

East
Surrey

Croydon

Gatwick
360°

West
Sussex

Greater
Brighton

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Chairman's Foreword



I am lucky enough to have been born and brought up in Surrey, and to have spent much of my business career working in the Coast to Capital area. This is a marvellous place which inspires huge passion and loyalty from everybody who lives here and knows it well.

I am proud to have served on the Coast to Capital Board since 2012 and to have been Chairman since 2016. I am very well supported in my role, and would like to thank the Chief Executive and his team, and our many partners in business, education and local government who have played such important parts in developing this Strategic Economic Plan for the whole area.

Gatwick 360° is an exciting plan for our future: a vision for taking our economy to the next level. Our area clearly starts from a very strong place, being the 7th largest local economy in England. With our established and emerging strengths in different business sectors, we offer enormous potential to the future UK economy. But we also acknowledge that our area is not currently performing as well as it should.

Through this plan we aim to address some of the major issues which have slowed our overall growth. We need to provide more business space so that our innovative and successful companies can grow. We aim to provide more highly skilled jobs in our area, to meet the potential of our impressive workforce so that they can be fully productive. We want a local economy which generates enough wealth for people to buy

a home and build their lives in this desirable area. Through strong leadership we can build a stronger identity, so that we get the recognition we deserve as a major part of the UK economy alongside the rest of the South East.

Addressing these challenges will require engagement and commitment from the business community and local political leaders. We can see from other parts of England how a strong vision can build confidence in the future and attract investment in the local economy, delivering a broader business base and higher productivity. It is noteworthy that if our economy had grown since 2009 at the same rate as the Enterprise M3 Local Enterprise Partnership then it would be £3.1 billion (6.2%) bigger than it is now. This encapsulates both our challenge and our opportunity.

We believe that our vision will close this gap, bringing wealth to all our towns and cities based on the success of a strong and growing Gatwick airport as the beating heart of our area. We aim to optimise our economy and to make it central to the delivery of the Government's Industrial Strategy.

The next step is to begin our discussions with Government to turn this plan into a reality. Alongside local government, education and business, Coast to Capital will be proud to lead this work and help to realise the undoubted economic potential of our wonderful area.

Tim Wates
Chairman
Coast to Capital
Local Enterprise Partnership

Introduction by the Chief Executive



In 2014, our first Strategic Economic Plan provided the platform for much-needed investment in our area.

But a fresh look at our approach is needed. Widespread changes in the national and global economy, and the Government's resulting Industrial Strategy, make this the right time to take stock of the state of our own economy. Developed in close consultation with partners across our area, our new plan reflects shared local ambitions in a simple and coherent way.

Gatwick 360° is a direct acknowledgement of London Gatwick airport's place at the geographical and economic heart of our area. Gatwick fuels business, attracting employers, generating jobs and driving commerce from Croydon through Surrey to Brighton and across West Sussex and our coastal towns. Gatwick is vital to London's economy and to the UK's place in an international trade environment, especially as we prepare to leave the European Union. Gatwick links us to global markets and will help deliver the right trading conditions for businesses across London and the wider South East.

But, viewed alongside similar areas of England, our current economic performance gives some cause for concern. While others have pushed on, our area has still not recovered from the drop in output following the 2009 economic crash. Instead, we have become over-reliant on the London labour market, with ever-rising numbers of commuters pushing rail infrastructure to its limits. House prices are amongst the highest in England, and the rush to meet demand is seeing the conversion – and loss – of much-needed business space.

There is momentum building in the English cities that make up the Northern Powerhouse and the Midlands Engine, as well as in other areas such as Bristol-Bath, Woking and Guildford, Basingstoke, Reading and the new Cambridge - Milton Keynes - Oxford corridor. We have no intention of losing any more ground. With this plan, we intend to join other areas that are taking a lead.

Coast to Capital, as an organisation, is well-placed to deliver this vision. Since our creation in 2011 we have provided strong leadership to improve the economic performance of our area. We have an established board with experienced members drawn from the business community, senior political leaders and eminent representatives from the education sectors. We have a good track record of delivery, with project investment of more than £300 million across our area through the Government's Local Growth Fund.

Coast to Capital is an ambitious place, with the potential to make a strong contribution to the growth of the UK economy, to innovation and creativity in business, and to the UK's role as a leading international trading nation. Our Strategic Economic Plan is a statement of clear ambition and action toward 2030, as we prepare to negotiate our Local Industrial Strategy with Government in the coming months.

I hope you will join in our efforts to deliver our exciting plan.

Jonathan Sharrock
Chief Executive
Coast to Capital
Local Enterprise Partnership



The opportunity

Conversations about regional economic growth tend to start with the city regions. Metropolitan identities, large scale economic needs and powerful political influence drive the debate about the primary role of cities in driving the national economy.

The Coast to Capital area does not fit the template. Rather than a single identifiable city region, it is **a network of functional economic hubs**. Each has its own distinct sense of identity, offering a powerful draw for businesses, entrepreneurs and visitors from London, across the UK and the rest of the world.

Many major international brands have their UK bases here, including American Express, Virgin Atlantic, Nestlé, Body Shop and Canon. There are numerous planned investments, innovations and developments over the coming years that will boost our national and international profile. Central Croydon alone is undergoing a £5.25 billion regeneration programme¹. The University of Sussex is at the cutting edge of innovations in quantum computing. Along the south coast, the leisure and tourism industry is experiencing a renaissance, with developments at resorts such as Bognor Regis and Brighton, home to the British Airways i360.

With a total population of two million, our area boasts a strong economy worth £50.7 billion gross value added (GVA), making us the **seventh largest local economy in England** in 2016. **Table 1** below shows the contribution that different towns and areas make to this total, as well as the trend towards higher productivity in those closest to Gatwick airport.

Table 1: Coast to Capital GVA by local authority area

Local authority	GVA (£m)	Labour Productivity
Croydon	£7,727	£20,212
Brighton & Hove	£7,349	£25,407
Crawley	£4,977	£44,691
Reigate and Banstead	£4,302	£29,538
Mid Sussex	£3,622	£24,623
Horsham	£3,573	£25,889
Mole Valley	£3,503	£40,624
Chichester	£3,132	£26,504
Worthing	£2,586	£23,813
Arun	£2,549	£16,235
Tandridge	£2,225	£25,675
Lewes	£2,049	£20,215
Epsom and Ewell	£1,989	£24,994
Adur	£1,169	£18,411
Total	£50,752	£26,202 (our average)

Source: Office for National Statistics, Regional Gross Value Added (balanced) by local authority in the UK, 2017

¹ Source: Develop Croydon, 2018

Functional economic hubs

Croydon is our single largest urban area, integral to our economy, labour market and transport infrastructure. With ambitions to become a Smart City and leading cultural destination, Croydon is home to a growing cluster of pioneering and successful tech businesses which in turn generate innovation across the economy. It has a strong insurance and finance sector and a growing government administration cluster. Croydon is also closely linked to the growing economy around Gatwick airport: 1,000 new airport-related jobs are expected in Croydon by 2025². Major investment in the regeneration of Croydon over coming years will increase its attraction to residents and businesses looking for a more affordable and well-connected place to live and work, with high-quality retail and business space close to both central London and Gatwick airport.

Greater Brighton is one of the fastest-growing city regions in the UK, rated in the top five for jobs growth in the past five years and one of the best places to start a new business. Greater Brighton generates £21.1 billion of Coast to Capital's £50.7 billion GVA. The city of Brighton & Hove sits at the heart of the city region, an internationally recognised destination in its own right. It boasts a strong visitor and knowledge-based economy. Home to the universities of Brighton and Sussex, the city has an entrepreneurial and innovative edge which has led to the emergence of a world-renowned creative and digital tech cluster.

Distinctive and successful towns such as Epsom, Leatherhead, Reigate, Dorking, Oxted and Redhill form a central part of our economic area in **East Surrey**. All offer their own blends of economic activity, including major international business headquarters, clusters of high-value economic activity, such as the equine economy, and a highly-skilled commuting population. Epsom is home to another of our universities, the University of Creative Arts, the UK's top specialist university for the creative industries³. East Surrey is a desirable place for investment and development, with its outstanding natural environment, and plans for future growth building on the established reputation and economic strength of its towns.

The County of **West Sussex** forms the largest part of our area geographically and offers some of the most striking opportunities for growth and development. Areas such as Arun, including Bognor Regis and Littlehampton, have the potential to be future economic hubs with scope for growth and investment, supported by partners including the University of Chichester. Other towns such as Burgess Hill, Horsham and Shoreham are pursuing distinct paths to growth, reflecting their specific circumstances. The county and its cathedral city of Chichester offer significant local attractions, with a growing tourism economy centred around the natural environment.

² Source: Gatwick Growth Board, Connectivity Study, 2017

³ Source: Complete University Guide, 2018

Close links to London. Much of the workforce is well-educated and highly mobile. Every day 202,000 people commute out of our area to work, with 120,000 of these journeying to London⁴, a different economic area in itself. Generations of workers have moved here from London and elsewhere to raise families, start up their own enterprises and retire. Employment is relatively high across our area, but there are significant variations in productivity. This reflects lower skills, lower investment and slower business growth in coastal communities and cities within the area.

The best in international connectivity. International trade is the mainstay of our economy, and London Gatwick airport is the beating heart of business in the Coast to Capital area. A giant of industry and enterprise in its own right, it is central to our plans to unlock future productivity and prosperity for our area as a whole, as Chapter 2 describes.

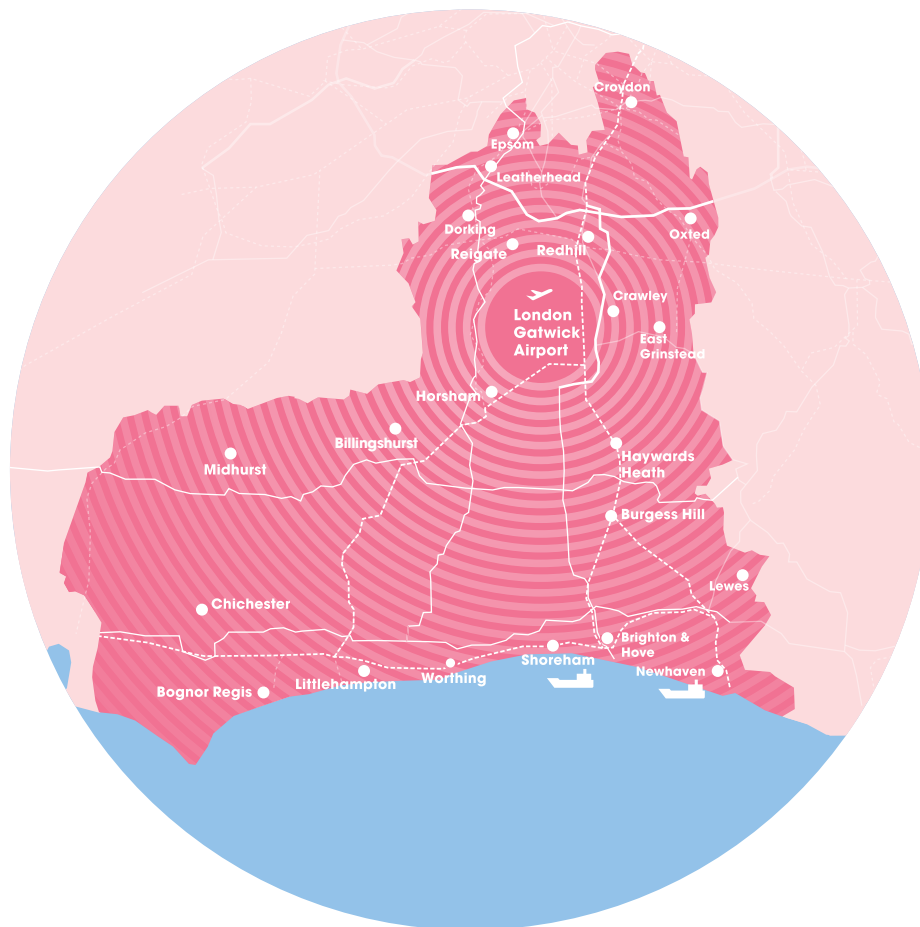


Figure 1: Map of the Coast to Capital area

The Gatwick Diamond, the cluster of towns in East Surrey and West Sussex surrounding Gatwick airport, has a combined economy of £24 billion and 368,000 jobs. It represents a symbiotic economic relationship between the airport and the local area that has grown and developed over 70 years. **Crawley** alone, home to Manor Royal Business Park, contributes £5 billion to the economy and has the eighth highest GVA per head in the UK⁵.

Outstanding culture, heritage and environment. We offer a fantastic mix of city, urban, coastal and rural living. All within easy reach of a world-class natural environment, including the South Downs National Park, the Surrey Hills and Chichester Harbour Areas of Outstanding Natural Beauty. These attractions, along with our proximity to London, are reason enough for many people and businesses to move here.

⁴ Source: Nomis (Office for National Statistics), Census, Method of travel to work, 2011

⁵ Source: Centre for Cities, Cities Outlook Report, 2017

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.

Coastal urban centres

We have a number of urban centres along the south coast, some with strong economies and some which face the kind of economic challenges common to seaside resorts. These centres are sandwiched between the sea and South Downs, and have become increasingly interconnected. The A27 and coastal rail network serve as the main arterial routes, operating beyond capacity but with some advanced plans for improvements to the A27 to the east and west. We see these coastal towns as significant economic assets for our area, with scope to become new economic hubs linked to the Gatwick economy and the Greater Brighton city region.

