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Planning. Design. Economics.



Greater Brighton Background Papers

Presentation to Greater Brighton Economic Board

Emerging Findings
13 February 2015

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Structure

1. Key findings of evidence review:
 - a) The City Region Economy
 - b) The City Region Housing Market
 - c) The City Region Transport System
2. Cross-cutting themes
3. Towards a city region approach

Our work to date:

- Analysed a range of primary and secondary data sources
- Reviewed over 25 background documents and evidence studies
- Convened a workshop session with over 30 stakeholders from across the city region
- Held one-to-one discussions with ‘specialists’ on economy, housing and transport matters
- Undertaken presentations/Q&A sessions with the Greater Brighton & Coastal West Sussex Strategic Planning Board and Greater Brighton Programme Board

Key findings of evidence review

City region in figures:

7 local authorities

1 National Park Authority

179,000 hectares of land

957,000 population, 60% working age

373,000 jobs + 57,000 by 2031

£19.2bn total economic output (GVA)

37,900 registered businesses

The employment base of the city region is equivalent to 50% of all jobs in the Coast to Capital LEP area

Greater Brighton & Coastal West Sussex = **373,300**

Coast to Capital = **780,500**

Enterprise M3 = **759,200**

Solent LEP = **662,400**

New Anglia = **627,500**

Cambridge & Peterbor. = **609,700**

Hertfordshire = **537,500**

Thames Valley Berks = **470,500**

GB & CWS = 373,300

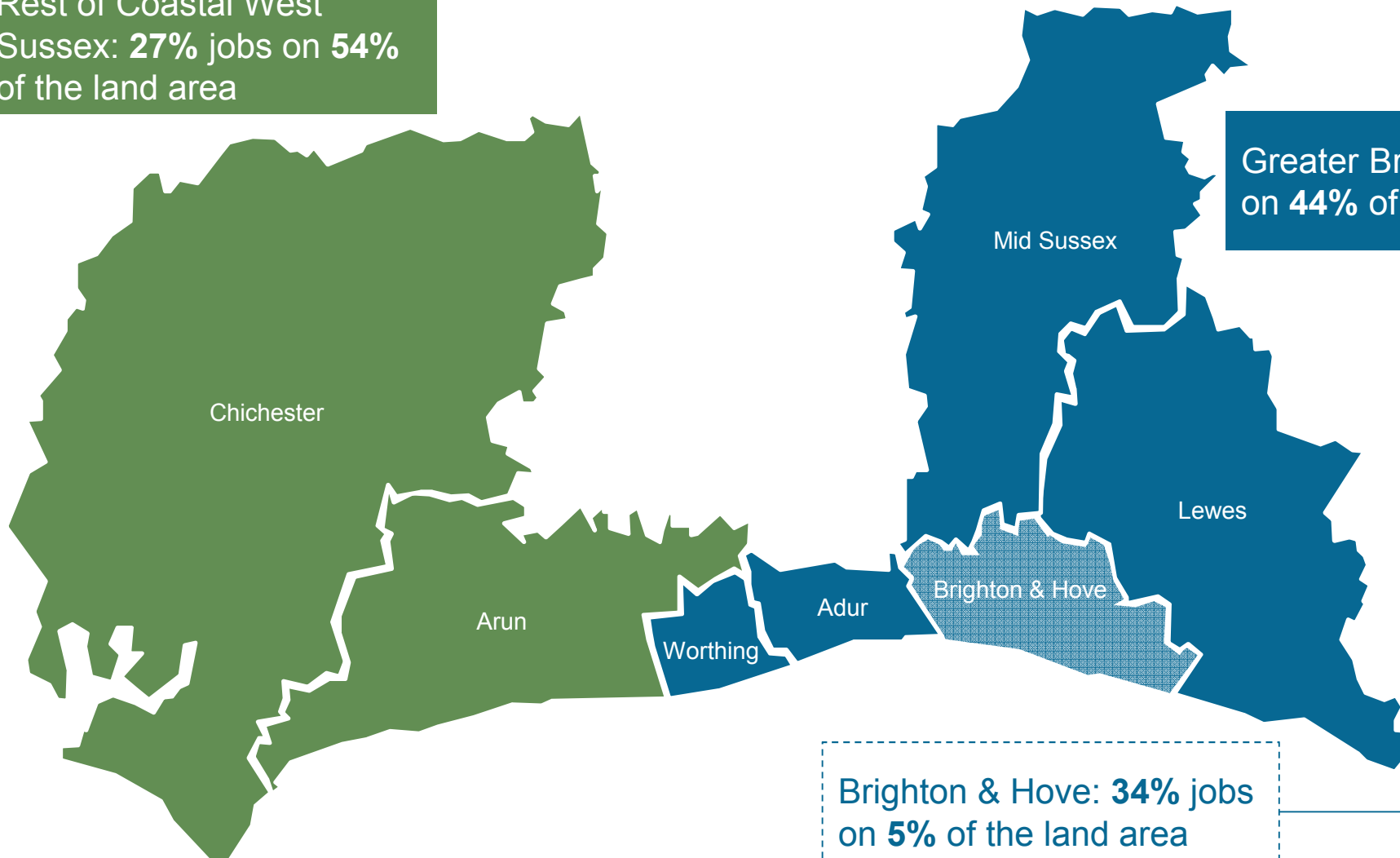
Gatwick Diamond = **353,500**

Oxford City Region = **324,600**

Source: ONS / NLP analysis

Nearly 75% of jobs are located within Greater Brighton (44% of the land area) and over a third within Brighton & Hove

Rest of Coastal West Sussex: 27% jobs on 54% of the land area



Greater Brighton: 73% jobs on 44% of the land area

Brighton & Hove: 34% jobs on 5% of the land area

Source: NOMIS / BRES / ONS / NLP analysis

The performance of the economy varies across the city region, which presents both challenges and opportunities

	Adur	Arun	Brighton & Hove	Chichester	Lewes	Mid Sussex	Worthing	GB & CWS Region
Employment Growth (1997 - 2014)	15.7%	8.1%	26.7%	24.1%	9.9%	0.9%	7.5%	15.3%
Economic Activity	84.4%	85.7%	79.8%	84.6%	79.5%	85.4%	73.1%	81.6%
Unemployment	5.0%	4.2%	6.3%	3.7%	4.9%	2.9%	5.5%	4.8%
GVA per Capita (£)	£20,400	£20,000	£43,900	£37,400	£30,700	£26,800	£29,300	£29,785
% Higher Skilled Workers	36.6%	42.0%	61.0%	50.7%	53.6%	53.6%	48.7%	52.0%
Commercial Space (m ²) per Job	21.4	18.4	11.5	13.6	18.3	14.4	13.5	14.3
Business Start-Ups (per 10,000 workers)	123	111	115	84	134	122	77	93

