



COASTAL WEST SUSSEX

DATA PROFILE

SEPTEMBER 2022

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EXECUTIVE SUMMARY

The Coastal West Sussex Area

Coastal West Sussex (CWS) runs from Selsey and Chichester in the west through Bognor Regis, Littlehampton, Worthing and Shoreham to the borders of Brighton & Hove in the east. Administratively it is overseen by Chichester District Council, Arun District Council, Worthing Borough Council, Adur District Council and West Sussex County Council.

It has 457,545 residents¹ and 20,025² businesses employing 180,000³ people and its economy is worth £10.45 billion⁴.

Turbulent Times

Since the last economic profile was produced in 2018, the business environment has been transformed. The United Kingdom officially left the European Union on 31 January 2020, nearly four years after the referendum.

A month later, Covid-19 swept into the country causing economic and social havoc. People were forced to stay at home, business had to close and the country's health system creaked under pressure to respond to the unprecedented wave of illness.

¹ Population Estimates (2022) . ONS via NOMISWEB

² UK Business Counts, 2021, ONS via NOMISWEB

³ Business Register & Employment Survey, 2020, ONS via NOMISWEB

Businesses were kept afloat by large scale government intervention, whilst new supply chains emerged to support shifting demand for healthcare products and services. Technology came to the rescue as on-line platforms were developed, enabling people to work remotely, and hybrid approaches became the mainstream approach to working and learning in many sectors, accelerating practices that had already been tentatively in train.

Then in February 2022, Russia invaded Ukraine, a major producer of iron, steel, cereals and animal/vegetable fats & oils. The heightened geopolitical tensions and western European dependence on Russian oil and gas fuelled a massive hike in the cost of energy. Household energy bills increased by 54% in April 2022 and can expect to reach around £3,600 by October 2022, and possibly climb even higher.

These shocks have had a major impact on the international and national economies. The Consumer Price Index (CPI) inflation rate reached 10.1% in July 2022 and Bank of England forecasts expect it to peak at 13.3% in Q4 2022/23.

Some forecasts suggest an even higher peak than this. Interest rates are being raised, household incomes are being squeezed, businesses' are being stretched, industrial relations are being tested and the general economic climate is more volatile than it has been for a generation.

⁴ Source: Regional gross value added (balanced) by industry: local authorities by International Territorial Level (ITL) 1 region: TLJ South East; (2020); ONS

Signs of Resilience

Local businesses and their public sector partners cannot control external macro-economic conditions, but they can take steps to ensure that they are as resilient as they can be to withstand the headwinds and to take advantage of the tailwinds.

It is too early to know what the long-term impacts of Brexit and the Covid-19 pandemic have been on Coastal West Sussex businesses. Some indicators suggest signs of resilience, whilst others suggest areas of fragility. Between 2018 and 2020, the Coastal West Sussex economy shrank proportionately less in real terms than across West Sussex and England as a whole, strengthened by a relatively buoyant Worthing.

Sectors that held up well economically through the pandemic were Human Health & Residential Care, Real Estate and Information & Communications; whilst several sectors, including Accommodation & Food Service, Arts, Entertainment & Leisure and Transport & Storage lost significant value

Productivity remained relatively resilient in Coastal West Sussex, again almost exclusively due to high productivity in Worthing, which in terms of GVA per hour is one of England's top performing local economies.

Claimant count unemployment did not rise as fast in Coastal West Sussex as it did in the county as a whole and recent average earnings growth in Worthing and Arun has been strong compared with the county, the region and England.

Against this, job creation and business formation have been modest and much of the strong performance seems to mask intra-area differences, with the economic strength being disproportionately concentrated in Worthing.

Distinctiveness and Strengths

Historically, the Coastal West Sussex economy has been characterised as low value and low skill, but this may not be quite a fair reflection. GVA per head, which has previously been used to demonstrate productivity is a very weak measure. Real productivity is measured by GVA per hour worked or by job filled. By this definition, Coastal West Sussex is more productive than the north east of the West Sussex, although it is still below that of the region.

It is Worthing that is driving this and it may be related to the exceptionally strong economic contribution of manufacturing to its economy. Some sectors are high value, but in employment terms low volume. Policy priorities to support businesses need to reflect this: Strong economic sectors do not readily equate to high employment sectors.

The business profile of Coastal West Sussex is very different from its employment profile. It has business concentrations in Management Consultancy, several Construction subsectors, Motor Vehicle Maintenance

and Real Estate lettings. Its small, niche specialisms mainly relate to the land-based sector.

Its employment distinctiveness is focused towards service sector industries including Hospitals, Holiday Centres, Education, Residential Nursing Care, Public Houses & Bars and Non-Specialised Retail although Land Based Industries, Motor Vehicle Manufacture and Insurance also feature.

Niche specialisms can be represented by a very small number of businesses, but these can be what makes an area distinctive. Broad brush approaches to supporting sectors with high volumes of businesses or employment across a wide spatial area may mean that some specialist businesses are overlooked.

There is data evidence to suggest the emergence of Video Production as an important sub-sector in Worthing, for example; niche manufacturing features strongly in Adur; land based and tourism related activities feature in Chichester; and Arun has some niche specialisms in Water Projects, Amusement Parks and Satellite Communication, for example.

Coastal West Sussex has a strong visitor economy, but the economic value of this is heavily focused on Chichester and Arun. Despite its large number of tourism related businesses, Worthing's visitor economy is fairly weak: People who visit spend less and stay for a shorter periods than in Arun, for example, and business tourism across the whole area is not strong.

What Next Coastal West Sussex?

Demographics and Labour Supply

It is impossible to ignore the potential impacts of projected demographic changes to Coastal West Sussex. By 2030 there are forecast to be nearly 32,000 more residents living in the area than there were in 2020. But 26,000 of these will be of post-working age.

Many businesses already face recruitment challenges, perhaps exacerbated by Brexit. There are signs of a loosening of the labour market, but this may only be a temporary reprieve. There is no guarantee that those on its fringes will have the skills required to fill the vacancies, whilst the cost of housing relative to incomes is high compared with many parts of England, making it difficult to compete in a wider labour pool

Investment in skills may address this to some extent, but obsessions with levels of attainment, rather than actual skill acquisition can easily distort perceptions of the skills base within an area.

Alternative, less labour intensive, ways of improving products and services may need to be sought, including taking advantage of the better digital infrastructure that is becoming available across the area.

Worthing as an Economic Driver

It is difficult not to conclude that Worthing is a strong economic performer. The structure of its economy combines a strong public sector, particularly in relation to healthcare, with a robust and productive manufacturing base and an emerging creative sector.

Both qualitative and quantitative evidence suggests that Worthing is beginning to emerge as an economy of some stature. It is at the centre of the Creative Coast, it has an emergent Video Production cluster, and it seems to be benefitting from overspill from neighbouring Brighton & Hove.

Its central location within Coastal West Sussex and its urban density mean that it is well-positioned to act as a hub through which economic strength could be spread to a wider hinterland.

However, this is not a one way street. Its visitor economy is weak compared with those of Arun and Chichester, and it needs to develop a distinctive and complementary offer to those of its neighbours, if it is to pull its weight in this respect.

The Public Sector

The public sector is an important feature of the Coastal West Sussex economy: It is a major employer of people at all levels and it is a major economic contributor in terms of GVA.

It is simply not a truism that the public sector does not create wealth: It does, both directly and through its supply chains. If the Covid-19 pandemic taught us anything it is that the demand for goods and services can change rapidly. Kiosks that previously dispensed chocolate bars and fizzy drinks started to sell face masks and hand sanitisers.

How the public sector uses its purchasing power to support local supply chains can have an impact on the performance of local businesses. In short, the public

sector can market make and bend its spending to strengthen local supply chains. It can lead on the experimental application of digital and other technologies to improve services and act as testbeds to try out new ideas and innovations at scale.

It also has a role as convener, facilitator, arbiter, signaller and, even with tight constraints, funder, in how to shape both the perceptions and the reality of place. The key is in developing and sticking to missions and in taking an holistic, rather than an atomised, approach to delivering efficiency, effectiveness and inclusivity.

Using Our Natural Assets

The outstanding natural assets within Coastal West Sussex are well-known. They influence the structure of the economy, in relation to the horticultural and agricultural industries and their supply chains, the visitor and green economies and the activities around Shoreham Port.

There is already knowledge exchange activity aimed at improving the energy efficiency of the land based sector, the Rampion Windfarm is a major producer of renewable energy, and other initiatives are being developed to support Net Zero goals. How Coastal West Sussex makes the best use of its natural assets, could have a significant role in developing a robust and sustainable economy in the future.

Innovation and Knowledge Exchange

Too often economic profiles and policy approaches to fix problems or to exploit opportunities are too broad. Granularity is often what is required; supporting the specific needs of businesses in niche sectors that have the potential to deliver high value and create new employment.

Coastal West Sussex has a number of niche businesses in the Advanced Manufacturing; Creative, Digital & IT and the knowledge economy sectors. These include in Aerospace & Transport; Computing & Advanced Electronics; Medical Devices; Software Development; and Creative Content.

Growth oriented businesses within these sectors could be identified and provided with effective support, ensuring that they are linked into research institutes, universities and innovation networks and so that they effectively utilise opportunities associated with better digital infrastructure.

INTRODUCTION

This report has been commissioned by the Coastal West Sussex Partnership to provide an up-to-date assessment of the Coastal West Sussex economy in 2022. It aims to understand its strengths and challenges along with the key drivers and barriers to growth from a data perspective.

It is designed to provide an evidence base to aid the development of future strategies and plans, to support bids for future economic development funds and, equally importantly, to continue to raise the profile of the coastal area among stakeholders, including Government.

Coastal West Sussex

Coastal West Sussex runs from Chichester and Selsey in the West, through Bognor Regis, Littlehampton, Worthing and Shoreham to the borders of Brighton & Hove in the east. It is comprised of four local authority areas: Adur, Worthing, Arun and Chichester and is within the West Sussex County Council area.

It is an area of high ambition and untapped economic potential, with rich and distinctive natural and built environments, surrounded by the sea and the South Downs National Park, all within a short commute of London, Brighton & Hove, Gatwick and Heathrow Airports, and the seaports of Portsmouth, Newhaven and Southampton.

Despite its superb location, it is an area of contrasts that lacks a clear economic identity, is hampered by its seaside tourism history and by under investment in

skills, property and infrastructure. Highly affluent areas are close to much less prosperous 'seaside' towns, historically resulting in underperformance on a number of indicators, compared with the wider region, including neighbouring Brighton & Hove.

Context

Since the last Coastal West Sussex Economic Assessment, the international, national and local contexts have changed in ways that could not have been predicted.

The Covid-19 pandemic swept through the world and first entered the UK at the end of January 2020. What followed was unprecedented in recent history. As it battled to prevent the National Health Service from being overwhelmed, the Government introduced what, in normal times, would have been draconian measures.

The first nationwide lockdown started on 26 March 2020, with people being ordered to stay at home. In June 2020, restrictions began to be eased and a local approach was adopted in July 2020. On 5 November 2020 a second national lockdown came into force and, following further easing a third national lockdown started on 6 January 2021. From then on, as the vaccination programme was rolled out, there was a step-by-step process to easing restrictions until all measures were removed on 1 April 2022.

The Covid-19 pandemic had a profound impact on the economy - shrinking it by 9.7% in 2020. It also changed the way in which people work, the long-term implications of which unclear.

New platforms emerged enabling people to work remotely, reducing the need to travel and to meet face to face.

Alongside this, Brexit continued to impact how the UK engaged with the European Union and the rest of the world, with differing views about what this would mean for business and the UK over the long term. Then, in February 2022, Russia invaded Ukraine, providing a further shock to an already fragile global economy.

As of July 2022, UK inflation was 10.1%, the highest for 40 years, with energy bills, in particular, putting huge pressure on businesses' and people's incomes. We are currently operating in a period of significant economic and political uncertainty and with a new Prime Minister likely to focus on getting inflation under control in the immediate future.

The Bank of England has raised interest rates and is forecasting a deep recession, which could last until the beginning of 2024.

European Union funding, which has been used extensively to support economic development projects, is being replaced by the UK Shared Prosperity Fund (UKSPF).

The Government has also targeted capital resources to local areas through the Levelling Up Fund (LUF), the Towns Fund (TF) and the Future High Streets Fund (FHSF), with both Bognor Regis and Littlehampton benefiting from successful LUF bids.

The new funding arrangements are likely to be less generous than previously and coastal areas in the south of England will need to make strong business cases if they are to compete for funding with the so-called 'red wall' areas of the north of England, which is the focus of much of the Government's Levelling Up agenda.

Method

The most recent publicly available data has been collected for this report. It has updated the Coastal West Sussex Profile (September 2019). The most significant difference is the inclusion of indicators relating to the environment and energy consumption.

Where possible data are shown for Coastal West Sussex and its component districts and boroughs, benchmarked to West Sussex, the South East region and England.

One of the aims of this profile is to try to establish how effectively Coastal West Sussex has withstood the impacts of Covid-19. In some cases this has been possible, but in others it is less easy to assess this. Datasets are published at different times throughout the year. This means that the latest data are often shown for 2020. Where possible, short term trend data (generally, 2018-2020) have been used.

Data have its limitations, particularly at local level. Most data are survey-based. This means that, at district/borough level, confidence margins can be quite wide. How data are classified also needs to be considered carefully. Whilst Standard Industrial Classification codes are helpful, data may not always

be shown in the way that highlights all the strengths and weaknesses in an economy. This assessment includes sectors that do not easily fit into a single SIC code: Advanced Manufacturing & Engineering; Creative, Digital & IT; and Tourism.

Understanding an economy requires the interaction of data analysis with qualitative local insight: data can often state the 'what', whilst local insight can often better explain the 'why' and 'how'. One final note of caution is that it can be easy to focus on single pieces of data at the expense of a wide range of variables.

Economic data may not always point in the same direction and a weak understanding of what the data actually means can lead to conclusions that may appear sound, but may actually be less so.

Data are useful to stimulate debate, to challenge assumptions and to try to bring some clarity and evidence to support decision-makers to make the right decisions for their businesses and the wider economy. The assessment is structured under the following main headings:

- Business Profile
- Employment Profile
- Economic Performance
- People & Well-Being
- Housing & Environment

Each of these sections has a number of sub-headings. Data are presented in tables with short supporting commentary. The report's annexes show SIC codes that have been used to calculate the profiles of the

Advanced Manufacturing & Engineering, Creative Digital & IT and Tourism sectors.

BUSINESS PROFILE

Business Profile – Key Points

- There are 20,025 businesses in Coastal West Sussex, which is nearly half the West Sussex business population
- The Coastal West Sussex business population grew by 1,325 (+7.1%) between 2015 and 2020. This is below the rate of increase in West Sussex (+8.5%), the South East (+10.6%) and England (+13.0%)
- Arun has seen the most significant increase in its business population both in numerical and percentage terms. It is too early to tell whether this reflects a trend towards people starting businesses more remotely from their customers.
- Business formation rates in Coastal West Sussex tends to be similar to that in West Sussex, but below those of the South East and England.
- There was a steady reduction in the business formation rate between 2015 and 2020, a pattern reflected across West Sussex, the South East and England
- There are many factors that influence business churn. These include the sector structure of the local economy, regulatory factors, population growth and urban density.
- In some sectors, business creation is low risk, low cost and low impact; in other sectors the reverse is the case.

Business Population

There were 20,025 active businesses in Coastal West Sussex in 2020, accounting for 49.3% of businesses in West Sussex, 4.3% of businesses in the South East region and 0.75% of England's businesses.

