



Coastal West Sussex: setting the scene...

Coastal West Sussex Partnership -
working together to grow our coastal economy

Coastal West Sussex: setting the scene...

Assessing the challenges, potential and identity of a region ready for development

Introduction

This white paper has been created for the Coastal West Sussex Partnership to bring into focus the challenges and opportunities facing the economy of Coastal West Sussex. The paper celebrates the individual identities and specific needs of our coastal towns whilst also identifying some of the opportunities and challenges that bring us together.

It aims to give the CWS Partnership and our partners a clear purpose, helping us to focus our interventions so that the region's coastal economy can prosper. This is particularly relevant as the region recovers from the fallout of the Covid-19 pandemic and the effect that it has had on businesses across the coast.

Chapter One: Potential and need side by side on the West Sussex coastline

By Henry Powell, Chairman, Coastal West Sussex Partnership

Everyone is looking for the region with that economic growth potential to be the next big thing; the next borough in London to be gentrified, the next forgotten gem to shine, the next area of untapped potential to flourish with new investment.

Here in Coastal West Sussex, in an area sandwiched by the creative, tech and cultural hubs of Brighton

and Chichester, and with direct links to London, the opportunity for our seaside area to reinvent ourselves and to be that next success story is palpable.

The combination of quality of life by the sea, cheaper housing than many areas across the south east, more affordable commercial space, growing businesses and a united will to encourage investment should be a powerful force for good.

Attracting investment, both from central government and from the private sector, is a competitive business. However, it can only be achieved with clear goals, clear strategies, clear communication and an honest assessment of the needs and challenges of a region, not just its potential.

In this white paper we will focus on what makes Coastal West Sussex special but also provide an honest appraisal of the hurdles ahead – and, just as importantly, ask what is the golden thread that gives our coastal homeland a unique identity as a region that's absolutely ready for sustainable development and growth?

The paper aims to strengthen our shared purpose, explaining why working together is key to the region's future and gives a clearer picture of where we should focus our efforts for maximum benefit.

Building that identity is crucial as we continue the positive transition that is already taking shape in the economy of Coastal West Sussex, supported by a shared will to succeed along with private and public sector investment.

The more we can work together, and identify what connects us, the easier it will be in future to grow our existing businesses, attract new businesses and bid for increased funding for ambitious cultural, industrial, commercial and infrastructure projects.

Highlighting the challenges

There are a number of significant and deep-lying challenges when it comes to achieving the economic

goals we all strive for in Coastal West Sussex, from transport infrastructure to education and geography to central government misinterpretation.

However, the key here is not to see those challenges as negatives but rather as an opportunity, making a strong case for investment so that the areas untapped economic potential can be realised.

Misplaced assumptions from central government

One of the biggest complications is that we are often labelled with the 'prosperous South East' badge by those outside of the region. There's a sense that it's not going to be popular to invest money in Coastal West Sussex when seen as being part of the prosperous south east and when you have such a strong and coherent lobby from other regions, such as the Northern Powerhouse, with its own obvious needs.

Cities such as Manchester have lobbied very well over 10 to 15 years for government investment. Even Brighton isn't going to match up favourably in that comparison because, centrally, we are still seen as one geographically wealthy area.

The reality, however, is that in Coastal West Sussex we are cut off both from the greater south east area because of poor road and rail infrastructure coming into the region from the north, and then slow and often unpredictable road and rail journeys going west and east from Portsmouth, Southampton and Brighton.

This prevents Coastal West Sussex benefitting from the economic growth which should naturally spread from those cities and makes it more difficult to commute in and out of the region, impacting on investment.

Like many seaside areas in the UK, we are hampered by our seaside tourism history and under investment in skills, property and infrastructure as well as being located 'at the end of the line'. We are also hemmed in, in our case between the South Downs (National Park) and the sea. These are not realities to shy away from. They are part of our story, part of what connects us, and part of a strong argument for investment to tease out the untapped potential of a region that has so much to offer.

Education challenges

Schools in the region are improving but we still have some of the most educationally deprived wards on the coast between Littlehampton and Bognor Regis where our children achieve below average standards.

There's evidence that a lack of aspiration both from pupils and parents needs to be addressed and we need to raise educational standards to provide the workers of the future for the tech and digital jobs we hope to create.

Commercial and industrial development

The lack of available sites, and the weight of residential demand, has meant we are not building the high quality new industrial and office environments that the region needs. However, demand from developers to construct speculative industrial schemes is strong.