Note: Green shading indicates above average, and red shading indicates below average when compared to the city region average

Source: NOMIS / Experian 2014 / NLP analysis

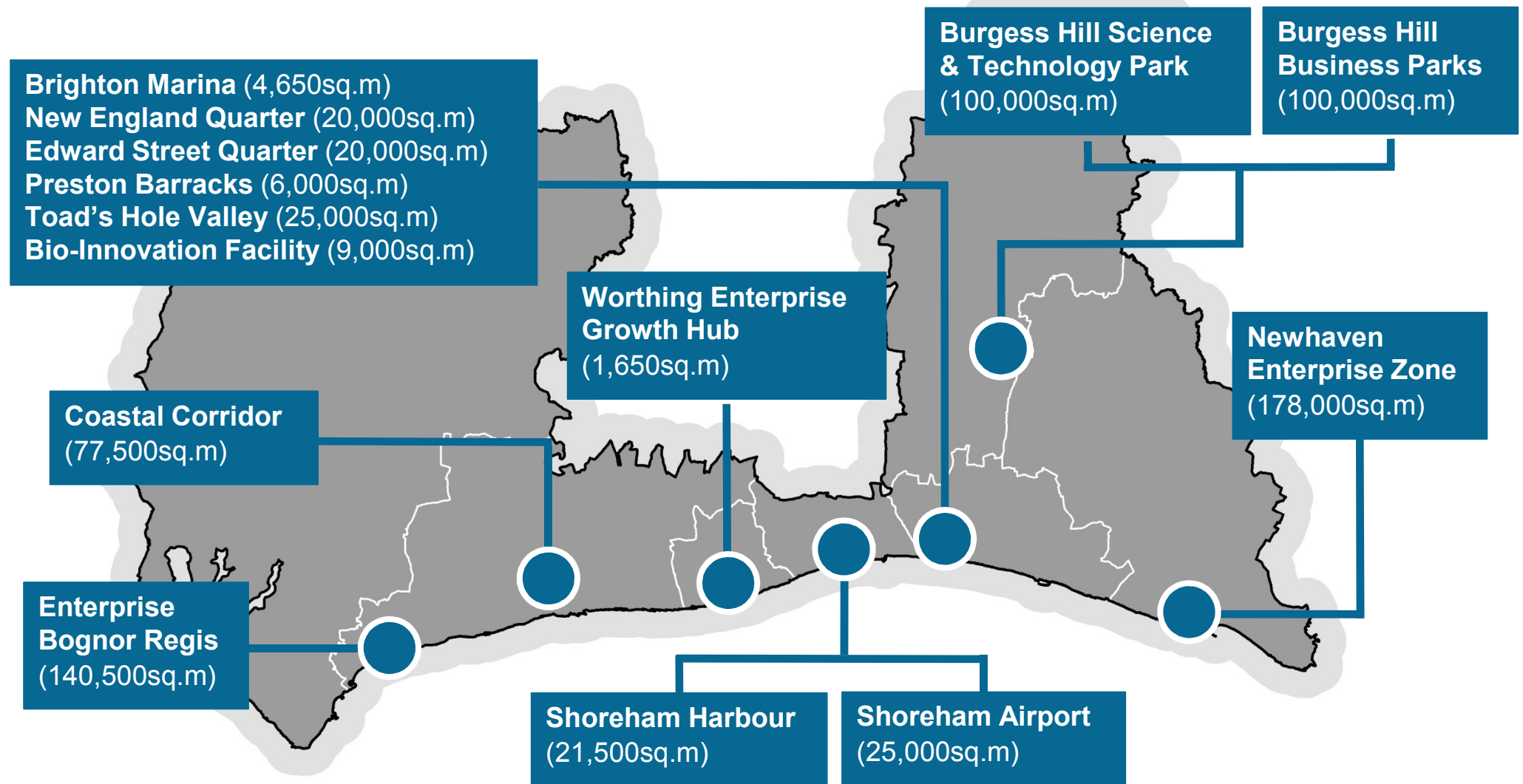
The scale and pattern of economic growth reflects particular sector strengths and weaknesses across the city region

	Adur		Arun		Brighton & Hove		Chichester		Lewes		Mid Sussex		Worthing	
	Past	Future	Past	Future	Past	Future	Past	Future	Past	Future	Past	Future	Past	Future
Administrative Services	▲	▬	▲	▲	▲	▲	▲	▲	▲	▲	▼	▼	▼	▼
Agriculture & Forestry	▬	▬	▼	▼	▲	▲	▲	▲	▲	▬	▼	▼	▬	▬
Computing & IT Services	▬	▬	▬	▬	▲	▲	▲	▲	▲	▲	▲	▼	▲	▲
Construction	▲	▲	▲	▲	▼	▲	▼	▬	▲	▲	▲	▲	▼	▬
Education	▬	▬	▲	▲	▲	▬	▬	▲	▲	▲	▲	▲	▲	▲
Finance & Insurance	▬	▲	▬	▲	▼	▲	▲	▲	▬	▬	▼	▬	▼	▼
Health	▼	▬	▬	▬	▲	▲	▼	▲	▲	▲	▲	▲	▲	▲
Hospitality & Recreation	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▬	▲
Manufacturing	▼	▬	▼	▼	▼	▼	▬	▲	▼	▼	▼	▼	▼	▼
Media Activities	▬	▬	▬	▬	▲	▲	▲	▲	▲	▲	▬	▬	▲	▲
Other Private Services	▼	▬	▬	▬	▲	▲	▬	▬	▬	▬	▼	▬	▬	▬
Professional Services	▲	▲	▲	▬	▲	▲	▲	▬	▲	▲	▬	▬	▲	▲
Public Services & Defence	▬	▬	▲	▬	▲	▬	▲	▬	▼	▼	▬	▬	▼	▬
Real Estate	▬	▬	▲	▬	▲	▲	▲	▬	▲	▲	▲	▬	▲	▲
Residential & Social Care	▬	▬	▲	▬	▲	▲	▬	▲	▲	▬	▲	▬	▲	▲
Retail	▲	▬	▲	▲	▲	▲	▲	▲	▲	▲	▼	▲	▲	▲
Telecoms	▬	▬	▬	▬	▼	▬	▬	▬	▬	▬	▼	▬	▬	▬
Wholesale & Transport	▬	▬	▼	▬	▼	▬	▲	▲	▼	▬	▲	▲	▲	▲