Newhaven Enterprise Zone comprises eight key development sites in the centre of Newhaven, a port town east of Brighton and part of the Greater Brighton city region. The aim of the Enterprise Zone is to address issues of business space, affordability and suitability which are key issues for the Greater Brighton economy, and act as a catalyst for the wider regeneration of Newhaven.

In **Bognor Regis**, similar opportunities are expected in coming years as a result of the new University of Chichester Engineering and Digital Technology Park and continued growth of the leisure industry around the Butlins resort. The town contains a series of high-potential development sites that can support housing growth, as well as new business capacity and space for innovative new industries.

⁶ Source: Coast to Capital, Rural Statement, 2016

⁷ Source: Coast to Capital, Rural Statement, 2016

⁸ Source: West Sussex Grower's Association, Growing Together – Strategic Plan, 2017

Our competitive advantages

The Coast to Capital area already offers the UK many of the preconditions needed for economic growth, meeting the challenges set out in the Government's Industrial Strategy⁹. The current and potential economic hubs in our area are rich sources of opportunity. But our wider economy offers specific competitive advantages that give us confidence in setting an ambitious vision for growth.



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

1. Connectivity

Our aviation links are outstanding: Gatwick airport is on our doorstep, with London City, London Stansted and London Heathrow airports also nearby. Minor airports such as Brighton City airport in Shoreham and London Biggin Hill airport, close to Croydon, offer further aviation links and hubs for industry. Newhaven and Shoreham ports offer active passenger and freight shipping routes to Europe. The nearby maritime cities of Portsmouth and Southampton further enhance our global connections.

2. Integration

Our economic interests are also served by identifying as part of the wider South East region, across Local Enterprise Partnership boundaries, as seen in **Figure 2**. We already work successfully as part of Innovation South, Transport for the South East and the Greater South East Energy Hub. Two of the London Plan's Growth Corridors and Opportunity Areas¹⁰ – Crossrail 2 and London-Gatwick-Brighton main line – serve our area. We will deliver our strategy in close conjunction with the Greater London Authority and Local Enterprise Partnerships in other parts of the wider South East.

3. Creativity

Our future economy rests on much more than making and exporting physical products, as emphasised by the Industrial Strategy. In 2016, the creative industries were worth more to the UK economy than oil and gas, life sciences, aviation and the car industry combined¹¹. We have enviable success stories to tell in our area, such as the Brighton Creative Cluster which features within the Independent Review of the Creative Industries¹². The combination of digital innovation and growth, coupled with the expansion of our physical gateways, is what gives our area its real competitive advantage.

⁹ Source: Industrial Strategy: building a Britain fit for the future, November 2017

¹⁰ Source: Greater London Authority, London Plan, 2018

¹¹ Source: Creative Industries Foundation, Economic Contribution, 2016

¹² Source: Department for Digital, Culture, Media & Sport, Independent Review of the Creative Industries, 2018

London Gatwick airport – a national asset

At the geographic and economic heart of the Coast to Capital area is London Gatwick airport, the second busiest airport in the UK and the most efficient single-runway airport in the world. As a vital gateway for trade, Gatwick defines the opportunity for growing our area's economy, after we leave the European Union.

Gatwick works...

For customers by connecting markets in our area, in London and the rest of the UK to more than 220 international destinations. The airlines operating out of Gatwick offer global connections for all passengers – from families to business travellers. Gatwick provides direct services to global business hubs in North America, the Middle East, Asia and Europe and hosts a growing share of UK freight traffic.

For a global and connected economy by attracting investment into our area. Many international businesses have based their UK and European operations near the airport, in Crawley and the area's largest business park, Manor Royal, as well as towns and cities such as Reigate, Leatherhead, Epsom, Brighton and Worthing.



Gatwick airport entrance
© Gatwick airport

Manor Royal Business District, very close to Gatwick, is home to more than 500 businesses employing 30,000 people, including blue-chip global brands. Its 240 hectares include headquarters for Virgin Atlantic, CGG, Thales, Varian Medical Systems, Elekta, Vent-Axia, and Doosan Babcock Energy.

For economic growth in our area through employment, development and increased prosperity. The airport directly employs 23,800 people and supports another 60,000 jobs in the wider UK economy. It is our single biggest driver of economic growth, contributing £1.6 billion directly to the Gatwick area, supporting a total £2.7 billion GVA in the Coast to Capital economy¹³ and a total £5.3 billion GVA in the UK economy through wider supply chains.

For innovation, technology and skills that help to keep our area's economy competitive. As the single biggest employment and transport hub in our area, Gatwick is able to innovate in ways which add to our overall competitive edge. These include a new world leading waste processing plan, an electric/hybrid fleet of taxis and the UK's first end-to-end biometrics trial.

¹³ Source: Gatwick Growth Board, The Economic Impact of Gatwick airport, 2017

When it opens in 2019, **Boeing's new £88 million commercial aviation maintenance hangar** at Gatwick will create around 100 highly skilled jobs and support an additional 100 indirect jobs locally. Its first 20 years in operation is forecast to generate £135 million in GVA in the Gatwick area. Its construction alone is supporting 475 jobs and contributing around £80 million of GVA to the local economy.

Gatwick – engine for growth

Our vision for economic success depends on the sustainable growth of Gatwick airport. The reach and importance of the airport gives our area a unique set of opportunities and strengths on which to build our future economy. A vibrant and successful airport is essential for our competitiveness, and will allow us to attract businesses from London and elsewhere to base themselves here. Gatwick is key to attracting investment, driving exports to global markets and nurturing innovation across our different economic sectors. A stronger industrial base in our area, based around the airport, will spread to the coastal and rural economy.

We see three main areas in which Gatwick's continued competitiveness can support the delivery of our Strategic Economic Plan:

1. International connectivity

It is in our area's interest for Gatwick to expand its route network. More flights beyond European markets, including freight as well as passenger transit, bigger planes to increase capacity and continued innovation in the aviation industry will support the Coast to Capital and wider South East economy. Expansion should not be at the expense of the environment. Maintaining or reducing the levels of noise and air pollution generated by the airport are essential to its role within our area. Gatwick has a strong track record in meeting all air quality standards and noise issues overseen by an independent noise management board.

2. Business growth

Gatwick airport is the single biggest driver of economic growth in the area, accounting for £2.7 billion of economic activity in our area¹⁴. Its influence is especially important to the M23 corridor. In Brighton, Gatwick's connectivity and the city's lifestyle attractions have helped an

international digital and creative cluster to develop, capable of drawing global talent. In Croydon, Gatwick's links are vital in attracting employers and investment, supporting ambitious new office, retail and leisure developments. Improved infrastructure and business links to Gatwick will raise the investment profile of coastal places, such as Newhaven, Littlehampton and Bognor Regis.

3. Attracting development

We are encouraging the planning and strategic authorities around Gatwick to cooperate and collaborate in maximising the economic potential of the site. The airport sits close to the boundaries of six local planning authorities and two county councils and it is also a key factor in national strategic investment decisions by Network Rail and Highways England. The airport itself is a major investor in infrastructure. The excellent public transport and road connectivity for the airport, and the lack of planning constraints on much of the land around it, make it an ideal anchor for further development of business space and housing, both of which are in acute demand in our area. This is not just true for Crawley, which has benefitted for decades from the growth of the airport, but for other places close to the airport.

¹⁴ Source: Gatwick Growth Board, *The Economic Impact of Gatwick airport*, 2017

Our economic vision

Our historic strengths and modern competitive advantages allow us to be optimistic in our vision for the local economy.

"Our vision by 2030 is for our towns and cities to be known around the world as fantastic places to live, to grow and to succeed. We will become the most dynamic non-city region in England, centred around a highly successful Gatwick airport."

By 2030, our area will be more prosperous than it is now, having caught up with our competitors. Our major urban centres – Brighton & Hove, Croydon and Crawley – will be ranked alongside the most productive places in the UK. Our successful towns will be on a path to greater prosperity, reversing the creeping trend of becoming dormitory towns for London, and building the facilities for growing businesses which bring high quality jobs to local people. We will have enhanced connectivity across the area, including digital connectivity. We will have established a clear model of sustainable growth and investment across our area, including natural capital.



Shared workspace in Brighton
© Platf9rm

By 2030, we will be delivering the necessary skills for a global economy that is based on international trade and technological innovation. New business space and investment will have consolidated key companies in growing sectors that are already found in our area, and which have the potential to provide high-quality, well-paid jobs in the decades to come. The crisis of housing affordability will be tackled with a supply of housing that can accommodate a working population alongside an increasing number of people who do not work.

All of this requires parallel investment in infrastructure, to maximise the competitive advantage of our proximity to London and Gatwick's international links. We should maximise the opportunities to bring private

investment into our area, including from overseas, as well as public investment from the UK Government. We should develop a stronger identity as a business destination as part of the wider South East, which contains some of the UK's most highly-regarded academic and innovation assets.

Our economic vision will lead the Coast to Capital area in addressing the challenges that are summarised over the page and described in full in **Chapters 4 to 6**.

Our economy at a glance

The Coast to Capital area has a historically strong economy. We are the 7th largest Local Economic Partnership (LEP) economy in England out of 38 LEP areas



Our economic growth has been in continued decline and is not recovering from the economic crisis like some comparable LEP areas. Our labour productivity peaked in 1999



Total output in the city regions is growing much faster than ours. We are only the 24th fastest growing LEP area



There is also a clear productivity gap between places within our own area. Our labour productivity is two and a half times higher in Crawley than in Arun



What is behind our slower growth?

We are over reliant on the London economy to provide employment opportunities for our area. Wages are, on average, a third higher in London than locally



This places pressure on our transport infrastructure which wasn't designed for this level of commuter travel. 10% of our working age population travel to London each day for work



The higher wages brought into our area raise living costs, making it less affordable for those who work locally. House price affordability is up to twice as high as the national average



There are pockets of low skills, along the coast and in Crawley and Croydon. The percentage of the population with a degree level (or equivalent) qualification is twice as high in Epsom than in Shoreham



Businesses are not growing. Employment in small and medium businesses in our area is 10% lower than compared to the best performing LEPs



Businesses do not have the space they need to grow. An estimated 15% of business space has been lost in major urban areas to residential conversion since planning laws were relaxed



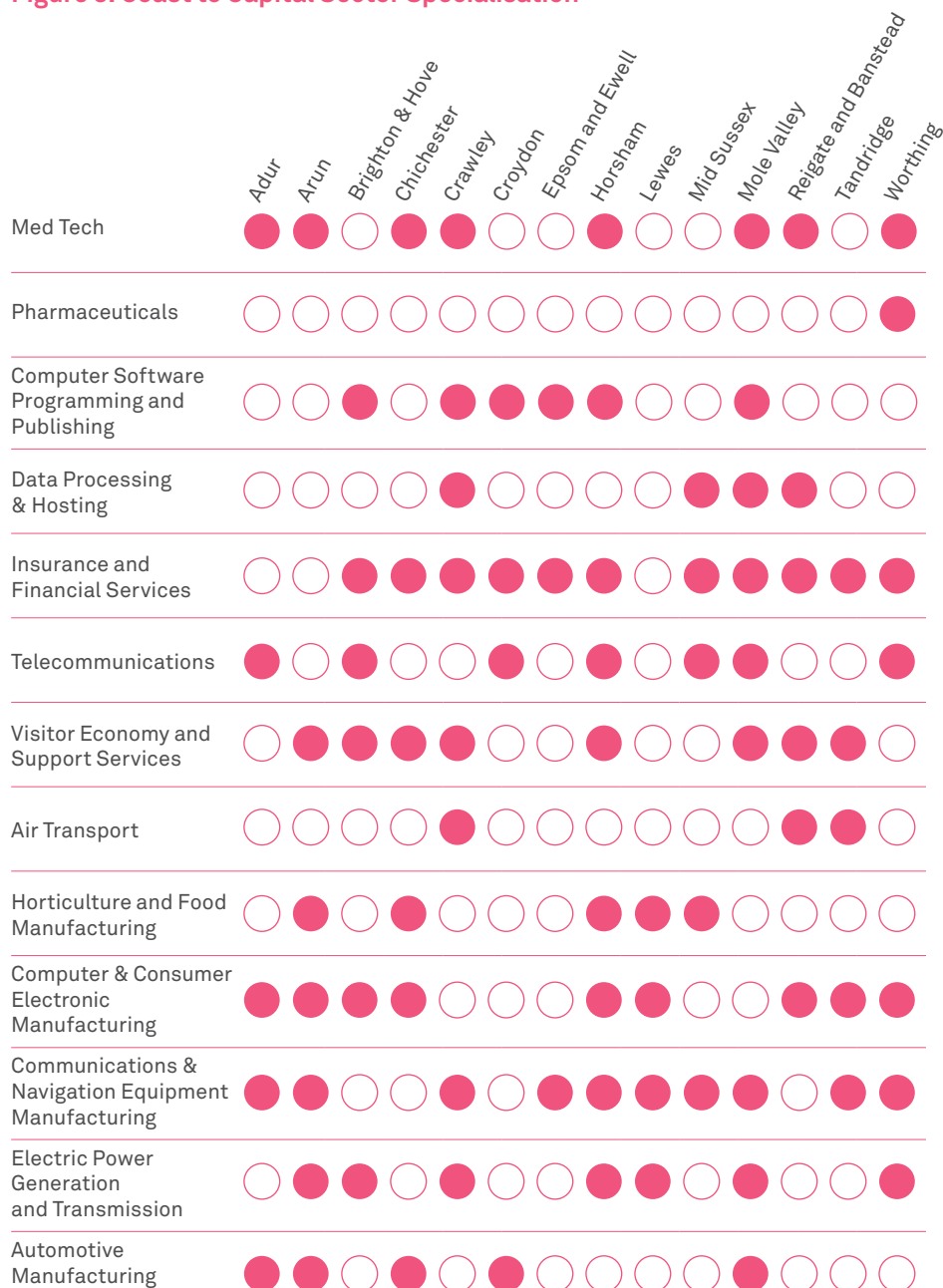
More detailed analysis of our economy is provided in Chapters 4 to 6

Sector spotlight

Our analysis reveals that our future economic strengths lie in a range of economic sub-sectors in distinct, localised areas, as seen in **Figure 3**, rather than a smaller number of broad sectors across the whole area.