To take advantage of this, more sites need to come forward and be ring-fenced for industrial use. Current evidence suggests that where speculative schemes are constructed, the take up is high; and the additional advantage is that new development frees up second-hand stock for companies unable to afford the rent or purchase price of new-build offices. It's a win-win situation for the local economy.

The things to shout about

It's important to stress that just because the Coastal West Sussex region has challenges, doesn't mean it doesn't have an array of positives which out-weigh the negatives for the people who live here.

It's a fantastic place to live if you want to achieve a work life balance. We have the South Downs National Park, the sea, an hour's more sunshine a day than most of the country and lower costs for housing and commercial space. It can be a fantastically rewarding place to live with a family, young or old.

The region is very well equipped for leisure and sits on a coastal strip that includes the cultural and business hubs of Brighton, Worthing and Chichester.

¹ The Coastal West Sussex Economic Partnership is a business led partnership; championing economic growth and influencing political strategy and investment decisions through collaboration between the public and private sector.

Coastal West Sussex By Numbers



Population
454,480,000



Economy **£9bn**



Investment into
Higher Education
£35m



Average house
price **£327,568**



46% of the
County's jobs are
in CWS



Annual visitors
12.58m



Number of
businesses **18,700**



A Growing
knowledge economy



Commuter pool
within an hour's
drive **3.5 million**



Median annual
wage **£21,488**

It's an area that really should be benefitting from the Brighton buzz and the creative energy that comes from it – so the potential is huge.

Digital and tech is vital to the regeneration of any region; we've full fibre gigabit connectivity being installed; new digital and creatives hubs being created so those industries are embraced here – and we already have many thriving and big-name businesses in our midst.

It's not only tech and engineering which flourish, either. Our region's rich natural capital provides the perfect environment for some of the UK's leading horticultural growers.

Local businesses have a combined annual turnover in excess of £1billion and employ more than 10,000 full-time equivalent employees.

Successful horticultural businesses in Coastal West Sussex cultivate flowering and ornamental plants for the house and garden. They grow and pack herbs, salads, peppers, chillies, tomatoes and the full range of soft fruit for all the leading retailers, restaurant chains and supermarkets. Our region also produces top quality wine.

The horticulture sector continues to invest in new technology and practices to ensure highly productive, efficient and environmentally sustainable production. As leading producers of food and flowers, our region is proud to be a net contributor to the physical health and mental wellbeing of the nation.

All these aspects are attractive hooks for business investment, and we feel our people can grow and thrive with improved adult education and training. We have a workforce which is ready to be up-skilled.

It is clear Coastal West Sussex is worth investing in – and so the challenge is to build and spread that message by working together.

Why growing a digital culture could be the key to future growth in Coastal West Sussex



Professor Catherine Harper

Deputy Vice-Chancellor, University of Chichester

People often talk about how a major cultural project can transform a region, in the way that the Turner Contemporary gallery has done for Margate.

But the challenge for us here in Coastal West Sussex is to think outside the box and look at digital culture to inspire change.

At the University of Chichester's Tech Park in Bognor Regis there is already a compelling creative and digital offer providing study in computer games, film, video, animation and now e-sports, which is already a multi-billion-dollar industry.

In fact, Bognor Regis is only the second place in the UK where you can study e-sports and that makes it incredibly attractive to young people who are interested in the topic and might not have thought about going to university before.

We need to take advantage of that. Presently, a lot of people leave the area when they look for work and we need to do more to hold onto them. You hope the students arriving now will go on to develop creative businesses in the region and they will want to stay to build those businesses.

The Turner Contemporary gallery has done a lot for Margate but I'm not convinced that kind of project would work here.

Margate is easily accessible from the London art scene and Bognor doesn't have that. It would be a big ask to establish something like that here. We need to be more subversive around culture to make people take notice.

The kind of people who study e-sports are often introverted but also highly imaginative and talented. Having a cultural offer for them in a place where they feel safe and with a business community around them could really benefit Coastal West Sussex. It could become an attractor for the digital tribe to live and work here.

To make it happen with need our internet connection right throughout Coastal West Sussex to be hot, so that should be top of the list to resolve in the short term.

We also need to attend to cultural difference. If we're looking at meetings which only involve white middle-aged people, then we're not achieving that goal – and that needs to be addressed.

Chapter Two: From Shoreham to Chichester – five towns, one vision

Developing a shared narrative for Coastal West Sussex

One of the biggest strengths of the Coastal West Sussex region are the five towns which line up along the coast from Shoreham-by-Sea in the east to Chichester in the west, offering their own unique opportunities for investment and improvement.