Table 1: Number of Active Businesses 2018-2020

	2018	2019	2020
Adur	2,575	2,610	2,605
Arun	5,850	6,005	6,090
Chichester	6,870	6,950	6,990
Worthing	4,245	4,315	4,340
Coastal West Sussex	19,540	19,880	20,025
West Sussex	39,440	40,090	40,580
South East	448,645	461,745	464,950
England	2,571,980	2,639,250	2,653,080

Source: Business Demography, Office for National Statistics

Chichester (35%) has the largest share of businesses in Coastal West Sussex, followed by Arun (30%) Worthing (22%) and Adur (13%).

Since 2018, the number of businesses has increased by 2.5%. This is a slower rate of increase than West Sussex (+2.9%), the South East (+3.6%) in England (+3.2%).

2020 may be too early to capture the impact of the Covid-19 pandemic on business stocks. There was an increase of +145 businesses in Coastal West Sussex between 2019 and 2020.

Arun (+240) had the biggest increase in businesses, followed by Chichester (+120), Worthing (+95) and Adur (+30). The percentage increase in Arun (+4.1%) was higher than in West Sussex (+2.9%), but below the South East (+3.6%) and England (+3.2%). In all other

districts & boroughs the percentage increase was below that of West Sussex, the South East and England.

It is too early to tell whether this is a long-term trend and if it reflects the greater ability for people to work remotely from their customers.

Business Births

In 2020, 2,025 new businesses were formed in Coastal West Sussex.

Table 2: Business Births per Active Business 2018-2020 (%)

	2018	2019	2020
Adur	9.9%	10.2%	10.0%
Arun	10.3%	11.0%	10.6%
Chichester	9.8%	9.3%	9.1%
Worthing	12.2%	11.0%	11.2%
Coastal West Sussex	10.5%	10.3%	10.1%
West Sussex	10.5%	10.4%	10.5%
South East	11.7%	11.9%	10.9%
England	12.9%	13.2%	12.1%

Source: Business Demography, Office for National Statistics; 2018-2020

This is 10.1% of the business stock and is marginally below that business birth rate in West Sussex (10.5%) and the South East (10.9%) and somewhat further below that rate for England (12.1%). This has fallen slightly since 2018, but in 2015 and 2016, the business birth rate was above 12%.

Worthing had the highest business birth rate (11.2%), followed by Arun (10.6%), Adur (10.0%) and Chichester (9.1%).

The business birth rate in Coastal West Sussex has been slightly below the rate in West Sussex and more markedly below those of the South East and England since 2018.

Business Deaths

The rates of business closures in Coastal West Sussex have been between 10.0% (in 2017) and 9.1% (in 2020)

Table 3: Business Deaths per Active Business 2018-2020 (%)

	2018	2019	2020
Adur	9.1%	9.8%	8.4%
Arun	9.6%	9.3%	9.3%
Chichester	9.0%	9.0%	9.1%
Worthing	9.7%	10.3%	9.1%
Coastal West Sussex	9.3%	9.5%	9.1%
West Sussex	9.4%	9.6%	9.2%
South East	9.6%	10.2%	10.0%
England	10.9%	10.9%	10.7%

Source: Business Demography, Office for National Statistics; 2018-2020

This is similar to that of West Sussex since 2018 and below those of the South East and England. In 2020, Adur (8.4%) had the lowest rate of business closures, followed by Worthing (9.1%), Chichester (9.1%) and Arun (9.3%)

Business Churn

There has been a steady, but consistent reduction in the rate of business formation since 2015, but this largely reflects the pattern in West Sussex, the South East and England. Alongside this, business closures have remained fairly consistent over the period with a

possible outlier year in 2017. Again, this largely reflects the patterns in West Sussex, the South East and England.

Understanding the implications of business churn is not straightforward. If considered in isolation, this variable may not capture issues of consolidation or dispersion. Low birth and death rates may also reflect an absence of economic dynamism, whilst higher churn may indicate dynamic creative destruction.

Other factors, including population growth, regulatory changes and local economic structures also influence churn rates. Many service sector businesses have low entry costs and can be low value, whilst churn tends to be higher in more densely populated urban area.

Nationally, Production, wholesale, motor trades, health and arts, entertainment, recreation and other services have the lowest birth and death rates, whilst transport & storage, business administration & support services, and accommodation & food services sectors have the highest churn rates.

The Office for National Statistics⁵ has noted a significant rise in the number of single person courier companies to meet the demand from home deliveries. These are often registered for a short period of time and can have a distorting effect on the data.

⁵ Business Demography Statistics Release (2019), Office for National Statistics

Business Structure

Business Structure – Key Points

- Micro businesses predominate in all economies and Coastal West Sussex is no different - Arun has the highest proportion of micro businesses, Worthing has the lowest
- Only 120 businesses have 100 or more staff and just 50 have over 250, 40 of which are in Worthing and Chichester.
- More than 90% of businesses have a turnover of less than £1 million and just 160 have a turnover of over £10 million.
- Construction Wholesale & Retail and Professional, Scientific & Technical Activities account for nearly half of all businesses, but this is the case in most local economies. Coastal West Sussex has concentrations in Manufacturing, Construction, and Public Administration/Defence, but is underrepresented in Energy/Gas/Water, Transport & Storage and Financial & Insurance Services.
- There is some evidence that, in terms of the number of businesses the tourism sector has been resilient through the pandemic
- Niche sectors show the importance of the land and sea to the type of construction and manufacturing businesses in Coastal West Sussex. Management and Computer Consultancy is important locally and the Video

Production is a subsector that is distinctive to Worthing.

Business Size – Employees

In all areas, micro businesses predominate. In Coastal West Sussex 79% of all businesses have 0-4 staff and 90% employ fewer than ten staff. This is a similar pattern in West Sussex, the South East and England.

The table below shows the proportion of businesses that are Micro (0-9 employees); Small (10-49 employees; Medium (50-249 employees; and Large (250+ employees).

Table 4: Businesses by Sizeband (2021) – Employees (%)

	0-9	10-49	50-249	250+
Adur	89.8%	8.1%	1.7%	0.2%
Arun	90.3%	8.5%	1.0%	0.1%
Chichester	90.1%	8.3%	1.3%	0.3%
Worthing	89.6%	8.4%	1.6%	0.5%
Coastal West Sussex	90.0%	8.4%	1.3%	0.3%
West Sussex	90.1%	8.2%	1.4%	0.3%
South East	90.3%	7.9%	1.4%	0.4%
England	89.8%	8.3%	1.5%	0.4%

Source: UK Business Counts: Enterprises by Employment Sizeband 2021

There is very little difference in the structure of businesses in terms of size in Coastal West Sussex and the benchmark areas. Arun (90.3%) has the highest proportion of micro businesses and Worthing (89.6%) has the lowest proportion.

Coastal West Sussex has 120 businesses that have 100+ staff and just 50 that can be classified as large businesses (250+ employees) – 40 of which are in either Chichester or Worthing. Whilst Coastal West Sussex has 49% of all West Sussex’s micro businesses, it only has 41% of its large businesses.

Business Size - Turnover

In terms of turnover, Coastal West Sussex (91.5%) has a notably higher proportion of micro businesses (< £1million) compared with West Sussex (90.9%), the South East (90.4%) and England (90.8%). Worthing (92.4%) has the high proportion of micro businesses by this measure and Adur (90.2%) has the lowest.

Table 5: Businesses by Sizeband (2021) – Turnover (%)

	<£1m	£1m- <£2m	£2m- <£5m	£5m- <£10m	£10m+
Adur	90.2%	4.3%	3.2%	1.1%	1.3%
Arun	92.0%	4.0%	2.7%	0.7%	0.4%
Chichester	90.9%	4.5%	2.8%	0.9%	1.0%
Worthing	92.4%	3.4%	2.3%	1.0%	1.0%
Coastal West Sussex	91.5%	4.1%	2.7%	0.9%	0.9%
West Sussex	90.9%	4.0%	2.8%	1.1%	1.2%
South East	90.4%	4.2%	2.9%	1.1%	1.4%
England	90.8%	4.0%	2.8%	1.1%	1.3%

Source: UK Business Counts: Enterprises by Turnover Sizeband 2021

Coastal West Sussex has 160 businesses that have a turnover of £10+ million staff – just over one third of West Sussex’s (450) large businesses. This is +30 more than there were in 2018.

Forty percent (65) of Coastal West Sussex’s large businesses are in Chichester and a further 24% (40) are in Worthing. Adur has 30 large businesses and Arun has 25.

All economies are dominated by micro businesses, but employment is concentrated in larger businesses. This matters when defining the aims of interventions to support the local economy. Support aimed at micro businesses is likely to support businesses, but those

that are aimed at larger businesses are likely to have an impact on a greater number of employees.

Business Sectors

Construction (15.8%), Wholesale & Retail (14.1%) and Professional, Scientific & Technical Activities (16.8%) account for nearly half (46.7%) the businesses in Coastal West Sussex. This is similar to most economies.

Table 6: Businesses by Sector (2021)

Sector	Count	Percent	Share of West Sussex (%)	LQ (England)
Agriculture, forestry & fishing	635	3.4%	51.0%	0.9
Mining & quarrying	5	0.0%	50.0%	0.7
Manufacturing	1,080	5.9%	54.4%	1.2
Electricity, gas, steam etc	25	0.1%	29.4%	0.7
Water; sewerage & waste	60	0.3%	54.5%	1.1
Construction	2,915	15.8%	53.3%	1.2
Wholesale & retail	2,605	14.1%	50.9%	1.0
Transport & storage	600	3.3%	40.5%	0.6
Accommodation & food service	1,085	5.9%	58.5%	1.0
Information & communication	1,345	7.3%	44.0%	0.9
Finance & insurance	300	1.6%	40.3%	0.7
Real estate	710	3.8%	53.2%	1.0
Professional, scientific & technical	3,100	16.8%	46.4%	1.0
Administrative & support	1,585	8.6%	45.7%	1.0
Public admin., defence, social security	65	0.4%	61.9%	1.2
Education	315	1.7%	46.7%	1.0
Human health & social work	740	4.0%	53.2%	1.1
Arts, entertainment & recreation	510	2.8%	52.0%	1.1
Other services	785	4.3%	51.5%	1.1
TOTAL	18,460	100.0%	49.5%	1.0

Source: UK Business Counts; ONS via NOMISWEB; (2021)

In broad sector terms, Coastal West Sussex has a concentration of businesses in Manufacturing, Construction and Public Administration, Defence & Social Security. It is under-represented in Electricity, Gas, Steam etc, Water & Gas, Transport & Storage and Financial & Insurance.

Within Coastal West Sussex the Districts have the following business concentrations:

- **Adur:** Manufacturing, Energy/Gas/Water, Construction and Other Services;
- **Arun:** Manufacturing, Water supply Construction, Public Administration, Health & Social Work
- **Chichester:** Real Estate, Professional, Scientific & Technical Activities, Public Administration, Arts/Entertainment/Recreation
- **Worthing:** Construction, Accommodation & Food Service, Information & Communication, Human Health & Social Work, Other Services.

Between 2018 and 2020, sectors that saw an increase in businesses were: Construction (+145); Wholesale & Retail (+45); Transport & Storage (+160); Administration & Support Services (+75), Accommodation & Food Service (+40), and Arts, Entertainment & Leisure (+25). This may suggest that the visitor economy has been quite resilient following the Covid-19 pandemic.

Sectors that lost businesses over the period were: Agriculture, Forestry & Fishing (-75); Information & Communications (-20); Human Health & Social Work (-45); Professional, Scientific & Technical Services (-40), and Other Services (-15).

Table 7: Change in the number of businesses by sector (2018-2021)

Sector	Count	Percent
Agriculture, forestry & fishing	-75	-10.6%
Mining & quarrying	0	0.0%
Manufacturing	0	0.0%
Electricity, gas, steam etc	+10	+66.7%
Water; sewerage & waste	+5	+9.1%
Construction	+145	+5.2%
Wholesale & retail	+45	+1.8%
Transport & storage	+160	+36.4%
Accommodation & food service	+40	+3.8%
Information & communication	-20	-1.5%
Finance & insurance	+15	+5.3%
Real estate	+65	+10.1%
Professional, scientific & technical	-40	-1.3%
Administrative & support	+75	+5.0%
Public admin., defence, social security	+5	+8.3%
Education	+10	+3.3%
Human health & social work	-45	-5.7%
Arts, entertainment & recreation	+25	+5.2%
Other services	-15	-1.9%
TOTAL	+405	+2.2%

UK Business Counts ONS via NOMISWEB 2018-2021

These are very broad sectors, however, and don't tell the real story. It is possible to drill down into detailed sectors to better understand which sector are most important in terms of their distinctiveness to the local area. In each of the districts, a Location Quotient Score of over 100 has been used.

To include very niches activities, all sectors with Location Quotients of over 5.0 have been added to the list, regardless of the number of businesses within them. For Coastal West Sussex as a whole, a Location

Quotient Score⁶ of 300 has been used to reflect the wider geography. The specific business sector strengths are shown below:

Coastal West Sussex

LQ Score 300+: Management Consultancy, Other Business Services, Electrical Installation, Plumbing/heat/Air Conditioning, Construction of Domestic Buildings, Computer Consultancy, Maintenance & Repair of Motor Vehicles, Development of Building Projects, Landscape Services, Joinery Installation, Letting & Operating of Own Real Estate, Other Personal Service Activities

LQ 5.0+, but low volume: Freshwater Agriculture, Activities of Agricultural Holding Companies, Growing of Grapes, Water Collection & Treatment, Manufacture of Milk Products.

Adur

LQ Score 100+: Electrical Installation, Manufacture of Pumps, Plumbing, Heating & Air Conditioning, Manufacture of Electrical Motors, Manufacture of Loaded Electronic Boards

LQ 5.0+, but low volume: Life Insurance, Manufacture of Consumer Electronics, Manufacture of Electronic Components Repair & Maintenance of Ships & Boats, Manufacture of Other Electrical Equipment, Service Activities Incidental to Water Transport, Manufacture of Lifting & Handling Equipment, Treatment & Disposal of Non-Hazardous Waste, Remediation Activities and Other Waste Management Services.

Arun

LQ Score 100+: Management Consultancy, plumbing/heat/air conditioning, Joinery, Maintenance & Repair of Motor Vehicles, Other Business Support Services, Landscape Services, Specialised Construction, Construction of Domestic Buildings, Computer Consultancy, Unlicensed Carriers, Take Away Food Shops

LQ 5.0+, but low volume: Freshwater Agriculture, Satellite Telecommunications, Manufacture of Non-Electronic Measuring Instruments, Manufacture of Plastics, Construction of Water Projects, Manufacture of Other Articles of Paper, Farm Animal Boarding, Manufacture of Bodies for Motor Vehicles, Retail Sale of Hearing Aids, Manufacture of Other Rubber Products, Activities of Amusement Parks

⁶ The Location Quotient (LQ) Score has been calculated by multiplying the number of businesses by the LQ

Chichester

LQ Score 100+: Management Consultancy, , Other Business Support Services, Growing of Vegetables etc., Development of Building Projects, Letting & Operating of Own Property, Landscape Services, Construction of Domestic Buildings, Public Houses & Bars, Growing of Cereals, Mixed Farming, Maintenance & Repair of Motor Vehicles, Other Personal Services, Specialised Design, Computer Consultancy, Other Engineering Activities.

LQ 5.0+, but low volume: Freshwater Agriculture, Repair & Maintenance of Ships & Boats, Manufacture of Caravans, Construction of Water Projects, Non-Scheduled Passenger Air Transport, Operation of Historic Sites & Buildings.