We plan to carry out more work with partners to understand what the specific opportunities are for growth in each of these sub-sectors, and what kind of investment is needed to unlock their potential and boost our overall productivity.

Figure 3: Coast to Capital Sector Specialisation



More detailed analysis of our sectoral strengths is provided in **Chapters 4 to 6**

Source: Office for National Statistics, UK Business Register and Employment Survey, 2016

Eight economic priorities

Taking a lead

The Government's Industrial Strategy is clear: Local Enterprise Partnerships are expected to play a lead role in developing Local Industrial Strategies. Putting our Strategic Economic Plan into action will allow us to lead growth across the area, in partnership with local stakeholders, the wider South East region and the Greater London Authority.

In the six years since Coast to Capital was formed, we have successfully invested more than £300 million of public money in local infrastructure, and generated a significant return in the growth of the local economy. Now, our focus is to identify further, major investments that can address the economic challenges we face and lay the foundations for future prosperity.

This chapter sets out the heart of this Strategic Economic Plan: eight key economic priorities that make up our programme for growth.

It starts with a summary of our initial negotiating points for the Local Industrial Strategy. These are specific actions with the potential to make the greatest difference to our economy.

Figure 4: Our Economic Priorities and the Grand Challenges

Coast to Capital Economic Priorities	Industrial Strategy Grand Challenges			
	Artificial intelligence	Clean growth	Mobility	Ageing society
Priority 1: Deliver prosperous urban centres	○	●	●	●
Priority 2: Develop business infrastructure and support	○	●	●	○
Priority 3: Invest in sustainable growth	○	●	●	●
Priority 4: Create skills for the future	●	●	●	●
Priority 5: Pioneer innovation in core strengths	●	○	●	●
Priority 6: Promote better transport and mobility	●	●	●	○
Priority 7: Improve digital network capability	●	●	●	○
Priority 8: Build a strong national and international identity	○	○	○	○

Source: Department for Business, Energy & Industrial Strategy, *Industrial Strategy: building a Britain fit for the future* (p32), 2017

Delivering the priorities

We will develop a more detailed action plan to deliver the Strategic Economic Plan later in 2018/19, in view of the outcome of Government's Local Enterprise Partnership (LEP) review and a greater understanding of the future resourcing of LEPs through the forthcoming Local Industrial Strategies.

In some cases, specific projects can already be identified against the priorities, where clear business cases are already being developed to deliver what our area needs. In other cases, further work is needed to develop these proposals.

Figure 4 shows how each of our eight priorities broadly align to the four Grand Challenges described in the Industrial Strategy.

Economic Priorities

Initial negotiating points for the Local Industrial Strategy

	Deliver prosperous urban centres	We will identify a shortlist of towns and localities with ambitions for transformational development and economic growth, prioritising funding for them.
	Develop business infrastructure and support	We will seek funding to develop high quality business space so that productive businesses can flourish here and bring better paid jobs to the area.
	Invest in sustainable growth	We will be the partner of choice for investment in environmental capital, supporting delivery of the 25 Year Environment Plan ¹⁵ . We will prioritise development of regional strategies for energy, waste, water and low emission vehicles so that ours is a truly sustainable economy.
	Create skills for the future	We will seek funding for training opportunities and high quality training facilities to make sure that the adult workforce has the skills for future business needs.
	Pioneer innovation in core strengths	We will establish a stronger university presence across our area; particularly to bring a new University focus on business innovation in high growth areas such as the Gatwick Diamond and Croydon.
	Promote better transport and mobility	We will lead lobbying for investment in a state of the art digital railway through investment in the Brighton main line and Crossrail 2. We will actively support the creation of Transport for the South East to bring further funds to roads and railways across our area.
	Improve digital network capability	We will prioritise investment in a new standard of full fibre broadband connectivity between our economic hubs, to make us the first area of the UK with full 21st century fibre infrastructure.
	Build a strong national and international identity	We will lead development of a strategy for increasing international and domestic investment in our area, reflecting the business strengths, natural environment and cultural offer.

¹⁵ Department for Environment, Food & Rural Affairs, A Green Future: Our 25 Year Plan to Improve the Environment, January 2018

Priority 1



Deliver prosperous urban centres

Our advantage

Our urban centres, which include vibrant cities and a constellation of successful towns, are all highly sought-after as destinations within easy reach of London and other economic centres, such as Gatwick.

Our ambition

We need to develop a more sustainable economic base for our area. This means reducing our dependence on London and ensuring that all of our urban centres can grow and prosper sustainably, with a good supply of housing and business space.

This will include:

- the delivery of high-quality, locally-distinctive mixed-use schemes based on good urban design
- innovative new housing that offers a range of tenures and rent levels, supports mid and low-income households, first-time buyers and downsizers, and is accessible to workers in key sectors of the economy and public services
- places for people that encourage social interaction and mixed communities

- places connected by highly sustainable transport links with a low carbon footprint and low land usage that allow for more efficient movement of people and goods within and between local areas
- rejuvenated local economies that add vitality and commerce to neighbourhoods, towns and cities, and make high quality landscape, recreation, heritage and culture more accessible

Our challenge

Our area's popularity brings with it a significant challenge. Skilled people have moved to and settled in the area in large numbers. We need to ensure that people of all backgrounds and skill levels have a fair chance to train, live and work in the area. Limited housing supply and restrictions on space for new development have fuelled house price inflation. The increasing flow of commuters has added to congestion on roads and railways. Growing and ageing populations have increased pressure for jobs, education, health and other services.



Priority 1



2018-2020

**Work that Coast to Capital will
lead in preparation for a
Local Industrial Strategy**

Establish a priority list of urban centres with a clear vision for sustainable economic growth and prosperity.

Develop a business case for dedicated Government funding to deliver this vision.

Support regeneration work to deliver local plans across the area, helping to attract direct and indirect funding to increase housing numbers.

Intensive support for local authorities and developers to resolve issues as part of delivering local plans.

Close work with all partners, particularly Homes England, to identify opportunities to meet Government housing targets.



2020-2030

**Delivering our vision
out to 2030**

Create exemplars for the development of existing towns as an engine for economic growth.

Support the creation of new communities and campus-based development, prioritising growth around Gatwick and the development of new economic hubs on the coast.

Promote the economic importance of regeneration and housing development through active support to local planning authorities in preparing Local Strategic Statements.

Support innovation in housing supply including the need for more housing options for different life stages.

Priority 2



Develop business infrastructure and support

Our advantage

The benefits to business of having a base in our area, in terms of quality of life and connectivity, are clear. The demand for business space outstrips supply; the strong sub-sectors in our economy make this a great area for local companies to expand and for new businesses to put down roots.

Our ambition

Our ambition is to develop more flexible, high-quality, sustainable enterprise space, to remain attractive to existing businesses and the industries of the future. To encourage innovation we need smaller-scale incubator, maker and start-up spaces, and to provide room for growth we need more and better office and industrial space.

We believe a two-strand approach is the answer. Existing business space can be improved to help attract high-value business into the area. Alongside that, there's a demand for new, high-quality business and science parks that can build on our sector strengths and encourage strong business clusters.

As well as space, businesses need support. To boost ambition, we need to offer continued support and advice, with a particular focus on exporting, access to finance and leadership and management.



Manor Royal roundabout
© Manor Royal

Our challenge

The provision of business space in our area has been hit by the relaxation of Permitted Development Rights to convert commercial space into residential. The private ownership of many business parks can also mean a lack of coordinated strategic direction in providing the space businesses need – a situation made worse by the lack of means for local authorities to invest in business parks. More work is needed to understand where our strengths and weaknesses in business space lie across the area.

Priority 2



2018-2020

**Work that Coast to Capital will
lead in preparation for a
Local Industrial Strategy**

Carry out a study into business space availability and barriers preventing the development of new space in the area.

Identify new and existing sites for investment to bring forward high quality business space for a variety of different needs.

Secure additional funding through the Local Industrial Strategy and private investment to support delivery of business space in our area.

Carry out a review of existing funding, including our Growing Places Fund, to maximise the support available for developing business space.

Increase support to scale-up and growth potential businesses, through investment in our Growth Hub and other support services.

Develop a co-ordinated approach to business export support across the area.



2020-2030

**Delivering our vision
out to 2030**

Actively support delivery of business space for the area, including through statutory and market-led frameworks and incentives.

Develop ways to match business growth to long term investment, such as Foreign Direct Investment and business rate retention.

Prioritise the growth and development of medium-size businesses in the area through active support and promotion, including export potential.

Priority 3



Invest in sustainable growth

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.

Our ambition

Our ambition is to develop a model of sustainable growth for the area. All new development will come with an equivalent investment in natural capital, prioritise the production and use of renewable energy, reduce the demand on water and minimise the amount of waste generated.

Investment in our natural capital will not only unlock land for public and private-sector investment but also extend and enhance our natural assets.

Our challenge

Protection of our natural assets means that land available for development in our area is limited. Conventional models of city-based growth, which rely on large scale urban development, will not apply. We need to develop a model of prosperity and growth which works for our area.



Solar Farms
© West Sussex County Council



2018-2020

**Work that Coast to Capital will
lead in preparation for a
Local Industrial Strategy**

Identify the areas which will benefit most from environmental investment in order to support economic growth.

Be an active partner to Government in the development of the 25 Year Environment Plan and to promote the importance of natural capital in our area.

Finalise the Energy South2East strategy (Coast to Capital, Enterprise M3 and South East Local Enterprise Partnership) and continue supporting the development of the Greater South East Local Energy Hub.

Investigate what is needed to create a regulated market place for investment in natural assets and services.

Bring together local authorities, utility providers and neighbouring Local Enterprise Partnerships to identify potential for development standards for water and waste use and management.



2020-2030

**Delivering our vision
out to 2030**

Develop green infrastructure policies to help pilot Government priorities, including low carbon design, and consider how to apply them to proposed major developments in the area.

Implement the recommendations from the Energy South2East strategy.

Support low-carbon growth and innovation through knowledge transfer from our area's universities.

Agree development standards for waste and water use and management.

Priority 4



Create skills for the future



Brighton MET College
Construction & Trades Centre
© Brighton & Hove County Council

Our advantage

Our area can boast one of the most highly skilled populations in the UK, with 44.6% of people holding a degree-level qualification, 6% higher than the national average¹⁶. The pipeline of talent is fed by four universities, seven further education colleges and a wide mix of independent training providers. And strong partnership working between education and business is set to serve as a springboard for future activity.

Our ambition

Our ambition is to boost the productivity of our economy by giving people the skills they need not only to secure and maintain high-quality jobs, but also to make their way through a potential portfolio of careers over their lifetime, earning an income that allows them to remain living within the area. This should be accessible to everyone, regardless of location, age, gender, skill level or ability.

To do this we will form a Coast to Capital Employment and Skills Board, to build strong partnerships between education and skills providers and employers and to ensure that delivery matches the changing requirements of industry, with a particular focus on STEM, digital and basic skills.

We need a further education sector that can adapt quickly to the changing requirements of the economy and local business needs. We will aim to bring capital investment into further education that can keep facilities and equipment modern and up-to-date, and encourage employers to take a greater role in training the further education teaching workforce.

In order to up-skill and re-skill the adult workforce, we are seeking national revenue investment, as a way of subsidising investment in training made by employers and individuals.

We will take a greater role in co-ordinating all age careers advice and raising the aspirations of young people, particularly around Apprenticeships and T Levels, as well as supporting the development of the adult workforce and retention of the older workforce.

Our challenge

Our area's economy will evolve significantly in the next few years, shaped by new technology, the growth of new businesses, and an ageing working population. Our challenge is to prepare for this future disruption, particularly where there is a shortage of relevant skills, such as in Crawley, Arun and Adur, and where the skills of the existing workforce are out of date. Our area is typical of many, in needing to anticipate and invest in a strategy to change attitudes and approaches to skills development among employers, workers and parents.

¹⁶ Source: Office for National Statistics, Annual Population Survey, 2017



2018-2020

**Work that Coast to Capital will
lead in preparation for a
Local Industrial Strategy**

Form an Employment and Skills Board to ensure that education and skills delivery match the changing requirements of industry.

Ensure that careers advice fully exposes young people to the specific opportunities within the local economy, in line with the Government's careers strategy.¹⁷

Build an accurate picture of the skills needed in our economy over coming years and the capital investment needed to support their delivery.

Build a business case for revenue funding to subsidise the training of the adult workforce.

Prioritise the development of digital skills across the economy, including for older workers.