With Worthing, Littlehampton and Bognor Regis added to the mix, there is an opportunity to create a compelling vision of a coastal region united in its desire to reinvigorate and modernise its tourism offer, support landmark cultural projects, and attract vibrant new businesses to transform its economy.

Here we talk to people from across the region to find out what each town needs, what they have to offer and what links them all as part of a united Coastal West Sussex identity...



Bev Lees

Operations Director, Allergy Therapeutics, Worthing Board member representative, Coastal West Sussex Partnership

From a business perspective, what are the biggest advantages in doing business in the Worthing region? What makes it special?

“The biggest advantage is our proximity to Gatwick and to Dover; as we export most of our products to the EU by air or road.

“Additionally, we can collaborate with Universities such as Brighton, Sussex, Chichester and Southampton on science projects; and there is also opportunity to recruit from these universities and local colleges.

“Many of our workforce are local people who have strong family links to the Worthing area; which aids staff retention.”

What are the biggest challenges of operating in the region?

“The biggest challenge are the transport links. The rail link from London is particularly slow and expensive at commuting times.

“Getting from train stations to places of work can be difficult because local travel is impeded by the heavy traffic on the A27 and opportunities for safe cycling from local towns is affected by busy roads and limited cycle paths.

“Whilst local people are an advantage, access to people with different skills can also be a challenge as they often do not want to relocate to the area.”

What single change could have the biggest impact for business in the region?

“Create towns that provide a great place to live where ‘Instagram worthy venues’ such as restaurants, hotels, activities, cafes, cinemas and theatre are in close proximity to businesses. Enable digital and AI business to grow rapidly in this area by offering incentives to business owners to move here.”

What other innovations would you like to see?

“An incentive to build or rent facilities could help attract business, as well as temporary tax exemptions.

“If we could ease planning permission for unique hotels and increase seaside tourism this might make the area more attractive. Perhaps create artistic quarters, literary centres or water sport stations. “I feel we should promote the potential of a great work life balance for those living and working in this area and boost digital hubs, too.

“Ideas to help universities and colleges encourage students to stay after their degrees/ courses and to promote particular specialities such as engineering and software design would be welcome.

“Equally a campaign to encourage the local young people into further education and STEM subjects; as the coast has a low uptake in this area.”



Martin Randall

Director for the Economy, Adur & Worthing Councils

If you had to identify one single ‘need’ for the Worthing and Shoreham area, one problem to solve, what would it be?

“I think it would be about having the strategic transport infrastructure upgraded to a level that matches our aspiration. And by this, I mean the whole infrastructure including the road network; public transport and improved opportunities for walking and cycling. Working at a strategic level with our partners across the Coastal West Sussex sub-region and beyond will be necessary to deliver the ‘game changing’ investment needed to support our financial economies. “

What aspect of potential in the area excites you the most?

“Worthing and Shoreham are both great towns with untapped potential. It is the opportunity to realise that potential that excites me the most. We have a generational opportunity to take a place-making approach to securing a future which delivers the major projects needed on our key sites; to weave this development together with improved public realm; to repair some of the mistakes of the past; to offer world class digital connectivity; and to celebrate what is so great about our location, our history and our culture – all of which is attracting significant investment here already.”

What are the things that towns across the Coastal West Sussex region have in common, despite the obvious differences between them?

“We occupy a privileged position, between the outstanding natural assets of countryside and coast.

“Whilst we don’t share a major industrial legacy, we have growing populations and increasing pressure on land that does become available. Despite this, we can all point toward projects and sites in public

and private ownership that have remained vacant for too long. We have a shared imperative to make the best use of these opportunities and capture the wider benefits for our communities in terms of jobs, homes, community infrastructure and digital connectivity.

“We have made an outstanding start toward delivering next generation digital infrastructure – as we move forward it will be increasingly important to build upon that to ensure that our places thrive in the new economy.”



Dave Cooper

Professor of Management and Economic Development Chichester University

What would you pick out as the biggest challenges for the economic future of the region?

“There’s no doubt in my mind that our emphasis should be on skills. By that I mean not just in schools and colleges, but also the workplace. We need to up-skill our workforce to be ready for the future.

“Beyond that there’s a need for cultural regeneration in the area.

“People moving here are older and want to live by the sea but there’s a tiredness about some of the region, especially Bognor, Littlehampton and parts of Worthing and Lancing, it needs reinvigorating. Its about place and investment in place.”

