

Greater Brighton Business Survey

Stage One Report – Draft

Matthew Williams, Tony Wilson, Clare Huxley, James Cockett



Institute for Employment Studies

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Institute for Employment Studies
City Gate
185 Dyke Road
Brighton BN3 1TL
UK

Telephone: +44 (0)1273 763400
Email: askIES@employment-studies.co.uk
Website: www.employment-studies.co.uk

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Executive summary

This report presents the findings from Stage One of the Greater Brighton Business Survey, which gathered information from existing reports, local stakeholders, and national business and employment data sources to provide a baseline of information prior to the survey, and views on questions and topic areas that could usefully be covered in the survey to fill gaps in knowledge and understanding.

The key findings are presented here under the five key themes in the Greater Brighton Economic Board strategy.

Summary of key opportunities and challenges for Greater Brighton businesses, and question ideas for the business survey

Themes	International	Creative	Connected	Talented	Resilient
Opportunities 	Home to international businesses/exporters in: - Life sciences - Advanced manufacturing - Financial services	Creative sectors over-represented, particularly in B&H Businesses are innovative (survey data and exemplars eg B&W Speakers)	International airport and ports Digital connectivity via superfast broadband in most of area – plans to upgrade on coast/B. Hill	Two universities Colleges and specialist trainers Well-educated workforce	Strong business survival rates Key sectors have out-performed national growth rates
Challenges 	Lack of understanding of exporting businesses, particularly service businesses Leadership/ management skills barrier to exporting	Supporting creative or innovative business as they seek to grow – business support and lack of commercial space	Poor E-W road links in Adur/Worthing N-S rail has reliability issues Transport improvements vs environment	Staff shortages in Crawley Transport difficulties hinder movement of labour Businesses’ engagement with Apprenticeships, and awareness of T Levels	Lack of commercial space hinders growth opportunities Freehold space a particular shortage
Survey ideas 	Qs on: - exporting activity - barriers to exporting	Qs on: - support that has assisted innovation - views on ‘creative’ economy	Qs on: - transport as a barrier to growth - need for ‘ultrafast’ broadband	Qs on: - recruitment difficulties - skills shortages - business engagement with education/training	Qs on: - lack of commercial space as barrier to growth - risks (+ opportunities?) from EU departure
	Most concentrated	Largest		Fastest growing	
Key sectors	Air transport More than 7x as large as in Great Britain Employs 16,000 workers Relatively poor recent employment change	Visitor economy 35,000 workers Not over-represented (Location Quotient of 1.0) Relatively poor recent employment change		Electrical/electronic manufacturing Employment has doubled in last 6 years Small – 1,200 workers LQ of 2 – twice as large as in Greater Britain	

International

The Greater Brighton economic area is home to a number of businesses that have a large international presence in their sector. Life sciences is well represented by exporters such as GlaxoSmithKline, Elekta and Varian, and advanced manufacturing covers exporters like Thales, Electronic Temperature Instruments (ETI) and Eurotherm. Other smaller businesses operating in international markets had the potential to export, or export more, for example Rayner Intraocular Lenses. However, an understanding of exporting activity among service sector businesses was identified as key gap in local knowledge.

Stakeholders felt that if businesses had the desire to export, and were operating in markets where exporting was possible, then there was support available to assist them in selling their goods or services overseas. Lack of leadership and management skills was seen as a major barrier to exporting.

Although stakeholders were aware that large international or multi-national firms were exporting, there was a gap in understanding the totality of export activity occurring among firms within their areas. The survey can be used to fill that gap by asking about exporting activity and about supply chain links – SMEs may not think they are exporting but may be supplying larger firms that are selling finished products overseas. Understanding the barriers to exporting can also be investigated in the survey.

Creative

Creative sectors are felt to be important in Greater Brighton, and particularly in Brighton and Hove, but they do not appear as a standard grouping within industrial classifications and so are not part of the formal sector analysis – some activity appears within the ICT sector eg games development, while the visitor economy encompasses artistic creation and theatre. Although dominated by small businesses, the creative sector does have a strong voice, and is well suited to small commercial spaces that are in relative abundance across the area, and so offers potential for development.

Creativity is also expressed through innovation, and many businesses across a range of sectors are highly innovative in their fields – for example life sciences in developing new treatments or equipment, and manufacturers such as B&W Speakers. The 2014 business survey of Greater Brighton (excluding Crawley and Mid Sussex) found that two thirds of businesses in Greater Brighton could be considered ‘innovation active’ in that they have recently introduced or are preparing to introduce new products, services or processes, higher than the national proportion.

The business survey can be used to better understand how innovation can be supported, through local business networks and sharing, or through business support services, and which organisations successful innovators identify as the key support services.

The survey can also provide insights into how to foster the wider creative economy across all relevant sectors/occupations.

Connected

The sub-region is well connected internationally with Gatwick Airport and the ports of Shoreham and Newhaven, although transport within the area has some issues – poor east-west road links, particularly in Adur and Worthing; reliability issues with north-south rail links from Brighton; some towns (eg Newhaven, Seaford) that are more remote from the trunk road network.

The survey can explore the extent to which transport problems are a barrier to growth, to investment, to recruitment, and the extent to which businesses have considered relocation because of transport difficulties. Views on the trade-offs between improved transport versus attractiveness and quality of life may also be worth investigating.

Another key connectivity issue is digital connectivity, particularly as digital sectors are a key part of the economy of some districts. There are plans for improving connectivity, for example along coastal West Sussex and in Burgess Hill, and developments such as 5G offer opportunities for new ways of working. Business views on digital connectivity may be gathered through the survey and help inform local stakeholders, among whom there were sometimes mixed views as to whether ‘ultrafast’ broadband was necessary over ‘superfast’.

Talented

Businesses require the right skills to develop and grow, and the sub-region contains a large number of education and training providers including FE and Sixth Form colleges, two universities, and specialist providers operating in key sectors such as flight schools. The workforce is generally highly educated, with a high proportion of graduates.

However, in some parts of the sub-region business find it difficult to recruit any staff, let alone staff with the right skills. Crawley, and to a less extent Mid Sussex, have more job opportunities than available labour, which causes difficulties recruiting at any level, although it is more acute at the higher occupational levels. It was felt that recruitment difficulties need to be investigated in the survey as much as skills shortages, with questions on whether businesses are experiencing them, and if so the reason and their impact, and any mitigating activities such as targeting specific segments of the labour force, such as older workers.

Interaction with the education and training system by businesses is another key issue that the survey could explore, to understand if both parties are on the same page in terms of what is meant by work readiness and employability, and to understand the level of engagement with apprenticeships (whether Levy payers use all their fund or transfer it to their supply chain) and understanding of T Levels.

The potential impact on labour supply of the UK’s departure from the European Union is another key concern among businesses, particular those in sectors that rely more heavily on migrant labour.

Resilient

Greater Brighton businesses exhibit resilience by having above average survival rates in comparison with national averages, although within the sub-region businesses in Crawley generally have lower rate of survival than those in other districts.

A number of key sectors have also exhibited resilience by outperforming the sector nationally – the life sciences sectors have grown in employment terms in the last six years whereas nationally employment has decreased, while employment growth in advanced manufacturing sectors and in insurance and financial services has been faster than the national rate of increase.

However, commercial space is often a barrier to businesses expanding and growing; suitable sized space, and freehold space, were felt to be in relatively short supply. Questions about businesses' experiences of finding the right premises, and the types and sizes of space they require, can help estate development meet business needs.

In terms of the extent to which constraints on water, energy, housing, transport and digital communications might limit the potential to grow the business base, the survey could usefully ask where businesses see future pressures or opportunities around energy, water and sustainable infrastructure.

In terms of the potential negative impact of the UK's departure from the EU, research by Centre for Cities and the Centre for Economic Performance found that Crawley was likely to be the least affected of 59 towns and cities analysed, with the lowest negative impact on gross value added under either hard or soft Brexit assumptions, although Worthing and Brighton were likely to experience much greater negative impacts. Questions about businesses' views on the key Brexit-related risks, and any potential opportunities, can help the sub-region be more resilient during this major transition period.

1 Introduction

This report presents the results of Stage One of the Greater Brighton Business Survey project.

The aim of Stage One was to undertake a desk top exercise to review available data held by GB Board members, comprising the six local authorities, the educational institutions, Coast to Capital Local Enterprise Partnership, South Downs National Park, and the business networks

This stage of the project involved a number of information gathering approaches.

1.1 Collection and review of existing reports

The websites of the range of stakeholder organisations were investigated to identify relevant research reports, and particularly those that had gathered views from businesses. In total, over 80 reports were collected and reviewed.

1.2 Interviews with key local stakeholders

A list of key stakeholders was identified in discussion with the project steering group. A mixture of face-to-face and telephone interviews were undertaken using a semi-structured topic guide agreed with the steering group. A total of 19 discussions took place with representatives from 22 organisations, and the list of organisations is presented in the Appendix.

1.3 Collection and analysis of labour market data on key sectors

The third stage involved the collection and analysis of labour market data from national data sources to provide bespoke findings regarding businesses and employment in Greater Brighton, and particularly into the key sectors within the sub-region.

1.4 Report structure

The structure of the report is as follows:

- Chapter 2 presents the key opportunities and challenges for the Greater Brighton City Region that emerged from the discussions with key stakeholders;
- Chapter 3 highlights key question areas that the business survey could focus on to address gaps in local knowledge;

- Chapter 4 presents background information about businesses and employment in the Greater Brighton area;
- Chapter 5 presents information on each of the key sectors, describing their size in terms of establishments and employment in relation to the national average, major employers, and recent trends in employment; and
- The Appendix contains the list of stakeholder organisations that were interviewed, plus raw data tables behind the figures in Chapter 4.

2 Key sectors, opportunities and challenges

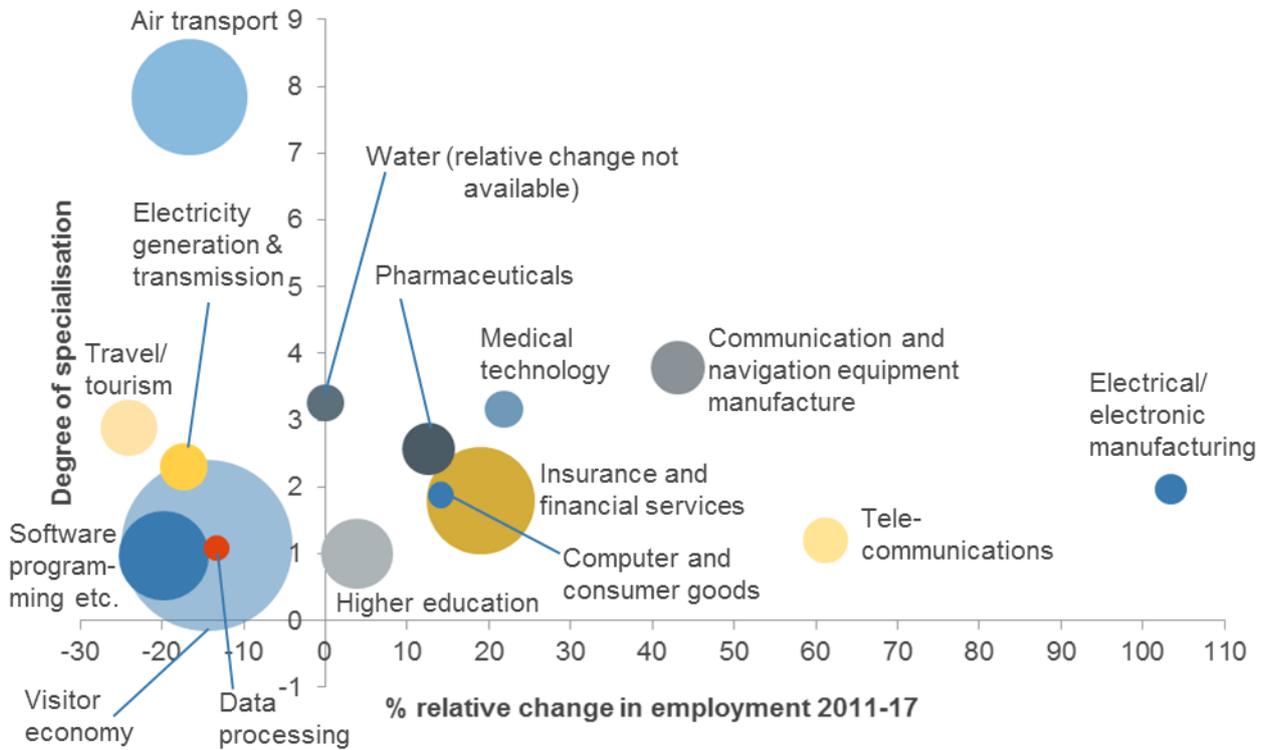
This chapter sets out key opportunities and challenges in supporting both inward investment into Greater Brighton and existing businesses to trade overseas. It draws on interviews with nineteen stakeholders from across the city region and from a desk-based review of previous research, strategies and plans. This chapter also sets out stakeholders' views on the support currently available for trade and investment, and identifies potential priorities that a new inward investment and trade team could focus on.

2.1 Key sectors

Figure 2.1 summarises the key Greater Brighton sectors in terms of their size, the degree of over-representation of employment, and their recent relative employment performance in comparison with the national change in their sector (ie the percentage change in employment in the sector in Greater Brighton between 2011 and 2017 minus the percentage change in the section nationally over the same time). Some key points to note are:

- Air transport is the most over-represented, and is the second largest in employment terms, but the relative performance has been negative;
- The visitor economy is the largest in employment terms, with around 35,000 employees;
- Electrical and electronic manufacturing has experienced the most positive relative change since 2011;
- Higher education, data processing, the visitor economy, and software programming are not particularly over-represented across Greater Brighton as a whole, and the performance of the last three of these sectors has been negative. The visitor economy is the largest in employment terms, while data processing is the smallest (along with computer and consumer good manufacture); and
- Insurance and financial services is relatively large, relatively concentrated and has had a relatively positive performance, while communication and navigation equipment manufacture is smaller but is more concentrated and has performed better.

Figure 2.1: Sector performance in Greater Brighton



Source: IES, ONS BRES data via NOMIS

2.2 Key challenges and opportunities for trade and investment

2.2.1 Challenges

Stakeholder interviews and desk research identified five main challenges for encouraging inward investment and supporting existing businesses to trade. These are taken in turn below.

Commercial space

First, the lack of availability of commercial space, or the right commercial space, was raised as a challenge by a number of interviewees and across the city region. Constraints to the availability of large-scale commercial space, primarily due to the proximity of the South Downs National Park, meant that the city region was not considered to be a viable proposition for large-scale inward investment. Interviewees from Councils and business groups in particular emphasised that their priorities were to ensure that available space is used in the best possible way to support existing businesses to grow.

Within Crawley, there was a “serious” lack of available space, with Manor Royal felt to be full and the proximity to the airport constraining any ability to build. In coastal areas, existing urban development, the sea and the South Downs provided physical and natural barriers to development – with specific concerns also raised that new commercial space was over-subscribed and had often been used for new retail developments rather than sectors with stronger growth and trade potential. In Mid Sussex, the National Park limited the scope for new development. Conversion of commercial space to residential property under permitted development created additional pressure on available space. Within Brighton and Hove specifically, it was raised that a “significant” proportion of commercial (and particularly office) space had been lost to residential use as a consequence of changes made to Permitted Development Rights in 2013. The Council had responded by exempting parts of the city centre and specific redevelopments (such as King Alfred House) from these rules, but nonetheless there was continued pressure to reclassify and redevelop space to meet demand for new housing.