Actively support initiatives to improve skills provision, including an Institute of Technology, the introduction of T Levels, reinforcing existing provision and creating new provision where there is urgent need, such as Haywards Heath.

¹⁷ Department for Education, Careers strategy: making the most of everyone's skills and talents, December 2017



2020-2030

**Delivering our vision
out to 2030**

Broker positive relationships and new ways of working between education and industry to ensure that individuals and business can access high quality skills training.

Build a business case for capital investment in skills infrastructure to ensure we have state of the art training facilities and equipment.

Take a greater role in the co-ordination of careers advice for all ages, in line with the Government's careers strategy.

Co-ordinate the digital skills offer through a Local Digital Skills Partnership.

Priority 5



Pioneer innovation in core strengths

Our advantage

One of our area's core strengths lies in the dynamic creative and digital industry clusters of Brighton and Croydon. Highly innovative micro, small and medium-sized businesses are now spreading in number along the coastal strip to Bognor Regis, and in the towns surrounding Gatwick.

The support for innovation is strong across the area, in the university presence along the coast, the Sussex Innovation Centre which has recently expanded to support the growing tech economy in Croydon, and in the networks of innovative medium-sized and larger businesses in the Gatwick Diamond and along the coast.

Businesses also benefit from access to the latest technology through the Digital Catapult Centre Brighton, and the only 5G test bed in the country found outside a university, also based in Brighton.

Our ambition

We want to create the economic conditions for innovation to continue to flourish, by taking advantage of our proximity to London and the Cambridge - Milton Keynes - Oxford corridor, as well as the key role we play in Innovation South.

We will need to invest in the existing research strengths of our universities and support them to build essential partnerships with ambitious businesses. We are strongly behind the creation of

a higher education presence in Croydon or the Gatwick Diamond, to strengthen the research and innovation opportunities in those areas.

5G connectivity needs to be rolled out from its test bed to the wider Brighton & Hove area, and then to other key locations such as Gatwick airport. To help our ambitious digital and creative businesses to commercialise new technologies we need to provide them with access to a highly-skilled workforce and capital funding. We also need to support them in building partnerships with big businesses and in accessing essential technology and maker space.

Our challenge

Many of our micro, small and medium sized businesses face challenges in accessing the equipment needed to meet their potential, such as the difficulty of securing investment capital. Access to a skilled workforce is another challenge, which risks being exacerbated by our departure from the European Union. In some parts of our area, there is little higher education presence which can severely limit the ability of micro and small businesses to scale up their ideas and access the workforce and equipment that they need.



Priority 5



2018-2020

**Work that Coast to Capital will
lead in preparation for a
Local Industrial Strategy**

Create a 'New University' task group to explore the best way to increase higher education research presence in the Gatwick Diamond or Croydon.

Support the expansion of the Sussex Innovation Centre to widen the reach of expertise and support to businesses and science parks.

Support the growth of immersive technologies and of 5G connectivity through the expansion of the Digital Catapult Centre Brighton.

Provide business support and access to finance to innovative growth potential businesses through the Growth Hub and other initiatives.

Actively support the development of an Innovation South Strength in Places Fund bid to support the development of existing research strengths into commercial opportunities.



2020-2030

**Delivering our vision
out to 2030**

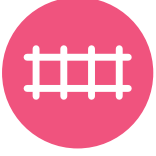
Support the development of innovation in our sub-sector strengths and in line with the specialisms identified in the Innovation South Science and Innovation Audit.

Identify additional opportunities to grow the network of innovation centres.

Support the development of business incubation, maker and innovative work space for emerging tech companies.

Develop a capital fund to support tech companies to expand.

Priority 6



Promote better transport and mobility

Our advantage

There is much to be said for our transport links: we are close to London, plugged directly into the rest of the world via Gatwick, and our towns and cities are connected by existing transport networks that fuel their economic activity.

Our ambition

But, if our economy is to grow, we need a transport network that supports faster, more reliable, and less polluting journeys for business, leisure and freight travel.

We aim to bring about long-term increases in railway capacity, particularly on the Brighton main line, which links our whole area, through a state-of-the-art digital railway providing excellent transport links across the area and into London.

To cut congestion on our roads and improve air quality we want to help bring about a significant reduction in the number of car journeys, a modal shift to public transport and a big swing towards the use of zero-emission vehicles and other sustainable transport options.



Thameslink train at Three Bridges Station

Our challenge

Our international transport links are very strong, but our wider transport infrastructure needs further investment to improve our links to London, to international gateways, along the coast and between our main centres of economic growth.

The quality of the area's rail services is a well-documented and ongoing issue, but the upgrade of major transport corridors, including the A27 and M23/A23, is also pressing.

At a local level, particularly in East Surrey and West Sussex, there are specific challenges on how to link economic hubs better to wider markets, such as the need for better and more resilient road and rail links between the east and west of our area, and to Heathrow airport.

Meanwhile, on our roads, the over-reliance on single-occupancy car journeys for the daily commute continues to add to congestion and unacceptable levels of air pollution.

Priority 6



2018-2020

**Work that Coast to Capital will
lead in preparation for a
Local Industrial Strategy**

Build a strong area-wide consensus in support of the growth of Gatwick airport within its existing capacity.

Continue our area-wide campaign for investment in the Brighton main line at Croydon.

Help Transport for the South East in its bid to become a Sub-national Transport Body and to develop a transport strategy for the wider region, advocating for projects relevant to our area.

Strongly support the development of Crossrail 2, which will support growth in Epsom and East Surrey.

Develop opportunities for piloting and roll out of zero-emission vehicle infrastructure.



2020-2030

**Delivering our vision
out to 2030**

Strongly support the growth of Gatwick airport, within its existing footprint, in line with the Government's aviation strategy¹⁸.

Bring investment into physical and digital railway infrastructure for regeneration and economic growth.

Bring investment into transport and transport connectivity in the South East region as an active member of Transport for the South East.

Support and invest in the wider roll-out of new zero-emission technology and autonomous vehicles to maintain the area's competitiveness.

¹⁸ Beyond the horizon - the future of UK aviation: next steps towards an aviation strategy, April 2018

Priority 7



Improve digital network capability

Our advantage

Digitally, we are a well-connected part of the UK. We have enjoyed good investment in our superfast broadband capability over recent years, with major urban centres served well, even though gaps still exist in rural areas.

The focus is now on full-fibre networking across our area. There are pilots for the Local Full Fibre Networks programme, delivering fibre infrastructure using public sector anchor tenancy, well underway across West Sussex and elsewhere. In the railway industry, fibre infrastructure is being laid down on the Brighton main line to support the delivery of a digital railway.

Our ambition

Our goal is to deliver the kind of world-class digital network capability that can help deliver high productivity gains across all sectors of our economy.

We aim to help establish a new full-fibre network across the area, and bring new development opportunities to all communities. Based on the geography of the Brighton Mainline, it will make railway stations unique hubs not just for local connectivity but for a different type of development. The widespread adoption of 5G connectivity across Brighton and

then out to other key locations, using railway lines where possible, will support innovation and business growth. Connectivity on this scale has the potential to change the way that businesses operate in our area, reducing carbon and congestion, improving accessibility to services, and lowering costs for start-up businesses.

Our challenge

The challenge is to build Government support for wholesale adoption of full-fibre broadband, and connect initiatives across transport and digital policy, along with areas such as urban regeneration. It is important that rural connectivity is also improved, both in terms of broadband (full coverage and superfast to support the rural economy) and mobile connectivity, to promote economic capacity across our area.



Shared workspace in Brighton © Platf9rm

Priority 7



2018-2020

**Work that Coast to Capital will
lead in preparation for a
Local Industrial Strategy**

Coordinate an ambitious bid for the Wave 3 Local Full Fibre Network Challenge Fund working in partnership with Local Authorities and neighbouring Local Enterprise Partnerships where appropriate.

Establish a 5G fibre ring around Brighton & Hove to extend the reach of the existing 5G testbed.

Work with mobile providers to ensure they identify 'not-spots' and to prioritise full coverage.

Support the development of the Brighton main line as a digital railway.



2020-2030

**Delivering our vision
out to 2030**

Use this new infrastructure, big data and communications technology to support the growth of Smart Cities and smart connectivity across our economic hubs.

Use the Digital Railway Infrastructure to extend the reach of full fibre networks and deliver ultrafast broadband to our innovative urban centres.

Support the development of railway stations to become hi-tech business hubs using the broadband connectivity potential of Brighton main line.

Lead efforts for a wider roll-out of 5G technology.

Priority 8



Build a strong national and international profile

Our advantage

There is a lot to draw people to our part of the world from across the UK and beyond. We are close to London, to the continent and, via Gatwick, to global destinations. The attractiveness of our area as a place for people to live, work and visit is well-known.

Our ambition

By doing more to focus our work on attracting domestic and Foreign Direct Investment in our area, we can help provide a major boost to the visitor economy and achieve our vision for economic growth.

To do this, we will explore good practice in other Local Enterprise Partnership areas, identify commercial opportunities for investors, make sure we are account managing key strategic businesses in the area as effectively as we can, and seek to remove any barriers that exist to promote ourselves more effectively on the world stage.

We will also coordinate work with active partners in inward investment and tourism, to establish an alliance of organisations focussed on developing a strong brand proposition.



Gatwick airport © Gatwick airport

Our challenge

Our counties, cities and towns have developed their own, independent local brands which have acted as an effective draw for visitor economies and inward investment. But these are not coordinated across the area and lack the resources available to larger city regions elsewhere in the UK.



2018-2020

**Work that Coast to Capital will
lead in preparation for a
Local Industrial Strategy**

Identify relevant gaps in our business infrastructure which hold back domestic and Foreign Direct Investment in the area, such as conference facilities and hotels.

Work with partners to develop a strategy to promote trade and Foreign Direct Investment in the area.

Develop a coordinated approach for the area to domestic and Foreign Direct Investment enquiries.

Strengthen our relationship with the Department for International Trade to give a significantly higher profile to the excellent assets and investment opportunities within our area.



2020-2030

**Delivering our vision
out to 2030**

Identify and resolve funding or planning barriers to the delivery of business infrastructure that the area needs.

Develop an international reputation as one of the most attractive UK investment destinations, working with local partners and the South East region.

Agree and deliver Foreign Direct Investment targets, in conjunction with the South East region and in-line with Government policy.

Our economy



Economic output

The Coast to Capital economy is worth £50.7 billion to the UK, making it the 7th largest Local Enterprise Partnership (LEP) economy. However, comparisons with other areas illustrate that our growth levels are lower than most and the area's Gross Value Added (GVA) per head relative to the UK average has declined steadily since 1999, as seen in Figure 5.

Since 1998, output has grown more slowly than the majority of other LEPs, ranking us 24th out of 38. Analysis by the University of Sussex¹⁹ has shown that productivity has stagnated in real terms since 2008 when GVA per hour (the most precise measure of labour productivity) was £34 and is now £33.5.

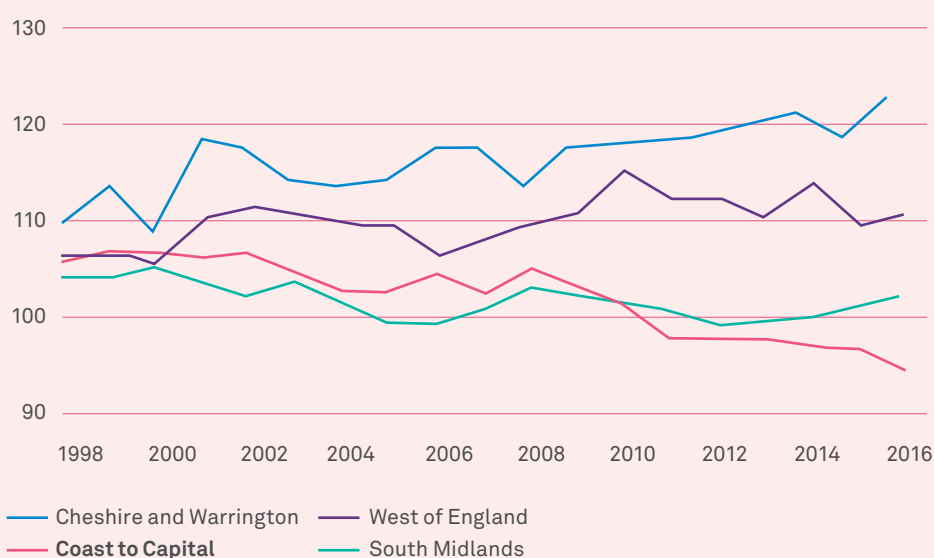
The analysis also shows that although Coast to Capital exceeds national productivity benchmarks, it is still less productive than comparable LEP areas. These are also close to big cities, contain a mixture of towns and urban areas and have a strong rural and leisure economy, as seen in Figure 6 opposite.

Figure 5: Coast to Capital GVA per head (indexed to the UK), 1998-2016



Source: Office for National Statistics, GVA for Local Enterprise Partnerships, 2017

Figure 6: Comparator LEPs GVA per Head (indexed to the UK), 1998-2016



Source: Office for National Statistics, GVA for Local Enterprise Partnerships, 2017

¹⁹ Source: University of Sussex, A comparison of Coast to Capital with comparator Local Enterprise Partnerships, 2018

Economic output also varies significantly within the area. The area's economy is predominantly driven by the M23 corridor running from Gatwick to Croydon. As seen in **Table 2**, the productivity levels of Brighton & Hove, Lewes, and the coastal strip of West Sussex are significantly below Coast to Capital and national levels²⁰. This serves to highlight the economic disparities between the northern half of the area and the southern half.