Are there any other glaring issues which need addressing?

“You can’t shy away from transport issues. “People always talk about the A27 but there’s no point in just fixing the A27 when the A259 is an even bigger problem.

“We need to look at the big picture and be adventurous.

“A tram from Chichester, or even Havant, all the way to Brighton could transform the region. It wouldn’t be cheap, but it would be a big statement.

“Transport needs to be sustainable and environmentally friendly and we need a commitment to make it happen.”

What do you feel the region is ‘missing’ that is required to attract further investment?

“There has not been enough investment in the region over a long period of time and that has taken its toll.

“There are areas of deprivation along the coast and that does impact on the number of businesses wanting to invest here.

“Productivity is an issue because the GVA per head is too low and we need to change that. Again, skills are the key.”

What are the biggest assets the region has to offer?

“There’s real untapped potential here and there is space available for development. It’s relatively less expensive than the rest of the south east, cheaper than Brighton, for instance.

“It’s accessible despite our transport issues and it’s creative, too. It’s a good place to live. We should believe in its potential.



Pamela Kent

Head of Marketing and Development
Worthing Theatres and Museum

What part can culture play in the economic development of Worthing and Adur - and Coastal West Sussex as a whole?

“Culture can have a hugely significant impact both economically and socially; in terms of social well-being and other community benefits. The economic and social benefits of arts and heritage can sometimes be difficult to quantify but is central to stakeholders, funders, local communities and anyone with an interest in culture being able to appreciate just how important these venues are to the local community and local economy. “

Are there any plans or ideas already up for discussion?

“There are exciting and ambitious plans for our programme and all Worthing Theatres and Museum venues; the museum and the Pavilion Theatre having had substantial research and insight into improvements already. Watch this space, these plans when implemented will change and improve the cultural landscape of Worthing.”

What is it about cultural projects which attracts business and investment to a region? Why does it work as a pitch to central government and to big business?

“Central government and big business are both clear in their understanding of the really tangible economic and social impact cultural projects can have; they are attractive to those groups because they are truly inclusive of all groups in our community and equally gather a huge media following if communicated clearly so they elevate the projects to a national audience.”

What single change could have the biggest impact for business in the region?

“More investment, more partnerships to achieve a shared ambition.”

A view from ...

Littlehampton



Henry Powell

Client Director Inpress Plastics,
Littlehampton

What do you think is different about the needs of Littlehampton compared to other towns in Coastal West Sussex?

“It’s much the same as other towns in the region, it’s very typical of the area. But, of course, there are some needs which are different, and which make investment vital.

“Skills and education attainment is a real challenge. Littlehampton has one of the lowest educational attainment levels in West Sussex and contributes one of the lowest economic output per capita along the coast. So, there are challenges. But investment is already starting to make a difference and I feel the potential of the region is huge.”

What would you pick out as the biggest issue for Littlehampton to achieve its potential?

“Transport is obviously an issue, as it is across Coastal West Sussex, but I would pick out education because if we can push up educational standards it would benefit the area enormously.

“Better training for school leavers, too, and helping business to up-skill the workforce.”

Bognor Regis



Caroline Wood

Director, Coastal West Sussex Partnership,
lives in Bognor Regis

What would you pick out as the specific needs for Bognor in terms of its economic future?

“There isn’t one specific need, it’s a mix of improving the skills and highlighting the job / career opportunities that exist locally; improving connectivity, and that’s road, rail and digital infrastructure across the area and making sure there is a balance between residential and commercial development so that the town can thrive for both business and residents.

“The business profile in the town tends to be predominantly low paid and low skilled employment. So to help drive change, a network of innovation hubs that would support and nurture new businesses; help drive business growth and build on the strengths of the University that is based in the town could help create a shift in the business makeup.

Are there any issues in Bognor Regis which are different to other towns in the Coastal West Sussex region?

“I’m not sure the challenges for Bognor Regis are different from other coastal towns “It has a mix of social problems that are often multi-generational - so breaking that cycle can be difficult.

“Specifically, for Bognor Regis, a lot is already happening but there is a need for strong and sustained leadership, not necessarily political leadership as that can be subject to change, but leadership that will help galvanise partners, build a shared and creative vision that’s based on outcomes and then work collaboratively to deliver it. More consistency for a longer time frame will be important to help ensure further, positive change is delivered.”