It was felt that there was generally more space available for start-ups (for example shared supported offices such as Basepoint at Haywards Heath, with units from 150-500 square feet), and some space for large employers (for example The Hub in Burgess Hill, the old Amex building in Brighton, and in the longer term the Science Park) but that there was a lack of intermediate space for businesses to grow into after the start-up phase (so around the 1,000-2,000 square foot level). Where Grade A office space did become available, it tends to be snapped up quickly (with, for example, the Brinell Building in Brighton being fully let before completion).

Making space relevant for business needs, and matching the space to the types of jobs likely to be needed, was also a concern. It was felt that there could be a better understanding of what sectors need space prioritised for them, based either on *risk of relocation* because of space/ growth constraints, or on which have the *highest growth potential*. One suggested mitigation was to priorities sectors that both need less space and have high growth potential – with digital and creative businesses in Brighton being the best example of this.

As noted, concerns were raised about the balance between light industrial space and office or retail space, with some respondents considering that too much space was allocated to retail in particular – so limiting the growth potential of manufacturing businesses. In some developments, there were limits placed on the space being allocated for warehousing to ensure sufficient space is allocated for (potentially) higher gross value added sectors.

Transport

Transport issues were also raised by interviewees across the Greater Brighton area. The poor A27 road links west of Shoreham were seen as a big problem, which had been seen as contributing to specific companies relocating all or part of their operations (with the movement of Body Shop staff from Littlehampton to East Croydon given as an example), and A259 east of Brighton was also raised as an issue. These were also felt to have inhibited growth for other businesses. Both the availability and frequency of rail and bus

links were felt to be a barrier to staff using other forms of transport. One interviewee described this as creating a “120 degree economy”, limited both by the sea and by coastal connectivity.

Beyond the A27 and A259 issues, the reliability and cost of north-south rail links were also raised as issues, with the regular scheduled and unscheduled disruption affecting both the perceptions of Greater Brighton as a place to invest, and the reality of improved connectivity into Gatwick and London. North of the coast, a range of local road transport issues were raised – including congestion/ parking problems for Manor Royal (with 30,000 people working in a one square mile area served by a 1950s road network).

Understanding the impact of transport on businesses’ productivity and ability to attract staff was seen as a priority for the survey, to add weight to development of strategic transport initiatives.

Skills

There was a commonly-expressed view that schools needed to do more to prepare young people for the world of work. For example, those businesses accessing the LEP’s Escalator Programme identified skills as the single biggest challenge that they faced. This was most often framed by interviewees around general work-related or employability skills like time management, team work, communications and so on; but a number of respondents also identified specific occupational issues particularly related to science, technology, engineering and maths (STEM). A range of high potential sectors including life sciences, advanced manufacturing/ engineering, digital/ IT and professional services (such as accountancy and finance) relied on STEM skills. So both opening up young people to the possibilities of working in these areas and challenging gender and occupational segregation were seen as key priorities. However, in some areas away from the spine of the City Region (eg Lewes and Newhaven) it was felt that work was needed to raise aspirations and skill levels.

Linked to this, there was a common concern that vocational routes were often not prioritised by schools or young people, and that changes to apprenticeships (including the introduction of the Levy) had made this more challenging by increasing costs and barriers for businesses.

Looking at the range of provision available across Greater Brighton, one interviewee commented that we are “surrounded by educational excellence” – including the two Universities, very good further education and sixth form colleges, a range of good and outstanding schools, and non-state provision including Lancing College, flight schools, and even the football club. The challenge was more in how to harness this at a time of funding pressures and significant change – so for example while interviewees in Crawley felt that Crawley College was responsive to the engineering/ manufacturing needs of local employers and that the two universities were regularly engaging with local employers for work placements and knowledge transfer, interviewees in Mid Sussex highlighted that the closure of the Central Sussex College campus in Haywards Heath had limited local options (although it was hoped that provision in the town would be up and running again from September 2020).

Given the presence of the two Universities within Greater Brighton (and Chichester on its border), another key concern raised was in both retaining talent within Greater Brighton and ensuring that these (mainly) young people were able to work in good quality, high value-added work.

Finally, inevitably, a number of interviewees raised concerns about the impacts on the availability of skills and talent as a consequence of the decision to leave the European Union. This was flagged as a risk by a number of those who were engaged with businesses in high-growth sectors already trading overseas (where effectively their labour and product markets are already international) but also by those engaging with sectors with less advanced skills requirements – for example the visitor economy in Brighton and Hove. In many cases negative impacts were already being felt, likely as a consequence of currency depreciation and the uncertainty about future rights.

For the survey, it will be important to explore in more depth the nature and extent of skills challenges, and potentially to draw out how far the above pressures may lead to increased competition between firms, and/ or potentially greater investment in developing skills and capabilities (although this is less strictly relevant to the specific trade/ investment focus of the survey).

Capacity and capability

Fourthly, there were mixed views about the managerial capability of businesses. In general it was felt that businesses were well managed, and some had access to technical support to export including export finance. Some respondents considered that the management capacity and capability of businesses were significant barriers to trade and export, although in general this was not an area that respondents had very strong or negative views on. It may therefore be a gap worth exploring in more depth in the phase two survey.

There were stronger views on other issues affecting capacity and capability. Some interviewees raised concerns about business access to the finance needed to grow and to trade – with one asking “*where are the venture capitalists to finance this investment?*” Others emphasised a lack of business-to-business support for exporting and growth – specifically around the sorts of networking and mentoring that may help businesses navigate new markets. Linked to this were concerns around the fragmentation of formal business support provision (discussed further later in this chapter).

A major capacity issue in Crawley, and to a lesser extent in Mid Sussex, was difficulty recruiting staff – more of a labour shortage than a skills shortage issue. Crawley has the highest jobs density of all local authority districts in the South East, with 1.4 jobs per local working age resident in 2017 (Brighton, Mid Sussex and Worthing have around 0.85 jobs per resident, Lewes 0.7 jobs, and Adur 0.6 jobs). One interviewee stated that there was one available jobseeker for every five jobs in Crawley, and one to four in Mid Sussex. Although this shortage was more acute at the higher end of the occupational scale, labour shortages existed at all levels – and it was felt that it was important to separate out general recruitment difficulties from specific skills shortages, as they required different approaches to address.

Infrastructure

Finally, a small number of interviewees raised specific concerns about infrastructure constraints within Greater Brighton. These were generally framed as more future-facing challenges – in terms of how constraints on water, energy, housing, transport and digital communications will continue to limit the potential to grow the business base. In the longer term, Greater Brighton would need to see a transition towards more sustainable approaches to energy and water use in particular, as well as continued investment in improvements to digital connectivity (which was currently a particular concern among rural areas where it was felt to be particularly important for facilitating business and remote-working).

2.2.2 Opportunities

Four main areas of opportunity were identified in discussions with interviewees, which are set out below. These also reflect many of the opportunity areas identified in economic strategies and reviews, including the Brighton and Hove Economic Strategy published last year (although notably, no respondents identified digital public service transformation as a specific opportunity area).

Building on growth sectors

The sector analysis has shown that a number of key sectors in Greater Brighton have been growing rapidly in the last few years and outperforming the growth in those sectors nationally. Employment in the electrical and electronic manufacturing sector in Greater Brighton has doubled in the last six years while nationally it has been flat; employment in telecoms has increased by around 50 per cent locally compared with a fall nationally of 12 per cent; and employment in the communication and navigation equipment manufacturing sector has increased by 44 per cent compared with a one per cent increase nationally. Other key sectors with solid if less spectacular growth include pharmaceuticals, medical technology, and insurance and financial services.

Although there has been growth in employment in the computer software programming and publishing, and data processing and hosting sectors, this has not been as large as it has been across the country as a whole (with increases locally of around 20 per cent in the last six years compared with more than 30 per cent nationally). Creative sectors were felt to be a strength across Greater Brighton, with for example Crawley keen to grow its digital sectors as a midpoint between two strong digital centres in Brighton and Croydon and existing strengths around data processing and hosting). Overall while the number of firms and levels of employment in digital and creative sectors were generally small (and not clearly identified in standard classifications), the sectors were seen as a strong voice which can be used to attract and grow business.

So there are a range of opportunities to support existing companies in key sectors to expand. A further priority identified in interviews was to reduce the risks of business moving outside the city region when they reach a certain size. Thinking about and presenting Greater Brighton as a single economic area would be key to this. For example,

Brighton and Worthing were both seen as good places to start a business but not always to grow a business – so as well as supporting business growth in these places, the city region could also do more to support relocation to places like Newhaven or Burgess Hill (rather than say Reading or Swindon) when a business outgrows its space.

Growing the resident workforce

A number of respondents identified that there were a range of opportunities to increase participation in the labour market, and that this was particularly pressing given the labour and skills shortages identified earlier in the chapter. A number of current good practices were identified, including European Social Fund programmes to support disabled people, parents and other disadvantaged groups; work with prison leavers in Ford (just outside the city region, but with potential applicability to Lewes Prison too); and the trialling of a new “Individual Placement and Support” model for those with problem drug or alcohol use in Brighton and Hove.

It was felt that better co-ordination of, and signposting to, this provision – alongside partnership work with Jobcentre Plus, service providers and schools and colleges – could play an important part in helping to address skills and labour needs.

Reskilling and upskilling the workforce

In addition to having sufficient labour available, businesses also need the right skills to succeed. Focusing on priority sectors and engaging with those employers should enable local partners and colleges/ training providers to ensure that the right skills are available at the right time and in the right places, but again this is critically dependent on local co-ordination as well as responsive funding and delivery.

Inevitably, Apprenticeships were seen as the main means of helping to meet future skills needs. For levy-paying employers, specific opportunities were identified in encouraging the transfer of unspent funds to supply chains, and in bringing together public sector levy-payers to support sector-wide initiatives (for example in finance, accounting, health services care and so on). For non-levy employers, partners could play a key role in helping to promote opportunities and to convene businesses and suppliers.

Retaining more graduates within the sub-region is also a key opportunity. For example, research by Centre for Cities found that only 15 per cent of Crawley residents who went to university studied in Brighton, and only one third of graduates returned to Crawley after their studies (with the pull of London likely to be an influence). Both universities felt that their graduates are keen to stay local, if the work opportunities were there –the careers services can play a key role in encouraging graduates to consider and look for opportunities across the whole Greater Brighton area.

Bringing together research, innovation and growth

The two universities were involved in a range of business engagement activity – including placement opportunities for students, Knowledge Transfer Partnerships that benefit businesses, academics and graduates, and a 1-3 year strategic project part-funded by the

government. Both universities also draw on academic staff that have come from key local employers, including Ricardo and GlaxoSmithKline.

Engagement activity occurred at many levels – including individual academics having links with particular businesses, industry advisory boards or research enterprise directors with a more strategic focus on the links between the curriculum/ research and what businesses priorities were, and the Sussex Innovation Centre providing incubator support for business start-ups. The Knowledge Exchange Framework from 2020 will also encourage more formal measuring of business engagement activities as institution-level performance will be compared.

Notwithstanding this, a range of barriers to converting research support into business support were identified – and some respondents felt that these issues were often glossed over by central government. Nonetheless, there were clear future opportunities identified to further bring together, co-ordinate and support the take-up of research and innovation by businesses.

2.2.3 Wider Brexit impacts

Research into the potential impact of the UK's departure from the European Union on Greater Brighton, or the major centres within it, has been undertaken by the UK Trade Policy Observatory (UKTPO) at the University of Sussex, and by the Centre for Cities. The UKTPO report¹ investigated the likely impact of a No-Deal Brexit on constituencies in Hampshire and Sussex, and estimated that the employment loss in Greater Brighton would be around 10,000 workers/employed residents, representing around 2.5 per cent of the total. Crawley is predicted to be least affected, with losses representing 1.6 per cent of workers and 2.2 per cent of employed residents, while East Worthing and Shoreham, and Brighton Pavilion, are predicted to experience the largest losses among workers (3.1% and 2.9% respectively) and Worthing West and Brighton Kemptown are predicted to experience the largest losses among residents (3.6% and 3.5% respectively). The Centre for Cities/Centre for Economic Performance report² found that Crawley is likely to experience the smallest impact on Gross Value Added (GVA) of 62 major towns and cities investigated, although Worthing is in the top five worst affected, and Brighton is predicted to be relatively badly hit under the Hard Brexit scenario.

Interviewees mentioned a number of significant potential impacts resulting from the UK's departure, in addition to the challenges and opportunities set out above, including:

- **Workforce.** As noted, some local businesses were already reporting struggling with workforce issues related to Brexit, while there were concerns about businesses having to check the legal status of workers after Brexit. These concerns were particular severe

¹ The Brexit Burden: A Constituency Level Analysis For Hampshire And Sussex

<http://blogs.sussex.ac.uk/uktpo/files/2018/11/Briefing-paper-26-F.pdf>

² Brexit, trade and the economic impacts on UK cities <https://www.centreforcities.org/wp-content/uploads/2017/07/17-07-26-Brexit-trade-and-the-economic-impacts-on-UK-cities.pdf>

among sectors that rely more heavily upon migrant labour, such as the visitor economy.

- **Markets and regulation.** Concerns were raised that key local businesses in regulated sectors, for example pharmaceuticals, may lose access to European markets and so in the worst case could be led to move production to inside the EU. Related to this, those providing overseas services could see their UK standards no longer recognised and so have had to seek accreditation through overseas regulators. This could potentially be a “disaster” for the life sciences sector in particular. In agriculture (important in the rural districts and a LEP priority sector) lamb and dairy farming were felt to be particularly vulnerable if current tariffs were removed and markets were opened up so that British farmers were competing with cheaper goods from other countries such as New Zealand.
- **Access to grants,** for example Horizon 2020 and research and development frameworks, will be more difficult and opportunities to collaborate across Europe and get R&D funding will be reduced – although it was felt that these funding streams were generally under-used by businesses currently.
- **General disruption to transport** (including supply chains) and to travel were frequently raised by interviewees. This could be particularly acute around Gatwick and Newhaven, but spillover from disruption across the wider south east was also a significant concern, and it was a particular risk for organisations reliant on ‘*just-in-time*’ supply chains. Congestion on trunk and local roads due to disruption at the ports was also mentioned.

2.3 Business support

2.3.1 The current picture

Interviewees pointed to an often complex picture of business support, with some sectors, needs and parts of the business base well-served while others have far more limited support. This is set out in more detail below.

Business support currently prioritises high-potential, high growth sectors

While existing government-backed support is available for all businesses, specific support programmes are felt to be mainly focused on smaller companies with higher growth potential. For example, the LEP’s new Escalator Programme is aimed at supporting companies to scale up where they have turnover of around £1 million and 20% growth per annum. This Programme is currently being piloted (including one in Brighton and Hove), with support comprising peer-to-peer groups and expert facilitation. LEP “growth champions” also provide access to business support and expertise.

At the other end of the spectrum, it was felt that very large and well established companies generally did not need or seek business support – and often had relationships with the Department for Business and/ or the Department for International Trade already.

There may be a need for targeted engagement to encourage businesses to *stay* (covered in more detail below), but there was no need for support to *trade or grow*.

So in between these two extremes, a number of interviewees raised concerns that changes to central government funding and organisation had meant that support was missing for mid-size companies with the potential to export but who needed help to do so (in terms of capability, understanding and often even creating the appetite and space to do so). A range of examples were given of specific companies who could benefit from this sort of support, but currently were not a priority.

