the area in turn supporting job growth. The local population is highly mobile demonstrated by internal migration flows within the area, notably outwards from Brighton & Hove, mainly due to housing costs and more limited accommodation choice within the City.

Constrained housing supply and increasing costs are creating a number of pressures: these include affordability challenges for residents and businesses (as some commercial space is redeveloped or converted to residential use) and on the transport system as workers who move (particularly out of Brighton & Hove) commute across the area to access jobs and services.

The GBCWS local authorities are currently planning to provide c.30,500 new dwellings through Local Plans over the period to 2025, which existing evidence indicates may be lower than the level of housing growth required to meet forecast demographic and economic needs within the area.^{vi} The evidence also points to the need to broaden the current choice of housing types in some locations so that the housing needs of different groups can be met more effectively and reducing the need for people to move further away (and potentially outside of GBCWS) to secure the type of housing they require. The South Downs National Park Authority is also at the early stages of preparing a Local Plan, which will include a housing requirement focused on meeting local affordable needs.



Local authorities have identified capacity for c.36,000 dwellings to be delivered by 2025 through their housing trajectories. This implies an uplift of nearly 50% on past housing completion rates in the area. Nearly 60% of planned dwellings are on medium and large sites with the majority focused in the western part of GBCWS, particularly Arun and Chichester.^{vii} Larger development sites typically have longer lead-in times and early work is required if the identified sites are to have a realistic prospect of delivering within the next 10 years, but do offer the opportunity to put in place up-front infrastructure in a coordinated and phased way. This is particularly important in respect of potential improvements to the transport network that can help improve the connections between new strategic sites and existing centres of employment and services.

Strategic Implications:

- a. **Explore opportunities to meet unmet housing needs:** authorities should continue and develop duty-to-cooperate discussions within and without the boundaries of the GBCWS area, and consider options for developing an over-arching spatial framework to guide future delivery.
- b. **Broaden housing choice:** consider stock and tenure patterns to frame strategies for broadening housing choice – particularly needs arising from more constrained locations – including on new strategic sites.
- c. **Focus on delivery of strategic sites:** local stakeholders need to ensure delivery of strategic sites moves forward quickly, and coordinate this with new infrastructure investment that can improve sustainability of peripheral locations and connectivity to main centres; engagement with the wider development industry will be key to help drive delivery.

Potential Opportunities and Actions:

Strategy element	Opportunities and actions	Relevant Themes		
		A Growing and Mobile Population	Meeting Future Housing Requirements	Delivering New Housing Supply
1. Explore long-term opportunities to meet unmet housing needs	<ul style="list-style-type: none"> Continue and develop duty to cooperate discussions to explore long-term opportunities to meet unmet housing needs Consider options for developing an over-arching spatial framework to guide future delivery Explore opportunities with local planning authorities outside of the GBCWS boundary 	✓	✓✓	✓
2. Widening the choice of housing supply	<ul style="list-style-type: none"> Analyse the housing needs of those unable to meet their housing choices in constrained locations Consider the potential to broaden the range of stock and tenure on strategic sites in conjunction with pump-priming of new public transport provision (e.g. more frequent bus connections) Although it is easier to widen types of supply when there is greater physical capacity, opportunities to specify the types of housing to be delivered even in constrained authorities should be considered 	✓✓	✓	✓
3. Ensuring early delivery of housing sites in GBCWS	<ul style="list-style-type: none"> Put in place measures to necessitate technical evidence to improve prospects of projected delivery rates being achieved Increase delivery coming from smaller sites should the delivery of strategic sites take longer than currently projected Work either alone or with developers to ensure that major infrastructure/other constraints are delivered at the earliest opportunity. This may include identifying funding. Potential to identify dedicated resources to support delivery of strategic sites and key development areas to help co-ordinate the process (linked to 4 below) 	✓	✓	✓✓
4. Engaging with developers and investors to help support delivery	<ul style="list-style-type: none"> Engage with a wider range of investors and developers within and outside of the region to encourage delivery of stalled sites and improve capacity to help support delivery Explore potential scope for public private sector partnerships to deliver portfolios of smaller sites (e.g. joint ventures, Local Asset Backed Vehicles) 		✓	✓✓

Source: NLP analysis

✓✓ = Major contribution to theme | ✓ = Supporting contribution to theme

Transport System: Towards an integrated transport strategy

An efficient and effective transport system is critical to the success of GBCWS as a location where many economic opportunities exist in close proximity to each other, but also given the functional economic and housing market relationships with adjoining areas such as Crawley/Gatwick Diamond and Greater London. The area is characterised by high levels of short and medium length trips being made by car together with significant levels of non-car travel in urban centres such as Chichester and Brighton & Hove. Brighton & Hove, in particular, has made significant gains in growth of non-car travel over the past decade.

Many of the area's transport pinch-points are well-documented and some improvements have already been made or are planned.^{viii} The currently poor levels of east-west connectivity across GBCWS by road and rail represent a particular limitation, notwithstanding that a wider distribution of both housing and employment development is planned in the future, while the main urban centres will continue to grow. Transport improvements can support job growth in existing high employment areas within and outside of GBCWS by improving commuter access (through increased speed, reliability or comfort) and also job growth in new areas by connecting them to the wider economy. As noted above, new strategic housing and employment site opportunities present opportunities to front-load new infrastructure delivery and expand public transport provision that works with the grain of planned growth.



Improvements along the A27, increasing connectivity through improvements to bus and rail provision and increasing the role of non-car modes in urban areas have all been identified as measures to support economic growth. However, some measures imply potential choices and trade-offs. For example, creating a more attractive rail service across the area with express services may compromise the 'metro' nature of existing Greater Brighton rail services or require significant investment in order to create an enhanced service which meets both local and longer distance needs. These choices will require further appraisal, but above all need to be considered through the lens of a more integrated transport strategy for GBCWS that needs to be developed.

Strategic Implications:

- a. **Improve access to labour markets:** the region needs to be allowed to grow by relieving some pressure points and encouraging growth in less constrained areas. This is consistent with adopting a more polycentric approach to growth.
- b. **Improve connectivity across the region:** the sum of the Greater Brighton and Coastal West Sussex area is greater than the individual parts and improving connectivity across the region will increase market size and enable off-peak trips which can contribute to the wider economy.
- c. **Increase non-car mode share:** non-car modes have been proven to support economic growth (particularly in Brighton & Hove) through the creation of capacity as well as improvements in overall environment.

Potential Opportunities and Actions:

Strategy element	Relevant Themes			Delivery Stakeholders
	Access to labour	Improving area-wide connectivity	Improving non-car mode choice	
A27 pinch point relief: E-W/Brighton incl Brighton by-pass junctions	✓✓	✓✓		Highways Agency, DfT, Local Authorities,
Removing bottlenecks around ports		✓✓		Local Authorities, Port Authorities, Port owners (if not owner)
West Coastway -Brighton rail capacity	✓✓	✓✓	✓✓	Network Rail, DfT, TOC, Local Authorities
Brighton Mainline capacity	✓✓	✓✓	✓✓	Network Rail, DfT, TOCs, Local Authorities
Service pattern improvements: B&H, mid-Sussex and Crawley/ Gatwick	✓✓	✓✓	✓✓	Network Rail, DfT, TOCs, Local Authorities
East of Brighton rail service improvements	✓✓	✓✓	✓✓	Network Rail, DfT, TOCs, Local Authorities
Rail journey time improvements	✓✓	✓✓	✓✓	Network Rail, TOCs, DfT, Local Authorities
New direct route services via schemes such as Arundel Chord	✓✓	✓✓		Network Rail, DfT, TOCs, Local Authorities
Last mile peak-time access to larger urban areas:				Highways Agency, Local Authorities, bus operators, developers
• Traffic flow management through ITS and transport choice	✓	✓✓		
• Park & Ride options	✓	✓✓	✓✓	
Non-car mode choice:				Local authorities, developers, local business, (e.g. new tenants on strategic sites), potential sponsors
• Improvements to way finding, pedestrian prioritisation, safe havens			✓	
• Bicycle friendly traffic engineering	✓	✓	✓	
• Quiet/safe route creation	✓	✓	✓	
• Residential and workplace secure storage	✓	✓	✓	
• City bike schemes for business travel		✓	✓✓	
• Wheels2Work expansion	✓✓	✓	✓✓	

Source: ITA analysis

✓✓ = Major contribution to theme | ✓ = Supporting contribution to theme

Strategy element	Relevant Themes			Delivery Stakeholders
	Access to labour	Improving area-wide connectivity	Improving non-car mode choice	
Integrated ticketing	✓	✓✓	✓✓	Local Authorities, bus operators, TOCs,
A review of bus fares and affordability	✓✓	✓	✓	Local authorities, operators
Mixed mode choice for port access (remove pedestrian/commercial vehicle conflict)			✓✓	Local Authority, Port Authorities, Port operators
Improvement in freight route management		✓✓		Highways Agency, local authorities, Port Authorities, Port operators

Source: ITA analysis

✓✓ = Major contribution to theme | ✓ = Supporting contribution to theme



Framing a Spatially Integrated Strategy

Greater Brighton and Coastal West Sussex represent two distinct yet highly inter-connected areas, creating growth opportunities and challenges for each.

The practical challenge in **Greater Brighton** is how the future needs (for both employment and housing) of the City can be accommodated in such a way that its competitiveness is not unduly constrained. The factors that have made Brighton & Hove a highly effective generator of jobs, rising productivity and incubator for new businesses over the past decade need to be protected and enhanced, with critical thinking required for how the needs of the City's leading sectors can now be met as they mature and scale-up. However, the strategy also needs to recognise that adjoining authorities have their own needs and economic priorities to consider, recognising that outwards expansion from Brighton & Hove (and other locations including the Gatwick Diamond) will offer potential to access high-value growth sectors.

Coastal West Sussex has, so far, had a slower growth trajectory and retains a more 'traditional' economic fabric (apart from Chichester which functions as a significant service centre in its own right), and with generally poorer levels of transport connectivity. However, the role of the area is set to change: part as a result of the planned supply of new strategic employment and housing sites set out in Local Plans, and part due to the general outward migration from the main centres through the functioning of the housing market which looks set to continue. This will provide opportunities to support growth and define a broader economic role for parts of Coastal West Sussex, whilst acknowledging that the South Downs National Park and sensitive environmental designations are also important factors shaping development in this area.

In future, there is likely to be some greater correlation between the economic performance of Greater Brighton and Coastal West Sussex as the two areas become even more inter-connected. Drawing on capacity from across GBCWS will support the ability to achieve growth in a complementary way (and hence retain it within GBCWS), whilst diversification will benefit local economies outside what are currently the main growth 'hotspots'. In this way, maximising the efficiency and effectiveness of the internal transport connectivity that joins the two areas will be fundamental to achieving the strategy.



Endnotes

ⁱ This reflects the timescale of the refresh of the Local Strategic Statement (LSS) by the Coastal West Sussex and Greater Brighton Officer Programme Board and Coastal West Sussex and Greater Brighton Local Strategic Statement to be prepared jointly with the Greater Brighton Economic Board (under the auspices of the Office Programme Board).

ⁱⁱ It should be noted that this is not necessarily an exhaustive literature review but is based on a filtering of the existing evidence of most relevance at the strategic level. The papers have incorporated the latest data and other evidence available at the point of preparation. The accuracy of data derived from third party sources has not been checked or verified by NLP or ITA.

ⁱⁱⁱ Greater Brighton incorporates the City of Brighton & Hove, Adur and Worthing, Lewes and Mid Sussex, while Coastal West Sussex also including Adur and Worthing alongside Arun and Chichester. These areas incorporate parts of the South Downs National Park Authority.

^{iv} These issues are considered in more detail in a range of current literature on urban economic competitiveness, including for example Industrial revolutions: capturing the growth potential (McKinsey & Company/Centre for Cities, 2014) and Delivering change: making transport work for cities (Centre for Cities, 2014).

^v See individual papers for more detailed commentary on potential opportunities and actions that have been identified for each of the topic areas.

^{vi} Based on evidence contained within the Coastal West Sussex Strategic Housing Market Assessment (2013) and Mid Sussex Housing and Economic Development Needs Assessment (draft, 2015). Figures exclude South Downs National Park Authority for which a Strategic Housing Market Assessment is currently being prepared but not available at the time of writing.

^{vii} Defined as sites with capacity in excess of 100 dwellings.

^{viii} See for example the A27 Corridor Feasibility Study published by the Department for Transport in March 2015.



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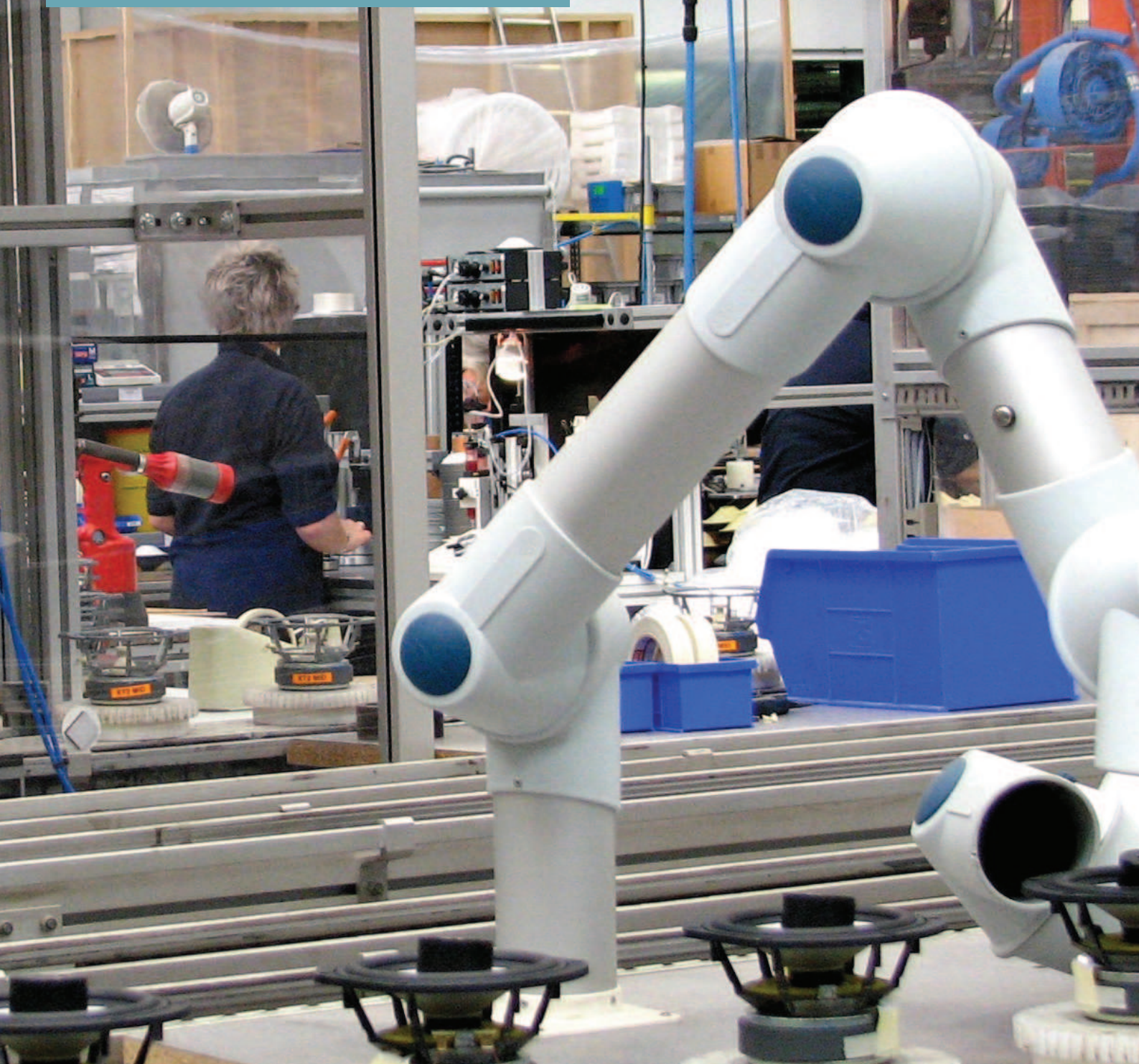
Greater Brighton & Coastal West Sussex Background Papers Background Paper 1 Economy

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**Greater Brighton & Coastal West
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Background Paper 1 - Economy

In association with



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1.0

Introduction

The Greater Brighton Economic Board ('the Economic Board'), working in partnership with the Coastal West Sussex and Greater Brighton Strategic Planning Board ('the Strategic Planning Board'), commissioned a series of background papers to provide evidence and inform decision-making within Greater Brighton and Coastal West Sussex ('GBCWS').

1.1

The three background papers focus on:

- 1 Economy (this paper)
- 2 Housing Market
- 3 Transport System

1.2

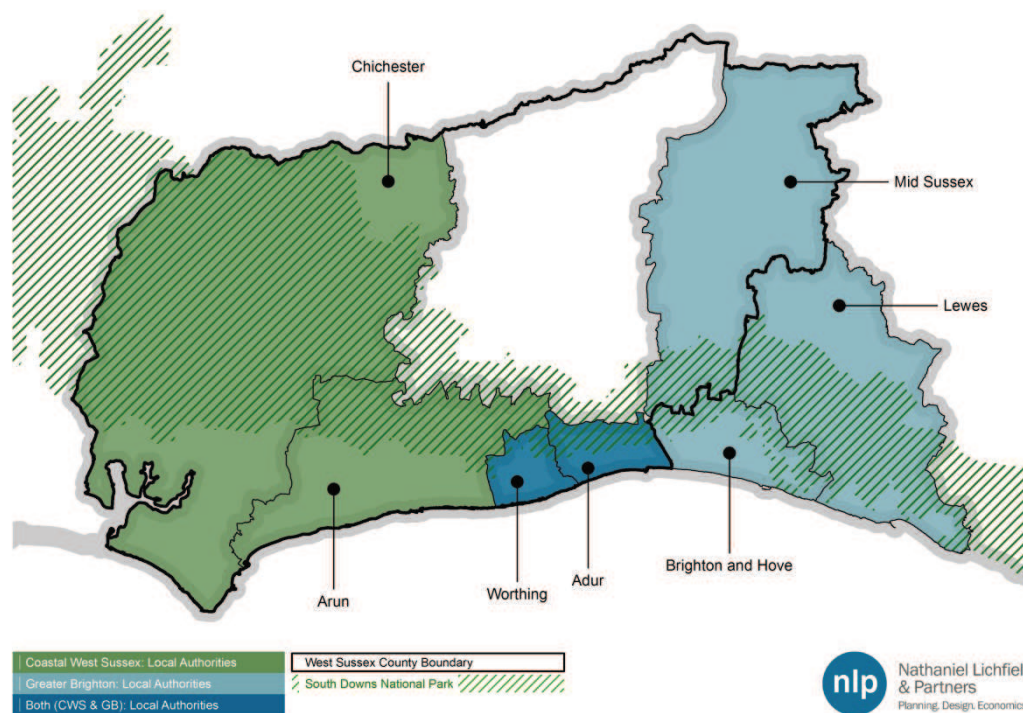
The papers have been developed by Nathaniel Lichfield & Partners ('NLP') in association with Interfleet Transport Advisory ('ITA'). An overarching Executive Summary has also been produced to accompany the individual papers.

Background

1.3

Greater Brighton and Coastal West Sussex together comprise seven local authorities and parts of the South Downs National Park Authority (SDNPA) as shown in Figure 1.1. 'Greater Brighton' includes Brighton & Hove, Adur & Worthing, Lewes and Mid Sussex. 'Coastal West Sussex' refers to Adur & Worthing, Arun and Chichester. It should be noted that Adur & Worthing are included within both geographies.

Figure 1.1 Spatial Definition of Greater Brighton and Coastal West Sussex



- 1.4 The **Greater Brighton Economic Board** was established in March 2014 to bring together city region leaders, business partners, universities, further education partners and the Coast to Capital Local Enterprise Partnership (LEP) to unlock barriers to the economic prosperity of the Greater Brighton City Region. The Board has been formally recognised by Government and forms a key aspect of the LEP's distributed governance and accountability structure for the delivery of the LEP's Strategic Economic Plan and Growth Deal.¹
- 1.5 The Local Planning Authorities within the Coastal West Sussex and Greater Brighton area formed the **Coastal West Sussex and Greater Brighton Strategic Planning Board** to identify and manage spatial planning issues that impact on more than one area, and support better integration and alignment of spatial and investment priorities.²

Purpose of the Background Papers

- 1.6 The brief for the project identifies that achieving long term sustainable growth across Greater Brighton and the wider Coastal West Sussex area will depend on addressing key strategic issues – notably employment land, housing, transport and other infrastructure – in an integrated and deliverable way.
- 1.7 At the 29 July 2014 meeting, the Economic Board agreed that three background papers should be commissioned which aim to support the Board to develop a greater understanding of the Greater Brighton and the wider Coastal West Sussex area around the three themes of economy, housing market and transport system.
- 1.8 Concurrent to this, the Strategic Planning Board is in the process of refreshing its Local Strategic Statement (LSS)³ which sets out long term strategic planning and investment priorities for an overlapping (although not contiguous) geography. It is the intention that a new Coastal West Sussex and Greater Brighton Local Strategic Statement will be prepared jointly with the Economic Board (under the auspices of the Officer Programme Board). This will draw upon the background papers to define priorities for the period 2015-2025, and support future funding bids and Local Plans through helping to facilitate meeting the Duty to Cooperate.

Structure of the Paper

- 1.9 The remainder of this paper is structured as follows:
- Section 2.0 outlines the **approach and methodology**.
 - Section 3.0 examines the economic fabric of the area with reference to **economic growth and sectors**.

¹ Greater Brighton City Deal, Deputy Prime Minister's Office, 12 March 2014, <https://www.gov.uk/government/publications/city-deal-greater-brighton>

² The Strategic Planning Board comprises Adur and Worthing, Arun, Brighton & Hove, Chichester, Lewes, Mid Sussex, West Sussex County Council and the South Downs National Park Authority.

³ Local Strategic Statement, October 2013, <http://www.coastalwestsussex.org.uk/wp-content/uploads/FINAL-Signed-LSS-for-CWS-Gtr-Brighton-30-Jan-14.pdf>

- Section 4.0 explores the area's **access to labour force**.
- Section 5.0 considers the area's **provision of employment space**.
- Section 6.0 draws together the thematic analysis to identify **potential opportunities and actions**.

2.0

Approach and Methodology

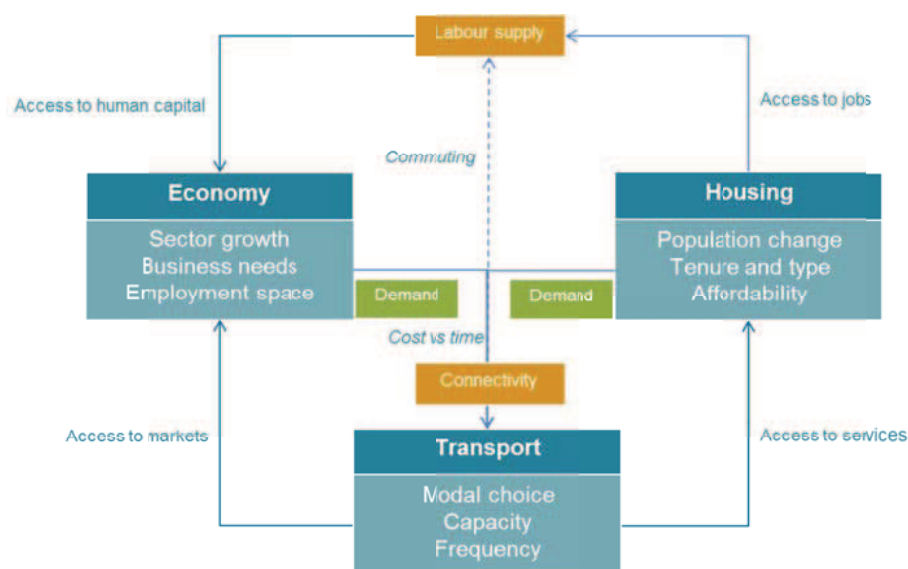
This section details the approach and methodology adopted by NLP and ITA for the purposes of preparing each of the background papers.

Approach

- 2.1 As noted in section 1.0, the purpose of the background papers is to help stakeholders within Greater Brighton and Coastal West Sussex consider how addressing strategic issues relating to the economy, housing market and transport can help achieve “*long-term sustainable growth*” for the area.
- 2.2 This analysis is being undertaken against the backdrop of significant change within the global economy, with a shift towards knowledge-based goods and services as the main drivers of productivity and economic growth. There is an increasing focus on innovation, flexibility and rapid adaptation to change so that economic assets can be used most efficiently and effectively (particularly in the context of competing locations).
- 2.3 Markets tend to operate across administrative geographies, and there has been recent attention on assessing needs across functional economic market areas.⁴ Sub-regions and greater metropolitan areas are identified as drivers of growth because of their role supporting clusters and agglomeration economies. The geographic proximity of economic assets and infrastructure can increase productivity through sustaining high-growth sectors and innovation, whilst the presence of universities and urban amenities tends to attract higher skilled workers and support new business creation.
- 2.4 This means growth of wider sub-regions is highly inter-dependent because they access shared labour and housing markets, transport networks and commuting patterns, and proximity to large institutions such as universities. Figure 2.1 outlines some of these inter-relationships to examine the role of the economy, housing market and transport system as drivers of economic growth:
- Economy – the scale and concentration of businesses and sectors, and particularly the extent to which clusters of related or complementary activities can drive support innovation and new business creation;
 - Housing market – a major determinant of access to labour supply and human capital that supports economic growth, but also as a source of demand for goods and services;
 - Transport system – transport is critical to determining the relative physical connectivity between businesses, suppliers, workers and consumers, and the costs, time and reliability of these connections.

⁴ See for example Planning Practice Guidance, paragraph 13

Figure 2.1 Inter-relationships between Economy, Housing and Transport Drivers of Growth



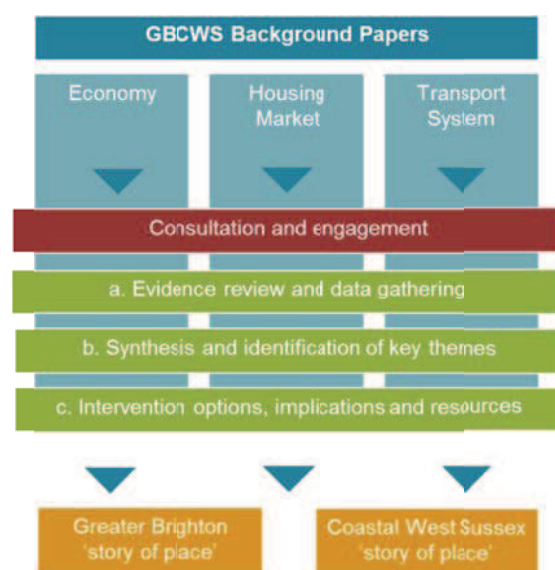
Source: NLP/ITA analysis

- 2.5 In combination, these drivers are major determinants of long-term growth. Analysing the local assets and dynamics related to each, as well as their interactions with each other, provides a basis for identifying actions and developing strategies that will help support an integrated approach to supporting long-term growth.

Methodology

- 2.6 The process for preparing the background papers has followed a three-stage methodology as set out in Figure 2.2, informed by stakeholder consultation and engagement at a number of stages.

Figure 2.2 Outline Approach for Background Papers



Source: NLP

a. Evidence review and data gathering

- 2.7 The preparation of the background papers has been underpinned by a series of key questions for the purposes of interrogating each of the economy, housing market and transport system topic areas:
- Economy: How big is the economy? What are the key sectors? How is the economy changing? What is the growth potential of the area? What is the skills profile of the area's labour force?
 - Housing market: How is the housing market area defined? What are the migration patterns within and without the area? How do house prices and affordability ratios vary across the area? What is the planned future supply of housing across the area?
 - Transport system: Where do people travel to work outside of the area? Where do people travel within the area? How do people travel, and how has this changed? What are the known transport constraints? Where is transport investment proposed?
- 2.8 The analysis draws upon existing evidence prepared at local authority, county and Local Enterprise Partnership scales supplemented by latest national datasets where available. It should be noted that this is not necessarily an exhaustive literature review but is based on a filtering of the existing evidence of most relevance to the analysis at the strategic level.
- 2.9 An important consideration for any work of this type is that it is inevitably a point-in-time assessment. This study has incorporated the latest data and other evidence available at the point of preparation. The accuracy and sources of data derived from third party sources have not been checked or verified by NLP or ITA.

b. Synthesis and identification of key themes

- 2.10 This stage involved drawing together the existing research alongside new analysis to identify a number of key 'themes' for the purposes of considering the dynamics of both Greater Brighton and Coastal West Sussex and the future growth potential of these areas individually and on a combined basis.
- 2.11 These themes have emerged from consideration of the economic position and potential of the area, and the factors most relevant to its economic performance. Across each topic this included an assessment of:
- the key features of Greater Brighton and Coastal West Sussex and the factors and trends that have influenced the area's position today;
 - what strengths have driven the area's past economic success (including whether they will continue in the future) and what weaknesses or barriers challenge the area's economic success (and whether these challenges/barriers are likely to worsen or improve in the future);

- the inter-relationships between the Greater Brighton and Coastal West Sussex and their wider hinterland, in order to understand how these could affect the economic performance of the area and how this could change in the future.

c. Intervention options, implications and resources

- 2.12 From the review of key themes, the relevant intervention options, implications and resources have been identified. This involves describing potential economic growth ambitions for Greater Brighton and Coastal West Sussex and the priorities for action that might be required to deliver them. These relate to areas where there is a potential role for public sector intervention to address market failures or to leverage resources to help support sustainable growth, through to broader advocacy of an integrated approach to strategy on the economy, housing and transport.
- 2.13 An important consideration is that Greater Brighton and Coastal West Sussex do not function in isolation from surrounding areas, and these wider relationships are relevant to all of the economy, housing market and transport themes. It should therefore be noted that, while the analysis focuses on Greater Brighton and Coastal West Sussex, factors arising from adjoining areas will also be relevant. This is particularly in the context of the future growth potential of areas including the Gatwick Diamond, South Hampshire and Greater London.
- 2.14 It should be noted that the evidence, analysis and implications set out within the three papers do not take account of any future decisions by national Government regarding a potential second runway at Gatwick Airport, a decision on which is currently anticipated in 2015.

Consultation and Engagement

- 2.15 Across each of the stages, consultation and engagement has been undertaken with a range of stakeholders from across Greater Brighton and Coastal West Sussex. Those consulted included relevant offices within each of the local authorities, including specialists within economic development, housing, planning policy and transport.
- 2.16 This consultation process was designed to ensure that each of the background papers benefited from access to latest evidence and data but also from qualitative inputs from relevant experts. Consultation took place through a number of formats, including presentations to Board and Officer Group meetings, roundtable discussions at a stakeholder workshop held in Worthing in February 2015, as well as some individual interviews. In addition, this work was coordinated through a Steering Group comprising representatives of the Economic Board and Strategic Planning Board.

3.0

Economic Growth and Sectors

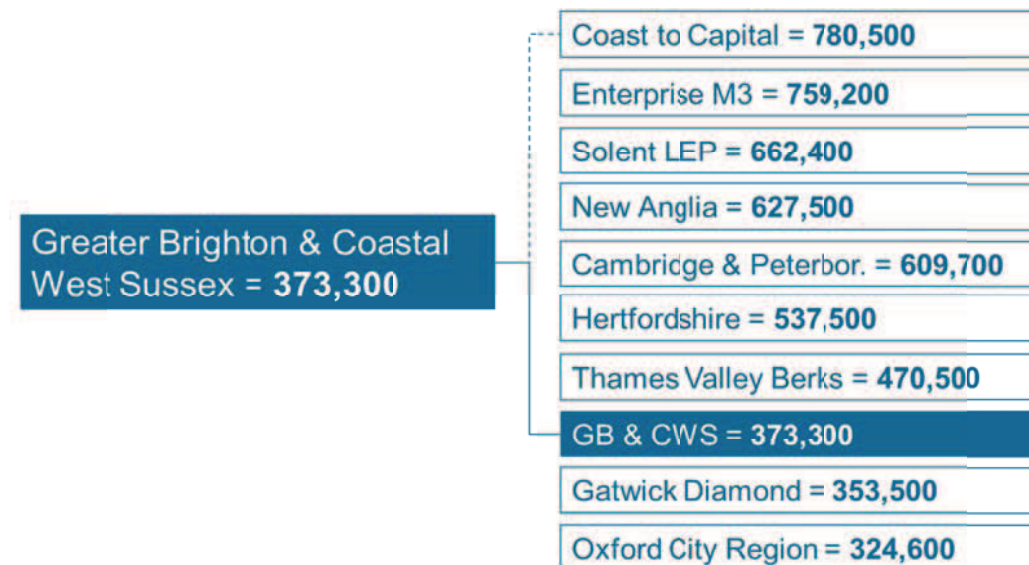
In order to understand the growth potential of the GBCWS economy, this section considers the scale of the area's economy against comparator areas, recent and forecast trends in employment growth, and the degree of sector specialisation and growth potential that exists.

Comparative Economic Scale

3.1

In 2013, the Greater Brighton and Coastal West Sussex economy supported approximately 373,300 employee jobs, equivalent to almost 50% of all employee jobs within the Coast to Capital LEP area (i.e. which includes GBCWS) (Figure 3.1).

Figure 3.1 Size of Employee Base by Economic Area, 2013



Source: NOMIS / NLP analysis

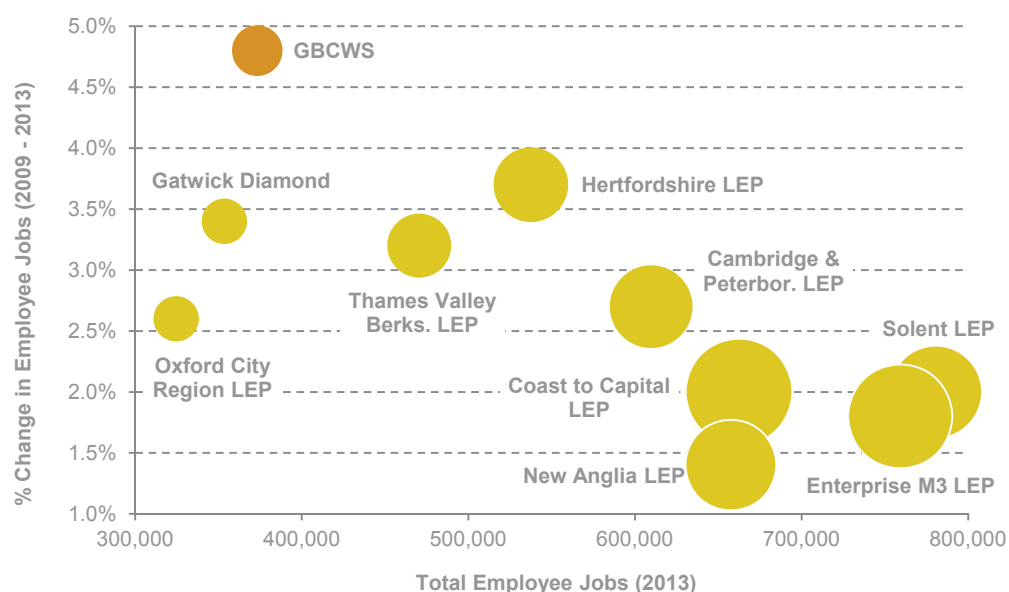
3.2

When compared with a range of other LEP areas positioned within the South East and East of England regions, it is apparent that the combined Greater Brighton and Coastal West Sussex area represents a sizeable economy. For example, the area has comparable job numbers to the Gatwick Diamond (353,500 jobs) and Oxfordshire LEP (324,600 jobs).

3.3

The area has also generated strong employment growth rates during recent years. Between 2009 and 2013, national statistics indicate that overall employee job growth in Greater Brighton and Coastal West Sussex equated to approximately 4.8%. Compared to other areas, GBCWS was one of the fast growing areas over this period (Figure 3.2).

Figure 3.2 Employment Scale and Growth for Comparator Areas / LEPs



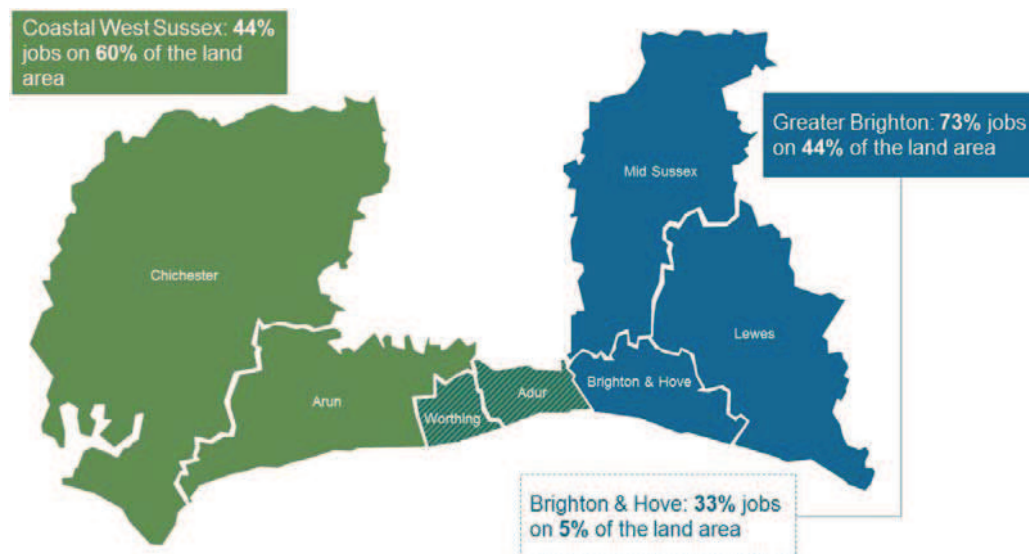
Source: ONS NOMIS / NLP analysis

Distribution of Employment

- 3.4 The majority of the economic activity undertaken within the sub-region is concentrated in a small number of locations, with Greater Brighton representing the key driver of economic growth. The economy of the area is also influenced by other growth locations, such as Crawley and the Gatwick Diamond more widely, as well as Greater London.
- 3.5 Latest available Experian data indicates that there were a total of 455,000 workforce jobs in Greater Brighton and Coastal West Sussex in 2014.⁵ Around 73% of these were within the 'Greater Brighton' area comprising the authorities of Adur, Brighton & Hove, Lewes, Mid Sussex and Worthing. More specifically within Greater Brighton, economic activities are highly concentrated within the local authority of Brighton & Hove (150,700 jobs) which alone accommodates a third of all workforce jobs within GBCWS. Coastal West Sussex (including Adur and Worthing) accommodated a total of 198,600 jobs in 2014 (Figure 3.3).

