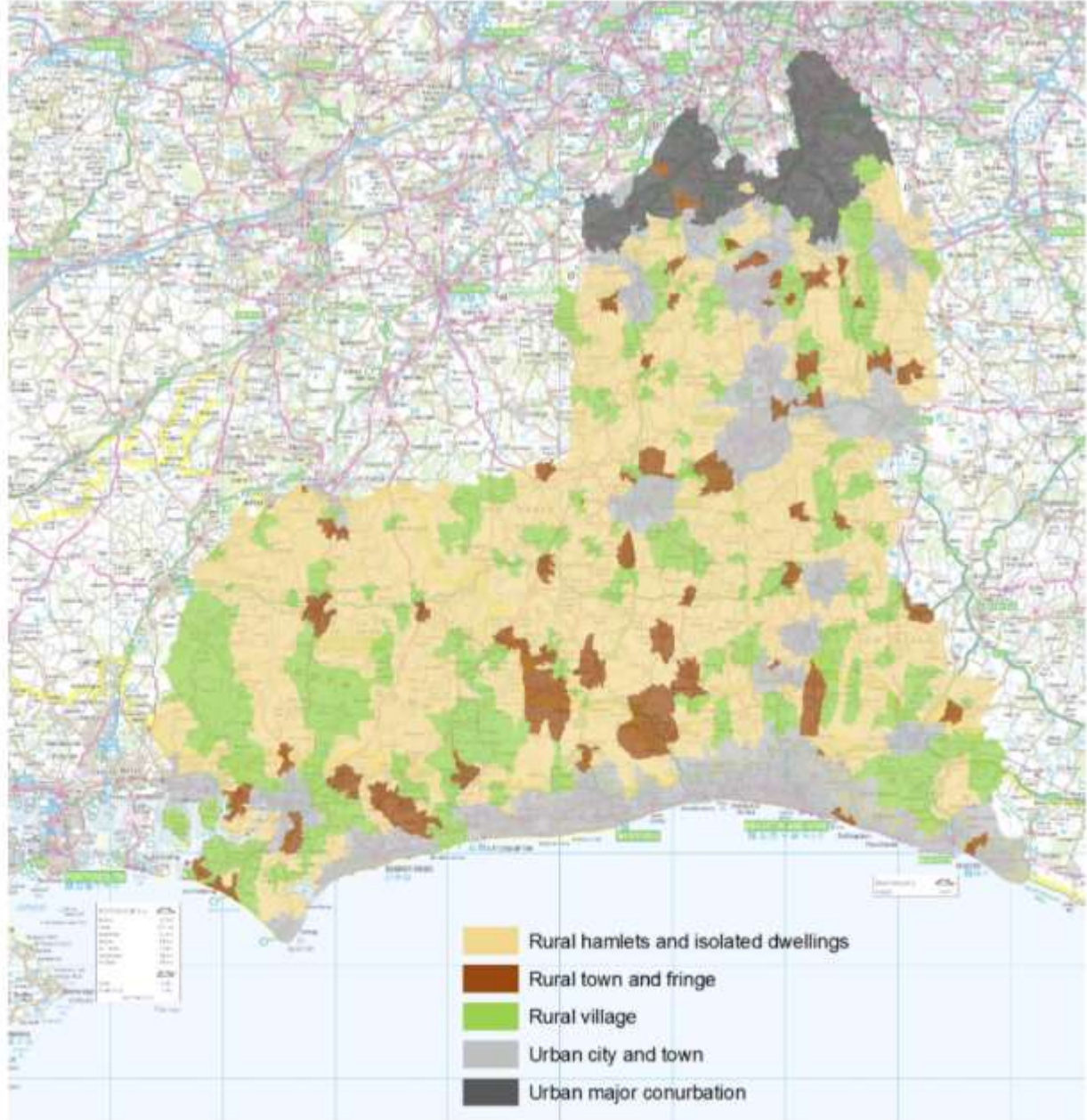
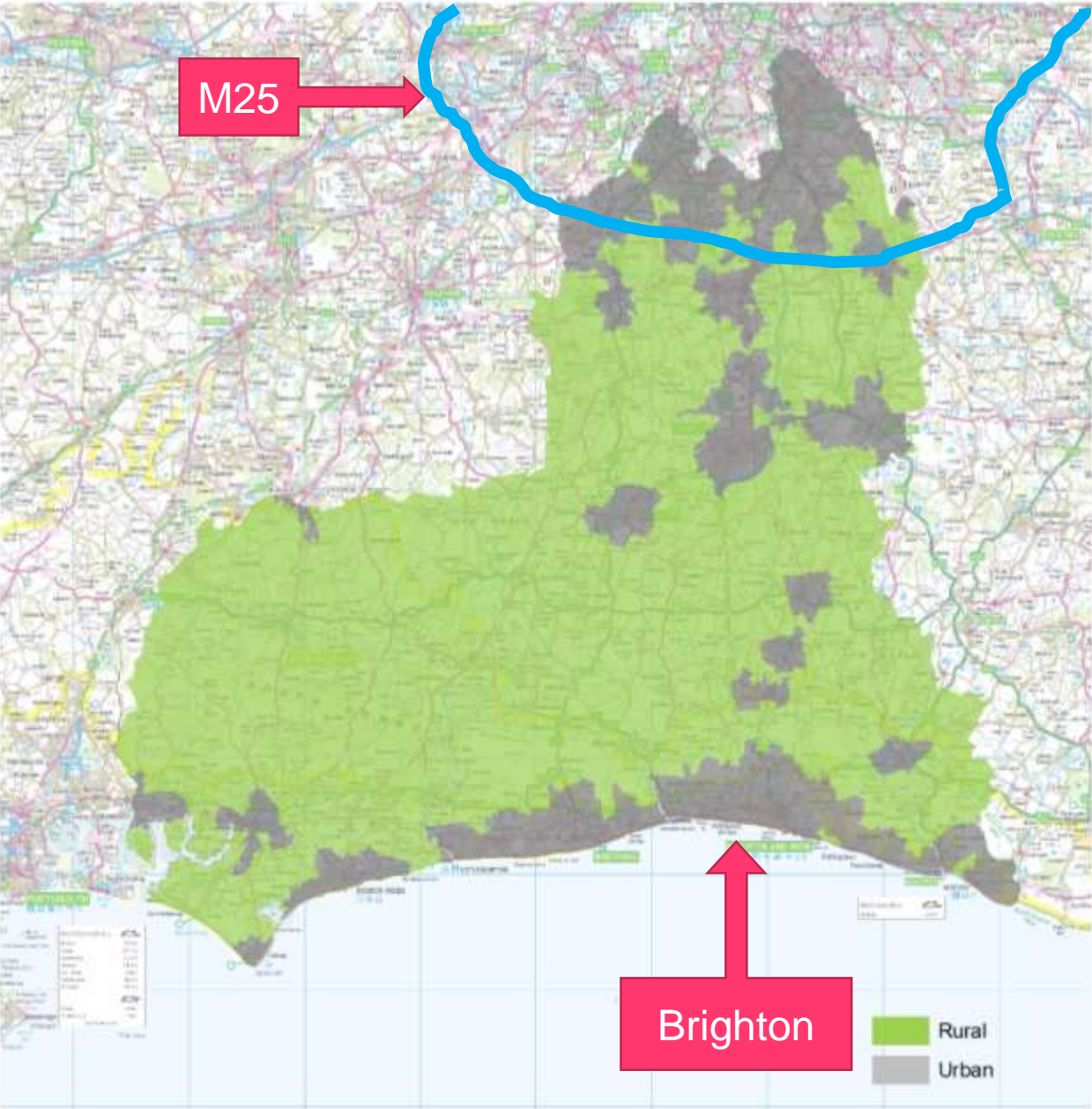


Influencing the Local Enterprise Partnership

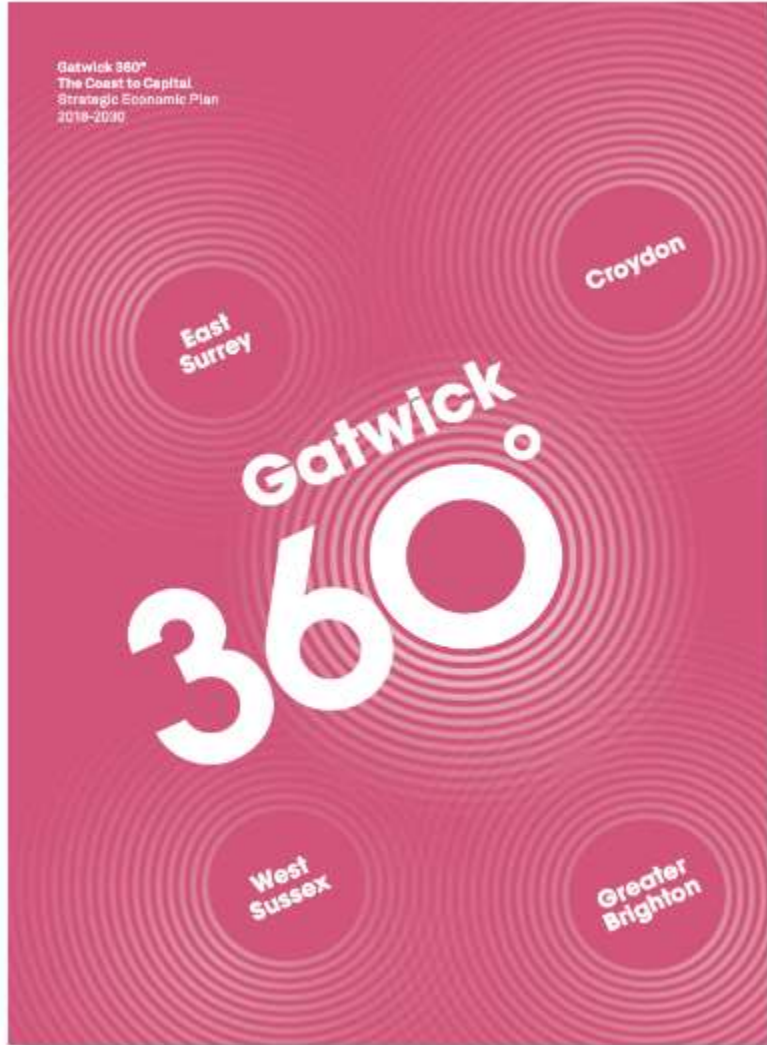


Rural
West Sussex
Partnership

The logo for the Rural West Sussex Partnership features a stylized green graphic of a city skyline above the text. The text is arranged in three lines: 'Rural' in a bold sans-serif font, 'West Sussex' in a regular sans-serif font, and 'Partnership' in a bold sans-serif font.



Strategic Economic Plan



Our eight economic priorities are to:

-  Deliver prosperous urban centres
-  Develop business infrastructure and support
-  Invest in sustainable growth
-  Create skills for the future
-  Pioneer innovation in core strengths
-  Promote better transport and mobility
-  Improve digital network capability
-  Build a strong national and international identity



Figure 2: Map of Coast to Capital's Local Enterprise Partnership network

Strategic Economic Plan

A valuable rural economy

Over a fifth of our businesses are in rural locations, accounting for 27% of our economic output⁶. The rural economy includes a traditional agriculture base and a growing viticulture sector⁷. Rural businesses in the leisure and arts sector have an international reputation, such as the Goodwood Estate, Glyndebourne and Epsom Downs Racecourse. Our countryside is also home to world-leading manufacturing businesses, such as Rolls Royce, AJW Group and Tesla Engineering.

Our **glass house economy** is significant, delivering a retail value of in excess of £1 billion per year and employing more than 9,000 full-time equivalent staff in West Sussex⁸.

“Just 17 references to rural of which only 13 were contextual or within narrative”

Our advantage

Our area is blessed with natural assets that are treasured by residents, businesses and visitors. Preserving and enhancing these, as we grow our economy, is not just the right thing to do, it is an economically essential thing to do. They are the lifeblood of our significant rural economy, and make us a natural partner for Government in the development of its 25 Year Environment Plan.