Specific trade support tends to focus on addressing technical requirements

Beyond support targeted at specific types of business, there is a range of support available across the city region through the Sussex Chambers of Commerce. This includes technical support with export certification, delivery of an Export Documentation Service, guidance on export finance and access to support with finance and insurance. Worthing and Adur Council also reported that they were working with the Chambers to signpost businesses to specialist tax and financial support.

Looking ahead, the LEP also identified that they would be allocating up to £2 million for export support in the near future – likely to employ two new staff, focused respectively on Asia and on the Rest of the World.

However, no respondents identified sources of business-to-business support for trade and export specifically – for example in supporting managers to navigate the system; getting the right skills to export; understanding overseas markets; and so on. The Chambers identified peer-to-peer support as a key priority for the future.

Wider business support can be complementary to trade and export

Notwithstanding this, a range of wider business support not specifically focused on trade and export was identified across Greater Brighton. This included the support available through the Sussex Innovation Centre described earlier in this chapter; new facilities to support innovation that would be coming on stream in future (most notably at the Preston Barracks development); networking opportunities through Council and business networks; and private sector-delivered support including MDHUB (providing peer-to-peer learning and support to senior managers). This provision was all seen as being potentially complementary to, and supportive of, an improved trade and investment offer.

Overall, the business support market is fragmented and hard to navigate

Finally, a common concern raised by respondents was that business support beyond the Chambers and LEP was hard to find and hard to navigate. It was felt that improving the co-ordination and navigation of support already available would be just as important as filling gaps in the current offer – by linking up the range of wider business support available in a similar but more targeted way to the online LEP resources.

2.3.2 Priorities for business support

Five broad priorities for future business support were identified, and provide a useful starting point for exploring and testing through the survey:

- **Targeting mid-sized businesses that have the capability but not the expertise to export.** Examples were given of medium sized employers that may not have strong year-on-year growth but would be well capable of exporting with the right support. Many of these companies are well known to councils and business partnerships so could be targeted directly, and are currently not prioritised for existing trade support.
- **Addressing practical barriers to trade and export.** A range of technical support is already available through the Chambers in particular, but relatively less support is available to help companies build the skills needed to export, develop business plans, understand and analyse potential markets, make the right connections and access ‘critical friend’ or peer-to-peer help.
- **Retaining successful companies.** As noted, retaining successful companies was often considered to be just as important as developing new ones. The old SEEDA Investor Development Network was highlighted as a good model to build on – helping larger employers to make the business case to maintain investment, supporting them to develop their supply chains and engage in their local area, and helping them to make the most of locally available support.
- **Co-ordinating and knitting together existing provision.** As set out above, this should include the range of wider business provision available in Greater Brighton, specific technical provision to trade overseas, and targeted provision for growing companies. Beyond this, there are also opportunities to link up with the opportunities set out earlier in this chapter – including around apprenticeships, education and workforce participation.
- **Providing ongoing support.** Finally, a number of respondents noted that the fragmentation and confusion around support was in part a consequence of support tending to be relatively short-term and ring-fenced. Building longer-term and more holistic relationships, based on account management and dialogue rather than one-off support would be highly desirable (although in practice also challenging to achieve).

3 Topic areas for survey

Drawing the findings together, this chapters sets out headline views on the implications of our findings for the business survey planned for phase two. These are framed around the five strategic themes identified by the Greater Brighton Economic Board – for an international, creative, connected, talented and resilient city region.

3.1 International

Questions to understand current exporting behaviour, and current supply chains, plus opportunities for/barriers to exporting:

- What is happening now in terms of exports – who is exporting (particularly in the service sectors), what is the value of those exports and what markets are they exporting to?
- Understanding supply chains – who are businesses supplying and supplied by?
- What are the practical barriers to trade, getting underneath the headline challenges and understanding what is driving these?
- Market gaps. Don't have comprehensive list of service exporters, need to use survey to get to this if we can!

3.2 Creative

Questions to explore the opportunities for and barriers to innovation and the creative economy:

- Supporting innovation – are businesses aware of the support available, how do they innovate now and who are they working with?
- Where are the blockages and how can these be addressed (in particular between ideas and markets)?
- Creative economy – which businesses are in it, how big is it, what are its unique opportunities and challenges?

3.3 Connected

Questions to understand opportunities and barriers to connecting businesses with each other, their workforce and their markets:

- Transport – getting beneath the headlines, how does transport constrain growth, inhibit investment or encourage companies to consider leaving? How do companies value the trade-offs between transport, location, access to skills, quality of life?
- Digital – what are the opportunities of digital transformation, including 5G connectivity; what are the risks; what does Greater Brighton need to do to maintain advantage?
- Networks and sharing – how do businesses collaborate, which services and networks do they use, what has worked before and what more do they need?

3.4 Talented

Questions on getting the right skills in the right places at the right times:

- Beneath the headlines, what is driving skills shortages and how are these being felt? At what levels, in what areas, over what time?
- What solutions are businesses investing in or considering – particularly around developing their workforce, engaging with education and skills, recruiting in different ways?
- What specifically do employers need from the education system – what are the work readiness, employability and workplace skills?
- How could businesses be better supported to invest in training and development – through the Levy (including supply chains) and/ or in other ways?
- Are recruitment difficulties harming growth, if so how, and are businesses considering moving?
- How do businesses view the opportunities to recruit and develop more people from the resident workforce – including disabled people, older workers and parents?

3.5 Resilient

Questions relating to infrastructure, space and contingency planning:

- What are businesses' experiences of finding the right premises – where is it, can you afford it, and what are the issues/ challenges?
- What types and sizes of space do businesses need to expand?
- Where do employers see future pressures or opportunities around energy, water and sustainable infrastructure?

- Where are the key Brexit-related risks – to markets, skills, accreditation, etc? Where are there opportunities?

4 Greater Brighton business profile

In this chapter we present information on the business profile of the Greater Brighton City Region in broad terms, looking at number of establishments, business start-up and death rates, average establishment size, and business survival rates.

4.1 Establishments in Greater Brighton

In 2018 there were 41,300 business establishments in Greater Brighton. The broad industrial breakdown (1-digit SIC) is presented in **Error! Reference source not found.**, in comparison with the national profile. The largest sectors in terms of numbers of establishments are:

- Professional, scientific and technical activities (16.9% of all establishments);
- Wholesale and retail trade (16.6%);
- Construction (11.0%); and
- Information and communication (10.1%).

In comparison with the national distribution, there are few substantial over-representations of sectors in Greater Brighton. The largest over-representation is in information and communication, which accounts for 10.1 per cent of Greater Brighton establishments compared with 7.4 per cent nationally, and arts, entertainment and recreation, which accounts for 3.5 per cent locally and 2.7 per cent nationally. There are substantial under-representations in the agriculture, mining, manufacturing, water supply and public administration sectors, as well as in transportation and storage despite Gatwick.

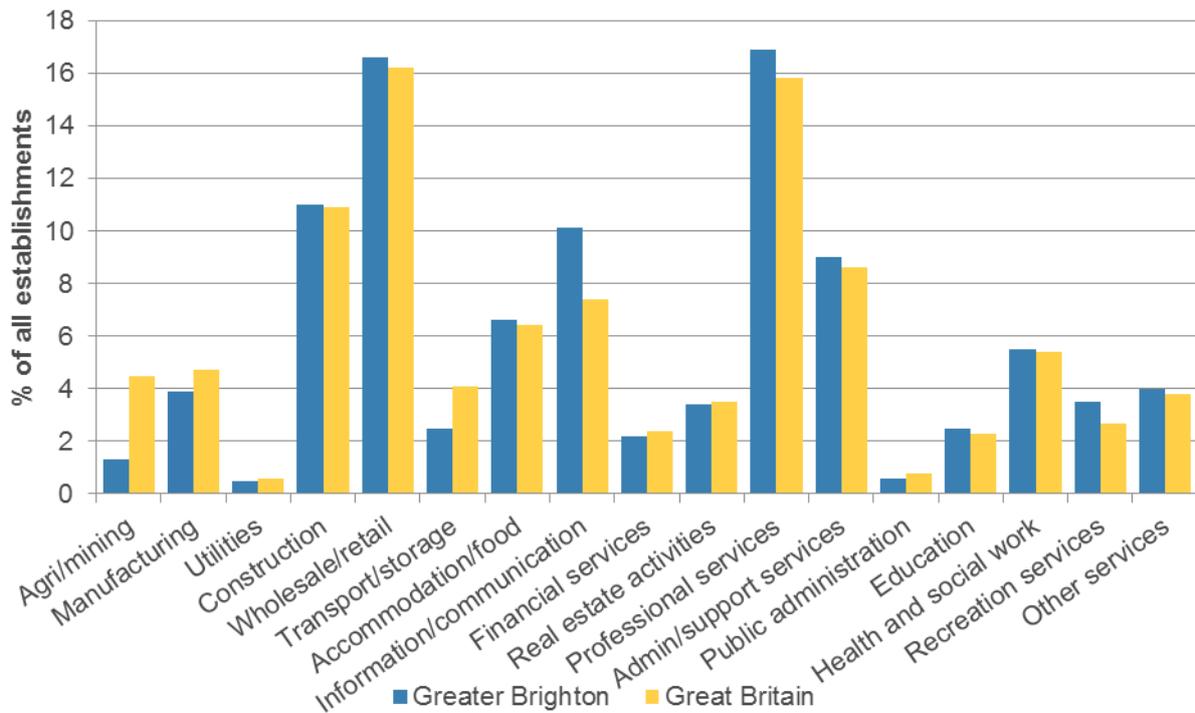
Brighton and Hove accounts for nearly two fifths (39.2%) of all establishments in Greater Brighton, while Mid Sussex accounts for 20 per cent, Crawley, Lewes and Mid Sussex each account for just over 10 per cent, and Adur accounts for seven per cent.

The industrial profile for each district is present in Table 20. Key district specialisms are:

- Manufacturing is over-represented in Adur (6.7% of all establishments), and to a lesser extent in Lewes (5.4%, compared with 4.7% nationally)
- Establishments in the electricity and gas sector account for 1.1 per cent of all establishments in Crawley (0.2% nationally)
- Water supply establishments are over-represented in Adur and Lewes (0.7% and 0.5% respectively, compared with 0.4% nationally)
- Construction is over-represented in Adur (17.5% compared with 10.9% nationally)

- Crawley has twice as many transport and storage establishments as the national average (7.9% compared with 4.1% nationally)

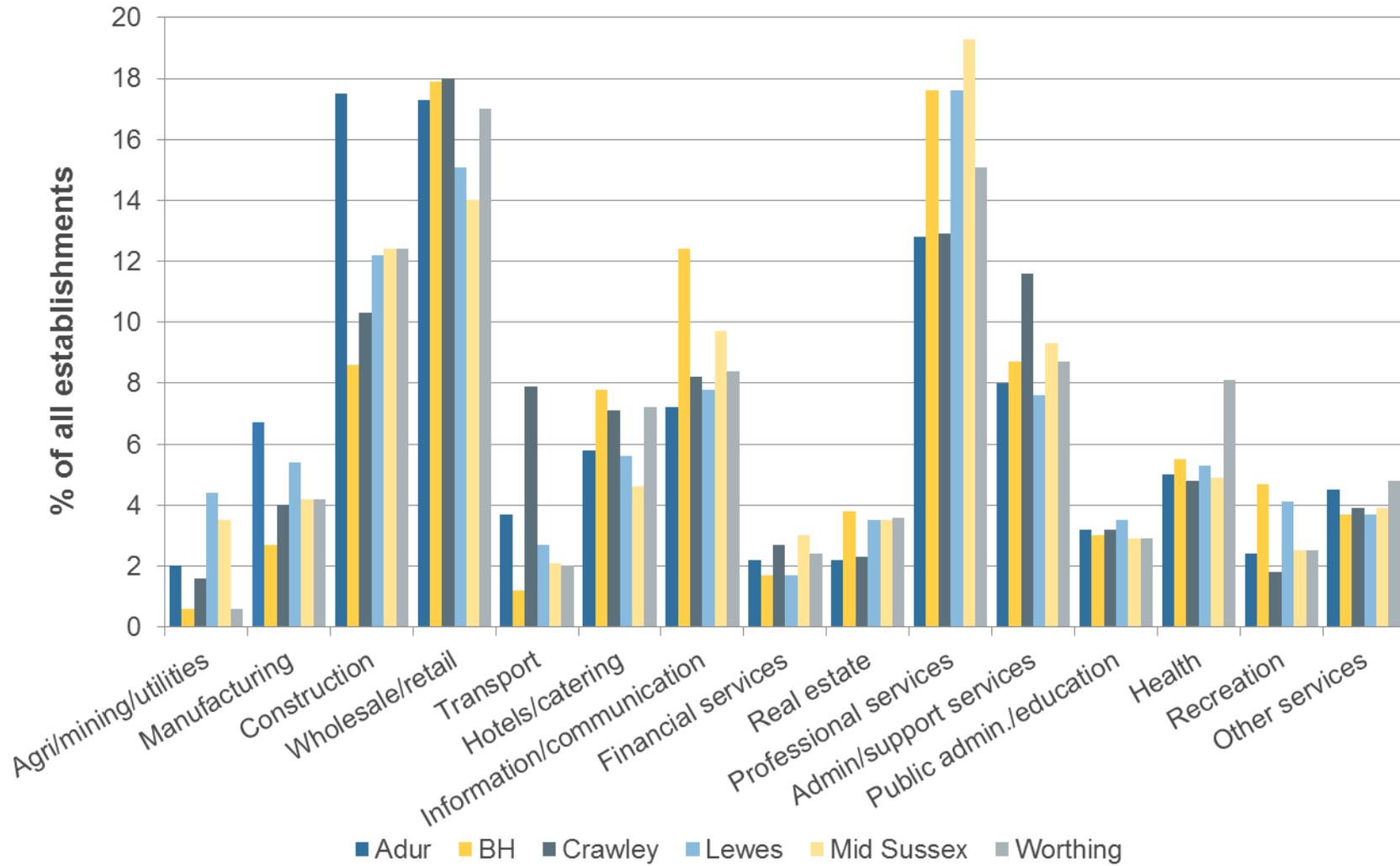
Figure 4.1: Establishments by industrial sector, Greater Brighton, 2018 (%)



Source: ONS Business Count via NOMIS

- Information and communication establishments are over-represented in Brighton and Hove (12.4%) and Mid Sussex (9.7%, compared with 7.4% nationally)
- Mid Sussex has an above average proportion of establishments in professional, scientific and technical activities (19.3% compared with 15.8% nationally)
- Administrative and support service activities are over-represented in Crawley (11.6%, compared with 8.6% nationally)
- Establishments in the arts, entertainment and recreation account for 4.7 per cent of all establishments in Brighton and Hove, and 4.1 per cent of all those in Lewes (2.7% nationally)
- Worthing has over-representations of establishments in health and social care (8.1%, compared with 5.4% nationally) and other service activities (4.8%, compared with 3.8% nationally).