Worthing

LQ Score 100+: Video Production, Management Consultancy, Computer Consultancy, Electrical Installation, Plumbing/heat/air conditioning, Other Business Support, Construction of Domestic Buildings, Licensed Restaurants, Take Away Food Shops

LQ 5.0+, but low volume: Retail Sale of Telecommunications Equipment, Manufacture of Other Rubber Products, Manufacture of Consumer Electronics, Post Secondary Non-Tertiary Education

This approach highlights the importance of the coast and of the land in sectors that are beyond transport, tourism and the land-based industries. The type of manufacturing and construction is influenced by its location. There is evidence of the importance of management consultancy across many parts of Coastal West Sussex and the importance of the land to Chichester becomes clear.

EMPLOYMENT

Employment – key points

There are 180,000 people employed in Coastal West Sussex, over a third (34.4%) of whom are employed in Chichester

There were 6,000 (-3.2%) fewer people in employment in 2020 than there had been in 2018. Proportionately, this is a larger reduction than in West Sussex, the South East and England.

Human Health & Social Work (33,250) employs more than any other sector. There are also concentrations in Agriculture, Forestry & Fishing; Water Supply & Waste Management, Accommodation & Food Service; and Arts, Entertainment & Leisure

Significant subsector concentrations include Hospital Activities, Holiday Centres, non-specialist retail, Agriculture, Processing of Fruit & Vegetables, Primary Education, Manufacture of Motor Vehicles, Pubs & Bars and Residential Nursing Care

There are a wide range of specialisms in different parts of the Coastal West Sussex, some of which are low volume and niche. Employment concentrations tend to be different to business concentrations and are more likely to reflect the role of health, care and the visitor economy to Coastal West Sussex.

Employment Profile

In 2020 there were 180,000 people employed in Coastal West Sussex. This is 45.8% of people who are working in West Sussex and 4.3% of people working in the South East of England. Chichester (34.4%) accounts for the largest share of employees, followed by Arun (27.2%), Worthing (26.7%) and Adur (11.7%).

Table 8: Employment (2018-2020)

	2018	2020	2018-2020 Change	
Adur	22,000	21,000	-1,000	-4.5%
Arun	50,000	49,000	-1,000	-2.0%
Chichester	65,000	62,000	-3,000	-4.6%
Worthing	49,000	48,000	-1,000	-2.0%
Coastal West Sussex	186,000	180,000	-6,000	-3.2%
West Sussex	399,000	393,000	-6,000	-1.5%
South East	4,280,000	4,231,000	-49,000	-1.1%
England	26,809,000	26,671,000	-138,000	-0.5%

Source: Business Register & Employment Survey (BRES), ONS via NOMISWEB; (2018 & 2020)

The number of people employed locally fell by 6,000 (-3.2%) between 2018 and 2020. Most of the reduction occurred between 2019 and 2020, which may have been a result of the Covid-19 pandemic.

Data for 2021 is not yet available, so it is not possible to tell whether there has been a post Covid-19 recovery. The number of employed people fell at a faster rate in Coastal West Sussex (-3.2%) than in West Sussex (-1.5%), the South East (-1.1%) and England (-0.5%). Chichester (-4.6%) and Adur (-4.5%) saw the largest falls across the Coastal West Sussex area.

Employment by Sector

More people are employed in Human Health & Social Work (33,250) than in any other sector. This is followed by Wholesale & Retail (28,000), Accommodation & Food Service (16,500), Education (15,250) and Manufacturing (14,750). Between them, these sectors account for nearly half (49%) of all Coastal West Sussex employment.

Table 9: Employment by Sector (2020)

	Count	Percent	Share of West Sussex	LQ
Agriculture, forestry & fishing	4,775	2.7%	59.7%	1.9
Mining & quarrying	35	0.0%	28.0%	0.2
Manufacturing	14,750	8.2%	50.9%	1.1
Electricity, gas, steam etc	135	0.1%	13.5%	0.2
Water; sewerage & waste	1,800	1.0%	60.0%	1.4
Construction	9,250	5.1%	44.0%	1.0
Wholesale & retail	28,000	15.6%	45.9%	1.0
Transport & storage	4,550	2.5%	14.2%	0.5
Accommodation & food service	16,500	9.2%	53.2%	1.3
Information & communication	5,400	3.0%	41.5%	0.7
Finance & insurance	4,600	2.6%	38.3%	0.7
Real estate	3,675	2.0%	52.5%	1.0
Professional, scientific & technical	11,500	6.4%	42.6%	0.7
Administrative & support	11,750	6.5%	33.6%	0.7
Public admin., defence, social security	6,650	3.7%	60.5%	0.9
Education	15,250	8.5%	47.7%	1.0
Human health & social work	33,250	18.5%	65.2%	1.4
Arts, entertainment & recreation	5,600	3.1%	50.9%	1.4
Other services	3,600	2.0%	45.0%	1.0
TOTAL	180,000	100.0%	45.8%	1.0

Source: Business Register & Employment Survey (BRES); ONS via NOMISWEB; (2018 & 2020)

In broad sector terms, Coastal West Sussex has concentrations of employment in Agriculture, Forestry & Fishing, Water Supply & Waste Management, Accommodation & Food Service, Human Health & Social Work, and Arts, Entertainment & Leisure.

It is underrepresented in Transport & Storage, Information & Communication, Finance & Insurance, Professional, Scientific & Technical Services and Administrative & Support Services.

Within Coastal West Sussex the Districts have the following employment concentrations:

- **Adur:** Manufacturing, Water Supply, Construction, Wholesale & Retail, Information & Communication, Education, Arts, Entertainment & Recreation, and Other Service Activities
- **Arun:** Agriculture, Forestry & Fishing, Water Supply, Construction, Wholesale & Retail, Accommodation & Food Service, Human Health & Social Work, and Arts, Entertainment & Recreation
- **Chichester:** Agriculture, Forestry & Fishing, Manufacturing, Accommodation & Food Service, Real Estate, Arts, Entertainment & Recreation, and Other Services
- **Worthing:** Water Supply, Human Health & Social Work.

Between 2018 and 2020 the sectors that saw the strongest employment growth were Construction (+1,500), Human Health & Social Work (+750), Information & Communication (+700), Agriculture, Forestry & Fishing (+675) and Accommodation & Food Service (+500).

Table 10: Change in Employment by Sector (2018-2020)

Sector	Count	Percent
Agriculture, forestry & fishing	+675	16.5%
Mining & quarrying	+15	75.0%
Manufacturing	+250	1.7%
Electricity, gas, steam etc	-110	-44.9%
Water; sewerage & waste	-50	-2.7%
Construction	+1,500	19.4%
Wholesale & retail	-3,500	-11.1%
Transport & storage	-150	-3.2%
Accommodation & food service	+500	3.1%
Information & communication	+700	14.9%
Finance & insurance	+300	7.0%
Real estate	+125	3.5%
Professional, scientific & technical	-500	-4.2%
Administrative & support	-1,750	-13.0%
Public admin., defence, social security	-950	-12.5%
Education	-2,000	-11.6%
Human health & social work	+750	2.3%
Arts, entertainment & recreation	-100	-1.8%
Other services	0	0.0%
TOTAL	-6,000	-3.2%

Source: Business Register & Employment Survey (BRES); ONS via NOMISWEB; (2018 & 2020)

The most significant employment losses were in Wholesale & Retail (-3,500), Education (-2,000) Administration & Support Services (-1,750), Public Administration & Defence (-950), and Professional, Scientific & Technical Services (-500).

Every district/borough in Coastal West Sussex had a reduction in wholesale & retail employment, perhaps reflecting the challenges that town centres face from on-line shopping.

These are broad sectors, but it is useful to look in more detail at employment in niche subsectors. Using the same approach as for the Business Concentrations earlier, but LQ Score of 5,000 or more for Coastal West Sussex and 2,000 for each of the Districts/Boroughs and an LQ of 4.0 for smaller, niche businesses, the local employment concentrations are:

Coastal West Sussex

LQ Score 5,000+: Hospital Activities, Holiday Centres & Villages, Real Sales in Non-Specialised Stores, Other Activities Auxiliary to Insurance & Pensions, DEFRA Agricultural Data, Other Processing & Preserving of Fruit & Vegetables, Primary Education, Manufacture of Motor Vehicles, Public Houses & Bars, and Residential Nursing Care Activities

LQ = 4.0+ and lower volume: Manufacture of Pharmaceuticals, Residential Care Activities, Other Amusement & Recreation Activities, Water Collection & Treatment, Manufacture of Electronic Instruments, Retail Sale of Cosmetic & Toilet Articles, Manufacture of Dental & Medical Instruments, Publishing of Consumer, Business & Professional Journals, Packaging Activities, and Camping Grounds & Recreational Vehicle Parks.

Adur

LQ Score 2,000+: Other Amusement & Recreation Activities, Other Telecommunications Activities, Other Engineering Activities, Manufacture of Rusks & Biscuits, Other Activities Auxiliary to Insurance & Pensions, and Manufacture of Kitchen Furniture

LQ = 4.0+ and lower volume: Non-life insurance, Manufacture of Other Furniture, Manufacture of Other Plastic Products, Other Construction Installation, Painting, Wholesale of Electronic & Telecommunications Equipment.

Arun

LQ Score 2,000+: Retail Sale of Cosmetic and Toilet Products, Retail Sale in Non-Specialised Stores, Packaging, Residential Nursing Care, Bookkeeping, Other Residential Care, Residential Care for the Elderly & Disabled, Primary Education and Public Houses & Bars.

LQ = 4.0+ and lower volume: Passenger Rail Transport, Amusement & Theme Parks, Manufacture of Electronic Instruments, Camping grounds, recreational vehicle parks, Manufacture of non-domestic cooling and ventilation equipment.

Chichester

LQ Score 2,000+: Other Processing & Preserving of Fruit & Vegetables, Manufacture of Motor Vehicles, DEFRA Agricultural Data, Other Activities Auxiliary to Insurance & Pensions, Hospital Activities, Other Amusement & Recreation Activities, Technical & Vocational Education, Public Houses & Bars, Publishing of Consumer. Business & Professional Journals, Primary Education, Management Consultancy, General Public Administration, Regulation of the Activities of Providing Health Care.

LQ = 4.0+ and lower volume: Camping grounds, recreational vehicle parks; Other Manufacturing, Library Activities, Post-Secondary/Non-Tertiary Education

Worthing

LQ Score 2,000+: Hospital Activities, Manufacture of Pharmaceutical Preparations, Waste Water Collection & Treatment, Residential Care for People with Learning Disabilities, Other Activities Auxiliary to Insurance & Pensions, Manufacture of Electronic Instruments, Other Social Work Activities Without Accommodation, Technical & Vocational Secondary Education, General Public Administration, and Residential Nursing Care.

LQ = 4.0+ and lower volume: Manufacture of Medical & Dental Instruments,

There is a striking difference between looking at the Coastal West Sussex economy from a business perspective and looking at it from an employment perspective. This is an important point when determining the purpose of interventions.

The business profile highlighted the significance of the land and sea and identified the significance of technology, management consultancy. With notable exceptions, this is not how the economy looks from an employment perspective. Employment concentrations are strongly focused on public service activities, notably, health, social care and education.

There is some suggestion of Coastal West Sussex's role as a holiday destination and the horticulture sector also registers. Single large employers, such as GlaxoSmithKline in Worthing and Rolls Royce in Chichester also contribute to specific employment concentrations.

Sector Focus – Knowledge Economy

Knowledge Economy (KE) – Key Points

- There are 1,920 (10.4%) KE businesses employing around 11,000 (6.3%) people in Coastal West Sussex.
- Worthing (13.2%) has the highest proportion of KE businesses, but Adur (8.3%) has the highest proportion of KE employees.
- KE businesses tend to be smaller than other businesses.
- From a business and employment perspective, Coastal West Sussex has concentrations in Aerospace & Transport, Computing & Advanced Electronics and Medical Devices. There is also an employment concentration in Pharma-Biotech
- There was only a modest increase in the number of KE businesses between 2018 and 2020, but there were notable increases in employment in Creative Content and Aerospace & Transport.

Businesses

According to OECD, the term “knowledge economy” is used to describe “*trends in advanced economies towards greater dependence on knowledge, information and high skill levels*”. The knowledge economy is therefore very important for productivity and is a key driver of growth in modern economies.

In 2021, Coastal West Sussex had 1,920 (10.4%) knowledge economy businesses. This is a lower percentage than in West Sussex (11.3%), the South East (13.1%) and England (11.0%).

Table 11: Knowledge Economy Businesses (2021)

	Count	Percent	Share of West Sussex	LQ (England)
Aerospace and Transport	65	0.4%	65.0%	1.6
Communications	45	0.2%	50.0%	1.0
Computing & Advanced Electronics	40	0.2%	53.3%	1.8
Creative Content	200	1.1%	54.8%	1.0
High Tech Finance	60	0.3%	41.4%	0.6
IT Services	755	4.1%	40.9%	0.9
Medical Devices	90	0.5%	51.4%	1.5
Other Technical Consultancy	445	2.4%	49.2%	1.1
Pharma Biotech	5	0.0%	25.0%	0.4
Software	215	1.2%	44.8%	0.8
ALL KNOWLEDGE BUSINESSES	1,920	10.4%	45.7%	0.9

UK Business Counts ONS via NOMISWEB (2021)

'IT Services' (775), 'Other Technical Consultancy (445), Software (215), Creative Content (200) account for 84% of all knowledge economy businesses in Coastal West Sussex. However, the business concentrations are in Aerospace & Transport (LQ 1.6); Computing & Advanced Electronics (LQ 1.8); Medical Devices (LQ 1.5). But the number of businesses in these subsectors is much smaller.

Worthing (13.2%) has the highest proportion of knowledge businesses, followed by Adur (10.9%), Chichester (9.4%) and Arun (9.2%).

Concentrations of knowledge economy businesses differ by district/borough:

- **Adur:** Aerospace & Transport (LQ 2.0); Communications (LQ 1.8); Computing & Advanced Electronics (LQ 5.3); Medical Devices (LQ 1.3)

- **Arun:** Aerospace & Transport (LQ 2.0); Medical Devices (LQ 1.3)
- **Chichester:** Aerospace & Transport (LQ 1.7); Communications (LQ 1.3); Computing & Advanced Electronics (LQ 1.2); Medical Devices (LQ 1.6)
- **Worthing:** Creative Content (LQ 1.7); IT Services (LQ 1.2); Other Technical Consultancy (LQ 1.2); Medical Devices (LQ 1.6); Software (LQ 1.3)

In 2021 there were only five more knowledge economy businesses in Coastal West Sussex than there had been in 2018. However, in other areas, the number of these businesses fell over the period by -2.4% in West Sussex, -2.9% in the South East and by 1.8% in England. This may suggest some degree of local resilience, compared with wider trends. As with several other indicators, the resilience seems to stem from Worthing. The number of knowledge economy businesses increased by 4.1% over the period and increased by 17.2% between 2015 and 2021.

There is evidence of catch up in the knowledge economy businesses in Coastal West Sussex and it has a number of specialisms, particularly in Aerospace & Transport, Advanced Electronics, Medical Devices and, in the case of Worthing, Creative Content.

Employment

There are around 11,000 (6.3%) employees working in Knowledge Economy businesses in Coastal West Sussex. This is a lower proportion than in West Sussex (7.1%), the South East (9.2%) and England (7.2%).