Asset Farm
© West Sussex County Council

The LIS Challenge



Driving growth
across the whole
country



HM Government

Building our

#IndustrialStrategy

Local Industrial Strategies Evidence Pack 3

XWH Local Industrial Strategies Analytical Panel



Live Draft - June 2019

Natural Capital to improve economic growth and productivity



Our environment underpins our wellbeing and prosperity. We see the economic benefits that flow from the natural world and our natural heritage in increased productivity.

Understand natural capital assets to determine opportunities and potential to contribute to economic growth and productivity

1. Establish a **baseline** of natural capital assets and assess its **contribution** to local growth and productivity, e.g. to local distinctiveness, inward investment, etc. with appropriate metrics/indicators to allow for monitoring and evaluation.
2. Identify environmental **risks** that could impact on growth and productivity e.g. flood risk, air pollution, climate change, environmentally sensitive areas
3. Identify environmentally based, competitive advantage **opportunities**, such as:
 - a. investment that improves natural capital assets at a landscape scale to increase local competitiveness e.g. clean water supplies, clean air, enhanced landscapes and biodiversity.
 - b. the role of Green Infrastructure in making attractive, healthy places where people want to live, learn, work and visit and in helping to address the ageing society grand challenge.
 - c. aligning with environmental net gain approaches supported through the planning system and environmental land management schemes.
 - d. Opportunities to produce raw materials for construction, energy and manufacturing, and for geothermal energy and energy storage and management
4. Map environmental or green jobs locally and identify opportunities to grow sector and improve productivity

Natural capital is the sum of our ecosystems, species, freshwater, land, soils, minerals, our air and our seas. They bring value by providing us with food, clean air and water, wildlife, energy, wood, recreation and protection from hazards. Natural capital can be regarded as the source of all other types of capital: whether manufactured, financial, human or social.

A quarter of registered businesses are based in rural areas where social, demographic, technological and environmental trends are creating new economic opportunities in for example renewable energy, food and drink, green tourism and remote working.

Develop the evidence base on the local rural economy including key characteristics, competitive advantages and barriers to growth.

1. **Comparative rural-urban analysis** of key metrics;
 - Productivity, jobs and wages
 - Business and population demography
 - Journey times to nearest employment centre / services
 - Measures of deprivation
2. Demonstrate understanding local needs and identify opportunities for growth based on consumer, technological and regulatory trends and **competitive advantages of the local area**, including through thorough consultation with rural businesses, communities and organisations.
3. Assess whether rural areas may have more acute or different **barriers to growth** such as accessibility, connectivity, demographic change, housing and access to skills.
4. Evaluate the **role of different settlement types** such as market towns.
5. **Explore inclusive growth** and what this means in a rural context, such as differences between worker and resident based income measures and the role of community-led development.
6. Consider economic opportunities relating to land use and Natural Capital.

Gathering the Evidence Locally

- RWSP Funding Partners
 - Four Districts (predominantly rural)
 - County Council
 - South Downs National Park Authority
- Agreed need for rural evidence base
- Identified suitable consultant to undertake
- Sought input from funding partners
- Cross checked with LEP and LIS guidance
- Researched data over last summer
- Initial submission in August 2019
- Final submission December 2019

Coast to Capital Rural Economy

Economic Dataset LIS submission



Contents

1. Methodology
2. Coast to Capital Rural businesses
3. Coast to Capital Rural employment
4. Coast to Capital GVA
5. Coast to Capital Population

Methodology

Methodology

A brief explanation of the methodology used to analyse the data in this report.

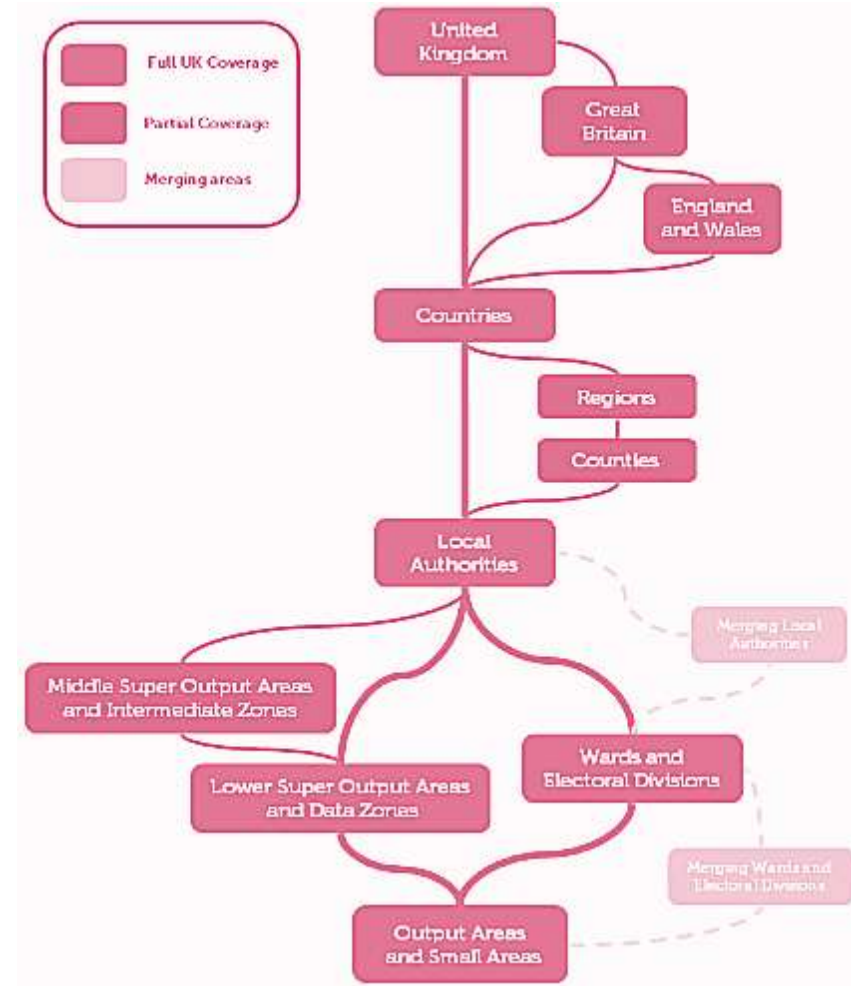
The Defra Urban Rural Classification 2011 (RUC) system has been used to analyse the data.

This is the official statistical method for distinguishing between rural and urban areas.

In the RUC, output areas, the smallest statistical geography, are assigned to one of four urban and six rural categories. They defined as urban if they have a population of 10,000 or more.

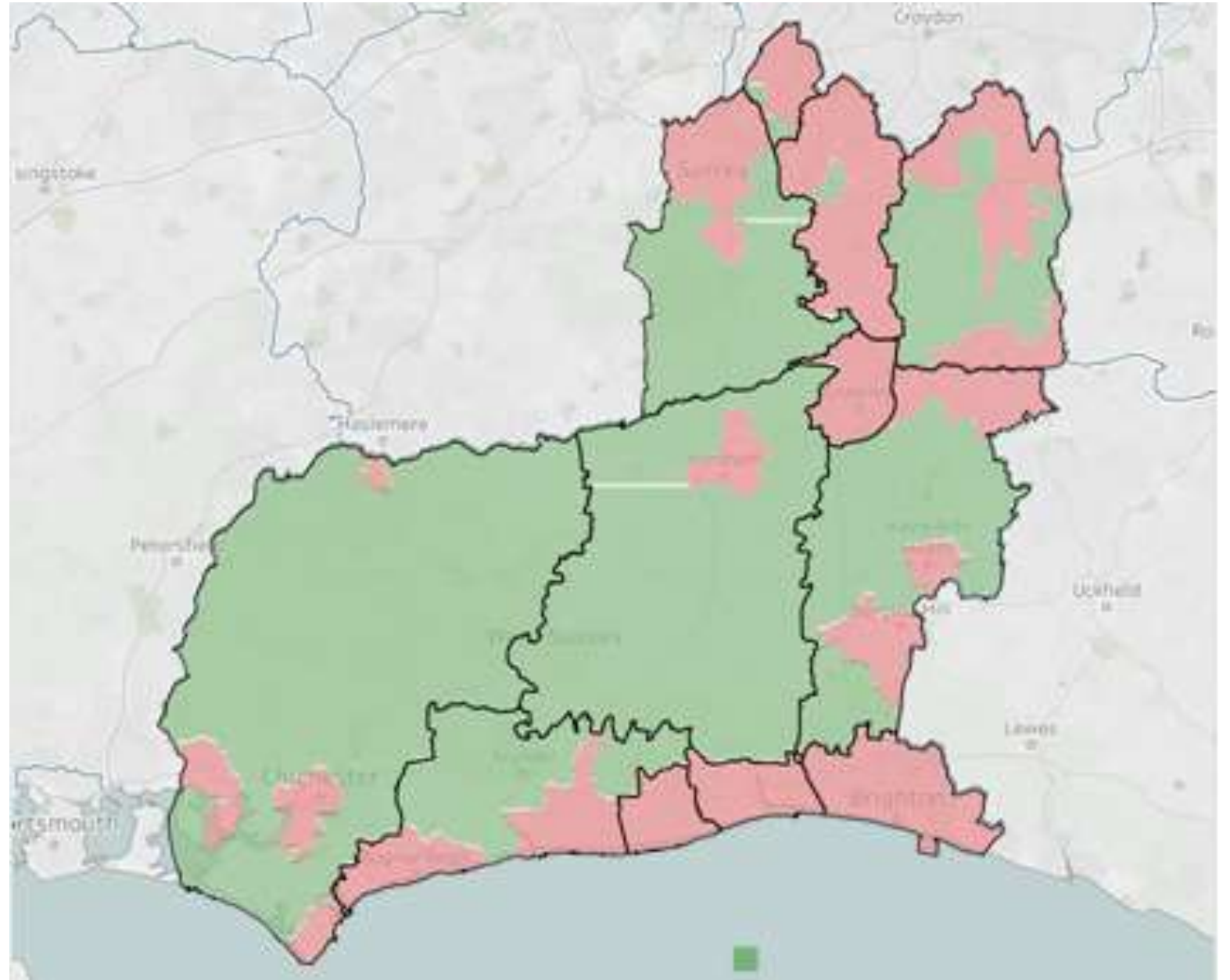
Not all data is available at Output Area level. For this report we have used the smallest level available for each dataset to make it as accurate as possible.

In practice, this has meant we have used Rural and Urban Lower Super Output Areas (LSOAs) in Coast to Capital to analyse most of the data but Middle Super Output Area (MSOAs) or Local Authorities where it is not available at a lower level.



Coast to Capital's Rural area

Using the RUC, the majority of Coast to Capital's land area is Rural



Coast to Capital rural businesses

Rural and urban business population

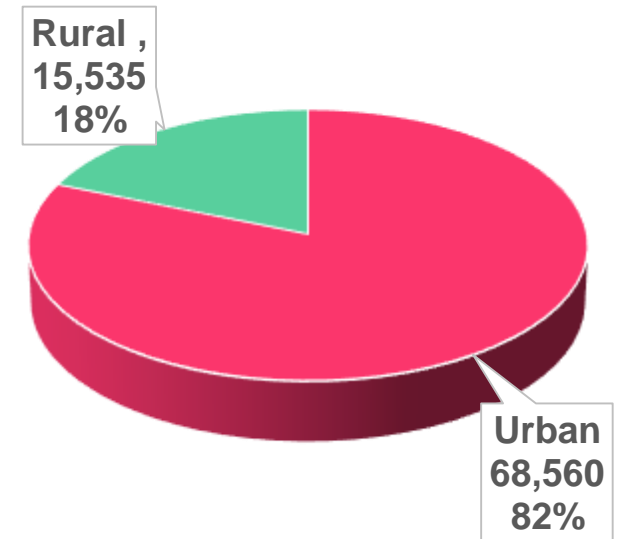
.Source: ONS UK Business Counts 2019
(MSOA level analysis)

Urban businesses

Of the 84,095 businesses in Coast to Capital, 68,560 or 81.53% of businesses are in urban areas in Coast to Capital.

