

Coast to
Capital

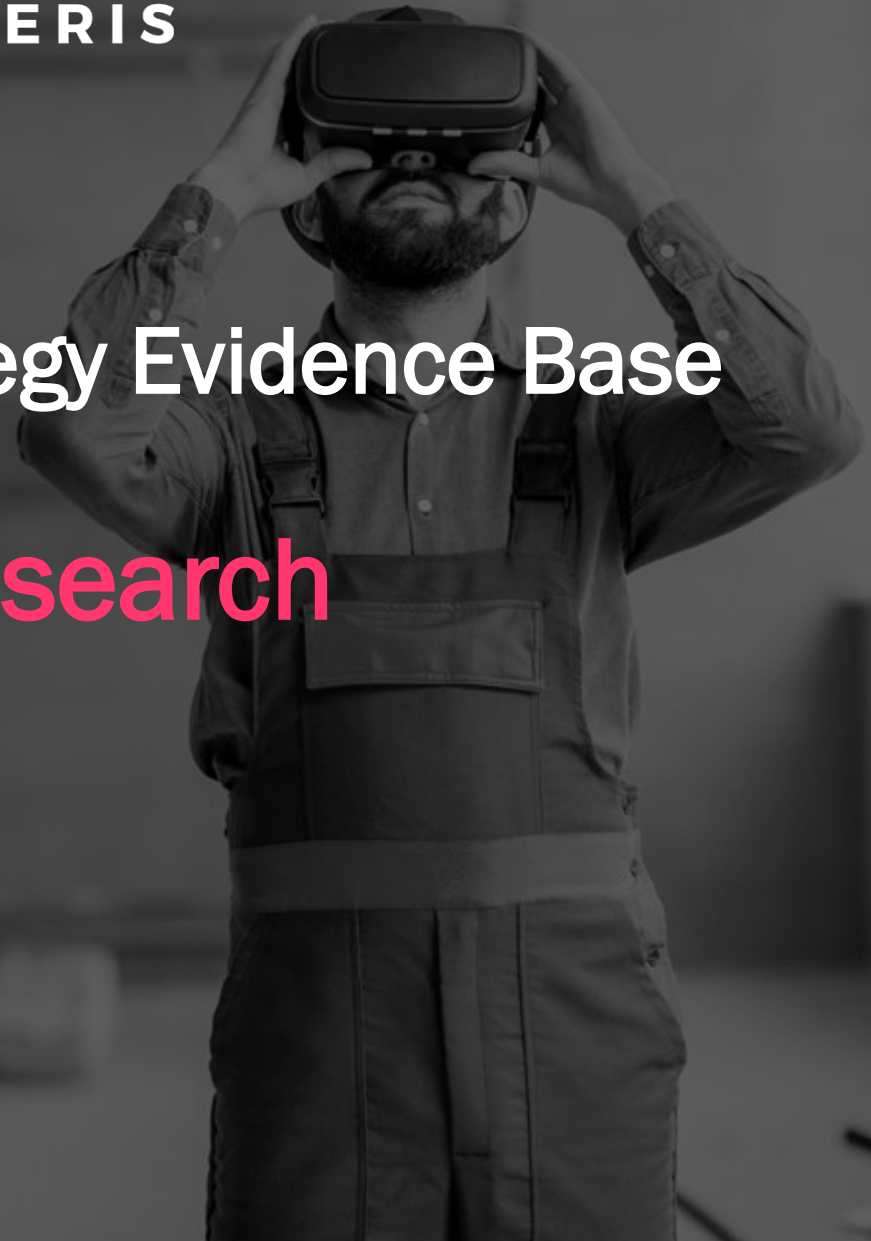


HATCH
REGENERIS

Coast to Capital
Local Industrial Strategy Evidence Base

Urban Centres Research

October 2019



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Research Purpose

This report provides a detailed evidence base on Coast to Capital's network of Urban Centres. It has been produced to form part of the evidence base to support the development of Coast to Capital's Local Industrial Strategy.

What is the Purpose of the Urban Centres Research?

Delivering Prosperous Urban Centres is the first of the eight core priorities identified within Coast to Capital's Strategic Economic Plan, Gatwick 360⁰. The priority underpins the LEP's vision that *"by 2030, it's towns and cities will be known around the world as fantastic places to live, grow and succeed"*.

To deliver against this vision, Coast to Capital committed to establishing a more detailed understanding of urban centres across the LEP area, exploring the extent to which clear local visions exist for sustainable economic growth and prosperity across the area.

The Urban Centres Research responds to this commitment, providing a robust evidence base to help the LEP better understand growth priorities and potential for Coast to Capital's urban centres. The research has been undertaken by Hatch Regeneris in partnership with Coast to Capital and explores:

- + The regeneration 'need' and 'opportunity' in each Urban Centre
- + The barriers which have the potential to constrain delivery
- + The rationale for Coast to Capital and government intervention and the 'added value' that this can deliver.

The research provides granular evidence to support the development of Coast to Capital's Local Industrial Strategy. Crucially, the evidence is targeted at supporting the development of a compelling business case for Government funding to deliver Coast to Capital's vision, in doing so laying the foundations for more dedicated and intensive support for regeneration work to deliver local plans across the area.



Urban Centres Assessment Framework

Given the diversity of Coast to Capital's Urban Centres, a clear framework was needed to set the parameters for research and to guide the data collection process.

In developing a framework, the focus was on establishing a means of comparing a diverse set of urban centres, and of understanding the comparative need and case for future intervention.

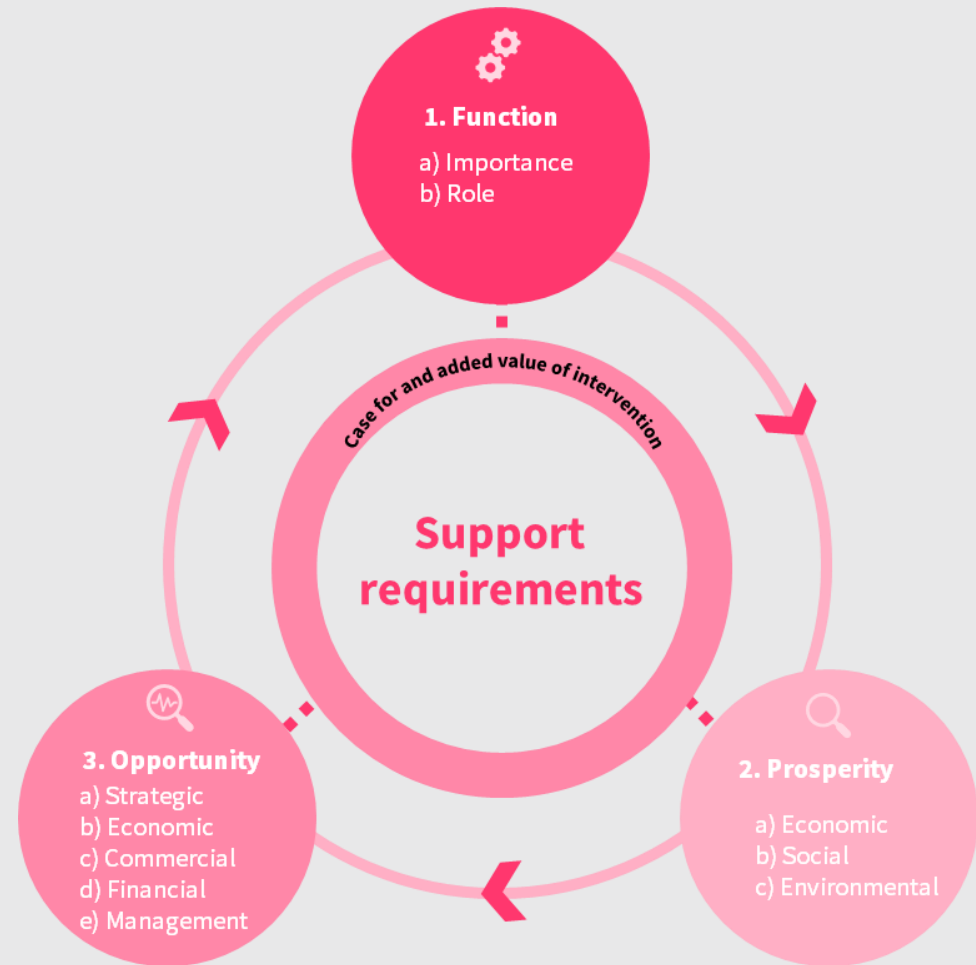
The assessment was developed in partnership with the Coast to Capital team, and was tested with the Coast to Capital counties and local authorities at a briefing session in July 2019. The framework focuses on three broad areas of assessment:

- + **Function:** what is the economic function and role of each urban centre, and what is their contribution towards Coast to Capital's economic prosperity?
- + **Prosperity:** how are urban centres performing from a social, economic and environmental perspectives, and what are their key challenges and 'needs'?
- + **Opportunity** – what is the nature of local economic aspiration and what headroom is there for future growth?

Assessment of these three broad areas provides a robust basis to consider future support needs of each urban centre, and, linked to this, the case for public sector intervention.

The function, prosperity and opportunity for Coast to Capital's Urban Centres is explored in chapters 2, 3 and 4 of this report respectively. Support needs are explored in chapter 5.

Coast to Capital Urban Centres Research: Framework for Assessment



Research Approach

The assessment framework was used to guide an intensive programme of research comprising both desk-based and primary research - collating and analysing both quantitative and qualitative data.

The research comprised four strands of activity:

1. **Developing the Assessment Framework and Defining the Urban Centres:** the initial task was to establish a clear platform for the research. Alongside the development of the research framework (see previous page), initial research was undertaken to define the urban centres. In total, 29 urban centres were identified, using a population threshold of 10,000 residents and above. More information is provided on this in Chapter 1.
2. **Statistical analysis:** using Lower Super Output Areas (LSOAs), bespoke statistical geographies for each individual urban centre were created. The research has primarily relied on data published by the Office for National Statistics (ONS) and has incorporated a broad range of datasets relevant to each of the three assessment phases. Further information on these datasets is provided in the table to the right.
3. **Consultation:** desk-based research was supplemented with consultations with constituent local authorities through one-to-one opportunity assessments and two group workshop sessions. The following organisations have been consulted on the research:
 - + **Unitary authorities** – London borough of Croydon and Brighton and Hove
 - + **Upper tier authorities** – West Sussex County Council and Surrey County Council
 - + **District and borough councils** – Adur and Worthing, Arun, Chichester, Crawley, Epsom and Ewell, Horsham, Lewes, Mid Sussex, Mole Valley, Reigate and Banstead, Tandridge
4. **Analysis and interpretation:** information from tasks 2 and 3 was collated and assessed in-line with the research framework. Information provided by council officers was supplemented with information from adopted planning documents to assess the development pipeline. Findings were tested with officers from all local authorities at a second round table briefing session in September 2019.

Coast to Capital Urban Centres Research: Framework for Assessment

Assessment phase	Evidence
Function	<ul style="list-style-type: none"> ONS Mid-year population estimates ONS Business Register and Employment Survey – employment and business intelligence ONS origin destination data
Prosperity	<ul style="list-style-type: none"> MHCLG Indices of Multiple Deprivation Local Data Company – Town Centre Vacancy data Co-star data on commercial vacancy ONS Census (labour market data)
Opportunity	<ul style="list-style-type: none"> Evidence from Council officers Adopted planning documents Co-star evidence on commercial demand and values MHCLG data on housing delivery performance.



Executive Summary

1. Defining Coast to Capital’s ‘Urban Centre’s

Coast to Capital is home to a diverse network of 29 Urban Centres with a population of 10,000 people or more. Together, these accommodate the majority of the LEP’s population and economic activity. They underpin regional identity and in many cases enjoy national recognition as desirable places to live, work and visit.

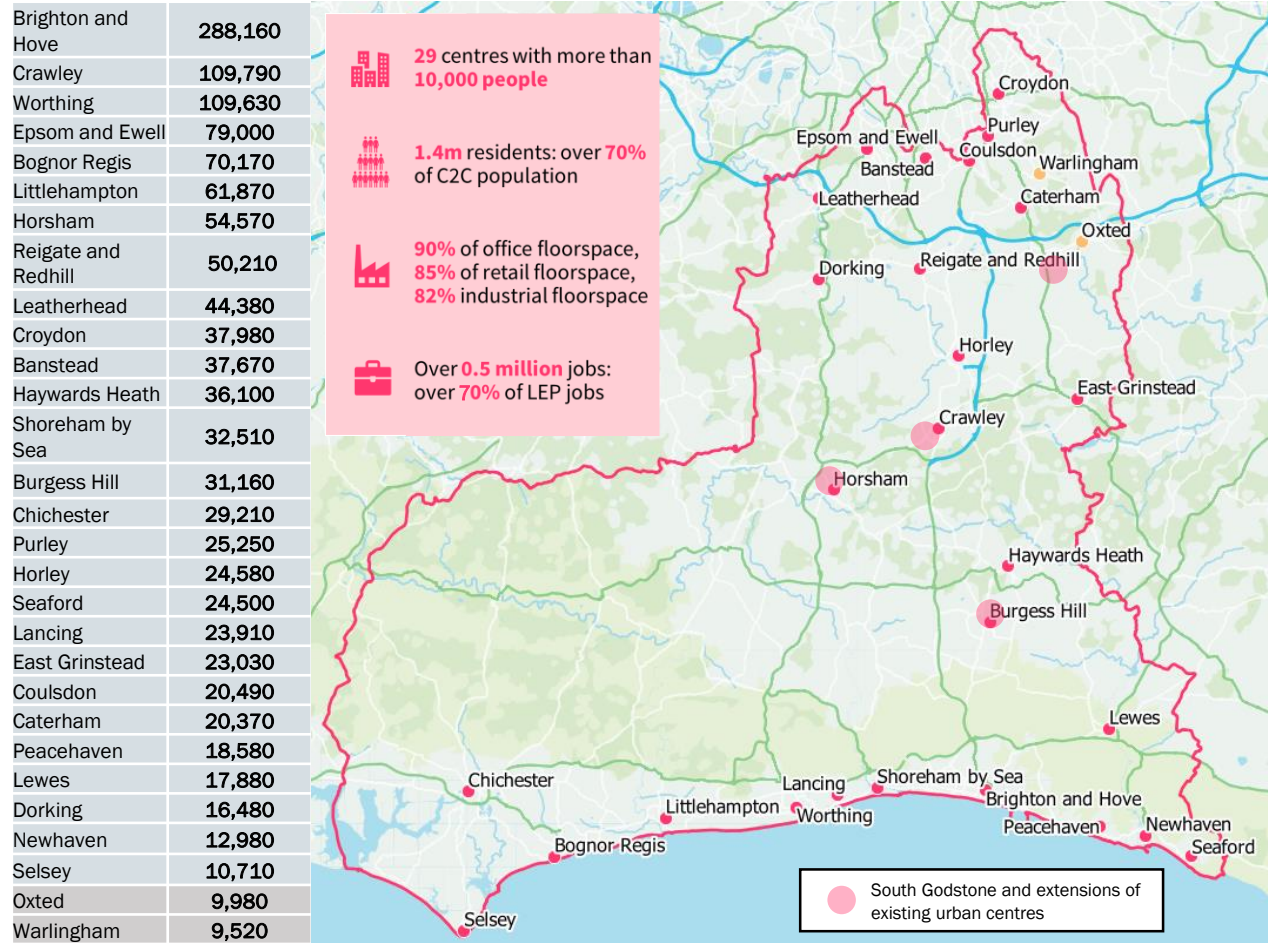
The focus of the research is on urban centres in the broadest sense – concentrating on hubs of population rather than more narrowly defined town centre areas or employment hubs.