Figure 4.2: Establishments by sector and Greater Brighton district, 2018 (%)



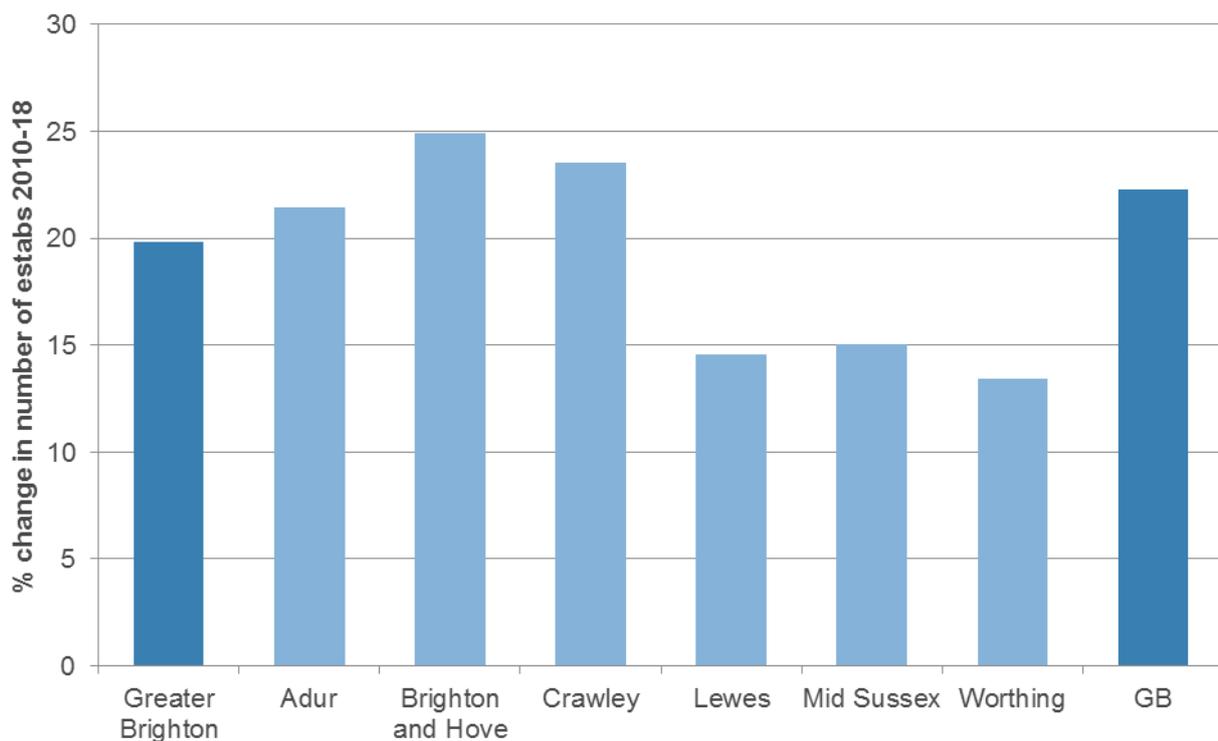
Source: ONS Business Count via NOMIS

4.2 Recent trends in establishments

The number of establishments in Greater Brighton increased from around 34,500 in 2010 to 41,300 in 2018, an increase of 20 per cent. However this is below the national increase in the number of establishments over this period of 22 per cent.

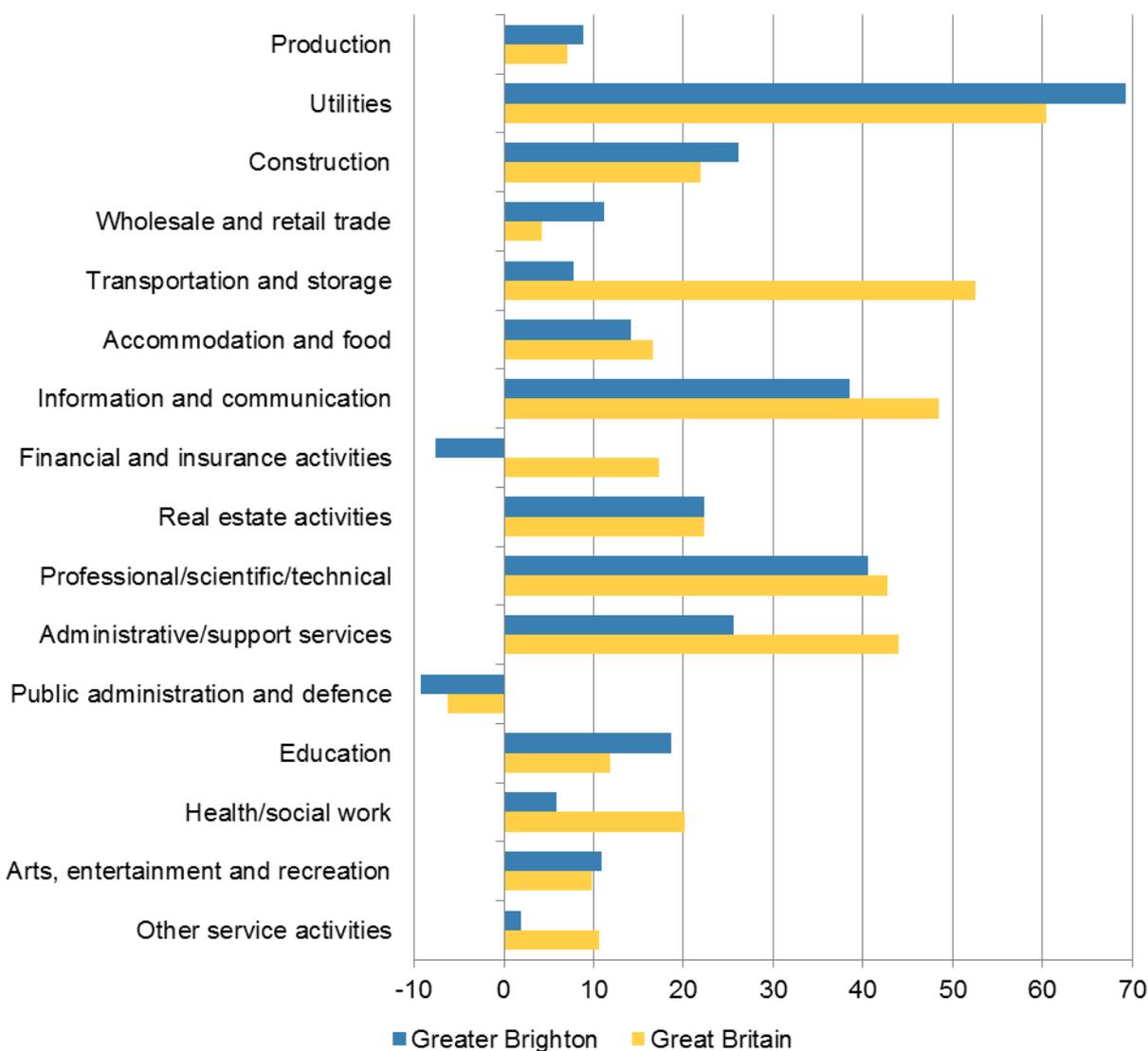
Within the Greater Brighton area, Brighton and Hove experienced the largest increase in the number of establishments, at 25 per cent, followed by Crawley (24%) and Adur (21%), while in the other three districts the increase was less than 15 per cent (Figure 4.3).

Figure 4.3: Increase in number of establishments by local council, 2010-18 (%)



Source: ONS Business Count via NOMIS

Figure 4.4 shows the recent trend in the number of establishments by sector in Greater Brighton, in comparison with Great Britain. In Greater Brighton there have been decreases in the number of establishments in finance and insurance, and in public administration, while nationally the number of establishments in finance and insurance increased by 17 per cent between 2010 and 2018. There were also smaller than average increases in the numbers of establishments in transport and storage, information and communication, administrative and support services, health and social work, and other services.

Figure 4.4: Change in number of establishments by sector, 2010-18 (%)

Source: ONS Business Count via NOMIS

4.3 Average establishment size

The average size of Greater Brighton establishments in the different sectors are shown in Table 1, in comparison with the national average size.

Greater Brighton establishments are larger than average in the utilities sectors (electricity, gas and water), transportation and storage, financial and insurance activities and public administration. This reflects major employers operating in these sectors in Greater Brighton – EDF and Southern Water in utilities, Gatwick Airport and supporting activities in transport, large financial sector companies such as Legal and General and American Express.

However, manufacturing establishments are somewhat smaller than average – 13 employees compared with 17 in the country as a whole – as are establishments in the

information and communication technology sector (3.8 employees compared with 5.7 in Great Britain).

Table 1 Average size of establishments in descending order of size (number of employees)

	Gtr Bton	GB
Public administration and defence	62.4	53.8
Education	35.2	34.7
Electricity, gas	33.9	24.1
Transportation and storage	28.3	11.2
Water supply etc	27.3	18.6
Human health and social work activities	23.6	22.3
Financial and insurance activities	20.1	14.2
Manufacturing	12.8	17.0
Accommodation and food	11.9	11.7
Administrative and support service activities	10.4	10.0
Wholesale and retail trade	9.0	9.1
Arts, entertainment and recreation	7.4	9.2
Other service activities	5.5	5.1
Real estate activities	4.4	4.6
Information and communication	3.8	5.7
Construction	3.5	4.4
Professional, scientific and technical activities	3.4	5.0
Mining and quarrying	2.7	26.5
Agriculture, forestry and fishing	1.8	1.6
All sectors	9.6	9.7

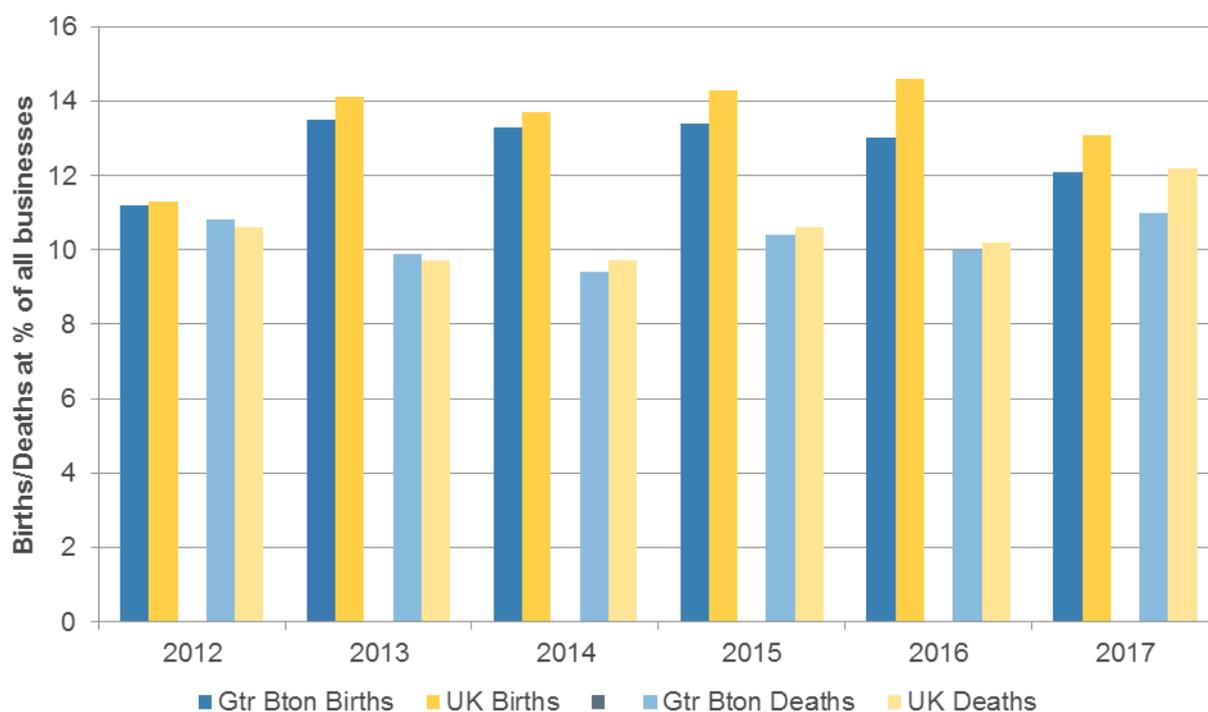
Source: ONS Business Count via NOMIS

4.4 Business birth and death rates

Error! Reference source not found. presents information on the birth and death rates of enterprises in Greater Brighton, from business demography data which cover enterprises rather than establishments.

There is slightly lower ‘dynamism’ in Greater Brighton than in the country as a whole, with slightly lower birth and death rates. The birth rate has been slightly lower than the UK rate for the last six years, with the gap widening somewhat from 2015 onwards, while the death rate was very close to the national rate in 2012 and 2013, before falling below the national rate, with the gap largest in the most recent year.

Looking within Greater Brighton, the birth rate of new enterprises has been highest in Brighton and Hove, and Crawley, with relatively little variation between the other four districts, and the death rate has also tended to be higher in Brighton and Hove and Crawley (see appendix table).

Figure 4.5: Birth rates of new enterprises and death rates of enterprises 2012-17 (%)

Source: ONS Business demography, UK

4.5 Business survival

Although there are relatively fewer business births and deaths in Greater Brighton than in the country as a whole, business survival rates are on average better. Table 2 shows the 1-year, 3-year and 5-year survival rates by the year of business birth for business in Greater Brighton compared with the UK, and shows that survival rates are generally higher in Greater Brighton, particularly the 3-year survival rates.

Table 2 Business survival rates by year of birth, Greater Brighton and UK (%)

	2012	2013	2014	2015	2016
Gtr Bton 1 year	91.6	93.4	92.6	91.1	92.2
UK 1 year	91.3	93.5	92.2	89.7	91.5
Gtr Bton 3 year	61.4	63.8	63.3	-	-
UK 3 year	59.4	60.9	61.2	-	-
Gtr Bton 5 year	45.0	-	-	-	-
UK 5 year	43.2	-	-	-	-

Source: ONS Business demography, UK

Table 3 shows survival rates by district within Greater Brighton, for business births in 2012, 2014 and 2016. Crawley has generally had the lowest survival rates, and although

the patterns have fluctuated somewhat over time, Lewes, Mid Sussex and Worthing have generally had above average survival rates.

Table 3 Business survival rates by year of birth, districts in Greater Brighton (%)

Birth year Survival	2012					2014			2016
	1-year	2-year	3-year	4-year	5-year	1-year	2-year	3-year	1-year
Adur	90.9	75.0	61.4	50.0	43.2	94.4	81.5	68.5	93.4
Brighton & Hove	91.4	74.1	59.9	50.3	43.2	92.4	76.8	61.9	92.5
Crawley	87.5	75.0	57.5	47.5	42.5	90.3	75.3	62.4	89.9
Lewes	93.3	77.3	65.3	57.3	48.0	93.9	77.6	65.3	91.8
Mid Sussex	93.5	79.1	64.0	55.4	48.9	92.8	77.9	63.5	92.1
Worthing	91.7	76.2	63.1	53.6	46.4	92.4	78.1	64.8	93.5
Greater Brighton	91.6	75.7	61.4	52.0	45.0	92.6	77.3	63.3	92.2

Source: ONS Business demography, UK

5 Key sectors in Greater Brighton

Having looked at the overall business and employment picture in Greater Brighton, this chapter looks in detail at the situation for the different key sectors in the sub-region.

As a first step, the priority sectors identified by Coast to Capital Local Enterprise Partnership (LEP) were reviewed to assess the extent to which they over-represented in the Greater Brighton City Region. Secondly, data on the employment size and degree of over-representation of detailed sectors in Greater Brighton were analysed to identify key sectors that are not LEP priority sectors. Table 4 shows the sectors that were identified, along with their 2017 employment level and location quotient figure (the proportion of Greater Brighton employment divided by the proportion of national employment; a figure above 1.0 represents an over-representation of employment locally), plus the districts in Greater Brighton in which the sectors are concentrated.