Rural businesses

15,535 or just under 18.47% of businesses are in rural areas in Coast to Capital.



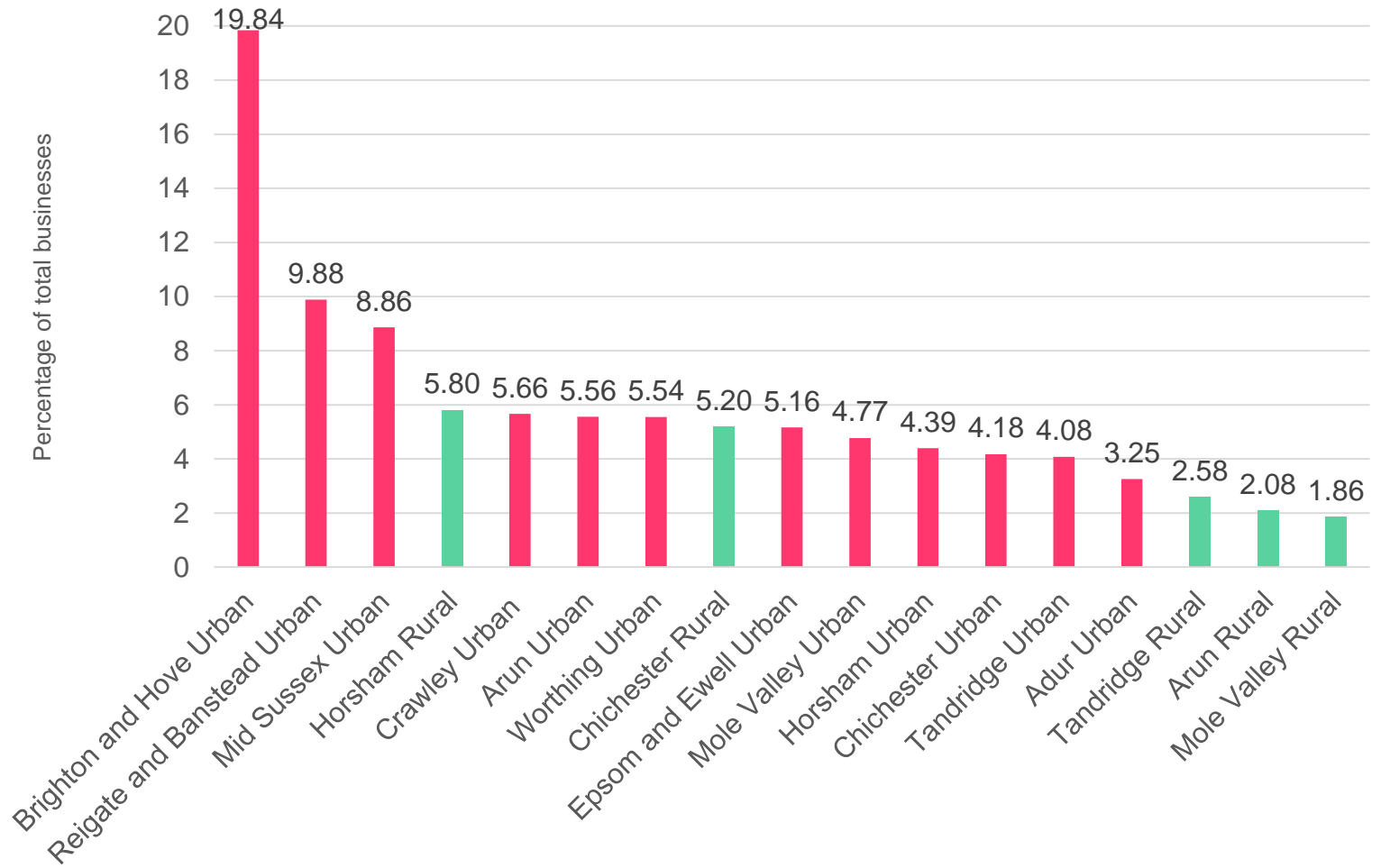
■ Urban ■ Rural

Coast to Capital's urban and rural businesses

The largest concentration of rural businesses is based in Rural Horsham where 5.8% of Coast to Capital's businesses are based, a slightly higher share than Crawley which has 5.7%.

Businesses tend to cluster in Brighton and Hove Urban area which has nearly 20% of Coast to Capital's businesses, followed by Urban Reigate and Banstead (9.88%) and Mid Sussex Urban area (8.86%).

Source: ONS UK Business Counts 2017



Coast to Capital local authority

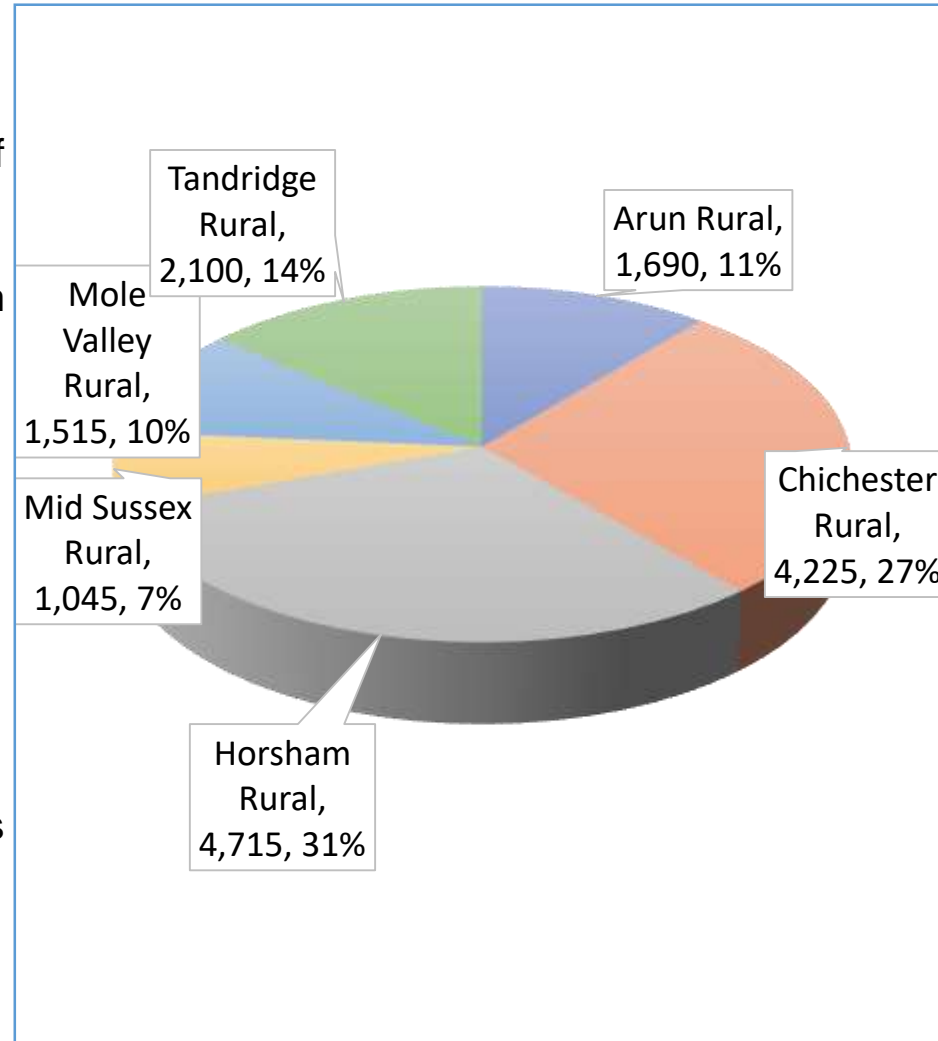
Rural businesses

Of the Rural business population of 15,290, Rural Horsham has the largest share (31%) of Coast to Capital's Rural business population followed by Rural Chichester with 27%.

Professional Scientific & Technical is the most numerous with 18.51% of businesses in Rural Coast to Capital in this sector.

Agriculture, Forestry & Fishing, makes up just 7.88% of rural businesses in Coast to Capital.

Source: ONS, UK Business Counts 2017



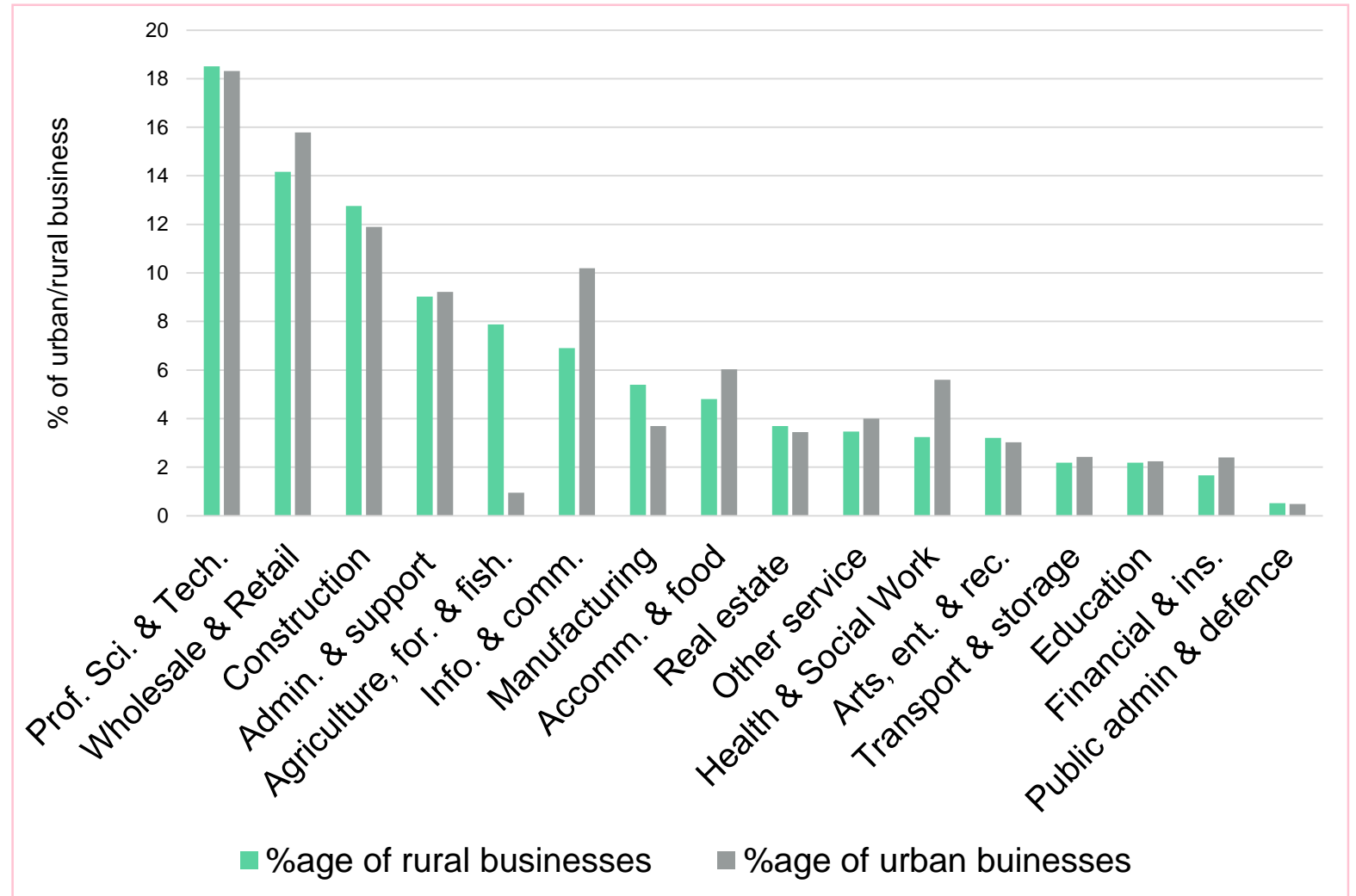
	Rural No.s	%age
Prof. Sci. & Technical	2,830	18.51
Wholesale & Retail	2,165	14.16
Construction	1,950	12.75
Admin. & support	1,380	9.03
Agriculture, for. & fishing	1,205	7.88
Info. & communication	1,055	6.90
Manufacturing	825	5.40
Accommodation & food	735	4.81
Real estate	565	3.70
Other service	530	3.47
Health & Social Work	495	3.24
Arts, ent. & recreation	490	3.20
Transport & storage	335	2.19
Education	335	2.19
Financial & insurance	255	1.67
Public admin & defence	80	0.52
Water & waste	55	0.36
Mining & quarrying	5	0.03
Total	15,290	100.00

Urban and Rural sectoral differences

In both rural and urban Coast to Capital, Professional, Scientific and Technical make up over 18% of all businesses but in rural areas there are higher percentages of businesses in Construction, Agriculture, Forestry & Fishing and Manufacturing.