Table 2: Coast to Capital productivity levels in the Coast to Capital area, 2016

Area	GVA per hour worked (£)
East Surrey	38.2
Croydon	36.1
West Sussex (North East)	34.8
Coast to Capital	33.5
West Sussex (South West)	31.6
Brighton & Hove	30.7
East Sussex	30.3

Source: Office for National Statistics, Regional and sub-regional productivity in the UK, 2018

The labour market

A similar picture is found in analysis of our labour market. The Coast to Capital area has overall record high employment rates, standing at 78.8%²¹ in 2017 compared to 74.4% nationally, and record low unemployment rates, 3.9% compared to 4.9% nationally. These are some of the best rates in the country and compare well to neighbouring LEPs. This growth in employment has been driven by our flexible labour market which has seen an increase in part-time work that is higher than the national average.

This overall figure does contain a significant variation at local level. Average employment rates for 2017 are above the national rate in all local authority areas. Towns such as Crawley (with an 89.1% employment rate) have among the very highest levels of employment in the country. But there is still room for improvement in Arun and

Brighton & Hove where employment rates are just above 74%, in line with national rates. Furthermore, in Croydon and Brighton & Hove there are unemployment rates 2% higher than the national average. There is still significant scope for increased employment in these labour markets.

Beyond the unemployed who are actively looking for work there are 18% of the working age population who are economically inactive across the area²². This is lower than the national average but still represents a significant proportion of the population. In some areas such as Mole Valley, Epsom and Ewell, Brighton & Hove and Chichester the rate is over 20%.

This population is diverse. Some people who are not working may not be close to the labour market, but others would be able to enter the workforce with the right support. In fact 29% of those who are inactive

in our area are reported to want a job²³. The area has higher than average numbers of early retirees, making up 15% of economically inactive, 25% are looking after family, 20% are students, and 22% are long term sick.

Skills

The Coast to Capital area has a higher skilled population compared to the South East and nationally. Since 2004 the population with NVQ4+ qualifications (degree level or equivalent) has risen from 31% to 44.6% in the Coast to Capital area²⁴. Conversely the percentage of the population with no qualifications has fallen more than half to 4.5%. Taken at a broad level this would appear to give the area a competitive edge in terms of its workforce, their productivity, and the attractiveness for business locating here.

²⁰ Source: Office for National Statistics, Regional and sub-regional productivity in the UK, 2018

²¹ Source: Nomis (Office for National Statistics), Annual Population Survey, Labour Supply - Employment and unemployment, 2017

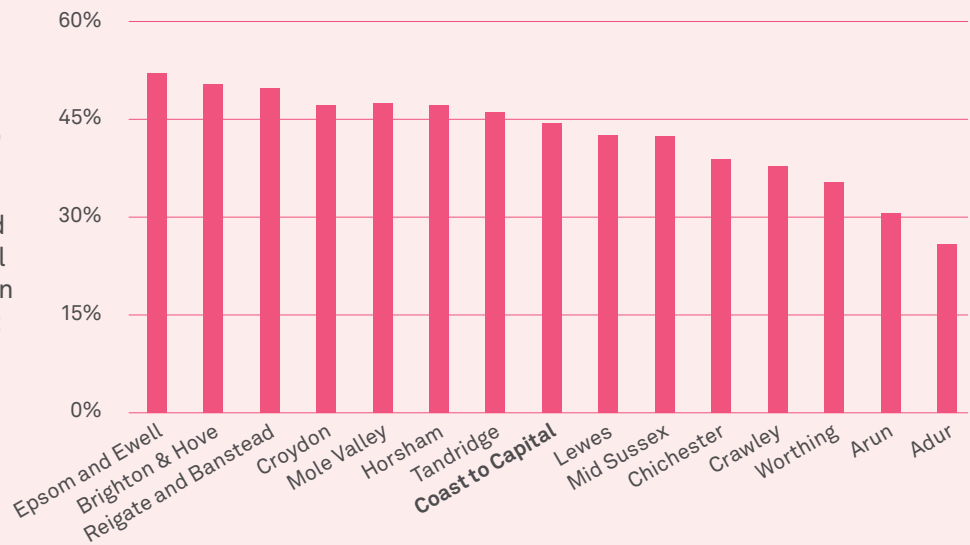
²² Source: Nomis (Office for National Statistics), Annual Population Survey, Labour Supply - Economic inactivity, 2017

²³ Source: Nomis (Office for National Statistics), Annual Population Survey, Labour Supply - Economic inactivity, 2017

²⁴ Source: Nomis (Office for National Statistics), Annual Population Survey, Qualifications, 2017

However, the area does have areas of lower skilled residents, as seen in **Figure 7**. Despite areas such as Epsom and Ewell and Brighton & Hove having over 50% highly qualified populations there are places such as Crawley, Chichester, and Worthing which have NVQ4+ levels (degree level or equivalent) 4% lower than the local average and are only just in line with the national level. Along the coast, Adur and Arun are 14-17% below the local average; these local disparities create mismatched local labour markets that affect the level of high skilled businesses and jobs that can be supported in different areas.

Figure 7: Coast to Capital percentage of 16-64 Population with NVQ4+ Qualification, 2016

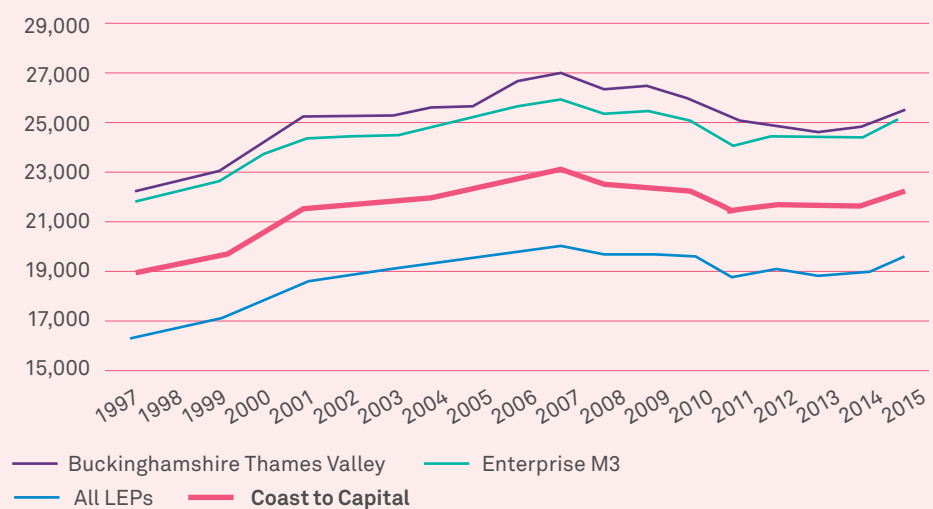


Source: Nomis (Office for National Statistics), Annual Population Survey, Qualifications, 2017

Wages

As part of the economically successful South East, the Coast to Capital area has income levels above the national average. Since 2007 wages in the UK have declined and have yet to recover and the same is true for Coast to Capital. Gross Domestic Household Income (a measure of how prosperous households are) in real terms is currently £22,100, this is £1,000 lower than the 2007 peak²⁵. The area remains better off than nationally; however, it is average amongst comparator LEP areas and others in the South East. LEPs such as Enterprise M3 and Buckinghamshire Thames Valley are significantly more prosperous than Coast to Capital, as seen in **Figure 8**.

Figure 8: Coast to Capital Gross Domestic Household Income per capita, (inflation adjusted), 1997-2015



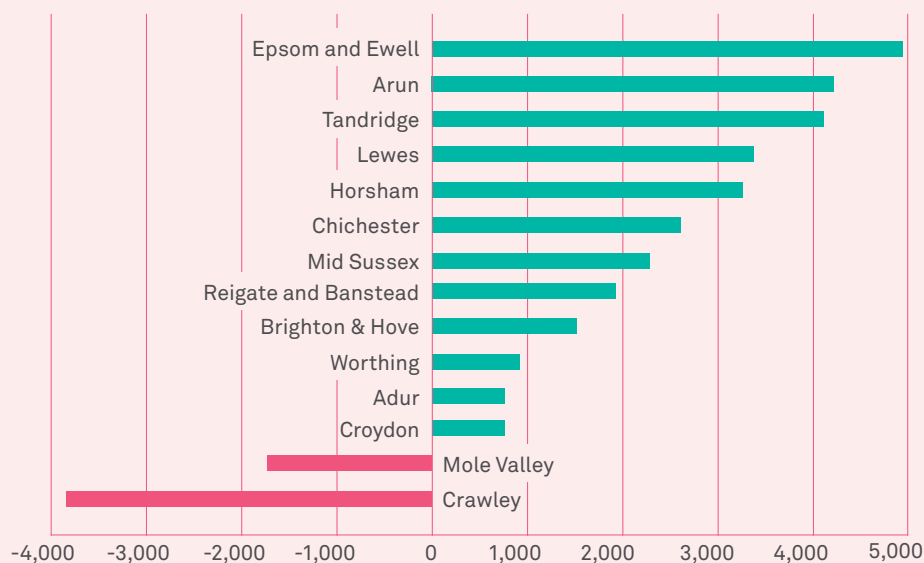
Source: Office for National Statistics, Regional gross disposable household income by local enterprise partnership, 2015

²⁵ Source: University of Sussex, A comparison of Coast to Capital with comparator Local Enterprise Partnerships, 2018

Within the Coast to Capital area there is a clear gap in income between commuter wages (where people leave their local area to work) and workplace wages (where people work where they live). Residents who commute out of the area, largely to London where wages are typically a third higher than locally, are on average £1,700 a year better off. The pressure of housing affordability means that those who commute are more able to afford housing than those who work in local businesses.

As seen in **Figure 9**, only the Mole Valley and Crawley areas offer wages to the local workforce that are higher than resident wages, highlighting the strength of their local business bases and the high paying jobs they can offer. In all other parts of our economy, residents can earn more by commuting than they can locally.

Figure 9: Coast to Capital Difference Between Median Annual Resident and Workplace Wages, 2016



Source: University of Sussex, A comparison of Coast to Capital with comparator Local Enterprise Partnerships, 2018

Business makeup

The Coast to Capital area is home to just over 90,000 registered businesses which are predominantly micro (0-9 employees) or small (10-49 employees) businesses accounting for 98.5% of all businesses²⁶. These micro businesses are present at a higher rate in the Coast to Capital area than in the UK as a whole, although average when compared to comparator LEPs. Levels of small and particularly medium businesses are generally lower than the national level, and in comparator Local Enterprise Partnerships, as seen in **Table 3**.

Table 3: Comparator LEPs share of businesses by Employment Band Size (ranked by medium sized business share)

Share of business by employment band size	Small % (10-49)	Medium % (50-49)
Thames Valley Berkshire	7.6%	1.7%
Cheshire and Warrington	8.5%	1.6%
All LEPs	8.6%	1.5%
Enterprise M3	7.7%	1.5%
Buckinghamshire Thames Valley	7.0%	1.4%
South East LEP	8.2%	1.4%
Coast to Capital	7.6%	1.2%

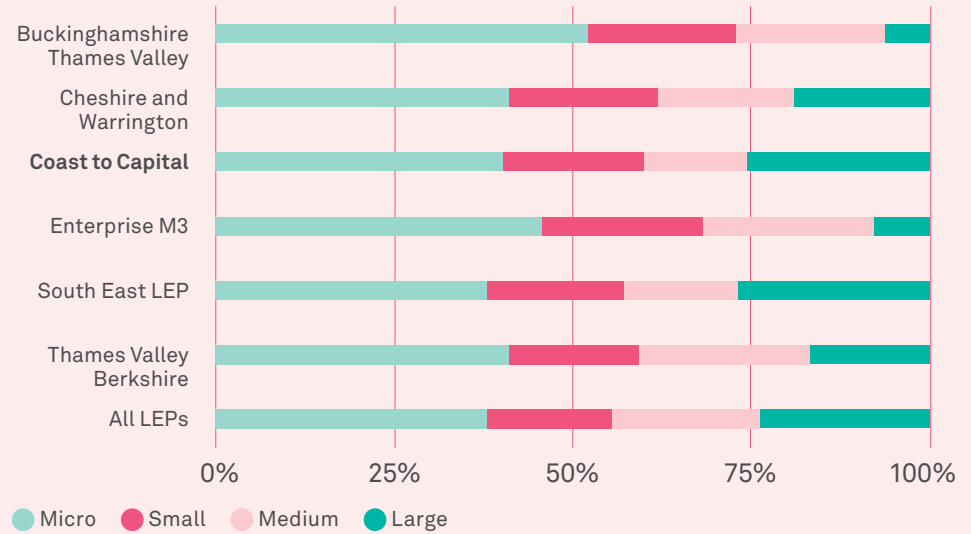
Source: University of Sussex, A comparison of Coast to Capital with comparator Local Enterprise Partnerships, 2018

²⁶ Source: University of Sussex, A comparison of Coast to Capital with comparator Local Enterprise Partnerships, 2018

Despite the majority of businesses being micro, work to estimate the share of employment in each size band suggests that micro businesses account for 40% of employment²⁷ and large businesses account for 25% of employment in Coast to Capital, as seen in **Figure 10**. Locally both large and micro businesses account for higher levels of employment than nationally. This highlights a potential weakness in the level of employment accounted for by small and medium businesses, which taken together make up an estimated 35% of employment. This is 4% lower than nationally and around 10% lower than comparator LEPs.