Table 12: Knowledge Economy Businesses (2020)

	number	Percent	Share of West Sussex	LQ (England)
Aerospace and Transport	3,000	1.7%	75.0%	1.5
Communications	800	0.5%	45.7%	0.8
Computing & Advanced Electronics	600	0.3%	48.0%	1.5
"Creative Content"	600	0.3%	60.0%	0.8
"High Tech Finance"	100	0.1%	10.0%	0.3
"IT Services"	2,000	1.1%	33.3%	0.5
Medical Devices	1,500	0.9%	21.4%	1.3
Other Technical Consultancy	900	0.5%	36.0%	0.6
Pharma Biotech	900	0.5%	90.0%	2.5
Software	700	0.4%	28.0%	0.5
All KE Employees	11,000	6.3%	40.7%	0.9

Business Register & Employment Survey (BRES) ONS via NOMISWEB (2020)

40.7% of West Sussex's Knowledge Economy employees work in Coastal West Sussex, compared with 45.7% of its Knowledge Economy businesses.

Adur (8.3%) has the highest proportion of people working in Knowledge Economy businesses. This is followed by Worthing (7.4%), Chichester (6.7%) and Arun (4.3%).

The lower proportion of employees compared with businesses demonstrates that, on average, Knowledge Economy businesses tend to be smaller than other businesses.

Aerospace & Transport (3,000), IT Services (2,000) and Medical Devices (1,500) account for 59% of all people working in Knowledge Economy Businesses.

However, the main concentrations are in Pharma-Biotech (LQ 2.5), Aerospace & Transport (LQ 1.5), Computing & Advanced Electronics (LQ 1.5) and Medical Devices (LQ 1.3).

Knowledge Economy employment specialisms for each of the Districts/Boroughs are:

- **Adur:** Communications (LQ 4.8); Computing & Advanced Electronics (LQ 2.5); Medical Devices (LQ 2.0)
- **Arun:** Computing & Advanced Electronics (LQ 1.5)
- **Chichester:** Aerospace & Transport (LQ 3.0)
- **Worthing:** Computing & Advanced Electronics (LQ 4.0); Creative Content (LQ1.3); Medical Devices (LQ2.1); Pharma-Biotech (LQ 9.5).

Between 2018 and 2020, the number of people employed in Knowledge Businesses increased by 1,000 (+10.0%). This is a slightly slower rate of increase than in West Sussex (+11.5%), but a faster rate than in the South East (+4.1%) and England (+8.6%)

Aerospace & Transport (+1,250) and Creative Content (+450) have seen the most significant employment growth, whilst in several of the subsectors, there has been a reduction in the number of employees. These include 'Other Technical Consultancy' (-350), Pharma-Biotech (-350) and 'Computing & Advanced Electronics' (-300).

All the employment growth has been in Chichester (+1,000) and Worthing (+500).

Sector Focus – Advanced Manufacturing & Engineering (AME)

AME – Key Points

- There are 815 (4.4%) AME businesses in Coastal West Sussex employing 8,000 (4.6%) This is 20 fewer than there were in 2018.
- Adur has the largest proportion of AME businesses (5.8%) and employees (7.1%)
- The number of AME employees remained the same between 2018 and 2020, but declined by (-5.0% in West Sussex, -3.8% in the South East and -0.9% in England

Manufacturing and particularly engineering, have historically played an important role in Coastal West Sussex. Before the early part of the 20th century some of the first aircraft were made in Shoreham. Advanced Manufacturing and Engineering (AME) is the technology-intensive part of the sector and is a key driver of productivity growth.

Businesses

There are 815 (4.4%) AME businesses in Coastal West Sussex. This is the same percentage as West Sussex, but slightly higher than the South East (4.2%) and England (4.2%).

Table 13: Advanced Manufacturing & Engineering Businesses (2021)

	Count	Percent	Share of West Sussex	LQ (England)
Adur	135	5.8%	8.2%	1.5
Arun	265	4.8%	16.1%	1.2
Chichester	280	4.2%	17.0%	1.1
Worthing	135	3.5%	8.2%	0.9
Coastal West Sussex	815	4.4%	49.5%	1.1
West Sussex	1,645	4.4%	100.0%	1.1
South East	17,635	4.2%		1.1
England	94,555	3.9%		1.0

Source: UK Business Counts 2021; ONS via NOMISWEB

Adur (5.8%) has the highest proportion of AME businesses, followed by Arun (4.8%), Chichester (4.2%) and Worthing (3.9%).

Between 2018 and 2021, the number of AME businesses decreased by 20 (-2.4%). This was a smaller decrease than in West Sussex (-3.2%), the South East (-4.0%) and England (-4.1%). All the decrease occurred in Worthing (-25) and Adur saw a small increase (+5).

Employment

In 2020, around 8,000 people were employed in AME jobs or 4.6% of all employees in Coastal West Sussex. This is a lower proportion than in West Sussex (5.0%), but a higher proportion than in the South East (4.3%) and England (4.3%). 42.1% of West Sussex AME employees work in Coastal West Sussex.

Table 14: Advanced Manufacturing & Engineering Employees (2020)

	Count	Percent	Share of West Sussex	LQ (England)
Adur	1,500	7.1%	7.9%	1.7
Arun	1,750	3.7%	9.2%	0.9
Chichester	3,000	5.0%	15.8%	1.2
Worthing	2,250	4.8%	11.8%	1.1
Coastal West Sussex	8,000	4.6%	42.1%	1.1
West Sussex	19,000	5.0%	100.0%	1.2
South East	177,000	4.3%		1.0
England	1,111,000	4.3%		1.0

Source: Business Register & Employment Survey (BRES); ONS via NOMISWEB; 2020

Adur (7.1%) has the highest proportion of AME employees, followed by Chichester (5.0%), Worthing (4.8%) and Arun (3.7%).

Between 2018 and 2000 there was no change in the number of AME employees. This compares with modest reductions in West Sussex (-5.0%), the South East (-3.8%) and England (-0.9%).

Sector Focus – Creative, Digital and IT

Creative, Digital & IT (CDIT) – Key Points

- There are 1,567 (8.3%) CDIT businesses in Coastal West Sussex employing 7,000 (4.0%) people.
- Worthing (10.8%) has the largest proportion of CDIT businesses and Adur (7.2%) has the largest proportion of CDIT employees
- Between 2018 and 2021 there was a modest (-1.1%) reduction in the number of CDIT businesses, whilst the number of CDT employees remained unchanged.

Creative Digital and IT (CDIT)² sector has been an important focus for economic development in parts of the sub-region, particularly around Brighton & Hove.

There is evidence of this spreading out along Coastal West Sussex, which is being developed as the Creative Coast. In this analysis, we have used the Technation definition, the same as was used for the previous profile³.

Businesses

In 2021, there were 1,445 (7.8%) CDIT businesses in Coastal West Sussex. This is lower share than in West Sussex (8.7%), the South East (10.6%) and England (8.5%). Coastal West Sussex has 44.4% of the CDIT businesses in West Sussex.

Table 15: Creative, Digital & IT Businesses (2021)

	Count	Percent	Share of West Sussex	LQ (England)
Adur	205	8.8%	6.3%	1.0
Arun	375	6.7%	11.5%	0.8
Chichester	450	6.7%	13.8%	0.8
Worthing	415	10.8%	12.7%	1.3
Coastal West Sussex	1,445	7.8%	44.4%	0.9
West Sussex	3,255	8.7%	100.0%	1.0
South East	44,550	10.6%		1.2
England	204,885	8.5%		1.0

Source: UK Business Counts 2021; ONS via NOMISWEB

Worthing has the highest proportion of CDIT businesses (10.8%), followed by Adur (8.8%), Arun (6.7%) and Chichester (6.7%).

Between 2018 and 2021, there was a reduction of 18 (-1.1%) CDIT businesses. This is smaller reduction than in West Sussex (-5.4%), the South East (-4.1%) and England (-1.5%).

Employment

There were around 7,000 (4.0%) employees in the CDIT sector in Coastal West Sussex in 2020. This is a lower percentage than in West Sussex (5.3%), the South East (7.1%) and England (5.2%). Just over a third (35.0%) of all West Sussex's CDIT employees work in Coastal West Sussex.

Table 16: Number of CDIT Employees (2020)

	Count	Percent	Share of West Sussex	LQ (England)
Adur	1,500	7.2%	7.5%	1.4
Arun	1,500	3.2%	7.5%	0.6
Chichester	1,750	2.9%	8.8%	0.5
Worthing	2,250	4.8%	11.3%	0.9
Coastal West Sussex	7,000	4.0%	35.0%	0.8
West Sussex	20,000	5.3%	100.0%	1.0
South East	291,000	7.1%		1.4
England	1,349,000	5.2%		1.0

Source: Business Register & Employment Survey (2020); ONS Via NOMISWEB

Adur (7.2%) has the highest proportion of CDIT employees, followed by Worthing (4.8%), Arun (3.2%) and Chichester (2.9%).

Between 2018 and 2020, the number of CDIT employees has remained unchanged. This is the same situation for West Sussex. However, there was an increase of 5.8% in the South East and 3.1% in England.

Sector Focus - The Visitor Economy

Visitor Economy – Key Points

- There are 1,865 (9.9%) businesses in tourism businesses in Coastal West Sussex employing around 20,000 (11.4%) people. Worthing (10.3%) has the highest share of tourism businesses, but Arun (12.8%) has the highest share of tourism employment.
- Tourism employment increased by 1,000 (+5.3%) between 2018 and 2021 whilst it there was no change in West Sussex, a modest reduction in the South East (-0.9%) and a larger reduction in England (-4.9%).
- Pre-pandemic Coastal West Sussex welcomed an average of 12.1 million visitors per year, spending an average of £497.21 million annually.
- Chichester and Arun account for around 80% of all visitors and around 90% of all visitors spend.
- Higher spending business visitors account for only a very small proportion (4.2%) of visitors nights
- Arun performs strongly as a visitor economy in terms of spending by day visitors and staying visitors, by contrast, visitor spending in Worthing is low.

Tourism and hospitality is an important contributor to the Coastal West Sussex economy, but was one of the sectors that was most at risk during the Covid-19 pandemic. Alongside this, the lockdown restrictions encouraged more people to stay local, whilst the

introduction of travel restrictions following Brexit may also result in a greater focus on the domestic market.

Businesses

In 2021 there were 1,865 (9.9%) tourism businesses in Coastal West Sussex. This is 9.9% of all the area's businesses - a higher proportion than in West Sussex (9.1%) and the South East (9.0%), but a lower proportion than in England (10.1%).

Over half (54.9%) of West Sussex's tourism businesses are in Coastal West Sussex.

Table 17: Number of Tourism Businesses (2021)

	Count	Percent	Share of West Sussex	LQ (England)
Adur	215	9.2%	6.3%	0.9
Arun	575	10.3%	16.9%	1.0
Chichester	670	10.0%	19.7%	1.0
Worthing	405	10.5%	11.9%	1.0
Coastal West Sussex	1,865	9.9%	54.9%	1.0
West Sussex	3,395	9.1%	100.0%	0.9
South East	37,935	9.0%		0.9
England	243,045	10.1%		1.0

Source: UK Business Counts 2021; ONS via NOMISWEB

Tourism businesses are distributed quite proportionately across each of Coastal West Sussex's Districts & Borough. Worthing (10.5%) has the highest concentration of tourism businesses, followed by Arun (10.3%), Chichester (10.0%) and Adur (9.2%).

There were 115 (+6.6%) more tourism businesses in 2021 than there had been in 2018. This is the same percentage increase as in West Sussex (+6.6%), but a higher increase than in the South East (+5.6%) and England (-1.7%), which saw a reduction in tourism businesses over the period.

Employment

In 2020 there were around 20,000 (11.4%) people employed in Coastal West Sussex’s visitor economy. This is a lower proportion than in West Sussex (12.6%), but a higher percentage than in the South East (10.2%) and England (9.7%).

Table 18: Number of Tourism Employees (2020)

	Count	Percent	Share of West Sussex	LQ (England)
Adur	2,250	10.7%	4.7%	1.1
Arun	6,000	12.8%	12.5%	1.3
Chichester	7,000	11.7%	14.6%	1.2
Worthing	4,000	8.5%	8.3%	0.9
Coastal West Sussex	20,000	11.4%	41.7%	1.2
West Sussex	48,000	12.6%	100.0%	1.3
South East	419,000	10.2%		1.3
England	2,511,000	9.7%		1.0

Source: Business Register & Employment Survey 2020) ONS, via NOMISWEB

Arun (12.8%) has the highest share of tourism employment, followed by Chichester (11.7%), Adur (10.7%) and Worthing (8.5%).

In 2020, there were 1,000 (+5.3%) more people employed in the sector locally than in 2018. This compares with no change across West Sussex as a whole, a reduction of -0.7% in the South East and a reduction of -4.9% in England.

There is good evidence to suggest that the Coastal West Sussex economy has been resilient in the face of significant external shocks. It may have benefited more than many areas from domestic tourism resulting from the pandemic. Its challenge will be how to maintain and strengthen its position as travel preferences revert to pre-Covid patterns.

Value of the Visitor Economy

The latest data that is comparable data that is available at local authority level is for the 2017-2019 period. Visit England’s 2020 fieldwork was interrupted due to the Covid-19 pandemic. Visitor spend data, therefore, does not capture the impact that lockdowns have had on the visitor economy.

Between 2017-2019 Coastal West Sussex welcomed an average of 12.10 million visitors per year. This is 54.6% of all visitors to West Sussex. The annual average visitor spend was £497.21 million, 53.3% of the spend by visitors to West Sussex.

Day Visitors

11.13 million of the annual visitors were day visitors. This is 52.9% of West Sussex’s day visitors. They spent, on average £330.21 million each year - 50.5% of the visitor spend in West Sussex.

Table 19: Three Year Average Day Visitor & Spend (2017-2019)

	Total Visits (million)	Share of West Sussex (%)	Total Spend (£m)	Share of West Sussex (%)	Average Spend per Day
Adur	0.37	1.8%	£9.12	1.4%	£24.71
Arun	3.89	18.5%	£144.69	22.1%	£37.20
Chichester	4.89	23.2%	£140.56	21.5%	£28.76
Worthing	1.99	9.4%	£35.84	5.5%	£18.04
Coastal West Sussex	11.13	52.9%	£330.21	50.5%	£29.66
West Sussex	21.06	100.0%	£653.99	100.0%	£31.05
South East	253.91		£8,851.75		£34.86
England	1492.16		£50,326.29		£33.73

Source: VEResearch; VisitEngland 2017-2019

Chichester attracted the most day visitors (4.89 million), followed by Arun (2.89 million).

Average day visitor spend in Coastal West Sussex (£29.66) is below that in West Sussex (£31.05), the South East (£34.86) and England (£33.73). Arun had the highest average day visitor spend (£37.20) and Worthing had the lowest (£18.04).

Staying Visitors

The remaining 0.97 million visitors stayed overnight. This is 59.5% of the county’s staying visitors.

Overnight visits account for 8.0% of all visitor trips to Coastal West Sussex. This is high in comparison with West Sussex (7.2%), the South East (7.1%) and England (6.2%). This is entirely due to the popularity of Chichester and Arun as overnight visitor destinations, reflecting their status as a tourist destinations.

Table 20: Three Year Average Staying Visitor & Spend (2017-2019)

	Total Trips	Share of West Sussex	Nights per Trip	Total Spend (£m)	Share of West Sussex	Spend per Trip
Adur	0.02	1.5	2.63	£3.3	1.3	£136.99
Arun	0.38	23.3	2.96	£84.7	32.9	£223.99
Chichester	0.43	26.6	2.60	£66.7	25.9	£154.44
Worthing	0.13	8.1	2.16	£12.3	4.8	£93.91
Coastal West Sussex	0.97	59.5	2.68	£167.0	65.0	£173.00
West Sussex	1.62	100.0	2.46	£257.0	100.00	£158.38
South East	19.37		2.68	£3,186.7		£164.48
England	99.17		2.88	£18,494.7		£186.50

Source: VEResearch; VisitEngland 2017-2019

Staying visitors stay an average of 2.68 nights per trip – longer than in West Sussex (2.46), the same as in the South East (2.68), but below the average length of trip in England (2.88). They spent £167 million – 65.0% of the overnight visitor spend in West Sussex

Arun (23.3%) and Chichester (26.6%) account for almost 50% of visitors to West Sussex and 59% of visitor spend (32.9% and 25.9% respectively). Worthing appears to underperform as a visitor destination, accounting for just 8.1% of Coastal West Sussex’s visitors and 4.8% of its visitor spend

Staying visitors spend an average of £173.00 per trip. This is more than in West Sussex (£158.38) and the South East (£164.48), but less than in England (£186.50),

Spend per night by business visitors (£101.23) is much higher than spend per night by holiday visitors (£72.14). However business visitors account for only 4.2% of visitor nights, compared with 9.4% in West Sussex, 12.7% in the South East and 10.5% in England.