Rural areas have significantly lower percentages of businesses in Information & Communication, a key knowledge economy sector.

Source: ONS UK Business Counts 2017



Rural economy at local level

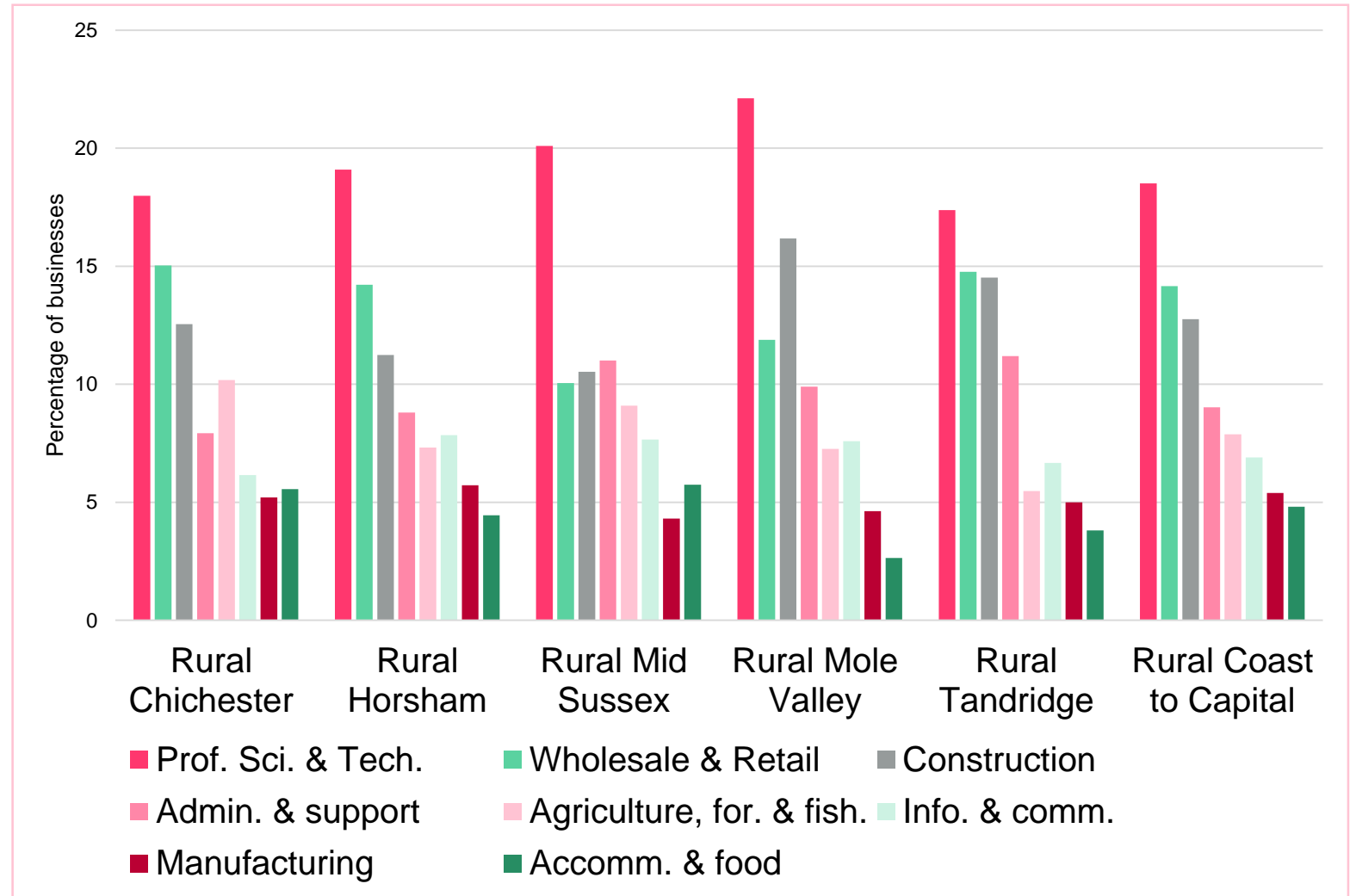
At local authority level in Coast to Capital, the sectoral make up of the rural economy varies.

Rural Mole Valley has the highest concentration of Professional Scientific & Technical businesses (22.11%) and it also has the largest concentration of Construction (16.71%).

Rural Chichester has the biggest percentage of Agriculture, Forestry & Fishing (10.18%), probably due to the presence of horticulture.

Rural Horsham has the highest percentage of rural Manufacturing (5.73%).

Source: ONS UK Business Counts 2017 (Top 8 sectors only)



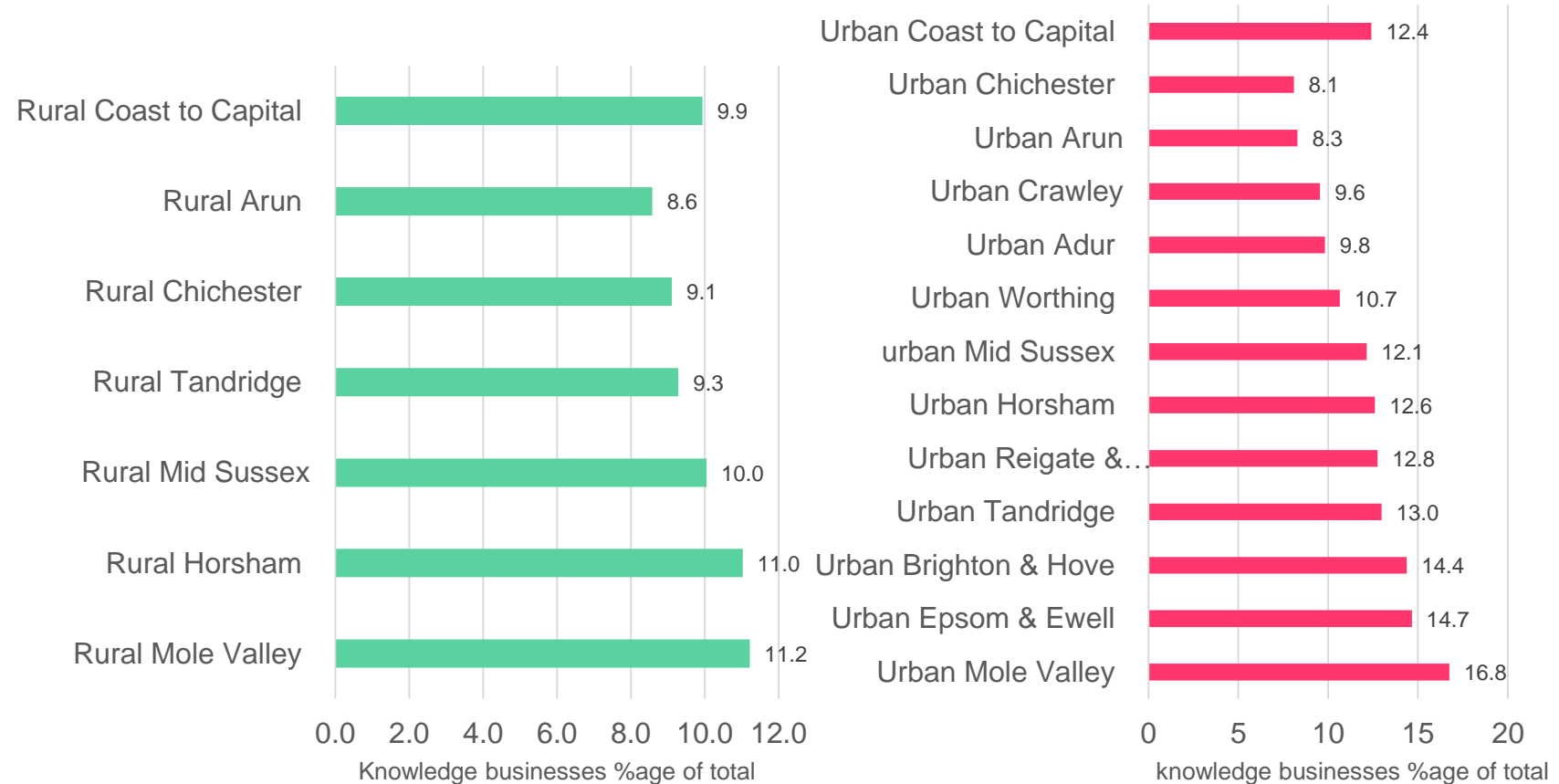
The knowledge economy

The knowledge economy is the part of the economy with greater dependence on knowledge, information and high skills levels and is a driver of increased productivity. The rural economy is less knowledge-intensive than the urban economy in Coast to Capital with 9.9% of businesses in Knowledge Economy sectors compared to 12.4% in urban areas

Mole Valley leads on knowledge economy in both rural and urban areas, while both Rural and Urban Arun and Chichester have the lowest percentages of knowledge economy businesses.

The knowledge economy is heavily concentrated along the M25 corridor in the north and Brighton & Hove in the south.

Source: ONS UK Business Counts 2017



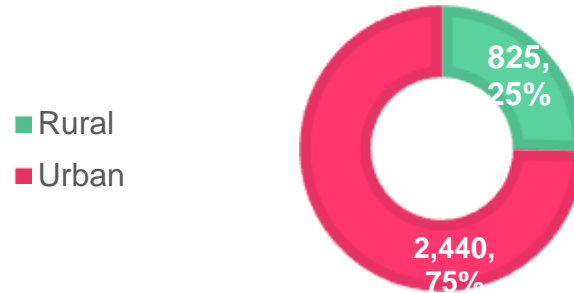
Rural Manufacturing

5.4% of all businesses in Rural Coast to Capital are in Manufacturing compared to 3.7% in Urban Areas.

Of the 3,265 Manufacturing businesses in Coast to Capital, 25% are in Rural and 75% are in Urban Coast to Capital.

Employment shows a similar distribution with 26,600 (75%) of Coast to Capital's 35,410 manufacturing jobs in Urban areas and 8,810 (25%) in Rural Coast to Capital.

MANUFACTURING BUSINESSES



The majority of Rural manufacturing is in Rural Horsham and Rural Chichester, both of which have a larger average number of employees per manufacturing business.

The highest concentration of Advanced Manufacturing and Engineering (AME) is in Rural Horsham with 35% of rural Manufacturing in this category.