⁵ Experian produces detailed time-series data for the number of workforce jobs and economic output by local authority which are triangulated with reference to a range of ONS data sources, and therefore are not directly comparable to BRES data available via NOMIS.

Figure 3.3 Employment Distribution across Greater Brighton and Coastal West Sussex, 2014

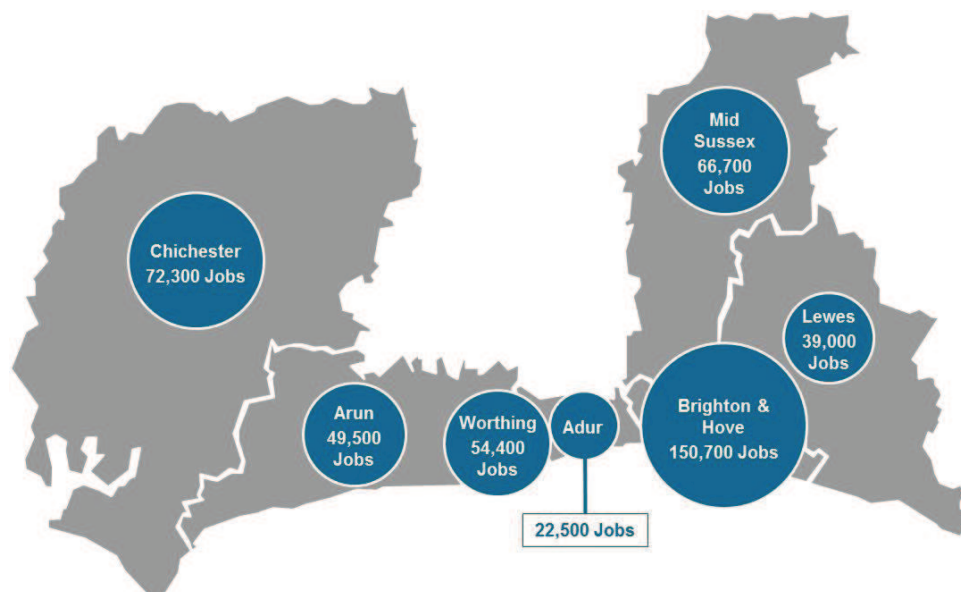


Source: Experian / NLP analysis

3.6

Brighton & Hove represents the largest economy in GBCWS with 150,700 jobs, over twice the size of Chichester which is the second largest economy with 72,300 jobs. Adur represents the smallest economy in employment terms with 22,500 workforce jobs (Figure 3.4).

Figure 3.4 Number of Workforce Jobs by Local Authority in GBCWS, 2014



Source: Experian / NLP analysis

3.7

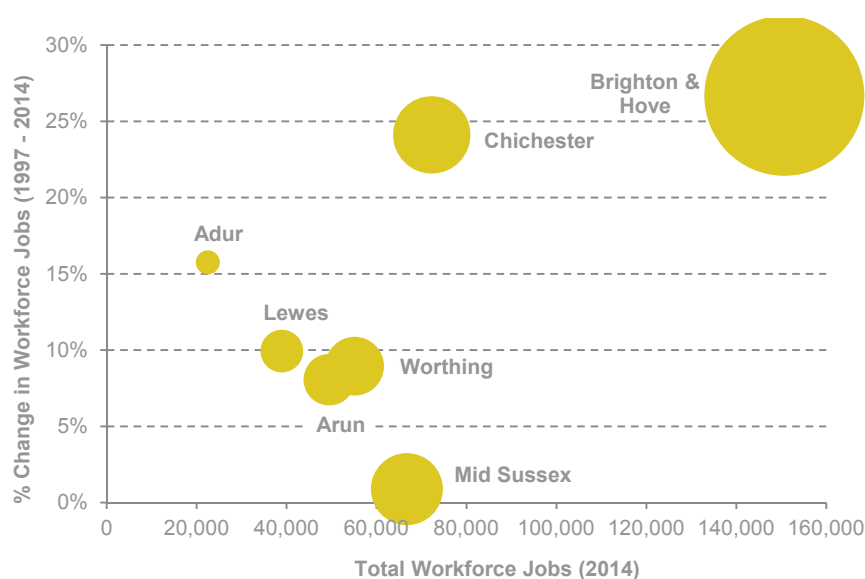
The distribution of economic activity is important given that the Greater Brighton area only accounts for about 44% of the total land area of Greater Brighton and Coastal West Sussex, which reiterates the fact that the majority of employment is spatially concentrated in a few key locations. Within this context, Brighton & Hove represents the most significant spatial concentration of employment within the Greater Brighton and Coastal West Sussex economy with around a third of all workforce jobs supported within 5% of the land area.

Employment Growth Trends

3.8

Between 1997 and 2014, total employment growth across Greater Brighton and Coastal West Sussex amounted to 60,400 jobs equivalent to 15% growth. The number of workforce jobs in Brighton & Hove increased by around 27%, which was the highest amongst all the authorities within the area, followed by Chichester (24%). Figure 3.5 highlights the role of Brighton & Hove and to a lesser extent Chichester as the largest and fastest growing economies within Greater Brighton and Coastal West Sussex respectively.

Figure 3.5 Employment Size and Growth by Local Authority, 1997-2014

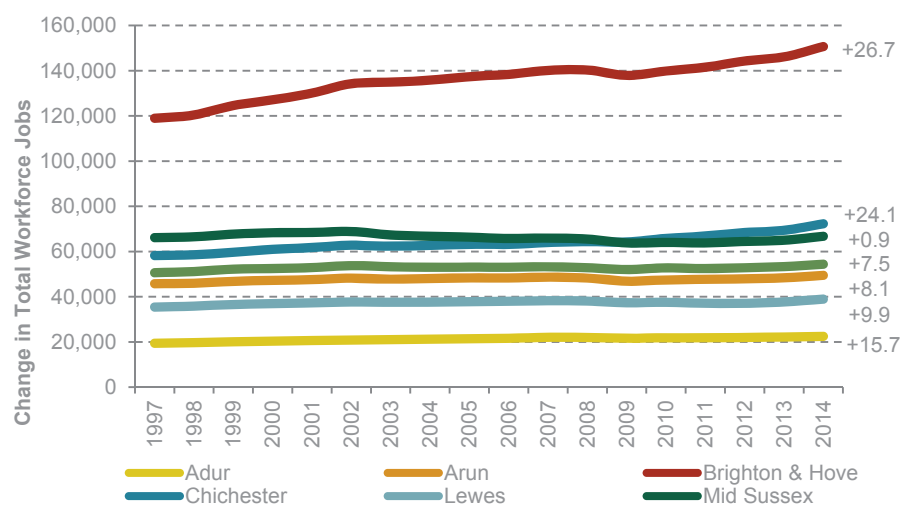


Source: Experian/NLP analysis

3.9

Figure 3.6 profiles employment change by local authority over the period since 1997. This indicates the profile of the increases in all authorities, but notably Brighton & Hove, Chichester and Adur in proportionate terms.

Figure 3.6 Employment Change by Local Authority, 1997-2014



Source: Experian/NLP analysis

3.10

The effect of these employment growth trends has been that the share of total jobs within Greater Brighton and Coastal West Sussex concentrated within the largest urban centres of Brighton & Hove and Chichester has increased over recent years (Table 3.1).

Table 3.1 Change in Proportion of Jobs Supported by Local Authority, 1997-2014

	% of Total Employment in GBCWS		Change in % Jobs Supported
	1997	2014	
Adur	4.9%	4.9%	0.0%
Arun	11.6%	10.9%	- 0.7%
Brighton & Hove	30.1%	33.1%	+ 3.0%
Chichester	14.8%	15.9%	+ 1.1%
Lewes	9.0%	8.6%	- 0.4%
Mid Sussex	16.8%	14.7%	- 2.1%
Worthing	12.8%	12.0%	- 0.9%

Source: Experian/NLP analysis

Employment Forecasts

3.11

Employment forecasts used to inform the respective Strategic Housing Market Assessments (SHMAs) for Greater Brighton and Coastal West Sussex indicate that Brighton & Hove and Chichester will remain important drivers of growth in the sub-regional economy. To some degree these forecasts reflect projections of population growth within each of the authorities, and therefore are affected by the extent to which housing delivery is able to meet demographic needs.

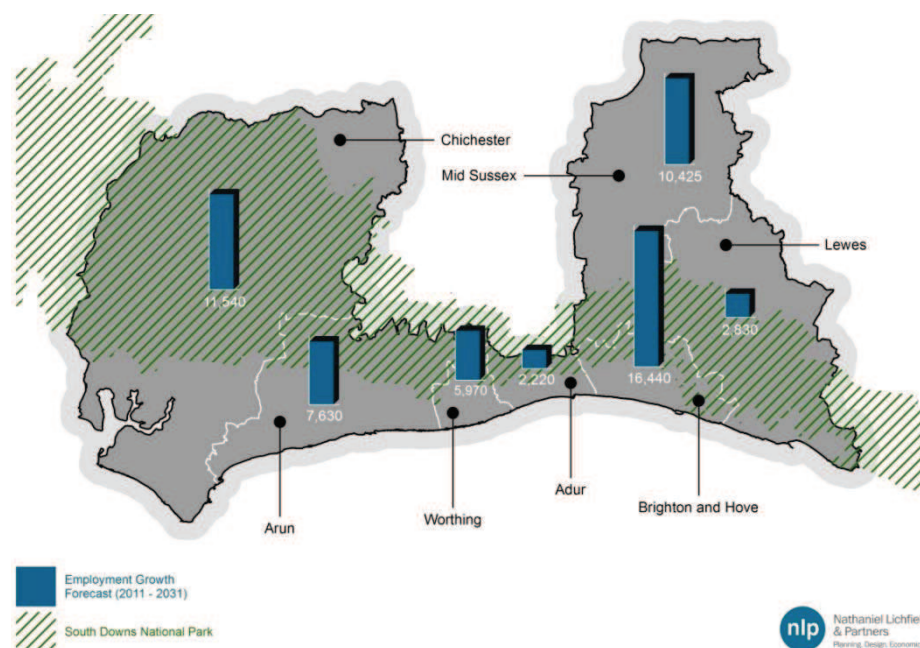
3.12

These forecasts estimate around 57,055 new jobs will be created across Greater Brighton and Coastal West Sussex by 2031, equivalent to about 2,850 jobs per annum. The largest increase is forecast for Brighton & Hove with 16,400 jobs (+29%), followed by Chichester with 11,500 jobs (+20%) and Mid Sussex with 10,435 jobs (+18%).

3.13

The forecasts imply total potential job growth for Greater Brighton up to 2031 of about 37,900 jobs, equivalent to 66% of the total forecast growth for the area. Forecast growth for Coastal West Sussex is 27,400 jobs if Adur and Worthing are included, or 19,200 jobs if only Arun and Chichester are considered.

Figure 3.7 Employment Growth Forecasts by Local Authority, 2011 - 2031



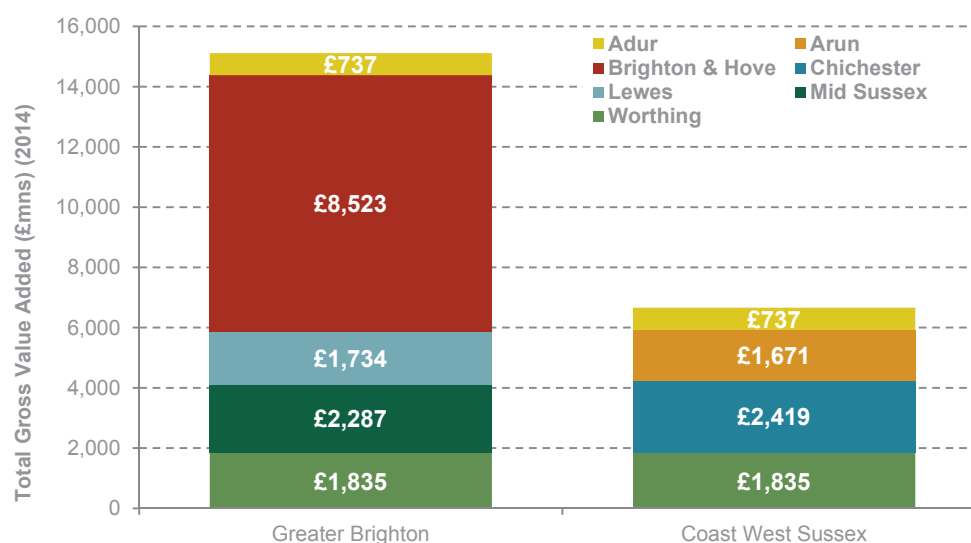
Source: Arun, Adur, Brighton & Hove, Chichester and Worthing forecasts for 2011 to 2031 from the Coastal West Sussex SHMA (2012), based on March 2012 Experian data. Lewes forecasts for 2012 to 2031 from the Lewes ELR Update (2012), based on Spring 2012 Experian data. Mid Sussex forecasts for 2011 to 2031 from the Northern West Sussex EGA (2014), based on May 2013 Experian data.

Economic Output

3.14

The total economic output measured in terms of Gross Value Added (GVA) of Greater Brighton and Coastal West Sussex in 2014 was £19.2 billion. As Figure 3.8 illustrates, the total output of Greater Brighton was £15.1bn, of which Brighton & Hove accounted for 55%. The total economic output for Coastal West Sussex was £6.7bn, of which 35% was generated by Chichester.

Figure 3.8 Total Gross Value Added by Local Authority ('000s), 2014

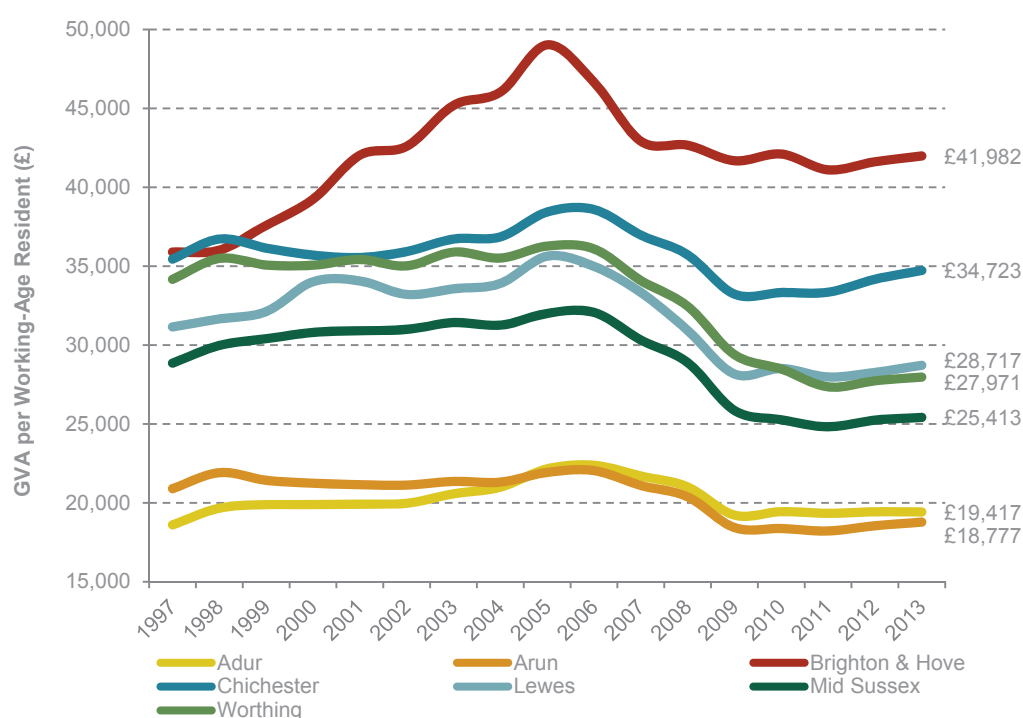


Source: Experian/NLP analysis

3.15 A related measure is the productivity of the economy, expressed as the amount of Gross Value Added generated per working-age resident as shown in Figure 3.9. This reveals a general trend of declining productivity since the recession which is in line with national trends.

3.16 Brighton & Hove has the highest GVA levels per worker and was on sharp upward trajectory until 2006/07, having been at a similar level to Chichester until 1999. Chichester has the second highest levels of output per worker, although in overall terms has not grown significantly since 1997. Lewes, Mid Sussex and Worthing all have similar levels of output, and all have declined over recent years. Adur and Arun have the lowest levels of output per worker and have followed a similar trend.

Figure 3.9 Gross Value Added per Working-Age Resident, 2014



Source: Experian/NLP analysis

Sectoral Composition

3.17 The Greater Brighton and Coastal West Sussex economy is recognised as supporting a diverse business base across a wide range of sector activities, with strong prospects to generate high levels of growth in the future.⁶

3.18 Table 3.2 overleaf provides an overview of the past and future projected growth levels for individual sectors for each local authority in terms of positive (green) or negative (red) growth or broadly no change (orange). In line with the overall employment growth trends and forecasts noted above, it is clear that Brighton & Hove and Chichester have the greatest share of sectors which have

⁶ CWS & GB Strategic Planning Board, CWS & GB Local Strategic Statement, October 2013

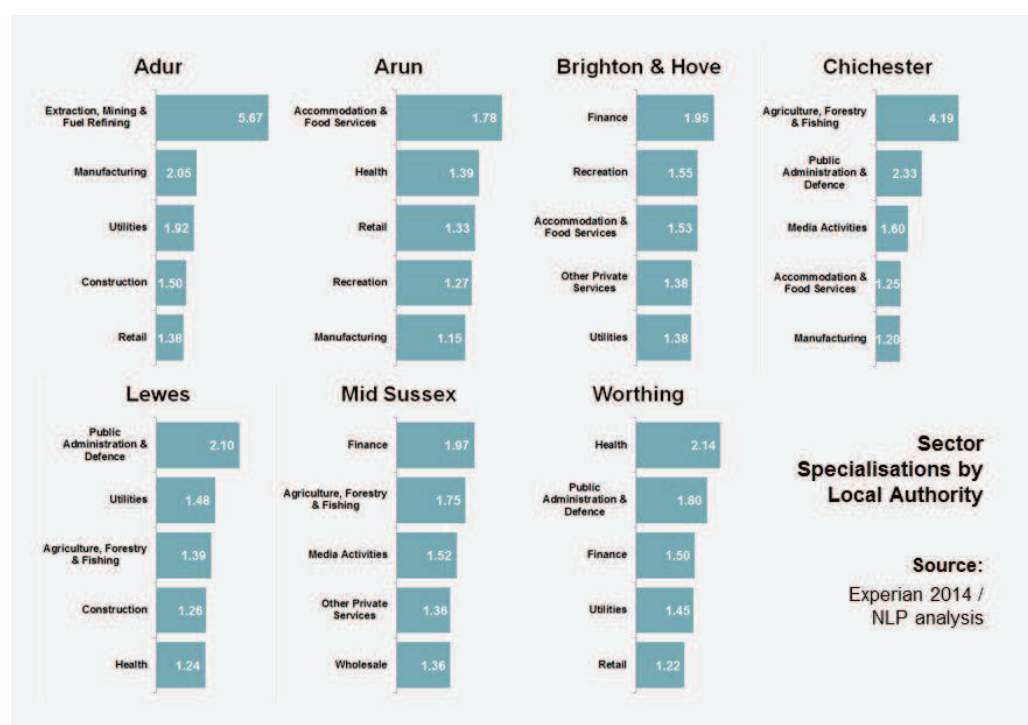
recorded past growth and also have identified future growth potential. In Adur and Arun there have been less significant fluctuations within individual sectors with many recording only limited change, whilst Mid Sussex and Worthing have the highest concentrations of declining sectors.

- 3.19 Some overarching trends can also be identified across individual sectors, for example manufacturing has declined and is forecast to decline further across GBCWS apart from Chichester. The growth of some sectors such as computing/IT and media activities is almost exclusively confined to the urban centres of Brighton & Hove and Chichester. The future outlook for employment growth in public services is limited in all locations.

Sector specialisation

- 3.20 Figure 3.10 shows how the sectoral composition of the each economy in the area differs with reference to the top five sectors.

Figure 3.10 Employment Location Quotients for Top 5 Sectors by Local Authority, 2014



Source: Experian/NLP analysis

- 3.21 This indicates specialisation in some higher value 'wealth-generating' sectors such as finance, private sector services and media, mainly limited to Brighton & Hove, Chichester, Mid Sussex and Worthing. Traditional industries such as agriculture, manufacturing, construction and extractive industries and utilities are also prevalent, notably in Adur, Lewes and Worthing. Beyond this, consumption-related local services such as public administration, health and retail also feature, particularly in Arun and Worthing. Accommodation and food services is over-represented in Arun, Brighton & Hove and Chichester linked to the visitor economy and the presence of the South Downs National Park.

Table 3.2 Historic and Forecast Employment Growth Levels by Sector, 1997-2031

	Adur		Arun		Brighton & Hove		Chichester		Lewes		Mid Sussex		Worthing	
	Past	Future	Past	Future	Past	Future	Past	Future	Past	Future	Past	Future	Past	Future
Administrative Services	▲	—	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲
Agriculture & Forestry	—	—	▲	▲	▲	▲	▲	—	▲	—	▲	▲	—	—
Computing & IT Services	—	—	—	—	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲
Construction	▲	▲	▲	▲	▲	▲	▲	—	▲	▲	▲	▲	▲	—
Education	—	—	▲	▲	▲	—	—	—	▲	▲	▲	▲	▲	▲
Finance & Insurance	—	▲	—	—	▲	▲	▲	—	—	—	▲	—	▲	▲
Health	▲	—	—	—	▲	▲	▲	—	▲	—	▲	—	▲	▲
Hospitality & Recreation	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	—	▲
Manufacturing	▲	—	▲	▲	▲	▲	—	—	▲	▲	▲	▲	▲	▲
Media Activities	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Other Private Services	▲	—	—	—	—	—	—	—	—	—	—	—	—	—
Professional Services	▲	▲	▲	—	▲	—	—	—	▲	—	—	—	▲	—
Public Services & Defence	—	—	—	—	—	—	—	—	▲	—	—	—	—	—
Real Estate	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Residential & Social Care	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Retail	▲	—	▲	▲	▲	▲	▲	—	▲	—	▲	—	▲	—
Telecoms	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Wholesale & Transport	—	—	▲	—	—	—	—	—	▲	—	—	—	—	—

Source: Experian/NLP analysis

Note: Green = growth of more than 300 jobs, Red = decline of more than 300 jobs, Orange = change of less than 300 jobs

Summary

- 3.22 Greater Brighton and Coastal West Sussex is a significant economic entity, comprising 50% of jobs in the Coast to Capital LEP area and which supports comparable levels of employment to the Gatwick Diamond and Oxford City Region.
- 3.23 Within the area, there is a clear spatial concentration of economic activity within a small number of locations – notably Brighton & Hove which is twice the size of the second largest economy, Chichester. Greater Brighton also accounts for the largest share of economic output, of which Brighton & Hove alone contributes over half. The implication is that jobs and growth are currently focused on a relatively small part of the overall land area of GBCWS.
- 3.24 There has been significant employment growth within the area, largely driven by Brighton & Hove, Chichester and – to a lesser extent – Adur. Growth in the other authorities has been considerably less, and in overall terms the Mid Sussex economy has grown by less than 1% since 1997. The effect over time is that the share of total jobs within GBCWS concentrated in the urban centres of Brighton & Hove and Chichester has increased.
- 3.25 Looking ahead, employment forecasts indicate potential for 57,000 new jobs by 2031 across GBCWS, which in line with past trends will be mainly focused in Brighton & Hove and Chichester although all areas are expected to register net job gains. Some of this job growth will be driven by population growth and the demand for consumption-related activities and services that flow from this, so a relevant consideration to achieving these forecasts is the extent to which future increases in population can be accommodated.
- 3.26 The overall growth trends within GBCWS reflect the underlying economic fabric of the area in terms of the distribution of sectors. Brighton & Hove and Chichester have the greatest share of sectors which have recorded past growth and have identified future growth potential, notably in financial and business services, media and technology sectors. In Adur and Arun most sectors have been relatively stable, but overall there has been limited growth and some sectors (e.g. manufacturing) are forecast to decline. Mid Sussex and Worthing currently have the highest concentrations of sectors with forecast employment declines, notably administrative support services.
- 3.27 At the present time, specialisation in higher value ‘wealth-generating’ sectors such as finance, private sector services and media, appears to be mainly confined to Brighton & Hove, Chichester, Mid Sussex and Worthing, whilst outside of these areas there is more reliance on consumption-related local services such as public administration, health and retail which generally produce lower levels of economic output. This position, of course, does not preclude the potential for new sectoral strengths to be established. As might be expected in this location, visitor economy and rural sectors are also over-represented.

4.0

Access to Labour Force

This section explores the current labour force within Greater Brighton and Coastal West Sussex particularly how this relates to commuting flows within and outside of the area and relative skills levels in different locations.

Local Labour Force

4.1

The resident labour force in Greater Brighton and Coastal West Sussex is characterised by strong economic activity rates and low unemployment levels compared to the South East average. Table 4.1 shows that Arun, Chichester and Adur support the most economically active labour force, while Worthing, Lewes and Brighton & Hove display lower economic activity rates. In addition, Coastal West Sussex displays a lower overall unemployment level compared to Greater Brighton, with the higher unemployment rate in Brighton & Hove skewing the overall unemployment rate in the area.

Table 4.1 Summary of Key Labour Force Indicators by Local Authority in GBCWS

	Adur	Arun	Brighton & Hove	Chichester	Lewes	Mid Sussex	Worthing	Greater Brighton Average	Coastal West Sussex Average
Economic Activity Rate	84.5%	85.9%	79.8%	84.8%	79.7%	82.8%	73.1%	80.4%	82.2%
Unemployment Rate	5.0%	4.2%	6.2%	3.8%	5.0%	2.8%	5.5%	5.2%	4.5%
% Higher Skilled Occupations	36.4%	42.0%	61.0%	50.6%	53.2%	54.1%	48.9%	54.7%	45.2%

Source: NOMIS / Experian 2014 / NLP analysis

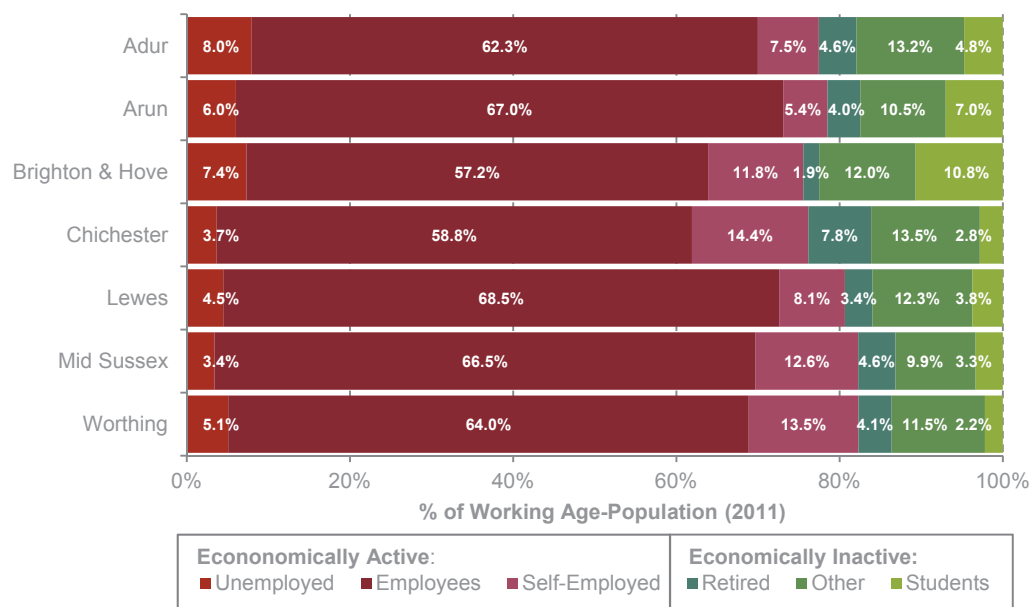
4.2

However the lower economic activity rate in Brighton & Hove partly reflects its significant student population, which as Figure 4.1 overleaf indicates represents around 10% of the local working-age population. While this group is considered to be economically inactive, in reality, they represent a potentially important driver to future growth in the economy, as they provide a key source of higher skilled workers to businesses if they can be retained locally. Arun also accommodates a high share of students, with 7% of the working-age population categorised in this group.

4.3

The breakdown of economically active and inactive working-age persons also highlights the fact that Chichester accommodates almost double the share of retired persons (i.e. early retirees under the age of 64) compared to any other authority in GBCWS, while Brighton & Hove supports a much smaller proportion of early retirees. In terms of employees and self-employed persons, Mid Sussex, Worthing and Lewes accommodate the highest share in GBCWS, while Brighton & Hove and Adur display the lowest proportion (Figure 4.1).

Figure 4.1 Breakdown of Economically Active and Inactive Working-Age Persons by Local Authority, 2011



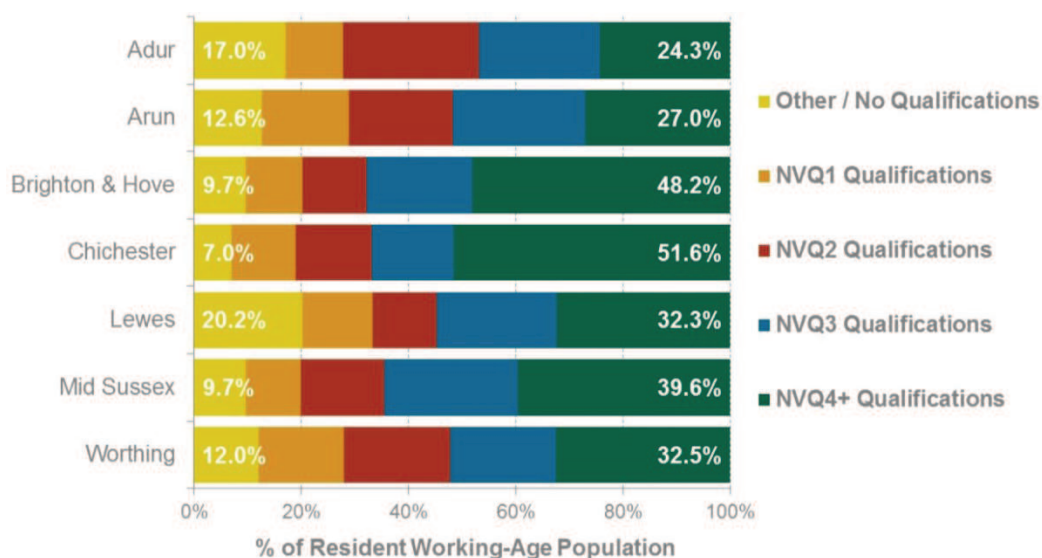
Source: ONS NOMIS / NLP analysis

Note: The 'other' economically inactive group includes persons looking after their family or home, temporary or long-term sick, and other persons discouraged to seek employment.

4.4

Table 4.1 also indicates a large share of the labour force in Greater Brighton and Coastal West Sussex are employed in higher skilled roles compared to the national average, although Coastal West Sussex does fall below the regional average. Brighton & Hove has the largest share of workers employed in higher skilled occupations, while Adur has the smallest share by a significant margin. In addition, Figure 4.2 shows that Brighton & Hove and Chichester support the most qualified working-age population in GBCWS while Lewes and Adur have the largest share of working-age persons that have attained no qualification or other types of qualifications.

Figure 4.2 Breakdown of Qualification Attainment by Local Authority, 2014

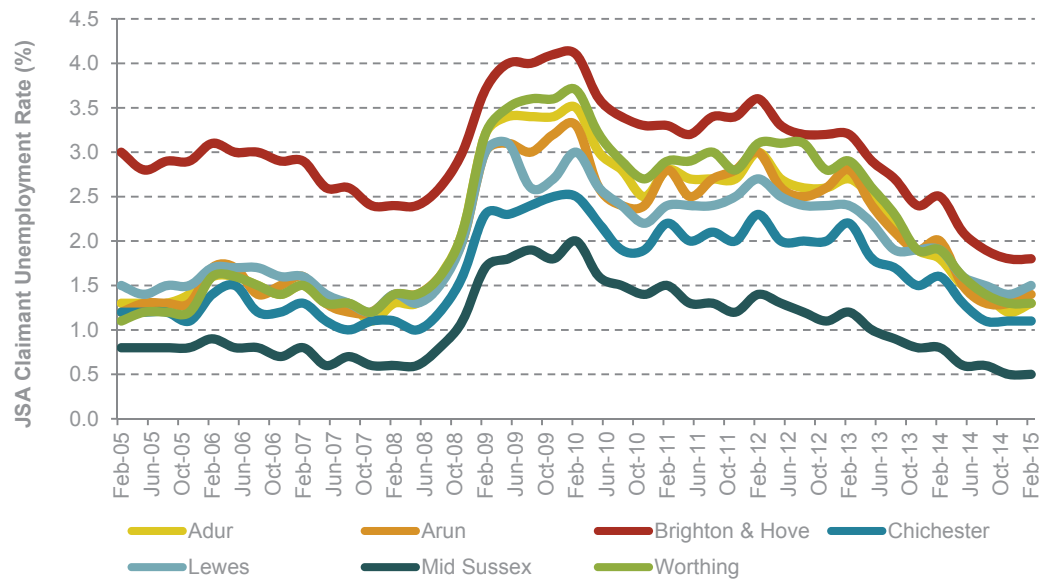


Source: ONS NOMIS / NLP analysis

4.5

Historic trends in unemployment levels in GBCWS can also be considered in terms of Job Seekers Allowance (JSA) claimants. Figure 4.3 illustrates that Brighton & Hove has historically displayed the highest level of JSA claimant levels, but since 2008 has closed the gap with most of the other authorities in the area, which may reflect the economic recession having a greater impact on other local economies. In February 2015, the majority of the authorities in GBCWS had a JSA claimant rate between 1.1% and 1.5%, while Mid Sussex continued to record much lower JSA claimant rates in comparison.

Figure 4.3 Change in JSA Claimant Levels by Local Authority, 2005 - 2015



Source: ONS NOMIS / NLP analysis

4.6

Overall the resident labour force in Greater Brighton and Coastal West Sussex is characterised by strong economic activity rates, low unemployment levels, and relatively higher skilled workers compared with regional and national rates. In particular, the local labour force in Brighton & Hove and Chichester support a large share of higher skilled workers. However parts of Coastal West Sussex (i.e. Arun and Adur) do show some current deficiency in terms of the skill levels of their labour force which may impact the ability of local population to access higher value jobs and/or the relative attractiveness of these locations for growth sectors.

Internal Commuting Flows

4.7

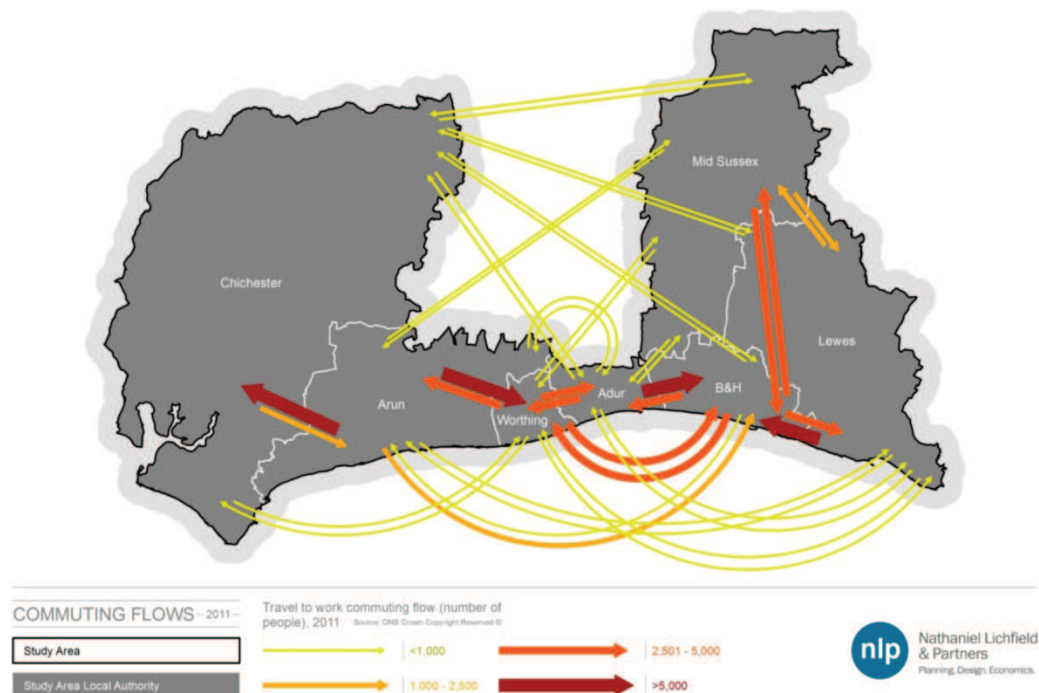
The internal commuting patterns in GBCWS will be primarily influenced by the spatial connections between different parts of the area, as well any mismatch between demand and supply for employment in an economy, which could drive workers to seek employment opportunities outside the local area.

4.8

Drawing upon 2011 Census data, the most significant internal commuting flows are identified as involving Brighton & Hove, which represents the largest and most diverse employment base in GBCWS. Figure 4.4 shows Brighton & Hove attracts a large volume of commuting workers from the surrounding authorities

of Adur, Lewes, Mid Sussex and Worthing, which help to support the labour supply requirements of businesses in Brighton & Hove. Other major commuting flows are from Arun to Chichester and Arun to Worthing, while there are notably limited commuting journeys between Brighton & Hove and Chichester which is likely to be due to the relative distance and journey times (by both road and rail) between the two areas.