Table 4 Key sectors in the Greater Brighton City Region

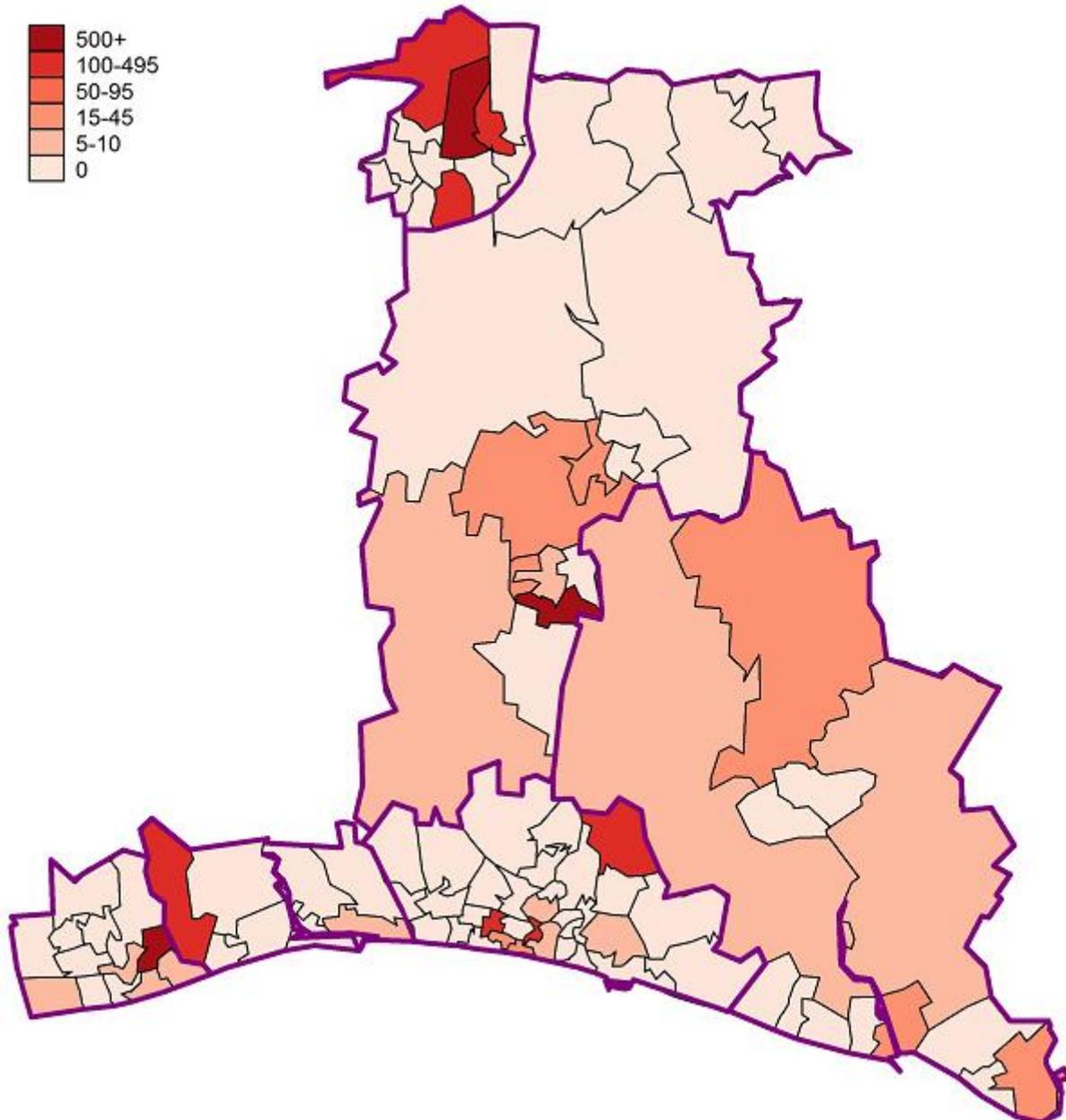
Broad sector	Sector	LEP/ GBEB	Employees	LQ	Key Locations
Life sciences	Pharmaceuticals	LEP	3,300	2.6	C, MS, W
	Medical technology	LEP	1,700	3.2	A, C, W
Advanced Manufacturing	Computer and consumer goods	LEP	850	1.9	W
Manufacturing	Communication and navigation equipment	LEP	3,400	3.8	C
	Electrical and electronic manufacturing	GBEB	1,100	2.0	C, L, MS
Utilities	Electricity generation and transmission	LEP	2,750	2.3	BH, C
	Water supply	GBEB	1,600	3.3	BH, W
	Air transport	LEP	16,000	7.8	C
Information & Communication Technology	Telecommunications	LEP	2,400	1.2	A, BH, C
	Computer software programming/ publishing	LEP	9,600	1.1	BH, C
	Data processing and hosting	LEP	700	1.1	C
	Insurance and financial services	LEP	14,000	1.8	BH, C, MS, W
Visitor Economy	Travel and tourism	GBEB	3,700	2.9	BH, C
Economy	Visitor economy	LEP	35,000	1.1	BH, L
	Higher Education	GBEB	6,000	1.0	BH

Source: IES, ONS BRES data via NOMIS

5.1 Life sciences

There are two key sectors that fall under the life sciences heading – pharmaceuticals, and medical technology. Figure 5.1 shows the distribution of life sciences employment across the Greater Brighton area, and shows concentrations in Crawley, Burgess Hill, Worthing, and some parts of Brighton and Hove.

Figure 5.1: Employment in life sciences sectors by local area, 2017



Source: ONS BRES data via NOMIS

5.1.1 Pharmaceuticals (manufacture and distribution)

Across Greater Brighton the pharmaceutical sector employs around 3,300 employees in 65 establishments. The proportion of employment accounted for by the sector is 2.6 times the national average (0.84% compared with 0.33% in Great Britain).

Table 5 Sector summary for pharmaceuticals sector

Pharmaceuticals	
Sector definition	2120 : Manufacture of pharmaceutical preparations 4646 : Wholesale of pharmaceutical goods
Establishments - Gtr Bton	65
Establishments - GB	3,445
Establishment -LQ	1.4
Employees - Gtr Bton	3,300
Employees - GB	97,000
Employees - LQ	2.6

Source: ONS BRES data via NOMIS

The sector is heavily concentrated in Worthing, with the large GlaxoSmithKline site (c. 900 employees) as well as Allergy Therapeutics (c. 350 employees) in East Worthing; the location quotient for pharmaceuticals in Worthing is 8.3. As a multi-national, GSK have less involvement in local business discussions with the council than a UK-based employer of their size would.

Other major employers include Novo Nordisk (c. 500 employees) in Crawley and Roche Diagnostics (c. 500+ employees) in Burgess Hill, and smaller employers in the sector include Destiny Pharma and Custom Pharma Services in Brighton and Hove, Bard at Tilgate in Crawley, and CSL Behring in Haywards Heath. The LQ for Mid Sussex is 3.9 and for Crawley is 2.9.

Employment in the pharmaceuticals sector in Greater Brighton has increased by nearly 12 per cent from 2011 to 2017, with the number of employees increasing by around 300. Nationally, employment in the sector shrunk by one per cent over this period. Within Greater Brighton, there were employment increases of 25-30 per cent in Brighton and Hove, Mid Sussex and Worthing, although employment fell in Adur from around 150 employees in 2011 to less than ten in 2017.

GlaxoSmithKline is investing £100 million into their Worthing site and this is expected to rise to £200 million over the next three years, which is likely to lead to an increase in employment from the current 900 people on the site.

Cells4Life is a small (c. 30 employees) but growing company in the life sciences sector based in Burgess Hill, involved in stem cell processing, and contributes to the UK's position as one of the leading countries in stem cell research and development. The

company was founded at Kings College in London but moved to Burgess Hill because of space and cost constraints in London, and has a strong international presence.

5.1.2 Medical technology

The med/tech sector in Greater Brighton is smaller than the pharmaceuticals sector, but accounts for a higher relative proportion of employees in comparison with the country as a whole – the 1,700 employees account for 0.44 per cent of total employment, which compares with 0.14 for Great Britain, giving a Location Quotient figure of 3.2. There are around 35 med/tech establishments in Greater Brighton. Within Greater Brighton the sector is concentrated in Crawley, Adur and Worthing, with employment LQs of 8.4, 7.8 and 3.5 respectively.

Table 6 Sector summary for medical technology sector

	Med/tech
Sector definition	2660 : Manufacture of irradiation, electromedical and electrotherapeutic equipment 3250 : Manufacture of medical and dental instruments and supplies
Establishments- Gtr Bton	35
Establishments GB	2,305
Establishment LQ	1.1
Employees - Gtr Bton	1,700
Employees - GB	40,750
Employees - LQ	3.2

Source: ONS BRES data via NOMIS

The two most significant employers are Elekta and Varian on Manor Royal in Crawley, who each employ several hundred workers. Both are world leading companies in the development of advanced cancer treatment systems including linear accelerators, and are significant exporters. Elekta recently rebuilt their UK HQ in a landmark building Manor Royal, on the site of their existing building.

Other employers in the sector include Straumann (dental implants) and Welland Medical (ostomy bags) in Crawley, Eschmann at Lancing Business Park in Adur, who manufacture surgical and decontamination equipment for the medical sector and employ around 200 people, and Rayner Intraocular Lenses in Worthing who design and manufacture lenses and injection devices for use in cataract surgery and also employ around 200 people. Rayner have a national focus but operate in an international market and thus have opportunities for exporting.

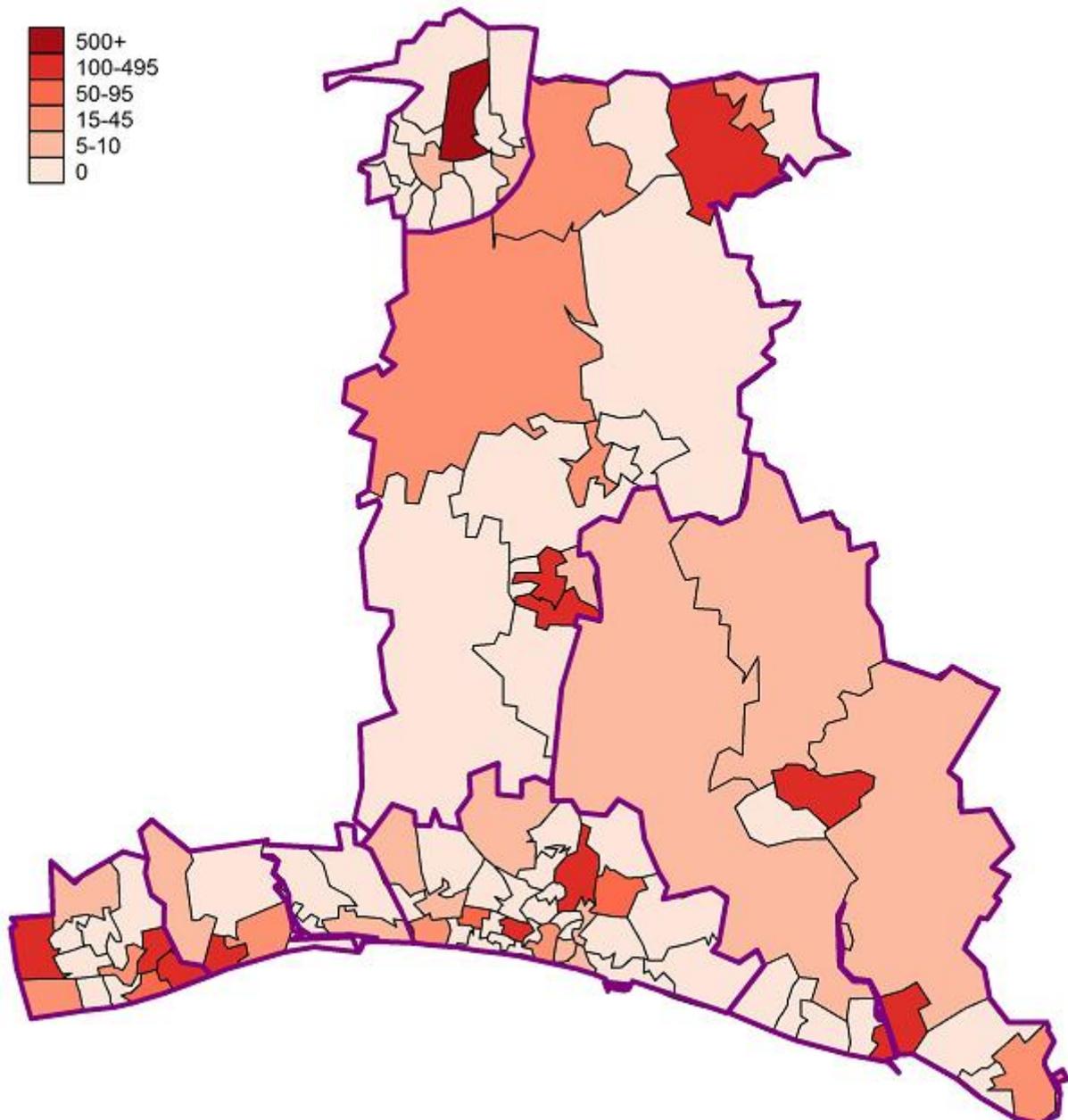
The number of employees in the med/tech sector increased by 17 per cent between 2011 and 2017, from just under 1,500 to around 1,700, while nationally employment decreased by five per cent during this time. Employment in Crawley increased by around 300, a 34 per cent increase, and employment in Worthing increased by around 200, around a five-fold increase on the 2011 figure. However, employment in Brighton fell by around 200.

The Decoy Farm development in Worthing would provide expansion opportunities for Rayner as well as GSK and Allergy Pharmaceuticals.

5.2 Advanced manufacturing

Three key Greater Brighton sectors fall under the advanced manufacturing heading – computer and consumer goods manufacturing, communications and navigation equipment manufacturing, and electrical and electronic manufacturing. The first two sectors are also LEP priority sectors. Figure 5.2 shows the distribution of employment across the Greater Brighton area.

Figure 5.2: Employment in advanced manufacturing sectors by local area, 2017



Source: ONS BRES data via NOMIS

The highest concentration is in Manor Royal in Crawley, while Burgess Hill, Worthing and Adur have relatively strong traditions of advanced manufacturing employment, and there are smaller pockets in east Lewes and Newhaven.

5.2.1 Computer and consumer good manufacturing

There are around 800 workers in the computer and consumer goods manufacturing sector in Greater Brighton, working in around 50 establishments, and in relative terms the sector is nearly twice as large as the national average. Worthing has the highest concentration, with a location quotient of 6.8, while the sector is also over-represented in Adur (LQ of 2.8) and Mid Sussex (LQ of 3.4)

Table 7 Sector summary for computer and consumer goods manufacturing

Computer/consumer goods manufacturing	
Sector definition	2611 : Manufacture of electronic components 2612 : Manufacture of loaded electronic boards 2620 : Manufacture of computers and peripheral equipment 2640 : Manufacture of consumer electronics
Establishments- Gtr Bton	50
Establishments GB	2,325
Establishment LQ	1.6
Employees - Gtr Bton	800
Employees - GB	33,250
Employees - LQ	1.9

Source: ONS BRES data via NOMIS

Bowers and Wilkins in Worthing and Paxton in Brighton are two of the largest employers in this sector. Bowers and Wilkins have been making speakers and headphones in Worthing for over 50 years and employ over 200 people in East Worthing; they are felt to be committed to the area and have potential to grow. Paxton make electronic door entry and building intelligence systems and are based at the Home Farm Business Centre in East Brighton, close to the University of Brighton. They have recently worked with the University of Brighton to develop a scholarship scheme to help overcome skills shortages they were experiencing; in the first year of operation they took three students who worked as interns in the summer and then based their dissertation on a project they undertook with the company, and in the second year the scheme was extended to include the University of Sussex and the firm took on four students.