	Rural Arun	Rural Chichester	Rural Horsham	Rural MidSussex	Rural Mole Valley	Rural Tandridge	Rural Coast to Capital
Firms	115	220	270	45	70	105	825
Jobs	700	3,500	3,000	700	300	600	8,810
Jobs/firm	6.09	15.91	11.11	15.56	4.29	5.71	10.68
AME	30	60	95	5	20	35	245
%age AME	26.1%	27.3%	35.2%	11.1%	28.6%	33.3%	29.7%

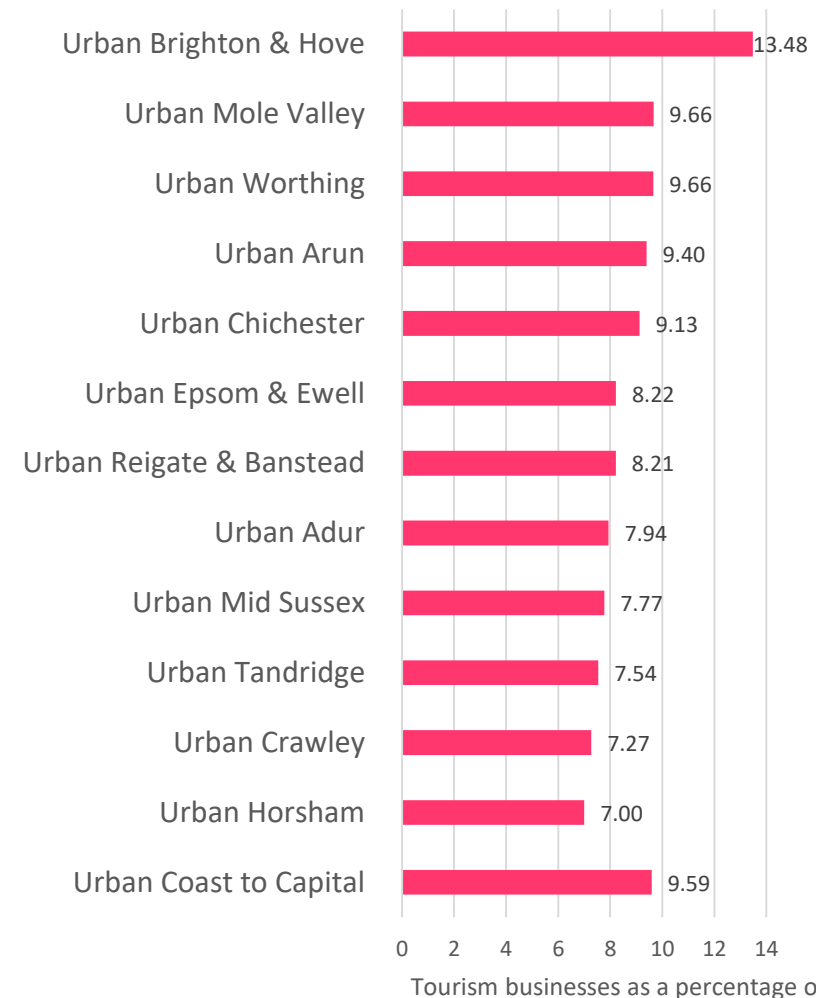
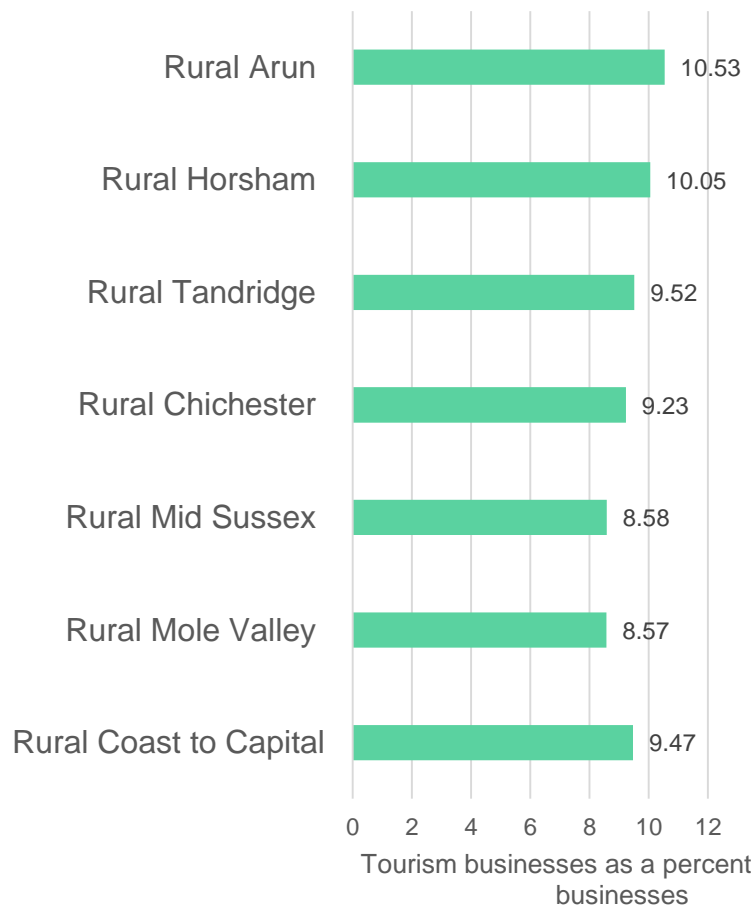
The visitor economy

Both Urban and Rural Coast to Capital have just under 10% of businesses in the visitor economy.

Urban tourism is clustered in Brighton Hove with over 13% of businesses in the sector.

Rural Arun and Rural Horsham are popular locations for tourism businesses, while Mole Valley has the second highest concentration of urban tourism after Brighton and Hove. Much of Rural Mole Valley is protected landscape and this tends to limit business growth.

Source: ONS UK Business Counts using ONS Tourism definition (includes transport)



Rural Economy

Key Findings

- Nearly a fifth or 19% of Coast to Capital's businesses are base in the Rural Area.
- Of the 15,290 rural business population, Horsham has the most with 31% followed by Chichester (27%)
- The biggest sector in Rural Coast to Capital is Professional, Scientific & Technical (18.51%) followed by Wholesale & Retail (14.16%) and Construction (12.75%) while Agriculture, Forestry & Fishing makes up 7.88% of businesses.
- There are differences in the make up of the Urban and Rural business base. Rural Coast to Capital has higher shares of Construction, Agriculture, Forestry & Fishing and Manufacturing and lower shares of Information & Communication and Health & Social work than Urban Coast to Capital
- At local level, there are differences in the rural economy as Rural Chichester is relatively more dependent on Agriculture, Rural Horsham has the highest concentration of rural manufacturing and Rural Mole Valley has the highest concentration of Professional, Scientific & Technical businesses
- The Coast to Capital rural economy is less knowledge intensive than the urban economy with fewer than 10% of businesses in knowledge-intensive sectors compared to 12.4% in Urban areas.
- However, this is largely a problem of the underperformance of the Coastal economy with Rural Arun and Rural Chichester performing particularly poorly on this metric.

Rural Economy

Key findings continued

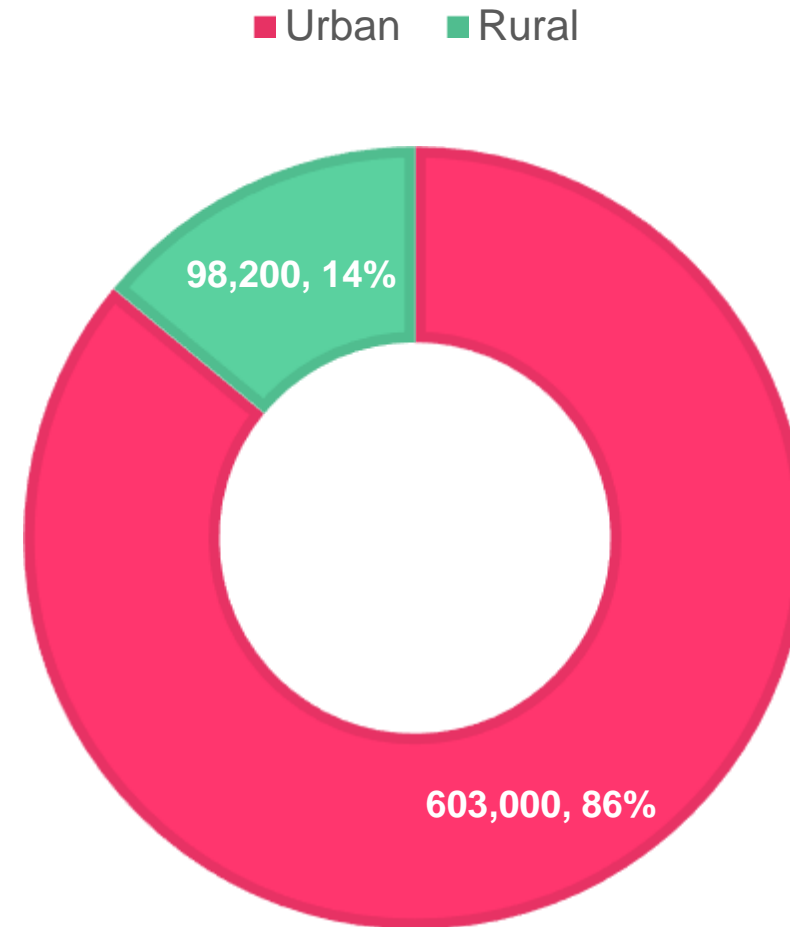
- Manufacturing is a particularly important sector in Rural Coast to Capital. A quarter of Coast to Capital's manufacturing businesses are in rural areas.
- The 825 rural manufacturing businesses provide 8,810 jobs or 25% of Coast to Capital's manufacturing employment.
- The majority of rural manufacturing is based in Rural Chichester and Rural Horsham. Manufacturing firms in these areas tend to have higher numbers of employees per business.
- The highest percentage of rural Advanced Manufacturing and Engineering (AME) is in Rural Horsham where 35% of firms are in this category compared to 30% in Rural Coast to Capital as a whole.
- The visitor economy is an important sector in Rural Coast to Capital where, as in urban areas, it makes up just under 10% of all businesses.
- Rural Arun and Rural Horsham have the highest concentrations of rural tourism businesses but Urban Brighton & Hove outperforms both all other Urban and Rural areas with 13.48% of its businesses in the visitor economy.

Coast to Capital Rural Employment

Urban and Rural jobs

- Of the 701,200 jobs in Coast to Capital, 86% or 603,000 are in urban areas and 14% or 98,200 are in rural areas.
- As 19% of the business population is in Rural Coast to Capital, this implies that rural businesses are smaller than their urban counterparts.
- Rural businesses have an average of 6.41 employees while urban businesses have an average of 7.42 employees

Source: ONS Business Register and Employment Survey (BRES) 2017 Includes self employed/sole proprietors. Does not include farm based employment.