Figure 4.4 Internal Commuting Flows in GBCWS, 2011

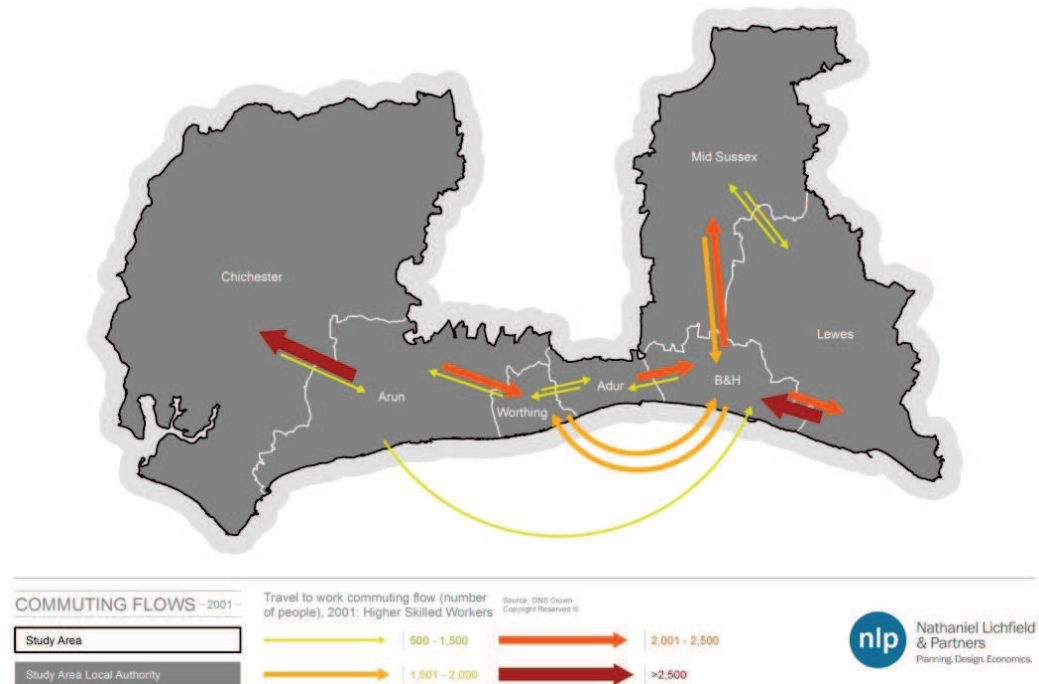


Source: Census 2011 / NLP analysis

4.9

A key factor that influences the internal commuting relationships in GBCWS is the movement of higher skilled workers, which have more incentive to travel outside their local area to gain suitable employment roles. As shown in Figure 4.5, the higher value industries supported in Brighton & Hove and Chichester correlate with a large volume of higher skilled workers commuting into these authorities for their employment from surrounding areas.

Figure 4.5 Internal Commuting Flows of Higher Skilled Workers in GBCWS, 2001*



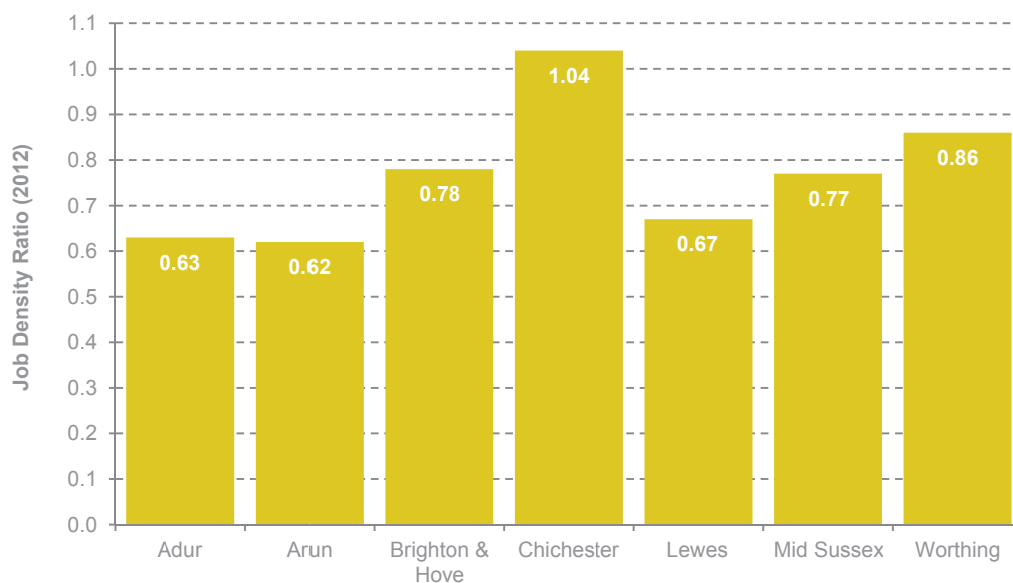
Source: Census 2001 / NLP analysis

* Note: 2011 Census commuting data by occupation group has not yet been released

Levels of Self-Containment

- 4.10 While a number of factors will play a role in influencing the commuting trends in Greater Brighton and Coastal West Sussex, one factor relates to the imbalance between the demand and supply of employment in an economy. In essence, if the number and types of jobs within a particular area do not match those demanded by local persons; resident workers will seek other roles outside the local area which will ultimately increase commuting flows. However, the reality of a functioning labour market is that there will always be some degree of commuting.
- 4.11 In this context a useful analysis is to consider the number of jobs supported in an economy per working-age person, in order to determine the extent to which there is a local supply of jobs to meet demand from workers (albeit based on administrative boundaries which do not necessarily correlate to functional labour markets). Figure 4.6 illustrates that Chichester (i.e. which has more than 1 job per working-age person), Worthing and Brighton & Hove have the highest job density ratios, while Arun, Adur and Lewes have the lowest ratios.

Figure 4.6 Job Density Ratios by Local Authority, 2012

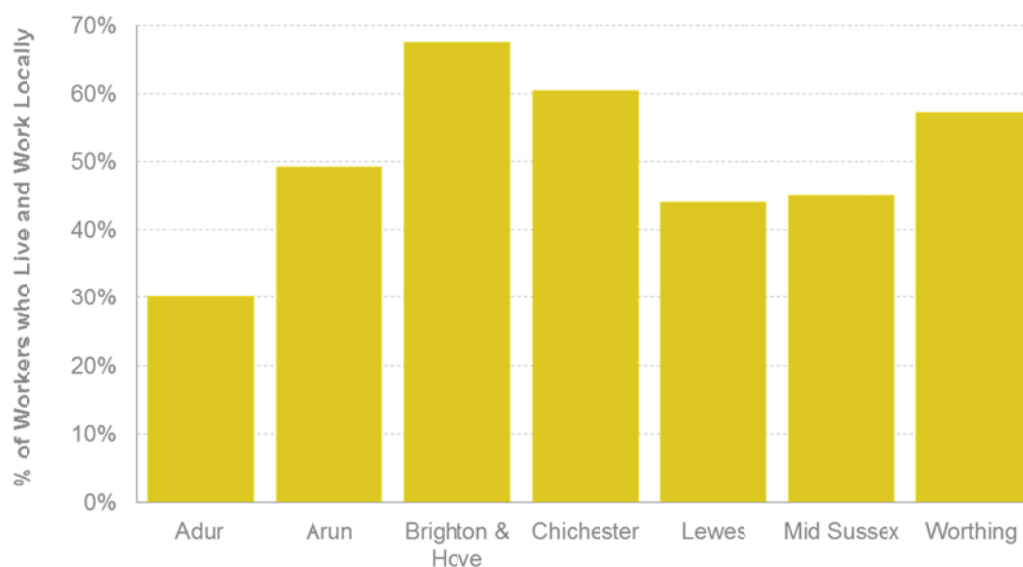


Source: ONS NOMIS / NLP analysis

4.12 The rate of self-containment relates to the share of workers who both live and work in the same local authority. Generally, larger local economies display higher self-containment rates as they can support a more diverse employment base that can meet the needs of a wider range of local workers. This is evident in GBCWS where both Brighton & Hove and Chichester display self-containment levels in excess of 60%, while it is also notable that Worthing has a self-containment rate greater than 50% given its smaller scale (Figure 4.7).

4.13 By contrast, the local authority areas of Adur, Lewes and Mid Sussex display the lowest self-containment rates in GBCWS, suggesting a higher proportion of their working residents travelled to other authority areas for their employment.

Figure 4.7 Self-Containment Levels by Local Authority in Greater Brighton and Coastal West Sussex, 2011



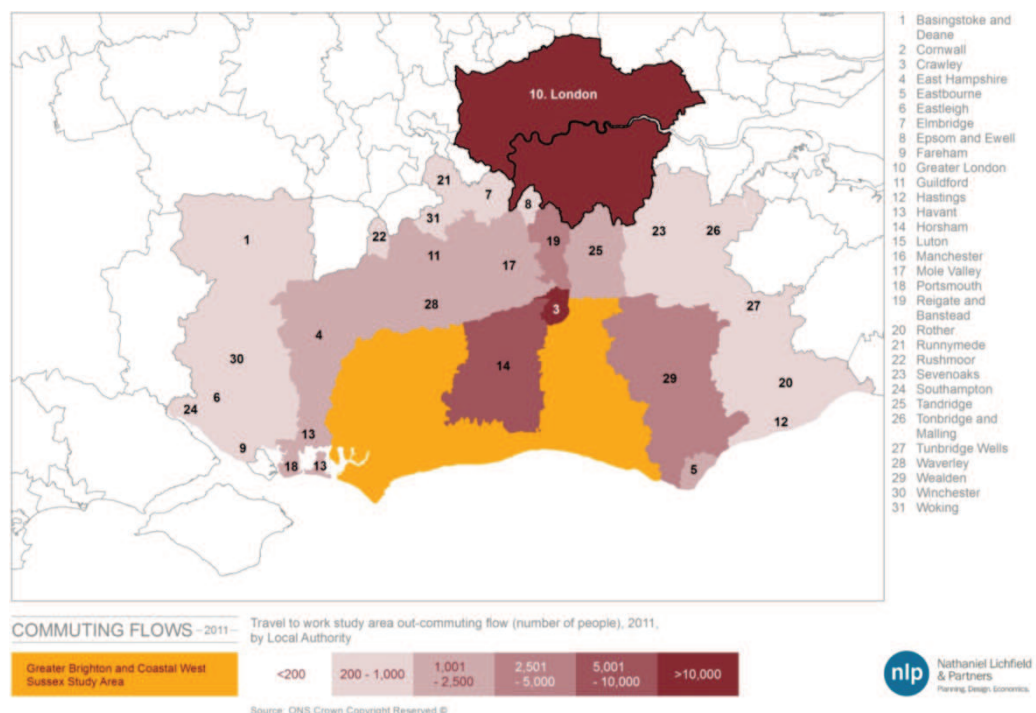
Source: Census 2011 / NLP analysis

- 4.14 The three local authorities that display the highest job density ratio also have the highest self-containment rates, which underlines the range of jobs available. The reverse trend is also evident in Adur and Lewes where the lower job density ratios also correspond with lower self-containment rates. However it should be noted that job density ratios are only one factor influencing commuting patterns, as shown by Arun that displays the lowest job density ratio in GBCWS but still has relatively high self-containment levels.
- 4.15 Overall, the level of self-containment within Greater Brighton and Coastal West Sussex equates to around 75%, meaning only 25% of local workers commute outside the area for employment. The self-containment rate in Greater Brighton is also estimated at around 73%, while the level of self-containment in Coastal West Sussex is slightly lower at approximately 71%.

External Commuting Flows

- 4.16 While the strongest flow of workers is generally undertaken between the local authorities forming GBCWS (i.e. evidenced by high self-containment rates), the commuting flow of workers in and out of GBCWS is also relatively significant. Drawing on 2011 Census data, it is possible to investigate commuting patterns relating to the volume of workers entering and exiting GBCWS for employment.
- 4.17 About 86,660 workers or 25% of the total living in GBCWS commuted outside the area for their employment in 2011. The most significant outflow of workers were to Greater London and Crawley, which accounted for nearly half of all out-commuting workers, while Horsham and Wealden were also relatively popular commuting destinations (Figure 4.8).

Figure 4.8 Out-Commuting Flows from Greater Brighton and Coastal West Sussex, 2011

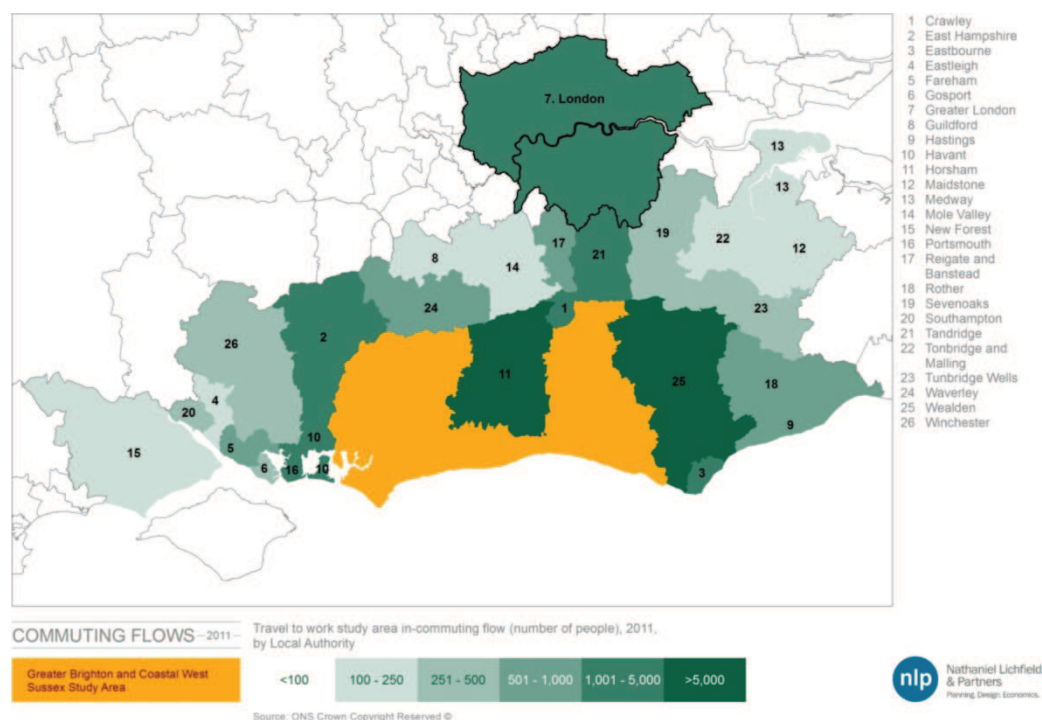


Source: Census 2011 / NLP analysis

4.18

At the same time a large flow of workers travelled to GBCWS for employment in 2011. These flows totalled 46,750 workers, equivalent to 15% of workplace jobs in the GBCWS. The largest inflow of workers came from the adjoining authorities of Horsham and Wealden. However in contrast to the concentrated outflow of workers to Greater London and Crawley, the inflow of workers into GBCWS came from a more widespread area across the surrounding region (Figure 4.9). This points towards the significance of Greater Brighton and Coastal West Sussex in offering a broad employment base that is attractive to a wide labour catchment market, especially Brighton & Hove and Chichester.

Figure 4.9 In-Commuting Flows to the City Region, 2011



Source: Census 2011 / NLP analysis

4.19

On balance, GBCWS can be characterised as a net exporter of labour with a large net outflow of around 39,900 workers.⁷ However the significant outflow of workers from the area should also be considered in the context of an overall self-containment rate of 75% (see description of self-containment rates above), which indicates the majority of workers live and work locally within GBCWS.

4.20

However an important feature of the commuting patterns for GBCWS is that it is a significant net exporter of higher skilled workers out of the region, with a net outflow of around 27,210 higher skilled workers in 2011. This outflow equated to around 30% of all higher skilled workers residing in GBCWS, with Greater London drawing the highest proportion of higher skilled workers from GBCWS (i.e. supporting the employment requirements of around 10% of higher skilled residing in GBCWS).

⁷ The net outflow of workers from the GBCWS economy is based on 86,660 resident workers travelling outside the area for their employment, and 46,750 workers travelling into the area for their employment.

- 4.21 By contrast only around 13% of all lower skilled workers residing in GBCWS commuted outside the area for employment in 2011, including just 1% of lower skilled workers commuting to Greater London. The more localised commuting patterns for lower skilled workers reflects the reduced capability and incentives of these workers to incur high travel costs to access employment opportunities outside their local economy.

Summary

- 4.22 The resident labour force supporting the business base in GBCWS is largely characterised by strong economic activity rates and low unemployment trends when compared with regional and national levels (i.e. with Worthing being the main exception in terms of economic activity). While Coastal West Sussex displays slightly higher economic activity rates, this is in part due to the lower economic activity rate in Brighton & Hove, which is influenced by its sizeable student population.
- 4.23 The workforce skills profile in Greater Brighton and Coastal West Sussex is also relatively strong. A large share of the resident labour force is employed in higher skilled roles, with Brighton & Hove, Lewes and Chichester supporting the largest proportions. In contrast, Adur and Arun have the lowest proportion of workers in higher skilled roles, which also correspond to these authorities having the lowest NVQ4 and above qualification attainment. These factors suggest parts of Coastal West Sussex have a current deficiency in labour skill levels.
- 4.24 Given the fact that higher skilled workers are more likely to commute outside their local economy to find appropriate employment, it is not surprising that Brighton & Hove and Chichester attract the largest flows of workers from the surrounding authorities in GBCWS. These local economies provide the largest and most diverse employment base to workers in the area, and therefore draw a significant share of higher skilled workers from surrounding local authorities. These commuting workers help to support the labour supply requirements of these larger economies in GBCWS.
- 4.25 In addition to this, Chichester and Brighton & Hove, alongside Worthing, have the highest self-containment levels (i.e. relating to the share of workers who both live and work in the same local authority) within GBCWS, whilst Arun and Lewes have the lowest self-containment levels. These respective self-containment levels reflect the job density ratio (i.e. number of workforce jobs provided per working-age person) in each authority, with Chichester, Brighton & Hove and Worthing providing enough jobs to reduce the share of local workers that need to commute outside the area for their employment.
- 4.26 Overall, the self-containment level in GBCWS equates to around 75%, which means around 25% of resident workers commute outside the area for work. In addition, Greater Brighton has a self-containment level of 73% and Coastal West Sussex has a self-containment level of 71%.

4.27

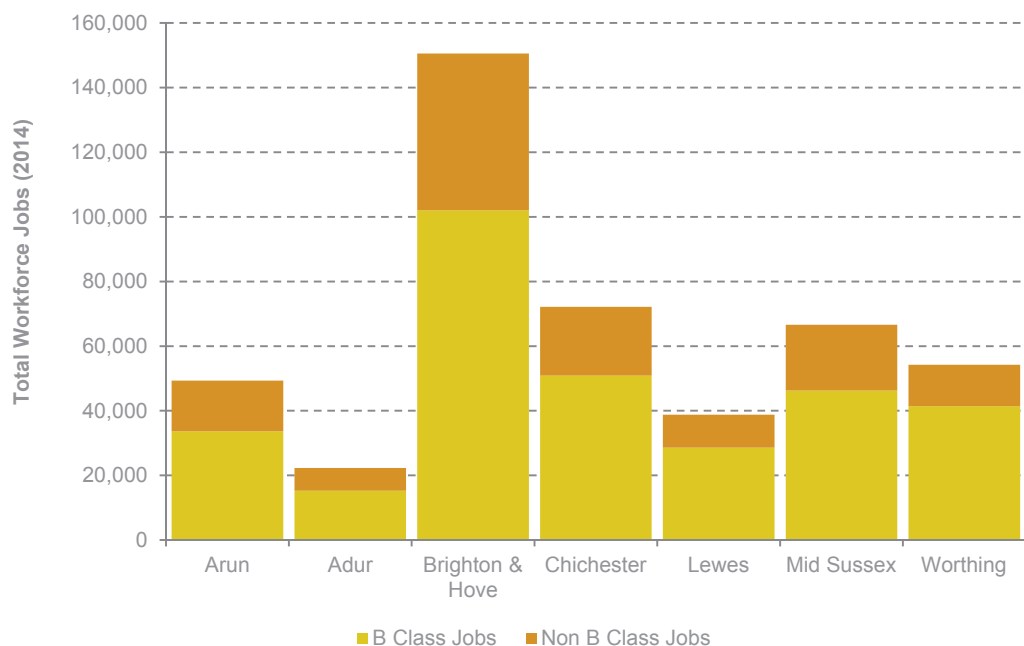
An important commuting pattern for GBCWS also relates to the area being a large net exporter of labour, with a net outflow of approximately 39,000 workers in 2011. While this pattern should be considered in the context of its high self-containment levels, the retention or attraction of a higher number of workers to the area would increase the available labour supply and provide better support to local businesses. In particular, GBCWS should seek to retain a higher share of its higher skilled workers, with around 30% of all higher skilled workers in the area commuting outside the area for employment.

Provision of Employment Space

This section considers the capacity for growth, both in terms of the existing profile of employment space within Greater Brighton and Coastal West Sussex and additional provision planned within the area.

- 5.1 The analysis below reviews the supply of office, industrial and warehousing space across GBCWS, which are defined as 'B-class' uses in planning terms. There are however other sources of employment in the economy which do not typically occupy B-class space, for example retail, health and education.
- 5.2 The split of employment between B class and non B class sectors in GBCWS indicates approximately 70% of jobs are in B class sectors (i.e. sector activities undertaken in office (B1a/b), industrial (B1c/B2) and warehousing (B8) space) and 30% are in non B class sectors. This employment split is also evident in Greater Brighton and Coastal West Sussex respectively, although there is a slightly higher share of B-class jobs in Coastal West Sussex.
- 5.3 In proportionate terms, Worthing (76%) and Lewes (74%) support the highest share of their total jobs in B class sector activities, indicating a tendency towards office and industrial-based employment in the economy. In contrast, Brighton & Hove has the smallest proportion of their total jobs accommodated in B class sector activities, with approximately 32% of jobs classified as non B class jobs. This reflects the significant number of workforce jobs in Brighton & Hove that are supported in hospitality, recreation, retail, education, health and public services, which are all largely categorised as non B class sectors.

Figure 5.1 Breakdown of B Class and Non B Class Jobs by Local Authority, 2014

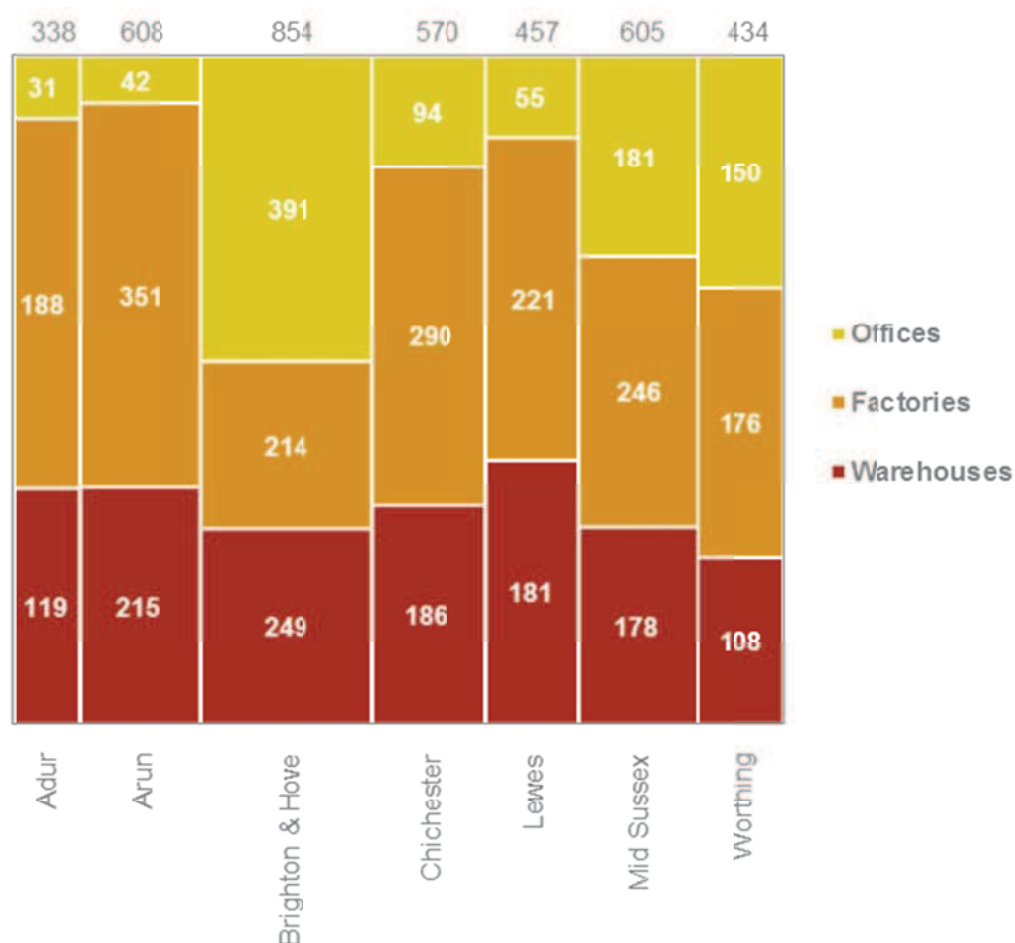


Source: Experian / NLP analysis

Existing Supply of Employment Space

- 5.4 In 2012, around 3,817,000sq.m of B class employment floorspace (i.e. offices, factories and warehouses) existed in GBCWS. The largest stock of space was in Brighton & Hove, which accounted for around 22% of total space in the area, followed by Mid Sussex (16%), Chichester (15%) and Arun (15%).
- 5.5 Based on 2008 VOA data, Brighton & Hove is by far the largest office centre in GBCWS with over 40% of the total stock of office accommodation, while Mid Sussex and Worthing are the next largest office centres in terms of space. (Figure 5.2). This highlights the fact Greater Brighton accounts for around 85% of the area's office space, and the comparatively minor role of Coastal West Sussex in office market terms (i.e. even in terms of Chichester).

Figure 5.2 Profile of Employment Floorspace by Local Authority, 2008



Source: Valuation Office Agency/NLP analysis Note: employment floorspace figures are shown in 000s

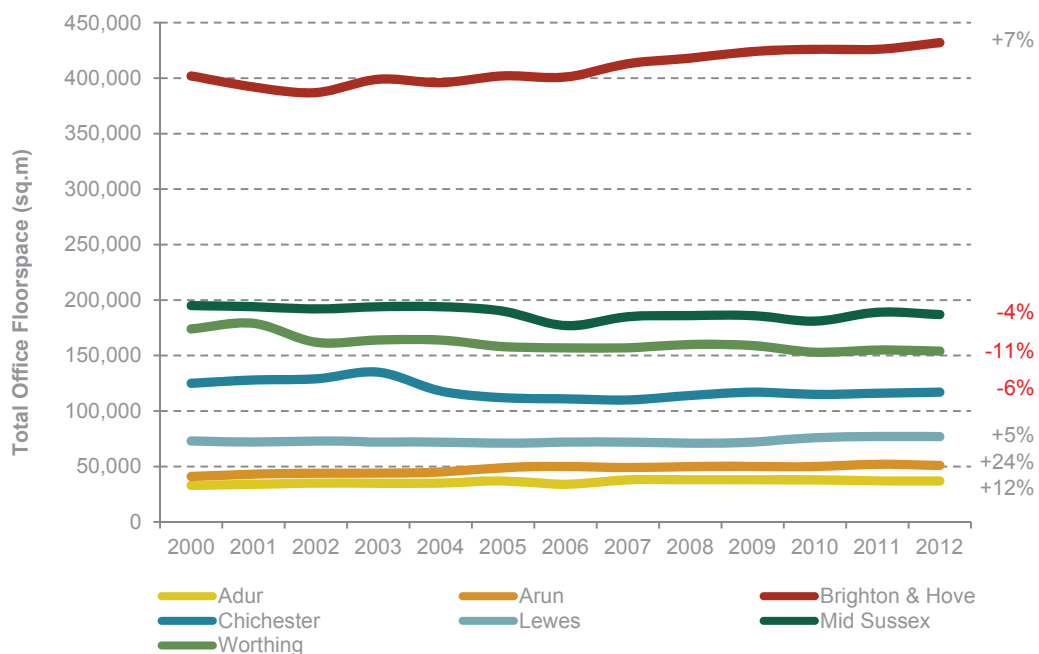
- 5.6 By contrast, Greater Brighton accounts for about 65% of the area's total supply of factory and warehousing (i.e. industrial) space. The largest stock of industrial space is within Arun and Chichester, both within Coastal West Sussex; together these areas account for over a third of the area's total stock of industrial space.

Changes in Stock of Space

5.7

Examining recent trends in the total stock of office space by local authority in GBCWS indicates that Brighton & Hove has seen the largest absolute growth in stock between 2000 and 2012, with 30,000sq.m (7.5%) of additional space developed over this period. Growth in office space in Arun (10,000sq.m), Adur (4,000sq.m) and Lewes (4,000sq.m) was also relatively strong over this period, although the scale of the total office stock in these authorities is considerably smaller in comparison to Brighton & Hove. Office accommodation in Chichester, Mid Sussex and Worthing has all declined since 2000 (Figure 5.3). This data does not include the period since 2013 when Permitted Development Rights for offices to residential were introduced, and therefore the rate of office space losses may have increased.

Figure 5.3 Change in Office Floorspace by Local Authority, 2000 - 2012

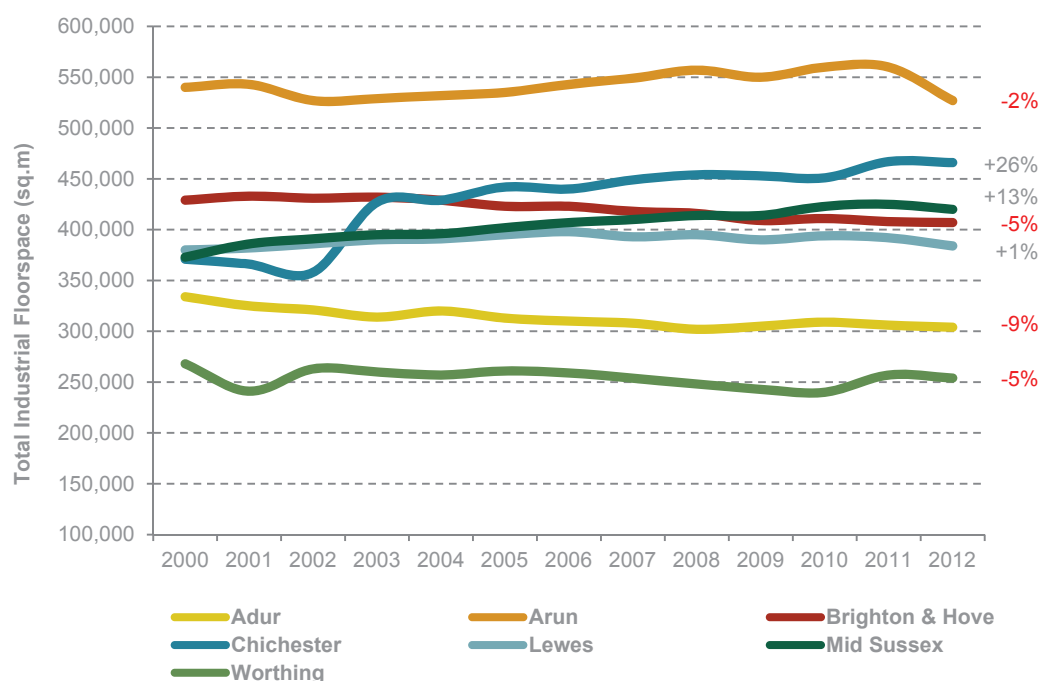


Source: Valuation Office Agency/NLP analysis

5.8

Figure 5.4 illustrates the change in industrial space in each of the authorities between 2000 and 2012. The most significant increase in industrial space during this period was in Chichester, where an additional 95,000sq.m, or (26%), of industrial space was developed. This was around double the amount of industrial space developed in any other local authority in GBCWS during this period, with Mid Sussex increasing its stock by around 47,000sq.m, or (13%). In contrast, most of the other authorities in the area recorded industrial space losses over this period, including in Adur, Arun, Brighton & Hove and Worthing, while Lewes did not see much change in its level of industrial stock.

Figure 5.4 Change in Industrial Floorspace by Local Authority, 2000 - 2012



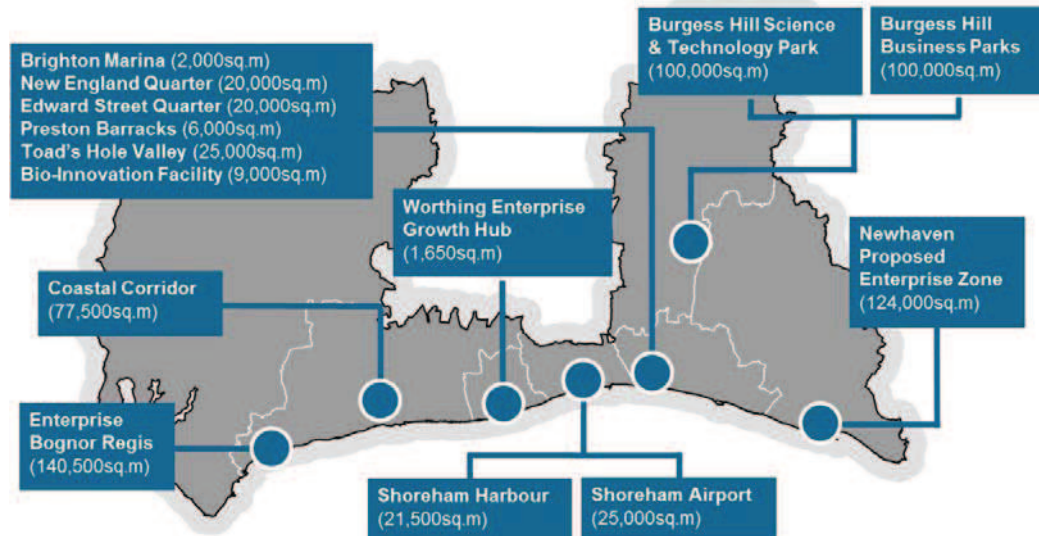
Source: Valuation Office Agency / NLP analysis

Planned Employment Land Supply

5.9 The Coast to Capital LEP Strategic Economic Plan (SEP) (2014) identifies a number of strategic employment sites across Greater Brighton and Coastal West Sussex that will be the principal focus for employment development within the area. It should be noted that these strategic sites do not comprise the entire potential supply of employment land within GBCWS.

5.10 They are not homogeneous in nature and include a mix of strategic corridors and areas, city areas, strategic sites or locations, and a proposed Enterprise Zone (at Newhaven). These sites are identified as having capacity for about 670,000sq.m of employment space across Greater Brighton and Coastal West Sussex. While the identified strategic sites do comprise a small number of smaller sites, such as Worthing Growth Hub (1,650sq.m) and Brighton Marina (2,000sq.m), the majority of the sites will provide employment space in excess of 100,000sq.m (Figure 5.3).

Figure 5.5 Strategic Employment Sites in GBCWS



Source: Coast to Capital LEP SEP (2014) / NLP analysis

- 5.11 It is notable that the majority of the strategic sites identified as important growth locations within Greater Brighton and Coastal West Sussex are also located outside the primary areas of existing economic activity, with the exception being the strategic sites proposed to come forward in Brighton & Hove. The majority of the strategic sites are located within periphery areas to these main economic areas, such as Shoreham in Adur and Bognor Regis in Arun, which could be a consequence of a scarcity of available land for strategic developments in existing areas of economic activity.
- 5.12 In any case, the development of strategic employment sites across the area will provide opportunities for employment growth to be more evenly spread across the sub-regional economy, and offer a range of local economies the opportunity to accommodate and cultivate their local business base and sector advantages. With this in mind, the timing of delivery and type of employment space developed at each of the strategic sites need to meet local business requirements to have the greatest impact.
- 5.13 In reviewing the pipeline of employment space within Greater Brighton and Coastal West Sussex it is apparent that there is a 'missing middle' in the supply of employment land, with sites either supporting relatively small-scale space or large strategic space. In order for the area to retain businesses within the area, it will be important to ensure that suitable employment space is provided that would support the growth needs of small-to-medium sized businesses that have outgrown small commercial units, but do not require large-scale strategic sites to support their space needs.

Summary

- 5.14 Latest available data indicates that in 2012 there was about 3.8 million sq.m of office, industrial and warehousing space within GBCWS. The largest stock of

space is within Brighton & Hove which accounts for about 22% of the total, followed by Mid Sussex (16%), Chichester (15%) and Arun (15%).

- 5.15 Brighton & Hove is the largest office centre, comprising 40% of the total stock within GBCWS. This stock has expanded by about 7% over the past decade; Adur and Arun has seen proportionately greater increases but from a much lower base. Chichester, Worthing and Mid Sussex have all lost office space in net terms.
- 5.16 The position for industrial space has been more mixed, with only Chichester and Mid Sussex recording significant net gains in overall stock. In most other locations there have been declines or very limited change.
- 5.17 Plans within GBCWS propose new strategic allocations with capacity for in the order of 670,000 sq.m. The majority of the strategic sites are located within periphery areas to the main established economic areas, such as Shoreham in Adur and Bognor Regis in Arun, which could be a consequence of a scarcity of available land for strategic developments in existing areas of economic activity. However, it is apparent that there is a 'missing middle' in the supply of employment land, with sites either supporting relatively small-scale space or large strategic space.

6.0

Future Opportunities and Actions

This section draws together the implications from the preceding analysis to identify future opportunities and actions in support of promoting long-term sustainable growth across Greater Brighton and Coastal West Sussex with particular reference to the economy.

Meeting Growth Needs

6.1 From the preceding analysis, it is clear that the focus of most economic activity (in terms of employment, economic output and productivity) is very firmly concentrated in Brighton & Hove, and to a lesser extent Chichester. This is particularly indicative of the success of the Brighton & Hove economy which has grown significantly over the past decade across a wide range of sectors, but notably advanced service sectors such as finance, digital and media. The City can be very much regarded as the 'powerhouse' of the area's economy.

6.2 The corollary of this trend is that other parts of Greater Brighton, and particularly Coastal West Sussex, have seen much slower rates of growth and in some cases do not exhibit the broad mix of sectors that can sustain higher levels of jobs and economic output growth. There remains greater representation in more traditional sectors such as manufacturing and agriculture/horticulture, and public services and consumption-related activities play a greater role. Consequently, and aside from Chichester, the growth potential of these areas is less strong and the value of economic output is lower. That is not to say that some individual sector growth opportunities do not exist (and may be worthy of future investment), but rather that they are more limited at the present time.

6.3 However, given the physical constraints and congestion issues faced by Brighton & Hove, a strategy which seeks to more widely distribute economic growth across the Greater Brighton and Coastal West Sussex area would appear practical. The evidence indicates that a third of total jobs are located on just 5% of the entire land area of GBCWS. This is not to undermine the economic role of Brighton & Hove, but to ensure that growing businesses and sectors are not unduly constrained and can be retained within the area (rather than potentially relocating elsewhere). This approach would enable all locations to capitalise on leading growth sectors and to help alleviate 'overheating' within Brighton & Hove, and in turn provide the foundations for more sustainable long-term economic growth.