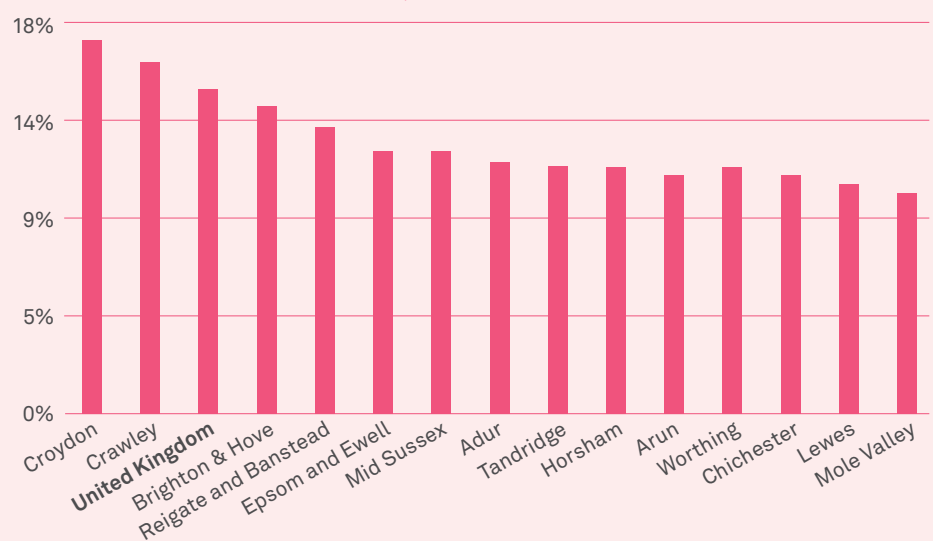
Overall business growth has been slightly below the national level, 8% since 2015 compared to 10% nationally, but is average compared to comparator LEPs. The rate of new business start-ups is 13% of all businesses, fairly average in comparison with comparator LEPs, but some way below the rate seen nationally (15%). This raises questions about the level of entrepreneurship within the Coast to Capital area, and the wider South East. The start-up rates are low across the area and particularly in less urban areas, as seen in **Figure 11**. The only two areas to have start-up rates above that of the national level are Croydon and Crawley.

Figure 10: Comparator LEPs estimated Employment Shares by Employment Size Band, 2015



Source: University of Sussex, A comparison of Coast to Capital with comparator Local Enterprise Partnerships, 2018

Figure 11: Coast to Capital start-up businesses as a percentage of total businesses in Local Authorities, 2016



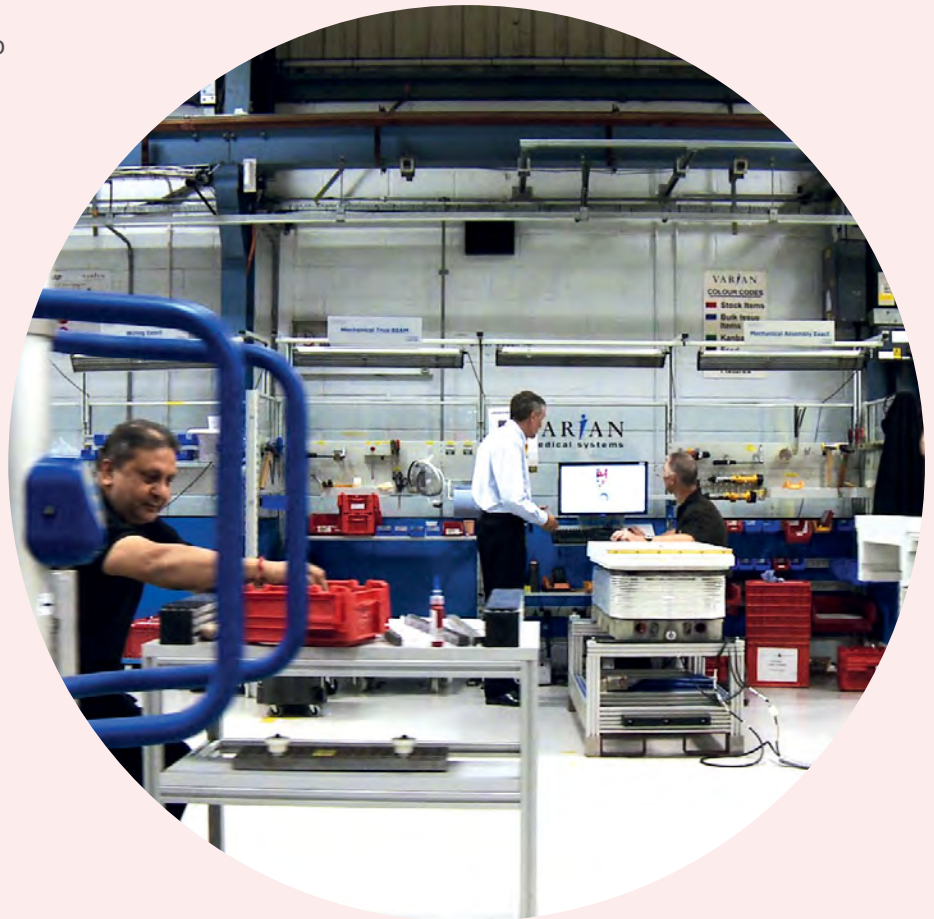
Source: Office for National Statistics, Business Demography, UK, 2016

²⁷ Source: University of Sussex, A comparison of Coast to Capital with comparator Local Enterprise Partnerships, 2018

The more dispersed nature of rural economies compared to urban ones may reduce the competitive intensity of businesses, similar to how collocation of businesses drives agglomeration effects.

This is also seen in the rate of business scale up, for which Coast to Capital is ranked 28th out of the 38 LEPs for the percentage of businesses scaling from £1 million to £3 million plus²⁸. This lower rate of scale up business may also help explain the lower levels of small and medium businesses in our area.

The future challenge is to ensure that we create the conditions for these companies to grow further, and to develop local supply chains, so that our area creates a natural home for them.



Engineers at Varian Medical Systems
© Gatwick Diamond

²⁸ Source: Enterprise Research Centre, UK Local Growth Dashboard, 2017



Our economic challenges

The Coast to Capital area has a large and diverse economic base, contributing £50.7 billion to the UK economy in 2016, the seventh largest Local Enterprise Partnership (LEP) economy. However there is no room for complacency in terms of the future growth of our area in relation to the fastest growing places in England. Our productivity levels are lower than other parts of the South East, and our growth rates are lower than the English cities of the Midlands and the North, as seen in Table 4.

The Government’s Industrial Strategy is a very timely reminder of the fast-changing competitive context for our economy. It confirms the challenges facing the national economy in terms of the global trading environment, including our exit from the European Union; and wider technological and demographic changes.

On a local level, the challenge that we face is to ensure that the Coast to Capital area remains an attractive and desirable investment destination; specifically as the city regions of the North and Midlands, and other parts of the wider South East develop their own visions and case for wider investment. We need to identify further steps in order to ensure that our economy has the resilience and flexibility to maintain its competitiveness. This will require strong leadership and common

Table 4: Regional GVA growth 1998 to 2016

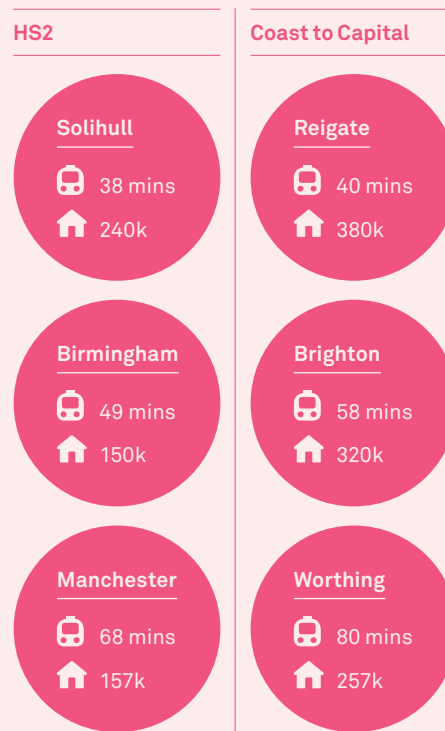
Area	Gross Value Added Growth 1998–2016
London	136%
Oxfordshire	112%
West of England	111%
Greater Cambridge and Greater Peterborough	103%
Greater Manchester	92%
Thames Valley Berkshire	90%
Liverpool City Region	89%
Greater Birmingham and Solihull	85%
Coast to Capital	82%
Leeds City Region	81%

Source: Office for National Statistics, GVA for Local Enterprise Partnerships, 2017

purpose from across business and the public sector in order to set a clear direction for the development of our area.

One of these major changes is the rebalancing of the national economy which will accelerate once High Speed Two (HS2) opens in 2026. The new railway will provide significant capacity to link London with the Midlands and North, and commuter towns north of London. HS2 will

Figure 12: Increased Competition: Travel Times and House Prices on the HS2 Route Compared with Coast to Capital



Source: HS2, 2018 / HM Land Registry UK House Price Index, 2017

deliver journey times and reliability that will bring many towns and cities within easy commuting distance of the capital. **Figure 12** illustrates how popular commuter destinations in the Coast to Capital area compare with new HS2 destinations in terms of journey times and house prices. In short, HS2 will allow other parts of the country to compete effectively with our area as a natural destination for the professional population and businesses of London.

Building on this, the following section explores the further challenges and risks to our future economic performance according to the **five foundations of productivity** which are set out in the Industrial Strategy. These are the fundamental issues which are likely to arise within the local economy over the coming years and the impact that they will have on our productivity and competitiveness.

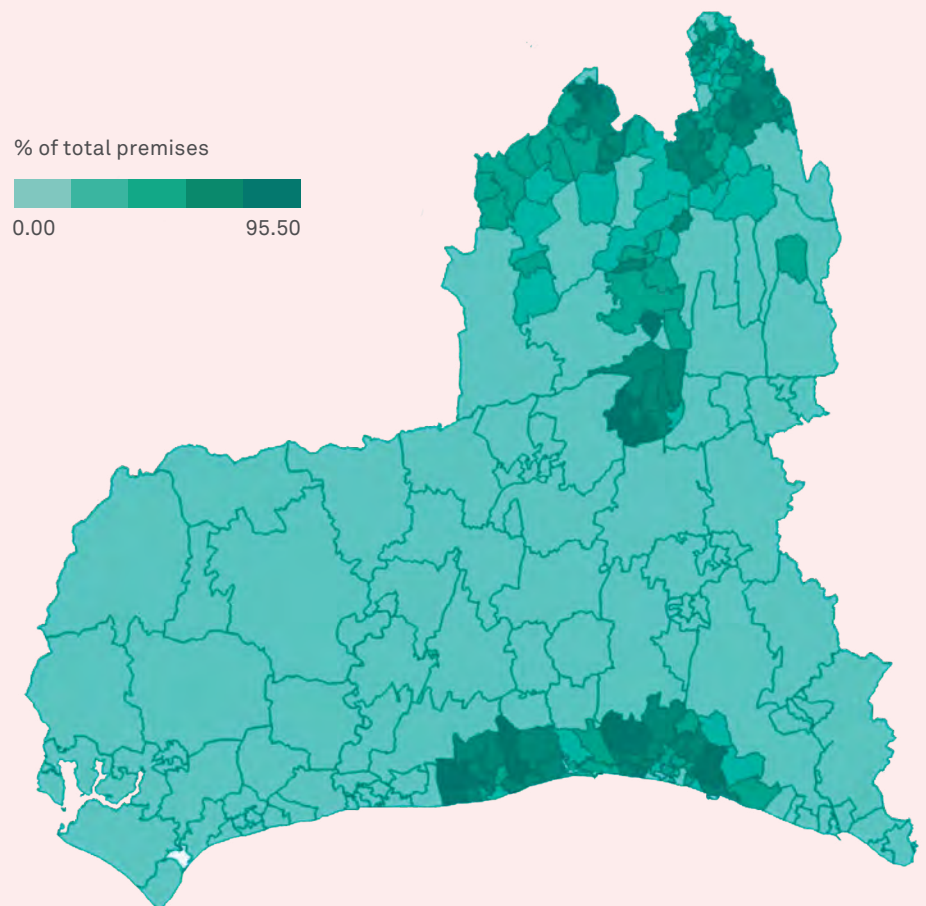
Infrastructure

Our area suffers from a long-term deficit in terms of the public infrastructure which is needed to make us a competitive place for businesses to invest and develop.

The area's transport infrastructure is mostly unchanged since the 1980s, when the completion of the M25 marked the last major investment in our local capacity. Our road and rail infrastructure struggles to deal with the pressures on it from a 21st century economy; with significantly increased pressure from greater commuter numbers travelling to London, and between our economic hubs.

Our digital infrastructure is also at an uncertain phase of its development. In spite of the area's innate strengths in digital and creative technologies, the quality of our infrastructure remains inconsistent; with problems accessing modern technology services. Ultra-Fast Broadband is only accessible to premises in limited parts of the Coast to Capital area, as seen in **Figure 13**.