The ‘urban centres’ have been defined using an ONS definition of urban areas as places of 10,000 people or more.

There are 27 such centres across the Coast to Capital area. A further 2 centres (Oxted and Warlingham) have been included in the assessment given they fall only marginally below the 10,000 threshold.

Across the area there several high profile proposed developments that will fundamentally change the future composition of the LEP’s urban centres. This includes proposals for South Godstone Garden Village in Tandridge and significant plans for major urban extensions of existing centres such as the land west of Ifield in Horsham District.

Coast to Capital’s Network of Urban Centres: towns with a population of c. 10,000 or more



2. Comparing Economic Function and Diversity Across Coast to Capital's Network of Urban Centres

Coast to Capital's urban centres are highly diverse in terms of their size, the economic role that they play, and the markets which they serve. Analysis of respective urban centre 'function' provides a starting point for the comparative assessment of the centres, and of their relative future support needs and focus.

The assessment of economic function focuses on understanding economic size, critical mass and capacity of Coast to Capital's 29 urban centres.

The analysis has been used to group the urban centres into three main categories:

- **Primary productivity drivers:** Coast to Capital's three largest urban centres (Brighton & Hove, Crawley and Croydon), which act as the dominant economic hubs across the area, with significant economic critical mass and serving employment and amenity needs on a regional basis
- **Sub-regional economic hubs:** the second tier of urban centres in terms of size and in terms of relative importance from an economic critical mass perspective. Alongside the primary productivity drivers, these still play important roles as employment hubs for Coast to Capital
- **Service focused hubs:** Coast to Capital's smaller urban centres. While these still are an important source of employment, their primary economic function is focused around serving the amenity needs of local residents.

This typology is summarised in the map to the right, with full analysis provided in Chapter 2 of this report.

Mapping the function of Coast to Capital's urban centres



3. Comparing Prosperity Across Coast to Capital’s Network of Urban Centres

Levels of economic, social and environmental prosperity vary significantly across Coast to Capital’s network of urban centres. Lowest levels of prosperity and the greatest levels of need are found within coastal communities, where challenges remain deeply embedded.

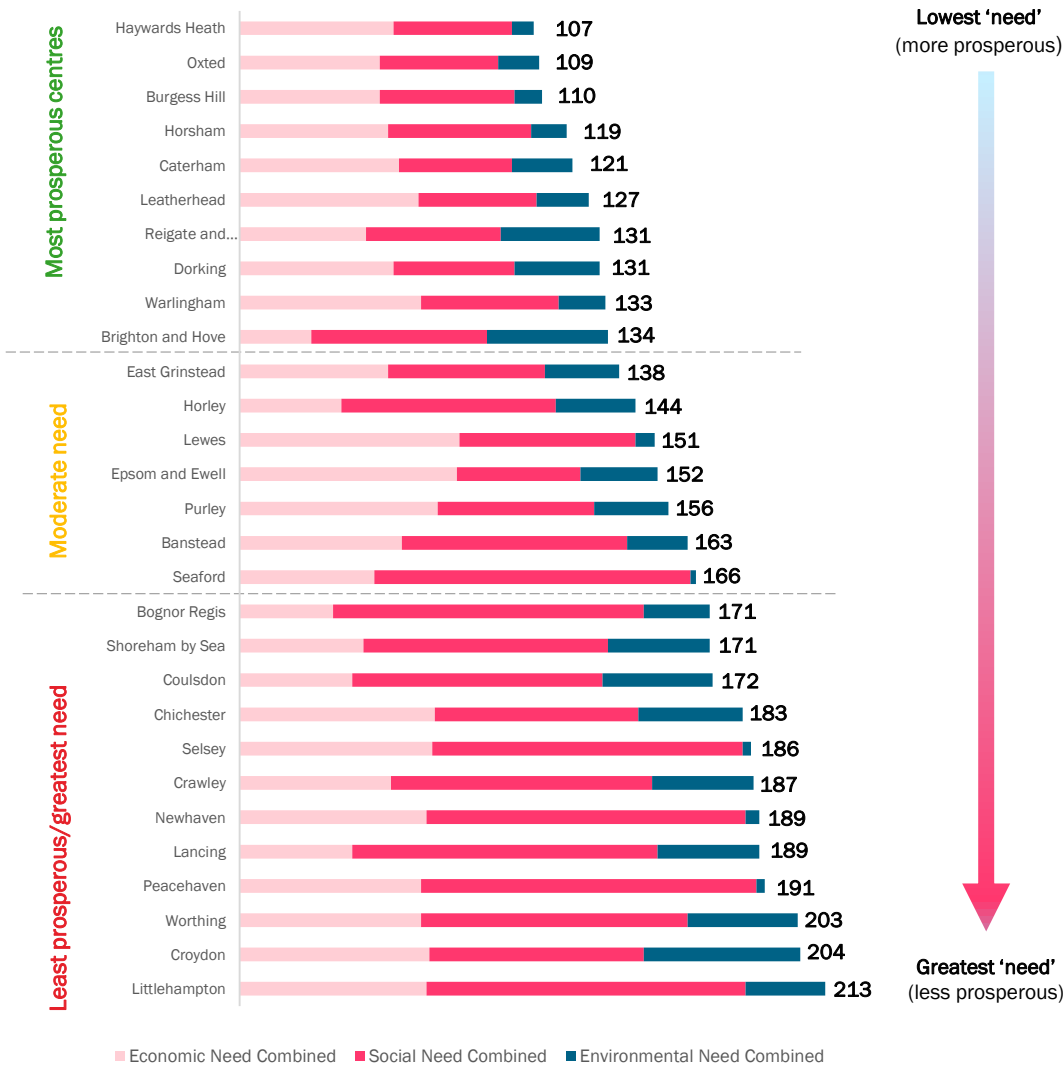
The research has taken a holistic approach to assessing the current character and performance of the urban centres, considering three aspects of ‘prosperity’:

- **Economic prosperity:** the vitality of the urban centres from an economic perspective, focusing on employment trajectory, the quality of employment and the vibrancy of the commercial property market.
- **Social prosperity:** the prosperity of the resident population of each centre, focusing on population characteristics, economic participation and overall levels of income and inclusion.
- **Environmental prosperity:** the quality of the living environment taking into account access to green space and air quality.

A range of statistical indicators have been used to compare each of the urban centres against these three areas of prosperity, with the findings used to produce a ‘composite’ prosperity score.

The findings are summarised in the table to the right, with the analysis set out in full within Chapter 3. While Coast to Capital is typically regarded as a ‘prosperous’ place, clear disparity exists within the area. This is particularly the case for ‘social prosperity’ where deeply embedded challenges in economic participation and social wellbeing continue to characterise certain urban areas (particularly those within coastal areas).