Towards a Polycentric Strategy

6.4 To be effective, it is important that future planning and economic strategy across GBCWS works with the grain of the market and the sector opportunities that exist both now and in the future. This requires an assessment of:

- the key strengths of different locations and the opportunities for clustering;
- the ability of different locations to support different parts of an industry value chain;
- opportunities for expansion, and balancing the needs of start-up and scale-up businesses.

6.5 Adopting a more polycentric growth strategy for GBCWS means a strategy which is framed in terms of developing a complementary offer for the area in overall terms, not just individual locations. This is likely to mean a requirement to define a 'role' for different parts of the area, and potentially accepting that some locations will be more significant drivers of the economy than others.

6.6 However, this should be underpinned by a principle of complementarity rather than competition between places. A specific recent example is the opening of the Rolls Royce facility in Bognor Regis where allocated land was made available through the Enterprise Bognor Regis initiative as an extension to the company's existing headquarter operations in Chichester – it demonstrates how the area can capture different parts of the value chain of a particular business to generate growth locally. It is these types of complementary opportunities that need to be explored further with businesses across the area, and particularly those that might otherwise seek to locate some operations elsewhere.

Raising Productivity and Economic Output

6.7 As noted in section 3.0, there productivity levels and economic output vary considerably across GBCWS. At the present time, specialisation in higher value 'wealth-generating' sectors such as finance, private sector services and media, appears to be mainly confined to Brighton & Hove, Chichester, Mid Sussex and Worthing, whilst outside of these areas there is more reliance on consumption-related local services such as public administration, health and retail which generally produce lower levels of economic output. As might be expected in this location, visitor economy and rural sectors are also over-represented.

6.8 This position, of course, does not preclude the potential for new sectoral strengths to be established and a number of specific initiatives are already in place, for example the University Technical College in Newhaven which will focus on marine and green technologies. A programme of targeted investment of this type will support the transition to higher value sectors, including by supporting existing businesses to repurpose existing assets and adopt new technologies.

6.9 A strategy to support higher growth and higher value added sectors will need to be supported by commensurate improvements to the skills profile in some locations within GBCWS if local people are to access jobs within new and emerging sectors and the benefits of these are to be felt at a local area. A

more detail assessment of skills needs will need to be considered as part of developing a more polycentric growth strategy.

Capacity for Growth

- 6.10 Meeting the space needs of key sectors and growing businesses is a recurring theme identified through the consultation as part of preparing these papers. There are ambitious plans set out within Local Plans to provide significant new employment premises, but much is profiled towards larger strategic sites on the outer edges of the area – notably in Lewes, Mid Sussex and Arun.
- 6.11 This presents two issues: the ‘missing middle’ that needs to fill the gap between the small-scale starter space provision (e.g. New England House in Brighton & Hove) and the larger strategic sites (e.g. Burgess Hill in Mid Sussex), and meeting needs that want to be located closer to the main focus of economic and business activity within Brighton & Hove and its immediate periphery. Some intermediate opportunities (e.g. Toads Hole Valley) will assist, but overall it is less clear that the current proposed employment land supply across the area is necessarily well placed to address these needs. A related issue is the extent to which the area’s success as an incubator for new businesses can be extended to ensure businesses are retained within the area as they grow and expand (and require larger premises) without being forced to relocate elsewhere potentially outside of the area.
- 6.12 This implies a requirement to consider how some existing sites can contribute to meeting short and medium-term needs before strategic sites become available, including through redevelopment and intensification. This presents an immediate opportunity for locations such as Adur, Worthing and Lewes (particularly Newhaven) which have close functional relationships with Brighton & Hove and are an obvious next ‘stepping stone’ for any businesses needing to expand outwards from Brighton & Hove but not requiring a larger site further away such as Enterprise Bognor Regis. An important element of this development is consideration of how transport can contribute to bringing Adur, Worthing and Lewes ‘closer’ to the economic centre. This may include revisiting the role of bus and rail in regional connectivity. This is particularly the case with Newhaven and Worthing where existing links are considered poor.

Promoting GBCWS as an Investment Location

- 6.13 As noted earlier in this paper, Greater Brighton and Coastal West Sussex represent a significant economic entity within the context of the wider South East. In terms of scale of jobs, the area compares with many of the other key growth ‘hotspots’ such as the Gatwick Diamond, Thames Valley and Oxfordshire.
- 6.14 There is an opportunity for local stakeholders to better leverage the combined scale and strength of GBCWS when seeking to articulate the growth potential of the area and when making the case for investment to external bodies. This will be particularly the case if a more polycentric growth strategy is being

pursued and therefore delivery of, for example new transport investment, can help unlock net additional growth the wider area. At this scale it might be possible for the business case for a particular investment to be established but which might not otherwise be possible on the basis of only considering more localised benefits.

- 6.15 There is also a broader place marketing value to promoting GBCWS in a more holistic way. A mechanism is already in place for the Greater Brighton area through the 'Superfused' initiative, but this does not currently extend to cover all parts of Coastal West Sussex.

Opportunities and Actions

- 6.16 Table 6.1 below draws together the strategy elements outlined above and identifies specific opportunities and actions for each. These are also considered in terms of the extent to which they would potentially deliver improved outcomes against each of the overall themes considered in this paper. These are broadly applicable across both Greater Brighton and Coastal West Sussex.

Table 6.1 Potential Opportunities to Support Economic Growth

Strategy element	Opportunities and actions	Relevant Themes		
		1: Economic Growth and Sectors	2: Access to Labour Force	3: Provision of Employment Space
1. Develop polycentric growth strategy for GBCWS	<ul style="list-style-type: none"> Identify the key strengths and opportunities for clustering across GBCWS, including 'mapping' of sectors to land and infrastructure requirements Define a complementary role for each part of GBCWS, and develop coordinated strategies Coordinated approach to retaining growing businesses by offering scale-up potential in accessible or proximate locations 	XX	X	X
2. Ensure economic activity is retained within the sub-region	<ul style="list-style-type: none"> Analyse business needs arising from main centres of economic activity (i.e. Brighton & Hove, Chichester) Work with expanding firms to identify future requirements for resources and space Promote the potential of new strategic employment sites (see 4 below) 	X	X	X
3. Raise productivity levels and economic output	<ul style="list-style-type: none"> Accelerate growth in high growth sectors through targeted investment in new initiatives Help low-growth legacy companies to repurpose assets and adopt new technologies Support existing companies to retain local HQs and/or encourage local expansion Expand skills and training programmes for sought-after skillsets and to help address skills deficits in some locations 	XX	X	

Strategy element	Opportunities and actions	Relevant Themes		
		1: Economic Growth and Sectors	2: Access to Labour Force	3: Provision of Employment Space
4. Ensure adequate provision of employment space to meet business needs	<ul style="list-style-type: none"> Devise realistic delivery programme for strategic sites that are planned Identify dedicated resources to support delivery and to promote new sites to market (linked to 5 below) Address the 'missing middle' in employment land supply terms, and use this as an opportunity to promote other locations 	X		XX
5. Make GBCWS a premier investment location	<ul style="list-style-type: none"> Leverage the Brighton & Hove 'brand' to articulate the economic potential of the wider area Seek cross-area place marketing to maximise potential in a crowded investment marketplace (e.g. 'Superfused') Develop institutional capacity to enable more unified approach across GBCWS to meeting indigenous and inward investment needs (in liaison with LEP) 	X	X	X

Source: NLP analysis

6.17

Following from the above, Table 6.2 outlines more specific actions for Greater Brighton and Coastal West Sussex respectively where applicable.

Table 6.2 Potential Opportunities to Support Economic Growth by Area*

Strategy element	Specific opportunities for Greater Brighton	Specific opportunities for Coastal West Sussex
1. Develop polycentric growth strategy for GBCWS	<ul style="list-style-type: none"> Undertake analysis of key sector land and infrastructure requirements to assess 'pinch points', including where enhanced public transport services would unlock potential 	<ul style="list-style-type: none"> Identify land-intensive sectors for potential relocation/expansion from constrained urban centres
2. Ensure economic activity is retained within the sub-region	<ul style="list-style-type: none"> Assess scope and capacity to address business expansion needs (particularly Brighton & Hove). 	<ul style="list-style-type: none"> Assess scope and capacity to address business expansion needs from Chichester and/or Brighton & Hove.
3. Raise productivity levels and economic output	<ul style="list-style-type: none"> Accelerate growth in high growth sectors through targeted investment in new initiatives 	<ul style="list-style-type: none"> Encourage high growth sectors through targeted investment Improve skills and training provision to maximise access to higher growth sectors
4. Ensure adequate provision of employment space to meet business needs	<ul style="list-style-type: none"> Prepare sector investment prospectuses for new employment sites – Burgess Hill (incl proposed science park) and Newhaven. 	<ul style="list-style-type: none"> Prepare sector investment prospectuses for new employment sites – Bognor Regis, Shoreham.
5. Make GBCWS	<ul style="list-style-type: none"> Leverage the Brighton & Hove 	<ul style="list-style-type: none"> Investigate options to establish

Strategy element	Specific opportunities for Greater Brighton	Specific opportunities for Coastal West Sussex
a premier investment location	<p>'brand' to articulate the economic potential of the wider area</p> <ul style="list-style-type: none"> Harness the potential of new strategic employment site locations (e.g. Burgess Hill) within inward investment markets. 	<p>more formal place promotion initiatives jointly with Greater Brighton</p> <ul style="list-style-type: none"> Harness the potential of new strategic employment site locations (e.g. Enterprise Bognor Regis) within inward investment markets.

Source: NLP analysis * Note: Adur & Worthing are included within both geographies



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Greater Brighton & Coastal West Sussex Background Papers Background Paper 2 Housing Market

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**Greater Brighton & Coastal West
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1.0

Introduction

The Greater Brighton Economic Board ('the Economic Board'), working in partnership with the Coastal West Sussex and Greater Brighton Strategic Planning Board ('the Strategic Planning Board'), commissioned a series of background papers to provide evidence and inform decision-making within Greater Brighton and Coastal West Sussex ('GBCWS').

1.1

The three background papers focus on:

- 1 Economy
- 2 **Housing Market (this paper)**
- 3 Transport System

1.2

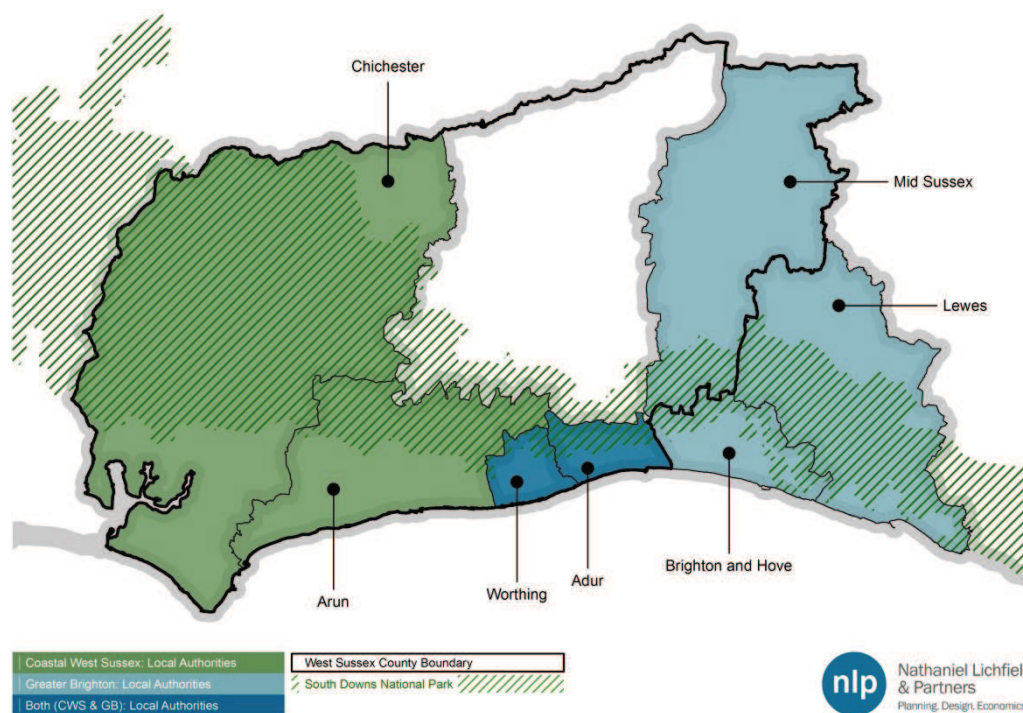
The papers have been developed by Nathaniel Lichfield & Partners ('NLP') in association with Interfleet Transport Advisory ('ITA'). An overarching Executive Summary has also been produced to accompany the individual papers.

Background

1.3

Greater Brighton and Coastal West Sussex together comprise seven local authorities and parts of the South Downs National Park Authority (SDNPA) as shown in Figure 1.1. '**Greater Brighton**' includes Brighton & Hove, Adur & Worthing, Lewes and Mid Sussex. '**Coastal West Sussex**' refers to Adur & Worthing, Arun and Chichester. It should be noted that Adur & Worthing are included within both geographies.

Figure 1.1 Spatial Definition of Greater Brighton and Coastal West Sussex



- 1.4 The **Greater Brighton Economic Board** was established in March 2014 to bring together city region leaders, business partners, universities, further education partners and the Coast to Capital Local Enterprise Partnership (LEP) to unlock barriers to the economic prosperity of the Greater Brighton City Region. The Board has been formally recognised by Government and forms a key aspect of the LEP's distributed governance and accountability structure for the delivery of the LEP's Strategic Economic Plan and Growth Deal.¹
- 1.5 The Local Planning Authorities within the Coastal West Sussex and Greater Brighton area formed the **Coastal West Sussex and Greater Brighton Strategic Planning Board** to identify and manage spatial planning issues that impact on more than one area, and support better integration and alignment of spatial and investment priorities.²

Purpose of the Background Papers

- 1.6 The brief for the project identifies that achieving long term sustainable growth across Greater Brighton and the wider Coastal West Sussex area will depend on addressing key strategic issues – notably employment land, housing, transport and other infrastructure – in an integrated and deliverable way.
- 1.7 At the 29 July 2014 meeting, the Economic Board agreed that three background papers should be commissioned which aim to support the Board to develop a greater understanding of the Greater Brighton and the wider Coastal West Sussex area around the three themes of economy, housing market and transport system.
- 1.8 Concurrent to this, the Strategic Planning Board is in the process of refreshing its Local Strategic Statement (LSS)³ which sets out long term strategic planning and investment priorities for an overlapping (although not contiguous) geography. It is the intention that a new Coastal West Sussex and Greater Brighton Strategic Local Statement will be prepared jointly with the Economic Board (under the auspices of the Officer Programme Board). This will draw upon the background papers to define priorities for the period 2015-2025, and support future funding bids and Local Plans through helping to facilitate meeting the Duty to Cooperate.

Structure of the Paper

- 1.9 The remainder of this paper is structured as follows:
- Section 2.0 outlines the **approach and methodology**.
 - Section 3.0 examines to the implications of a **growing and mobile population**.

¹ Greater Brighton City Deal, Deputy Prime Minister's Office, 12 March 2014, <https://www.gov.uk/government/publications/city-deal-greater-brighton>

² The Strategic Planning Board comprises Adur and Worthing, Arun, Brighton & Hove, Chichester, Lewes, Mid Sussex, West Sussex County Council and the South Downs National Park Authority.

³ Local Strategic Statement, October 2013, <http://www.coastalwestsussex.org.uk/wp-content/uploads/FINAL-Signed-LSS-for-CWS-Gtr-Brighton-30-Jan-14.pdf>

- Section 4.0 explores the extent to which Greater Brighton and Coastal West Sussex is planning for **future housing requirements**.
- Section 5.0 considers the approach to **delivering planned housing supply**.
- Section 6.0 draws together the thematic analysis to conclude on the **future opportunities for action**.

2.0

Approach and Methodology

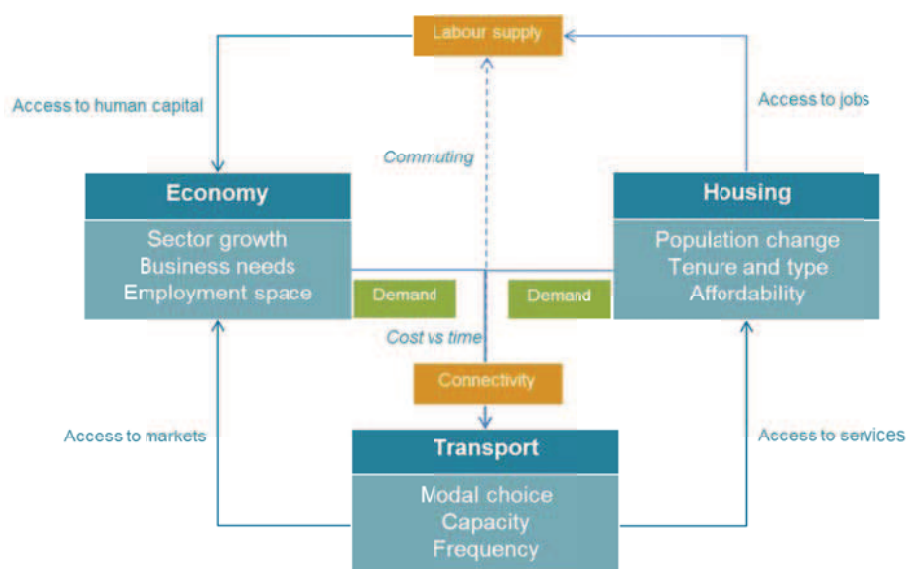
This section details the approach and methodology adopted by NLP and ITA for the purposes of preparing each of the background papers.

Approach

- 2.1 As noted in section 1.0, the purpose of the background papers is to help stakeholders within Greater Brighton and Coastal West Sussex consider how addressing strategic issues relating to the economy, housing market and transport can help achieve “*long-term sustainable growth*” for the area.
- 2.2 This analysis is being undertaken against the backdrop of significant change within the global economy, with a shift towards knowledge-based goods and services as the main drivers of productivity and economic growth. There is an increasing focus on innovation, flexibility and rapid adaptation to change so that economic assets can be used most efficiently and effectively (particularly in the context of competing locations).
- 2.3 Markets tend to operate across administrative geographies, and there has been recent attention on assessing needs across functional economic market areas.⁴ Sub-regions and greater metropolitan areas are identified as drivers of growth because of their role supporting clusters and agglomeration economies. The geographic proximity of economic assets and infrastructure can increase productivity through sustaining high-growth sectors and innovation, whilst the presence of universities and urban amenities tends to attract higher skilled workers and support new business creation.
- 2.4 This means growth of wider sub-regions is highly inter-dependent because they access shared labour and housing markets, transport networks and commuting patterns, and proximity to large institutions such as universities. Figure 2.1 outlines some of these inter-relationships to examine the role of the economy, housing market and transport system as drivers of economic growth:
- Economy – the scale and concentration of businesses and sectors, and particularly the extent to which clusters of related or complementary activities can drive support innovation and new business creation;
 - Housing market – a major determinant of access to labour supply and human capital that supports economic growth, but also as a source of demand for goods and services;
 - Transport system – transport is critical to determining the relative physical connectivity between businesses, suppliers, workers and consumers, and the costs, time and reliability of these connections.

⁴ See for example Planning Practice Guidance, paragraph 13

Figure 2.1 Inter-relationships between Economy, Housing and Transport Drivers of Growth



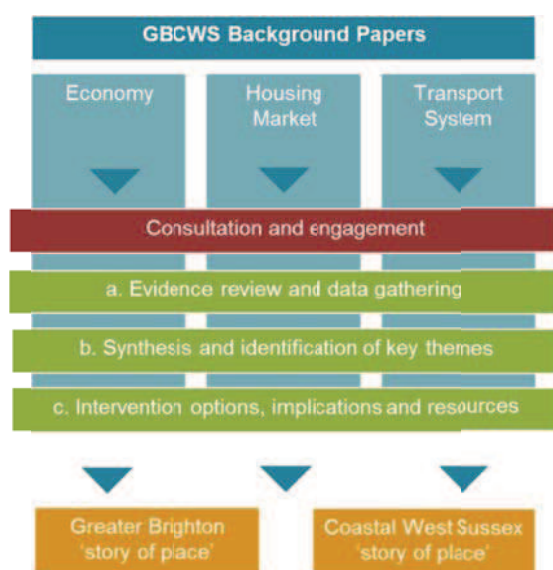
Source: NLP/ITA analysis

- 2.5 In combination, these drivers are major determinants of long-term growth. Analysing the local assets and dynamics related to each, as well as their interactions with each other, provides a basis for identifying actions and developing strategies that will help support an integrated approach to supporting long-term growth.

Methodology

- 2.6 The process for preparing the background papers has followed a three-stage methodology as set out in Figure 2.2, informed by stakeholder consultation and engagement at a number of stages.

Figure 2.2 Outline Approach for Background Papers



Source: NLP

a. Evidence review and data gathering

- 2.7 The preparation of the background papers has been underpinned by a series of key questions for the purposes of interrogating each of the economy, housing market and transport system topic areas:
- Economy: How big is the economy? What are the key sectors? How is the economy changing? What is the growth potential of the area? What is the skills profile of the area's labour force?
 - Housing market: How is the housing market area defined? What are the migration patterns within and without the area? How do house prices and affordability ratios vary across the area? What is the planned future supply of housing across the area?
 - Transport system: Where do people travel to work outside of the area? Where do people travel within the area? How do people travel, and how has this changed? What are the known transport constraints? Where is transport investment proposed?
- 2.8 The analysis draws upon existing evidence prepared at local authority, county and Local Enterprise Partnership scales supplemented by latest national datasets where available. It should be noted that this is not necessarily an exhaustive literature review but is based on a filtering of the existing evidence of most relevance to the analysis at the strategic level.
- 2.9 An important consideration for any work of this type is that it is inevitably a point-in-time assessment. This paper has incorporated the latest data and other evidence available at the point of preparation. The accuracy and sources of data derived from third party sources have not been checked or verified by NLP or ITA.

b. Synthesis and identification of key themes

- 2.10 This stage involved drawing together the existing research alongside new analysis to identify a number of key 'themes' for the purposes of considering the dynamics of both Greater Brighton and Coastal West Sussex and the future growth potential of these areas individually and on a combined basis.
- 2.11 These themes have emerged from consideration of the economic position and potential of the area, and the factors most relevant to its economic performance. Across each topic this included an assessment of:
- the key features of Greater Brighton and Coastal West Sussex and the factors and trends that have influenced the area's position today;
 - what strengths have driven the area's past economic success (including whether they will continue in the future) and what weaknesses or barriers challenge the area's economic success (and whether these challenges/barriers are likely to worsen or improve in the future);

- the inter-relationships between the Greater Brighton and Coastal West Sussex and their wider hinterland, in order to understand how these could affect the economic performance of the area and how this could change in the future.

c. Intervention options, implications and resources

- 2.12 From the review of key themes, the relevant intervention options, implications and resources have been identified. This involves describing potential economic growth ambitions for Greater Brighton and Coastal West Sussex and the priorities for action that might be required to deliver them. These relate to areas where there is a potential role for public sector intervention to address market failures or to leverage resources to help support sustainable growth, through to broader advocacy of an integrated approach to strategy on the economy, housing and transport.
- 2.13 An important consideration is that Greater Brighton and Coastal West Sussex do not function in isolation from surrounding areas, and these wider relationships are relevant to all of the economy, housing market and transport themes. It should therefore be noted that, while the analysis focuses on Greater Brighton and Coastal West Sussex, factors arising from adjoining areas will also be relevant. This is particularly in the context of the future growth potential of areas including the Gatwick Diamond, South Hampshire and Greater London.
- 2.14 It should be noted that the evidence, analysis and implications set out within the three papers do not take account of any future decisions by national Government regarding a potential second runway at Gatwick Airport, a decision on which is currently anticipated in 2015.

Consultation and Engagement

- 2.15 Across each of the stages, consultation and engagement has been undertaken with a range of stakeholders from across Greater Brighton and Coastal West Sussex. Those consulted included relevant offices within each of the local authorities, including specialists within economic development, housing, planning policy and transport.
- 2.16 This consultation process was designed to ensure that each of the background papers benefited from access to latest evidence and data but also from qualitative inputs from relevant experts. Consultation took place through a number of formats, including presentations to Board and Officer Group meetings, roundtable discussions at a stakeholder workshop held in Worthing in February 2015, as well as some individual interviews. In addition, this work was coordinated through a Steering Group comprising representatives of the Economic Board and Strategic Planning Board.

Guide to Terminology

- 2.17 This paper contains references to objectively assessed housing needs, housing requirements and planned housing supply, the below sets out an explanation of the terminology used (this accords with the 2014 Solihull High Court Decision⁵):
- **Objectively assessed housing need** – the objectively assessed need for housing in an area broadly encompasses demographic needs, analysis of market signals, economic factors and provision for all types of housing (including affordable), not taking into account any policy considerations concerning the ability to meet these housing needs.
 - **Housing requirement** – this figure reflects not only the objectively assessed need for housing, but also any policy considerations that might require that figure to be manipulated to determine the actual housing target for an area. For example, built development in an area might be constrained by the extent of land which is the subject of policy protection. Once these policy considerations have been applied to the figure for full objectively assessed need for housing in an area, the result is a housing requirement figure.
 - **Planned housing supply** – this relates to the projected supply of housing as identified in the individual housing trajectories of each local authority for the period 2015 to 2025 only. It does not take account of planned housing supply over the entirety of a Local Plan period.

Time Horizons

- 2.18 This paper covers the ten year period 2015 to 2025, and therefore is shorter than the time horizons set out in the individual Local Plans being brought forward across Greater Brighton and Coastal West Sussex which generally extend beyond this timescale. References in this paper to housing needs, requirements and planned housing supply relate to this period only, and do not take account of the entirety of a Local Plan period.
- 2.19 Therefore fluctuations in the projected rate of housing delivery may not necessarily be identified when looking only over a ten year period and not the entirety of a Local Plan where delivery prior to 2015 and after 2025 will also be relevant.

⁵ (1) Gallagher Homes Limited and (2) Lioncourt Homes Limited v Solihull Metropolitan Borough Council [2014] EWHC 1283

3.0

A Growing and Mobile Population

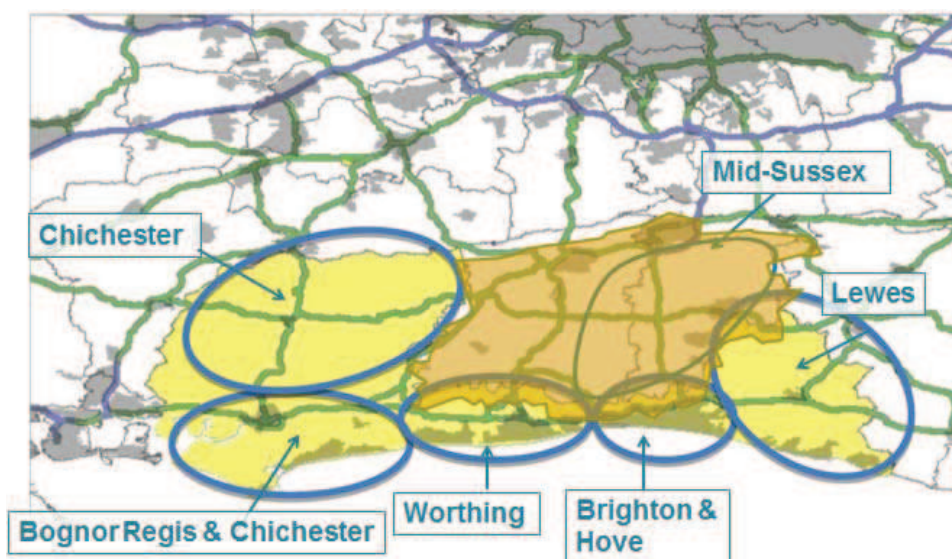
The housing market of Greater Brighton and Coastal West Sussex is characterised by significant levels of recent population growth and movement of people both within and from outside of the area. The future availability and distribution of working-age population will be particularly important to meeting the area's economic needs.

Housing Market Areas

3.1

To begin analysis of housing in Greater Brighton and Coastal West Sussex, it is necessary to first consider which Housing Market Areas (HMAs) the sub-region relates to. Planning for housing must be undertaken across a HMA in accordance with government policy, but it is likely that a HMA will cross local authority boundaries, so cooperation is required. Figure 3.1 shows that Greater Brighton and Coastal West Sussex is defined by two HMAs, Mid Sussex falls within a separate (orange) HMA to the rest of Greater Brighton and Coastal West Sussex which falls in its own (yellow) HMA. Within these HMAs there are also a series of sub-area housing markets, for example there is a strong relationship between Bognor Regis and Chichester. As can be seen, each local authority does not necessarily fall within its own sub-area of a larger HMA.

Figure 3.1 Housing Market Areas across Greater Brighton and Coastal West Sussex



Source: Coastal West Sussex SHMA (2014); Northern West Sussex SHMA (2012)

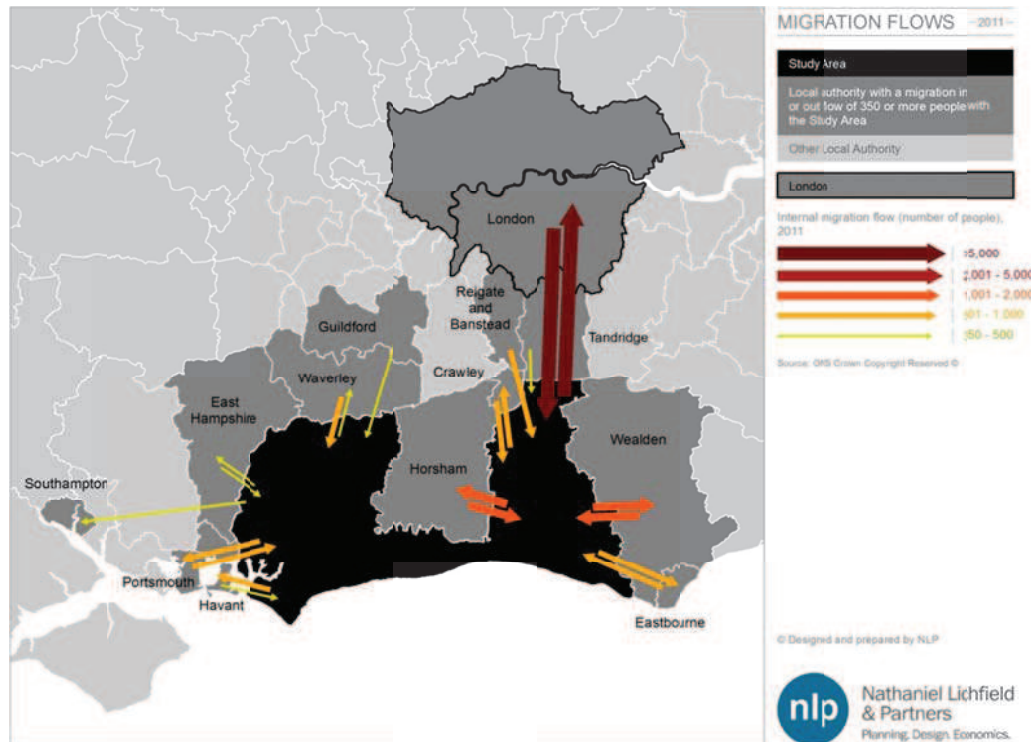
Migration Flows

3.2

Greater Brighton and Coastal West Sussex experience significant migration patterns with its surrounding hinterland (such as Crawley and Horsham) as well internally, these migration patterns are set out below in Figure 3.2. As a combined area, Greater Brighton and Coastal West Sussex represents a net importer of people from elsewhere, particularly from Greater London. To

illustrate this point, in 2011, there was net in-migration from Greater London to Greater Brighton and Coastal West Sussex amounting to nearly 3,000 people (2011 Census). There is no evidence to suggest that these patterns of migration into and out of Greater Brighton and Coastal West Sussex will not continue into the future, but it is likely there will be increasing competition for mobile population from other growth locations (for example the Gatwick Diamond or arising from the general expansion of Greater London).

Figure 3.2 Migration Flows 2011



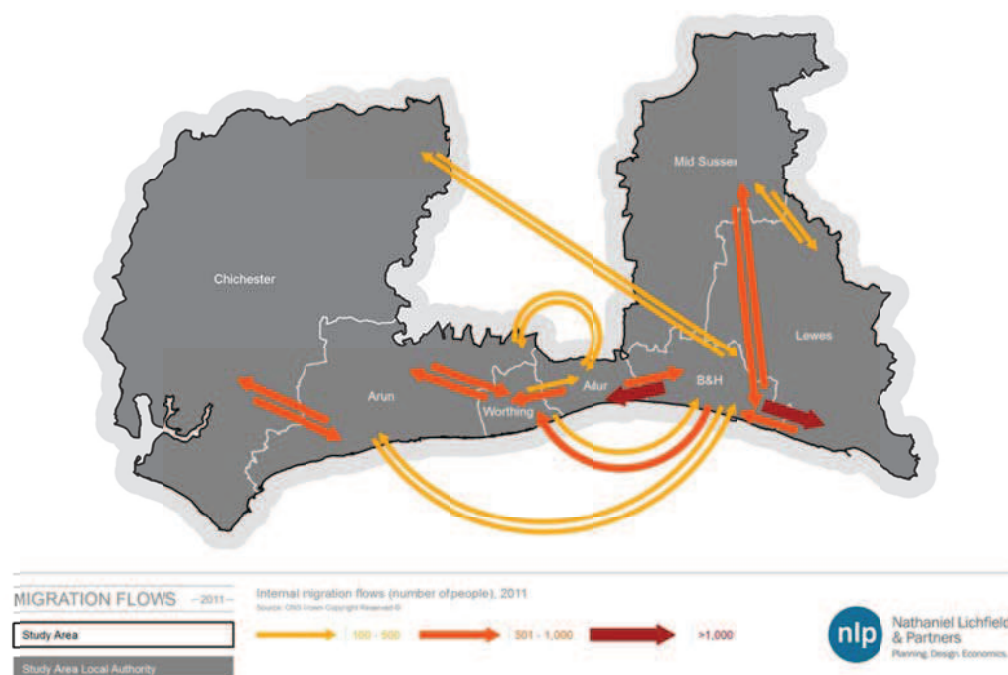
Source: 2011 Census / NLP analysis

3.3

Internal migration patterns within Greater Brighton and Coastal West Sussex show significant outward migration from Brighton & Hove to elsewhere in the area, notably Adur and Lewes. The 2011 Census net migration flows from within the area for each individual local authority are set out below, and indicate that only Arun and Chichester experience overall net in-migration. Furthermore, whilst the Greater Brighton area experiences annual net out migration equating to -4,450 people, Coastal West Sussex area experiences overall net in migration amounting to +1,030 people.

- Adur: -290;
- Arun: +365;
- Brighton & Hove: -1,795;
- Chichester: +1,505;
- Lewes: -470;
- Mid-Sussex: -1,345; and
- Worthing: -550.

Figure 3.3 Migration Flows 2011

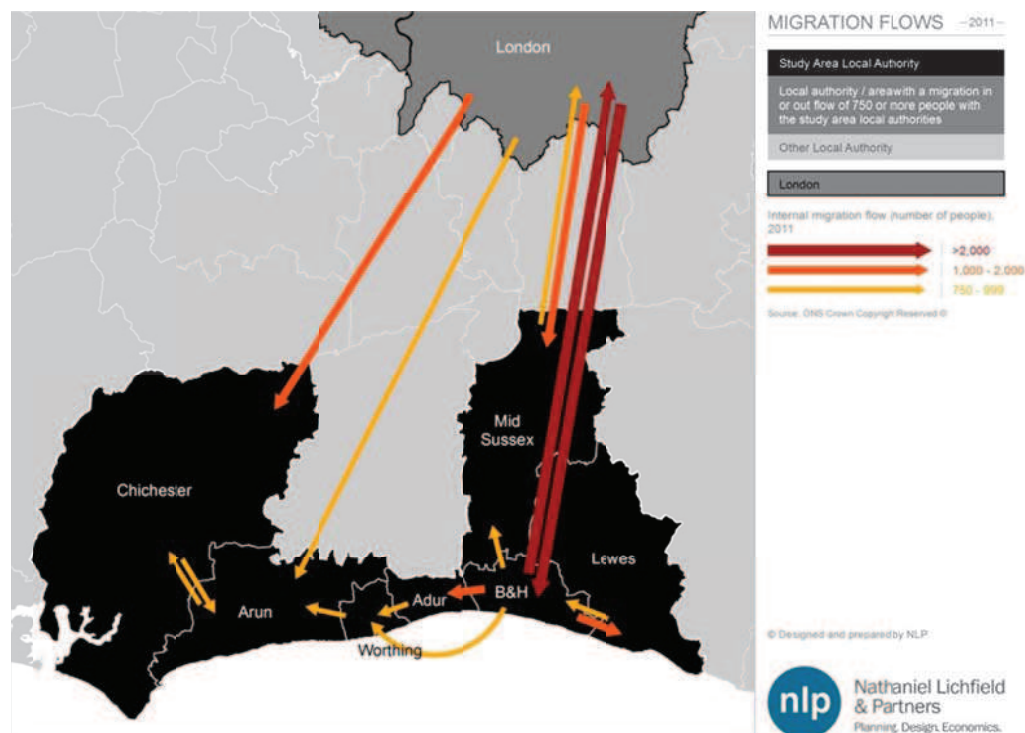


Source: 2011 Census / NLP analysis

3.4

The above two maps are combined in Figure 3.4 below. It is clear that Brighton & Hove acts as the main attractor of people into Greater Brighton and Coastal West Sussex, but some people then migrate outwards from Brighton & Hove to other parts of the area.

Figure 3.4 Migration Flows 2011




Source: 2011 Census / NLP analysis

3.5 One reason why these patterns of migration, particularly internally, are important in relation to housing market choices relates to affordability. Affordability in the Greater Brighton and Coastal West Sussex area varies by local authority, but affordability issues (due to the high cost of housing) are most pronounced in Brighton & Hove and Chichester. Table 3.1 below shows affordability ratios based on the cost of a median dwelling compared to median earnings in each local authority.

3.6 As set out above, although Brighton & Hove is the primary destination for migrants moving into Greater Brighton and Coastal West Sussex, the evidence suggests that people are unable to afford to stay within the City as their housing requirements change. This affects a number of different types of households including single people, couples and those starting a family for reasons of affordability, but also the types of housing required to accommodate their needs. As such, there is a pronounced pattern of people moving out of Brighton & Hove internally within the Greater Brighton and Coastal West Sussex area. It is of note that some 80% of those moving out of Brighton & Hove within the Greater Brighton and Coastal West Sussex area are of working age and many of these people may commute back to work in Brighton & Hove.