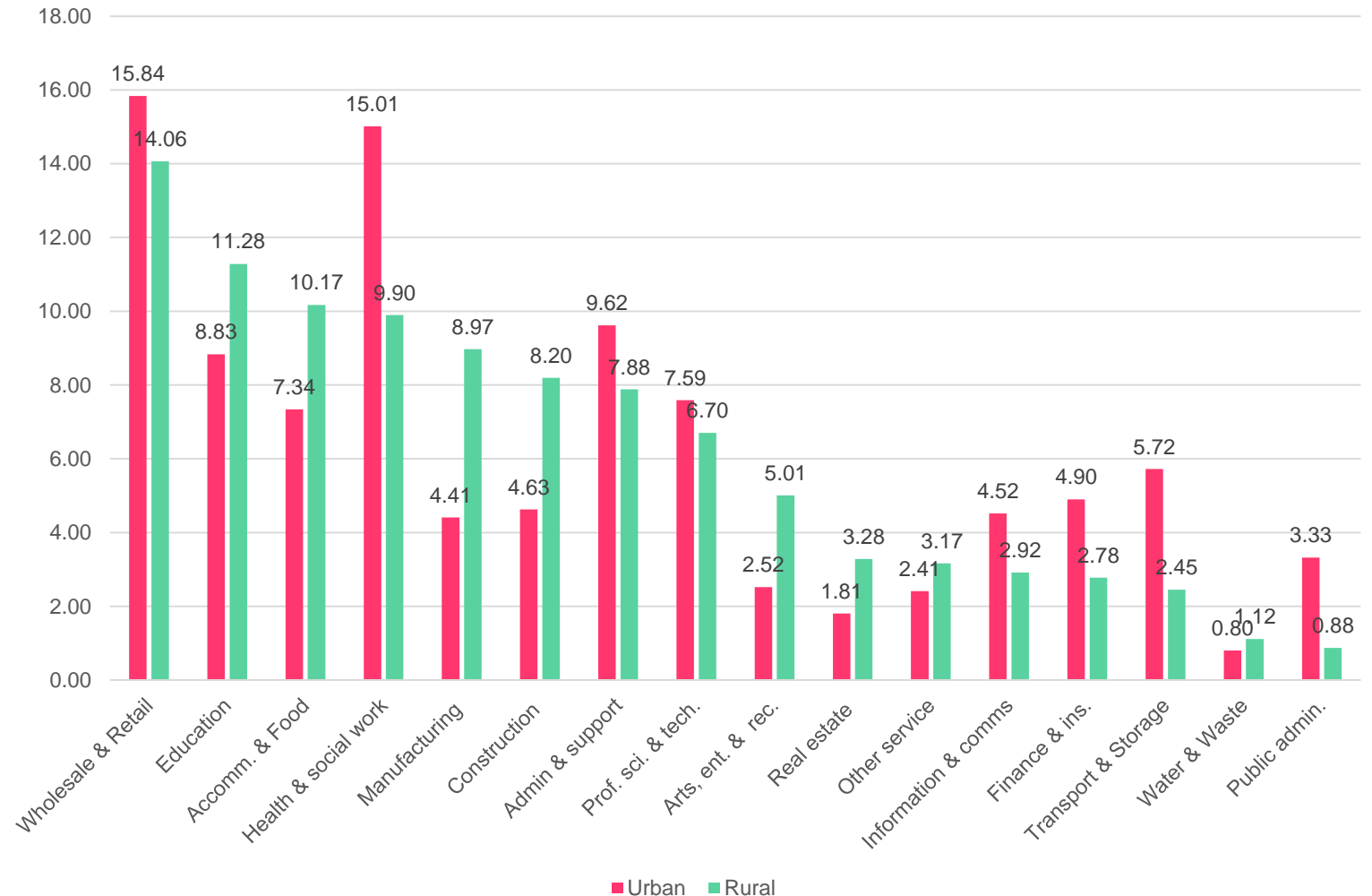
Urban and rural jobs by sector

Just as with business composition, there are differences between urban and rural employment structure in Coast to Capital.

Although Wholesale & Retail provides the highest percentage of jobs in both urban and rural areas, Rural Coast to Capital has significantly more jobs in Education, Accommodation & Food, Manufacturing, Construction and Arts, Entertainment & Recreation.

Urban Coast to Capital has more jobs in knowledge-intensive sectors such as Health, Professional, Scientific and Technical, Information & Communication and Finance & Insurance as well as Public Administration.

Source: ONS Business Register and Employment Survey (BRES) 2017. N.B. Does not include Agriculture as farm-based employment is not included in BRES.



Rural jobs

In numerical terms, the highest numbers of rural jobs are in Rural Horsham, with 31,000 or 30% reflecting its proximity to Gatwick and the availability of employment space in a number of industrial estates.

The second highest provider of rural jobs is Rural Chichester with 26,000 jobs including 3,500 jobs in Wholesale & Retail and a similar number in Manufacturing.

The largest numbers of jobs in each sector is highlighted in red in the table showing Rural Horsham's and Rural Chichester's importance as employment centres.

Source: ONS Business Register and Employment Survey (BRES) 2017. N.B. Does not include Agriculture as farm-based employment is not included in BRES

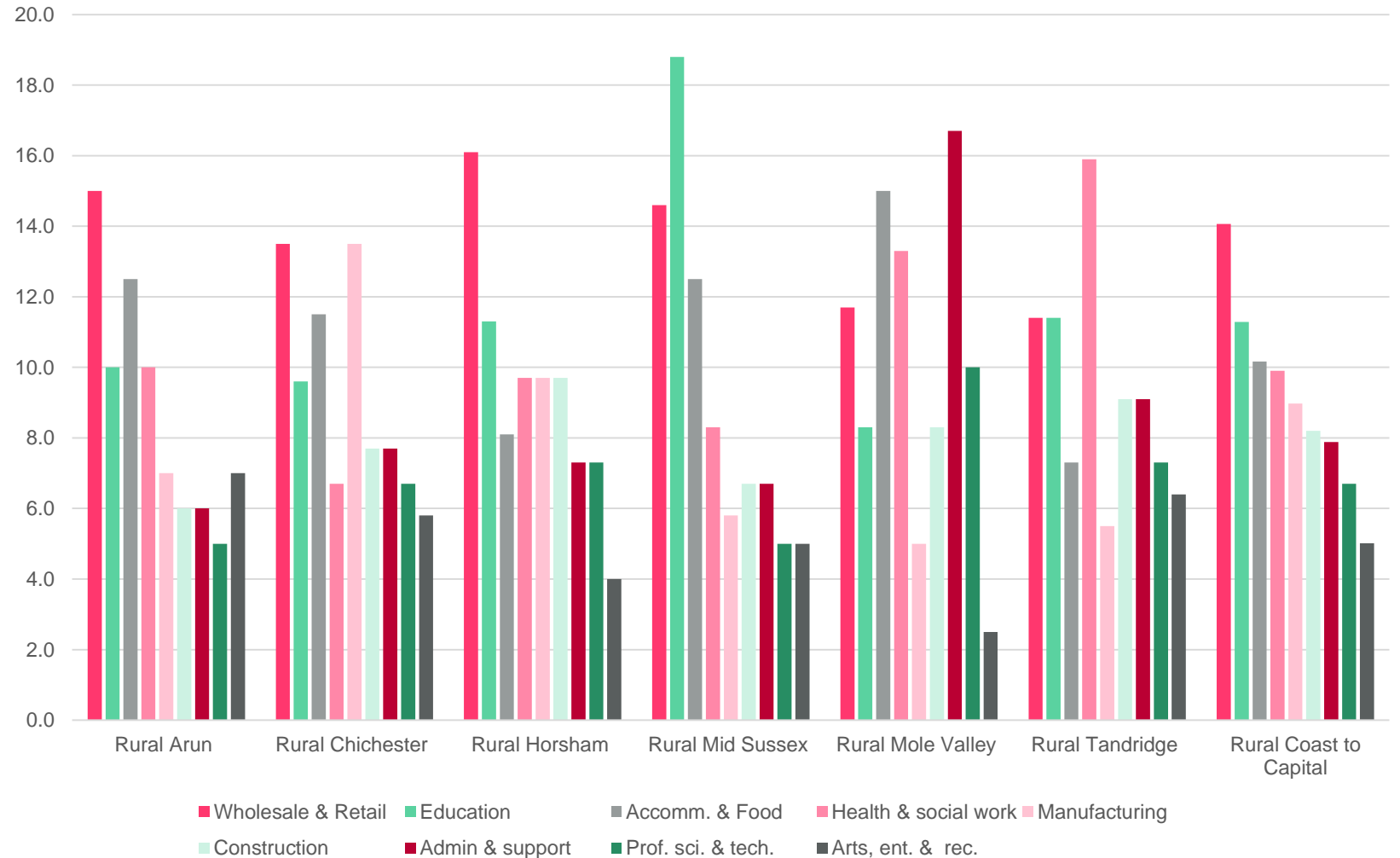
	Rural Arun	Rural Chichester	Rural Epsom & Ewell	Rural Horsham	Rural Mid Sussex	Rural Mole Valley	Rural Reigate & Banstead	Rural Tandridge	Rural Coast to Capital
Wholesale & Retail	1,500	3,500	35	5,000	1,750	700	75	1,250	13,810
Education	1,000	2,500	50	3,500	2,250	500	30	1,250	11,080
Accomm. & Food	1,250	3,000	0	2,500	1,500	900	35	800	9,985
Health & social work	1,000	1,750	400	3,000	1,000	800	20	1,750	9,720
Manufacturing	700	3,500	5	3,000	700	300	5	600	8,810
Construction	600	2,000	50	3,000	800	500	100	1,000	8,050
Admin & support	600	2,000	40	2,250	800	1,000	50	1,000	7,740
Prof. sci. & tech.	500	1,750	35	2,250	600	600	45	800	6,580
Arts, ent. & rec.	700	1,500	10	1,250	600	150	10	700	4,920
Real estate	200	1,250	0	1,000	400	150	20	200	3,220
Other service	175	700	10	1,250	450	225	0	300	3,110
Information & comms	175	500	25	1,250	450	175	40	250	2,865
Finance & ins.	600	500	5	225	175	50	1,000	175	2,730
Transport & Storage	350	400	30	700	300	125	0	500	2,405
Water & Waste	350	75	0	300	125	150	20	75	1,095
Public admin.	250	200	0	125	35	150	0	100	860
Electricity, gas etc.	0	100	0	10	0	0	0	30	140
Mining & Quarr	10	15	0	15	10	0	0	10	60
Column Total	10,000	26,000	700	31,000	12,000	6,000	1,500	11,000	98,200

Rural jobs at local level

At local authority level, there are some notable differences in the rural job structure.

Wholesale & Retail, the sector with the highest percentage of jobs in Rural Coast to Capital as a whole, is concentrated in Rural Arun, Rural Chichester and Rural Horsham while Education is heavily based in Rural Mid Sussex. Above average concentrations of Accommodation and Food are found in Rural Mid Sussex, Rural Arun and Rural Chichester, while Rural Manufacturing jobs are over-represented in Chichester with over 13% of all jobs in Manufacturing.

Source: ONS Business Register and Employment Survey (BRES) 2017. N.B. Does not include Agriculture as farm-based employment is not included in BRES



Rural and urban wages

Coast to Capital Rural residents' median weekly wages are £32 or 6.02% higher than those of their urban counterparts.

Those with the skills in affluent urban areas will tend to commute to better paid jobs elsewhere.

The situation is reversed for workplace wages which are £10 per week or 1.9% lower, reflecting the less knowledge intensive nature of the rural economy and its dependence on low value added employment.



Rural residence and workplace wages

Across Rural Coast to Capital, both residence and workplace based median weekly wages vary quite considerably.

Median residence-based weekly wages range from £700 in Rural Mid Sussex to £532 in Rural Tandridge, 24% lower.

The highest rural workplace wages are also in Rural Mid Sussex while the lowest are in Rural Mole Valley, at £387, a difference of over a third.



Rural employment

Key findings

Note: Farm based employment data are not included in BRES statistics as they are provided separately by Defra and are not included as they are not compatible.

- 98,200 or 14% of Coast to Capital's jobs are in rural areas, lower than the percentage share of the LEP's business population and indicating that rural businesses have fewer employees than urban ones.
- The Wholesale & Retail sector provides the greatest numbers of jobs in both rural and urban areas but Rural Coast to Capital is slightly less dependent on this sector. This could make it more resilient to further shrinkage in the retail sector, along with the lower presence of multiples in many rural towns.
- Rural Coast to Capital has significantly more jobs in Education, Accommodation & Food, Manufacturing, Health & Social Work and Construction.
- Together with Wholesale & Retail, these sectors are the biggest employers in rural areas.
- Urban Coast to Capital has more jobs in knowledge intensive sectors such as Professional, Scientific & Technical, Information & Communication and Finance & Insurance.
- Rural Horsham and Rural Chichester provide the highest percentages of rural jobs and are important employment centres with 57,000 jobs or 58% of Rural Coast to Capital jobs between them.
- Rural Manufacturing, Accommodation & Food and Arts, Entertainment & Recreation jobs tend to be concentrated in Rural Chichester, while Rural Horsham leads on Wholesale & Retail and Education. Rural Reigate and Banstead has a high concentration of Finance and Insurance businesses.
- The highest residence based wages are in rural Coast to Capital but rural workplace wages are lower than urban workplace wages. The gap between the well off with skills in rural areas who commute out to higher paid employment and those who work locally in lower value jobs is evident.