Arun, in particular, has a strong visitor economy: Spend per day visit (£37.20), spend per night (£75.64) and nights per trip (2.96) are all higher than in other parts of the Coastal West Sussex area. They are also all higher than in West Sussex, the South East and England. Visitor spending in Worthing, by contrast, is well below local, regional and national levels by all these measures.

Although this analysis does not show the impact of Covid-19, but other metrics seem to suggest that Coastal West Sussex’s visitor economy has shown signs of resilience. The western part of the area (Arun and Chichester) are strong visitor economy performers, but the eastern part is not. Coastal West Sussex is clearly not yet a business visitor destination.

However, this assessment seems to suggest that Worthing, in particular, is showing signs of some economic dynamism across a broader range of sectors. There may be opportunities to capitalise on this and start to build a more robust visitor economy than it currently has.

ECONOMY

Economic Growth

Economic Growth – Key Points

- The Coastal West Sussex economy is worth £10.45 billion. Between 2018 and 2020 it grew by £487 million (+4.9%) in nominal terms, but it shrank by -£254 million in real terms
- Overall, it performed strongly compared with West Sussex and England, but its growth rate was marginally below that of the South East region
- Worthing’s economy grew by 8.9% in nominal terms and by 1.4% in real terms, making it one of the most resilient local economies in the South East region
- Owner Occupiers’ Imputed Rental is the biggest contributing sub-sector to the Coastal West Sussex economy, followed by Manufacture of Wood, Petroleum, Chemicals & Minerals (almost all in Worthing), but public services like Education, Health and Social Care are also major contributors.
- Several sectors lost value between 2018 and 2020, with Accommodation & Food Service losing the most value
- Some sectors, such as Human Health and Residential Care grew in value between 2018 and 2020.

In 2020, the Coastal West Sussex economy was worth £10.45 billion. This is 45.7% of the West Sussex economy and 3.8% of the South East regional economy.

Table 21: Value of the Economy - GVA (2020)

	GVA (£m)	Share of West Sussex (%)
Adur	£1,144	5.0%
Arun	£2,335	10.2%
Chichester	£3,285	14.4%
Worthing	£3,683	16.1%
Coastal West Sussex	£10,447	45.7%
West Sussex	£22,837	100.0%
South East	£277,260	
England	£1,682,752	

Source: Regional gross value added (balanced) by industry: local authorities by International Territorial Level (ITL) 1 region: TLJ South East; ONS

Worthing is the main economic contributor to Coastal West Sussex, with a GVA of £3.68 billion, followed by Chichester (£3.26 billion), Arun (£2.34 billion) and Adur (£1.14 billion).

Between 2018 and 2020 the Coastal West Sussex economy grew by £487 million (+4.9%), based on current prices. It 'grew' at a faster rate than West Sussex (+3.8%) and England (+0.8%), but at a slower rate than the South East region (+5.1%).

Table 22: GVA Growth (2018-2020)

	Change 2018-2020 (Current Prices)		Change 2018-2020 (Constant Prices)		South East Rank (n=67)
	£m	Percent	£m	Percent	
Adur	-£12	-1.0%	-£98	-8.5%	57
Arun	£100	4.5%	-£66	-3.0%	32
Chichester	£99	3.1%	-£138	-4.3%	39
Worthing	£300	8.9%	£48	1.4%	17
Coastal West Sussex	£487	4.9%	-£254	-2.6%	
West Sussex	£831	3.8%	-£807	-3.7%	
South East	13545	5.1%	-£6,085	-2.3%	
England	13202	0.8%	-£111,074	-6.7%	

Source: Regional gross value added (balanced) by industry: local authorities by International Territorial Level (ITL) 1 region: TLJ South East; ONS

The picture is very different when 'growth' is shown in constant prices (2020). In real terms, the economy lost £254 million (-2.6%) between 2018 and 2020, but still performed better than West Sussex as a whole (-3.7%) and England (-6.7%) and similar to the South East region (-3.7%).

Worthing was the strongest performing district/borough with an 8.9% increase based on current prices and a 1.4% increase in real terms. It was one of the strongest performing economies in the South East region, ranked 17th out of 67 districts/boroughs.

Whilst Arun (+4.5%) and Chichester (+3.1%) both saw their economies growth in current prices, in real terms, the economies contracted by -3.0% and -4.3% respectively. Adur was the weakest performing economy, contracting by -1.0% in current prices and by -8.5% in real terms.

Economic Drivers

From a sub-sector perspective, the biggest contributor to the Coastal West Sussex economy is Owner Occupier's Imputed Rental, which accounts for 16.5% of the value of the economy, including 25.9% of Arun's economy, 20.5% of Adur's economy, 17.3% of Chichester's economy, 9.7% of Worthing's economy. It is debatable as to whether this reflects the productive economy and questionable as to how it should be considered in terms of local economic performance.

Table 23: Main Economic Sectors (2020)

Sector	GVA £m	Percent
Owner-occupiers' imputed rental	£1,722	16.5%
Manufacture of wood, petroleum, chemicals and minerals	£1,426	13.7%
Human health and social work activities	£1,237	11.9%
Wholesale and retail trade; repair of motor vehicles	£881	8.5%
Manufacture of metals, electrical products and machinery	£608	5.8%
Retail trade	£586	5.6%
Education	£573	5.5%
Real estate activities, excluding imputed rental	£557	5.3%
Public administration and defence	£530	5.1%

Source: Regional gross value added (balanced) by industry: local authorities by International Territorial Level (ITL) 1 region: TLJ South East; ONS

Owner Occupier's Imputed Rental is defined by the Office for National Statistics as "an estimate of the housing services consumed by households who are not actually renting their residence". It accounts for more than a quarter (25.9%) of the value of Arun's economy, a fifth (20.5%) of Adur's economy.

Other important subsectors are Manufacture of Wood, Petroleum, Chemicals & Minerals (13.7%), Human Health & Residential Care (11.9%), Manufacture of Metals, Electrical Products & Machinery (5.8%), Retail (5.6%), Education (5.5%), Other Real Estate (5.3%) and Public Administration & Defence (5.1%).

The districts and boroughs have different economic strengths. Other than Owner Occupiers' Imputed Rental, these are shown below:

- **Adur:** Retail (8.0%), Education (7.6%), Construction (7.0%), Information & Communications (5.5%); and Human Health & Social Work (5.7%)
- **Arun:** Retail (8.8%); Education (6.1%); Human Health & Residential Care (5.8%); Construction (5.5%)
- **Chichester:** Other Real Estate (10.5%); Manufacture of Metals, Electrical Products & Machinery (9.6%); Human Health & Residential Care (7.4%); Public Administration & Defence (7.2%); Education (7.0%); Construction (5.2%); Retail (5.0%)
- **Worthing:** Manufacture of Wood Petroleum, Chemicals & Minerals (33.5%); Human Health & Residential Care (16.4%).

Between 2018 and 2020, some sectors lost value and others grew.

Table 24: Change in GVA by Sector (2018-2020)

Winners	Losers
Human Health & Residential Care (+£103m)	Accommodation & Food Service (-£130m)
Other Real Estate (+£43m)	Education (-£108m)
Information & Communication (+£37m)	Manufacture of Wood Petroleum, Chemicals & Minerals (-£81m)
	Manufacture of Metals, Electrical Products & Machinery (-£70m)
	Arts, Entertainment & Leisure (-£65m)
	Architectural & Engineering Activities (-£63m)

Source: Regional gross value added (balanced) by industry: local authorities by International Territorial Level (ITL) 1 region: TLJ South East; ONS

Across Coastal West Sussex, the biggest losers were Accommodation & Food Service (-£130m); Education (-£108m); Manufacture of Wood Petroleum, Chemicals & Minerals (-£81m); Transport & Storage (-£74m); Manufacture of Metals, Electrical Products & Machinery (-£70m); Arts, Entertainment & Leisure (-£65m); and Architectural & Engineering Activities (-£63m).

The value of some sectors grew over the period: The most significant gainers were: Human Health & Residential Care (+£103m); Other Real Estate (+£43m); Information & Communication (+£37m).

The patterns of 'winners' and 'losers' for the districts and boroughs is shown below:

Table 25: Change in GVA by Sector by District/Borough (2018-2020)

Winners	Losers
Adur	
Other Real Estate (+£40m)	Professional, Scientific & Technical (-£54m)
	Architecture & Engineering (-£53m)
	Construction (-£18m)
	Arts, Entertainment & Recreation (-£13m)

Arun	
Information & Communication (+£12m)	Accommodation and food service (-£64m)
Agriculture, mining, electricity, gas, water and waste (+£11m)	Manufacture of metals, electrical products and machinery (-£39m)
	Education (-£33m)
	Construction (-£30m);
	Transportation and storage (-£29m)
	Land, water and air transport (-£26m)
	Arts, entertainment and recreation (-£19m)
Chichester	
Information & Communications (+£16m)	Manufacture of metals, electrical products and machinery (-£85m)
	Accommodation and food service activities (-£49m);
	Education (-£46m);
	Arts, entertainment and recreation (-£28m);
	Human health and residential care activities (-£27m);
	Public administration and defence (-£23m);
	Land, water and air transport (-£20m);
	Administrative and support service activities (-£19m);
	Employment activities, tourism and security services (-£17m);
	Wholesale Trade (-£14m).
	Worthing
Human Health & Residential Care (+£144m)	Manufacture of Wood, Petroleum, Chemicals, & Minerals (-£80m);
Manufacture of metals, electrical products and machinery (+£52m)	Agriculture, mining, electricity, gas, water and waste (-£42m);
Financial & Insurance Services (+£25m);	Administrative and support services (-£20m);
Other Real Estate (+£13m)	Employment activities, tourism and security services (-£21m);
	Education (-£19m);
	Warehouse, Transport, Postal & Couriers (-£20m);
	Construction (-£14m);
	Accommodation & Food Service (-£12m)

Source: Regional gross value added (balanced) by industry: local authorities by International Territorial Level (ITL) 1 region: TLJ South East; ONS

Unsurprisingly, there were many more sectors that lost value than gained value between 2018 and 2020. Worthing had the broadest range of resilient sectors, whilst Chichester had the widest range of sectors that lost value.

Productivity

Productivity – Key Points

- The structure of a local economy has a major influence on its productivity: some sectors produce high GVA per hour or job filled and some produce low GVA per job filled.
- However lower value sectors often provide a large number of jobs, whilst high value sectors may not necessarily do so.
- GVA per hour worked is £36.92 in Coastal West Sussex. This is similar to the rest of West Sussex, but below the South East and England.
- In Worthing, GVA per hour worked (£52.05) and per job filled (£75,173) are amongst the highest in England, outside London. Productivity in other parts of Coastal West Sussex is much lower.
- Whilst productivity by both measures increased in nominal terms between 2018 and 2020, it fell in real terms, but overall productivity was more resilient in Coastal West Sussex than in the Rest of West Sussex and England and similar to the South East.

Productivity is measured in two different ways: GVA per hour worked; and GVA per job filled. These are much better ways of assessing the local productivity than GVA per head, in which the age structure of the local population distorts results. The two measures are based on what is produced in an area’s workplace and how effectively this is done.

⁷ Note: West Sussex (North East) is the NUTS3 area that covers Crawley, Horsham & Mid Sussex

At national level, output per hour was £39.58 in Q3 2021, but it ranged from £9.67 for ‘Services to Buildings & Landscape Activities to £484.84 for ‘Extraction of Crude Petroleum & Natural Gas.

Productivity is highly dependent on the structure of economies. Prominent high productivity sectors include: Water Transport (£243.22); Manufacture of Coke & Refined Petroleum Products (£207.28); Programming & Broadcasting (£166.54); Manufacture of basic pharmaceutical products and pharmaceutical preparations (£165.63); and Insurance, Re-Insurance & Pension Funding (£164.29).

Prominent low value sectors include: Security & Investigation (£13.25); Libraries, Archives, Museums & Cultural Activities (£17.33); Residential Care (£17.68); Agriculture, Forestry & Fishing (£18.02); Food & Beverage Service (£18.40); Management Consultancy (£18.71); Non-Residential Social Work (£19.25).

London is likely to have a distorting effect on many national productivity measures, particularly in relation to real estate and finance. High value sectors are often not high employment-generating sectors and many low value sectors are excellent at providing jobs. An undue focus on high productivity will not always be effective at delivering social goals. What is normally required for a healthy labour market is a mixed economy with some higher value, lower employment sectors and some lower value, higher employment sectors.

Table 26: GVA per hour worked (2018-2020)

	2018	2020	2018-2020 Change	
	Value	Value	Value Current Prices	Value Constant Prices
Adur	£31.67	£30.74	-£0.93	-£3.29
Arun	£30.09	£30.86	+£0.77	-£1.47
Chichester	£31.48	£32.29	+£0.81	-£1.53
Worthing	£47.92	£52.05	+£4.13	+£0.56
Coastal West Sussex	£35.54	£36.92	+£1.38	-£1.27
West Sussex (North East) ⁷	£34.55	£35.38	+£0.83	-£1.74
South East	£38.77	£41.04	+£2.27	-£0.62
England	£36.41	£38.29	+£1.88	-£0.83

Source: Labour Productivity Indices by Local Authority District; ONS; 2021

GVA per hour worked in Coastal West Sussex was £36.92 in 2020. This is higher than for the Rest of West Sussex (£35.38), but below the South East (£41.04) and England (£38.29).

By this measure, Worthing (£52.05) is the most productive part of the Coastal West Sussex economy. It is the 16th most productive local economy in England and the 12th most productive outside London. Productivity in Worthing has improved significantly and consistently since 2015.

Productivity per hour worked in the other Districts and Boroughs is much lower: £32.29 in Chichester; £30.86 in Arun; and £30.74 in Adur.

Between 2018 and 2020, GVA per hour in Coastal West Sussex increased by +3.9% in nominal terms. This is a much smaller increase than between 2015 and 2018 (+16.4%) and it may well be the impact of the Covid-19 pandemic. The increase in productivity was larger than in the Rest of West Sussex (+2.4%), but smaller than in the South East (+5.9%) and England (+5.2%).

In real terms, productivity performance is much less impressive. Indeed, by this measure, there was a real terms fall in GVA per hour of -3.6%, compared with -5.0% in the Rest of West Sussex; -1.6% in the South East and -2.3% in England.

Productivity in Worthing was the most resilient, increasing by 8.6% in nominal terms and 1.2% in real terms. Whilst this seems modest, it is impressive by regional and national standards.

In all other Districts & Boroughs, GVA per hour fell in real terms: In Adur by 10.4%; and in Arun and Chichester by 4.9%.