Table 3.1 Median Affordability Ratio by Local Authority (2013)

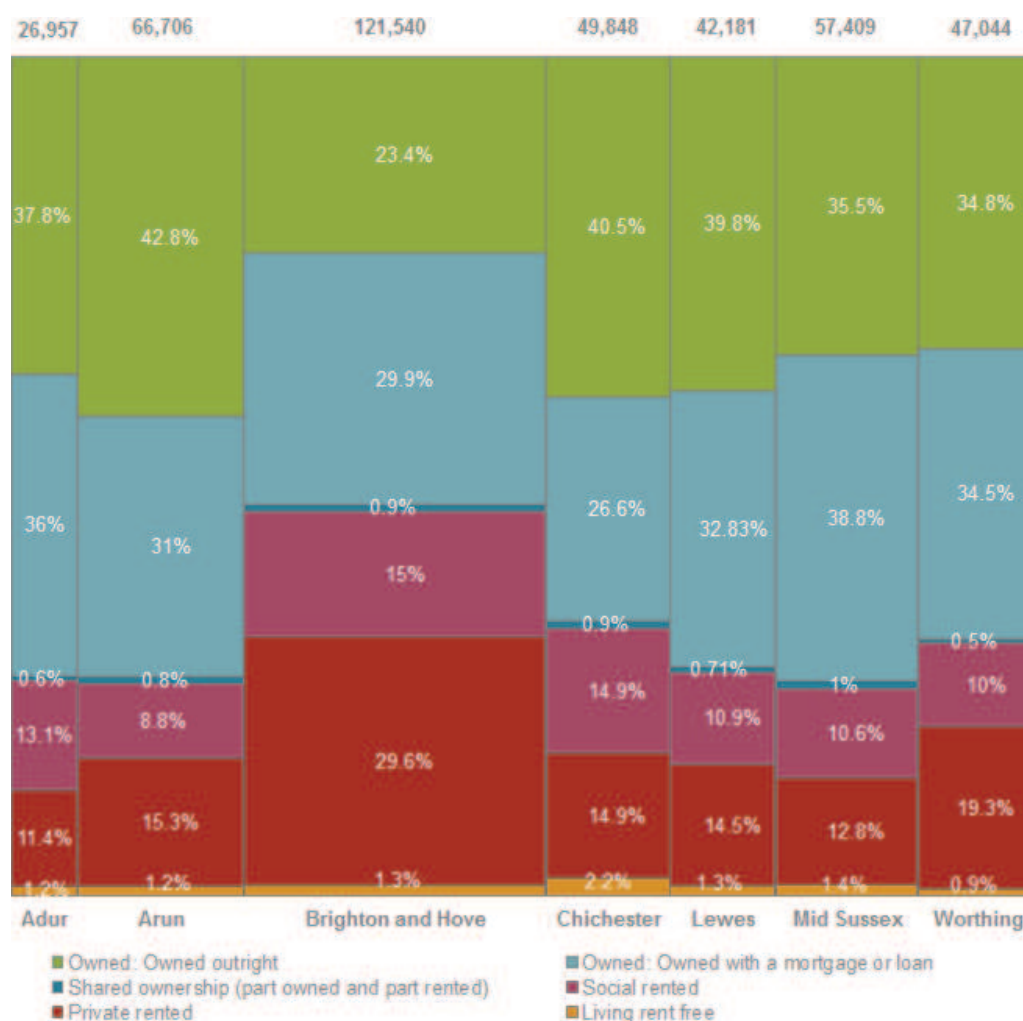
	Local Authority	Median Affordability Ratio (2013)
Worsening housing market outcomes  Improving housing market outcomes	Chichester	10.55
	Brighton & Hove	10.09
	Mid-Sussex	9.76
	Arun	9.65
	Adur	9.64
	Lewes	9.01
	Worthing	7.78
	GBCWS Average	9.50
	England	6.72

Source: NLP analysis

3.7 Related to housing affordability, in Brighton & Hove the split between housing tenures is notably different to that in the rest of Greater Brighton and the wider Coastal West Sussex area. This is set out in Figure 3.5 below. In Brighton & Hove there is a lower proportion of owner-occupied housing (either outright or with a mortgage) and a higher proportion of private renters in comparison to neighbouring authorities. This could reflect that people who find it more difficult to access home ownership in Brighton & Hove are potentially looking to the private rental sector as an alternative. However, the cost of renting is not

necessarily an affordable option because private renters tend to spend more on living expenses (circa 40%) than those with a mortgage (circa 20%).⁶

Figure 3.5 Tenure split across Greater Brighton and Coastal West Sussex



Source: Census 2011 KS402EW - Tenure

3.8

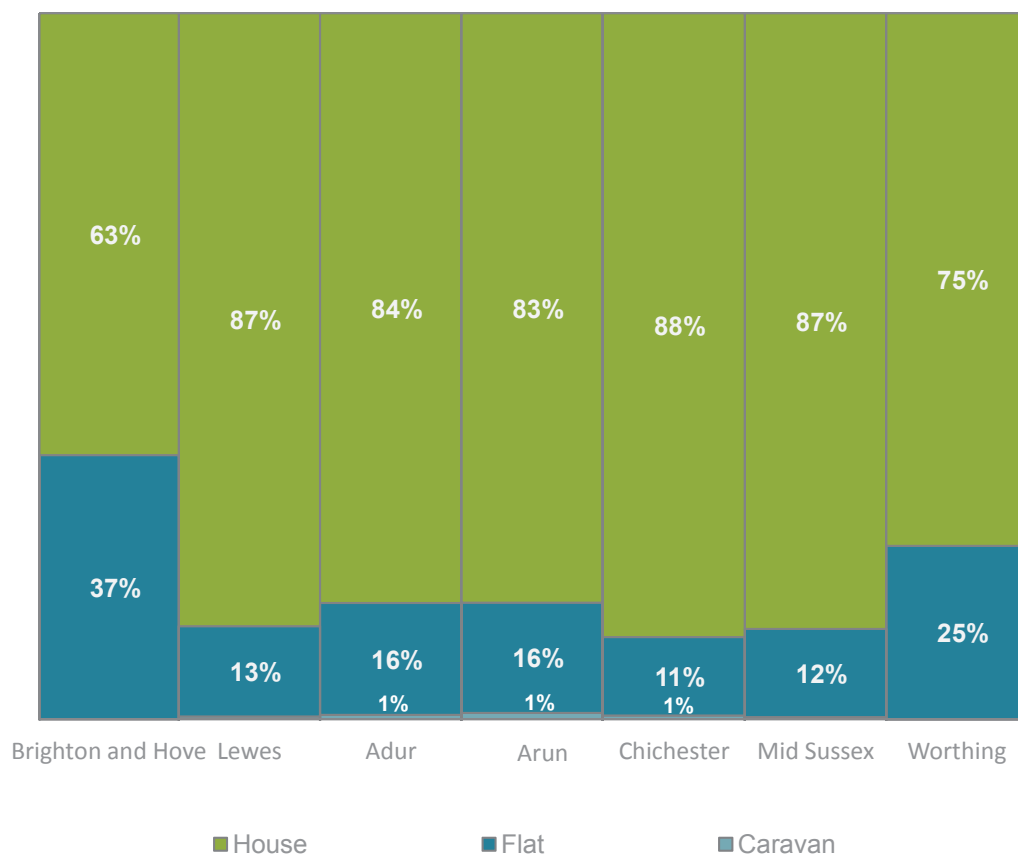
The above analysis identifies that Brighton & Hove has a different tenure split to the rest of Coastal West Sussex with a lower proportion of owner-occupied housing and a higher proportion of private renters, suggesting that affordability pressures are forcing people into the private rented sector. A similar pattern can be seen in Brighton & Hove in relation to the stock of housing. Brighton & Hove has the greatest proportion of flats compared to anywhere else in the Greater Brighton and Coastal West Sussex area with more than a third, this is followed by Worthing where a quarter of the dwelling stock is flats. This suggests that people may not move from Brighton & Hove elsewhere within Greater Brighton and Coastal West Sussex simply on the grounds of affordability, but potentially because housing aspirations cannot be met in the City.

⁶ English Housing Survey (2013/14)

3.9

Greater Brighton and Coastal West Sussex needs to cater for different housing market needs to help retain population and workers at different stages of their lives through provision of flats, family homes and retirement accommodation. Currently, if residents of Brighton & Hove aspired to own a house, this is less likely to occur in the City due to affordability, but also because there is a more restricted supply of housing stock available compared to the rest of Greater Brighton and Coastal West Sussex.

Figure 3.6 Type of Stock in Greater Brighton and Coastal West Sussex



Source: Census 2011

3.10

The above analysis identifies a clear pattern of people moving into Brighton & Hove from outside Greater Brighton and Coastal West Sussex, but identifies that pressures of affordability and more restricted stock availability leads to some people moving out into the wider Greater Brighton and Coastal West Sussex area (but often still retaining employment in the City). Overall, this internal pattern of movement out of Brighton & Hove but with continued commuting back into the City for work has strong implications for the economy with regards to retaining a workforce and the transportation network, notably east-west routes along the coast.

Age Profile

3.11

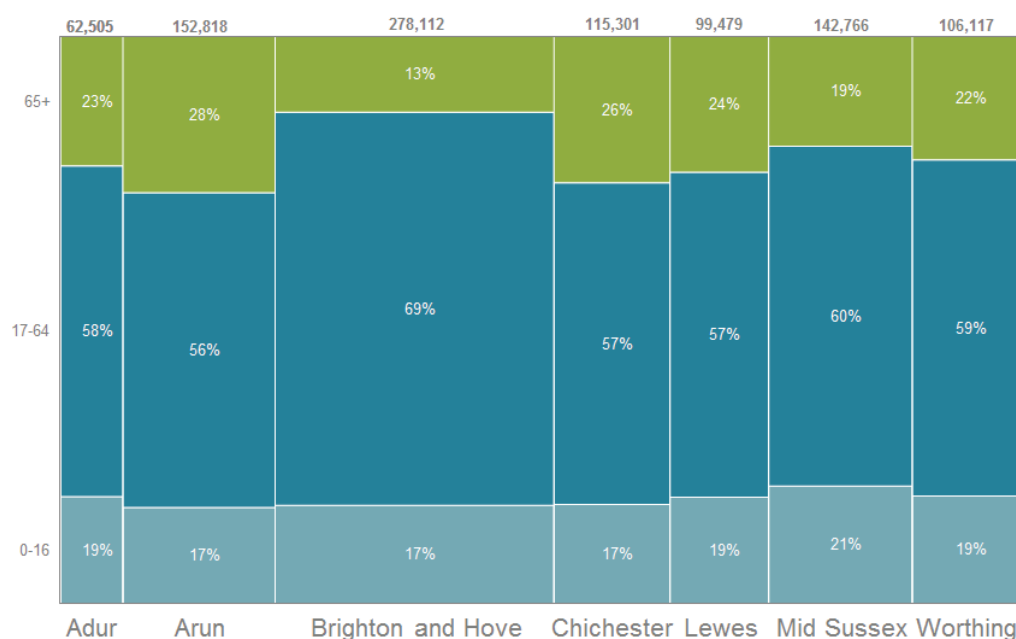
Looking at the population age structure of the individual local authorities in Greater Brighton and Coastal West Sussex (set out in Figure 3.7), it is

apparent that Brighton & Hove is a relatively young location compared to other parts of Greater Brighton and Coastal West Sussex. By comparison Arun and Chichester have a greater proportionate share of residents over the age of 65 and a lower percentage of working age residents between 17 and 54 years old.

3.12

It should be noted that the population profile is not just about the relative proportions within different age groups. As set out previously, Greater Brighton and Coastal West Sussex needs to collectively cater for different housing market needs in order to help retain population and workers through what can be referred to as a “housing ladder” approach. This represents the typical cycle of housing types which people will reside in at different stages of their life, including starter flats, family homes and retirement accommodation. As discussed previously a high proportion of flatted accommodation in Brighton & Hove appears to be attracting younger workers, but affordability pressures combined with a lack of housing stock is making it difficult to retain these residents as their housing aspirations change.

Figure 3.7 Population Age Structure 2013

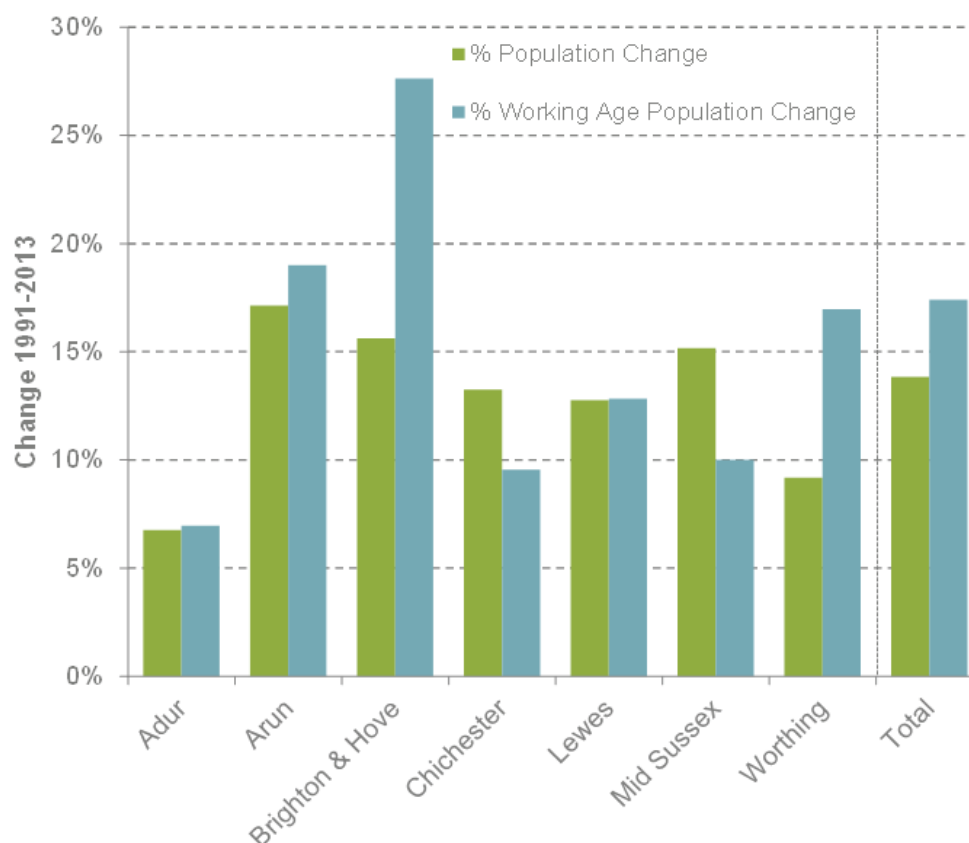


Source: ONS 2013 Mid-Year Estimates / NLP analysis

3.13

Finally, as set out in Figure 3.8, the total population of Greater Brighton and Coastal West Sussex has been growing, but it is clear that some locations have a greater proportionate increase in the working age population than others. Between 1991 and 2013 the working age population increased at a greater proportion than the whole population of Greater Brighton and Coastal West Sussex. This is notably the case in Brighton & Hove. Elsewhere the working-age population has been growing at a slower rate by comparison, but still greater than the proportionate population increase, with the exception of Mid Sussex and Chichester.

Figure 3.8 Overall Population Growth and Working Age Population Growth – 1991-2013

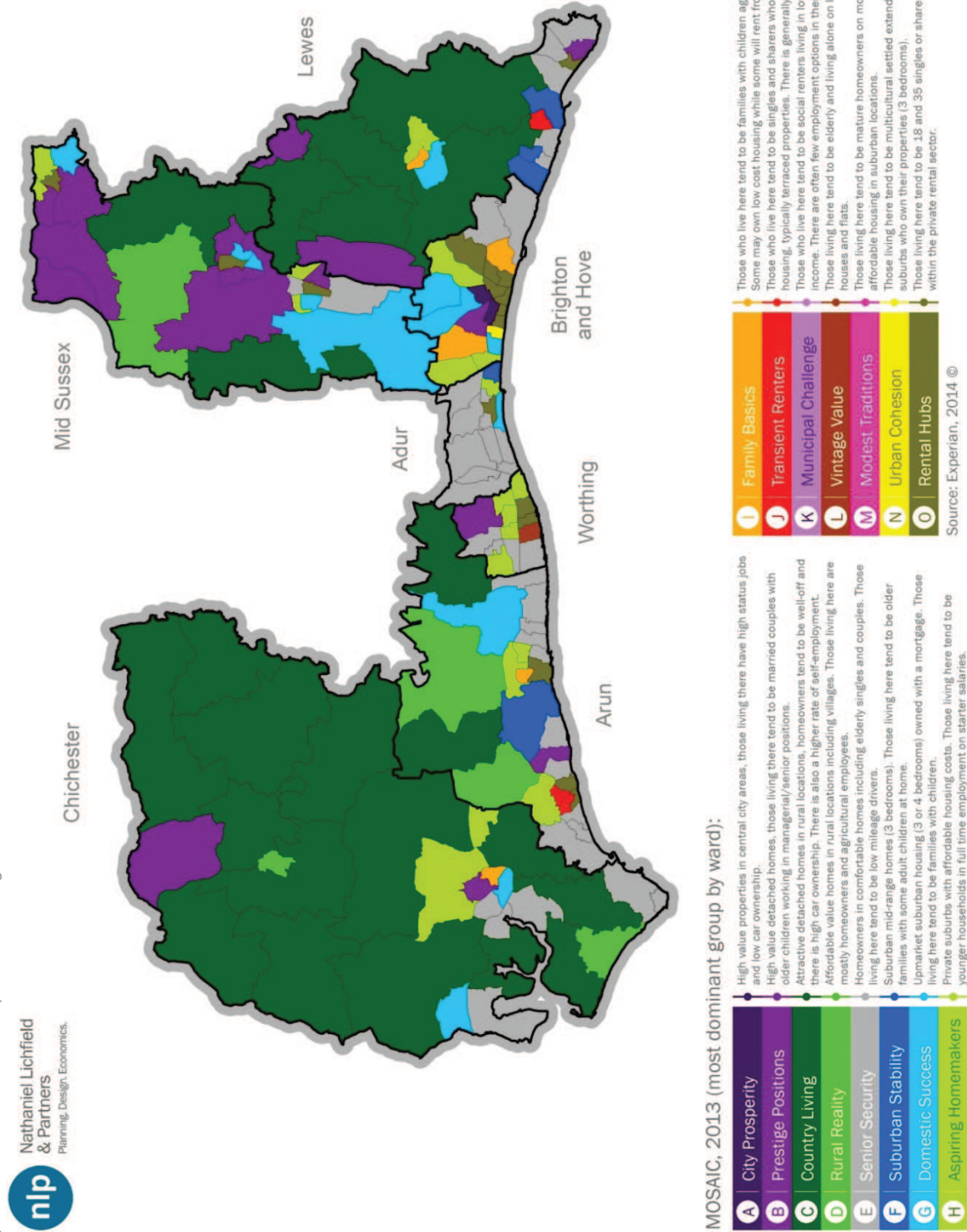


Source: ONS Mid-Year Estimates, 1991 and 2013 / NLP analysis

Housing Market Outcomes

- 3.14 A combination of the above analysis in relation to migration patterns, population profile and housing affordability, stock and tenure in the Greater Brighton and Coastal West Sussex area has led to a distinct pattern of housing market outcomes at present.
- 3.15 Mosaic is a tool compiled by Experian which undertakes cross-channel consumer classifications designed to help understand the demographics, lifestyles, preferences and behaviours of the UK adult population in detail at small geographic levels. Mosaic classifies areas into one of fifteen categories dependent on the prevailing patterns. This analysis has been undertaken for Greater Brighton and Coastal West Sussex and is set out below in Figure 3.9.

Figure 3.9 Mosaic Map of Greater Brighton and Coastal West Sussex



- 3.16 Figure 3.9 shows that Brighton & Hove, Adur and Worthing, as well as areas along the coast in other authorities, attract those on starter salaries (young workers) in the 'Rental Hubs' as well as 'Aspiring Home Owners' and 'Family Basics' who are looking for lower cost housing. This is explained by the higher proportion of private renters and flatted accommodation in Brighton & Hove compared to the remainder of Greater Brighton and Coastal West Sussex. There also seems to be a group of people in between the lower paid workers and those looking for low cost housing and well off home owners, this is the category 'Domestic' Success'. These people tend to be families with children and own suburban housing with a mortgage. These areas are most prominent in the north of Brighton & Hove moving into southern Mid Sussex and Arun.
- 3.17 This implies that as the young and highly skilled residents of Brighton & Hove (Aspiring Home Owners and those in Rental Hubs) get older and their housing choices change to include smaller houses, they are unable to meet these needs in Brighton & Hove. This cohort of residents is key to the success of the Brighton economy and the ability to retain them is important. The danger is that as people leave Brighton & Hove, almost in a concentric circle depending on the stage in the housing 'life cycle', they move physically further away from the City. If affordability becomes so pressing in Greater Brighton and Coastal West Sussex as a result of the ripple effect from Brighton & Hove specifically, people may move beyond the boundaries of Greater Brighton and Coastal West Sussex. Moving such a distance away from the City may mean that it is no longer feasible to remain employed in Brighton & Hove and commute a long distance daily, and therefore they may choose to work elsewhere.

Summary

- 3.18 The population of Greater Brighton and Coastal West Sussex has been growing over time, including from significant levels of in migration, notably younger working age people from Greater London. The population within Greater Brighton and Coastal West Sussex is highly mobile which is demonstrated by the internal migration flows within the area, notably outwards from Brighton & Hove.
- 3.19 This outward migration trend from Brighton & Hove is important to both the economy and transportation in Greater Brighton and Coastal West Sussex because 80% of those moving out of Brighton & Hove within Greater Brighton and Coastal West Sussex are of working age. Many of these groups commute back to Brighton & Hove from elsewhere in Greater Brighton and Coastal West Sussex, putting pressure on transportation into Brighton & Hove (e.g. parking provision is highly constrained and significant urban congestion).
- 3.20 Housing affordability issues in Brighton & Hove are compounded by a different tenure split compared to other local authorities in the Greater Brighton and Coastal West Sussex Area. A lower proportion of owner occupiers and higher proportion of private renters suggests that affordability pressures in the City are

forcing people into the rental market. Furthermore, types of housing to fit all stages of a resident's life cycle are not necessarily attainable in the City itself.

3.21

Brighton & Hove is a relatively young city, and more generally across Greater Brighton and Coastal West Sussex the proportion of the working-age population has grown strongly except for in Mid Sussex and Chichester. However, if affordability does not improve or younger high skilled people are unable to meet their housing aspirations in Greater Brighton and Coastal West Sussex, there is evidence that they may relocate further afield. This could impact the economic potential of Greater Brighton and Coastal West Sussex as people find themselves commuting over such a distance that retaining the job is not viable.

4.0

Meeting Future Housing Requirements

This section considers future housing requirements based on existing published evidence and the emerging plans of each local planning authority within Greater Brighton and Coastal West Sussex, and examines the distribution of planned supply and implied rate of delivery over 2015-2025.

Identifying Future Housing Requirements

- 4.1 Section 3.0 analysed the current patterns and trends impacting the housing market within Greater Brighton and Coastal West Sussex, and the potential outcomes arising from these. This section considers future housing requirements within the area drawing on existing assessments of housing needs within the Housing Market Areas (HMAs) that cover GBCWS.⁸
- 4.2 The Coastal West Sussex Strategic Housing Market Assessment (SHMA) (August 2013)⁹ is a housing evidence study commissioned by all authorities in Greater Brighton and Coastal West Sussex with the exception of Mid Sussex. It also included the areas of the South Downs National Park Authority (SDNPA) which fell within the study area, but not the entire area covered by the SDNPA.¹⁰ In the case of Chichester, the report identifies housing needs for the entire District which includes the area covered by the SDNPA. Mid Sussex's most up to date housing evidence is contained in the Mid Sussex District Council Draft Housing and Economic Development Needs Assessment (HEDNA) (February 2015).
- 4.3 Based on the latest published position, the local planning authorities across Greater Brighton and Coastal West Sussex (excluding the South Downs National Park Authority) are currently planning for a housing requirement of 30,520 dwellings over the next decade. However, the existing technical evidence studies indicate that housing needs could collectively be higher taking account of future demographic and economic growth factors.
- 4.4 The SDNPA is at the early stages of producing its own Local Plan, with a SHMA currently being prepared. Housing figures for the National Park are therefore not currently available for inclusion within this paper. However, a housing requirement will be set out in the SDNPA's Preferred Options consultation due to take place later this year and will also contribute to meeting the housing need in this and three other HMAs.

⁸ Excluding the South Downs National Park Authority. Data on housing needs, housing requirement and housing supply are not all available at this time, as such data on this authority has been omitted to avoid skewing the results. Albeit, some local authorities' housing requirements may make an allowance for the SDNPA.

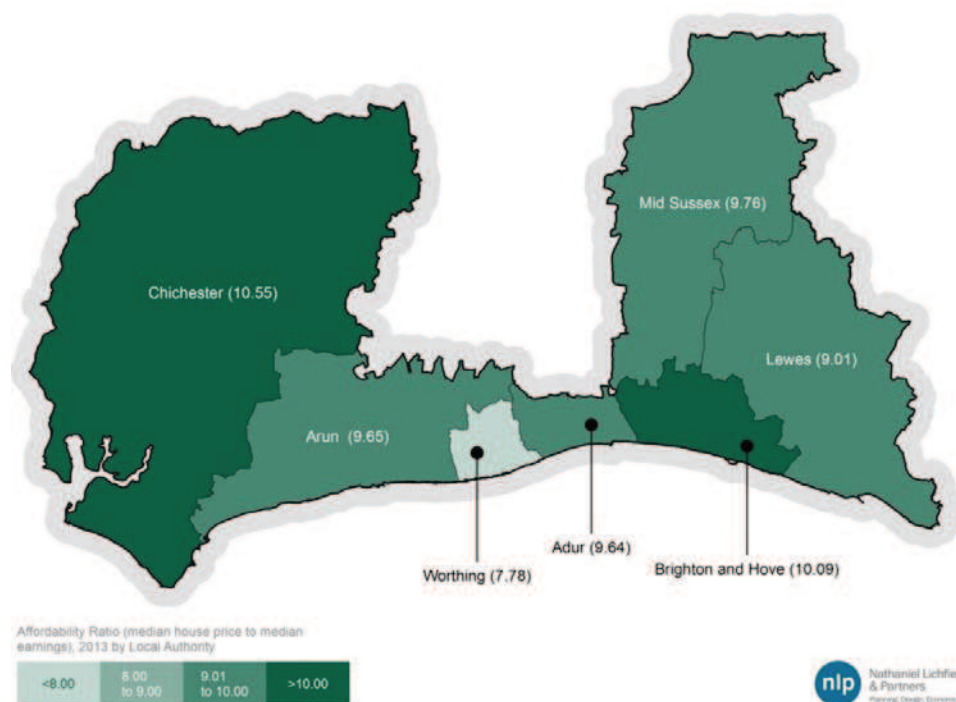
⁹ GL Hearn produced a further iteration of this study in April 2014 entitled 'Assessment of Housing Development Needs Study: Sussex Coast HMA', however this study does not update the modelling undertaken in the August study.

¹⁰ The SDNPA will be publishing a SHMA in 2015, but this was not available at the time of writing.

Potential implications of a lack of housing

- 4.5 There are a number of potential implications if future planned housing requirements are not sufficient to meet identified needs and/or a sufficient rate of delivery is not sustained (see later section). When there is a greater demand for housing than supply can cater for, it is those with greater purchasing power who can obtain a property. People looking to buy or rent a home who cannot afford to do so in Greater Brighton and Coastal West Sussex (due to a lack of supply) may find themselves unable to remain in Greater Brighton and Coastal West Sussex and/or having to live with parents or moving into shared households until later in life (known as 'concealed households').
- 4.6 Some of these issues are already being experienced in Greater Brighton and Coastal West Sussex as housing affordability is a major issue and is most acute in Brighton & Hove and Chichester (see section 3.0). On the basis of someone earning a median salary compared to all other workers in Chichester and Brighton & Hove, the price of a house would be more than 10 times the median salary. The most affordable part of Greater Brighton and Coastal West Sussex is Worthing, but even there the median house prices are still nearly eight times median earnings.

Figure 4.1 Median Affordability Ratio across Greater Brighton and Coastal West Sussex (2013)



Source: CLG Live Tables / NLP analysis

- 4.7 A typical basis for mortgage lending is within the range of three to four times salary levels, and against this measure it draws the scale of the affordability issue in Greater Brighton and Coastal West Sussex into sharp focus. As it stands, Greater Brighton and Coastal West Sussex overall (and Brighton & Hove and Chichester in particular) is at risk of 'pricing out' lower paid workers

due to both housing affordability pressures and a lack of appropriate stock (see section 3.0).

4.8

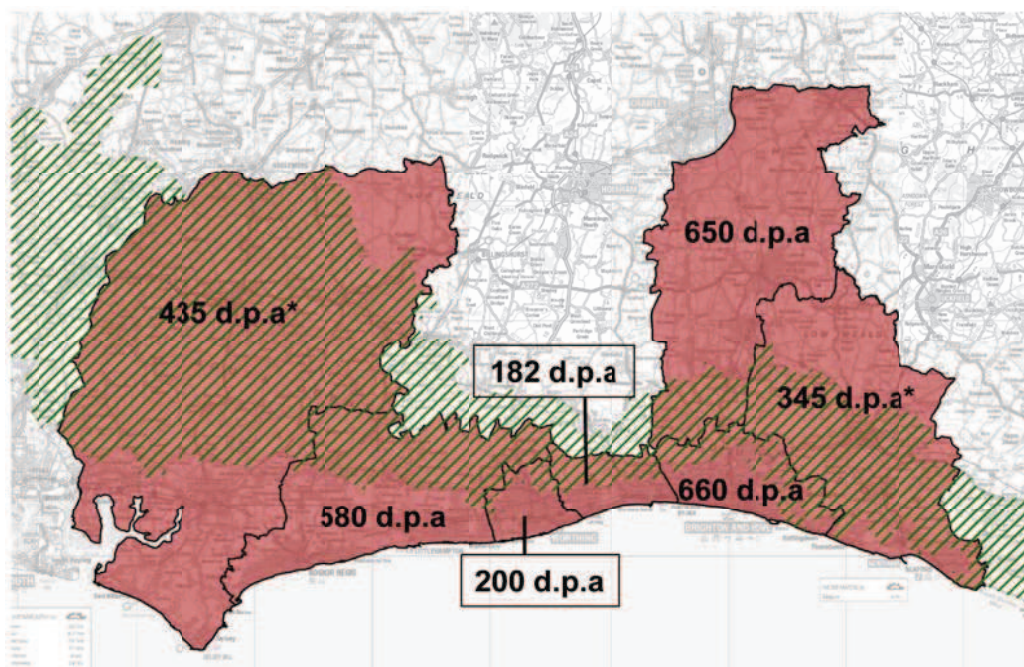
According to the English Housing Survey, in 2013-14 almost half (48%) of all households aged 25-34 rented privately, up from 45% in 2012-13. The proportion in this age group living in the private rented sector has more than doubled from 21% in 2003-04. Over the same 10 years, owner occupation in this age group dropped from 59% to 36%. Private tenants spend more of their income on living expenses, with homeowners paying an average of 20% of their income on a mortgage compared to private tenants paying 40% of their income on rent. This creates a vicious cycle which makes it difficult to save for a deposit, leading to even fewer young adults becoming homeowners. These circumstances may not make Greater Brighton and Coastal West Sussex an attractive location for lower paid earners, notably younger cohorts of the population, which in turn impacts the economy if Greater Brighton and Coastal West Sussex cannot retain or attract workers.

Spatial Distribution of Housing Requirements

4.9

As noted above, housing requirement figures at March 2015 in draft or emerging Local Plans, adopted Local Plans or Local Plan Inspector's reports identify that local authorities within Greater Brighton and Coastal West Sussex are collectively planning to deliver 3,052 dwellings per annum to 2025. The spatial distribution of planned housing growth across Greater Brighton and Coastal West Sussex every year is set out below in Figure 4.2.

Figure 4.2 Annualised Rate of Planned Housing Growth in Local Plans (adopted and emerging)



Source: NLP review of adopted and draft Local Plans at time of preparation.

Note: Figure for Lewes based on Inspector's initial findings, February 2015, and includes both Lewes District and the South Downs National Park (area which falls within Lewes District) because a

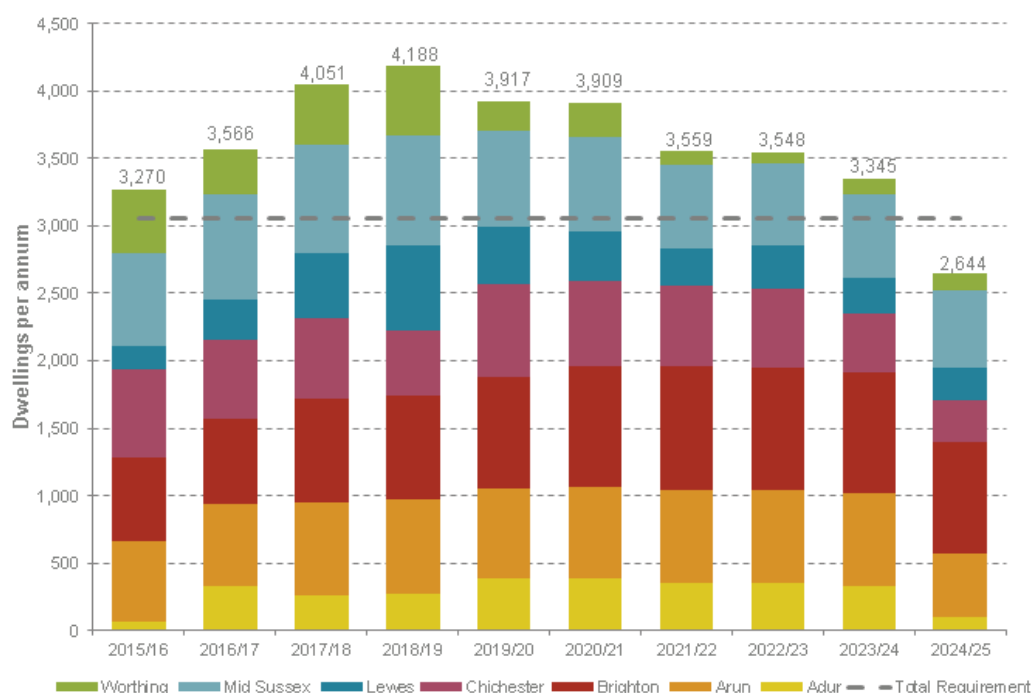
Joint Core Strategy is being prepared. The figure for Chichester excludes the areas within the District that fall within the South Downs National Park.

Planned Housing Supply

- 4.10 The housing trajectories proposed by each local authority in Greater Brighton and Coastal West Sussex at March 2015 in draft or emerging Local Plans, adopted Local Plans or Local Plan Inspector's reports (see Appendix 1) indicate that the housing requirement figure currently being planned for across Greater Brighton and Coastal West Sussex can be accommodated. Compared to the 30,520 dwellings currently planned for by 2025, potential capacity for 35,998 dwellings is set out in trajectories to be delivered by 2025. However, because this does not reflect the full extent of the time horizon for Local Plans, this effectively includes some 'front loaded' capacity which will contribute to meeting needs beyond 2025 up until the end of the respective Local Plan periods of individual authorities.
- 4.11 The total identified supply of new dwellings in each local authority up to 2025 is set out below. Noting that Adur and Worthing fall into both Greater Brighton and Coastal West Sussex, Greater Brighton is providing the greatest supply of housing at 22,490 (65%)¹¹ units compared to Coastal West Sussex which is providing 17,511 (51%) units.
- Adur - **2,844** dwellings (7.90% of total supply);
 - Arun - **6,455** dwellings (17.93% of total supply);
 - Brighton - **8,065** dwellings (22.41% of total supply);
 - Chichester - **5,551** dwellings (15.42% of total supply);
 - Lewes - **3,489** dwellings (9.69% of total supply);
 - Mid Sussex - **6,933** dwellings (19.26% of total supply); and
 - Worthing - **2,661** dwellings (7.39% of total supply).
- 4.12 On an annual basis, over the next ten years Figure 4.3 shows that cumulatively across Greater Brighton and Coastal West Sussex there are projected peaks in delivery in years 2017/18 and 2018/19. These peaks may relate to monitoring assumptions (for example outstanding planning permissions which have not yet commenced would generally be phased in years three and four). By 2024/25 delivery will fall below the annual housing figure currently being planned for across Greater Brighton and Coastal West Sussex, albeit this is made up cumulatively over the ten year period by higher assumed rates of delivery in earlier years.
- 4.13 As noted above, a Local Plan for the South Downs National Park Authority is currently being prepared. This will include a housing figure for the National Park, which includes parts of the local authorities in the Greater Brighton and Coastal West Sussex Area.

¹¹ Because Adur and Worthing appear in both locations the percentages will not sum to 100%

Figure 4.3 Housing Trajectory of Greater Brighton and Coastal West Sussex 2015 - 2025



Source: Local authority housing trajectories, SHLAA's and monitoring reports

4.14

Table 4.1 compares the projected housing delivery rates implied by the local authority housing trajectories for the 2015-2025 period with past completion rates for each authority within Greater Brighton and Coastal West Sussex.¹² In overall terms, this shows that future housing delivery rates will have to be 53% higher compared to past trends, delivering 3,599 dwellings p.a. compared to 2,360 dwellings p.a. historically. The implied uplift in housing delivery for Greater Brighton is 55%, and 48% for Coastal West Sussex. The highest uplift within an individual authority arises in Adur (+118%), although this reflects the presence of a number of large scale sites within the trajectory for this location.

¹² Based on local authority Annual Monitoring Reports for the period 2006/07 – 2013/14

Table 4.1 Average past housing completions compared to average projected future housing delivery in Greater Brighton and Coastal West Sussex

	Average Past Completions p.a. (2006/07 – 2013/14)	Average Projected Future Completions p.a. (2015/16 – 2024/25)	% change
Adur	131	284	118%
Arun	496	645	30%
Brighton and Hove	483	807	67%
Chichester	313*	555	77%
Lewes	235	349	48%
Mid Sussex	457	693	52%
Worthing	245	266	9%
Coastal West Sussex	1,185	1,750	48%
Greater Brighton	1,551	2,399	55%
Greater Brighton and Coastal West Sussex	2,360	3,599	53%

Source: Local authority Annual Monitoring Reports and NLP analysis

Note: Adur and Worthing included within figures for Greater Brighton and Coastal West Sussex

* The average past completion figures for Chichester relate only to completions within the District outside of the South Downs National Park based on 'best fit' Parish-level data. This allows for direct comparison with the average projected future completions which also exclude parts of the District that are within the National Park.