Figure 13: Coast to Capital % of premises with Ultra-Fast Broadband (100mb+) availability (by Medium Super Output Area), 2017



Source: Ofcom, Connected Nations, 2017

The way energy is generated, distributed, and consumed is critical to the economy and our lives, and has a significant impact on our environment. The Climate Change Act sets a legally binding target of reducing emissions by at least 80% by 2050, which needs to be achieved without sacrificing economic growth. There is evidence this is already happening; energy use and emissions are falling while the economy continues to grow. However there still needs to be a significant transition to a low carbon economy to meet these targets. Coast to Capital is well placed to drive this having developed a local energy strategy in partnership with South East Local Enterprise Partnership and Enterprise M3. The area already has a range of projects taking place, such as community owned renewable energy cooperatives, the Rampion Wind Farm, and local government investment into large scale solar farms.

Water is a key resource for people and business and the strain on this caused by usage, poor infrastructure, and climate change is a significant challenge for our area. Without any investment, Southern Water estimates they will need to increase the water supply by 50% to meet growing population needs²⁹. This pressure will test the vast network of water pipes across the area, which are aging and currently lose around 80 litres per household per day to leaks. However, with the right investment, innovation, and efficiency savings we could

require less than we currently use. The level of waste being collected is rising³⁰, driven by economic recovery and population growth, at a time when the space available for landfill has fallen by 40% since 2001³¹. The escalating landfill tax is further making landfill use less economical, leading to an increase in recycling and incineration and energy recovery, such as the Veolia plant in Newhaven. There is a target of 50% recycling rate by 2020 for the UK, which currently stands at 45% as of 2016, growing from around 10% in 2001. The growth of the economy and the population will continue in Coast to Capital and the waste infrastructure and behaviours of residents and businesses will need to continue to adapt to meet these needs.

Our natural capital is key to the identity and future success of our area. Much of our green space is iconic and enjoys statutory designation and protection, including the South Downs Natural Park and Areas of Outstanding Natural Beauty in Surrey, and large parts of the area are part of the green belt. The scale and significance of the natural capital in the area means our future economic competitiveness depends on developing a coherent approach to how we will use the natural assets of the area in order to develop a strong model for economic growth.



Rampion Wind Farm maintenance
© EON

²⁹ Source: Southern Water, Water Resources Management Plan (consultation document), 2018

³⁰ Source: Department for Environment, Food & Rural Affairs, Local authority collected waste management statistics - annual results, 2017

³¹ Source: Environment Agency, Waste management for England, 2016



Table 5: Coast to Capital estimated vacancy rates

Town	Office Vacancy Rate %	Industrial Vacancy Rate %
Horsham and Mid Sussex	4.0%	4.0%
Crawley and Gatwick	15%	3.8%
Brighton & Hove	3.2%	2.6%
Epsom and Leatherhead	5.0%	2.9%
Redhill and Reigate	5.0%	5.0%
Croydon and surrounds	4.5%	4.5%

Source: Stiles Harold Williams Partnership LLP, 2018

Business environment

Our area has traditionally done well in attracting investment because of our international connectivity, proximity to London and high quality of life in the local area. Like the rest of the UK, Foreign Direct Investment in our area fell between 2016/17 and 2017/18. Export growth in the South East region remains strong, growing 10.9% from 2016 to 2017.

As the evidence base in Chapter 4 shows, the area has a very broad based economy, and is home to a wide range of growing sectors with exciting possibilities for further growth. However, the growth and success of emerging businesses in the area is often put at risk by a lack of premises for them to occupy,

as seen in **Table 5**. The shortage of good quality, flexible, and affordable office, industrial and specialist space is one reason why the area has a higher number of micro businesses than other parts of the South East, and lower numbers of scaling and medium size businesses.

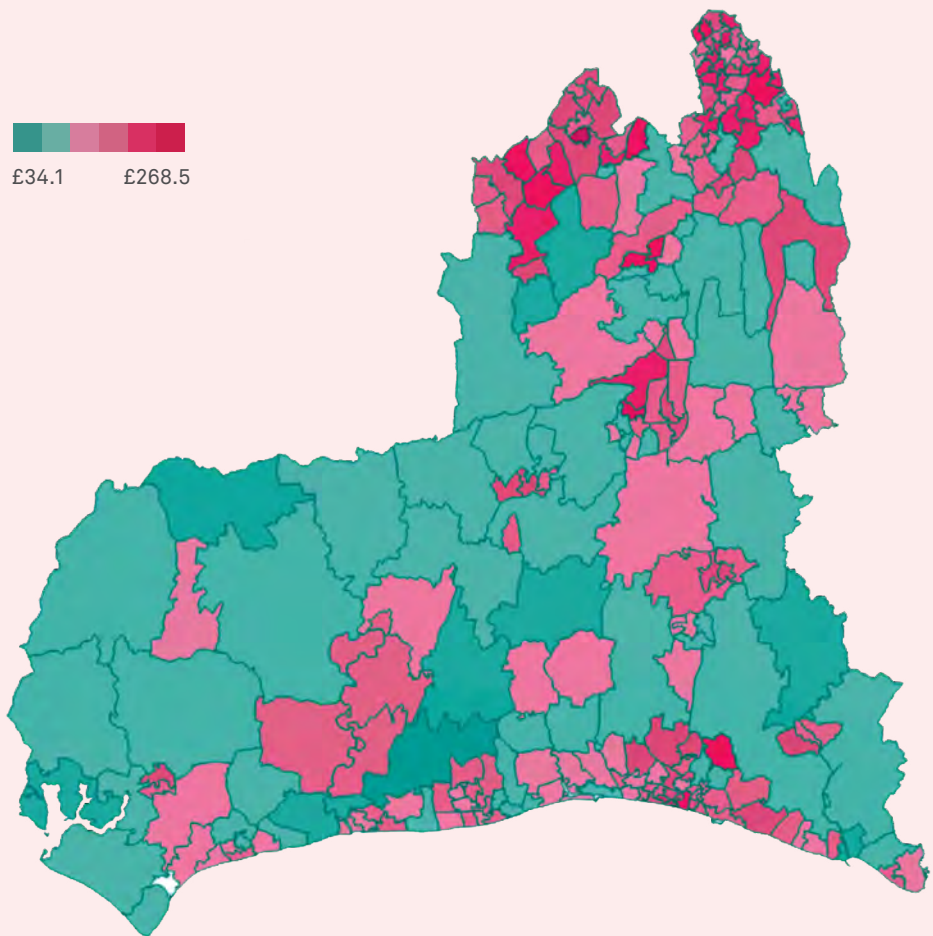
Much of the commercial space in the Coast to Capital area is far more expensive than the England median and in places such as Crawley, Epsom and Ewell and Reigate it can cost up to 2.5 times more. **Figure 14** illustrates the variation in rateable values of commercial space across the area.

Micro businesses and start-ups find it harder to offer higher paid jobs, opportunities for graduates or higher level apprentices and are limited in their capacity to export.

Our wider business infrastructure has failed to keep pace with the growing expectations of investors and businesses, particularly those international businesses which might be looking to invest in the UK and should see our area as a natural destination. No major new business parks have been built in the area since Manor Royal, at Crawley, in 1950. Although plans are in place for similar developments in Horsham, Burgess Hill and Horley, the area's business park capacity is significantly behind many other parts of the South East. There has been significant investment in modern, high tech business parks along the M4 and M3 corridors and further plans for major growth along the new Cambridge - Milton Keynes - Oxford corridor.

The lack of business space is further compounded by increasing rates of conversion of existing businesses premises to residential housing under the Article 4 regulations. Since 2013 Crawley has lost 12% of stock to Permitted Development Rights, Croydon has lost 15%, and Brighton & Hove has lost 17%³². This trend also affects the role of town centres as traditional employment centres, with anchor local employers being replaced by residential development and the loss of opportunities for high quality local employment.

Figure 14: Coast to Capital median rateable value (£ per m2) of commercial space, 2017



Source: Valuation Office Agency, Rating List, 2017

³² Source: Stiles Harold Williams Partnership LLP, 2018

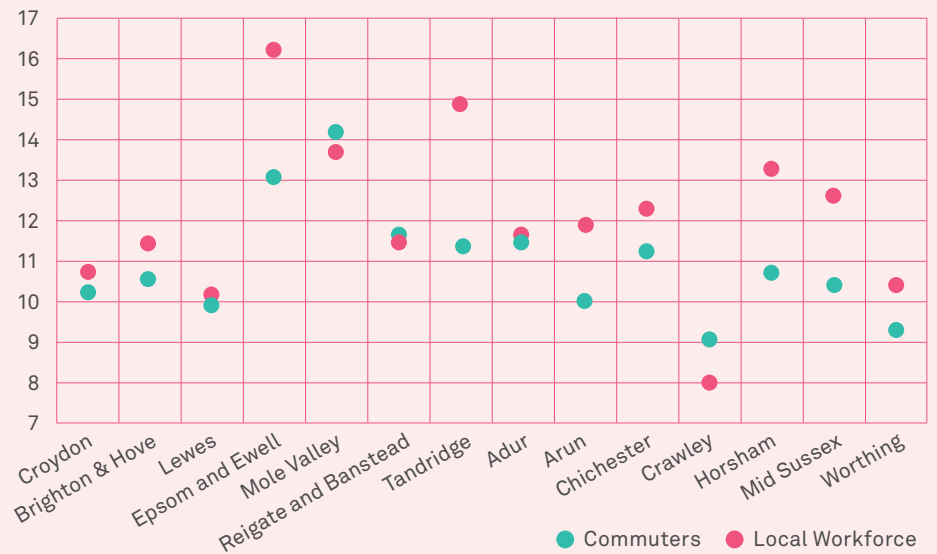
Places

One consequence of the lack of sufficient business space is the displacement of economic activity to other areas, including London. Although the area has always been closely integrated into the London economy, patterns of commuting have changed markedly in recent years.

120,000 people commute daily to London, drawn in by the proximity of high skilled jobs and wages that are on average a third higher than can be earned locally. There is a long tradition of commuting into London from towns such as Reigate and Dorking, but regular commuting has now extended further afield to coastal towns such as Worthing, Newhaven and Shoreham. 27,000 people use services from our area to London every working day between 8am and 9am. This peak hour demand is expected to grow to 38,000 by 2043.

Commuting patterns are closely related to a sharp increase in migration from London to our area. The area has long attracted people moving out of London, as well as people in retirement and those looking to study at our universities. In 2016, 13,000 people relocated from Greater London to our area; this has risen each year since 2011 when 7,300 people moved to the area from London. The largest group of inward movers are 30-40 year olds³³, often established professional workers moving to the Coast to Capital area with their families and looking to take advantage of the

Figure 15: Median Houseprice to Salary Ratio 2016 – Commuters & Local Workforce



Source: Office for National Statistics, Housing affordability in England and Wales, 2017

lifestyle advantages on offer. Rising house prices mean that it is more affordable to live in the area by commuting, as seen in **Figure 15**. Commuter journey times have increased accordingly, placing increased pressure on constrained commuter services.

The Coast to Capital area has one of the highest levels of house prices, in relation to income, in England. The Government's Housing White Paper³⁴ confirms that, while levels of affordability vary within the area they are consistently above the national average and in most parts of the area above the London average.

Delivery of housing is a statutory responsibility of local authorities. Nonetheless, the affordability and availability of housing is

a fundamental factor in the competitiveness of our area in attracting businesses and growing our economy. If people cannot afford to live in our area, they will consider moving to other parts of the UK where house prices are lower.

We therefore consider housing to be one of the most significant issues facing our area and work to support housing delivery in every way that we can. This includes providing infrastructure funding to support housing delivery, supporting local authorities and housing developers in relation to specific sites, and raising the profile of our area with Government through instruments such as the Housing Infrastructure Fund.

³³ Source: Office for National Statistics, Internal migration: by local authority and region, age and sex, 2016

³⁴ Source: Ministry of Housing, Communities & Local Government, Fix our broken housing market, 2017

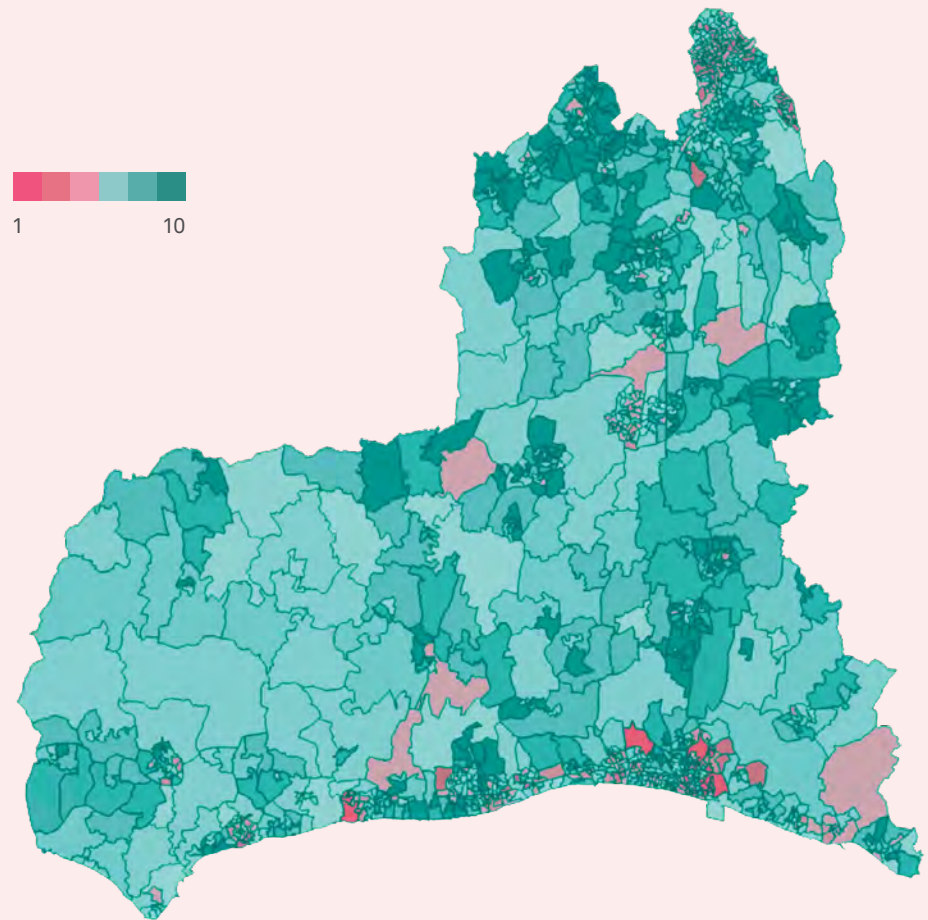
The recent creation of Homes England confirms the Government's commitment to tackling the housing crisis. We will continue to represent the interests of our region in supporting this: getting investment and focus on the needs of our area in order to help build strong and sustainable communities where people can live and work.