Note: Arrows indicate changes in employment numbers by at least 300 jobs for 'Past' (1997 - 2014) and 'Future' (2015 - 2031) growth trends

Source: Experian 2014 / NLP analysis

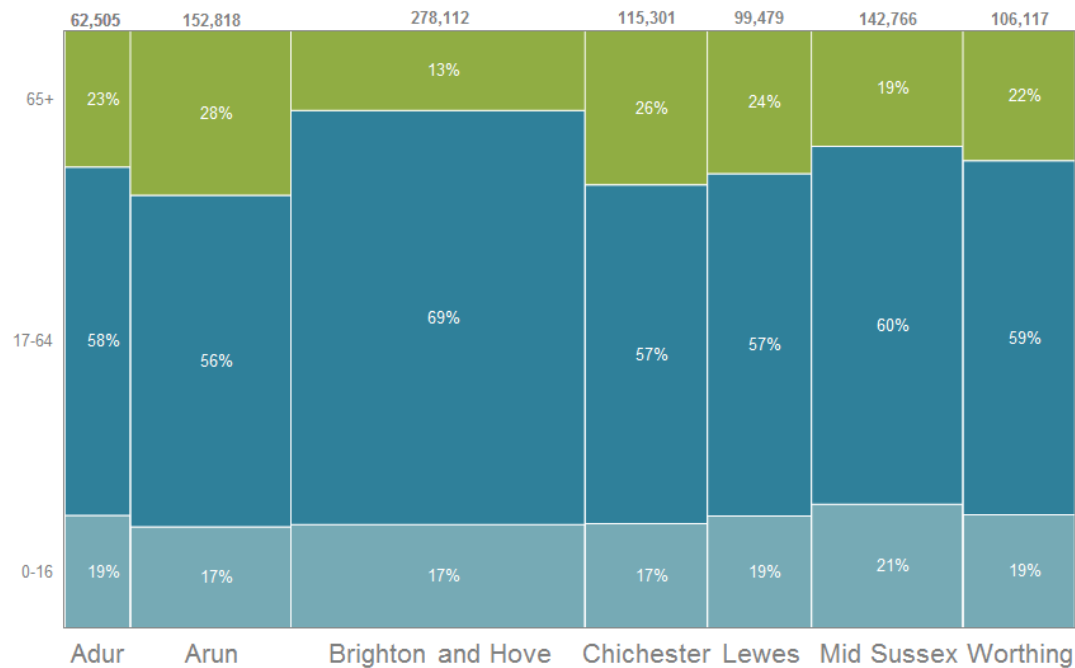
Capacity for c.700,000sq.m of strategic employment floorspace is proposed across the city region



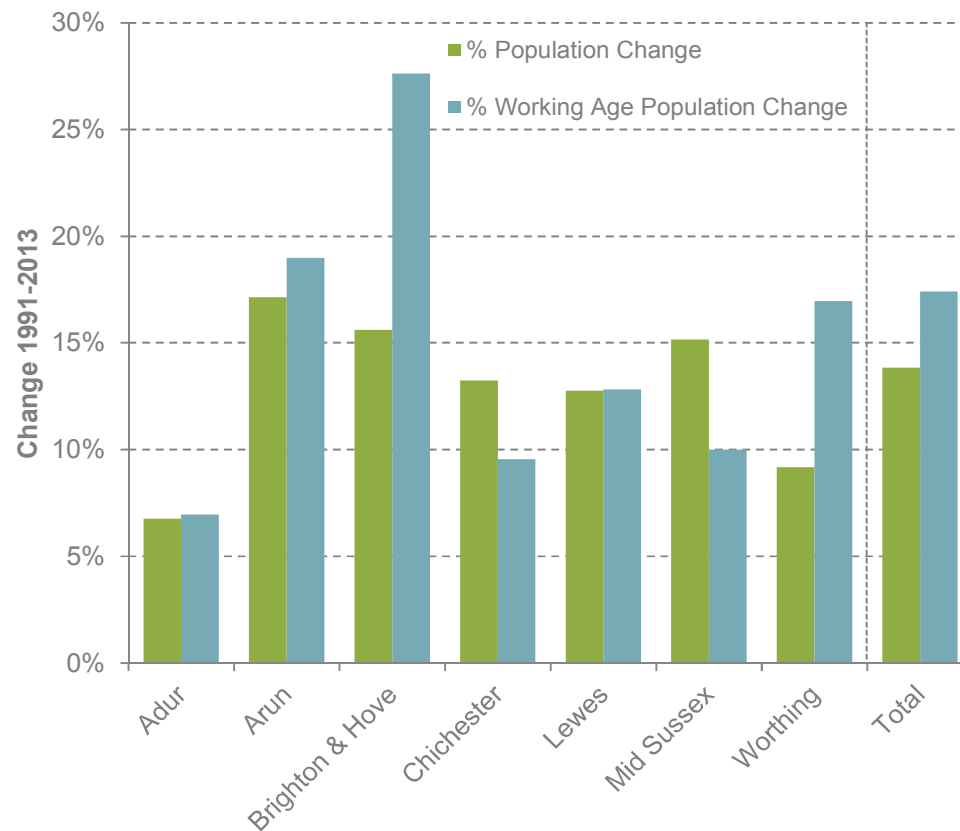
Source: Coast to Capital SEP (2014)

Brighton & Hove is a young city, but elsewhere the working-age population has been growing at a slower rate

Population Age Structure (2013)