Composite score of prosperity assessment metrics



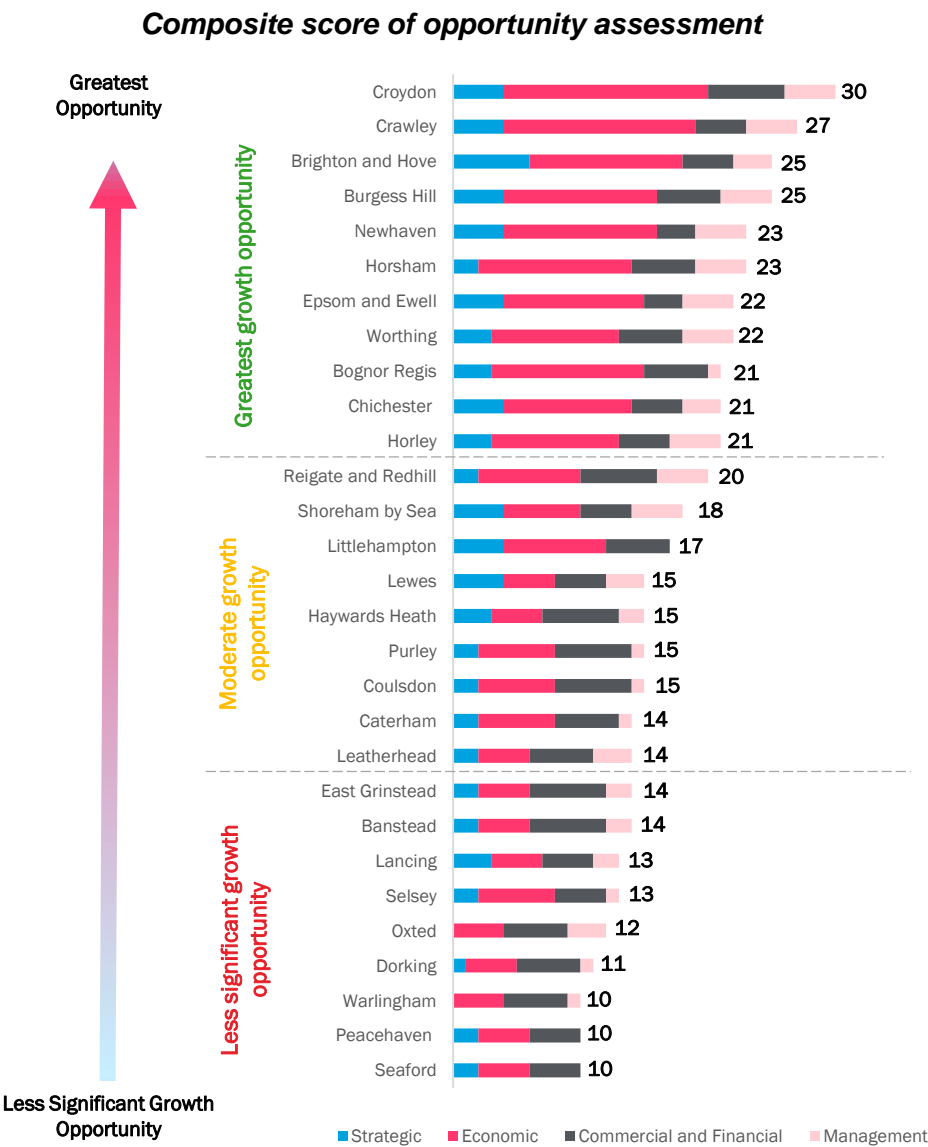
4. Comparing Opportunity Across Coast to Capital’s Network of Urban Centres

The research highlights the significant opportunities which exist across the network of urban centres and which will play an integral role in shaping the region’s future prosperity. These range from opportunities which are ‘transformational’ and regionally significant, to opportunities which have a more local scale and level of importance.

Local opportunity has been considered against a common set of strategic, economic, commercial and financial, and delivery considerations. The assessment brings together a mix of qualitative and quantitative metrics. Alongside quantitative desk-based research, individual consultations were held with each constituent local authority and the two county councils to understand local ambitions, headroom for future growth and barriers to delivery.

The findings are summarised in the table to the right, with the analysis set out in full within Chapter 4. There is greatest opportunity and capacity for growth in Coast to Capital’s ‘primary productivity drivers’. This is underpinned by the scale of growth planned for these centres as well as the viability and deliverability of proposals within these centres. Despite this, opportunity is not exclusive to these centres and a large number of the region’s smaller centres will be vital for accommodating future growth in the region.

Many of the centres that received a lower opportunity score are heavily constrained spatially, which is limiting the capacity for growth. Equally, many of the lower scoring opportunity centres serve a primary function as ‘service centres’ and are not the primary growth focus for their respective local authorities.



Note: the higher the score, the greater the opportunity; economic scoring has a weighting of 2

5. Understanding Urban Centre Growth Barriers and Strategic Support Needs

While the Urban Centres are the focal point for Coast to Capital's economic headroom and opportunities, the research has highlighted both strategic and local constraints which have the potential to act as a barrier to growth. Understanding and responding to these will be key to realising local opportunity and aspiration.

Consultation with the local authorities has highlighted a number of overarching / strategic barriers which are common across the Urban Centres in constraining performance and growth. These include:

1. **Geographic and spatial challenges:** one of Coast to Capital's greatest assets is the quality and diversity of its physical landscape but for many urban (e.g Green Belt and National Park restrictions)
2. **Strategic transport challenges:** strategic transport challenges are cited as a fundamental factor impact on local prosperity, but also future growth – both in terms of movement between urban centres (the Brighton Mainline and major highways routes such as the A27), and local access to the towns (local bypasses, junctions, and access routes to new developments).
3. **The supply of employment land across Coast to Capital:** across nearly all of the urban centres, employment land was cited as a key factor undermining local economic performance and potential. This reflects both the loss of existing space over recent years, a lack of strategic approach to planning for future space needs across sub-regions and market areas.
4. **Delivery mandate:** across parts of Coast to Capital, increasing challenges are being experienced regarding local consensus on future economy and growth aspirations, and hence the 'mandate' for delivery. While this is particularly an issue in rural areas, it is increasingly common within urban areas.

Aside from these cross-cutting constraints, there are also a range of more granular and local barriers and constraints which are specific to each urban centre; further information on these is provided in Chapter 5.

The future vitality of Coast to Capital's network of urban centres will be defined to some extent by the response to these barriers.

Strategic action to lobby for the needs of the area as a whole and to respond to common areas of need and constraint will need to form part of the response.

Local authorities consulted via the research were clear on a number of cross cutting points:

- + The needed for long term confidence and certainly regarding future strategic approaches and investment plans
- + The importance of strong partnership working and collaboration across the sub-region to respond to areas of need and constraint which cannot be resolved locally (e.g. housing and commercial property, labour market, and strategic transport challenges).

Further common messages from local authorities regarding future support needs for urban centres include the need for:

- + Strategic support and intervention to bring forward delivery of complex sites
- + Ongoing support for cross-boundary plan making and greater support for local plan making, strategy development and case making
- + Support for the development a local and regional investment pipelines
- + Longer term funding commitments from government to enable greater commitment from local and regional partners
- + Ongoing financial support and investment for smaller scale and locally specific projects (e.g. town centre enhancements).