Table 27: GVA per Job Filled (2018-2020)

	2018	2020	2018-2020 Change	
	Value	Value	Value (Current Prices)	Value (Constant Prices)
Adur	£48,554	£46,216	-£2,337	-£5,952
Arun	£43,757	£44,728	+£971	-£2,286
Chichester	£45,629	£46,403	+£774	-£2,622
Worthing	£72,109	£75,173	+£3,065	-£2,303
Coastal West Sussex	£52,406	£53,549	+£1,143	-£2,758
West Sussex (North East)	£55,491	£55,124	-£366	-£4,497
South East	£60,443	£61,980	+£1,538	-£2,962
England	£57,996	£58,995	+£1,000	-£3,317

Source: Labour Productivity Indices by Local Authority District; ONS; 2021

In 2020, GVA per job filled in Coastal West Sussex was £53,549. This is below the Rest of West Sussex (£55,124), the South East (£61,980) and England (£58,995).

The lower productivity per job filled compared with hour worked in Coastal West Sussex is mainly because the number of hours worked per job is lower locally than in some other parts of the country. Coastal West Sussex has strengths in sectors in which there is a high proportion of part-time work.

Nevertheless, Worthing (£75,173) remains the most productive part of Coastal West Sussex. By this

measure, Worthing is the 27th most productive local economy in England and the 18th outside London. There have been consistent productivity improvements in Worthing for over a decade.

Other parts of Coastal West Sussex are much less productive. In Adur, GVA per job filled is £46,216, in Arun it is £44,728 and in Chichester it is £46,403, These are all well below the Rest of West Sussex, the South East and England.

Between 2018 and 2020, GVA per job filled in Coastal West Sussex increased by 2.2% in nominal terms. This is a bigger increase than in the West Sussex (North East) (-0.7%) and England (+1.7%), but a smaller increase than in the South East (+2.5%).

As with GVA per hour worked, the real term change in GVA per job filled is much less impressive. In Coastal West Sussex it fell by -5.3%, compared with -8.1% in the West Sussex (North East), -4.9% in the South East and -5.7% in England.

All districts/boroughs had a real terms reduction in GVA per Job Filled: Adur by -12.3%; Arun by -5.2%, Chichester by -5.7% and Worthing by -3.2%.

Earnings

Earnings – Key Points

- Median earnings for full-time workers are low in all districts & boroughs compared with West Sussex, the South East and England. They were highest in Worthing and lowest Adur.
- Nominal earnings in Worthing and Arun increased at a much faster rate than in West Sussex, the South East and England between 2018 and 2021
- The earnings gap narrows when measured by earnings per hour for all workers narrows for Adur and Chichester, which suggests that some of the low earnings is due to the lower number of hours worked. The gap does not narrow for Worthing workers and widens for people who work in Arun.

Median earnings for full-time workers in the Coastal West Sussex Districts & Boroughs are low compared with West Sussex, the South East and England. Part of this may be to do with the structure of the economy, with large numbers of people employed in lower paying sectors of the economy.

Table 28: Median Annual Earnings - Full-Time Workers (2018-2021)

	2018	2021		2018-2021 Change
	Value (£)	Value (£)	Current Prices	Constant Prices
Adur	£25,826	£25,735	-£91	-£2,035
Arun	£23,517	£26,734	+£3,217	+£1,447
Chichester	£28,829	£28,066	-£763	-£2,933
Worthing	£25,140	£29,449	+£4,309	+£2,417
West Sussex	£28,676	£30,376	+£1,700	-£458
South East	£30,849	£32,810	+£1,961	-£361
England	£29,856	£31,480	+£1,624	-£623

Source: Annual Survey of Hours & Earnings (2018 & 2021), ONS via NOMISWEB

This reflects the lower levels of GVA per job filled and hours worked in most of the local area. There seems to be a discrepancy between the high productivity in Worthing the low level of workplace earnings. However, there is good evidence of recent strong workplace earnings growth in the Borough, which may reflect the strong economic performance shown in other indicators.

In 2021, median earnings for full-time workers were highest in Worthing (£29,449). This is £927 below median earnings for full-time workers in West Sussex; £3,361 below those in the South East; and £2,031 below the median in England.

Median annual earnings in Chichester were £28,066. This is £2,310 below median earnings for West Sussex, £4,744 below the South East median, and £3,414 below the median for England.

Median annual earnings in Arun were £26,734. This is £3,642 below median earnings for West Sussex, £6,076 below the South East median, and £4,746 below the median for England.

Median annual earnings in Adur were £25,735. This is £4,641 below median earnings for West Sussex, £7,075 below the South East median, and £5,745 below the median for England.

Between 2018 and 2021, workplace earnings in Worthing increased by £4,309 (+17.1%) in nominal terms. This is a much faster percentage increase than in West Sussex (4.8%), the South East (5.4%) and England (5.5%). Arun (+£1,447) also saw a significant increase in workplace earnings (+13.3%). Median earnings in both Adur (0.9%) and Chichester (-2.6%) fell over the period in nominal terms.

Real terms increases were more modest for Worthing (+9.6%) and Arun (+6.2%) and the real terms falls in earnings were more pronounced in Adur (-7.9%) and Chichester (-10.2%)

Earnings per hour is also a useful measure to try to understand why workplace earnings in the Districts/Boroughs are so much below the West Sussex, South East and England levels.

Table 29: Median Hourly Earnings - All Workers (2018-2021)

	2018	2021	2018-2021 Change	
	Value (£)	Value (£)	Current Prices	Constant Prices
Adur	£12.06	£12.57	+£0.51	-£0.40
Arun	£10.27	£11.54	+£1.27	+£0.50
Chichester	£12.18	£13.59	+£1.41	+£0.49
Worthing	£12.39	£13.38	+£0.99	+£0.06
West Sussex	£12.48	£13.67	+£1.19	+£0.25
South East	£13.41	£14.86	+£1.45	+£0.44
England	£12.88	£14.23	+£1.35	+£0.38

Source: Annual Survey of Hours & Earnings (2018 & 2021); ONS via NOMISWEB

There is some evidence that low workplace earnings are partly a result of fewer hours worked in Chichester – workplace hourly earnings for all workers are 95.5% of the England average, compared with 85.5% for annual earnings of full-time workers.

The earnings gap closes for Adur workers as well – from 81.8% to 88.3%. For Worthing it stays broadly the same – 93.5% for gross annual earnings for full-time workers and 94.0% for hourly earnings of all workers. For Arun, however, the reverse is the case – 84.9% of the England average for full-time workers, but 81.1% for hourly earnings for all workers.

There are a number of factors that influence earnings levels. If lower levels of annual pay do not translate so easily into lower levels of hourly pay, it seems likely that the number of hours worked is a contributory factor. The question then is whether or not this is a matter of choice.

Interestingly, hourly earnings in Worthing increased more modestly than in Arun and Chichester, despite the more impressive increase in annual earnings for full-time workers. This could suggest that earnings growth is driven more by people working longer hours, rather than being paid more per hour worked.

PEOPLE AND WELL-BEING

People and Well-Being – Key Points

- Coastal West Sussex has a resident population of 457,545. Over a third (35.5%) of these live in Arun.
- 56.6% of the resident population is of working age. This is low compared with West Sussex, the South East and England
- Between 2010 and 2020 the resident population grew by 19,469 (+6.9%). Population growth was strongest amongst post-working age residents
- There are projected to be 31,687 more residents in Coastal West Sussex in 2030 than there were in 2020, with people aged 65+ accounting for 82% of the population increase
- A low proportion of working age residents in Coastal West Sussex has Level 4+ qualifications and 13,000 working age residents hold no qualifications at all
- Coastal West Sussex is not a deprived area by England standards. Only four of its 271 Lower Super Output Areas are in the 10% most deprived local areas. These are all in Arun
- There are 7,920 unemployed residents. This is 4,770 more than there were in June 2018, before the Covid-19 pandemic.
- On average, Arun residents have the highest level of life satisfaction over a three-year period.
- Life expectancy at birth for both males and females is longer in all areas of Coastal West Sussex districts & boroughs than in England

Population Change

In 2020, Coastal West Sussex had a resident population of 457,545. This is 52.7% of the West Sussex resident population.

Arun (35.2%) has the largest share of residents, followed by Chichester (26.6%), Worthing (24.2%) and Adur (14.0%).

Table 30: Population Estimates by Age (2020)

	Count	Percent
Aged 0 to 15	77,649	17.0%
Aged 16 to 24	37,754	8.3%
Aged 25 to 49	125,137	27.3%
Aged 50 to 64	96,142	21.0%
16-64 years	259,033	56.6%
Aged 65-69	28,449	6.2%
Aged 70-74	32,396	7.1%
Aged 75-79	23,914	5.2%
Aged 80-84	17,762	3.9%
Aged 85+	18,342	4.0%
65+ Years	120,863	26.4%
All Ages	457,545	100.0%
Dependency Ratio	0.77	

Source: Population Estimates by Local Authority; ONS via NOMISWEB (2018 Base)

Coastal West Sussex has 259,033 working age (aged 16-64 years) residents. This is 51.0% of the working population of West Sussex. Coastal West Sussex (56.6%) has a lower proportion of working age residents than West Sussex (58.5%), the South East (61.1%) and England (62.3%).

Worthing (59.6%) has the highest percentage of working residents, followed by Adur (57.8%), Chichester (55.8%) and Arun (54.7%).

The low proportion of working age residents may mean that businesses have local labour supply issues. The large post-working age population (26.4%) means that services for older people, including care and related services, are likely to be an important feature of the local economy.

Between 2010 and 2020, the resident population increased by 29,682 (+6.9%). This is lower than the rate of population growth in West Sussex (+8.0%), the South East (+7.5%) and England (+7.4%).

Population growth was largest amongst post working age adults (+19.2%). There was only modest growth in the working age population (+1.4%) and this was largely concentrated in Worthing.

Table 31: Population Projections by Age (2020-2030)

	Count	Percent
Aged 0 to 15	-3,207	-4.1%
Aged 16 to 24	+6,089	16.1%
Aged 25 to 49	+218	0.2%
Aged 50 to 64	+2,615	2.7%
Aged 16 to 64	+8,922	3.4%
Aged 65-69	+9,249	32.5%
Aged 70-74	+112	0.3%
Aged 75-79	+3,556	+14.9%
Aged 80-84	+8,264	+46.5%
Aged 85+	+4,789	+26.1%
Aged 65+	+25,970	+21.5%
All ages	+31,687	+6.9%
Proportion of Increase 65+	82.0%	

Source: Population Projections, ONS Via NOMISWEB

The ageing of profile of the resident population is projected to continue. By 2030, there are expected to be 31,687 (+6.9%) more residents in Coastal West Sussex. People aged 65 will account for 25,970 (82.0%) of the increase, working age residents 8,922 (28.1%) and there is projected to be a reduction of 3,207 0-15 year olds.

Skills & Qualifications

Working age (16-64 years) residents in Coastal West Sussex, tend to be less qualified than working age residents in other parts of West Sussex, the South East region and England.

Table 32: Qualification Levels - Percent (2021)

	Level 4+	Level 3+	Level 2+	Level 1+	No Qualifications
Adur	47.6%	59.9%	75.2%	86.3%	6.2%
Arun	36.7%	57.4%	73.9%	90.5%	4.8%
Chichester	45.6%	55.1%	68.9%	91.7%	4.6%
Worthing	40.7%	60.4%	81.4%	91.2%	5.5%
Coastal West Sussex	41.6%	58.0%	74.7%	90.4%	5.1%
West Sussex	43.2%	60.6%	77.1%	90.0%	4.9%
South East	45.1%	63.7%	80.7%	90.4%	5.0%
England	43.1%	61.3%	78.2%	87.8%	6.4%

Source: Annual Population Survey (2021), ONS Via NOMISWEB

In 2021, 41.6% of working age residents held a qualification at Level 4+, compared with 43.2% in West Sussex, 45.1% in the South East and 43.1% in England.

The proportion of working age residents with Level 2+ qualifications in Coastal West Sussex (74.7%) is also lower than in West Sussex (77.1%), the South East, 80.7%) and England (78.2%). Only a small proportion (5.1%) of working age residents have no qualifications, but this still represents around 13,000 residents.

Qualifications data are taken from the Annual Population Survey. At District/Borough level it is subject to wide confidence bands. This means that proportions can fluctuate significantly from one year to the next. It is not, therefore helpful to provide data at this spatial level.

Deprivation

By England standards, Coastal West Sussex has very limited levels of deprivation. It is, generally, an affluent part of the country. However, within a more local context, there is some relative deprivation.

There are 271 Lower Level Super Output Areas (LSOAs) in Coastal West Sussex. This is 54.3% of all the LSOAs in West Sussex.

Arun has the most deprived local areas, but Adur (21.6%) has a large proportion of local areas that are within the third decile of most deprived LSOAs in England.

Table 33: Indices of Deprivation: by Decile & Percent – LSOAs (2019)

	1st	2nd	3rd	4th	5th	6th-10th
Adur	0.0%	2.4%	21.4%	7.1%	7.1%	61.9%
Arun	4.3%	6.4%	8.5%	9.6%	12.8%	58.5%
Chichester	0.0%	0.0%	4.3%	4.3%	20.0%	71.4%
Worthing	0.0%	7.7%	7.7%	7.7%	18.5%	58.5%
Coastal West Sussex	1.5%	4.4%	9.2%	7.4%	15.1%	62.4%
ENGLAND	10.0%	10.0%	10.0%	10.0%	10.0%	50.0%

Source: Indices of Multiple Deprivation (2019); Department for Housing, Levelling-Up & Communities

There are four (1.5%) LSOAs that are in the top ten most deprived local areas in England. These are all in Arun.

Just 16 (5.9%) of the 271 LSOAs are in the 20% most deprived local areas in England. Ten of these are in Arun, five are in Worthing, one is in Adur and none are in Chichester.

There are 41 (15.1%) LSOAs in the top 30% most deprived local areas in England. 18 of these are in Arun, 10 are in Adur, 10 are in Worthing and 3 are in Chichester.

There are 102 (37.6%) LSOAs are in the 50% of most deprived local areas in England and 169 (62.4%) are in the three least deprived local areas in England.

Assuming the top three deciles is a reasonable definition of deprived, Adur has the highest proportion of most deprived LSOAs (23.8%), followed by Arun (19.1%), Worthing (15.4%) and Chichester (4.3%).

Chichester (71.4%) has the highest proportion of LSOAs in the least deprived deciles (from 6-10) followed by Adur (61.9%), Arun (58.5%) and Worthing (58.5%).

Unemployment

In June 2022, there were 7,920 (3.1%) claimant count unemployed people in Coastal West Sussex. This is 56.6% of all claimant count unemployed people in West Sussex.

Table 34: Claimant Count Unemployment (June 2018-June 2022)

	June 2018		June 2022		Change June 2018- June 2022	
	Count	%	Count	%	Count	%t
Adur	490	1.3%	1,120	3.0%	630	129%
Arun	1,115	1.3%	2,805	3.2%	1,690	152%
Chichester	685	1.0%	1,900	2.8%	1,215	177%
Worthing	855	1.3%	2,100	3.2%	1,245	146%
Coastal West Sussex	3,150	1.2%	7,920	3.1%	4,770	151%
West Sussex	5,035	1.0%	13,985	2.8%	8,950	178%
South East	73,520	1.3%	164,160	2.9%	90,640	123%
England	727,930	2.1%	1,349,920	3.8%	621,990	85%

Source: Claimant Count, ONS via NOMISWEB (June 2018- June 2022)

The unemployment rate is higher than in West Sussex (2.8%) and the South East (2.9%), but lower than in England (3.8%).

Arun (3.2%) and Worthing (3.2%) have the highest unemployment rates, followed by Adur (3.0%) and Chichester (2.8%).

The number of claimant count unemployed people is still +4,770 (151%) higher than it was in June 2018, before the Covid-19 pandemic. The increase in Coastal West Sussex is not as large as in West Sussex (+178%), but it is greater than in the South East (+123%) and England (85%).