A small selection of our major employers

Chichester

- » University of Chichester
- » Goodwood
- » Rolls Royce Motor Cars
- » Vitacress Herbs
- » Carte Blanche Greetings
- » Montezumas
- » Oceanair
- » Chichester College



Bognor Regis

- » Heirlooms
- » Barfoots of Botley Ltd
- » GTR Composites
- » Butlin's
- » Covers Timber & Builders Merchants



Littlehampton

- » The Body Shop
- » Dando Drilling International
- » S I Protech Ltd
- » Finecast Foundries Ltd
- » Fittleworth Medical
- » BASF



Worthing

- » Bowers & Wilkins
- » Rayner Optics
- » GSK
- » Allergy Therapeutics
- » Electronic Temperature Instruments
- » Worthing College
- » Greater Brighton Metropolitan College



Chapter Three: A coastal pathway to success And why unity is Coastal West Sussex's biggest attribute for investment

Conclusion, by Henry Powell

What is most remarkable about a region which brings together five seaside towns in one collaborative approach for investment and transformation is the unity of our vision – and the strength of our determination to make it happen

Building an identity for Coastal West Sussex is a challenge, even though this white paper has shown just how much we have in common, but what has already been achieved is a collective acceptance to grasp an opportunity to transform the region for good.

The pathway to success and the investment requirements to achieve it are not without complications and it is certainly a long-term goal, best achievable over a period of 10 to 20 years.

To make it happen we need to push up educational standards, attract investment to build more commercial and industrial space and certainly to improve our travel infrastructure.

The latter requires key decisions from government to tackle the problem of the A27, starting with the Arundel Bypass.

Tackling transport issues would send out a big message that things are moving in Coastal West Sussex, where we already host some of the UK's most outstanding businesses and are experiencing real and sustained growth.

There is no doubt that we have a bright future if we can attract more digital and tech companies to Coastal West Sussex, and our message to businesses is that they will find a warm and united welcome here.

We are already aiming to ensure gigabit fibre is installed throughout the whole region and we must continue to invest in the digital infrastructure. We

need to build more commercial and industrial space to support businesses that will be able to benefit from this technology.

The good news is that one of our biggest strengths is we are, as a region, very much of one voice.

Our partnership includes chief executives of the local councils as well as representatives of county councils and an array of successful businesses.

So, together, local government and business are working towards the same aim, to realise the untapped economic potential of the coast. We very rarely disagree, we are consistent with what we want and we have enough vision to get us there. That's a powerful package.

If a business can come into an area and find everyone supportive of business growth that's vitally important.

When it comes to planning, there is still a lot of red tape from government, of course, and processes handed down which must be adhered to.

But our message to businesses is that you will find your local council and planning office across Coastal West Sussex very supportive of investment in commercial and industrial space.



The partnership works together to promote larger developments for businesses coming into the region and each of the local councils has a strategy they are working to, with land already earmarked for development.

Everything is in place to support a vision of transforming the economy and infrastructure of Coastal West Sussex, revitalising and redefining the region for businesses, residents and tourists in the process.

The work-life balance that so many people strive for is already on offer, with all the benefits of the sea and Downs to enjoy.

The opportunities for business growth, economic prosperity and the potential to improve educational and living standards are also tantalising within reach.

It's time to reach out together and grasp them.

A vision for the future

Professor Dave Cooper

Professor of Management and Economic Development, Chichester University

To create a pathway to success we need a shared vision specific to the area rather than generic - and already you can see that Coastal West Sussex is making impressive progress.

The next step is to understand the components of that vision and map out a programme of work to deliver against it

What's needed most of all is tangible action so that our ambitious plans don't just sit in a draw and become a wish list that never sees the light of day.

The pathway should begin with three or four initiatives that can really happen - and a collective desire to ensure they do.

We need to think long-term – up to 10, 15 or even 20 years ahead if we want to build a tram line from Havant to Brighton, for instance. But, equally, we need to measure the small steps that take us there and consider the hurdles in our way.

One of the biggest issues is to counter the assumption that because all of the South East of England has a vibrant and booming economy it doesn't need investment or help.

That premise simply isn't true. The reality is that the South East economy is flatlining, it's not going up. If you look at other countries in Europe and around the world the coastal economy isn't doing very well in comparison and it should be performing much higher. It's a problem that's not talked about and which masks the problems we face here.

In the meantime, we should be looking to attract and grow digital and technology business in Coastal West Sussex to begin an economic revival that can sustain the progress we plan.

These are the types of businesses which can underpin everything else we do, and training is vital to prepare the local workforce.