6. Drawing Conclusions on the Local Support Needs of Coast to Capital's Network of Urban Centres

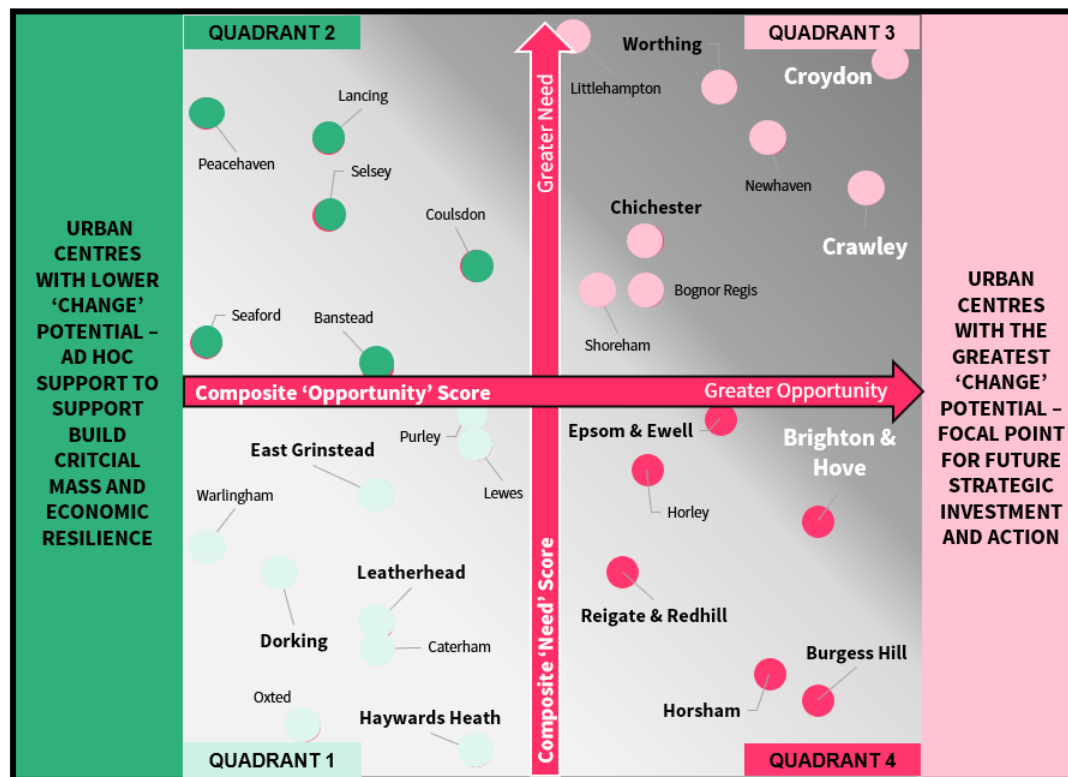
While the research has highlighted common 'strategic' support needs, the diverse nature of Coast to Capital's urban centres necessitates a place specific approach, with the response tailored to the local context.

The comparative assessment of function, prosperity and opportunity has provided a basis from which to compare and differentiate between the support needs of urban centres. This analysis is summarised in the chart to the right, with four main groups of urban centres identified:

- Areas with less 'change potential':
 - Quadrant 1 – comparatively prosperous, less significant opportunity: focus on maintaining local resilience and competitiveness
 - Quadrant 2 – greater need, less significant opportunity: focus on: targeted action to respond to specific areas of need with a focus on building prosperity
- Areas with greater 'change' potential:
 - Quadrant 3 – greater need, more significant opportunity: strategic investment to unlock opportunities, with a focus on using growth as an opportunity to respond to need and build prosperity
 - Quadrant 4 – comparatively prosperous, more significant opportunity: strategic investment to unlock opportunities, maintaining and strengthening local resilience in doing so.

It should also be noted that the analysis marks a snapshot at a certain point in time, and that the context of different urban centres will inevitably evolve over time. However, the analysis provides the basis for recommendations regarding the spatial and thematic targeting of future support and investment for Coast to Capital's urban centres.

Categorisation of Differing Support Needs and Focus Across the Urban



Key: Typeface of place names relates to current economic function for full typology:

Primary productivity drivers

Sub-Regional hubs

Local service centres

7. Recommendations

The Urban Centres research provides a granular assessment of the form and function of Coast to Capital's urban centres and provides a clear steer on focal points for future action. It is a 'live' evidence base which should provide a platform for greater collaboration across the region in strategic and local plan making and investment.

Recommendations from the research acknowledge the important role of the urban centres as drivers of the Coast to Capital economy. The Coast to Capital Local Industrial Strategy provides an excellent opportunity to position the network at the heart of future discussions regarding the focus of strategic investment. It also provides an opportunity to embed a clearer understanding of the role and value of the network of urban centres as a whole, recognising that the need and case for investment is rapidly evolving, and that a collaborative, agile and long term approach will be needed to maintain and enhance the 'prosperity' of the network.

In looking to take forward the findings of this research, the Local Industrial Strategy should focus on **building a stronger, more resilient and future facing network of centres which provide the focal point for inclusive growth across the LEP over the coming decades.**

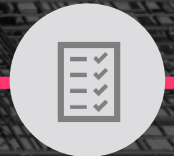
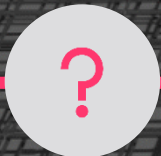
Key focal points for future action are summarised in the table to the right; further detail is provided in Chapter 6.

Recommended Focal Point for Future Action and Investment

Recommendation Area	Recommendation (see Chapter 6 for full detail)
A. Developing the Support and Investment Pipeline	A1. Defining the support package: using the LIS to establish a clear package of support for urban centres – from capital investment to revenue support and local capacity building A2. Visioning and Strategy: supporting local authorities with the development of clearer visions and strategies for urban centres to help define future support needs and investment A3. Pipeline Development: working with authorities across the area to define a longer term investment pipeline across urban centres
B: Cross boundary working to tackle strategic barriers across the urban centres	B1. Cross-Boundary Planning – continuing to encourage collaboration at the sub-regional level to respond to issues around supply of homes, commercial space and community infrastructure B2. Strategic Infrastructure – continuing to prioritise cross area working to secure investment in major strategic infrastructure needed to unlock growth.
C: Targeting support spatially to reflect areas of greatest need and opportunity	C1. Focused support for urban centres with greatest potential for 'change': prioritising future investment on the urban centres where need and opportunity is greatest (effectively quadrants 3 and 4 in the chart on the previous page) C2. Strengthening socio-economic resilience across smaller urban centres: continuing to provide smaller scale and more ad hoc support for other urban centres where a clear case can be made (effectively quadrants 1 and 2 in the chart on the previous page).
D: Focusing support thematically to support more distinctive, resilient and competitive town centres.	D1. Town centre vitality – supporting efforts to diversity and evolve the offer of town centres across the area D2. Commercial Space – enhancing the supply of employment space across urban centres D3. Assets and Anchors – working collaboratively to better maximise the value of key education, cultural and visitor economic assets and anchors D4. Local Accessibility – continuing to prioritise investment in enhancing local connections, with a focus on future modes of travel.



Chapter 1: Why Urban Centres?