Housing Types

4.15 As set out earlier in the paper, there is a need to cater for different housing market needs to help retain population and workers at different stages of their lives through the provision of flats, family homes, and retirement accommodation. Younger working-age population groups appear to be clustered in Brighton & Hove and some areas of Adur and Worthing, largely in rental accommodation and low cost housing. The next stage in the Experian Mosaic categories for these people could be considered to be 'Domestic Success' whereby young families move to suburban housing. Currently this group is located to the north of Brighton & Hove, Mid Sussex and parts of Adur, Arun and Lewes. This represents people moving out almost in a concentric circle to meet their housing choices.

4.16 As such, those locations immediately surrounding Brighton & Hove should consider meeting the types of housing needed in the future by the current highly skilled residents of Brighton & Hove. Ultimately if housing aspirations cannot be met close by, these people will be increasingly forced to move further away which may impact on the ability to support jobs within Brighton & Hove.

Summary

4.17 Local authorities within Greater Brighton and Coastal West Sussex are collectively seeking to provide 30,520 dwellings over the next 10 years, which

is potentially lower than the level of housing growth required to meet identified demographic and economic growth needs.

- 4.18 An insufficient future supply of new housing could have significant housing market implications: worsening affordability pressures (which are already significant) may not make Greater Brighton and Coastal West Sussex an attractive location for lower earners, notably younger cohorts of the population, which in turn impacts the economy if Greater Brighton and Coastal West Sussex cannot retain or attract workers. It may also be harder to retain new graduates when they leave higher education, but also the housing choices of existing residents.
- 4.19 In this context, 35,998 dwellings are set out in trajectories developed by local authorities to be delivered by 2025. The trajectories imply a significant increase will be required in annual housing completion rates compared to past trends, on average 53% higher across Greater Brighton and Coastal West Sussex. The type, scale and timing of this supply is considered in more detail in the next section.

5.0

Delivering New Housing Supply

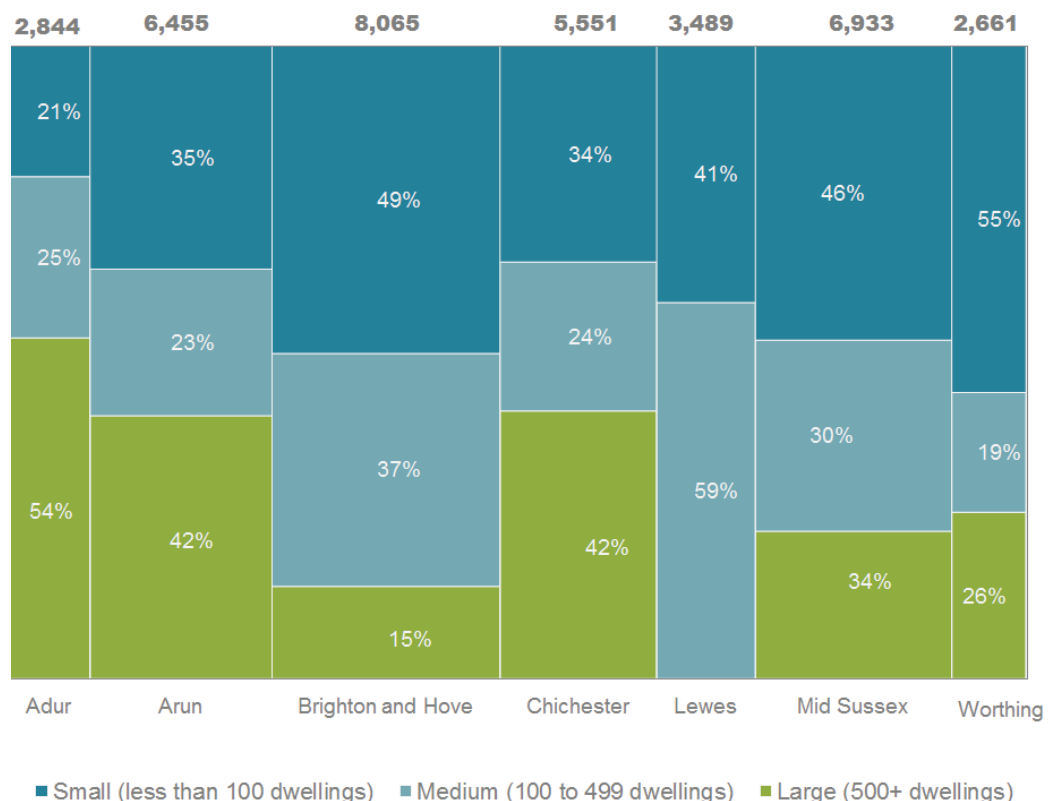
Authorities across Greater Brighton and Coastal West Sussex are currently planning to supply c.36,000 dwellings between 2015 and 2025. This section looks in more detail at the components of planned housing supply, notably the size of individual sites as well as factors relevant to their delivery.

Size Profile of Identified Housing Sites

5.1

The sites identified by local authorities within their housing trajectories have been broadly categorised in terms of, 'small' sites which amount to less than 100 units, 'medium' sites for between 100 and 499 units and 'large' sites which are set to deliver 500 or more units. As shown in Figure 5.1 below, this indicates that a fairly significant proportion of Greater Brighton and Coastal West Sussex planned supply of housing over the next decade is on large sites, with Adur, Arun and Chichester demonstrating the largest proportionate delivery on sites of this scale in Greater Brighton and Coastal West Sussex.

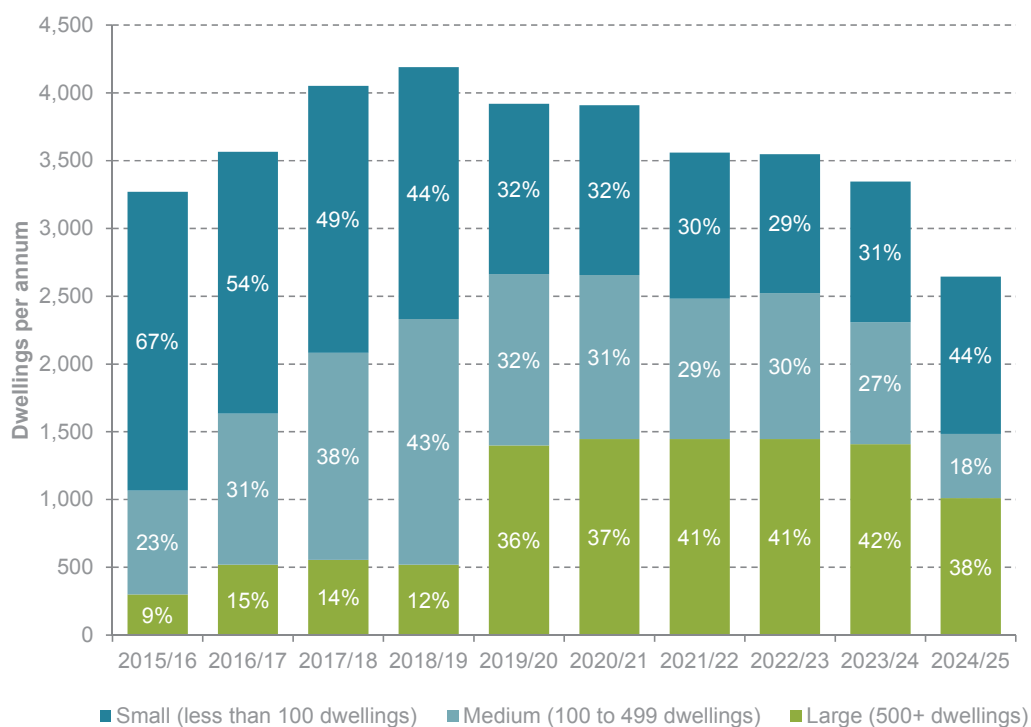
Figure 5.1 Total Housing Supply across Greater Brighton and Coastal West Sussex by Local Authority 2015 - 2025



Source: Local authority housing trajectories, SHLAA's and monitoring reports

5.2 Nearly 60%¹³ of planned future housing supply is on medium and large sites, with the majority focused in the eastern part of Greater Brighton and Coastal West Sussex. Figure 5.2 shows that delivery on medium and large sites increases considerably towards the latter end of the ten year period.

Figure 5.2 Components of Housing Supply across Greater Brighton and Coastal West Sussex 2015 - 2025



Source: Local authority housing trajectories, SHLAA's and monitoring reports

Delivery Factors

5.3 Although a high proportion of delivery on medium and large scale sites is not, in itself, a concern for the future delivery of housing in Greater Brighton and Coastal West Sussex, this profile will require a concerted effort to support delivery if this level of new supply is to be achieved over the next decade. This is particularly relevant because the projected delivery of housing across the Greater Brighton and Coastal West Sussex area requires a nearly 50% increase on the rate of housing completions achieved in recent years.

5.4 The perception that sites are 'oven-ready' may not always be reflected in reality. Significant work is required well before the first dwelling can be built on site, and it is not until this point that the site can count towards completions in the trajectory. An application on strategic scale sites can take many years and stages of applications to complete. Discharge of condition applications and site assembly works can extend the period even longer before any dwellings are actually under construction. Where major infrastructure is required to enable the delivery of the site the process can be lengthened further.

¹³ 58.97%

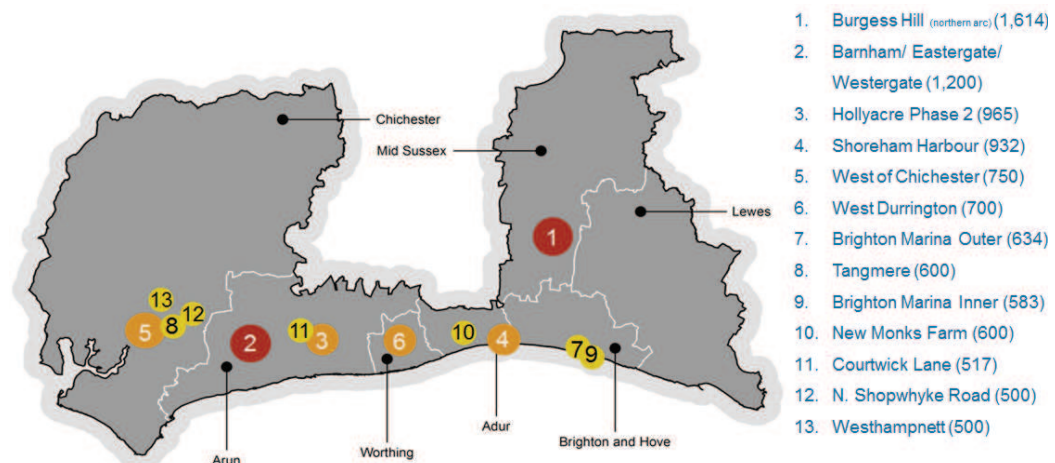
Why is it important to maintain realistic assumptions about delivery of larger sites?

- 5.5 If the delivery of a strategic site begins to slip away from its intended start date either through a longer planning period than expected (the time it takes between submitting a planning application and ultimately achieving the relevant consent) or delays to upfront works required, this leaves a gap in the trajectory at the local authority level to be filled. Not only does this delay delivery of new housing, but also can provide an opportunity for other housing developments to come forward in the interim particularly where an authority is unable to demonstrate a five-year housing land supply as required by the NPPF. In turn, these may impact on infrastructure capacity ahead of other planned housing developments.
- 5.6 To ensure delivery of these medium and large sites in a timely manner there is a need to engage with a wider range of developers/housebuilders in Greater Brighton and Coastal West Sussex, this will improve capacity and create competition to drive delivery of planned housing sites.

Site Specific Constraints to Housing Delivery

- 5.7 Figure 5.3 indicates the locations of the 13 sites in Greater Brighton and Coastal West Sussex which are projected to deliver the most housing between 2015 and 2025. The figures in Figure 5.3 do not relate to the total capacity of the sites, but just their projected delivery to 2025. All of these sites are projected to deliver 500 dwellings or more in the next ten years. The largest site is Burgess Hill (Northern Arc) in Mid Sussex which is projected to deliver 1,614 dwellings by 2025. The only other site projected to deliver more than 1,000 units by 2025 is the Barnham/Eastergate/Westergate site in Arun.

Figure 5.3 Large sites 500+ units in Greater Brighton and Coastal West Sussex 2015 - 2025



Source: NLP analysis

Note: The totals indicated may not reflect total site capacities, but the number of dwellings projected to be delivered between 2015 and 2025 only.

- 5.8 The greatest site specific constraints to the delivery of these large sites of 500 or more dwellings include works to 'A' roads, flood defences and improvements to Waste Water Treatment Facilities. Table 5.1 sets out the identified constraints to the delivery of each individual site under the categories 'Fewer Constraints', 'Some Constraints' and 'More Constraints'.
- 5.9 In January 2015, the Coast to Capital Local Enterprise Partnership (LEP) set out that as part of its Growth Deal with the Government, improvements to the A2300 Burgess Hill Link Road would be undertaken to unlock the delivery of up to 3,000 new homes and 5,000 jobs. As such, the delivery of the Burgess Hill site is now considered to have 'Fewer Constraints'. Other sites in this category have either already commenced development or do not have major constraints which it is considered will slow their delivery.
- 5.10 Sites with 'Some Constraints' are considered to have constraints which can be overcome. These include the improvement of flood defences and more minor road works including new junctions/accesses.
- 5.11 Those sites with 'More Constraints' are considered to require major infrastructure work for which there is not currently a finalised plan in place for their delivery, limiting the certainty of its delivery and therefore the certainty of the delivery of these schemes in accordance with the timescales set out. This includes expansion/upgrade of the Lidsey and Tangmere Waste Water Treatment Works (WWTW) as well as A29 realignment including a new bridge over a railway.

Table 5.1 Constraints to the delivery of large sites of 500+ units across Greater Brighton and Coastal West Sussex

Fewer Constraints	Some Constraints	More Constraints
<u>Burgess Hill</u> A2300 widening and new link road.	<u>Shoreham Harbour</u> Improving flood defences and access to and from the A27 and A259.	<u>Barnham/Eastergate/Westergate</u> A29 realignment including bridge over railway and upgrade to Lidsey Waste Water Treatment Works.
<u>Hollyacre Phase 2</u> Some/More constraints not identified.	<u>New Monks Farm</u> New access from the A27 and some flood risk issues.	<u>West of Chichester</u> Expansion of Tangmere Waste Water Treatment Works (WWTW).
<u>West Durrington</u> Approved and groundwork's have commenced.	<u>Brighton Marina (inner)</u> Landownership issues.	<u>Tangmere</u> Expansion of Tangmere WWTW.
<u>Courtwick Lane</u> Approved and delivering units.		<u>Westhampnett</u> Expansion of Tangmere WWTW.
<u>North of Shopwhyke Road</u> Outline permission approved but awaiting detailed planning permission.		
<u>Brighton Marina (outer)</u> Infrastructure improvements and flood defences needed, but not deemed unviable.		

Source: NLP analysis

Summary

- 5.12 In summary, nearly 60% of planned future housing supply in Greater Brighton and Coastal West Sussex is on medium and large sites, with a significant proportion of this supply coming forward in the latter years of the ten year period 2015 to 2025.
- 5.13 Large sites can have significant lead in times between being identified and actually delivering dwellings on site, and may be reliant on addressing constraints or new infrastructure delivery. As such it is important for Greater Brighton and Coastal West Sussex to ensure that any constraints or other pre-requisites to the delivery of these sites are addressed early so that any delays in delivery can be mitigated.
- 5.14 It is important for local authorities within Greater Brighton and Coastal West Sussex to work towards overcoming these constraints because, as set out above, when the timescales for strategic sites begin to slip, the local planning authority can end up having to accept forms of development they do not wish to, either through an application or at appeal, when a five year supply of housing land cannot be demonstrated. To achieve the delivery of housing as planned, it is imperative to ensure constraints to delivery are overcome in a timely manner.

6.0

Future Opportunities for Action

This section draws together the implications from the preceding analysis to identify future opportunities and actions in support of promoting long-term sustainable growth across Greater Brighton and Coastal West Sussex with particular reference to the delivery of housing.

Exploring Long-Term Opportunities to Meet Unmet Housing Needs

- 6.1 As noted in section 4.0, local planning authorities across Greater Brighton and Coastal West Sussex are currently planning for c. 36,000 dwellings over the period 2015-2025. Evidence contained within existing Strategic Housing Market Assessments and related studies indicates that future housing needs may be higher taking into account demographic and economic growth factors across Greater Brighton and Coastal West Sussex. These figures exclude the South Downs National Park Authority which will set a housing requirement as part of Preferred Options consultation later in 2015 which will also contribute to meeting future housing needs.
- 6.2 Local authorities within Greater Brighton and Coastal West Sussex will need to continue and further develop discussions under the auspices of the duty-to-cooperate to explore long-term opportunities to meet unmet housing needs. This may include considering options for developing an over-arching spatial framework to guide future delivery. These discussions will need to take account of the position within the GBCWS area but also potential to explore opportunities with neighbouring authorities outside of the area.

Widening the Choice of Housing Supply

- 6.3 There is a need to consider what types of housing should be delivered within the Greater Brighton and Coastal West Sussex area. Analysis has identified that Brighton & Hove has significant affordability issues as well as the greatest proportion of private renters in the Greater Brighton and Coastal West Sussex area. There is a strong pattern of young working age people moving into Brighton & Hove from outside of the Greater Brighton and Coastal West Sussex boundary (a significant proportion of which come from Greater London), but internal migration patterns show that they do not tend to stay in Brighton & Hove.
- 6.4 There is an established link between an increase in the housing supply and an improvement in affordability. As such, affordability can be improved to some degree through the provision of a greater supply of housing. There will likely also be a need for initiatives to aid affordability pressures which are related to housing strategy more generally. For example, Brighton & Hove's Housing Strategy 2015¹⁵ states that it will prioritise support for new housing

¹⁵ <http://www.brighton-hove.gov.uk/content/housing/general-housing/housing-strategy-2015>

development that delivers a housing mix the City needs with a particular emphasis on family, increase housing supply through the conversion of unused and unneeded properties and support buildings and higher density development in appropriate locations of the City.

- 6.5 Prioritising housing development which meets the needs of certain types of housing, maximising densities and bringing properties back into use are important in maximising the potential supply of constrained authorities. In addition, an increase in affordable housing provision on schemes (whilst still being viable) might also be considered to aid affordability pressures.
- 6.6 Analysis of both stock in Greater Brighton and Coastal West Sussex and Experian Mosaic categorisation at ward level shows that Brighton & Hove has a lesser proportion of houses in its stock compared to the rest of Greater Brighton and Coastal West Sussex, but has comparatively more flats. Furthermore, the Experian Mosaic data indicates that when young highly skilled workers move onto the next housing stage in their lives (e.g. seeking a family home), they have to move to the outskirts of Brighton & Hove and beyond to do this. As such, the type and location of housing that is delivered, supported by access to both car and non-car transport modes, is important to retain highly skilled workers close to their place of employment.
- 6.7 Analysing the types of housing needs from constrained locations is important for adjoining authorities who may be able to specify the types of units required to assist in providing for a broader range of housing choices within Greater Brighton and Coastal West Sussex. This would likely be easiest to do on strategic sites whereby there is sufficient scale to allow for a mix of house types, and where transport options can be developed which maximise the potential for both car and non-car journeys (e.g. pump priming bus connections between major employment hubs and housing).
- 6.8 In addition, although it is generally easier to provide specific types of housing when a local authority has a greater housing requirement, there is no reason why even more constrained authorities cannot introduce measures through their housing strategies to broaden new housing supply.

Ensuring Early Delivery of Sites

- 6.9 A significant proportion of Greater Brighton and Coastal West Sussex's planned future housing supply is on medium and large sites. Although this is not necessarily a problem in itself, large sites have significant lead in times between being identified and actually delivering dwellings on site and tend to have to overcome constraints to delivery. It is important for Greater Brighton and Coastal West Sussex to ensure that any constraints to the delivery of these sites are dealt with early so that any delays in delivery can be mitigated.
- 6.10 This is particularly relevant because the projected delivery of housing across the Greater Brighton and Coastal West Sussex area is ambitious; this quantum of housing delivery would require a circa 50% increase on past completion rates across the area.

- 6.11 As far as is practical on behalf of the local planning authorities, it is beneficial to ensure the strategic sites delivering at their projected rates that the need for any technical evidence or the delivery of major infrastructure, including necessary funding, is in place as early as possible. To ensure that all of these factors remain on track with the projected delivery of these strategic sites, it may be helpful to identify dedicated resources to support delivery of strategic sites and other key development areas and to help co-ordinate the process. The Burgess Hill Development Board established in 2015 (and its predecessor Steering Group established in 2006) is an example of a strategic initiative already underway to set priorities, co-ordinate projects and funding, and to monitor progress.
- 6.12 Even if every effort is made on behalf of the local authority to ensure the delivery of strategic sites happens as quickly as possible, these sites will have long planning periods including conditions to discharge and site enabling works. If a strategic site does not deliver as quickly as is projected, local authorities should consider if there is a supply of smaller sites in the trajectory to 'fill the gap' in the event of a delay. For some local authorities this may mean identifying more small or medium sites in their trajectories to allow for this eventuality.
- 6.13 One of the advantages of a significant proportion of future housing provision being delivered on strategic sites is that the larger scale of development provides the opportunity to put in place up-front infrastructure in a coordinated and phased way, including scope for public sector investment. This is particularly important in respect of potential improvements to the transport network that can help improve the connections between new strategic sites (as noted earlier, many are in more peripheral locations) and existing centres of employment and services. For example, this might allow for additional bus services or increased frequency on some existing routes due to higher patronage. Authorities and transport planning bodies should ensure that opportunities to work with developers of strategic sites to provide new or improved public transport provision are explored in order to improve connectivity by non-car modes for residents commuting within Greater Brighton & Coastal West Sussex.

Engaging with Developers and Investors

- 6.14 A further way of increasing delivery of planned supply could be undertaken through engagement with a wider range of developers and house builders who operate both within and outside of Greater Brighton and Coastal West Sussex. Such measures could help to encourage delivery of stalled sites and improve capacity to help support delivery.
- 6.15 Local authorities could consider compiling a number of Council-owned sites within the local authority into a portfolio which could be delivered through a public/private sector partnership (e.g. through Joint Ventures or a Local Asset Backed Vehicle).

Opportunities and Actions

- 6.16 Table 6.1 overleaf draws together the strategy elements outlined above and identifies specific opportunities and actions for each. These are also considered in terms of the extent to which they would potentially deliver improved outcomes against each of the overall themes considered in this paper.

Table 6.1 Potential Opportunities to Support the Delivery of Housing Needs

Strategy element	Opportunities and actions	Relevant Themes		
		1: A Growing and Mobile Population	2: Meeting Future Housing Requirements	3: Delivering New Housing Supply
1. Explore long-term opportunities to meet unmet housing needs	<ul style="list-style-type: none"> Continue and develop duty to cooperate discussions to explore long-term opportunities to meet unmet housing needs Consider options for developing an over-arching spatial framework to guide future delivery Explore opportunities with local planning authorities outside of the GBCWS boundary 	X	XX	X
2. Widening the choice of housing supply	<ul style="list-style-type: none"> Analyse the housing needs of those unable to meet their housing choices in constrained locations Consider the potential to broaden the range of stock and tenure on strategic sites in conjunction with pump-priming of new public transport provision (e.g. more frequent bus connections) Although it is easier to widen types of supply when there is greater physical capacity, opportunities to specify the types of housing to be delivered even in constrained authorities should be considered 	XX	X	X
3. Ensuring early delivery of housing sites in GBCWS	<ul style="list-style-type: none"> Put in place measures to necessitate technical evidence to improve prospects of projected delivery rates being achieved Increase delivery coming from smaller sites should the delivery of strategic sites take longer than currently projected Work either alone or with developers to ensure that major infrastructure/other constraints are delivered at the earliest opportunity. This may include identifying funding. Potential to identify dedicated resources to support delivery of strategic sites and key development areas to help co-ordinate the process (linked to 4 below) 	X	X	XX
4. Engaging with developers and investors to help support delivery	<ul style="list-style-type: none"> Engage with a wider range of investors and developers within and outside of the region to encourage delivery of stalled sites and improve capacity to help support delivery Explore potential scope for public private sector partnerships to deliver portfolios of smaller sites (e.g. joint ventures, Local Asset Backed Vehicles) 		X	XX

Source: NLP analysis

6.17

The above potential opportunities to support the delivery of housing needs are broadly applicable to all of the local authorities within Greater Brighton and Coastal West Sussex, with the exception of element 2 which has different opportunities and actions for Greater Brighton and Coastal West Sussex. It is

more appropriate for the local authorities within Greater Brighton to analyse how the housing choices of those from Brighton & Hove can be accommodated in a complementary way to the City. This would include providing the types of accommodation that people living in Brighton & Hove might seek to aspire to in the future, but are currently less able to access in the City.

6.18

This is not to preclude consideration of the same issue within the wider Coastal West Sussex area. However, the relative distances and east-west transport connectivity from Greater Brighton to Arun and Chichester (and the implied journey times for people commuting back into Brighton for employment), means that the focus is likely to be within Greater Brighton in the first instance.

Appendix 1 Local Authority Housing Trajectories (at April 2015)

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	Total
Adur											
windfalls	0	0	32	32	32	32	32	32	32	32	256
<6	23	15	3	0	0	0	0	0	0	0	41
up to 49	22	39	29	29	0	0	0	0	0	0	119
50-99	24	24	24	24	38	37	0	0	0	0	171
100-199	0	172	40	33	0	0	0	0	0	0	245
200-299	0	0	0	0	0	0	0	0	0	0	0
300-399	0	0	0	0	0	0	0	0	0	0	0
400-499	0	0	25	80	80	80	80	80	55	0	480
500-599	0	0	0	0	0	0	0	0	0	0	0
600-699	0	40	75	75	75	75	75	75	75	35	600
700-799	0	0	0	0	0	0	0	0	0	0	0
800-899	0	0	0	0	0	0	0	0	0	0	0
900-999	0	35	35	0	165	165	165	165	165	37	932
1000+	0	0	0	0	0	0	0	0	0	0	0
Totals	69	325	263	273	390	389	352	352	327	104	2,844
Arun											
windfalls	16	42	78	89	91	91	91	91	91	91	771
<6	1	1	1	1	0	0	0	0	0	5	9
up to 49	152	152	152	152	28	28	28	28	28	55	802
50-99	121	121	121	121	40	40	40	40	40	7	694
100-199	61	61	91	91	99	114	129	129	129	34	934
200-299	111	111	111	111	24	24	24	24	24	0	563
300-399	0	0	0	0	0	0	0	0	0	0	0
400-499	0	0	0	0	0	0	0	0	0	0	0
500-599	64	64	64	64	52	52	52	52	52	0	517
600-699	0	0	0	0	0	0	0	0	0	0	0
700-799	0	0	0	0	0	0	0	0	0	0	0
800-899	0	0	0	0	0	0	0	0	0	0	0
900-999	66	66	66	66	126	126	126	126	126	73	965
1000+	0	0	0	0	200	200	200	200	200	200	1,200
Totals	591	617	683	694	660	675	690	690	690	464	6,455

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	Total
Brighton & Hove											
windfalls	48	48	48	48	100	100	100	100	100	85	777
<6	53	53	53	53	0	0	0	0	0	182	393
up to 49	441	154	177	197	144	126	127	121	138	196	1,817
50-99	35	185	175	130	50	75	105	100	65	10	930
100-199	0	116	146	125	100	100	100	100	100	65	952
200-299	0	0	0	0	120	120	120	120	120	30	630
300-399	0	20	120	120	120	120	120	120	120	80	940
400-499	0	0	0	50	70	70	70	70	70	50	450
500-599	0	0	0	0	50	100	100	100	100	92	542
600-699	50	50	50	50	80	80	80	80	80	34	634
700-799	0	0	0	0	0	0	0	0	0	0	0
800-899	0	0	0	0	0	0	0	0	0	0	0
900-999	0	0	0	0	0	0	0	0	0	0	0
1000+	0	0	0	0	0	0	0	0	0	0	0
Totals	626	625	768	772	834	891	922	911	893	824	8,065
Chichester											
windfalls	1	15	40	48	48	48	48	48	48	48	392
<6	55	34	8	0	0	0	0	0	0	0	97
up to 49	406	163	67	37	80	78	42	42	42	41	998
50-99	0	109	169	105	26	0	0	0	0	0	409
100-199	96	143	150	127	10	0	0	0	0	0	526
200-299	0	0	0	0	0	0	0	0	0	0	0
300-399	0	0	50	50	75	75	60	50	0	0	360
400-499	68	54	50	50	50	50	50	47	0	0	419
500-599	20	65	65	65	165	165	165	165	125	0	1000
600-699	0	0	0	0	100	100	100	100	100	100	600
700-799	0	0	0	0	125	125	125	125	125	125	750
800-899	0	0	0	0	0	0	0	0	0	0	0
900-999	0	0	0	0	0	0	0	0	0	0	0
1000+	0	0	0	0	0	0	0	0	0	0	0
Totals	646	583	599	482	679	641	590	577	440	314	5,551
Lewes											
windfalls	37	37	37	37	37	37	37	37	37	37	370
<6	25	25	25	25	25	0	0	0	0	0	125
up to 49	83	135	140	56	45	74	30	15	15	13	606
50-99	30	52	50	60	31	19	19	18	17	17	313

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	Total
100-199	0	50	147	201	71	50	50	83	102	80	834
200-299	0	0	0	0	0	45	44	44	44	43	220
300-399	0	0	80	255	222	136	102	123	52	51	1021
400-499	0	0	0	0	0	0	0	0	0	0	0
500-599	0	0	0	0	0	0	0	0	0	0	0
600-699	0	0	0	0	0	0	0	0	0	0	0
700-799	0	0	0	0	0	0	0	0	0	0	0
800-899	0	0	0	0	0	0	0	0	0	0	0
900-999	0	0	0	0	0	0	0	0	0	0	0
1000+	0	0	0	0	0	0	0	0	0	0	0
Totals	175	299	479	634	431	361	282	320	267	241	3,489
Mid Sussex											
windfalls	0	0	0	0	0	0	0	0	0	0	0
<6	0	0	0	0	0	0	0	0	0	0	0
up to 49	0	0	0	0	0	0	0	0	0	21	21
50-99	399	399	421	421	273	273	273	273	268	201	3201
100-199	153	153	153	153	0	0	0	0	0	0	612
200-299	0	0	0	0	0	0	0	0	0	0	0
300-399	135	135	135	135	85	85	85	85	85	40	1005
400-499	0	100	100	100	90	90	0	0	0	0	480
500-599	0	0	0	0	0	0	0	0	0	0	0
600-699	0	0	0	0	0	0	0	0	0	0	0
700-799	0	0	0	0	0	0	0	0	0	0	0
800-899	0	0	0	0	0	0	0	0	0	0	0
900-999	0	0	0	0	0	0	0	0	0	0	0
1000+	0	0	0	0	260	260	260	260	260	314	1614
Totals	687	787	809	809	708	708	618	618	613	576	6,933
Worthing											
windfalls	0	0	81	81	81	81	81	81	81	81	648
<6	51	34	7	0	0	0	0	0	0	0	92
up to 49	180	95	31	62	20	29	0	0	0	0	417
50-99	0	0	0	50	65	85	25	0	35	40	300
100-199	144	0	0	0	50	50	0	0	0	0	244
200-299	0	0	130	130	0	0	0	0	0	0	260
300-399	0	0	0	0	0	0	0	0	0	0	0
400-499	0	0	0	0	0	0	0	0	0	0	0
500-599	0	0	0	0	0	0	0	0	0	0	0

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	Total
600-699	0	0	0	0	0	0	0	0	0	0	0
700-799	100	200	200	200	0	0	0	0	0	0	700
800-899	0	0	0	0	0	0	0	0	0	0	0
900-999	0	0	0	0	0	0	0	0	0	0	0
1000+	0	0	0	0	0	0	0	0	0	0	0
Totals	475	329	449	523	216	245	106	81	116	121	2,661

Source: Individual local authorities / NLP analysis



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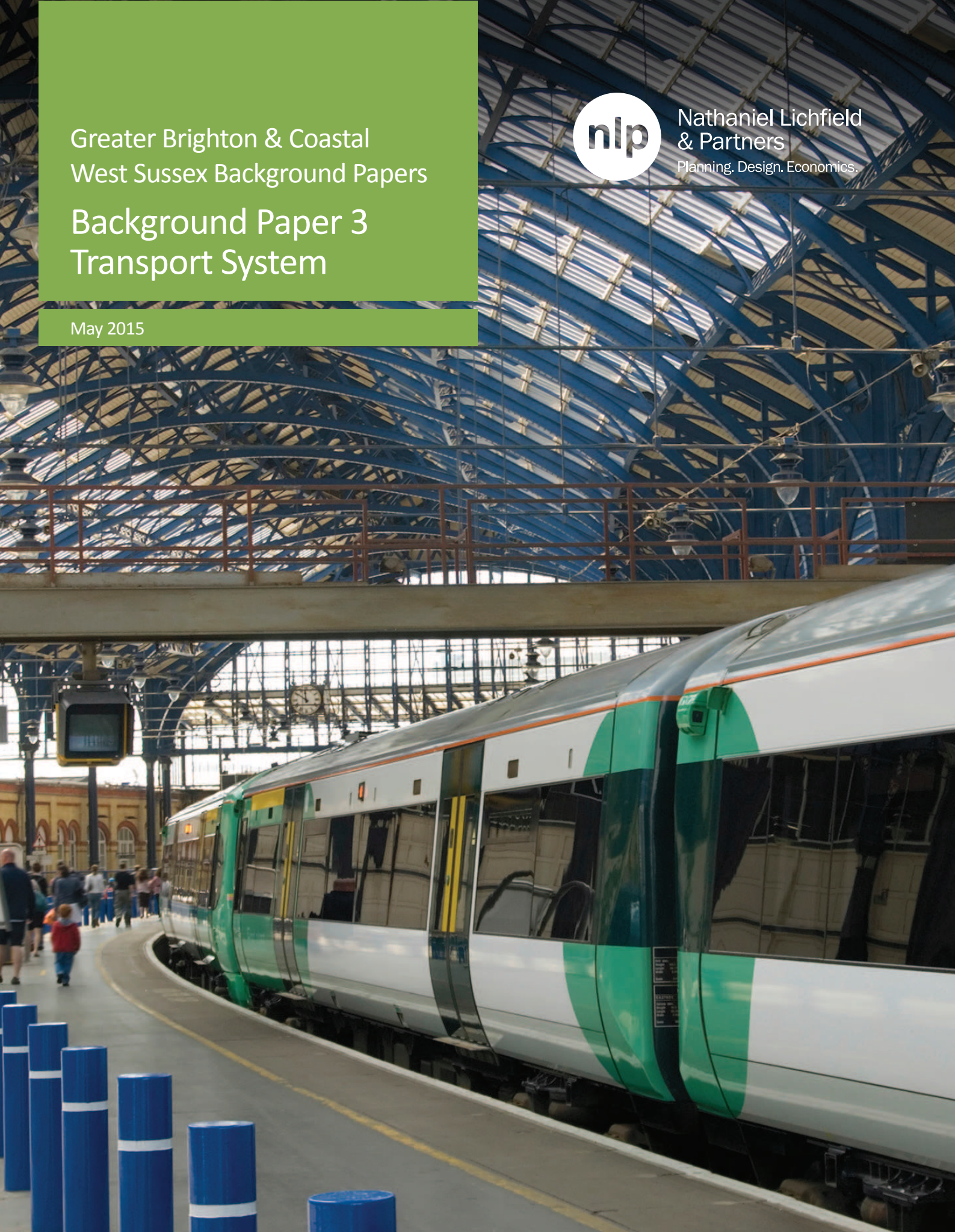
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Greater Brighton & Coastal West Sussex Background Papers Background Paper 3 Transport System

May 2015



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**Greater Brighton & Coastal West
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Background Paper 3 - Transport System

In association with



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Introduction

1.0

1.1 The Greater Brighton Economic Board ('the Economic Board'), working in partnership with the Coastal West Sussex and Greater Brighton Strategic Planning Board ('the Strategic Planning Board'), commissioned a series of background papers to provide evidence and inform future decision-making for the Greater Brighton and wider Coastal West Sussex area ('GBCWS').

1.2 The three background papers focus on:

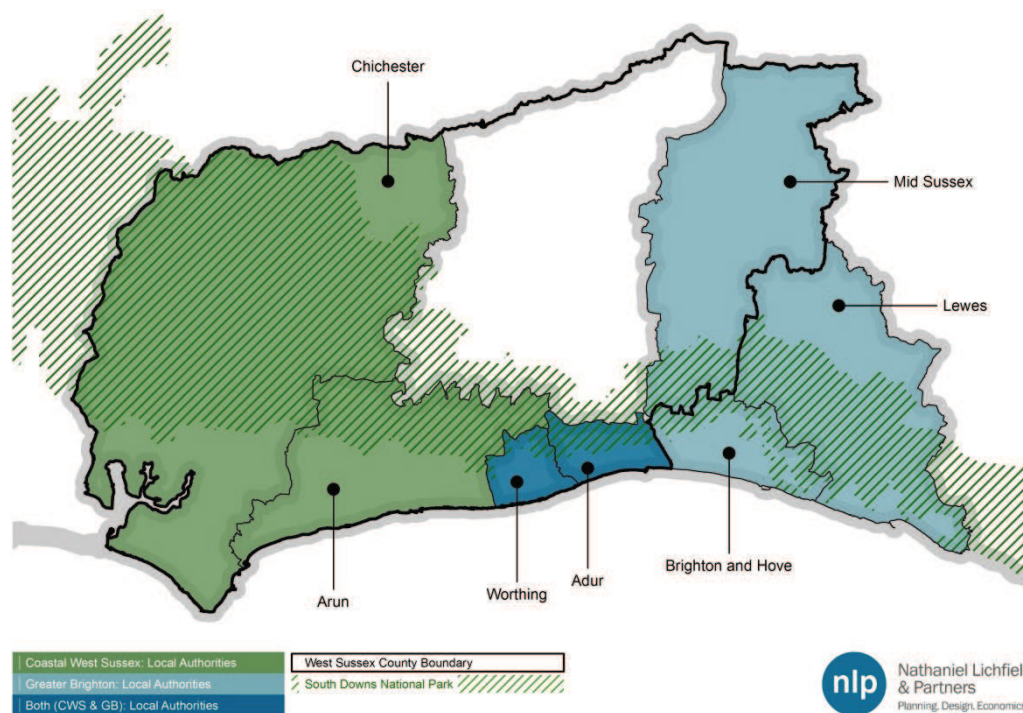
- 1 Economy
- 2 Housing Market
- 3 **Transport System (this paper)**

1.3 The papers have been developed by Nathaniel Lichfield & Partners ('NLP') in association with Interfleet Transport Advisory ('ITA'). An overarching Executive Summary has also been produced to accompany the individual papers.