Coast to Capital GVA

GVA

GVA data are not available below Local Authority level. Defra's Rural Urban Classification (RUC) system identifies, 2 Coast to Capital Districts, Tandridge and Mole Valley, as including significantly rural areas and 2, Chichester and Horsham as being largely rural.

Lewes and Croydon have been included for comparison purposes

GVA data at local authority level indicates that GVA growth has been below Coast to Capital average in 3 out of the 4 more Rural local authorities between 2012 and 2016, the latest year for which data are available.

Source: ONS Regional Productivity Data (balanced method)

	GVA £sm 2016	GVA growth 2012-16	Defra Rural/Urban Classification (RUC)			
Crawley	4,977	29.91	Urban w. City & Town			
Lewes	2,049	25.17	Urban w. Significant Rural inc. hub towns			
Brighton & Hove	7,349	19.36	Urban w. City & Town			
Horsham	3,573	17.80	Largely Rural inc. hub towns			
Adur	1,169	15.74	Urban w. City & Town			
Mid Sussex	3,622	14.15	Urban w. City & Town			
Coast to Capital	50,752	13.70	N/A			
Tandridge	2,225	13.46	Urban w. Significant Rural inc. hub towns			
Mole Valley	3,503	11.81	Urban w. Significant Rural inc. hub towns			
Croydon	7,727	11.15	Urban w. Major Connurbation			
Epsom & Ewell	1,989	9.11	Urban w. Major Connurbation			
Arun	2,549	8.89	Urban w. City & Town			
Chichester	3,132	7.67	Largely Rural inc. hub towns			
Reigate & Banstead	4,302	4.47	Urban w. City & Town			
Worthing	2,586	1.02	Urban w. City & Town			

GVA per job

The more rural districts of Mole Valley, Tandridge and Horsham perform well on GVA per job. If Croydon is not included, they are the top three local authority districts in Coast to Capital.

Manufacturing is an important contributor to productivity so the higher concentration of manufacturing in rural areas may be a factor.

However, the very poor performance of Chichester on this metric would tend to go against the trend.

Source: ONS Regional Productivity Data (balanced method)

	GVA per Job	Defra's Rural Urban Classification (RUC)			
Mole Valley	77,844	Urban w. Significant Rural inc. hub towns			
Tandridge	69,531	Urban w. Significant Rural inc. hub towns			
Croydon	66,043	Urban w. Major Conurbation			
Horsham	64,964	Largely Rural inc. hub towns			
Epsom & Ewell	64,161	Urban w. Major Conurbation			
Reigate & Banstead	63,265	Urban w. City & Town			
Mid Sussex	61,390	Urban w. City & Town			
Coast to Capital	59,920	N/A			
Adur	58,450	Urban w. City & Town			
Lewes	56,917	Urban w. Significant Rural inc. hub towns			
Arun	55,413	Urban w. City & Town			
Worthing	55,021	Urban w. City & Town			
Brighton & Hove	53,642	Urban w. City & Town			
Crawley	53,516	Urban w. City & Town			
Chichester	51,344	Largely Rural inc. hub towns			

Coast to Capital GVA

Key findings

Note: GVA data are not available below Local Authority District Level and 2016 is the most recent year available

- Growth in output (GVA) between 2012 to 2016 has been below the LEP average in 3 out of the 4 more rural local authority districts, i.e.:
- Tandridge (Urban with Significant Rural)
- Mole Valley (Urban with Significant Rural)
- Chichester (Largely Rural)
- Horsham's growth has been above average.
- Total output from the four more rural Local Authority Districts was £12,433m in 2016, or just over 30% of Coast to Capital output of £40,976m. (not including Croydon and Lewes)
- These four more rural local authorities contain 27,340 businesses, or 33.6% of the LEP's business base.
- ON GVA per job, Horsham, Tandridge and Mole Valley perform above average.
- If Croydon is not included, they are the top three on this measure.
- This may be in part due to the above average presence of manufacturing which tends to have high GVA per job.
- However this does not account for the poor performance of Chichester on this measure which has the lowest GVA per job of all Coast to Capital local authorities.

Coast to Capital Rural Population

Rural Urban population split

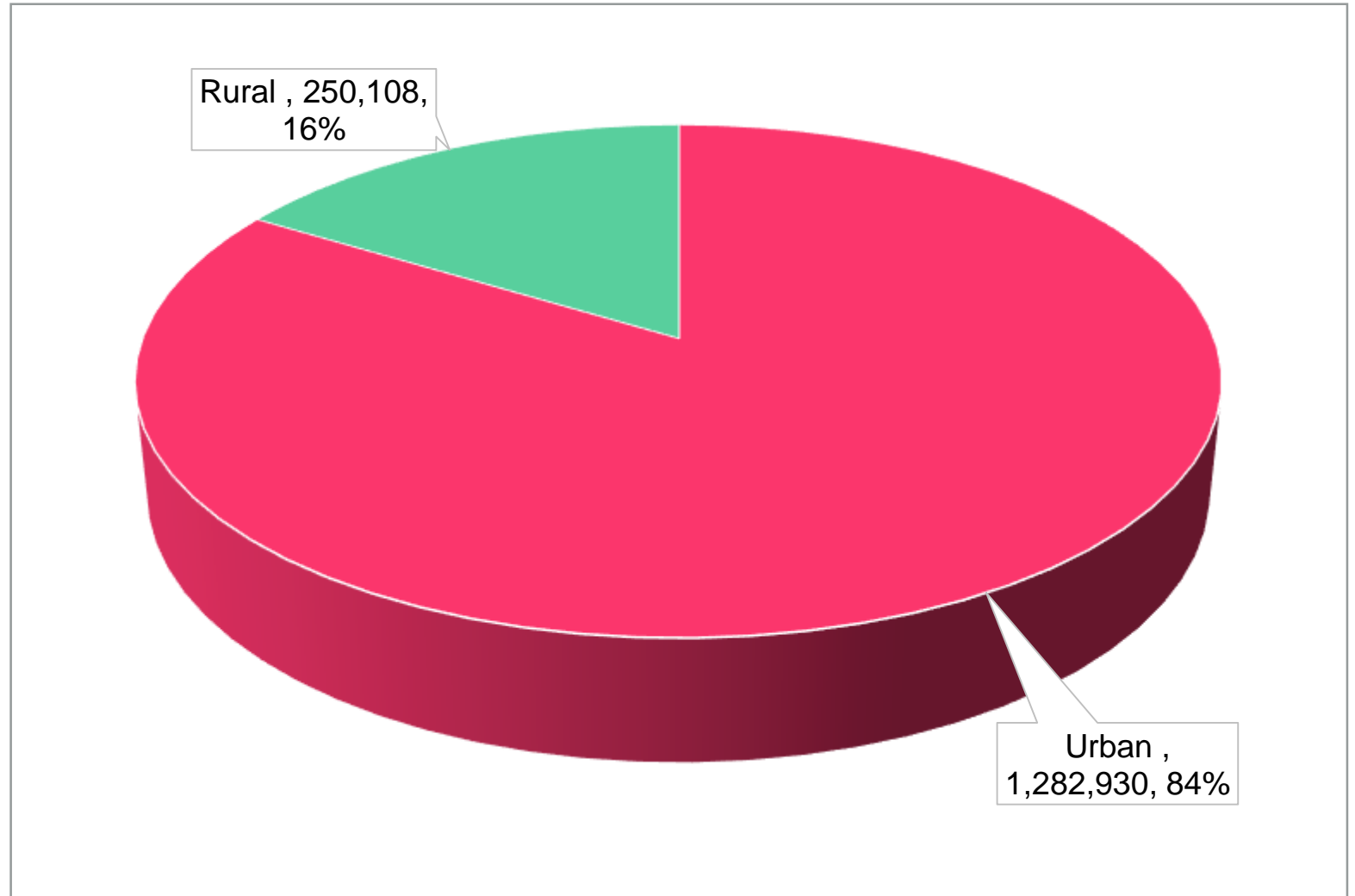
Just over a quarter of a million or 16% of Coast to Capital's population live in the rural area.

This is lower than the Rural area's 20% share of the business population and means that Rural Coast to Capital has more businesses per head than Urban Coast to Capital .

There are 611 businesses per 10,000 population in Rural Coast to Capital compared to 450 in England

There are 479 businesses per 10,000 population in Coast to Capital compared to 380 in England (excluding London)

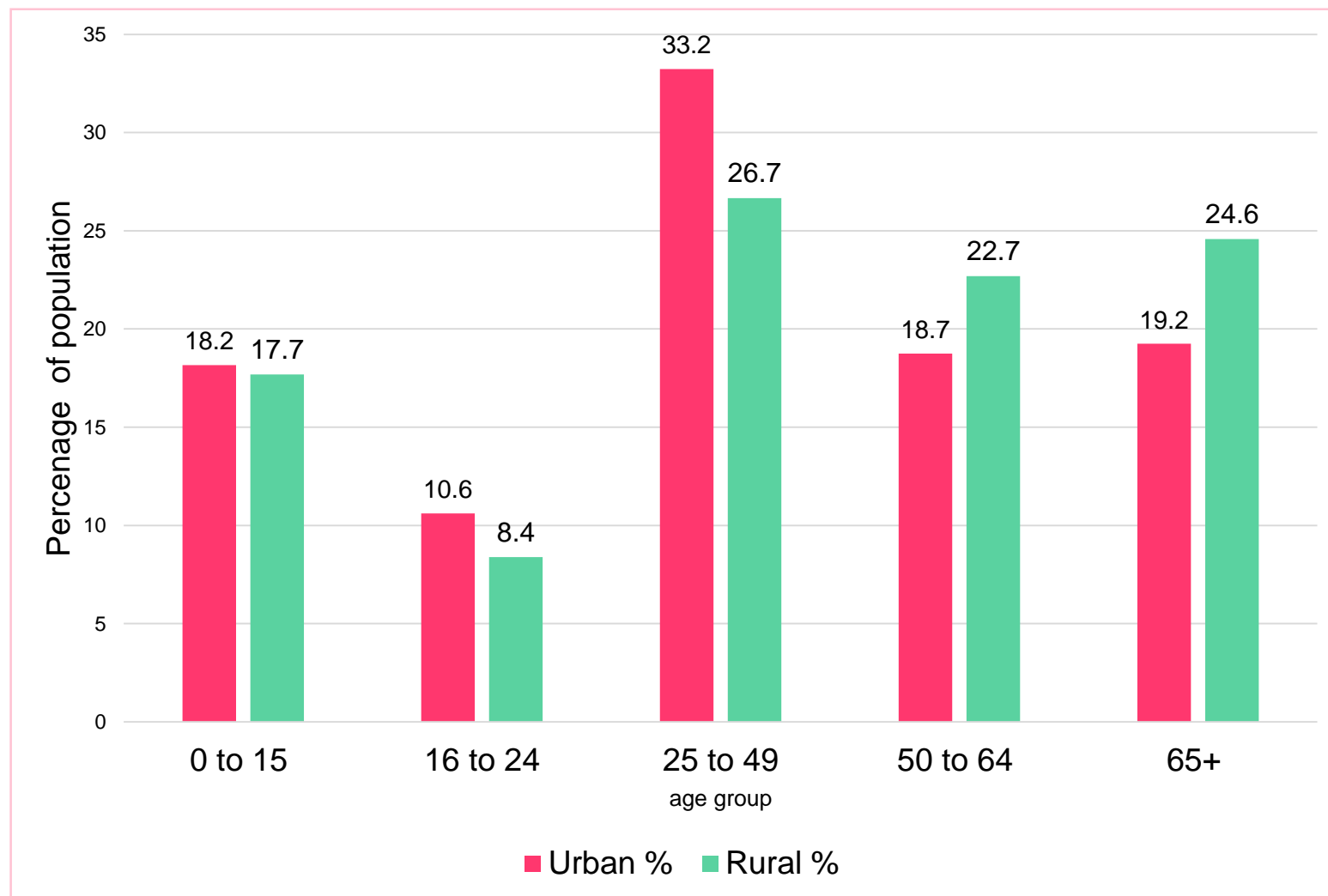
Source: ONS Mid Year Population estimates 2017



Coast to Capital Rural Urban Population Age Profile

Rural Coast to Capital has a lower percentage of population in the under 50s and a higher percentage of its population in the 50+ and 65+ age brackets.