Overall Population Growth and Working Age Population Growth – 1991-2013

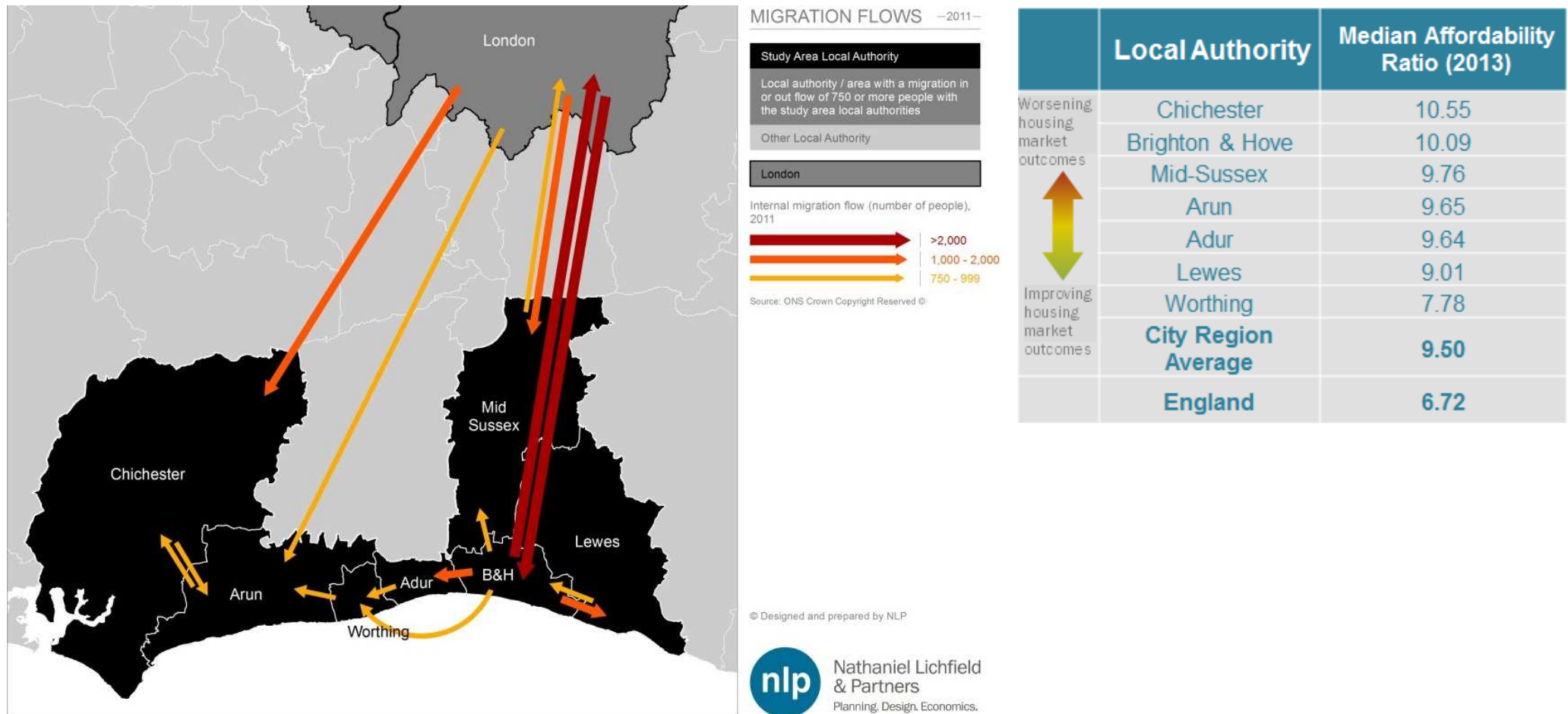


Source: ONS 2013 Mid-Year Estimates

Source: ONS Mid-Year Estimates, 1991 and 2013



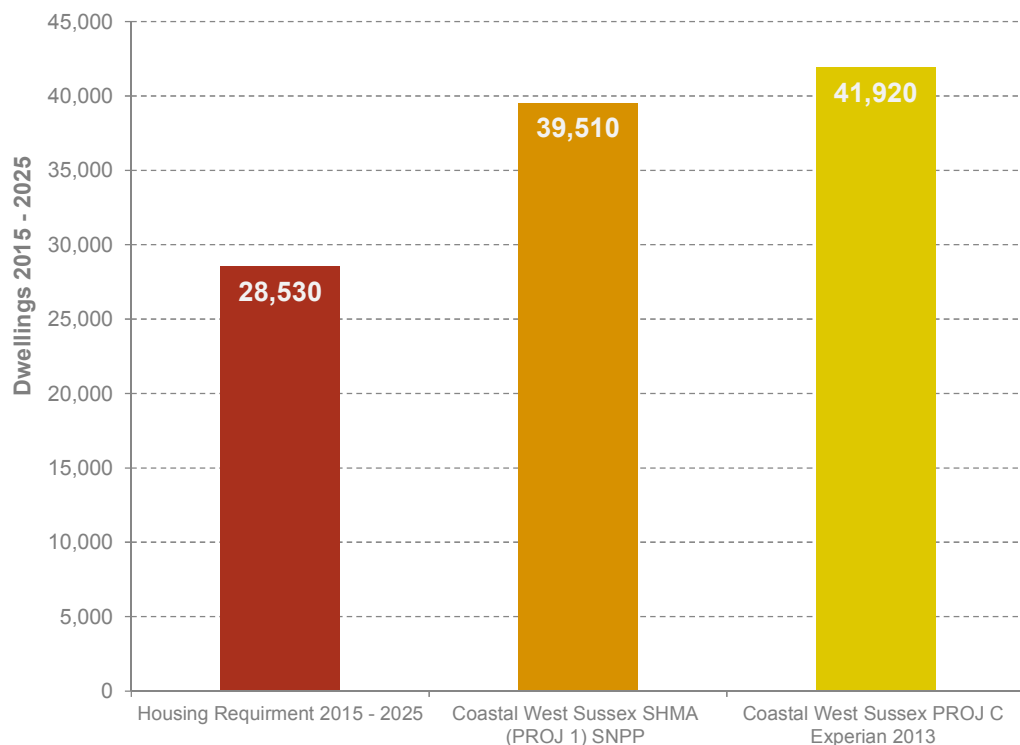
The city region is a net importer of new residents, many of whom arrive in Brighton & Hove and then migrate outwards



- 80% of those moving out of Brighton & Hove within City Region are of working age, a high proportion of which are young retirees (50-64)
- Most moves between Brighton & Hove and London are young people and young working adults (age 16-49)

The city region is currently planning for 28,500 dwellings over the next decade, but needs are likely to be greater