Background

1.4 Greater Brighton and Coastal West Sussex together comprise seven local authorities and parts of the South Downs National Park Authority (SDNPA) as shown in Figure 1.1. '**Greater Brighton**' includes Brighton & Hove, Adur & Worthing, Lewes and Mid Sussex. '**Coastal West Sussex**' refers to Adur & Worthing, Arun and Chichester. It should be noted that Adur & Worthing are included within both geographies.

Figure 1.1 Spatial Definition of Greater Brighton and Coastal West Sussex



- 1.5 The **Greater Brighton Economic Board** was established in March 2014 to bring together city region leaders, business partners, universities, further education partners and the Coast to Capital Local Enterprise Partnership (LEP) to unlock barriers to the economic prosperity of the Greater Brighton City Region. The Board has been formally recognised by Government and forms a key aspect of the LEP's distributed governance and accountability structure for the delivery of the LEP's Strategic Economic Plan and Growth Deal.¹
- 1.6 The Local Planning Authorities within the Coastal West Sussex and Greater Brighton area formed the **Coastal West Sussex and Greater Brighton Strategic Planning Board** to identify and manage spatial planning issues that impact on more than one area, and support better integration and alignment of spatial and investment priorities.²

Purpose of the Background Papers

- 1.7 The brief for the project identifies that achieving long term sustainable growth across Greater Brighton and the wider Coastal West Sussex area will depend on addressing key strategic issues – notably employment land, housing, transport and other infrastructure – in an integrated and deliverable way.
- 1.8 At the 29 July 2014 meeting, the Economic Board agreed that three background papers should be commissioned which aim to support the Board to develop a greater understanding of the Greater Brighton and the wider Coastal West Sussex area around the three themes of economy, housing market and transport system.
- 1.9 Concurrent to this, the Strategic Planning Board is in the process of refreshing its Local Strategic Statement (LSS)³ which sets out long term strategic planning and investment priorities for an overlapping (although not contiguous) geography. It is the intention that a new Coastal West Sussex and Greater Brighton Local Strategic Statement will be prepared jointly with the Economic Board (under the auspices of the Officer Programme Board). This will draw upon the background papers to define priorities for the period 2015-2025, and support future funding bids and Local Plans through helping to facilitate meeting the Duty to Cooperate.

Structure of the Paper

- 1.10 The remainder of this paper is structured as follows:
- Section 2.0 outlines the **approach and methodology**.
 - Section 3.0 examines the role of transport in providing **access to labour markets** across the region.

¹ Greater Brighton City Deal, Deputy Prime Minister's Office, 12 March 2014, <https://www.gov.uk/government/publications/city-deal-greater-brighton>

² The Strategic Planning Board comprises Adur and Worthing, Arun, Brighton & Hove, Chichester, Lewes, Mid Sussex, West Sussex County Council and the South Downs National Park Authority.

³ Local Strategic Statement, October 2013, <http://www.coastalwestsussex.org.uk/wp-content/uploads/FINAL-Signed-LSS-for-CWS-Gtr-Brighton-30-Jan-14.pdf>

- Section 4.0 explores how transport gaps may constrain **access to markets and services** including non-work related trips.
- Section 5.0 considers the role of non-car modes and how **increasing sustainable transport options can create capacity** to accommodate economic growth.
- Section 6.0 draws together the thematic analysis to identify **potential opportunities and actions**.

2.0

Approach and Methodology

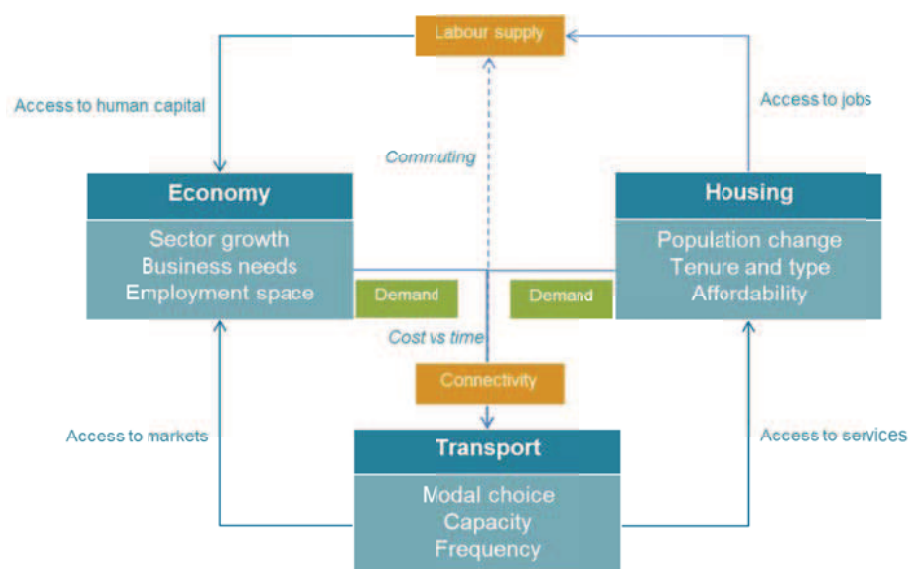
This section details the approach and methodology adopted by NLP and ITA for the purposes of preparing each of the background papers.

Approach

- 2.1 As noted in section 1.0, the purpose of the background papers is to help stakeholders within Greater Brighton and Coastal West Sussex consider how addressing strategic issues relating to the economy, housing market and transport can help achieve “*long-term sustainable growth*” for the area.
- 2.2 This analysis is being undertaken against the backdrop of significant change within the global economy, with a shift towards knowledge-based goods and services as the main drivers of productivity and economic growth. There is an increasing focus on innovation, flexibility and rapid adaptation to change so that economic assets can be used most efficiently and effectively (particularly in the context of competing locations).
- 2.3 Markets tend to operate across administrative geographies, and there has been recent attention on assessing needs across functional economic market areas.⁴ Sub-regions and greater metropolitan areas are identified as drivers of growth because of their role supporting clusters and agglomeration economies. The geographic proximity of economic assets and infrastructure can increase productivity through sustaining high-growth sectors and innovation, whilst the presence of universities and urban amenities tends to attract higher skilled workers and support new business creation.
- 2.4 This means growth of wider sub-regions is highly inter-dependent because they access shared labour and housing markets, transport networks and commuting patterns, and proximity to large institutions such as universities. Figure 2.1 outlines some of these inter-relationships to examine the role of the economy, housing market and transport system as drivers of economic growth:
- Economy – the scale and concentration of businesses and sectors, and particularly the extent to which clusters of related or complementary activities can drive support innovation and new business creation;
 - Housing market – a major determinant of access to labour supply and human capital that supports economic growth, but also as a source of demand for goods and services;
 - Transport system – transport is critical to determining the relative physical connectivity between businesses, suppliers, workers and consumers, and the costs, time and reliability of these connections.

⁴ See for example Planning Practice Guidance, paragraph 13

Figure 1.2 Inter-relationships between Economy, Housing and Transport Drivers of Growth



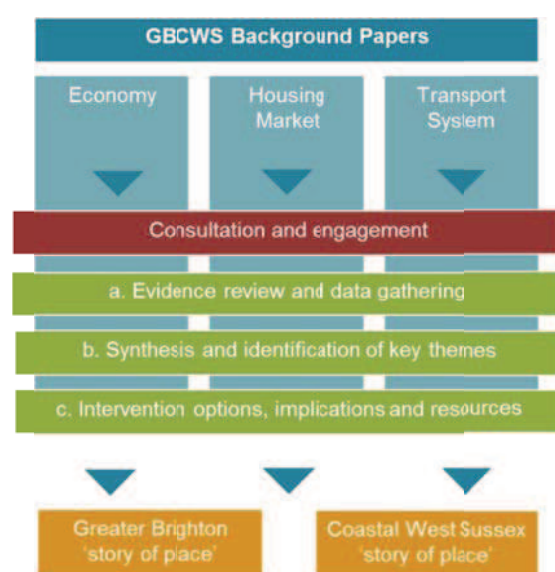
Source: NLP/ITA analysis

- 2.5 In combination, these drivers are major determinants of long-term growth. Analysing the local assets and dynamics related to each, as well as their interactions with each other, provides a basis for identifying actions and developing strategies that will help support an integrated approach to supporting long-term growth.

Methodology

- 2.6 The process for preparing the background papers has followed a three-stage methodology as set out in Figure 2.2, informed by stakeholder consultation and engagement at a number of stages.

Figure 1.3 Outline Approach for Background Papers



Source: NLP

a. Evidence review and data gathering

- 2.7 The preparation of the background papers has been underpinned by a series of key questions for the purposes of interrogating each of the economy, housing market and transport system topic areas:
- Economy: How big is the economy? What are the key sectors? How is the economy changing? What is the growth potential of the area? What is the skills profile of the area's labour force?
 - Housing market: How is the housing market area defined? What are the migration patterns within and without the area? How do house prices and affordability ratios vary across the area? What is the planned future supply of housing across the area?
 - Transport system: Where do people travel to work outside of the area? Where do people travel within the area? How do people travel, and how has this changed? What are the known transport constraints? Where is transport investment proposed?
- 2.8 The analysis draws upon existing evidence prepared at local authority, county and Local Enterprise Partnership scales supplemented by latest national datasets where available. It should be noted that this is not necessarily an exhaustive literature review but is based on a filtering of the existing evidence of most relevance to the analysis at the strategic level.
- 2.9 An important consideration for any work of this type is that it is inevitably a point-in-time assessment. This study has incorporated the latest data and other evidence available at the point of preparation. The accuracy and sources of data derived from third party sources have not been checked or verified by NLP or ITA.

b. Synthesis and identification of key themes

- 2.10 This stage involved drawing together the existing research alongside new analysis to identify a number of key 'themes' for the purposes of considering the dynamics of both Greater Brighton and Coastal West Sussex and the future growth potential of these areas individually and on a combined basis.
- 2.11 These themes have emerged from consideration of the economic position and potential of the area, and the factors most relevant to its economic performance. Across each topic this included an assessment of:
- the key features of Greater Brighton and Coastal West Sussex and the factors and trends that have influenced the area's position today;
 - what strengths have driven the area's past economic success (including whether they will continue in the future) and what weaknesses or barriers challenge the area's economic success (and whether these challenges/barriers are likely to worsen or improve in the future);

- the inter-relationships between the Greater Brighton and Coastal West Sussex and their wider hinterland, in order to understand how these could affect the economic performance of the area and how this could change in the future.

c. Intervention options, implications and resources

- 2.12 From the review of key themes, the relevant intervention options, implications and resources have been identified. This involves describing potential economic growth ambitions for Greater Brighton and Coastal West Sussex and the priorities for action that might be required to deliver them. These relate to areas where there is a potential role for public sector intervention to address market failures or to leverage resources to help support sustainable growth, through to broader advocacy of an integrated approach to strategy on the economy, housing and transport.
- 2.13 An important consideration is that Greater Brighton and Coastal West Sussex do not function in isolation from surrounding areas, and these wider relationships are relevant to all of the economy, housing market and transport themes. It should therefore be noted that, while the analysis focuses on Greater Brighton and Coastal West Sussex, factors arising from adjoining areas will also be relevant. This is particularly in the context of the future growth potential of areas including the Gatwick Diamond, South Hampshire and Greater London.
- 2.14 It should be noted that the evidence, analysis and implications set out within the three papers do not take account of any future decisions by national Government regarding a potential second runway at Gatwick Airport, a decision on which is currently anticipated in 2015.

Consultation and Engagement

- 2.15 Across each of the stages, consultation and engagement has been undertaken with a range of stakeholders from across Greater Brighton and Coastal West Sussex. Those consulted included relevant offices within each of the local authorities, including specialists within economic development, housing, planning policy and transport.
- 2.16 This consultation process was designed to ensure that each of the background papers benefited from access to latest evidence and data but also from qualitative inputs from relevant experts. Consultation took place through a number of formats, including presentations to Board and Officer Group meetings, roundtable discussions at a stakeholder workshop held in Worthing in February 2015, as well as some individual interviews. In addition, this work was coordinated through a Steering Group comprising representatives of the Economic Board and Strategic Planning Board.

3.0

Access to Labour Markets

Transport networks support the productivity and success of urban areas and their catchments, by getting people to work, supporting deep and productive labour markets and allowing businesses within the area to reap the benefits of agglomeration.⁵

3.1

Within the study region Brighton & Hove and Chichester are the principal employment centres and have grown significantly faster than the area average since 2001 (approximately 10% above the Greater Brighton City Region average of 15%). Outside of the study region, Gatwick/Crawley and London have become increasingly important as employment destinations. It is expected that around 57,000 jobs will be created in the Greater Brighton and Coastal West Sussex area up to 2031 with a continued focus on Brighton & Hove, Chichester and Mid-Sussex.

Table 3.1 Employment Forecasts to 2031

Local authority	Share of growth	No of Jobs
Brighton & Hove	28.8%	16,440
Chichester	20.2%	11,540
Mid Sussex	18.3%	10,425
Arun	13.4%	7,830
Worthing	10.5%	5,970
Lewes	5.0%	2,830
Adur	3.8%	2,220

Source: Experian / NLP analysis

3.2

Improving access between workers and jobs will have productivity benefits for firms who can access a larger potential workforce with a deeper set of skills. It also has benefits for those seeking employment or looking to progress their careers, through a wider choice of job opportunities.

3.3

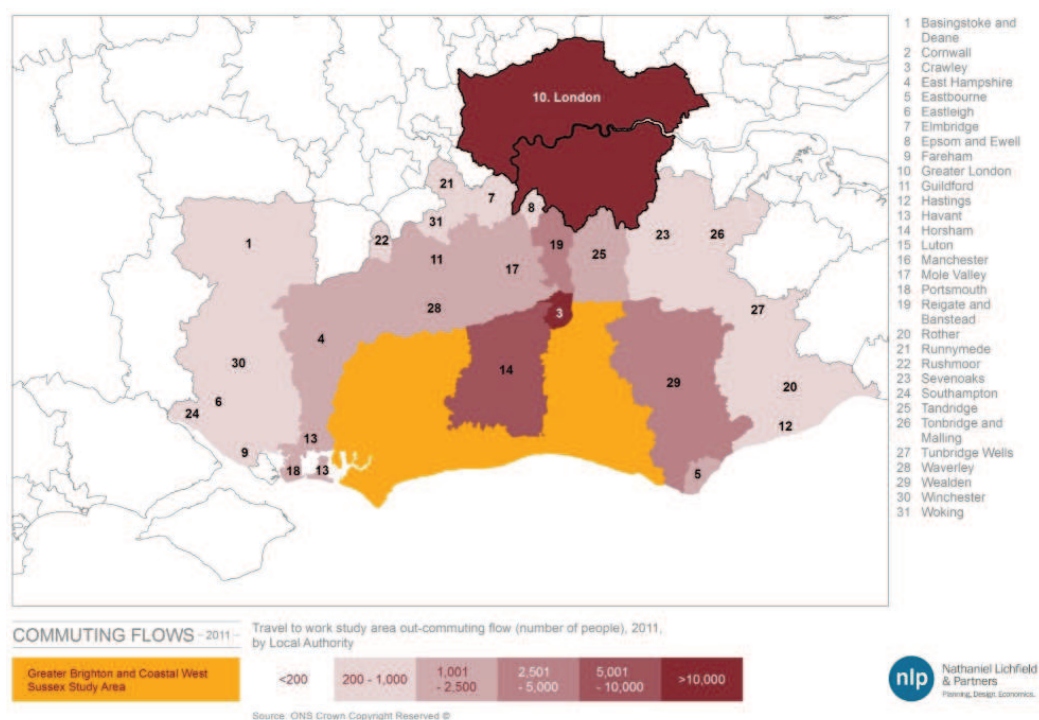
As such the challenge is for those “successful” areas to spread the positive benefits of employment growth by expanding access across more of the Greater Brighton and Coastal West Sussex area. In turn, wages from higher value jobs will be spent across the broader area, leading to local multiplier effects.

3.4

The 2011 Census journey to work data supports this assessment with respect to jobs locations and reveals two key dynamics at play: over 35,000 daily journeys between the region and Gatwick/Crawley and Central London showing a reliance on the north-south links; and significant journeys into Brighton & Hove and Chichester. For example, 32% of Lewes based workers and 33% of Adur workers commute to Brighton & Hove.

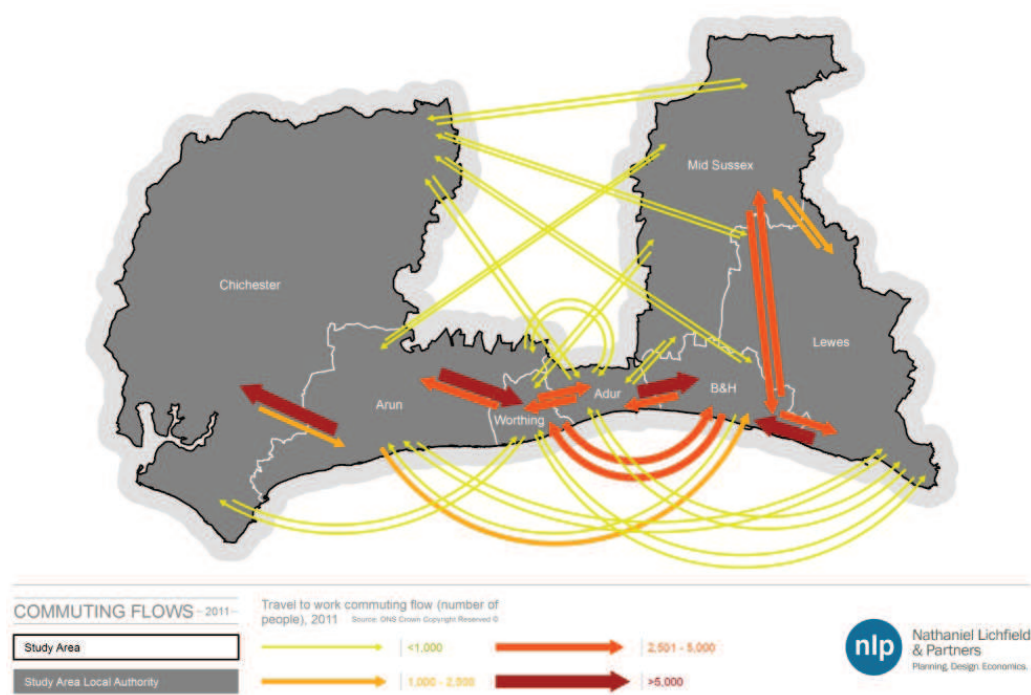
⁵ A key finding of The Eddington Transport Study, Rod Eddington, December 2006

Figure 3.1 Out-Commuting Flows from the Region, 2011



Source: 2011 Census / NLP analysis

Figure 3.2 Internal Commuting Flows in the Region, 2011



Source: 2011 Census / NLP analysis

3.5

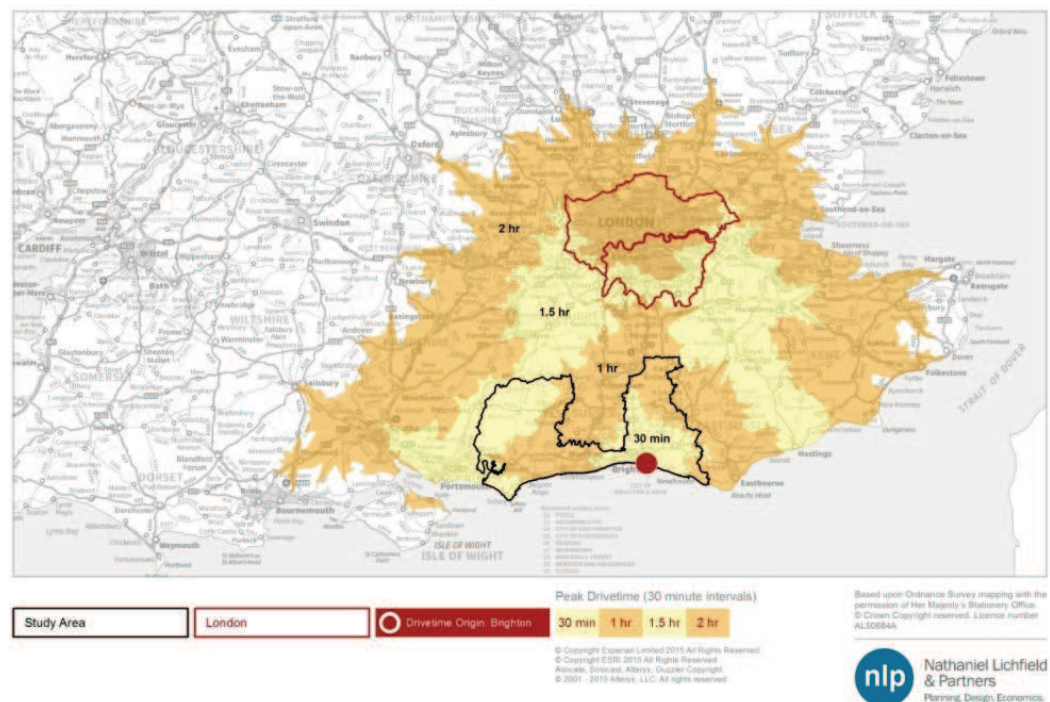
Most journey to work trips within the Greater Brighton and Coastal West Sussex Region are local – either within individual districts (55% of all workers in 2011 and in Chichester a notable 88%) or between neighbouring districts.

This may in part reflect choice: living close to work/working close to home but also may reflect a relative lack of accessibility beyond immediate districts.

3.6 When considering access to labour catchment areas it is helpful to use isochrones as an indicator. These reflect the distance one can travel to/from a specific node in peak and off peak conditions. The figures below show road accessibility to the two city centres within the study area, which highlights the important role of the A27.

3.7 During the peak, the 60 minute drivetime band to the west of central Brighton & Hove can be as close as Worthing, only 12.5 miles away, while the far west of the sub-region can take as long as 1.5 hours, beyond most workers' desire to commute. The key corridors for east-west journeys are the A259 and the A27 while the A23, recently improved north of Bolney, shows access to Brighton and Hove from the southern edge of Crawley, within 30 minutes.

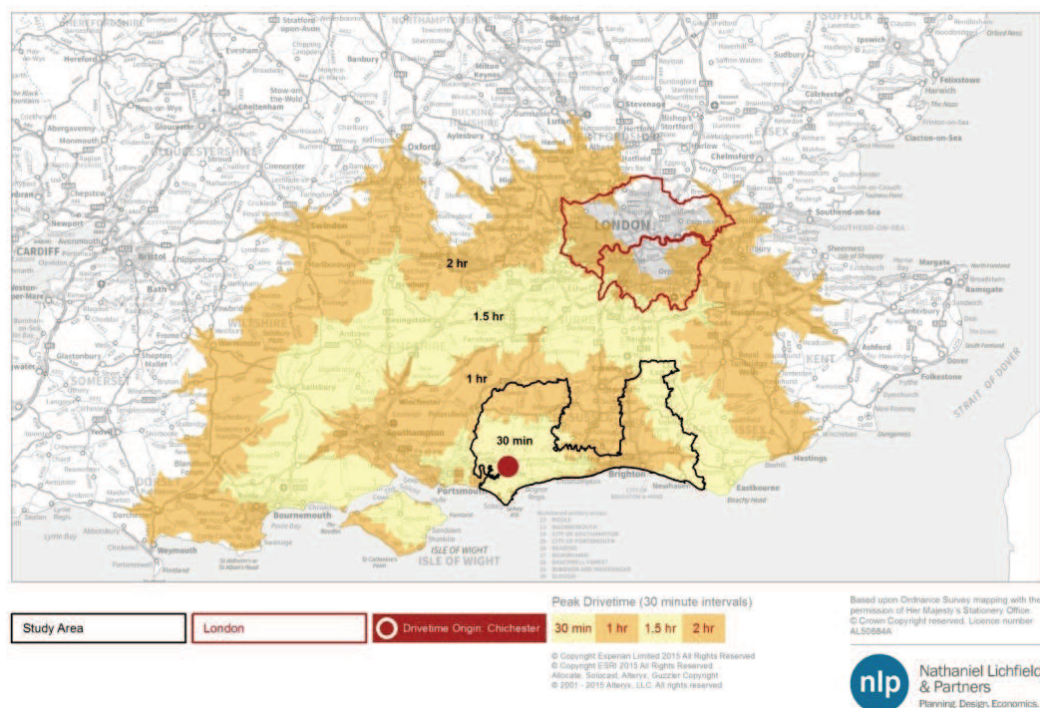
Figure 3.3 Brighton Peak Drivetime Distance



Source: ITA analysis

3.8 The isochrones map for peak travel originating in Chichester city shows high levels of 30 minute drivetime accessibility across the CWS region but notably hits the one hour boundary at Worthing. Greater Brighton is at the outer reaches of that hour band making accessing the employment centre of Greater Brighton from the far west of Coastal West Sussex much more difficult.

Figure 3.4 Chichester Peak Drivetime Distance



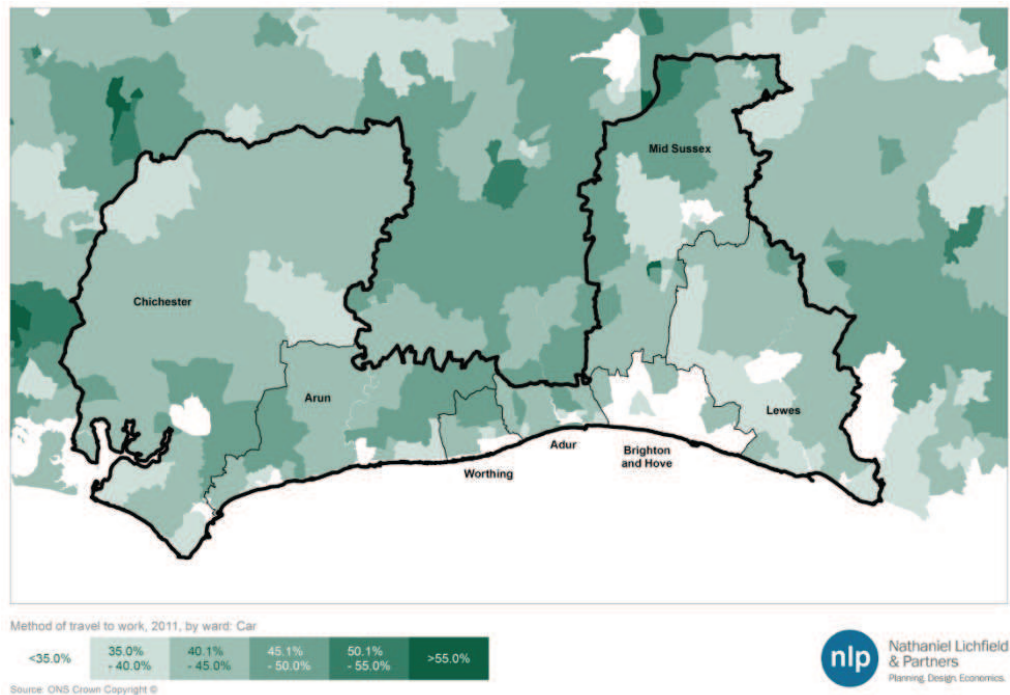
Source: ITA analysis

Public Transport and Access to Jobs

3.9

The role of public transport, especially rail, in extending labour market catchment is also important to sustainable growth objectives. Many, especially younger, workers don't have access to a car and parking is a more expensive and scarce resource in Brighton & Hove and, to an extent, Chichester, than it is in the rest of the study area. However as Figure 3.5 overleaf shows, it is apparent that the reliance on car in wider CWS is much greater than that of Greater Brighton and Chichester reflecting supply of alternative modes and the very different urban/rural splits.

Figure 3.5 Car journeys to work 2011

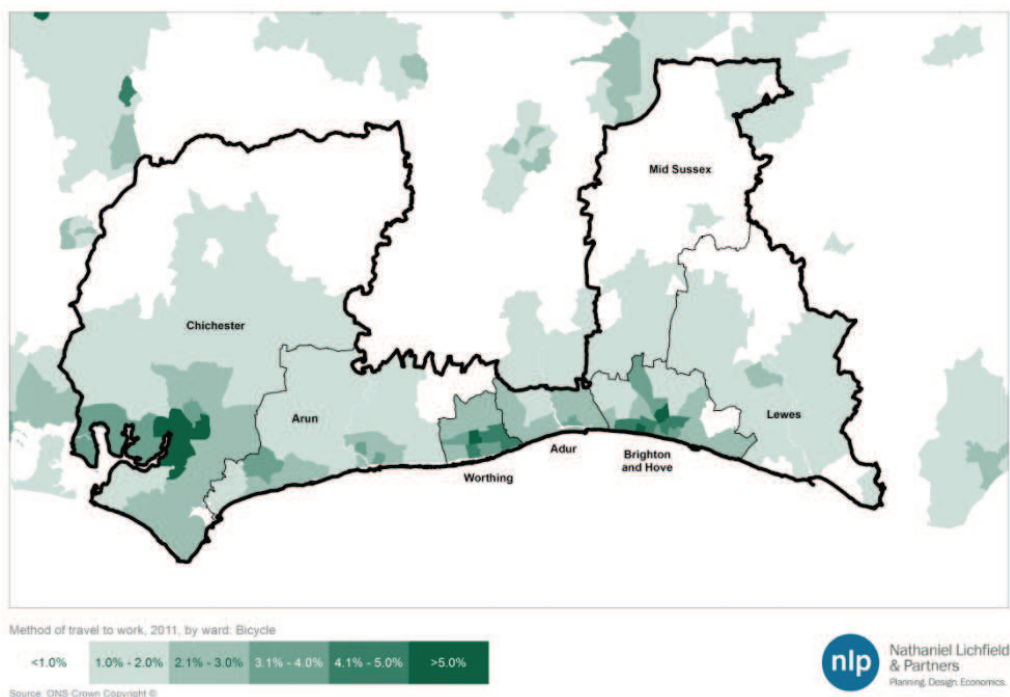


Source: 2011 Census / ITA analysis

3.10

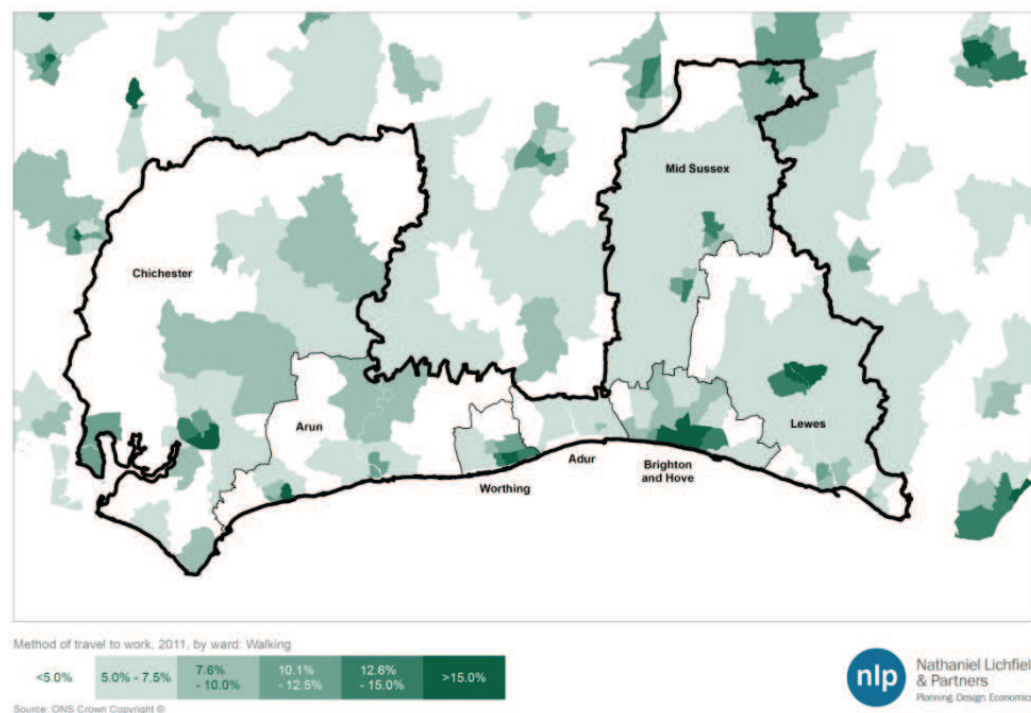
The sharp contrast in non-car mode journeys in Figure 3.6 below. Mapping these journeys shows the importance of alternative modes in the urban areas with Brighton, Worthing and Chichester showing much higher cycling and walking modal share and Brighton in particular having very high bus utilisation.

Figure 3.6 Bicycle journeys to work 2011



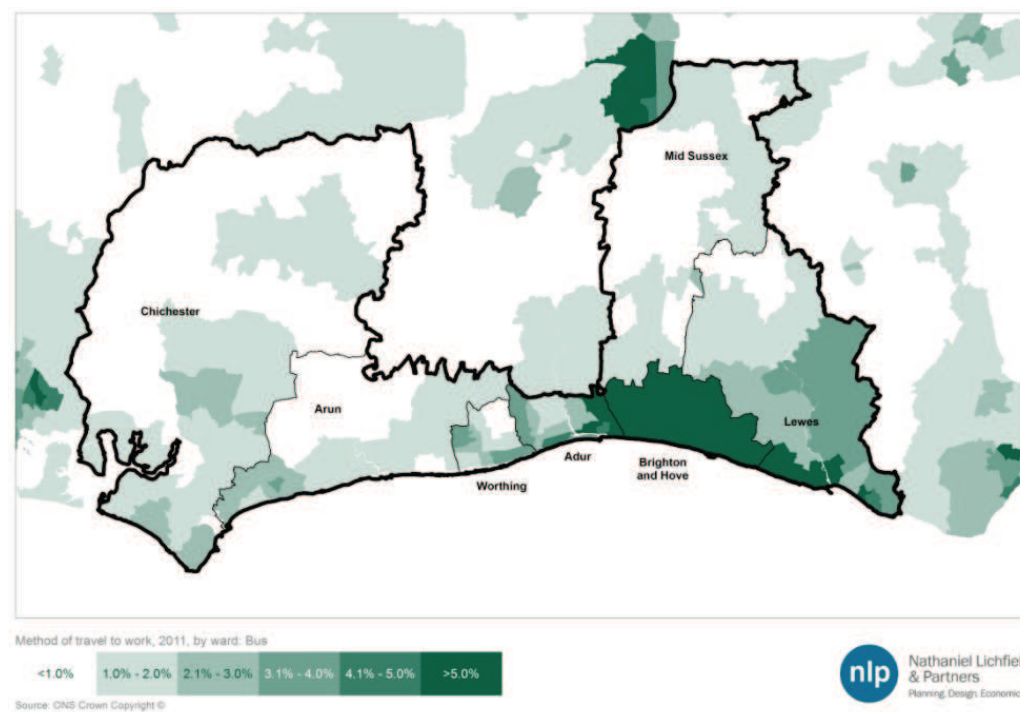
Source: 2011 Census / ITA analysis

Figure 3.7 Walking journeys to work 2011



Source: 2011 Census / ITA analysis

Figure 3.8 Bus journeys to work 2011



Source: 2011 Census / ITA analysis

3.11

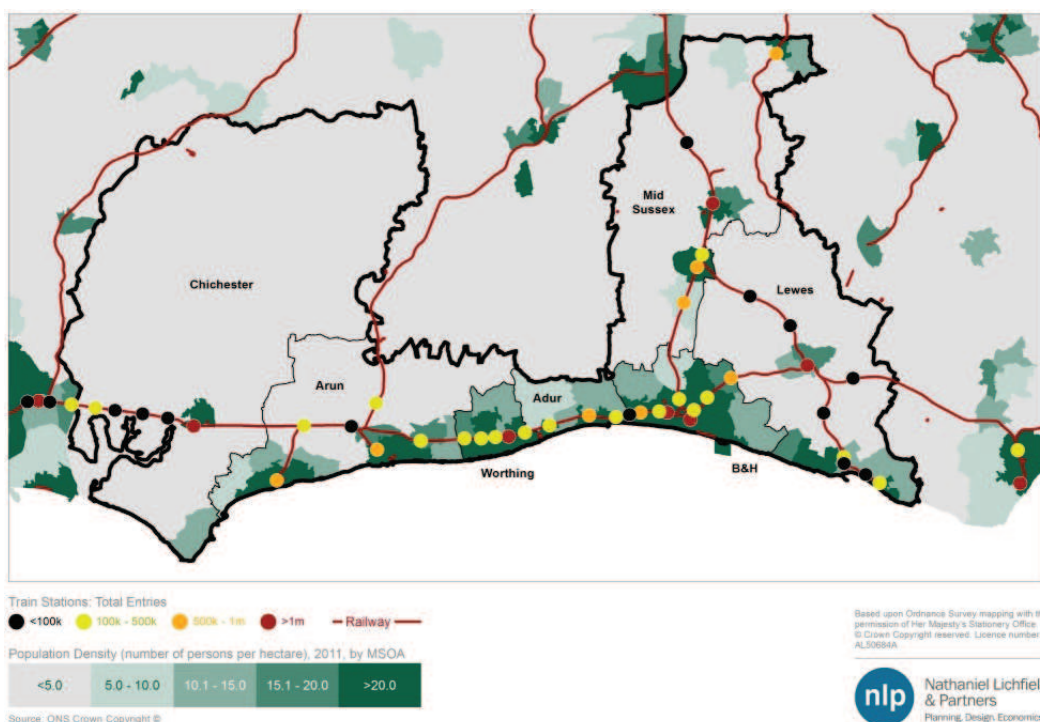
Figure 3.9 demonstrates the current significance of north-south rail links by showing station usage across the region. The map also illustrates the positive

correlation between station usage and population density. Key stations are unsurprisingly in more densely populated areas although the influence of the West Coastway further west, towards Portsmouth, is less strong, reflecting the slow journey times between economic centres in the west of the study area. With the need to increase the access to labour, it is likely that both north-south and east-west rail corridors will need capacity enhancement.

3.12

Journey times between Brighton and Chichester are unattractive for work journeys especially when considering the whole journey (e.g. access and egress time, waiting time and the rail journey itself). The paucity of express services as well as the east-west connectivity across Brighton which requires a change of train can act as a significant barrier for those considering work further afield. Journey times from Chichester to Lewes are up to 90 minutes and access to Newhaven circuitous.