1.1. What are Coast to Capital's urban centres?

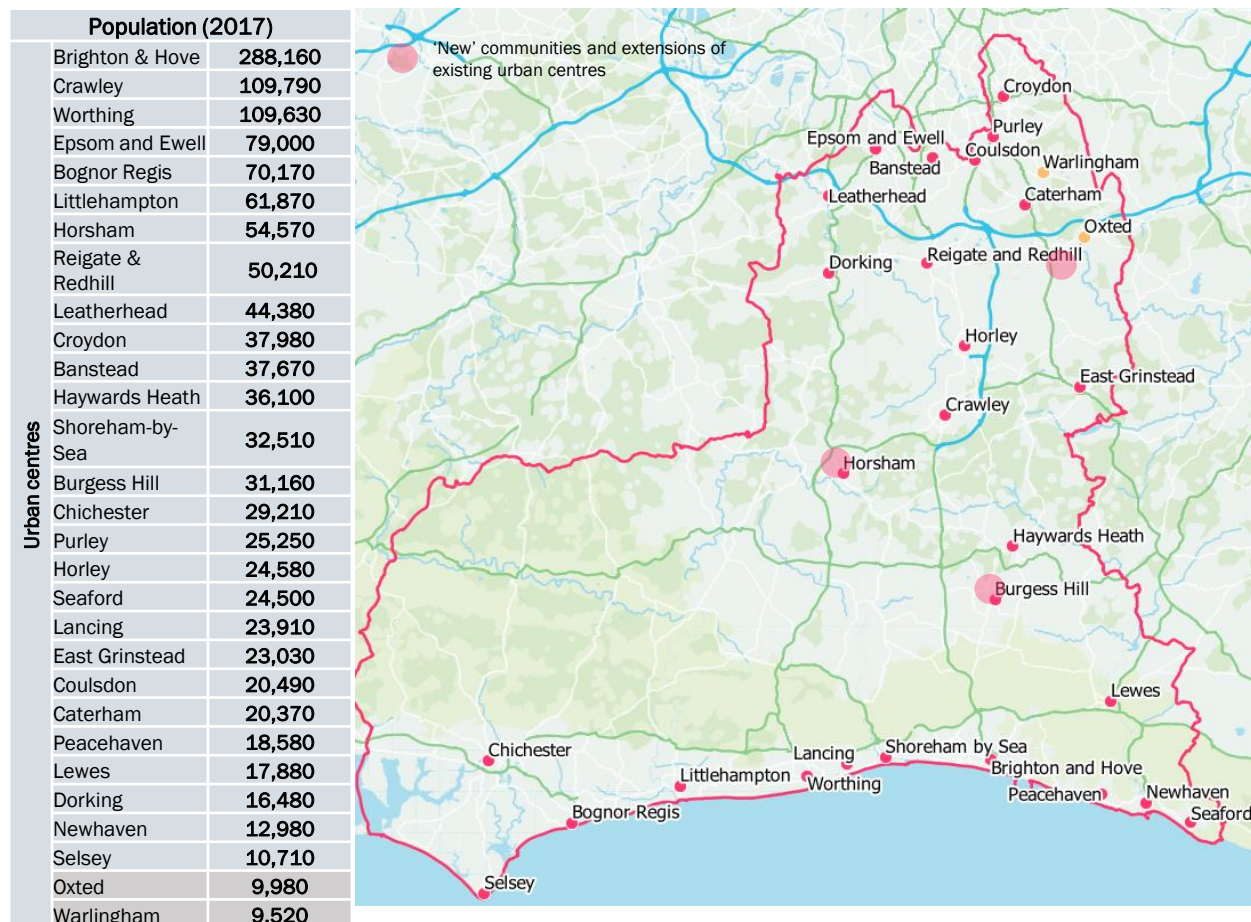
For the purposes of this research 'urban centres' have been defined as areas containing concentrated hubs of population. Rather than seeking to define narrow town centre boundaries, urban centres have been defined as the wider built up area to capture all significant economic activity.

Using the ONS rural urban classification, an area is typically considered to be rural if it is outside of settlements with more than 10,000 resident population. Therefore, in the Coast to Capital sub-region there are a number smaller settlements which are not considered as an urban centre within this study.

There are two centres (Oxted and Warlingham) which currently fall just below the 10,000 population threshold but have been included within this assessment. This is due to the development pipeline in both of these centres, as it is forecast that they will grow to beyond a 10,000 resident population in the near future.

There are also several high profile developments that will fundamentally change the future composition of the area's urban centres. This includes proposals for South Godstone Garden Village in Tandridge and significant plans for major urban extensions of existing centres such as the land west of Ifield in Horsham District.

Identifying Coast to Capital's urban centres



? Chapter 1: Why Urban Centres?

1.2 The Geography of the Urban Centres

Coast to Capital's urban centres are highly diverse, each with a unique set of challenges and opportunities. However, centres are bound by shared themes which characterise the LEP area and impact their potential to accommodate future growth.

Shared spatial characteristics

Coast to Capital is a large and complex area: this research is predicated on the importance of embedding a more locally focused approach to understanding performance and opportunity.

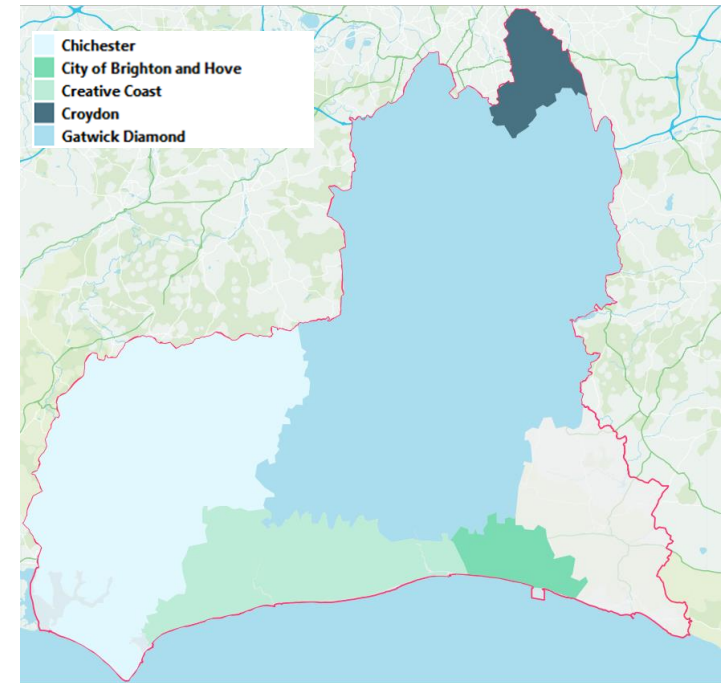
Wider research into the area (such as the complimentary Commercial Property study) has previously sought to take a spatial focus to characterising places and market areas (see map, top right). Whilst this approach has not been used for this study, urban centres within these areas can be grouped by a range of shared characteristics:

- + **Coastal centres** – these centres are restricted spatially and many of these tend to have deeply embedded deprivation challenges
- + **Gatwick diamond centres** – many of these centres are characterised by significant green belt constraints, high residential values and are net exporters of labour
- + **Rural centres** – these centres are also typically constrained by green belt, contain more amenity employment and host a retail offering more focused on serving the needs of the local population
- + **Croydon and Brighton** – higher quality employment but also pockets of concentrated deprivation

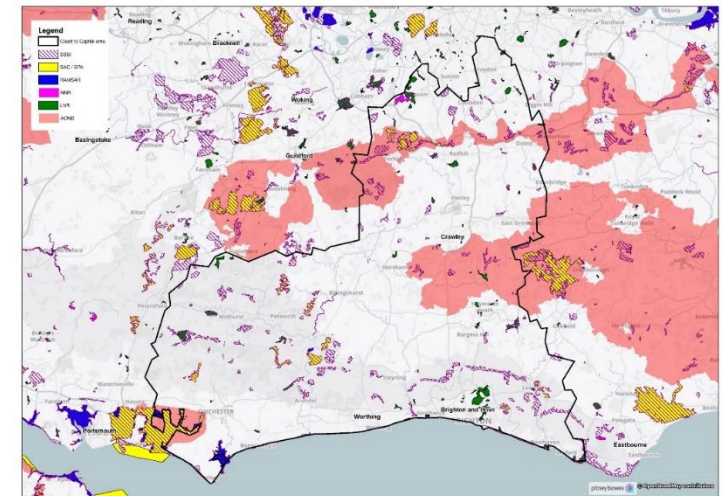
Natural environment

Coast to Capital is defined by the quality of its physical and natural environment and this is an important driver for attracting people to live and work in the area. However, this has implications for the growth of urban centres. Many centres (especially in the north of the area) are constrained by green belt, national parks and AONBs - restricting the space for development.

Coast to Capital's commercial property market areas



Natural capital assets: protected areas



1.3. The Economic Importance of Coast to Capital's Urban Centres

Coast to Capital's network of Urban Centres accommodate the majority of the LEP's population and economic activity. Centres embody regional identity and are nationally recognised as desirable places to live, work and visit.