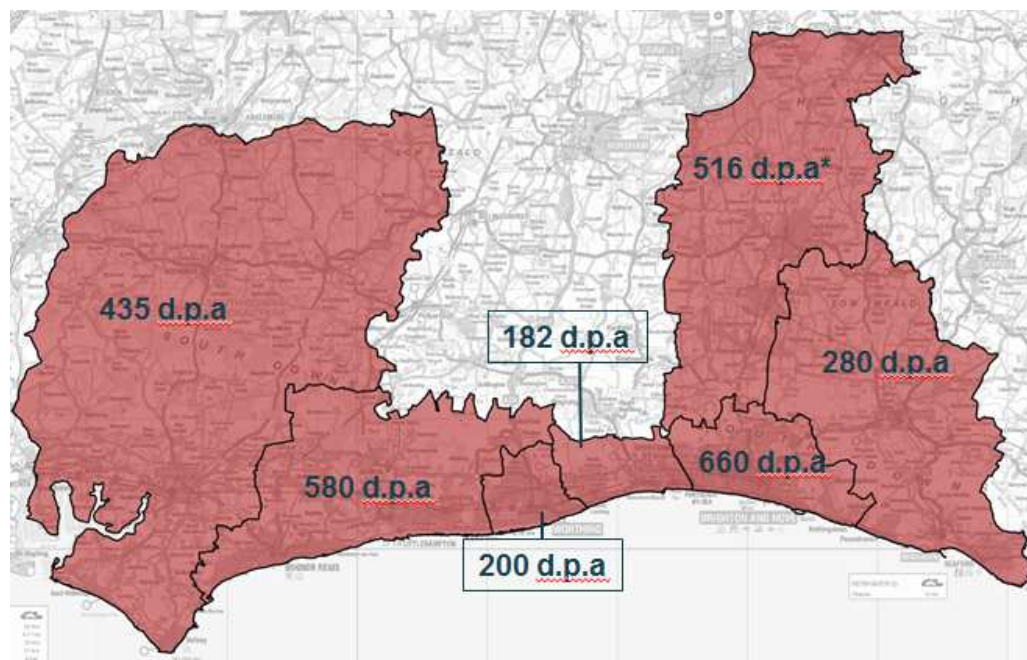
Housing requirements compared to demographic & economic needs



Source: Coastal West Sussex SHMA (August 2013)

* Excludes Mid Sussex

Annualised Rate of Planned Housing Growth in Local Plans (adopted and emerging)

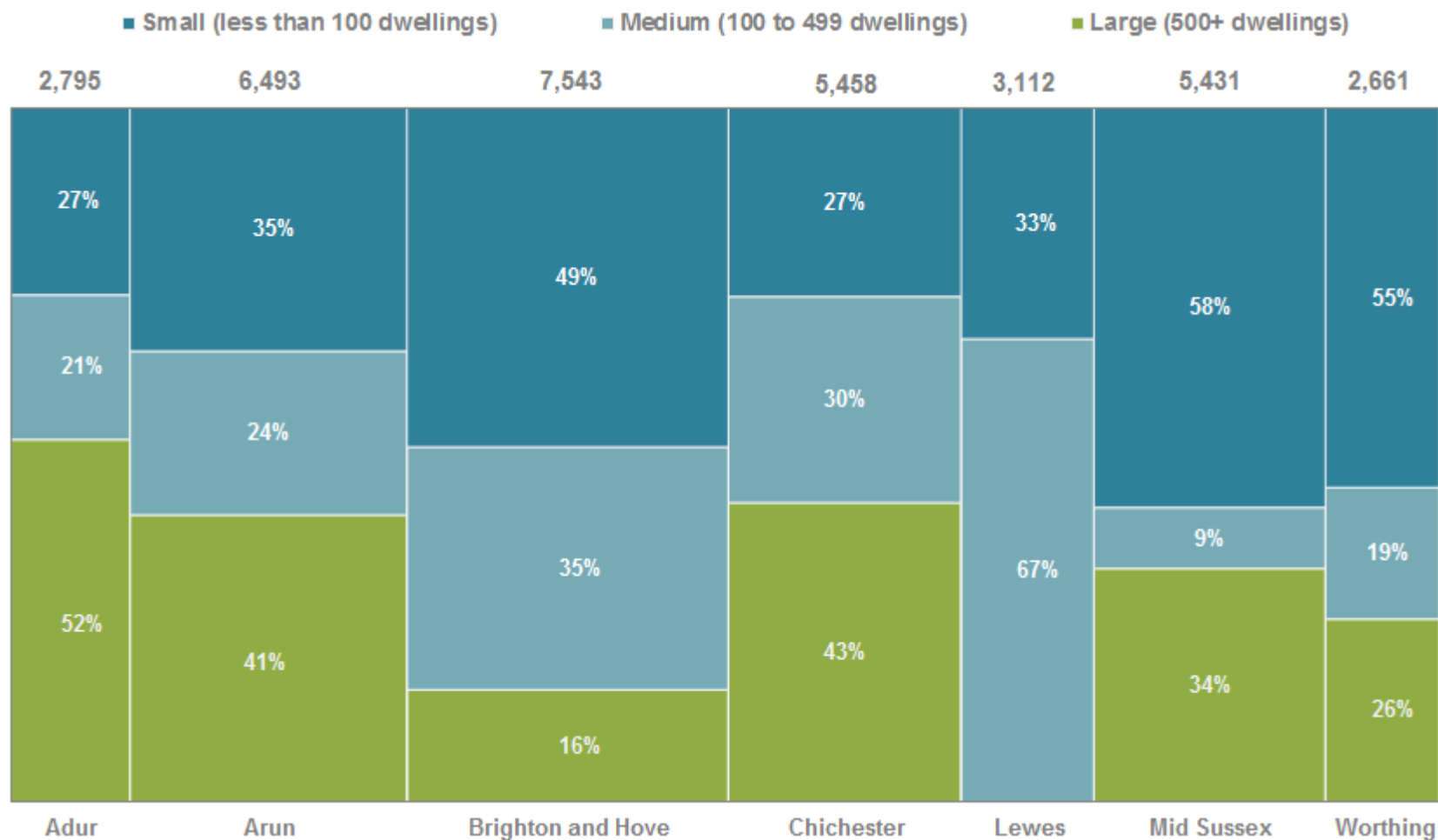


* Latest published position

Source: NLP review of (draft) Local Plans

A significant proportion of the city region's planned supply of housing over the next decade is on large sites