Employment in the sector in Greater Brighton fell by seven per cent between 2011 and 2017, compared to a national fall of 21 per cent over this period. Employment held up in Brighton and Worthing, with numbers increasing by seven per cent in each district.

5.2.2 Communications and navigation equipment manufacturing

The communications and navigation equipment manufacturing sector is nearly four times as large in Greater Brighton as it is across the country as a whole. The 3,500 employees account for 0.89 per cent of total employment, compared with the national average of 0.24 per cent.

Table 8 Sector summary for communications and navigation equipment manufacturing

Communications and navigation equipment manufacturing	
Sector definition	2630 : Manufacture of communication equipment 2651 : Manufacture of instruments and appliances for measuring, testing and navigation
Establishments- Gtr Bton	55
Establishments GB	3,530
Establishment LQ	1.1
Employees - Gtr Bton	3,500
Employees - GB	69,750
Employees - LQ	3.8

Source: ONS BRES data via NOMIS

Employment is concentrated in Crawley and Worthing, with location quotients of 10.2 and 4.0 respectively. Thales in Crawley is a world leading company in defence aerospace, and employs around 2,000 workers on Manor Royal. Worthing is home to Electronic Temperature Instruments (ETI) and Eurotherm, who employ around 100 and 300 workers respectively. Both are major exporters, and ETI holds three Queen's Awards for Exporting.

Between 2011 and 2017 employment in the sector in Greater Brighton increased by 44 per cent, compared with a national increase of just one per cent. In Worthing, employment nearly trebled, from 160 to 450, and employment in Crawley increased by 52 per cent.

5.2.3 Electrical and electronic manufacturing

Across Greater Brighton around 1,200 employees work in the electric and electronic manufacturing sector, in 35 establishments. The proportion of employment accounted for by the sector is twice the national average (0.30% compared with 0.15% in Great Britain), and there is a very strong over-representation in Lewes district (LQ of 4.9).

Table 9 Sector summary for electric and electronic manufacturing

Electric and electronic manufacturing	
Sector definition	2732 : Manufacture of other electronic and electric wires and cables 2740 : Manufacture of electric lighting equipment 2751 : Manufacture of electric domestic appliances 2790 : Manufacture of other electrical equipment
Establishments- Gtr Bton	35
Establishments GB	1,980
Establishment LQ	1.3
Employees - Gtr Bton	1,200
Employees - GB	45,000
Employees - LQ	2.0

Source: ONS BRES data via NOMIS

Major employers include Time24 in Burgess Hill (wiring and cabling), Hanover Displays in Lewes (digital displays), Feilo Sylvania in Newhaven (lighting), and Fireco in Brighton (fire door systems).

The number of workers in the sector in Greater Brighton has doubled in the last six years, while nationally employment has been flat. Within Greater Brighton here have been large increases in Adur, Crawley and Worthing, but no change in employee numbers in Lewes district.

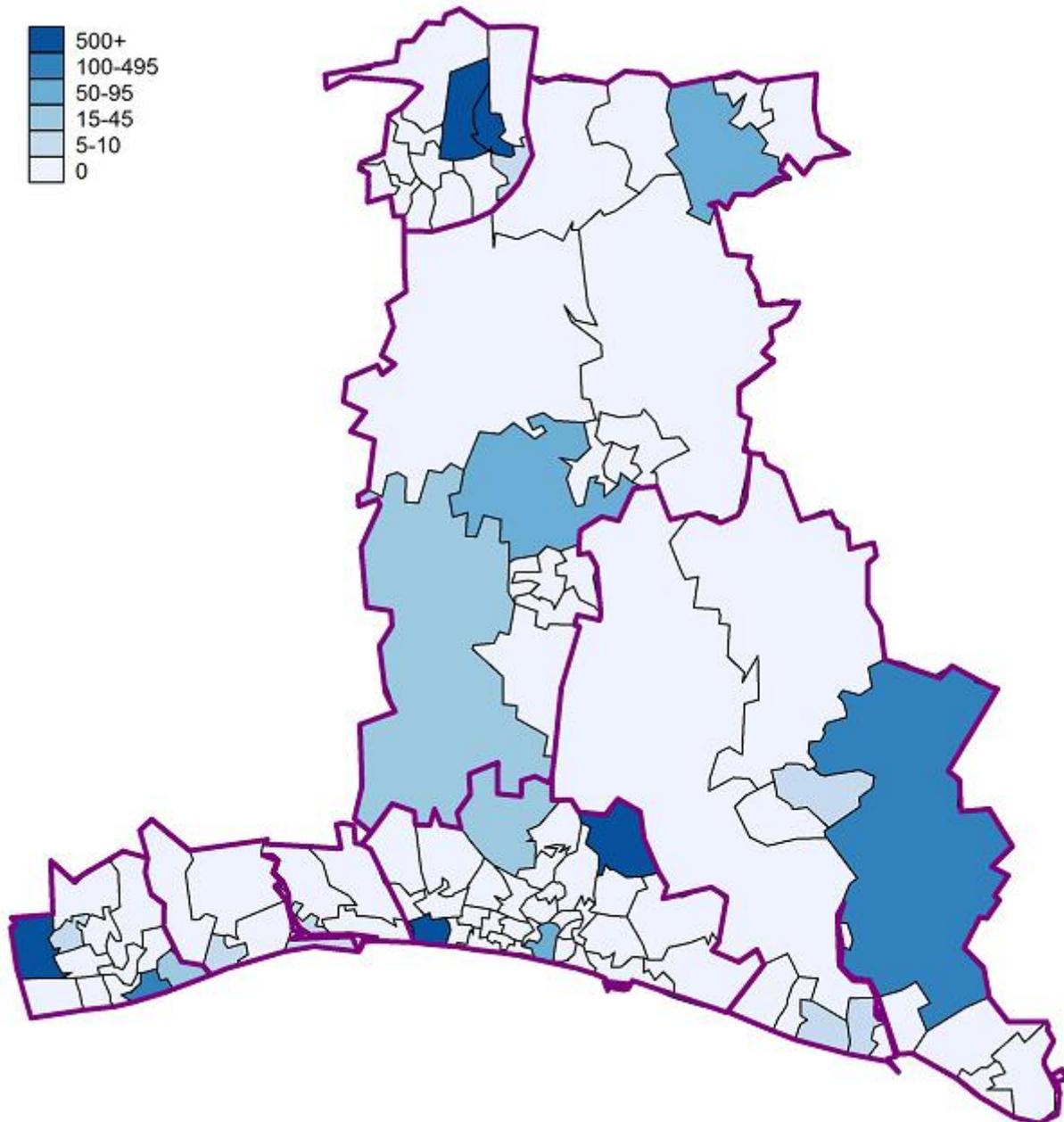
5.2.4 Advanced engineering

Related to the advanced manufacturing sector is Ricardo in Shoreham, who provide advanced engineering solutions to a range of sectors including automotive, rail, defence, motorsport, energy and environment. As a strategic engineering and environmental consultancy they fall under the professional services activities rather than manufacturing (SIC 7112.1 Engineering design activities for industrial process and production) although work closely with manufacturing clients and have a workforce with similar skills to those in advanced manufacturing. Ricardo employ around 600 workers and account for 2.9 per cent of total employment in Adur district, giving a location quotient of nearly 15 (nationally, SIC 7112.1 accounts for 0.2% of total employment).

5.3 Utilities

The broad utilities sector consists of electricity generation and distribution, and the water supply sector. Figure 5.3 shows that employment is concentrated in particular pockets – Manor Royal, Falmer, Hove, and Worthing – with low numbers (or no employment) across much of the City Region.

Figure 5.3: Employment in utilities sectors by local area, 2017



Source: ONS BRES data via NOMIS

5.3.1 Electric power generation and transmission

The electricity generation and distribution sector is twice as large in employment terms in Greater Brighton as it is across the country as a whole. There are 2,700 employees working in 85 establishments who account for 0.70 per cent of total employment, compared with the figure for Great Britain of 0.30 per cent.

Table 10 Sector summary for electric power generation and transmission

Electricity	
Sector definition	3511 : Production of electricity 3512 : Transmission of electricity 3513 : Distribution of electricity 3514 : Trade of electricity
Establishments - Gtr Bton	85
Establishments GB	5,505
Establishment LQ	1.1
Employees - Gtr Bton	2,700
Employees - GB	89,500
Employees - LQ	2.3

Source: ONS BRES data via NOMIS

EDF Energy has large sites in West Hove (c. 1,000 employees) and Three Bridges (c. 300 employees), while UK Power Networks also has a large site in Three Bridges (c. 300 employees) and a smaller one at Ringmer (c. 100 employees). Other significant employers include Doosan Babcock Energy at Manor Royal (c. 400 employees) and Dual Energy in Worthing (c. 150 employees).

There has been a modest increase in employment in Greater Brighton since 2011 of 10 per cent, below the increase nationally of 27 per cent. There were above average increases in employment in Crawley, Lewes and Mid Sussex, albeit from small 2011 levels in the case of Lewes and Mid Sussex. However, there was a large fall in employment in Worthing, from 600 in 2011 to 150 in 2017.

Too recent to have fed into the employment figures is the development of the Rampion Operations and Maintenance base at Newhaven Port, which will be the base for the team who will operate the wind farm when it is complete, and is helping with the regeneration of Newhaven Port as part of the Newhaven Enterprise Zone.

5.3.2 Water

The water sector in Greater Brighton accounts is more than three times larger in relative employment terms and it is across the country, with the 1,600 employees accounting for 0.41 per cent of total employees compared with 0.13 per cent nationally. Nearly 90 per cent of these employees work at the two large Southern Water sites in Worthing (c. 900 employees) and Falmer (c. 500). (It should be noted that BRES data for 2011 did not record the water sector employment at either Falmer or Worthing, and so trend data are not available.)

Table 11 Sector summary for water sector

Water	
Sector definition	3600 : Water collection, treatment and supply
Establishments - Gtr Bton	15
Establishments GB	895
Establishment LQ	1.2
Employees - Gtr Bton	1,600
Employees - GB	37,000
Employees - LQ	3.3

Source: ONS BRES data via NOMIS

5.4 Air transport

The air transport sector is focused around Gatwick Airport and includes repair of aircraft, cargo handling and supporting activities to air transport as well as air transport itself. Figure 5.4 shows the concentration of employment around Gatwick, with some supporting activity employment located in Mid Sussex and Lewes, and also Shoreham Airport.

According to the ONS data, there are around 16,000 employees in the air transport sector in Greater Brighton, who account for nearly eight times as high a proportion of total employment as the national proportion (4.1%, compared with 0.5% nationally).

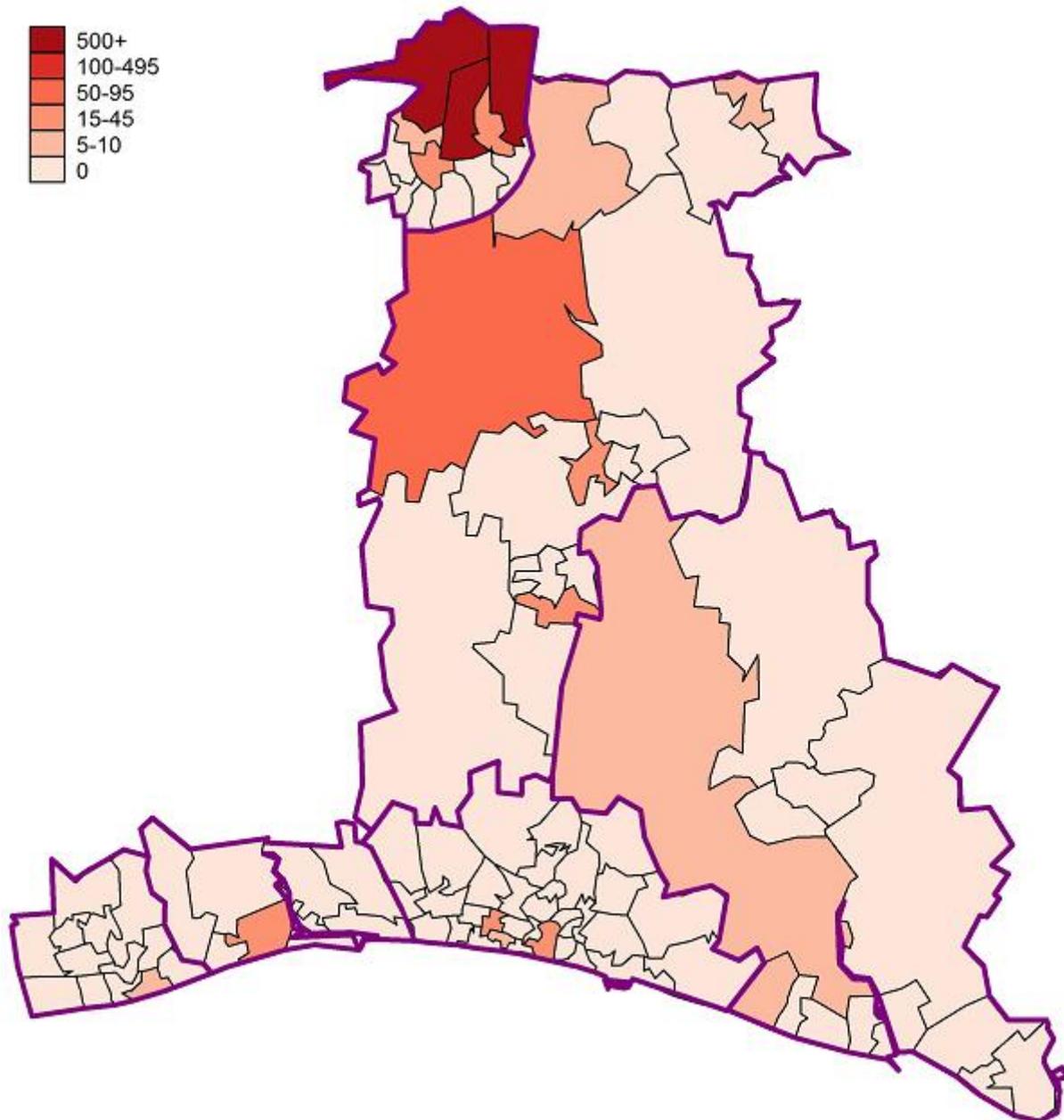
Table 12 Sector summary for air transport sector

Air transport	
Sector definition	3316 : Repair and maintenance of aircraft and spacecraft 5110 : Passenger air transport 5223 : Service activities incidental to air transportation 5224 : Cargo handling
Establishments - Gtr Bton	150
Establishments GB	4,270
Establishment LQ	2.6
Employees - Gtr Bton	16,100
Employees - GB	154,000
Employees - LQ	7.8

Source: ONS BRES data via NOMIS

The airport directly employs around 2,500 workers, but the indirect employment impact is thought to be around 23,000 in total, reflecting not only the supporting activities which are captured in the ONS data, but also the supply chain. Some of the large businesses that support the airport include Alpha and LSG Sky Chefs.