The biggest increase has been Chichester (+177%), followed by Arun (+152%), Worthing (+146%) and Adur (+129%).

In June 2020, at the height of the pandemic, the number of claimant count unemployed people reached 14,120 (5.5%). This was a higher rate than in West Sussex (5.0%) and the South East (5.1%), but lower than in England (6.2%).

Since its 2020 peak the number of claimant count unemployed people has fallen by -6,200 (-44%). This compares with falls in West Sussex of (-45%), South East (-42%), and England (-39%).

Economic conditions are forecast to be highly volatile over the next few years: interests rates and inflation are both increasing the Bank of England is predicting a sustained period of recession. This is likely to have an adverse impact on the labour market and may result in a return to higher levels of unemployment.

16-24 year olds account for 13.6% of claimant count unemployed people. This is similar to the proportion for West Sussex (13.8%), but below the proportion for the South East (15.1%) and England (15.6%).

Subjective Well-Being

The Office for National Statistics Personal Well-Being Index tracks subjective well-being by local authority using a score of 0-10. The most useful measure used is Life Satisfaction. There is no measure for Coastal West Sussex, but there is for each of the component Districts & Boroughs.

Sample sizes, however, are small at local level and the Office for National Statistics advises against ranking all Districts/Boroughs against each other for this reason.

Table 35: Life Satisfaction Scores (2018/19-2021/22)

	2018-19	2019-20	2020-21	Average
Adur	7.31	N/A	7.57	7.44
Arun	7.87	8.09	7.64	7.87
Chichester	8.1	7.54	6.61	7.42
Worthing	7.9	7.8	7.26	7.65
West Sussex	7.89	7.84	7.37	7.70
South East	7.79	7.7	7.4	7.63
England	7.71	7.66	7.38	7.58

Source: Personal Well-Being Estimates by Local Authority; ONS 2018/19-2020/21

Averaging the scores over a three-year period provides a more robust assessment of personal well-being. Arun residents (7.87) have the highest average life satisfaction score between 2018/29 and 2020/21, followed by Worthing (7.65), Adur (7.44) and Chichester (7.44).

Average life satisfaction over the three year period in West Sussex is 7.70, above all areas in Coastal West Sussex, apart from Arun.

The average for the South East is 7.63 and for England it is 7.58, both above the averages for Chichester and Adur, but below those for Arun and Worthing.

Life Expectancy

Life expectancy at birth is shown for each of the Districts/Boroughs, but not for Coastal West Sussex.

HOUSING AND ENVIRONMENT

Table 36: Male & Female Life Expectancy at Birth (Years)

	Female	Male	Female:Male Difference
Adur	83.68	81.28	+2.40
Arun	83.65	79.63	+4.02
Chichester	84.52	80.64	+3.88
Worthing	83.04	79.56	+3.48
West Sussex	84.21	80.88	+3.33
South East	84.27	80.79	+3.48
England	83.12	79.76	+3.36

Source: Life Expectancy by Age & Area 2001-2002 to 2018-2010; Office for National Statistics

Female life expectancy is highest in Chichester (84.52 years), followed by Arun (83.65 years), Adur (83.68 years) and Worthing (83.04). Apart from Worthing, these are all above the average for England (83.12 years), but, with the exception of Chichester, they are marginally below the average for the South East (84.27 years).

Male life expectancy at birth is highest in Adur (81.28 years), followed by Chichester (80.64 years), Arun (79.63 years) and Worthing (79.56 years). Life expectancy for males in Adur and Chichester is higher than for England (79.76 years). Average life expectancy in the South East (80.79 years) is higher than in all districts & boroughs in Coastal West Sussex.

The biggest difference between female and male life expectancy is in Worthing (+3.93 years) and Arun (3.69 years). These are above the difference in the South East (+3.48) and England (+3.61).

Household Growth

Housing – Key Points

- There are 211,327 households in Coastal West Sussex with an average of 2.17 residents per household.
- There are projected to be 21,409 more households by 2030. This is an increase of 10.1%.
- Average prices are lower than in West Sussex and the South East in all districts/boroughs except Chichester.
- Between 2018 and 2021 average house prices increased by 13.8% in Adur, 12.3% in Arun, 12.2% in Worthing and 9.7% in Chichester.
- Chichester is the least affordable District/Borough in the area with average house prices 14.4 times median earnings for full-time workers. Worthing is the most affordable District/Borough (11.2)
- Flats and maisonettes are more affordable for local people, but they are still between 6.5 times (Arun) and 8.4 times (Adur) median earnings.

In 2021 there were 211,327 households in Coastal West Sussex. This is 54.8% of all households in West Sussex.

More than a third (35.4%) of all households are in Arun, a quarter in Chichester (25.7%) and in Worthing (24.9%) and 14% in Adur.

There are an average of 2.17 residents per household. Average household size in Coastal West Sussex is smaller than in West Sussex (2.25), the South East (2.34) and England (2.32). Chichester has the largest average household size (2.24), followed by Arun (2.16), Adur (2.16) and then Worthing (2.11).

Table 37: Household Projections (2021-2030)

	2021	2030	2021-2030 Change	
	Count	Count	Count	Percent
Adur	29,678	32,509	+2,831	+9.5%
Arun	74,742	82,746	+8,004	+10.7%
Chichester	54,307	59,177	+4,870	+9.0%
Worthing	52,600	58,304	+5,704	+10.8%
Coastal West Sussex	211,327	232,736	+21,409	+10.1%
West Sussex	385,588	423,852	+38,264	+9.9%
South East	3,946,235	4,285,312	+339,077	+8.6%
England	24,371,273	26,290,547	+1,919,274	+7.9%

Source: Household Projections for England; ONS (2019 base)

There are projected to be 21,409 more households by 2030. This is an increase of +10.1%. The growth in household numbers is expected to be faster in Coastal West Sussex than in West Sussex (+9.9%), the South East (+8.6%) and England (+7.9%). Arun will account for the largest increase in households (+8,004), followed by Worthing (+5,704), Chichester (+4,870) and then Adur (+2,831).

Housing Affordability

Average house prices data is available for each of the Districts and Boroughs, but not for Coastal West Sussex as a whole. These show that in December 2021, house prices were highest in Chichester (£405,000), followed by Adur (£355,500), Worthing (£330,000) and Arun (£325,500).

Average house prices are lower than in West Sussex (£365,000) and the South East (£360,000) in all districts/boroughs, apart from Chichester. They are higher than in England (£280,000) in all districts/boroughs.

Table 38: Median House Prices - All Properties (2018-2021)

	Year ending Dec 2018	Year ending Dec 2021	Change 2018-2021	
	Value (£)	Value (£)	Value (£)	Percent
Adur	£312,500	£355,500	+£43,000	+13.8%
Arun	£290,000	£325,000	+£35,000	+12.1%
Chichester	£370,000	£405,000	+£35,000	+9.5%
Worthing	£295,000	£330,000	+£35,000	+11.9%
West Sussex	£325,500	£365,000	+£39,500	+12.1%
South East	£320,000	£360,000	+£40,000	+12.5%
England	£240,000	£280,000	+£40,000	+16.7%

Source: House Price Statistics for Small Areas; Office for National Statistics 2021

Between 2018 and 2021, average house prices increased fastest in Adur (+13.8%), followed by Arun (+12.3%), Worthing (+12.2%) and Chichester (+9.7%). House prices increased by 12.2% in West Sussex, 12.3% and 16.3% in England.

Table 39: Ratio of Median House Prices to Median Earnings - All Properties (2018-2021)

	2018	2021	2018-2021 Change
Adur	12.1	13.8	+1.7
Arun	12.3	12.2	-0.2
Chichester	12.8	14.4	+1.6
Worthing	11.7	11.2	-0.5
West Sussex	11.4	12.0	+0.7
South East	10.4	11.0	+0.6
England	8.0	8.9	+0.9

Source: Adapted from House Price Statistics for Small Areas; Office for National Statistics 2021 and Annual Survey of Hours & Earnings; ONS 2021 (Median Gross Earnings for Full-Time Workers)

Housing affordability is a key social and economic issue for Coastal West Sussex. It can be difficult for businesses to compete for talent with more affordable areas of the country. Chichester is the least affordable district/borough in Coastal West Sussex with average house prices 14.4 times median workplace earnings. Adur is the next least affordable (13.8), followed by Arun (12.2) and Worthing (11.2).

The house price to earnings ratio is higher than in the South East (11.0) and in England (8.9) in all districts/boroughs, and only Worthing has a lower house price to earnings ratio than West Sussex as a whole.

Between 2018 and 2021, housing has become less affordable in Adur and Chichester, but more slightly affordable in Arun and Worthing.

Flats and maisonettes, which are often first time buyer properties may be a better measure of affordability. In 2021, these properties were most expensive in Chichester (£220,000) and Worthing (£220,000), followed by Adur (£216,000) and Arun (£175,000).

Table 40: Median House Prices - All Properties (2018-2021)

	Year ending Dec 2018	Year ending Dec 2021	Change 2018-2021	
	Value (£)	Value (£)	Value (£)	PERCENT
Adur	£210,000	£216,000	+£6,000	+2.9%
Arun	£160,000	£175,000	+£15,000	+9.4%
Chichester	£224,000	£220,000	-£4,000	-1.8%
Worthing	£197,000	£220,000	+£23,000	+11.7%
West Sussex	£210,000	£213,000	+£3,000	+1.4%
South East	£212,995	£217,000	+£4,005	+1.9%
England	£217,500	£235,000	+£17,500	+8.0%

Source: House Price Statistics for Small Areas; Office for National Statistics 2021

Flats/maisonettes are cheaper than in England (£235,000) in all districts/boroughs, but more expensive than in the South East (£217,000) in Chichester and Worthing. Average prices for flats and maisonettes in West Sussex are £213,000, higher only than in Arun.

Between 2018 and 2021, the cost of flats/maisonettes has not increased as fast as the cost of houses, apart from in Worthing. In Adur they increased by +2.9%, in Arun they increased by +9.4% and in Chichester they fell by -1.8%. This compares with +1.4% in West Sussex, +1.9% in the South East and +8.0% in England.

Table 41: Ratio of Median House Prices to Median Earnings - Flats & Maisonettes (2018-2021)

	2018	2021	2018-2021 Change
Adur	8.1	8.4	+0.3
Arun	6.8	6.5	-0.3
Chichester	7.8	7.8	+0.1
Worthing	7.8	7.5	-0.4
West Sussex	7.3	7.0	-0.3
South East	6.9	6.6	-0.3
England	7.3	7.5	+0.2

Source: Adapted from House Price Statistics for Small Areas; Office for National Statistics 2021 and Annual Survey of Hours & Earnings; ONS 2021 (Median Gross Earnings for Full-Time)

Average prices for flats & maisonettes in Adur are 8.4 times median earnings. This is the highest in the Coastal West Sussex area and higher than in West Sussex (7.0), the South East (6.6) and England (7.5). The prices of flats/maisonettes in Chichester is 7.8 times median earnings. This is higher than in Worthing (7.5) and Arun (6.5), which is the most affordable part of Coastal West Sussex.

Energy Consumption

Energy – Key Points

- In 2019 Coastal West Sussex consumed 745.8 ktoe of energy, with 7.5% of this being from biofuels and waste.
- Chichester consumes 40.8% of all the energy that is consumed in Coastal West Sussex – equating to 25.1ktoe per 10,000 residents.
- Between 2015 and 2019 increase in energy use was below the increase in the resident population and the most significant increase was in biofuels and waste.
- Coastal West Sussex has 6,161 renewable energy units, producing 1,796,500 MWh of energy per year. The Rampion Wind Farm accounts for 1,591,699 of the energy production.
- Excluding the windfarm, the most renewable energy production increased by 46.4% between 2015 and 2019, with the largest increase being in Chichester (+70.7%).
- In 2021, Coastal West Sussex had 3,080 licensed Low Emissions Vehicles, including 1,830 electric vehicles.
- Chichester has the largest number of low emissions vehicles (1,236).
- There were 14.8 times more licensed low emissions vehicles in Coastal West Sussex in 2021 than there had been in 2015.

The latest energy data (2019) shows that Coastal West Sussex consumed a total of 745.8 ktoe of energy. This

is 49.7% of all energy consumed in West Sussex. Gas (36.5%), Petroleum (36.1%) and Electricity (18.1%) accounted for most of this. Biofuels & Wastes accounted 55.8 ktoe (7.5%) of energy consumption.

Table 42: Energy Consumption – ktoe (2019)

ktCO2e	All Fuels	Bioenergy & Wastes	Gas	Electricity	Other ⁹
Adur	84.9	5.3	31.3	16.1	32.2
Arun	224.4	14.5	92.0	41.9	76.0
Chichester	304.2	29.2	87.2	49.2	138.6
Worthing	132.3	6.9	61.7	30.3	33.4
Coastal West Sussex	745.8	55.8	272.2	137.6	280.1
West Sussex	1,500.7	96.9	505.8	283.4	614.6
South East	17,562.4	1,021.7	5,476.7	3,185.7	7,878.3
England	105,136.6	5,157.7	37,143.4	19,788.5	43,047.0

Source: Sub National Total Final Energy Consumption 2005-2019; ONS; September 2021

Biofuels & Waste accounts for a higher proportion of energy use in Coastal West Sussex than in West Sussex (6.5%), the South East (5.8%) and England (4.9%).

In 2019, Chichester was the biggest user of energy in Coastal West Sussex. It consumed 40.8% of all the energy consumed in Coastal West Sussex – far more than its proportion of residents. It consumed 25.1 ktoe of energy per 10,000 residents, compared with 16.3 ktoe in Coastal West Sussex, 17.4 ktoe in West Sussex, 19.1 ktoe in the South East and 18.7 ktoe in England.

The other Districts and Boroughs consume much less energy: Arun (14.0 ktoe per 10,000 residents), Adur 13.2 ktoe and Worthing 12.5 ktoe.

⁸ Ktoe = 1,000 tonnes of oil equivalent

⁹ Other = Coal, Manufactured Fuels & Petroleum

Despite this, Chichester (138.6 ktoe - 9.6%) also has the highest proportion of energy use that is fuelled by biofuels & waste. This is higher than in West Sussex (6.5%), the South East (5.8%) and England (4.9%). Worthing (5.2%) has the lowest share of bioenergy & waste fuelled energy use, followed by Adur (6.2%) and Arun (6.5%).

Table 43: Change in Energy Consumption (%) ktoe (2015-2019)

	All Fuels	Gas	Electricity	Bioenergy & Wastes	Other
Adur	-1.5%	-0.5%	-7.1%	27.2%	-3.0%
Arun	1.4%	0.1%	-4.0%	37.6%	1.0%
Chichester	5.3%	10.3%	-3.5%	89.2%	-3.3%
Worthing	-2.1%	-1.3%	-8.8%	26.2%	-1.6%
Coastal West Sussex	2.0%	2.8%	-5.3%	57.0%	-1.9%
West Sussex	2.0%	2.4%	-2.8%	53.4%	-1.3%
South East	-0.6%	2.2%	-3.8%	29.0%	-3.9%
England	0.5%	3.0%	-4.5%	39.5%	-2.4%

Source: Sub National Total Final Energy Consumption 2005-2019; ONS; September 2021

Between 2015 and 2019, energy use in Coastal West Sussex increased by 14 ktoe (+2.0%). This is below the increase in the resident population over the period (+2.6%). Biofuels and waste consumption increased by 20 ktoe (+57%) and gas use increased by 7 ktoe. Use of all other forms of energy fell.

The increase in biofuels and waste was much higher in Chichester (+89.2%) than in other parts of Coastal West Sussex: Arun (+37.6%), Adur (+27.2%) and Worthing (+26.2%) and higher than in West Sussex (+53.4%), the South East (+29.0%) and England (+39.5%).