The Urban Centres contain the region's key retail and leisure with specific function and importance varying significantly from place to place. Whilst Brighton and Hove hosts a regionally significant retail offer, many smaller centres provide more local convenience offering serving surrounding rural communities.

The Urban Centres are home to significant cultural assets including the Hawth Theatre in Crawley, Fairfield Halls in Croydon, and the Brighton Pavilion Estate. The region's centres are steeped in history and heritage buildings within urban centres such as Chichester represent a principle asset. These assets mean that centres are also the focal point for region's the visitor economy. The region's natural capital underpins the offering of urban centres. Tourism is the largest sector in several of the region's coastal communities, and the accommodation and service sectors in many of the smaller centres benefit from their proximity to the South Downs and Areas of Outstanding Natural Beauty (AONB).

Urban centres host the region's innovation infrastructure and centres of education. The Universities of Chichester, Brighton and Sussex are all located within urban centres as well as nationally recognised Further Education and school institutions.

The success of Coast to Capital's urban centres will continue to define the prosperity of the region as a whole and will be integral to driving the LEP's future productivity gains. Centres are earmarked to be the focal point for future growth, making it even more expedient to understand their current contribution and future growth constraints.

Snapshot of the Economic Footprint of Coast to Capital's Urban Centres



29 centres with more than 10,000 people



1.4m residents: over 70% of C2C population



90% of office floorspace, 85% of retail floorspace, 82% industrial floorspace



Over 0.5 million jobs: over 70% of LEP jobs

1.4. Strategic Focus and Momentum

Reflecting their economic importance, the urban centres are at the forefront of strategic policy and ambition – both for the LEP and for the counties and local authorities.

Gatwick 360

In 2018, the Gatwick 360 Strategic Economic Plan was launched by Coast to Capital. This established the vision for the area to become “the most dynamic non-city region in England” by 2030.

Eight key economic priorities were identified as being at the heart of this plan, including Priority 1, “Delivering Prosperous Urban Centres”. This priority established the need to focus on urban centres in order to develop a more sustainable economic base which is less reliant on London. This identified the following development ambitions for the region’s towns and cities:

- + 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.

County Place ‘Ambition’ and ‘Deals’

LEP investment has been complimented by a strategic focus from the region’s upper tier authorities. West Sussex County Council’s ‘Place Deals’ and Surrey County Council’s ‘Place Ambition 2050’, bring together strategic and local aspiration to understand how the public sector can work together to realise the potential of urban centres.

Public and Private Sector Investment

Reflecting the above, investing in the growth and rejuvenation of the region’s towns and cities has been a priority for public sector expenditure in recent years. Regeneration funding for urban centres has been a principle focus of current and previous LEP funding through Local Growth Fund (LGF).

Public investment has been matched by substantial private investment which is driving prosperity and opportunity within urban centres. For example, Butlin’s has recently invested £35m in their facilities in Bognor Regis, enhancing the local tourism offer and providing the potential drive wider enhancements in town centre vitality.

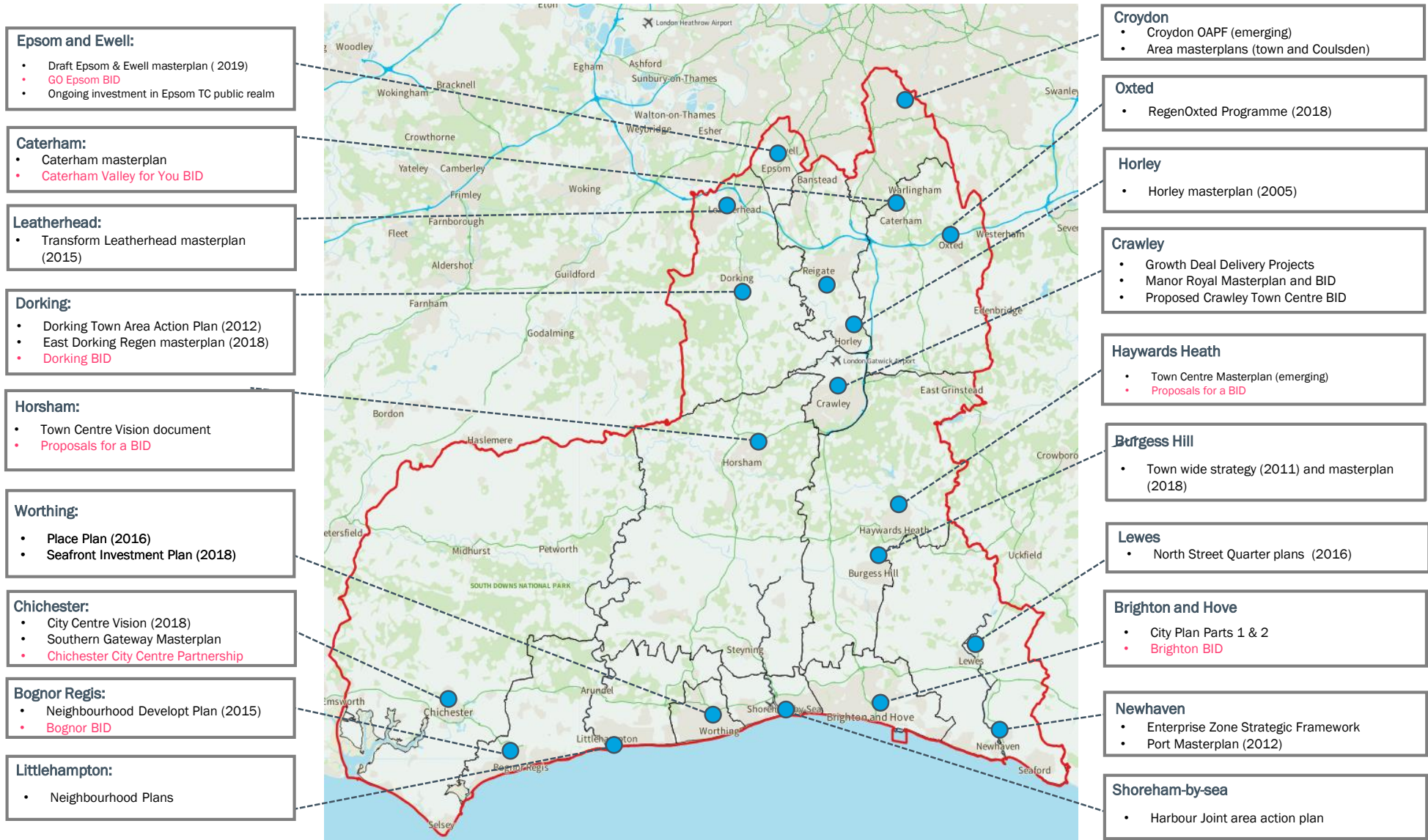
Financial investment is underpinned by sub-regional collaboration to tackle broader strategic issues affecting Coast to Capital’s urban centres. This includes the Greater Brighton Economic Board which is focused on securing investment for the area, and authorities around Gatwick who are collaborating to understand how Gatwick Airport can be better utilised to drive growth and provide jobs and investment in their areas.

Local Aspiration and Strategy

Locally, the level of strategic visioning and action varies from Urban Centre to Urban Centre. A snapshot key local momentum in this respect is provided overleaf.