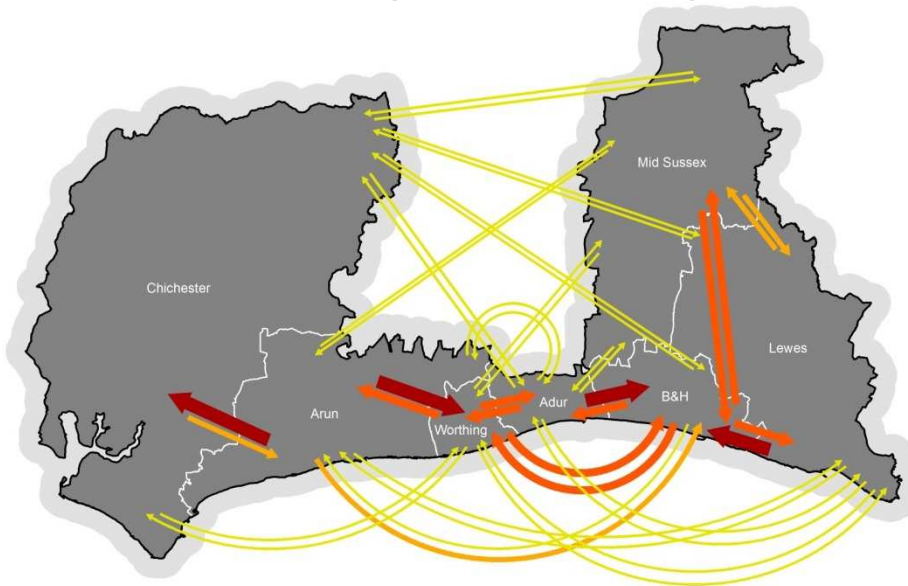
Total Housing Supply by Local Authority 2015 - 2025



Source: Greater Brighton local authority housing trajectories, SHLAA's and monitoring reports

The city region draws workers from a wide area which places a range of trip demands on the network

Intra-regional commuting



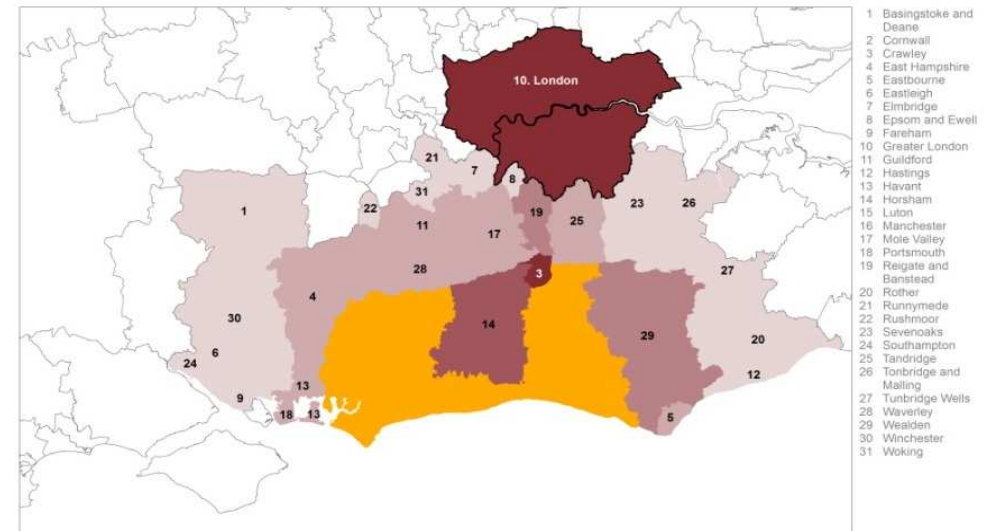
COMMUTING FLOWS – 2011 – Travel to work commuting flow (number of people), 2011. Source: ONS Crown Copyright Reserved ©



- Diverse commuting patterns within Greater Brighton and Coastal West Sussex
- The general commuting trend is from rural to metropolitan areas, with the majority travelling short distances to neighbouring districts
- Road and rail capacity constraints on the corridors east and west of Brighton, mean that the region cannot accommodate growth without investment

GB & CWS Outflows

- Of the commuters leaving GB & CWS 5,000-10,000 commute to neighbouring districts such as Horsham
- Over 10,000 commute to Crawley
- 25,000 commute to London daily representing 7% of the regions working population
- The number of commuters travelling on the Brighton to London services still plays a larger role on commuting patterns than the West Coastway Line.



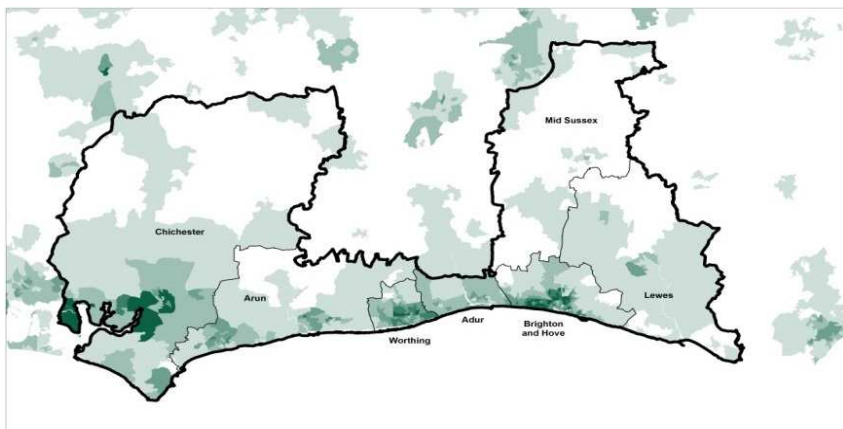
COMMUTING FLOWS – 2011 – Travel to work study area out-commuting flow (number of people), 2011, by Local Authority



Source: ONS Crown Copyright Reserved ©

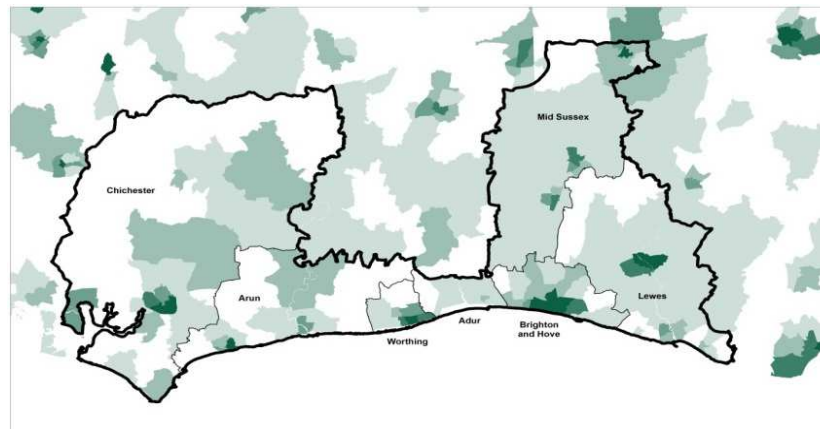
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Non-car modes have grown significantly in Brighton but lag in other areas due to patchy or constrained provision