Figure 3.9 Station usage and population density 2011



Source: 2011 Census / ITA analysis

Barriers to Travel-to-Work

3.13

As well as journey time, there are other barriers for travel-to-work purposes. Among the key factors are:

- 1 Reliability of network – the A27 and its feeder roads are prone to congestion and poor network resilience with resulting impacts on the economy as well as quality of life.⁶ Bus networks can also be prone to

⁶ "The analysis of available reliability and delay data indicates problems along the route that impact on the efficient and safe movement of people and goods and have consequential effects on the environment and local communities.", A27 Corridor Feasibility Study Summary, Department for Transport March 2015

unreliability from congestion, in urban areas, although much as been done to promote bus priorities, particularly in Brighton & Hove. Most recent data on 'Right Time' performance indicates that Southern Trains delivered just 50.4% of train journeys on time across the last year, compared with 65% nationally.⁷ Lack of confidence about journey times acts as a constraint to job seekers from looking further afield. Better confidence in commuting journey times could improve flexibility in both the housing and labour markets.

- 2 Cost – the overall cost of a journey is often a barrier to travel and for those seeking work, the cost of either parking at your destination or individual journeys on public transport can be particularly significant. Drawing on research around the country, it is evident that in particular lower paid workers find stored value or season tickets unattractive due to up-front cost and therefore are penalised with higher fares.⁸ This can require policy intervention to enable access to jobs across the economic spectrum.
- 3 Last mile impacts – the drivetime isochrones as well as the feedback from workshops demonstrates the significant barrier that the final mile connection has on peak-time accessibility. A relatively straightforward journey for 10 miles can be stifled in the last mile with congestion in employment centres deterring those who might otherwise be attracted to city centre employment. In Brighton & Hove, between Jul 2007 and Dec 2014, average AM peak road speeds on locally managed A roads declined from 17.7mph to 16.2mph which equates to an 8.5% increase in congestion.⁹ The equivalent figures for West Sussex were 31.3mph to 30.1mph (4% increase in congestion) and East Sussex 29.6mph to 28.8mph (3% increase in congestion) with the mix of urban/rural roads across the counties underplaying changes in average speeds in urban areas.

Summary

- 3.14 The level of employment growth expected in the Greater Brighton and CWS areas is expected to be around 57,000 by 2031. The existing local labour markets cannot fulfil all requirements and as such both Greater Brighton and Coastal West Sussex will need to create an environment where transport constraints are minimised as a determining factor in labour market choices.
- 3.15 This will require region-wide considerations of the barriers outlined above and development of solutions which will increase connectivity for all. Examples of this will include considering the trade-offs between better express rail services and the current "metro" style service provision, particularly on West Coastway and for the Brighton Mainline. Improvements to the A27, particularly in CWS

⁷ <http://www.networkrail.co.uk/about/performance/>

⁸ "Ticket To Thrive" PTEG February 2015 and "Understanding the DLR Market" The Railway Consultancy/Interfleet Transport Advisory, July 2013

⁹ HMSO/DfT data underpinning congestion incentive element of Integrated Transport Block Grant allocation

and around the Brighton & Hove bypass, have a major role to play in reducing journey times and their variability and enhancing access to more jobs.

4.0

Access to Markets and Services

Other UK regions, particularly those mixed rural and urban economies, have carried out research to establish the importance of connectivity within a region.¹⁰ In most cases, policy statements focus on the importance of improving intra-regional metropolitan connections as well as improving core urban travel in order to spread economic activity and housing pressures.

- 4.1 The previous section focused on access to jobs and the challenges that the region faces in terms of widening labour markets, this chapter focuses on other trips and the competing demands for travel. This includes business and work trips, off-peak service related trips and particularly visitor/amenity related trips. Constraining these trips can negatively impact the regional economy
- 4.2 There is evidence that the economic cohesion of the Greater Brighton and Coastal West Sussex area is limited by poor connectivity. Travel opportunities are constrained by a number of transport service and infrastructure supply issues. These constrain economic activity through limiting access to customers/markets across the region. The lack of regional connectivity also affects the visitor market which may be constrained through perceptions of lack of access (including the intra-regional leisure market).
- 4.3 With continuing population and economic growth planned across Coastal West Sussex and Greater Brighton, the opportunity exists for local businesses to serve this bigger market more effectively. Specific opportunities are set out below.

Improving Journey Times

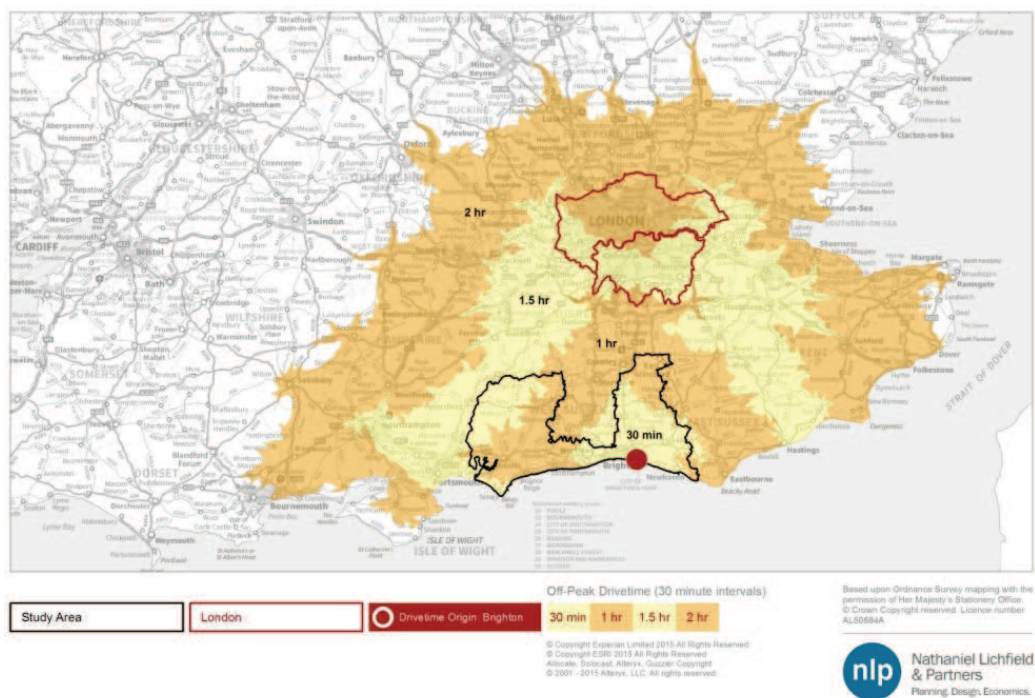
- 4.4 Improving journey times in both peak and off-peak will bring markets closer together allowing local business to access customers previously considered beyond their reach. This might apply to B2B service companies, for example, or to retail investments needing a wider hinterland catchment. It will also benefit businesses needing to expand by extending opportunities to access affordable commercial space: a key issue identified by stakeholders. For example, start-ups which are culturally aligned to Brighton & Hove may currently consider leaving the sub-region to expand. Better connectivity can play a part in allowing local expansion, aligned with medium-size, affordable workspace and access to skilled labour. Bringing key strategic sites (e.g. Enterprise Bognor, Newhaven etc) closer from an accessibility perspective could encourage otherwise footloose business to remain in the area.

¹⁰ See for example "The Importance of Transport Connectivity in Support of Regional Economic Development" Association for European Transport and Contributors, 2009. "A Metro for Wales' Capital City Region" Cardiff Business Partnership and Institute of Welsh Affairs, 2011. It should be noted that the creation of the Great Western Cities Region in 2015 linking Bristol, Cardiff and Newport increases the emphasis on regional connectivity as a means to increase economic activity.

Improving Access for Off Peak Journeys

- 4.5 The West Sussex Local Transport Plan specifically highlights the traffic-related problems at Arundel during weekends and holidays. This is reiterated in the 2013 Arundel Neighbourhood Plan which has the aspiration to improve the historic town centre's attractiveness to both residents and visitors through the mitigation of traffic congestion.¹¹
- 4.6 Analysis of off-peak driving times shown in Figures 4.1-4.3 below shows that as expected, the catchment for off-peak movements is wider than at peak times but the spread from Brighton & Hove is still constrained to the west, beyond Worthing. The 30 minute, off-peak drivetime catchment for Worthing encompasses Brighton & Hove but is further constrained to the east with Lewes and Burgess Hill being at the very edge of the boundary. Being able to move the 30 minute band further to the east and west would demonstrate an increase in market size and encompass significant non business related journeys such as access to coastal towns and the South Downs National Park.

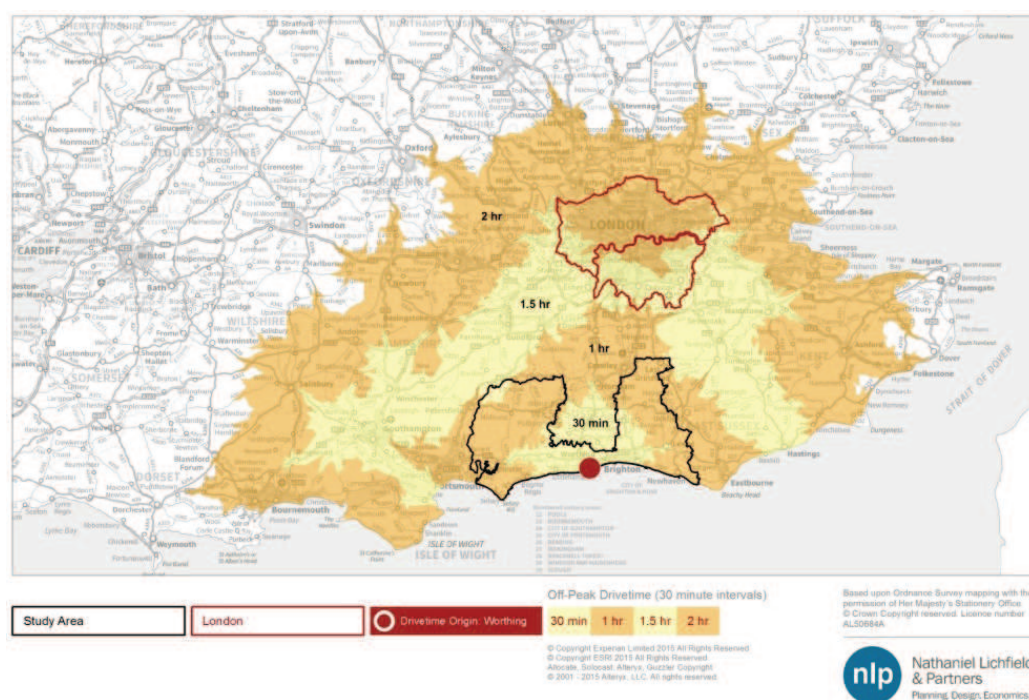
Figure 4.1 Brighton & Hove off-peak drivetimes



Source: ITA analysis

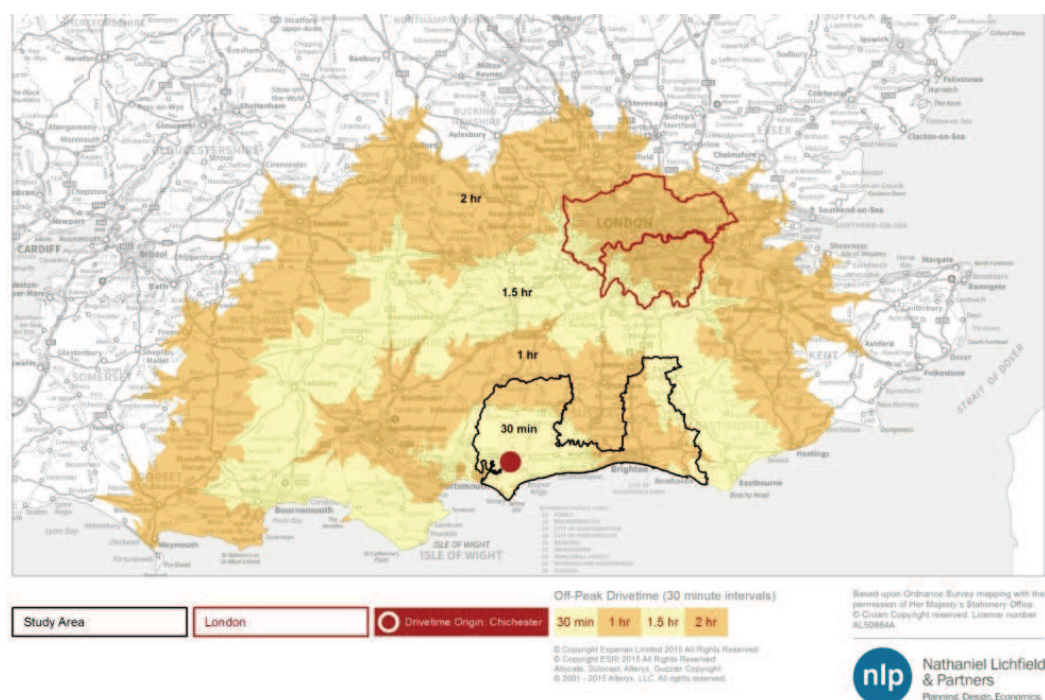
¹¹ Arundel Neighbourhood Plan 2014 – 2029, Arundel Town Council November 2013

Figure 4.2 Worthing off-peak drivetimes



Source: ITA analysis

Figure 4.3 Chichester off-peak drivetimes



Source: ITA analysis

Improving Movement of Through Traffic from Ports

- 4.7 Allowing through traffic (e.g. port-related) to move more quickly and efficiently through the area would reduce environmental impacts and improve connectivity for the port hinterland. This in turn could encourage increased volumes through ports and, in turn, may generate expanded employment and goods supply opportunities.
- 4.8 With Shoreham aspiring to grow its portfolio of construction and project-related traffic, solutions are being sought to address its access constraints. Newhaven is also implementing an investment plan which will facilitate the creation of port employment sites, the construction of the Newhaven Port Access Road and enable more diversified traffic to pass through the port (an improved ferry service is being introduced for the summer and there are plans for a deep water berth).
- 4.9 Enabling port gateways through additional hinterland investment reduces the negative impacts of port activities in urban areas while maximising economic opportunities. These economic opportunities can also facilitate the investment in transport services required to ensure connectivity with the economic hub of Brighton & Hove and increase potential for agglomeration.

Encouraging Sustainable Visitor Trips

- 4.10 Research indicates that leisure travellers are more averse to changing trains¹² and therefore more direct (off-peak) rail access to parts of the South Downs National Park (SDNP) could facilitate more integrated, sustainable visitor trips. For example, a direct service between Brighton & Hove and Horsham, via the Arun Valley, would encourage visits to the SDNP and to seaside destinations.

Summary

- 4.11 This section has identified the current constraints of the GBCWS area in providing area wide connectivity and in particular the limitations of car and rail modes in accessing markets and services beyond the near hinterland. This supports the conclusions made earlier which identified barriers to labour markets across GBCWS.
- 4.12 To match the forecast economic and housing growth will be the need to increase the range and depth of services and amenities available to residents and businesses. Transport intervention opportunities will include integrated packages of transport measures including highway improvement schemes, consideration given to the enhancement of public transport and the development of walking and cycling networks that support economic growth and improve strategic access for all.

¹² The Passenger Demand Forecasting Handbook 5.1 refers to the barriers to travel which leisure users may perceive from having to change trains when making occasional trips (familiarity reduces this significantly). This perception also increases with age which may fit with the day-tripper demographic of the SDNP.

5.0

Increasing Capacity through Sustainable Transport

The significant progress made by Brighton & Hove in encouraging non-car journeys to work goes hand in hand with the economic growth being experienced within the City. Jobs grew by nearly 27% between 1997 and 2014 and GVA per capita is 47% above the study region average at £43,900. Increasing sustainable transport choices will create greater capacity within the transport network across Greater Brighton and Coastal West Sussex to accommodate planned growth.

- 5.1 In addition to creating capacity in “overheated” urban economies, increasing non-car based modal share may also help smaller town centres. Research has identified that high street turnover increases by between 5% and 15% following investment in schemes to improve the public realm (London Development Agency, 2010) and that people who travel to the shops on foot, by cycle or by public transport spend as much, if not more than those who travel by car.¹³
- 5.2 In addition to facilitating inter-urban journeys, Greater Brighton has a dense rail network that plays an urban “metro” role between Lewes and Worthing and as far north as Haywards Heath and enables local economic activity.¹⁴ The rail network’s potential role in facilitating longer intra-regional journeys needs examination. This includes consideration of the wider impact of reinstating the Lewes-Uckfield line which has the potential to increase local connectivity as well as provide additional route capacity and resilience for the north-south corridor.¹⁵ The 2009 examination of the business case for this route showed poor value for money (BCR <1) but the Government has recently announced further funds to develop this as an option. Brighton & Hove has a dense, high quality and successful bus network that provides at least a 10 minute daytime frequency for 85% of passengers.¹⁶
- 5.3 Outside of Brighton & Hove the bus plays an important social and economic role, although services are obviously much less frequent in rural areas. Supported network budgets have come under pressure in the current financial climate. For example, significant cuts in services and a fare increase of up to 30% are due to be implemented in Lewes District in April 2015. Funding constraints might make more critical opportunities for local authorities to engage with developers to “pump prime” bus services to new developments in order to encourage early adoption of mode shift rather than waiting for critical mass to make services viable. This is particularly the case for areas such as Toads Hole Valley where housing development is planned remote from existing services (and it is recognised that bus improvements are planned).

¹³ Creating Growth: Cutting Carbon, 2011, Department for Transport

¹⁴ “Metro” rail services are characterised as frequent services focused on serving an urban area and its suburban limits

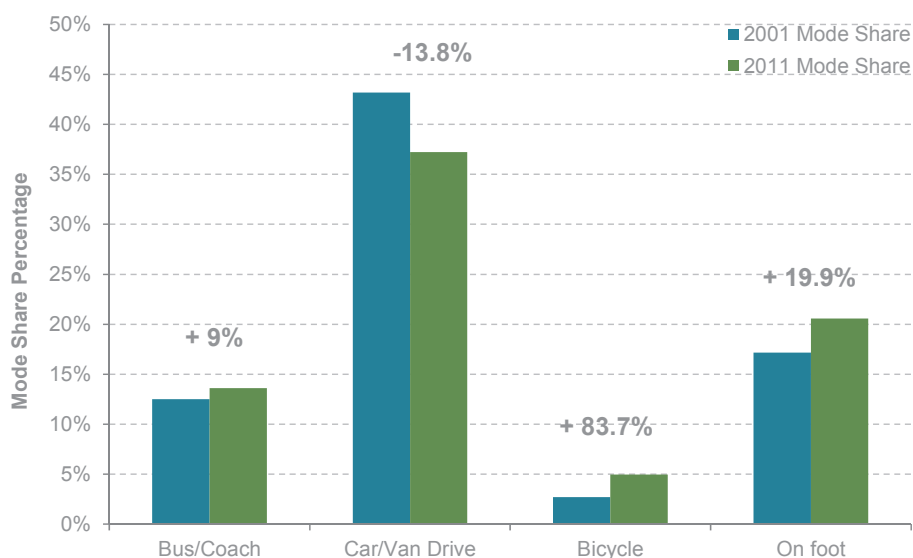
¹⁵ Although the latter will also rely on capacity solutions at East Croydon and infill electrification north of Uckfield

¹⁶ Source: Brighton & Hove Bus Company

5.4

Brighton & Hove has seen significant increases in non-car mode use with a doubling of cycle mode share for journeys to work between 2001 and 2011 (from 2.7%) of all journeys to 4.9%.¹⁷ Both walking and bus commuter trips have increased over the decade while car use has declined by 14% from 43% of modal share to 37%). Bus usage in Brighton & Hove is among the highest in the UK outside of London with 167 journeys per head of population.¹⁸

Figure 5.1 Brighton & Hove Journey to work mode share 2001-2011

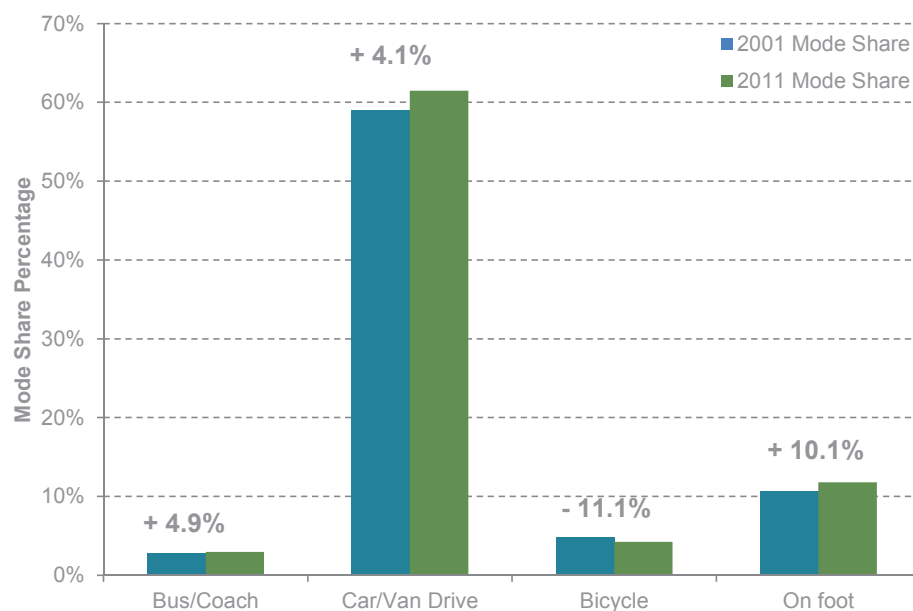


Source: 2001 and 2011 Census / ITA analysis

5.5

By comparison, the CWS area has seen modest changes in mode share.

Figure 5.2 Coastal West Sussex Journey to work mode share 2001-2011



Source: 2001 and 2011 Census / ITA analysis

¹⁷ 2001 & 2011 NOMIS Census Data

¹⁸ National Bus Statistics 2013/14, Department for Transport

- 5.6 In addition to being a focus of economic activity, Brighton & Hove is also a significant attractor for young people for both employment and education. This supports the trend towards non-car based modal choice as car ownership continues to drop among young people. National Travel Survey statistics between 2000 and 2013 show a decline of 25% in full driving licence holders aged between 17-20 and 12% for 21-29 year olds.¹⁹ Reasons given for this decline are usually based on cost and as such non-car modes will be more important. This in turn gives rise to a requirement to cater for non-car modes in terms of both traffic engineering and other infrastructure such as storage, secure parking etc. The Brighton & Hove LTP3 highlights the importance of cycling in particular and the designation of Cycling Town which brought funding for cycling infrastructure and resulted in a 27% increase in cycling between 2006 -2009. The new draft LTP demonstrates an ongoing commitment to sustainable and non-car modes and the City has secured funding for improving the cycle network on east-west routes and for a bike share scheme²⁰.
- 5.7 If growing businesses look to relocate some or all of their functions to other locations within the study region, increasing travel mode choice will also support growth. With cycle to work journeys being attractive up to a range of 5 miles²¹ and an average national commute of 9 miles²² there remains scope to increase numbers choosing to cycle to work.
- 5.8 Research into barriers to increasing cycling reveals that there a number of key issues some of which can be addressed either through policy or investment:
- Concerns about the physical environment, particularly the perceptions of safety: nearly all surveys refer to respondents who perceive that roads are dangerous with not enough speed restrictions or dedicated, segregated cycle lanes.²³
 - Security: in urban areas in particular, a lack of secure cycle storage both at home or at work is a deterrent.²⁴
 - Workplace facilities: provision of shower and changing facilities by employers.
- 5.9 Further work with both strategic site developers for both housing and commercial development and businesses to address issues of bike storage, changing facilities, safe routes, avoiding busy main roads will remain important to enable more people to choose cycling for everyday journeys.
- 5.10 It is noteworthy that East Sussex County Council has been successful in establishing 'East Sussex 'Wheels2Work' through the procurement of a provider to establish a social enterprise to operate the scheme, to ensure the long-term sustainability of the project. This has initially been funded by the

¹⁹ National Travel Survey 2013, Department for Transport

²⁰ Draft Local Transport Plan 2015, Brighton & Hove City Council

²¹ Brighton & Hove Local Transport Plan 3, 2011, Brighton & Hove City Council

²² National Travel Survey 2013, Department for Transport

²³ Climate Change and Transport Choices, 2011, Department for Transport & Barriers to Cycling, CTC, C-PAG and Southampton City Council, 1997

²⁴ Online survey for Transport for Greater Manchester, 2011

Local Sustainable Transport Fund (LSTF) secured by the County Council, and further expansion of the scheme will be undertaken which provides a means of increasing mobility through a moped, motorcycle and electric cycle hire service. Schemes such as these enable non-car owners to access employment further afield. This could also apply to those strategic sites which are not well served by public transport. WSCC, B&H and the SDNP have also benefited from the LSTF.

- 5.11 Drawing on experience in peer group cities such as Norwich, Bristol, Cambridge and Bath, there are opportunities that work well elsewhere in encouraging non-car mode usage. Park and Ride is one such popular policy: for example more than 1.6m trips annually are made by park and ride bus to Cambridge. Finding suitable sites has been an historic constraint in Brighton & Hove. Nevertheless, the more comprehensive bus priority network now in place in the City would make the commercial operation of park and ride more viable than in the past. Intercepting inter-urban traffic to use park and ride potentially takes pressure off parking and highway capacity as well as rail services.

Summary

- 5.12 There has been significant progress in enabling people to access more sustainable transport modes in Brighton & Hove. Key questions moving forward are: how far can this be extended in the City? How much progress can be made in this regard in the suburban and rural parts of the study area? The evidence suggests that this is critical in breaking the link between economic and traffic growth and therefore promoting sustainable economic growth.

6.0

Future Opportunities and Actions

This section draws together the implications from the preceding analysis to identify future opportunities and actions in support of promoting long-term sustainable growth across Greater Brighton and Coastal West Sussex with particular reference to the transport system.

- 6.1 All three papers reflect the diversity of the Greater Brighton and Coastal West Sussex region. In transport terms this is demonstrated by high levels of short and medium length trips being made by car (particularly along the A27) together with significant levels of non-car travel in urban centres such as Chichester and Brighton & Hove. With economic growth largely focused in the East and West of the region, and a third of all jobs focused on 5% of the land area it is unsurprising that there are high levels of localised congestion which in turn constrains economic growth, access to employment and quality of life.
- 6.2 The region is both enhanced and constrained by the proximity of National Park and sea which, as the economy grows, forces planners to consider difficult choices because of the high quality landscape and townscape environments across the area.
- 6.3 The transport needs of the Greater Brighton and Coastal West Sussex Region have been broadly assessed from the perspective of future economic and housing growth. In order to support jobs and match housing forecasts, three particular areas where transport has a role to play have been identified:
- 1 Improvements to the A27: evidence suggests that this represents a significant constraint on east-west travel for business and commuting travel. Moving forward across the study area, housing and strategic site location will increase traffic on key strategic routes and the A27 (as well as the A259 and connecting roads), will be a focus for growth.
 - 2 Rail and bus provision: both north-south and east-west rail provision can help support growth and increase the in-scope geography for those seeking work or new business locations. The role of bus in improving connectivity for Adur, Worthing, Brighton & Hove and Newhaven can also support the development of housing and employment.
 - 3 Mode shift: Brighton & Hove has seen high levels of economic growth as well as shifts to non-car based modes. Enabling more mode shift across GBCWS, particularly in other urban areas may also support sustainable growth by creating headroom in the relationship between economic and traffic growth.
- 6.4 These three broad areas of interest also highlight the challenge that GBCWS faces with respect to the trade-offs required. These choices will require further appraisal. For example, creating a more attractive rail service across the area with express services may compromise the “metro” nature of existing Greater Brighton rail services or require significant investment in order to create an enhanced service which meets both local and longer distance needs.

- 6.5 These choices will need to give due weight to national policy: for example, DEFRA's guidance on road building through National Parks states:
- "there is a strong presumption against any significant road widening or the building of new roads through a (National) Park unless it can be shown there are compelling reasons for the new or enhanced capacity and with any benefits outweighing the costs significantly"*²⁵
- 6.6 The SDNPA has a position statement on the A27, which recognises that:
- "...a balance needs to be struck - nationally - between the need for accessibility and mobility and the need to safeguard the National Park landscapes and communities."*²⁶
- 6.7 Understanding the role of transport in linking strategic sites and housing to opportunities also requires the ability to blend transport policy (fares management, integrated ticketing, parking) with investment (removal of pinchpoints, creation of rail capacity and increased bus service provision). The area is already seeing opportunities for increasing integration and supporting economic growth with blended investment. For example, the flood defence funding for Newhaven unlocks brown field development sites and will potentially increase demand for transport services between Brighton & Hove and Newhaven.
- 6.8 Based on a high level view of job growth and planned housing and applying an assumption of 1.2 jobs per household it is anticipated that the smaller authorities of Lewes and Adur will be increased net exporters of workers by 2031 as housing growth is planned to outstrip internal job growth. Brighton & Hove, Chichester, Worthing and Mid-Sussex are unlikely to be able to supply enough labour for planned growth within their own areas with Brighton & Hove falling short of internal incremental supply by up to 4,000 jobs.
- 6.9 Thus it is the neighbouring authorities that will need to supply labour to those employment centres. For example, based on planned housing growth, Arun may address Chichester and Worthing's labour supply deficits while Lewes and Adur could meet approximately half of the core City's labour supply requirement. However, this also makes no assumptions about jobs being taken up by workers from outside the region.
- 6.10 In order to understand the transport impact of planned growth and housing, the current journey to work mode shares for those districts which would supply labour have been mapped. This demonstrates where, in each mode, pinchpoints are likely to occur. For example, both Adur and Lewes are expected to provide an additional 1000 workers into Brighton & Hove by 2031. Arun is expected to provide 3-4,000 workers to Chichester and Worthing. The current journey to work modal shares are shown in Table 6.1.

²⁵ English National Parks and the Broads - UK Government Vision and Circular, 2010

²⁶ Position Statement on A27 route corridor, South Downs National Park Authority
<http://southdowns.gov.uk/wp-content/uploads/2015/03/A27-Position-Statement-following-28-October-NPA-meeting.pdf>

Table 6.1 Modal Shares for Travel to Work Journeys, 2011

	Rail	Bus	Road
Adur – Brighton & Hove	11%	12%	67%
Lewes – Brighton & Hove	7%	25%	63%
Arun - Chichester	5%	5%	86%
Arun - Worthing	5%	3%	86%

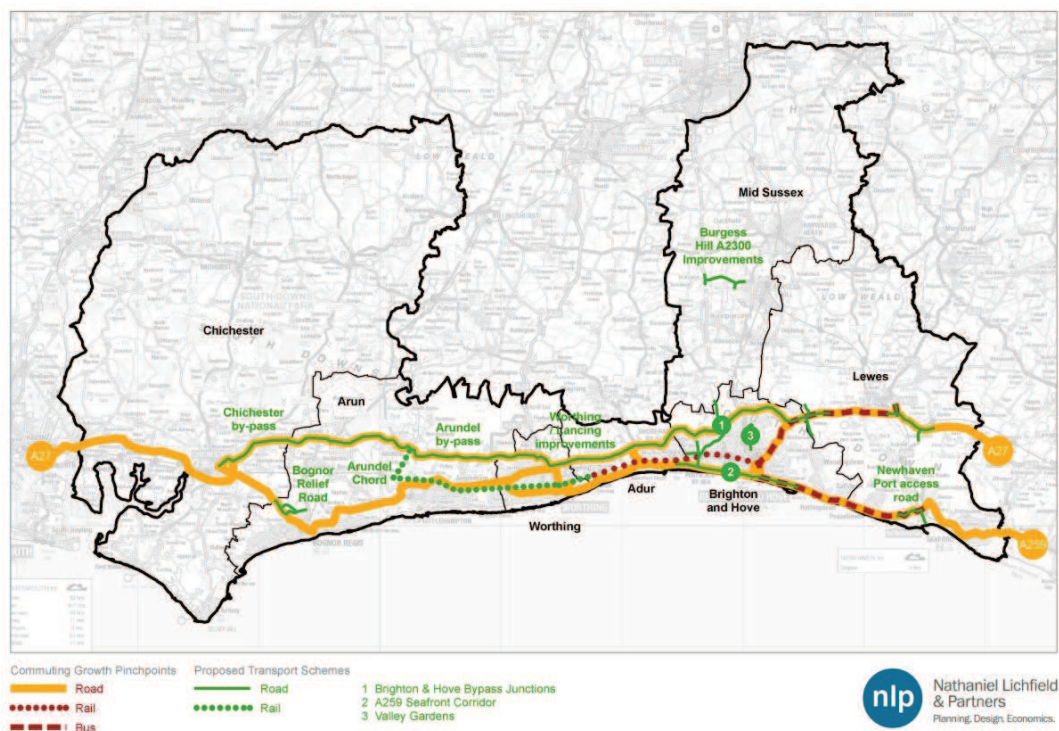
Source: 2011 Census / ITA analysis

6.11 Taking into account that car travel may become relatively less attractive as parking provision is unlikely to increase proportionately to job growth in urban areas, it is expected that the following transport links will become pinchpoints:

- a local (stopping) rail services between Worthing and Brighton & Hove
- b bus capacity on A259 Newhaven-Brighton & Hove
- c bus capacity on A27/A270 Lewes-Brighton & Hove
- d A27 and A259 road capacity Shoreham-Brighton & Hove
- e road capacity on A259 from Newhaven to Brighton & Hove
- f A27/A270 road capacity from Lewes to Brighton & Hove
- g A259 road capacity Bognor-Chichester
- h A259 road capacity Bognor-Worthing
- i A27 road capacity Arundel-Chichester
- j A27 road capacity Arundel-Worthing

6.12 With knowledge of proposed transport schemes, understanding of where growth will occur and the transport network, it is possible to map schemes to capacity. The figure below shows commuting growth pinch points for road, rail and bus as well as proposed schemes. This map demonstrates very clearly the need for a co-operative approach to transport planning across the three statutory authorities as the current schemes cannot release enough capacity into the network to encompass all the planned growth. The proposed schemes will relieve particular, known pinch points but a more integrated and multimodal approach will be required.

Figure 6.1 Commuting pinchpoints and proposed transport investment



Source: ITA analysis

Opportunities and Actions

- 6.13 Based on forecasts of growth and the aspirations to maximise opportunities across the region, three key themes have been identified which have been outlined in the earlier sections of this paper. While it is not within scope to appraise individual transport schemes and each proposed scheme will be required to go through the usual evaluation process, opportunities for transport improvements have been considered against these themes. Table 6.2 below shows an assessment of the opportunities identified through workshops and the evidence base against the themes.
- 6.14 It is recognised that not all these opportunities will prove to be feasible or value for money. They nevertheless represent an important output from this background paper and can help guide any consideration of transport strategy across the Greater Brighton and Coastal West Sussex areas. Core opportunities are denoted by '✓✓' whereas an opportunity which is a contributing factor is denoted by '✓'.

Table 6.2 Potential Opportunities to Support Transport Strategy Implementation

Strategy element	Theme 1: access to labour	Theme 2: improving area-wide connectivity	Theme 3: improving non-car mode choice	Delivery Stakeholders
A27 pinch point relief: E-W/Brighton incl Brighton bypass junctions	✓✓	✓✓		Highways Agency, DfT, Local Authorities,
Removing bottlenecks around ports		✓✓		Local Authorities, Port Authorities, Port owners (if not owner)
West Coastway -Brighton rail capacity	✓✓	✓✓	✓✓	Network Rail, DfT, TOC, Local Authorities
Brighton Mainline capacity	✓✓	✓✓	✓✓	Network Rail, DfT, TOCs, Local Authorities
Service pattern improvements: B&H, mid-Sussex and Crawley/Gatwick	✓✓	✓✓	✓✓	Network Rail, DfT, TOCs, Local Authorities
East of Brighton rail service improvements	✓✓	✓✓	✓✓	Network Rail, DfT, TOCs, Local Authorities
Rail journey time improvements	✓✓	✓✓	✓✓	Network Rail, TOCs, DfT, Local Authorities
New direct route services via schemes such as Arundel Chord	✓✓	✓✓	✓✓	Network Rail, DfT, TOCs, Local Authorities
Last mile peak-time access to larger urban areas:				Highways Agency, Local Authorities, bus operators, developers
- Traffic flow management through ITS and transport choice	✓	✓✓		
- Park & Ride options	✓	✓✓	✓✓	
Non-car mode choice:				Local authorities, developers, local business,
- Improvements to way finding, pedestrian			✓	

Strategy element	Theme 1: access to labour	Theme 2: improving area-wide connectivity	Theme 3: improving non-car mode choice	Delivery Stakeholders
prioritisation, safe havens				(e.g. new tenants on strategic sites), potential sponsors
- Bicycle friendly traffic engineering	✓	✓	✓	
- Quiet/safe route creation	✓	✓	✓	
- Residential and workplace secure storage				
- City bike schemes for business travel	✓✓	✓	✓✓	
- Wheels2Work expansion				
Integrated ticketing	✓	✓✓	✓✓	Local Authorities, bus operators, TOCs,
A review of bus fares and affordability	✓✓	✓	✓	Local authorities, operators
Mixed mode choice for port access (remove pedestrian/commercial vehicle conflict)			✓✓	Local Authority, Port Authorities, Port operators
Improvement in freight route management		✓✓		Highways Agency, local authorities, Port Authorities, Port operators

Source: ITA analysis

Monitoring Outcomes

6.15

Key to understanding the success of any strategy is clearly stating desired outcomes and identifying the right metric against which success can be judged. As identified earlier in the paper, that there is a gap in the overall literature which sets out a clear strategy for transport in the Greater Brighton and Coastal West Sussex area. This also means that metrics are not gathered at this area level but either at the sub-region (e.g. the Coast to Capital LEP or County Council) or local level (e.g. individual local authorities). As part of an overall need for greater coherence between the local partnerships, agreement on which metrics to be collected will be needed. Table 6.3 overleaf highlights some metrics that could be collected in order to measure progress against objectives.

Table 6.3 Potential Monitoring Indicators

	Theme 1: access to labour	Theme 2: improving area-wide connectivity	Theme 3: improving non- car mode choice
Isochrones: peak driving times to/from employment centres	✓		
Isochrones: off-peak driving times across the region		✓	
Average journey to work distance	✓		
Average journey to work time	✓		
Non-car use in journey to work across the region		✓	✓
Non-car, travel to work at key strategic sites	✓		✓
Road capacity measurements peak/off peak	✓	✓	
Passenger numbers on peak rail services	✓		✓
Passenger numbers on off-peak rail services		✓	✓
Average length of rail journey (E-W)	✓	✓	
Right time rail performance		✓✓	✓

Source: ITA analysis



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