The growing dependency on London serves to feed growing inequality within the area. People who cannot access the London labour market are more likely to have lower skills, lower income and less opportunity to meet their economic potential. In spite of the high levels of economic performance in many parts of the Coast to Capital area, and high levels of employment, there are still persistent pockets of inequality and disadvantage.

This inequality has an adverse effect on economic growth. Income inequality reduces the education opportunities of people from lower socio economic backgrounds, hampering skills development and social mobility³⁵. Every community has inequality and deprivation within it, however in the Coast to Capital area it is concentrated in urban areas, such as Croydon, Crawley, and Brighton, and along the coast in Bognor Regis, Littlehampton, Worthing and Newhaven.

Each place will have different dimensions of inequality and deprivation, this reflects a need to develop local economies that are matched to the needs and ambitions of its residents.

Figure 16: Coast to Capital Index of Multiple Deprivation Ranking (by Lower Super Output Area), 2015



1 equals most deprived, 10 equals least deprived

Source: Ministry of Housing, Communities & Local Government, English indices of deprivation, 2015

³⁵ Source: Organisation for Economic Cooperation and Development (OECD), Trends in Income Inequality and its Impact on Economic Growth, 2014

People

Evidence shows that our workforce is well-educated and mobile, although persistent inequalities mean that there are worrying pockets of lower level skills in coastal towns and in Crawley. We have record levels of employment, an increase in employment for previously underrepresented groups and low levels of economic inactivity.

This highly skilled workforce is one of the area's major attractions to employers. However, there are also significant skills gaps as our skilled workforce is attracted to London where wages are higher and as technology in the world of work moves at a faster pace than the education and skills system.

Like the rest of the UK, Coast to Capital has an ageing population. This is a significant risk to the overall productivity of the working age population as the more productive age cohorts are forecast to grow at a much slower rate. In addition, current employment patterns amongst older workers do not give cause for optimism that this group will remain active within our economy. **Figure 17** shows a clear trend in the UK workforce for employment rates to drop significantly from the age of 53, where around 80% of people are employed, to statutory retirement age where employment rates are as low as 20%.

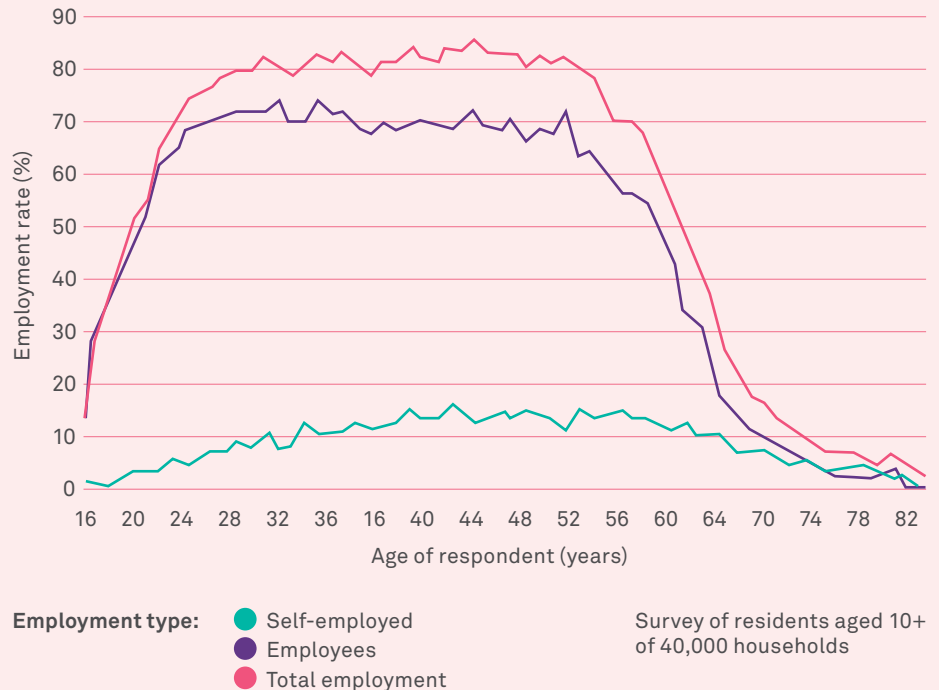
A further challenge comes from the automation of jobs as a result of emerging digital technologies and business models. This will impact on the type and number of jobs available in the area as we advance rapidly through the Fourth Industrial Revolution³⁶. Analysis by PwC³⁷ suggests up to 30% of jobs are at risk of automation, with up to 240,000 at risk in the Coast to Capital area based on 2015 job levels.

We need to make sure that the residents of Coast to Capital have

the skills necessary for the 21st century, access to good jobs and the earning power that affords them a good standard of living no matter where they live.

At the same time we must focus on raising the productivity of the workforce so that the area's economy can continue to grow bringing longer term investment into the area in order that everyone living in the area can achieve their ambitions.

Figure 17: UK Employment rate by type of employment and by age, 2014



Source: Government Office for Science, Future of an ageing population (p30), 2016

³⁶ Source: Department for Business, Energy & Industrial Strategy, Industrial Strategy: building a Britain fit for the future (p32), 2017

³⁷ Source: PwC, How will automation impact jobs?, 2018

Ideas

The South East of England as a whole is the third most innovative place in Europe after Stockholm and Copenhagen³⁸. Coast to Capital is a strong supporter of Innovation South³⁹, covering the area between Dorset and Kent, which has world class strengths in digital enabling technologies and has the potential to be a powerhouse for the UK's innovation.

Our area offers unique specialisation in fields such as quantum computing, with one of the few quantum computers in the world housed at the University of Sussex in Brighton. According to The Smart Specialisation Hub⁴⁰, the area has significant strengths in digital services and other emerging and enabling technologies. This natural comfort with new, emerging technologies can be seen by the range and high value added of the economic sub-sectors which are emerging strongly within our area.

If we are to take full advantage of the highly innovative businesses in our area, it is essential that our universities and businesses large and small are well connected within the area. At the moment, the growing economy along the M23 including Croydon and the Gatwick Diamond depends on the Universities in Brighton or London for any direct academic input. Businesses in coastal West Sussex have close links with the University of Chichester. Our rural businesses engage with a mix of our four universities. The University for the Creative Arts has a campus in Epsom. But as a non-city region our area lacks the consistent presence and influence of major universities which our competitor areas enjoy.

³⁸ Source: European Commission, Regional Innovation Scoreboard (RIS), 2017

³⁹ Source: Innovation South, A Powerhouse of World Class Strengths in Digital Enabling Technologies, 2017

⁴⁰ Source: Smart Specialisation Hub, Mapping England's Innovation Activity, 2017



Satellite image of the Coast to Capital area
and the wider South East
© 2018 DigitalGlobe



sector analysis

Research by the University of Chichester⁴¹ reiterates the importance of the Advanced Manufacturing, Creative, Digital, and IT, Low Carbon, Professional and Financial Services, and Health and Life Science sectors to the local economy, as originally identified in the 2014 Strategic Economic Plan. Additionally the research emphasised the importance of the Horticulture sector and the Visitor Economy.

These sectors are broad and, as such, don't necessarily reveal emerging sub-sectors where key companies operate, cutting edge technologies are being developed and used, and are significantly specialised compared to the national average.

Understanding the emerging sub-sectors of our economy helps us to identify specific areas for action within our Local Industrial Strategy where investment and interventions will help them to develop more strongly across our area. This strategy does not prioritise individual sectors for growth or investment in the area.

A location quotient analysis⁴² of these sectors has highlighted a number of specialisations at a local level, as seen in **Figure 3** on page 17. These sub-sectors may not be the largest employers, but they represent clear specialisms and strengths throughout the area, and in some cases more locally, that create a comparative advantage on which to compete nationally and internationally.



Shoreham Port
© Shoreham Port



Med Tech



Crawley, Reigate and Banstead, Horsham, Arun, Adur, Chichester, Mole Valley, Worthing



Elekta, Varian Medical Systems, Philips



The sub-sector employs 3,000 people in the area, accounting for 7% of national employment in the sub-sector

⁴¹ Source: University of Chichester, Sector Analysis, 2018

⁴² Location quotient analysis is the ratio of the local share of employment in a location compared to the share of employment nationally, which if above 1.0 suggests specialisation in the sector.



Pharmaceuticals



Worthing, Crawley,
Mid Sussex



GSK, Novo Nordisk,
CSL Behring



The sub-sector
employs 1,500 people
in the area, accounting
for 5% of national
employment in
the sub-sector



Computer Software Programming and Publishing



Brighton & Hove,
Horsham, Croydon,
Crawley, Epsom
and Ewell, Mole Valley



Creative Assembly,
Brandwatch,
Dotmailer



The sub-sector
employs just over
6,500 people,
accounting for just
over 3% of national
employment in
the sub-sector



Data Processing & Hosting



Crawley, Mid Sussex,
Mole Valley, Reigate
and Banstead



You At Work, Bunyad,
The Focus Group



The sub-sector
employs 1,600 people
in the area, accounting
for 3.6% of national
employment in
the sub-sector



Insurance and Financial Services



Reigate and Banstead, Brighton & Hove, Horsham, Mole Valley, Mid Sussex, Chichester, Crawley, Worthing, Epsom and Ewell, Croydon, Tandridge



RSA, Zurich, American Express



The sub-sector employs over 31,000 people in the area, accounting for 5% of national employment in the sub-sector



Telecommunications



Croydon, Horsham, Mid Sussex, Mole Valley, Worthing, Adur, Brighton & Hove



Aircom International, Spirent, Berrycom Solutions



The sub-sector employs 5,250 people in the area, accounting for 3.3% of national employment in the sub-sector



Visitor Economy and Support Services



Brighton & Hove, Crawley, Arun, Horsham, Chichester, Mole Valley, Reigate and Banstead, Tandridge



South Downs National Park, coastal landscape, Surrey Hills AONB



Visitors spend over £1.2 billion each year along the coast



Brighton FIELD © U&I



Air Transport



Horticulture and Food Manufacturing



Computer & Consumer Electronic Manufacturing



Crawley, Reigate and Banstead, Tandridge



Chichester, Arun, Lewes, Horsham, Mid Sussex



Tandridge, Reigate and Banstead, Brighton & Hove, Chichester, Adur, Worthing, Horsham, Lewes, Arun



London Gatwick airport, Virgin Atlantic, Norwegian Air



Natures Way Foods, Denbies Wine Estate, Tangmere Airfield Nurseries



Bowers & Wilkins, GP Acoustics, Vindex Systems



The sub-sector employs around 10,000 people in the area, accounting for 15% of national employment in the sub-sector



One of the largest horticulture areas in the UK, employing upwards of 9,000 FTE jobs providing in excess of £1 billion production



The sub-sector employs 1,200 people in the area, accounting for 5% of all national employment in the sub-sector



Communications & Navigation Equipment Manufacturing



Lewes, Horsham, Mid
Sussex, Tandridge,
Adur, Mole Valley,
Epsom and Ewell,
Crawley, Arun, Worthing



Electronic Temperature
Instruments, Eurotherm,
L3 Technologies



The sub-sector employs
4,200 people in the area,
accounting for 6% of
national employment
in the sub-sector



Electric Power Generation and Transmission



Worthing, Brighton &
Hove, Crawley, Arun,
Horsham, Lewes,
Mole Valley



E.ON (Rampion), Veolia,
Doosan Babcock



The sub-sector
employs 4,200 people
in the area, accounting
for 4% of national
employment in
the sub-sector



Automotive Manufacturing



Adur, Arun, Chichester,
Mole Valley, Croydon



Rolls Royce,
Global Technologies
Racing, Ricardo



The sub-sector
employs 2,750 people
in the area, accounting
for 1.7% of national
employment in
the sub-sector



A business in the Gatwick Diamond © Gatwick Diamond

**Coast to Capital
would like to thank all
of our partners and
stakeholders for their
valuable input into
the production of the
Strategic Economic Plan.**

Our vision by 2030 is for our towns and cities to be known around the world as fantastic places to live, to grow and to succeed. We will become the most dynamic non-city region in England, centred around a highly successful Gatwick airport.

**Coast to Capital
Local Enterprise Partnership**

 @coast2capital

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