If anyone doubts that it can be achieved, then they should look at other areas where investment and a collective strategy is already making a difference. I'd pick out Lincoln. It may not be a coastal region, but it has a similar story to Coastal West Sussex and a lot of thought has gone into transforming it. Now the city is starting to make progress.

Bournemouth has done well, too, by attracting finance and insurance businesses to the area. The town was old and tired before but now has a new vibrancy.

Chichester University is committed to supporting initiatives to create similar economic growth here, including creating centres of excellence and open innovation forums where cluster working and shared spaces help develop new ideas.

My challenge for Coastal West Sussex is to really focus on people to drive skills development at this early stage of our planning.

If we can engage schools, colleges and local authorities to buy into our vision and agree a common agenda, then the pathway to success is laid open before us.

What goal would you set Coastal West Sussex?

Bev Lees

I would set Coastal West Sussex the goal of transforming the coastline from Shoreham, Worthing, Littlehampton and Bognor as one continuous stretch of town planning that excites the visitor be it industrial port, watersports, house boats or cafes; that encourage businesses to relocate or develop in Coastal West Sussex. At the moment, the towns are disjointed and the industrial areas for businesses require investment and development to make them appealing for new companies. Connecting areas of interest creates a visitor/resident experience encouraging people and businesses to move and stay in the Coastal West Sussex region.

Caroline Wood

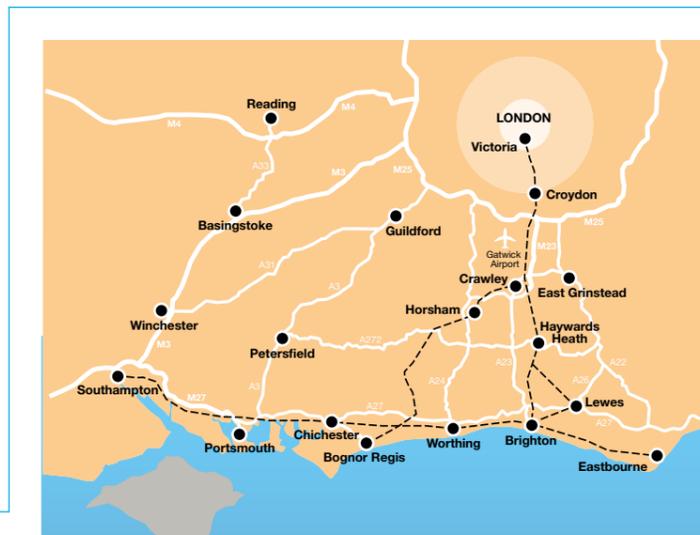
The goals I'd set would be twofold: create a network of Innovation and Tech spaces or hubs that better use the new digital infrastructure and support new business growth. Alongside this would be to improve educational attainment; encourage more companies to get involved in the skills agenda by helping to inspire and support both young people and those already in the workplace to be ready for new future job opportunities.

Martin Randall

The vision for Coastal West Sussex should be one of intelligent growth where our community benefits and prospers from the right interventions to support and guide investment in our places. Increasingly, this is going to be about forming effective partnerships and working effectively across the sectors to deliver real solutions to complex challenges such as transport and connectivity.



Connected to businesses locally, regionally, nationally and globally



What are the golden threads that connect Coastal West Sussex?

An urban area between the coast and the SDNP with shared needs and potential

Huge untapped economic potential

A region still too reliant on tourism and retail – but ready for investment

High potential for work-life balance

Lower than average educational attainment

An unmatched willingness to work together to attract investment

Rail and road transport challenges, particularly the A27 and A259

Well positioned to benefit from the economic and cultural glow of Brighton and Chichester

Proximity to the City of London, Gatwick Airport and the ports of Dover, Southampton and Portsmouth

Fast-growing and influential universities

Town centres in need of redevelopment and willing to welcome investors

Booming new tech and digital industries, including digital software development, medical technology and motor engineering

A growing number of high-profile employers from Rolls Royce to GSK

Be a part of the Coastal West Sussex Partnership
so that together we can...

Promote

by raising the profile of the coastal area
through events and across media channels

Deliver

key projects that will enhance and develop
the coastal economy

Lobby

for investment into key infrastructure and
development projects

Influence

by bringing the business voice into key
investment and policy decisions

Work in Partnership

working together to champion the
coastal West Sussex area

Champion

championing the coastal West Sussex
economy and be a vocal advocate for the area