However, overall energy consumption rose faster in Chichester (+5.3%) than in other districts & boroughs.

Table 44: Energy Consumption per 10,000 Resident ktoe (2019)

	All Fuels	Bioenergy & Wastes	Gas	Electricity	Other
Adur	13.2	0.8	4.9	2.5	5.0
Arun	14.0	0.9	5.7	2.6	4.7
Chichester	25.1	2.4	7.2	4.1	11.4
Worthing	12.0	0.6	5.6	2.7	3.0
Coastal West Sussex	16.3	1.2	6.0	3.0	6.1
West Sussex	17.4	1.1	5.9	3.3	7.1
South East	19.1	1.1	6.0	3.5	8.6
England	18.7	0.9	6.6	3.5	7.6

Source: Sub National Total Final Energy Consumption 2005-2019; ONS; September 2021

Energy consumption for 10,000 residents is much higher in Chichester (25.0 ktoe) and in other districts & boroughs in Coastal West Sussex.

Petroleum, which is included in the 'Other' fuel category) still accounts for a high proportion of fuel use in Chichester (10.9 ktoe per 10,000 residents compared with the Coastal West Sussex (5.9 ktoe), West Sussex (6.8 ktoe), the South East (8.1 ktoe) and England (7.2 ktoe). Other districts and boroughs are much lower users of petroleum: Adur 4.9 ktoe per 10,000 residents); Arun (4.6 ktoe) and Worthing 2.9 ktoe.

Chichester also has the greatest gas use (7.2 ktoe per 10,000 households) of all the districts and boroughs, although the difference is less marked: Adur 4.9 ktoe, Arun 5.7 ktoe and Worthing 5.6 ktoe.

Coastal West Sussex uses less than its share of West Sussex energy based on its resident population, but this masks significant differences between the districts and boroughs. Chichester is a clear outlier in this respect: it has high levels of energy use and the rate of increase outstripped the rate of population increase between 2015 and 2019. This contrasts with all other districts and boroughs in Coastal West Sussex.

However, Chichester is also leading the way in shifting to biofuels and waste energy use. It seems likely that the prevalence of land-based industries and the highly rural nature of Chichester and key factors in both these issues.

Renewable Energy

In 2020, Coastal West Sussex had 6,161 renewable energy units and generated 1,796,005 of MWh of energy. The Rampion Windfarm is the single biggest generator, contributing 1,591,699 MWh of renewable energy in 2020.

Other sources contributed 204,306 MWh, 69% of which was generated through photovoltaics, which account for all but 15 of the renewable 6,161 installed renewable energy units in Coastal West Sussex.

Table 45: Photovoltaic Units (2015-2020)

	2015		2020		2015-2020 Change	
	Units (2015)	Units (2020)	Units per 1000 Households	Count	%	
Adur	657	744	27.1	87	+13.2%	
Arun	1,756	2,159	31.2	403	+22.9%	
Chichester	1,843	2,250	42.4	407	+22.1%	
Worthing	849	992	20.9	143	+16.8%	
Coastal West Sussex	5,105	6,145	31.1	1,040	+20.4%	
West Sussex	9,871	11,880	33.7	2,009	+20.4%	
South East	99,101	116,166	32.1	17,065	+17.2%	
England	654,860	762,585	34.0	107,725	+16.5%	

Source: Renewable Electricity by Local Authority 2014-2020; Department for Business, Energy & Industrial Strategy

In 2020, there were +1,040 (+20.4%) more photovoltaic units Coastal West Sussex than there had been in 2015. Chichester (+407) and Arun (+403) accounted for around 80% of the additional installations. There are 31.1 unit per 1,000 households. This is slightly below the average for West Sussex (33.7), the South East (32.1) and England (34.0). Chichester has the highest density of units (42.4 per 1,000 households) and Worthing has the lowest density (20.9).

Other significant contributors of renewable energy in Coastal West Sussex are Plant Biomass (21,789 MWh in Adur); Anaerobic Digestion (23,901 MWh, including 15,185 MWh in Arun and 8,717 MWh in Chichester);

¹⁰ Note: The renewable energy generated by the Rampion Windfarm has been excluded from all the figures

Landfill Gas (9,383 MWh in Arun) and Sewage Gas (7,185 MWh, including 4,570 MWh in Arun and 2,615 MWh in Worthing).

Table 46: Renewable Energy Generation (MWh) (2015-2020)¹⁰

	2015		2020		2015-2020 Change	
	MWh	MWh	MWh	Percent		
Adur	26,107	25,522	-585	-2.2%		
Arun	63,581	94,819	+31,238	+49.1%		
Chichester	45,082	76,961	+31,879	+70.7%		
Worthing	4,835	7,005	+2,170	+44.9%		
Coastal West Sussex	139,605	204,306	+64,702	+46.3%		
West Sussex	222,313	349,103	+126,790	+57.0%		
South East	6,908,481	8,069,820	+1,161,339	+16.8%		
England	50,329,579	61,310,371	+10,980,792	+21.8%		

Source: Renewable Electricity by Local Authority 2014-2020; Department for Business, Energy & Industrial Strategy

The Rampion Windfarm is a significant generator of renewable energy. It contributes 16% of all the renewable energy in the South East region and 2.5% of all the renewable energy in England.

If the Rampion Windfarm is excluded, renewable energy generation in Coastal West Sussex increased from 139,604 MWh in 2015 to 204,306 MWh in 2020 – an increase of 64,702 MWh (+46.3%). Chichester (+70.7%) has seen the biggest increase in renewable energy generation, followed by Arun (+49.1%) and

Worthing (+44.9%). There was a modest fall in Adur (-2.2%).

The rate of increase in renewable energy generation between 2015 and 2020 in Coastal West Sussex (46.3%) was below that of West Sussex (+57.0%), but above that in the South East (+16.8%) and England (+21.8%).

Arun (46.4%) and Chichester (37.7%) contribute nearly 85% of all renewable energy in Coastal West Sussex (excluding the Rampion Offshore Windfarm). This is despite the fact that they only account for around 62% of the resident population.

Electric Vehicles

More sustainable travel has become an important driver of reducing carbon emissions. In 2021, Coastal West Sussex had 3,080 licensed low emissions vehicles, including 1,830 electric vehicles, 1,120 hybrid plug-in vehicles and 130 vehicles run on other sustainable fuels. 45% of all licensed low emissions vehicles in West Sussex are in Coastal West Sussex.

Table 47: Low Emissions Vehicles (2018-2021)

	2018 Q4		2021 Q4		2018 (Q4) -2021 (Q4)	
	Count	Count	Per 10,000 People	Count	Percent	
Adur	99	378	59	+279	+282%	
Arun	238	901	56	+663	+279%	
Chichester	337	1,236	102	+899	+267%	
Worthing	190	565	51	+375	+197%	
Coastal West Sussex	864	3,080	67	+2,216	+256%	
West Sussex	2,023	6,814	79	+4,791	+237%	
South East	40,774	162,586	176	+121,812	+299%	
England	176,353	660,836	117	+484,483	+275%	

Source: Registered Low Emissions Vehicles by Local Authority; Department for Transport

Coastal West Sussex has 67 low emissions vehicles per 10,000 residents. This is below the number in West Sussex (79), the South East (176) and England (117).

Chichester (1,236) has the largest number of low emissions vehicles. This is the equivalent to 102 per 10,000 residents and it accounts for 40% of all low emission vehicles in Coastal West Sussex. Arun has 901 low emissions vehicles (56 per 10,000 residents); Worthing has 565 (51 per 10,000 residents); and Adur has 378 (59 per 10,000 residents).

There has been a significant increase in the number of low emissions vehicles in recent years. In 2015 there were only 223 of them and in 2018 there were just 864. The number of lower missions vehicles increased by 256% between 2018 and 2021. This is slightly above the rate of increase in West Sussex since (+237%), but slightly below those in the South East (+299%) and England (+275%).

ANNEX I: KNOWLEDGE ECONOMY SECTOR DEFINITION (SIC)

This table provides the detailed five digit SIC codes that have been used to define the knowledge economy. It is the definition that is used by the Office for National Statistics

Medical Devices
26511 Manufacture of electronic instruments & appliances for measuring, navigation, except industrial
26513 Manufacture of non-elect' instruments & appliances for measuring, testing and navigation, except industrial
26600 Manufacture of irradiation, electromedical and electrotherapeutic equipment
26701 Manufacture of optical precision instruments
32500 Manufacture of medical and dental instruments and supplies
72190 Other research and experimental development on natural sciences and engineering
74202 Other specialist photography
Pharma / Biotechnology
21100 Manufacture of basic pharmaceutical products
21200 Manufacture of pharmaceutical preparations
72110 Research and experimental development on biotechnology
IT Services
62020 Computer programming, consultancy and related activities
62030 Computer facilities management
62090 Other information technology and computed service activities
63110 Data processing, hosting and related activities
Communications
26301 Manufacture of telegraph and telephone apparatus and equipment
26309 Manufacture of communications equipment

61900 Other telecommunications activities
Computing & Advanced Electronics
26200 Manufacture of computers and peripheral equipment
26110 Manufacture of electronic components and boards
26400 Manufacture of consumer electronics
26512 Manufacture of electronic industrial process control equipment
27110 Manufacture of electric motors, generators, transformers and electricity distribution and control apparatus
27200 Manufacture of batteries and accumulators
27310 Manufacture of fibre optic cables
27900 Manufacture of other electrical equipment
28910 Manufacture of machinery for metallurgy
Other Technical Consultancy
71121 Engineering design activities for industrial process and production
71122 Engineering related scientific and technical consulting activities
71200 Technical testing and analysis
74100 Specialised design activities
74901 Environmental consulting activities
Aerospace & Transport
28110 Manufacture of engines and turbines, except aircraft, vehicle and cycle engines
28120 Manufacture of fluid power equipment
28131 Manufacture of pumps
28132 Manufacture compressors
28150 Manufacture of bearings, gears, gearing and driving elements
29100 Manufacture of motor vehicles
29201 Manufacture of bodies

29202 Manufacture of trailers and semitrailers
29310 Manufacture of electrical and electronic equipment for motor vehicles
29320 Manufacture of other parts and accessories for motor vehicles
30110 Building of ships and floating structures
30120 Building of pleasure and sporting boats
30200 Manufacture of railway locos
30300 Manufacture of air and spacecraft and related machinery
30400 Manufacture of military fighting vehicles
59111 Motion picture production activities
59112 Video production activities
59113 Television programme production activities
59120 Motion picture, video and television post production activities 59200 Sound recording and music publishing activities
18201 Reproduction of sound recording
18202 Reproduction of video recording
18203 Reproduction of computer media
58210 Publishing of computer games
58290 Other software publishing
62011 Computer programming activities
62012 Business and domestic software development
63120 Web portals
64301 Activities of investment trusts
64302 Activities of unit trusts
64303 Activities of venture and development capital companies 64304 Activities of open-ended investment companies
64305 Activities of property unit trusts
64306 Activities of real estate investment trusts

Creative Content
59111 Motion Picture production activities
59112 Video production activities
59113 Television programme production activities
59120 Motion picture, video and television post production activities
59200 Sound recording and music publishing activities
18201 Reproduction of sound recording
18202 Reproduction of video recording
18203 Reproduction of computer media
Software
58210 Publishing of computer games
58290 Other software publishing
62011 Computer programming activities
62012 Business and domestic software development
63120 Web portals
High Tech Financial Services
64301 Activities of investment trusts
64302 Activities of unit trusts
64303 Activities of venture & development capital companies
64304 Activities of open-ended investment companies
64305 Activities of property unit trusts
64306 Activities of real estate investment trusts
64921 Credit granting by non-deposit taking finance houses and other specialist consumer credit grantors
64992 Factoring
64999 Financial intermediation not elsewhere classified
65000 Pension funding

ANNEX II: ADVANCED MANUFACTURING & ENGINEERING SECTOR DEFINITION (SIC)

The table below shows the SIC codes that have been used to define the Advanced Manufacturing & Engineering sector (AME). This is the definition used by the Office for National Statistics

Advanced Manufacturing and Engineering (AME)
7112 : Engineering activities and related technical consultancy
331 : Repair of fabricated metal products, machinery and equipment
265 : Manufacture of instruments and appliances for measuring, testing and navigation; watches and clocks
282 : Manufacture of other general-purpose machinery
20 : Manufacture of chemicals and chemical products
30 : Manufacture of other transport equipment
261 : Manufacture of electronic components and boards
332 : Installation of industrial machinery and equipment
263 : Manufacture of communication equipment
271 : Manufacture of electric motors, generators, transformers and electricity distribution and control apparatus
289 : Manufacture of other special-purpose machinery
291 : Manufacture of motor vehicles
264 : Manufacture of consumer electronics
279 : Manufacture of other electrical equipment
281 : Manufacture of general purpose machinery
292 : Manufacture of bodies (coachwork) for motor vehicles; manufacture of trailers and semitrailers
262 : Manufacture of computers and peripheral equipment

266 : Manufacture of irradiation, electromedical and electrotherapeutic equipment
273 : Manufacture of wiring and wiring devices
274 : Manufacture of electric lighting equipment
284 : Manufacture of metal forming machinery and machine tools
293 : Manufacture of parts and accessories for motor vehicles
267 : Manufacture of optical instruments and photographic equipment
275 : Manufacture of domestic appliances
283 : Manufacture of agricultural and forestry machinery
21 : Manufacture of basic pharmaceutical products and pharmaceutical preparations
268 : Manufacture of magnetic and optical media
272 : Manufacture of batteries and accumulators

ANNEX III: CREATIVE, DIGITAL & IT SECTOR DEFINITION (SIC)

The following definition used by Technation has been used

Creative Digital & IT
26 : Manufacture of computer; electronic and optical products
27 : Manufacture of electrical equipment
58 : Publishing activities
59 : Motion picture; video and television programme production; sound recording and music publishing activities
60 : Programming and broadcasting activities
61 : Telecommunications
62 : Computer programming; consultancy and related activities
63 : Information service activities

ANNEX IV: TOURISM SECTOR DEFINITION (SIC)

The definition in the ONS document "Measuring Tourism" has been used

Tourism
49100: Passenger rail transport - interurban
49320: Taxi operation
49390: Other passenger land transport nec
50100: Sea & coastal passenger water transport
51101: Scheduled passenger air transport
55201: Holiday centres & villages
55202: Youth hostels
55209: Other holiday & other short stay accommodation (not including holiday centres & villages or youth hostels) nec
55300: Camping grounds, recreational vehicle parks & trailer parks
55900: Other accommodation
56101: Licensed restaurants
56102: Unlicensed restaurants & cafes
56103: Take away food shops & mobile food stands
56210: Event catering activities
56290: Other food service activities
56301: Licensed clubs
56302: Public houses & bars
68209: Letting & operating of own or leased real estate (other than Housing Association real estate & conference & exhibition services nec
77110: Transport equipment rental
77210: Renting & leasing of recreation & sports goods
77341: Renting & leasing of passenger water transport equipment

77531: Renting & leasing of passenger air transport equipment
82301: Activities of exhibition & fair organisers
82302: Activities of conference organisers
90010: Performing arts
90020: Support activities to the performing arts
90030: Artistic creation
90040: Operation of arts facilities
91020: Museum activities
91030: Operation of historic sites and buildings and similar visitor attractions
91040: Botanical gardens, zoological gardens & nature reserve activities
92000: Gambling & betting activities
93110: Operation of sports facilities
93199: Other sports activities (not including activities of racehorse owners) nec
93210: Activities of amusement parks & theme parks
93290: Other amusement & recreation activities