Figure 5.4: Employment in the air transport sector by local area, 2017



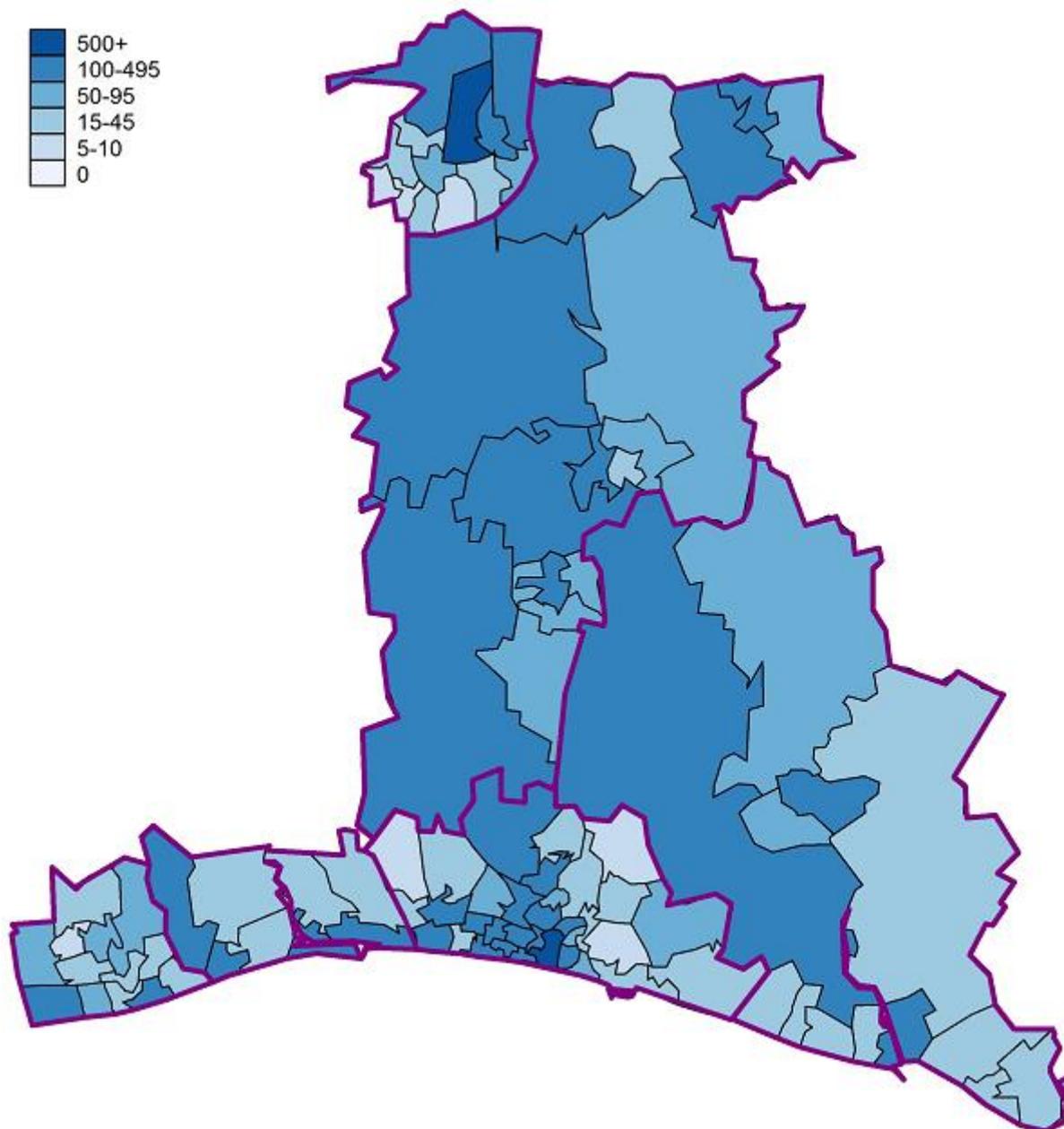
Source: ONS BRES data via NOMIS

Employment in air transport in Greater Brighton decreased slightly between 2011 and 2017, by 2.6 per cent, while nationally employment increased by 14 per cent.

5.5 Information and communication technologies

Three key sectors fall under the broad heading of information and communication technologies – telecommunications, computer software programming and publishing, and data processing and hosting. Figure 5.5 shows that ICT employment is distributed across the Greater Brighton area, although the largest concentrations are in central Brighton and Manor Royal.

Figure 5.5: Employment in information and communication technology sectors by local area, 2017



Source: ONS BRES data via NOMIS

5.5.1 Telecommunications

The other telecommunications sector is only slightly larger in Greater Brighton than it is nationally, with an employment location quotient of 1.2 and an establishment location quotient of 1.1. The 2,500 employees account for 0.63 per cent of total employment, compared with 0.52 per cent nationally, and there are 120 establishments in the sector across Greater Brighton.

Table 13 Sector summary for other telecommunications activities

Telecommunications	
Sector definition	6190 : Other telecommunications activities
Establishments- Gtr Bton	120
Establishments GB	7,930
Establishment LQ	1.1
Employees - Gtr Bton	2,500
Employees - GB	153,500
Employees - LQ	1.2

Source: ONS BRES data via NOMIS

The sector is particularly concentrated in Adur, with an employment location quotient of 5.1, and Brighton (LQ of 1.6). In Adur, Focus Group in Southwick are the largest employer in the sector with over 300 employees, and SCS Telecoms at Lancing Business Park employ around 100 workers. In Brighton, BT has a large presence at Withdean Grange and Cavendish Communications in Newhaven and Spirent in Crawley are also significant employers.

Between 2011 and 2017 employment in the sector in Greater Brighton increased by 49 per cent, which compares with a fall in employment across the country as a whole of 12 per cent. Employment in Adur increased ten-fold, from 50 to 500, and there were also large increases in Brighton and Hove, and in Lewes.

5.5.2 Computer software programming and publishing

The computer software programming and publishing sector in Greater Brighton is large in terms of employment numbers, with nearly 10,000 employees, although as a proportion of total employment it accounts for the same as the national average, 2.5 per cent.

Brighton and Hove accounts for just over half of all employment in the sector in Greater Brighton, and the employment location quotient is 1.5. Mid Sussex is the only other district with an over-representation of employment (LQ of 1.04). Brandwatch is one of the key players in the sector, located in central Brighton, and the games development sector is well represented in Brighton by companies such as BossAlien and Brightrock Games. Lighthouse Systems at Pease Pottage is also a large employer with around 150 employees.

Employment in the sector in Greater Brighton has increased in recently years, although not as fast as across the country as a whole. Between 2011 and 2017 there was an increase of 19 per cent in Greater Brighton which was around half the national increase of 39 per cent over this time. The increases in Brighton and Hove and Lewes were close to the national level, while employment in the sector in Worthing fell by 31 per cent.

Table 14 Sector summary for computer software programming and publishing

Computer software programming and publishing	
Sector definition	5821 : Publishing of computer games 5829 : Other software publishing 6201 : Computer programming activities 6202 : Computer consultancy activities 6203 : Computer facilities management activities 6209 : Other information technology and computer service activities
Establishments- Gtr Bton	2,940
Establishments GB	166,510
Establishment LQ	1.3
Employees - Gtr Bton	9,700
Employees - GB	747,875
Employees - LQ	1.0

Source: ONS BRES data via NOMIS

5.5.3 Data processing/hosting

The data processing and hosting sector is concentrated in Crawley, where the sector is three times larger than average, although across Greater Brighton as a whole there is only a small over-representation compared with the national picture. Rackspace and 4D have large data centres at Manor Royal.

Table 15 Sector summary for data processing and hosting

Data processing and hosting	
Sector definition	6311 : Data processing, hosting and related activities 6312 : Web portals
Establishments- Gtr Bton	90
Establishments GB	4,875
Establishment LQ	1.4
Employees - Gtr Bton	800
Employees - GB	52,000
Employees - LQ	1.1

Source: ONS BRES data via NOMIS

As with the software sector, there was a below average increase in employment in the data processing and hosting sector in Greater Brighton between 2011 and 2017; employment increased by 22 per cent compared with the national increase of 35 per cent. Employment in Crawley, where most employment is concentrated, increased by 11 per

cent, while employment in Brighton and Hove increased by 38 per cent, from just over 100 to just under 150.

An issue was raised that growth in activity in this sector may not necessarily be reflected in increases in employment, as the sector has a large land/office space requirement for the hardware but does not employ many people in relation to the land/building space ie has a low employment density in comparison with other sectors.

5.5.4 Digital infrastructure

There were a number of comments made by interviewees about using digital infrastructure improvements as a measure to attract and grow digital businesses. In coastal West Sussex there are plans by West Sussex County Council to improve connectivity – “gigabit the coast” – which will support Worthing’s aims to develop digital sectors as a strategic growth area, Mid Sussex has received funding from the Local Full Fibre Network (LFFN) fund for ultrafast broadband in Burgess Hill, and Brighton and Hove and East Sussex are considering LFFN bids. Crawley has also identified digital sectors as a strategic growth area, and fill in the gap between Croydon and Brighton which are both strong in terms of digital businesses and employment; upgrading connectivity in Manor Royal from ‘superfast’ (100Mbps) to ‘ultrafast’ (Gigabit) will support that ambition.

5.6 Insurance and financial services

The insurance and financial services sector encompasses all those elements in insurance and finance except high street banking.

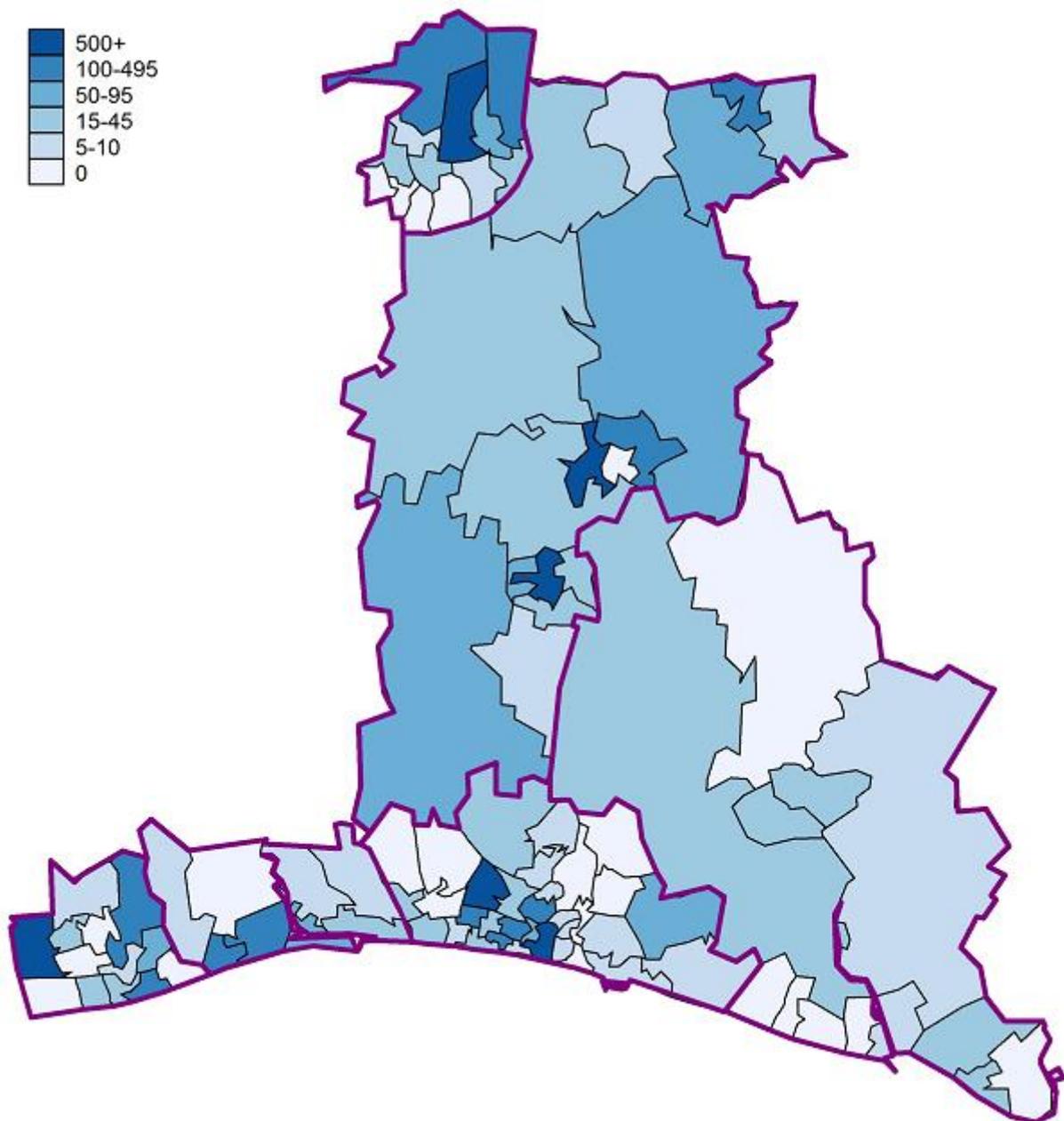
The insurance and financial services sector in Greater Brighton employs around 14,000 workers and is nearly twice as large in relative terms as the national average, accounting for 3.6 per cent of total employment compared with 2.0 per cent nationally. Within Greater Brighton, the sector is most concentrated in Brighton and Hove (LQ of 2.8) and Mid Sussex (LQ of 2.1). Figure 5.6 shows pockets of employment in central Brighton, Hove, Worthing, Burgess Hill, Haywards Heath, and Manor Royal.

Brighton and Hove is home to American Express and Legal and General, who each have more than 1,500 employees at their sites in central Brighton and Hove Park respectively. There is a cluster of large insurance firms by Brighton Station, with Aviva, Black Lion Insurance, MetLife and BUPA Global being located in the New England Quarter.

In Mid Sussex, American Express has a large site in Burgess Hill, and Zenith Insurance and 1st Central Car Insurance in Haywards Heath each have several hundred employees.

Outside of these two districts, Crawley is home to B&CE at Manor Royal who have over 400 employees, and EQ Shareview in Worthing is also a major employer.