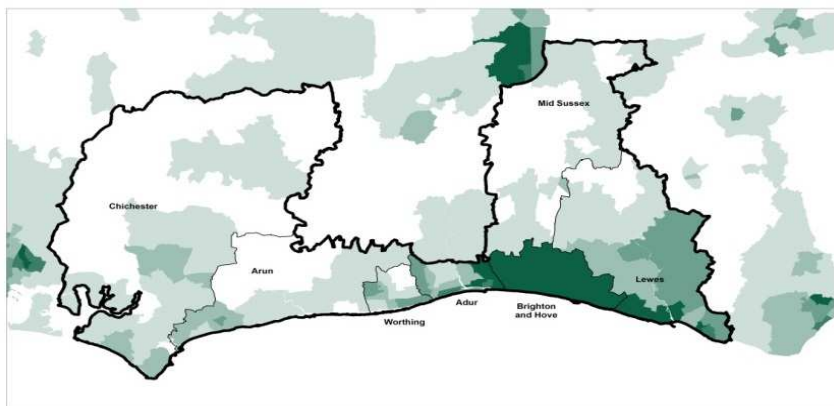
Method of travel to work, 2011, by LSOA: Bicycle
 <1.0% 1.0% - 2.0% 2.1% - 3.0% 3.1% - 4.0% 4.1% - 5.0% >5.0%
 Source: ONS Crown Copyright © nlp Nathaniel Lichfield & Partners Planning, Design, Economics.

Cycling: Has a mode share larger than 5% in city centres.



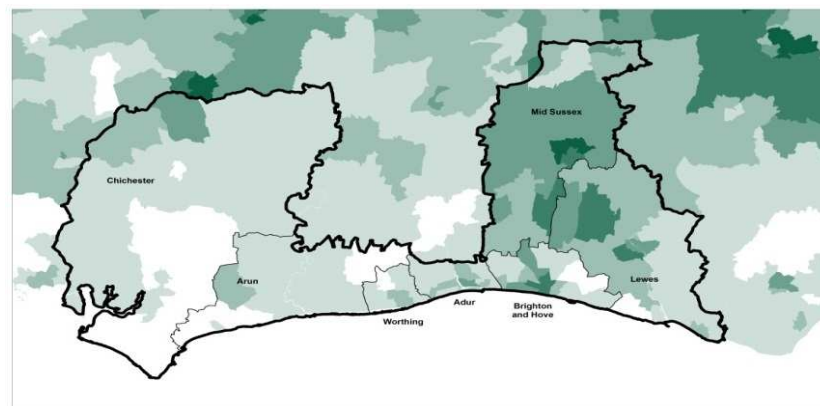
Method of travel to work, 2011, by ward: Walking
 <5.0% 5.0% - 7.5% 7.6% - 10.0% 10.1% - 12.5% 12.6% - 15.0% >15.0%
 Source: ONS Crown Copyright © nlp Nathaniel Lichfield & Partners Planning, Design, Economics.

Walking: Represents greater than a 15% mode share in cities where there is local based employment.



Method of travel to work, 2011, by ward: Bus
 <1.0% 1.0% - 2.0% 2.1% - 3.0% 3.1% - 4.0% 4.1% - 5.0% >5.0%
 Source: ONS Crown Copyright © nlp Nathaniel Lichfield & Partners Planning, Design, Economics.

Bus: Predominant only in Greater Brighton and Hove



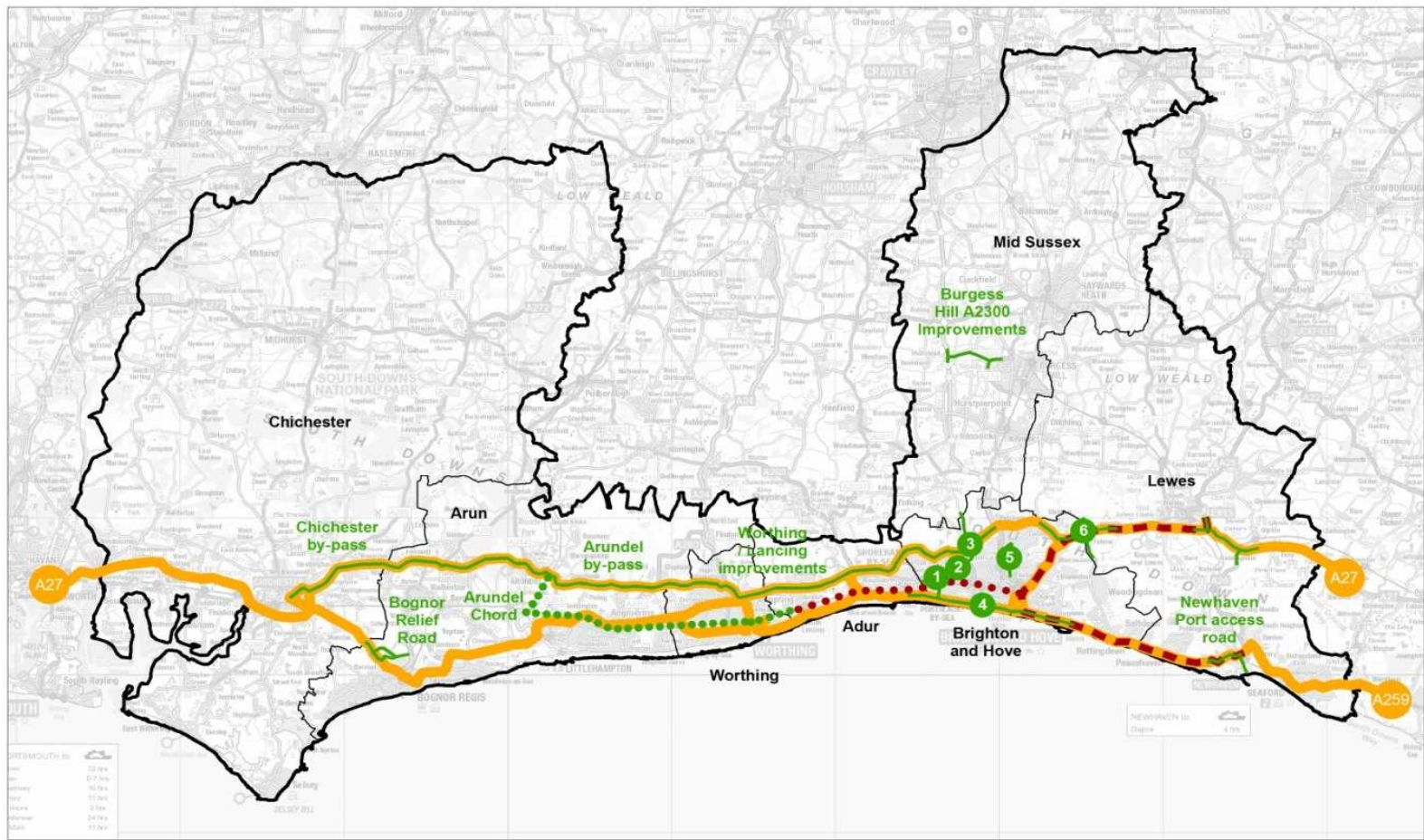
Method of travel to work, 2011, by ward: Train
 <2.5% 2.5% - 5.0% 5.1% - 7.5% 7.6% - 10.0% 10.1% - 12.5% >12.5%
 Source: ONS Crown Copyright © nlp Nathaniel Lichfield & Partners Planning, Design, Economics.