Source: ONS Mid Year Population
Estimates 2017

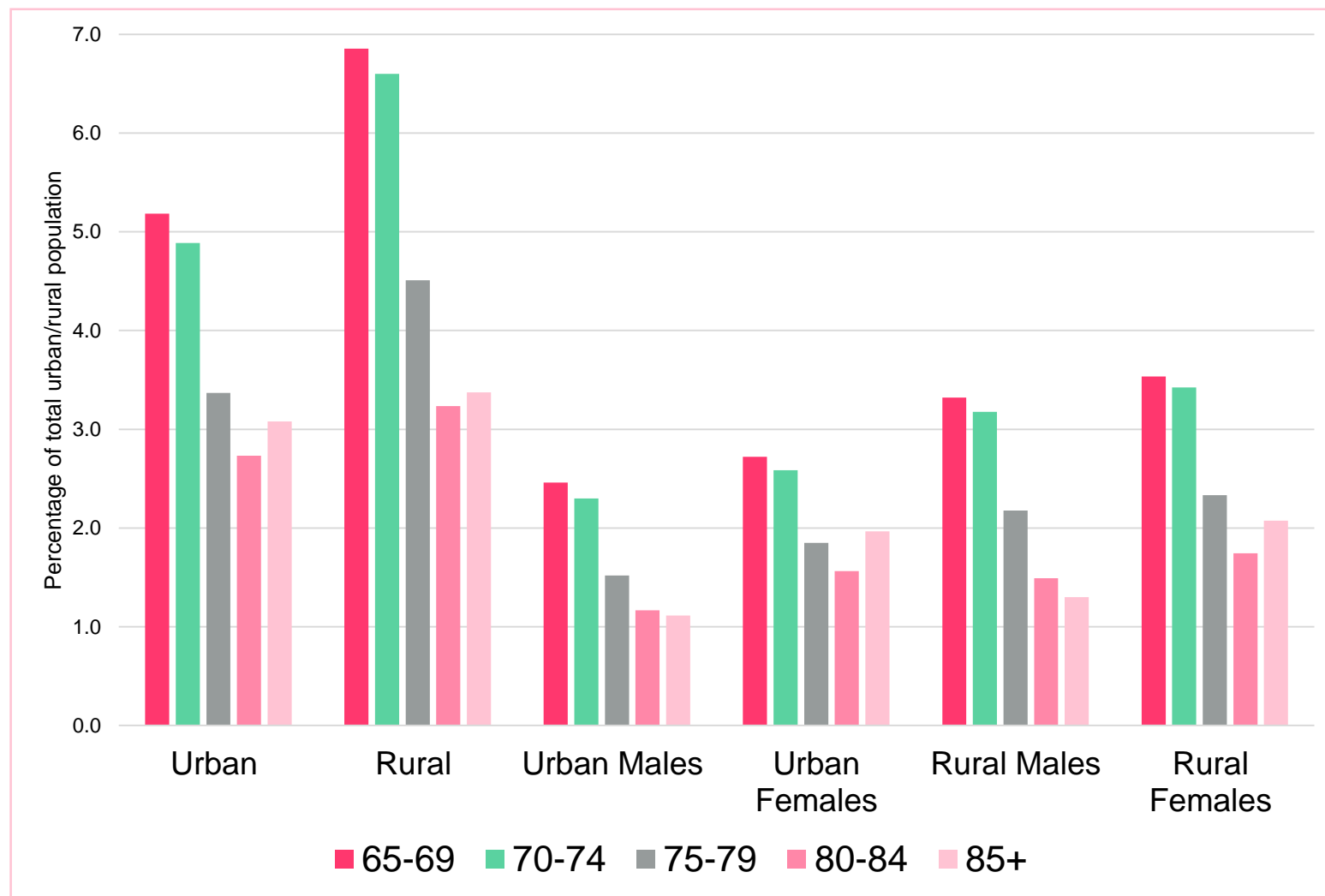


Ageing population

There are significantly more rural residents in the 65-69, 70-74 and 75-79 age brackets but in the over 80s, the disparity is less obvious.

There are more females than males in all the older age groups but, when split by gender, the highest percentages of older people are rural females.

Source: ONS Mid Year Population Estimates 2017



Population growth

The urban population grew at a faster rate than the rural population in Coast to Capital between 2011 and 2017. The urban population increased by 5.47% compared to 4.01% in the rural area.

In both urban and rural fastest rate of growth was in the 70 to 74 age bracket with an increase of 38.96% in Rural Coast to Capital and 32.36% in Urban Coast to Capital.

The Rural area experienced a net decline in population in the 16 to 49 age range, contributing to the faster population ageing in rural areas.

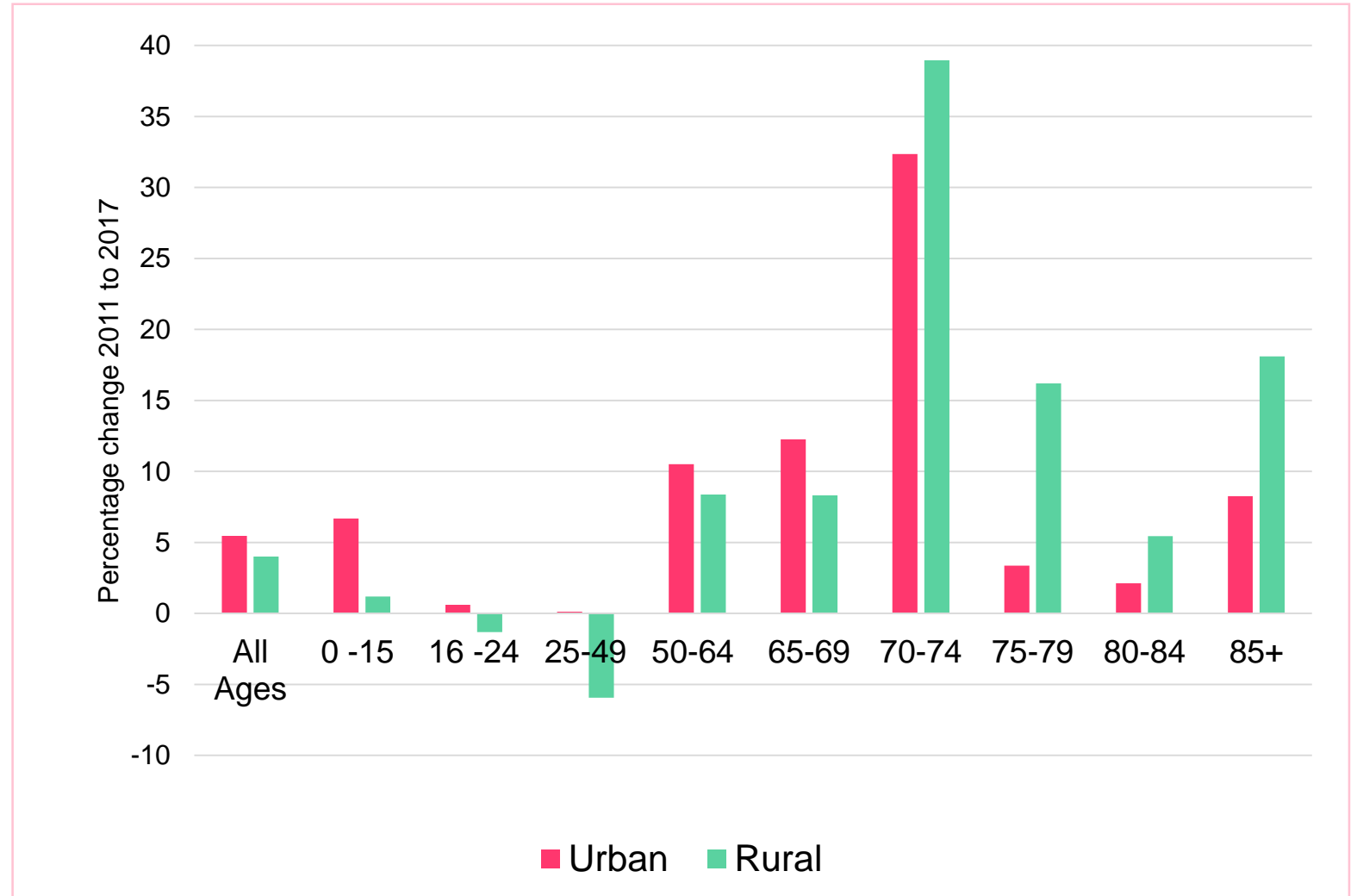
Source: ONS Mid Year Population Estimates

Age	Rural change No.s 2011-2017	Rural %age change 2011-2017	Urban change No.s 2011-2017	Urban %age change 2011-2017
All Ages	9,646	4.01	66,487	5.47
Aged 0 to 15	523	1.20	14,601	6.69
Aged 16 to 24	-279	-1.31	808	0.60
Aged 25 to 49	-4,212	-5.94	488	0.11
Aged 50 to 64	4,386	8.38	22,854	10.50
Aged 65-69	1,317	8.32	7,264	12.27
Aged 70-74	4,628	38.96	15,324	32.36
Aged 75-79	1,572	16.19	1,404	3.36
Aged 80-84	418	5.45	730	2.13
Aged 85+	1,293	18.10	3,014	8.26
Total	28,520		160,710	

Population Growth

The chart illustrates graphically the faster rate of ageing in Rural Coast to Capital compared to Rural Coast to Capital with the rural population aged 70 and above showing significantly higher increases as the “baby boomer bulge” works its way through with implications for demand for housing and social care in the near future.

Source: ONS Mid Year Population Estimates



Coast to Capital Rural Population

Key findings:

- Just over a quarter of a million people or 16% of Coast to Capital's population live in the rural area.
- This is lower than Rural Coast to Capital's share of the LEP's business population, meaning that there are fewer businesses per head than in Urban Coast to Capital.
- Rural Coast to Capital has a lower percentage of people in the under 50 age bracket and a higher percentage in the 50+ age groups than Urban Coast to Capital.
- The gap is particularly significant in the 65 to 79 age group, but less obvious in the over 80s.
- The highest percentages of older people in all age groups are female.
- The population grew by 5.5% in Urban Coast to Capital and 4.0% in Rural Coast to Capital between 2011 and 2017.
- The rural population is growing faster than the urban population in the LEP.
- The fastest rate of growth is in the 70 to 74 age bracket which increased by 4,628 people or 39% in Rural Coast to Capital between 2011 and 2017 as the "baby boomer bulge" works its way through.

Coast to Capital

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Next Steps....

- Rural data added to Coast to Capital's wider LIS evidence base
- Submitted to Government with initial LIS evidence base submission early 2020
- Positive feedback from Government given February 2020
- LIS timeline uncertain following new Government, LIS expected July not March
- Challenge remains to keep rural focus within the final LIS document
- Desire for new, innovation, shiny and urban!

The Challenges!

- Reflecting importance, value and opportunities within rural economy, both nationally and locally
- Ensuring future LEP strategies and plans are fully rural proofed
- Ensuring a fair and proportionate share of any future LEP funding for the rural economy
- Ensuring EU funding replacement UKSPF is rural proofed, ideally with specific rural funds
- Ensuring rural economic growth agenda is not lost by Defra in light of Agri & Env Bills

Thankyou and Questions....