Figure 5.6: Employment in insurance and financial services by local area, 2017



Source: ONS BRES data via NOMIS

Table 16 Sector summary for insurance and financial services

Insurance and financial services	
Sector definition	6491 : Financial leasing 6492 : Other credit granting 6499 : Other financial service activities, except insurance and pension funding, n.e.c. 6511 : Life insurance 6512 : Non-life insurance 6520 : Reinsurance 6530 : Pension funding 6611 : Administration of financial markets 6612 : Security and commodity contracts brokerage 6619 : Other activities auxiliary to financial services, except insurance and pension funding 6621 : Risk and damage evaluation 6622 : Activities of insurance agents and brokers 6629 : Other activities auxiliary to insurance and pension funding
Establishments - Gtr Bton	645
Establishments GB	51,495
Establishment LQ	0.9
Employees - Gtr Bton	14,000
Employees - GB	584,000
Employees - LQ	1.8

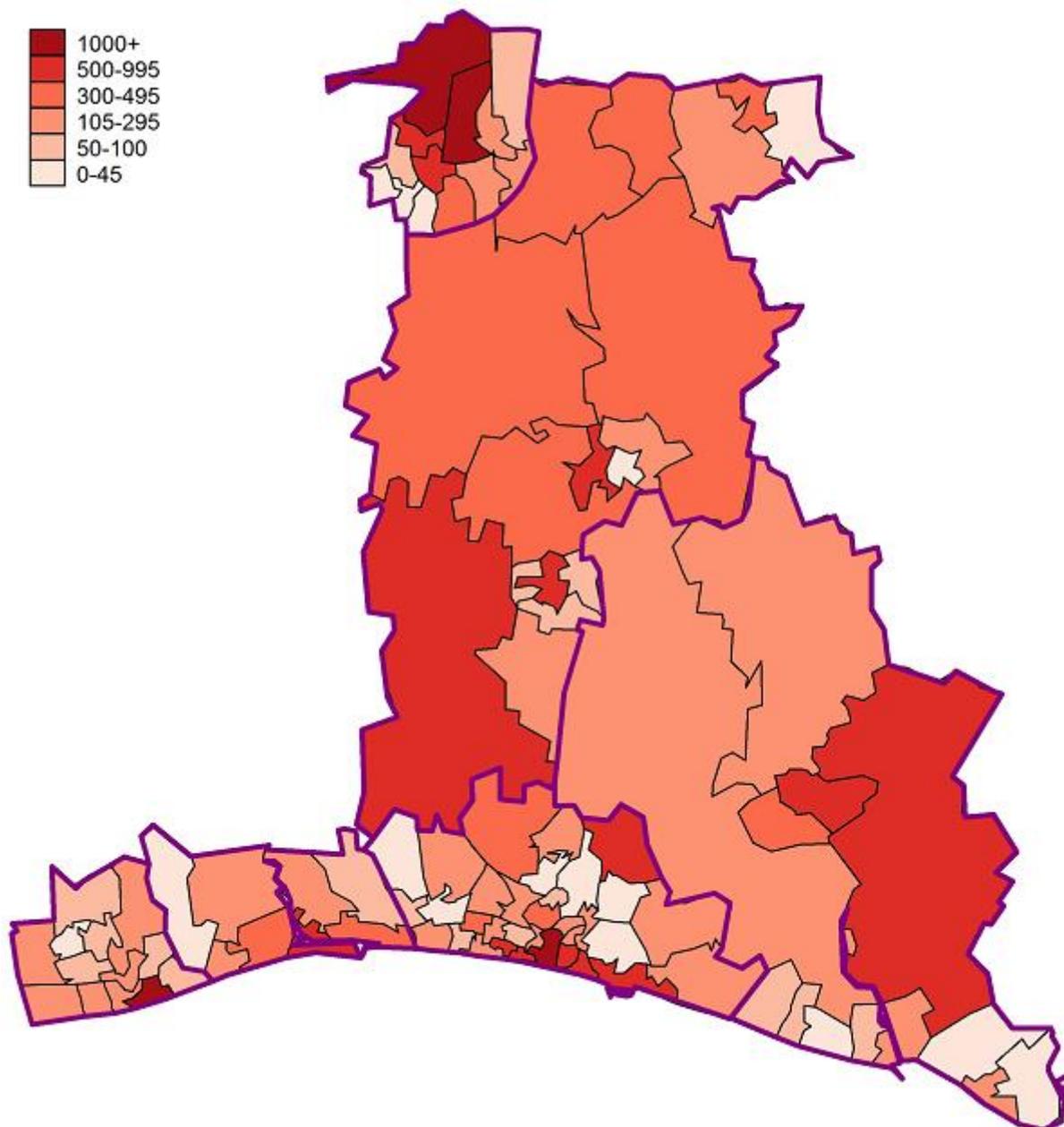
Source: ONS BRES data via NOMIS

Employment in insurance and financial services has grown much faster in Greater Brighton than in the country as a whole. Between 2011 and 2017 there was an increase of 24 per cent in Greater Brighton, which was nearly five times as large as the national increase of five per cent. The employment level in Brighton and Hove increased by nearly 2,000 workers, or 36 per cent, while there were larger relative increases in Crawley (50%) and Adur (127%). However, in the other three districts there were decreases in employment, ranging from a two per cent fall in Mid Sussex, to a 21 per cent fall in Lewes.

5.7 Travel and visitor economy

This broad sector covers travel agency and tour operator activities, and sectors associated with visitors to the area such as accommodation, food and drink, and visitor attractions. Figure 5.7 shows that employment is distributed fairly evenly across the Greater Brighton districts, apart from some outer suburban areas, but with concentrations in central Brighton and Worthing, and around Gatwick airport (including large travel/tourism companies at Manor Royal).

Figure 5.7: Employment in travel and visitor economy sectors by local area, 2017



Source: ONS BRES data via NOMIS

5.7.1 Travel and tourism

There are nearly three times as many employees working in the travel and tourism sector in Greater Brighton as there are in the country as a whole. Around 3,800 employees work in this sector in Greater Brighton, who account for just under one per cent of total employment, compared with 0.33 per cent nationally.

Table 17 Sector summary for travel and tourism

Travel and tourism	
Sector definition	7911 : Travel agency activities 7912 : Tour operator activities 7990 : Other reservation service and related activities
Establishments - Gtr Bton	205
Establishments GB	10,990
Establishment LQ	1.4
Employees - Gtr Bton	3,800
Employees - GB	97,400
Employees - LQ	2.9

Source: ONS BRES data via NOMIS

The sector is heavily concentrated in Crawley, which accounts for nearly half of all employment across the Greater Brighton area, and has an employment location quotient of 5.8. Virgin Holidays is the largest employer in sector, with the company headquarters at Manor Royal in newly built office complex. Brighton and Hove also has an over-representation (LQ of 3.1), with employment concentrated in the city centre and at the marina.

Employment in the sector in Greater Brighton fell between 2011 and 2017, by 19 per cent, compared with an increase nationally of five per cent.

5.7.2 Visitor economy

The visitor economy sector is the largest and most generic of the key sectors in Greater Brighton. There are nearly 35,000 employees, although the proportion of total employment is only slightly above the national average (8.9% compared with 7.9%), giving an employment location quotient of 1.1, while there is a slightly greater over-representation when looking at establishments (LQ of 1.2).

Brighton and Hove has the highest proportion of employment in the visitor economy (11%, LQ of 1.4), followed by Lewes (9.2%, LQ of 1.2) while Worthing has the lowest proportion (5.7%, LQ of 0.7).

Employment growth in the visitor economy has been lower in Greater Brighton than in the country as a whole, with an increase in employment locally between 2011 and 2017 of seven per cent, while nationally employment increased by 22 per cent over this time. Adur and Lewes experienced the largest increases in employment, of 66 per cent and 26 per cent respectively, while employment in the visitor economy in Brighton and Hove fell during this period, by six per cent. In terms of future developments, Crawley is looking to develop the evening economy around the historic High Street, via the Historic High Street Forum of businesses.

Table 18 Sector summary for visitor economy

Visitor economy	
Sector definition	5510 : Hotels and similar accommodation 5610 : Restaurants and mobile food service activities 5621 : Event catering activities 5629 : Other food service activities 5630 : Beverage serving activities 9001 : Performing arts 9002 : Support activities to performing arts 9003 : Artistic creation 9004 : Operation of arts facilities 9102 : Museum activities 9103 : Operation of historical sites and buildings and similar visitor attractions 9104 : Botanical and zoological gardens and nature reserve activities 9321 : Activities of amusement parks and theme parks 9329 : Other amusement and recreation activities
Establishments - Gtr Bton	3,590
Establishments GB	224,830
Establishment LQ	1.2
Employees - Gtr Bton	34,900
Employees - GB	2,330,500
Employees - LQ	1.1

Source: ONS BRES data via NOMIS

5.8 Higher education

The two universities in Brighton together employ around 6,000 staff, and account for 4.4 per cent of employment in Brighton and Hove, and 1.5 per cent of all employment across Greater Brighton. This latter proportion is the same as the national proportion, giving a Greater Brighton location quotient of 1.0, although the LQ in Brighton and Hove is 2.9. Employment in local HE has grown slightly faster than the national rate, with employee numbers increasing by 20 per cent in Brighton and Hove between 2011 and 2017 compared with 15 per cent nationally.

In addition to their presence as large businesses in their own right, the work of the universities supports local businesses across a wide range of sectors, through:

- Opportunities for students to undertake work placements which are often based around a particular project.
- Knowledge Transfer Partnerships which are longer programmes (1-3 years) for graduates but again based around a strategic project for the business.

- Strong links between academics and business through industry advisory boards, which helps to ensure that curriculum is relevant for business needs.
- Sharing resources – for example Ricardo has test facilities at the University of Brighton and run experiments there with engineering students.
- Supporting commercial opportunities from research, eg Sussex Innovation Centre.
- Supply of labour to universities – many academic staff come from major businesses such as Ricardo and GlaxoSmithKline.

5.9 Other miscellaneous sectors

The analysis of the ONS employment data identified two additional sectors that are over-represented in Greater Brighton but do not have the characteristics of key priority sectors for development. In addition, the retail sector is a major employer, with particular specialisms in certain areas.

The regulatory activities of the public sector are over-represented, accounting for more than twice the national proportion of employment (c. 3,000 employees who account for 0.79% of Greater Brighton employment, compared with 0.33 per cent nationally). The Pensions Regulator in central Brighton is one of the largest organisations in this sector (and Brighton and Hove has a LQ of 5).

The combined facilities support activities sector provides facilities management services to businesses across a range of sectors. OCS Group UK are head-quartered at Tilgate Business Park in Crawley and co-ordinate the 8,000 strong national workforce (in the BRES data, all employees are registered at this site), of which a substantial proportion are likely to serve Gatwick Airport and Manor Royal.

The retail sector employs around 40,000 workers across Greater Brighton, accounting for 10.3 per cent of all employment, slightly above the national figure of 9.5 per cent. Adur has the largest retail sector, accounting for 12.6 per cent of employment, and Crawley the smallest (8.8%). Retail sale of cultural and recreational goods, and retail sale via mail order, are over-represented compared to the national picture, and are particularly strong in Crawley, and in Lewes and Worthing respectively. Retail employment has grown nearly twice as fast in Greater Brighton as in the country as a whole since 2011 (7.2%, compared with 3.7% for Great Britain), with Crawley experiencing the fastest growth (15.4%) followed by Mid Sussex (11.7%) and Lewes (11.0%), while in Adur employment in retail fell by 3.9 per cent between 2011 and 2017.

Appendix

List of stakeholder organisations

- Adur & Worthing Business Partnership
- Adur & Worthing Councils
- Brighton and Hove City Council
- Brighton & Hove Economic Partnership
- Coast-to-Capital Local Enterprise Partnership
- Coastal West Sussex Partnership
- Crawley Borough Council
- DiT Investment Services
- DiT Trade & Export
- Gatwick Diamond
- Greater Brighton Metropolitan College
- Lewes District Council
- Manor Royal Business Improvement District
- Mid Sussex District Council
- South Downs National Park Authority
- Southern Water
- Sussex Chamber of Commerce
- University of Brighton
- University of Sussex
- West Sussex County Council

Data tables

Table 19 Establishments by industrial sector, Greater Brighton, 2018

	Establishments	Per cent	GB %
Agriculture, forestry and fishing	535	1.3	4.4
Mining and quarrying	10	0.0	0.1
Manufacturing	1,605	3.9	4.7
Electricity, gas	95	0.2	0.2
Water supply etc	125	0.3	0.4
Construction	4,540	11.0	10.9
Wholesale and retail trade	6,870	16.6	16.2
Transportation and storage	1,045	2.5	4.1
Accommodation and food	2,735	6.6	6.4
Information and communication	4,170	10.1	7.4
Financial and insurance activities	910	2.2	2.4
Real estate activities	1,400	3.4	3.5
Professional, scientific and technical activities	6,965	16.9	15.8
Administrative and support service activities	3,705	9.0	8.6
Public administration and defence	245	0.6	0.8
Education	1,020	2.5	2.3
Human health and social work activities	2,275	5.5	5.4
Arts, entertainment and recreation	1,430	3.5	2.7
Other service activities	1,635	4.0	3.8
Total	41,310	-	-

Source: ONS Business Count via NOMIS

Table 20 Establishments by sector and Greater Brighton district, 2018 (%)

	Adur	BH	Crawley	Lewes	Mid Sussex	Worthing	G Bton	GB
Agriculture, forestry and fishing	0.9	0.3	0.2	3.8	2.9	0.2	1.3	4.4
Mining and quarrying	0.2	0.0	0.0	0.0	0.1	0.0	0.0	0.1
Manufacturing	6.7	2.7	4.0	5.4	4.2	4.2	3.9	4.7
Electricity, gas	0.2	0.1	1.1	0.1	0.2	0.1	0.2	0.2
Water supply etc	0.7	0.2	0.3	0.5	0.3	0.3	0.3	0.4
Construction	17.5	8.6	10.3	12.2	12.4	12.4	11.0	10.9
Wholesale and retail trade	17.3	17.9	18.0	15.1	14.0	17.0	16.6	16.2
Transportation and storage	3.7	1.2	7.9	2.7	2.1	2.0	2.5	4.1
Accommodation and food	5.8	7.8	7.1	5.6	4.6	7.2	6.6	6.4
Information and communication	7.2	12.4	8.2	7.8	9.7	8.4	10.1	7.4
Financial and insurance activities	2.2	1.7	2.7	1.7	3.0	2.4	2.2	2.4
Real estate activities	2.2	3.8	2.3	3.5	3.5	3.6	3.4	3.5
Professional, scientific and technical activities	12.8	17.6	12.9	17.6	19.3	15.1	16.9	15.8
Administrative and support service activities	8.0	8.7	11.6	7.6	9.3	8.7	9.0	8.6
Public administration and defence	0.6	0.5	0.8	0.8	0.4	0.7	0.6	0.8
Education	2.6	2.5	2.4	2.7	2.5	2.2	2.5	2.3
Human health and social work activities	5.0	5.5	4.8	5.3	4.9	8.1	5.5	5.4
Arts, entertainment and recreation	2.4	4.7	1.8	4.1	2.5	2.5	3.5	2.7
Other service activities	4.5	3.7	3.9	3.7	3.9	4.8	4.0	3.8
All establishments	2,690	16,200	4,620	5,035	8,250	4,525	41,310	-

Source: ONS Business Count via NOMIS

Table 21 Birth rates of new enterprises and death rates of enterprises 2012-17 (%)

		2012	2013	2014	2015	2016	2017
Gtr Bton	Births	11.2	13.5	13.3	13.4	13.0	12.1
	Deaths	10.8	9.9	9.4	10.4	10.0	11.0
Adur	Births	9.7	12.8	11.3	12.7	12.0	11.1
	Deaths	9.2	8.5	9.4	8.4	9.8	9.6
B&H	Births	12.5	14.6	14.6	14.3	13.8	13.3
	Deaths	10.7	10.6	9.8	11.2	10.9	11.6
Crawley	Births	12.9	15.9	13.8	16.6	16.5	13.2
	Deaths	11.8	10.6	11.1	11.1	11.2	12.3
Lewes	Births	9.1	12.4	11.4	11.1	10.7	9.8
	Deaths	10.7	8.6	7.8	9.5	8.6	9.5
Mid Sussex	Births	9.9	11.7	12.4	12.2	12.1	11.3
	Deaths	10.4	9.1	8.6	9.4	8.7	10.6
Worthing	Births	11.0	12.7	13.1	12.5	11.2	11.5
	Deaths	12.0	10.7	9.5	11.0	9.8	11.1
UK	Births	11.3	14.1	13.7	14.3	14.6	13.1
	Deaths	10.6	9.7	9.7	10.6	10.2	12.2

Source: ONS Business demography, UK