Train: Relatively dominant in smaller towns (reflecting London centric commuting)



Parts of the city region's transport network operate more effectively than others, but new investment is planned

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Commuting Growth Pinchpoints	Proposed Transport Schemes		
Road	Road	1 Portslade	4 Brighton City Centre Seafront
Rail	Rail	2 Toads Hole Valley	5 Valley Gardens
Bus		3 Dyke Road Junction	6 Falmer Junction



- Significant investment proposals are being supported and funded to ease the current capacity constraints along the A27.
- These investments include major work to be done on the Chichester, Brighton and Arundel bypasses, Worthing/Lancing improvements, Newhaven Port Access Road and Lewes Access Road improvements.





Cross-cutting themes

Greater Brighton is an attractive place to live and work, but with success there are also underlying tensions

Strengths to build on:

- Young and growing population (in some areas)
- High growth economy with high-value sectors
- Leading location for business start-ups
- Home to three universities
- Leading visitor economy and cultural offer (city, coast, National Park)

Tensions to address:

- Growing population and changing living patterns place strains on housing and transport
- Economic change poses labour market challenges, with overall benefits but not for all groups
- Businesses can't always find the accommodation they need ('move on')
- High quality of life and cultural excellence could be impacted by unmanaged growth

A city region approach is required to help address the future balance of jobs and population growth

- Series of complex inter-relationships at play
- Likely to be further in-migration to the city region:
 - Helps support working age population (and therefore job growth)
- Some dependence on in-commuting from adjoining areas, but increased competition for productive workers (Crawley, Greater London)
- Current high levels of high skilled out-commuters – more need to be retained through growth of higher value, higher paid jobs locally
- Need to look within city region as well as outside to meet housing needs: affordability is a pressing issue
- Not just about the numbers - collectively the city region needs to cater for different housing market needs to help retain population and workers: “ladder” approach (flats, family homes, retirement accommodation).

Spreading growth opportunities will require allowing each location to meet its own strengths

- Can/should economic activity be more widely distributed to enable all parts of the city region to capitalise on leading growth sectors?
- Recognise that not all locations can meet the needs for all sectors:
 - Identify key strengths and opportunities for clustering
 - Analyse position in the value chain
 - Consider future opportunities for expansion
- Polycentric growth strategy means complementary offer for the benefit of the city region overall, not just individual locations
 - Define a 'role' for each part of the city region
 - Start-ups vs scale-ups (retaining businesses in the region)
- The “missing middle” in employment land supply – what fills the gap between small-scale space and strategic sites? Is this an opportunity for some locations?

An early action plan is required for strategic sites if they are to contribute effectively to meeting development needs

- Nearly 60% of planned future housing supply on medium/large sites
- Four employment sites expected to deliver over 100,000 sq.m
- Need to bring forward delivery of strategic sites:
 - if realistic phasing/delivery is to be achieved over the next decade
 - mitigate against potential ‘smash and grab’ housing developments on other sites that impact on infrastructure capacity etc
- Perception of ‘oven-ready’ sites not always reflected in reality:
 - technical work sometimes absent
 - infrastructure needs not always established
- Potential to identify a strategic sites ‘champion’ to co-ordinate progress
- Need to engage with wider range of developers/housebuilders into the region to improve capacity and create competition to drive delivery

The city region needs to embrace the opportunity for coherent multi-modal transport strategy to allow for growth

- Hypothesis: creating opportunities for non-car modes creates some head room for economic growth where it otherwise would be constrained
- City region has to harness all the transport tools available to maximise on the opportunities for growth but these might not suit localised objectives
- Across the region this might be a diverse range of car-based and non-car initiatives
- Coherent understanding of what and where e.g. increasing cycling or bus mode share where economic growth is focused or removing infrastructure bottlenecks where housing is expected, will deliver most gains for all
- An emphasis on road based initiatives could result in negative growth feedback through congestion dis-benefits
- Local cooperation is key to understanding the wider network impacts of improvements to transport provision as it relates to the economy



Towards a city region approach

The city region needs to “speak with one voice” to articulate both its potential and also where it needs support to grow

- Brighton & Hove captures the headlines – build on this to develop a broader narrative for the city region as a whole
- Where does the city region regard as its peer group, what lessons can be learned?
 - PUSH
 - Oxford City Region
 - Greater Cambridge
- Better make the external case for investment
- Takes time to embed approach



The LSS needs to provide a clearer view on how the choices and trade-offs across the city region will be managed

- Review of Local Strategic Statement (LSS) provides an early opportunity to:
 - explain the 'story of place' (this work)
 - make a statement of intent regarding the city region and its future positioning
 - provide greater direction in terms of economic priorities in different parts of the city region
 - establish a basis for developing a city region integrated transport strategy
 - more clearly identify resources in support of strategic site delivery
- Revisit strategic objectives and spatial priorities to reflect progress made to date (including Local Plans) and more specifically guide investment and resource priorities to support these



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