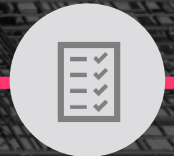
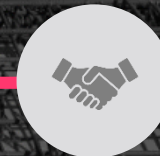
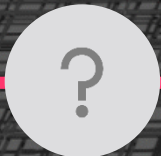
1.5. Local Momentum and Investment

Snapshot of Key Urban Centre Strategies, Plans, Delivery Bodies (marked in red), and Investment





Chapter 2: The Function of Coast to Capital's Urban Centres





Chapter 2: The Function of Coast to Capital's Urban Centres

2.0. Introduction

This chapter explores the function of the Coast to Capital's urban centres. The 29 centres are highly diverse in terms of their size, in terms of the economic role that they play, and in terms of the markets that they serve. The analysis provides a starting point for the comparative assessment of the centres, and of their relative future support needs and focus.

The assessment of economic function focuses on understanding economic size, critical mass, capacity and focus. Six metrics key metrics have been used to underpin the assessment, as summarised in the table below. Each urban centre's performance against these metrics has been used characterise the function of each centre, with broad typologies facilitating a deeper understanding of the economic role of all 29 centres. The conclusions of the assessment are summarised in section 2.6.

Function Assessment: Key Metrics Used for the Analysis

Function Metrics	
	Population: size of the urban centre
	Proportion of working age residents: size of the potential workforce
	Number of jobs: identifying Coast to Capital's key economic hubs
	Amount of commercial floorspace: concentration of Coast to Capital's commercial activity
	% of amenity employment: character of employment within the urban centre
	Jobs: people ratio: assessing economic densities it

Chapter contents:

Sub-Sections	Overview
2.1. Population	Understanding the size of Coast to Capital's urban centres and where population is concentrated
2.2. Size of the economy	Understanding what Coast to Capital's key employment centres are
2.3. Commercial and retail character	Characteristics of retail and commercial markets including an analysis of quantities of commercial space
2.4. Employment characteristics	Understanding the typology and dominant characteristics of employment within urban centres
2.5. Economic density and commuting	Understanding areas which are more residential in character and the centres which are net exporters of labour
2.6. Conclusions: Mapping the function of Coast to Capital's urban centres	Bringing together function metrics to map the categorisation of each urban centre.



Chapter 2: The Function of Coast to Capital's Urban Centres

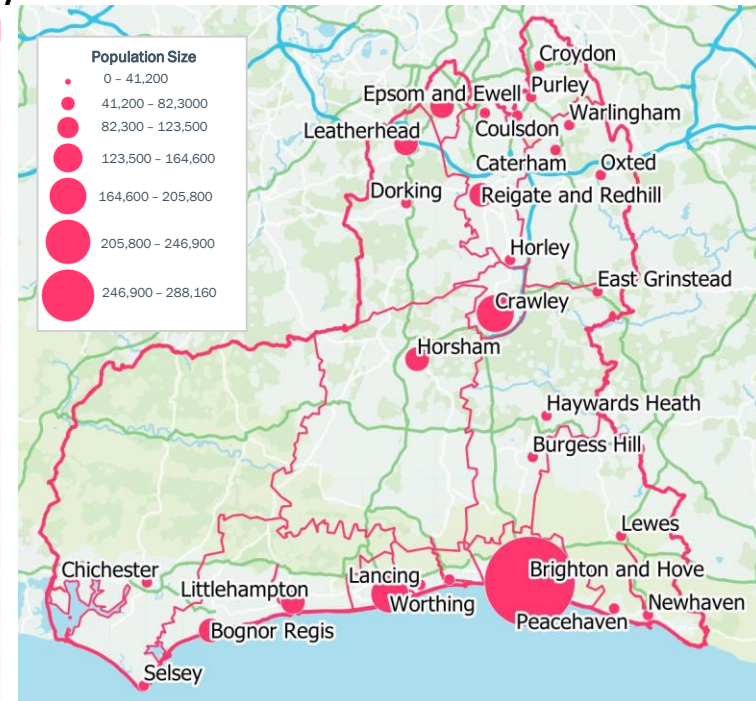
2.1. Population Size

The ten most populated urban centres account for 70% of the total urban centre population. Brighton and Hove, Crawley and Worthing are the region's largest urban centres, with each containing a population of over 100,000 residents.

Expansion of many of these centres (especially in East Surrey) is severely limited by green belt constraints. The Coast to Capital area is therefore characterised by a large number of smaller urban centres - 21 centres have a population of under 50,000 people.

Population Size by Urban Centre, 2017

Urban Centre	Population, 2017
Brighton and Hove	288,160
Crawley	109,790
Worthing	109,630
Epsom and Ewell	79,000
Bognor Regis	70,170
Littlehampton	61,870
Horsham	54,570
Reigate and Redhill	50,210
Leatherhead	44,380
Croydon	37,980
Banstead	37,670
Haywards Heath	36,100
Shoreham by Sea	32,510
Burgess Hill	31,160
Chichester	29,210
Purley	25,250
Horley	24,580
Seaford	24,500
Lancing	23,910
East Grinstead	23,030
Coulsdon	20,490
Caterham	20,370
Peacehaven	18,580
Lewes	17,880
Dorking	16,480
Newhaven	12,980
Selsey	10,710
Oxted	9,980
Warlingham	9,520





Chapter 2: The Function of Coast to Capital's Urban Centres

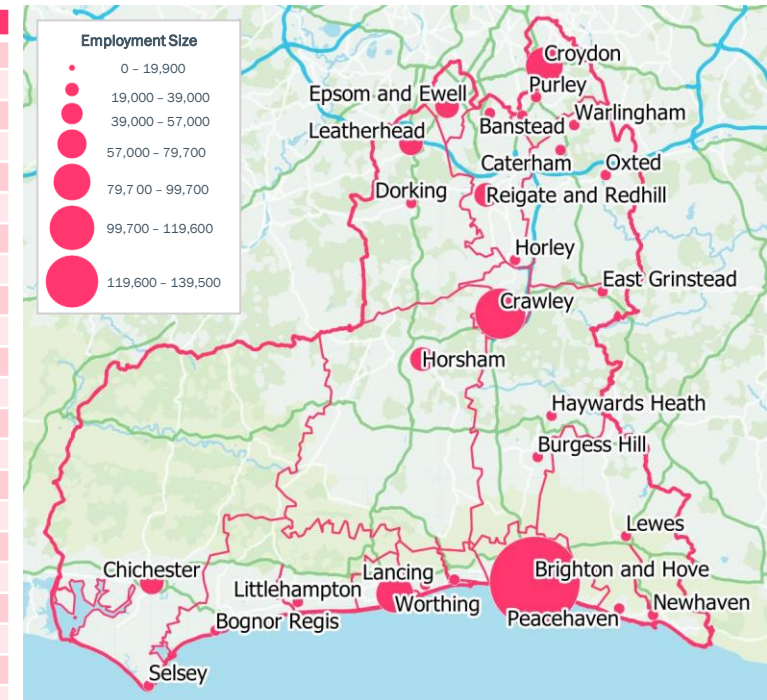
2.2. Size of the Economy

Employment is concentrated in the area's largest centres. Ten urban centres account for 74% of all urban centre employment.

Brighton and Hove and Crawley alone account for 33% of all urban centre employment, reinforcing their importance to the Coast to Capital economy.

Employment Size by Urban Centre, 2017

Urban Centre	Employment, 2017
Brighton and Hove	139,495
Crawley	68,800
Worthing	48,950
Croydon	46,000
Reigate and Redhill	31,050
Epsom and Ewell	30,290
Chichester	26,350
Leatherhead	26,150
Horsham	23,525
Bognor Regis	18,990
Littlehampton	17,395
Burgess Hill	15,425
Haywards Heath	14,075
Lewes	12,355
Shoreham by Sea	11,385
East Grinstead	10,725
Dorking	10,450
Banstead	10,350
Lancing	8,825
Purley	8,250
Caterham	7,100
Horley	6,975
Coulsdon	5,725
Newhaven	5,700
Seaford	4,975
Oxted	4,250
Selsey	3,430
Peacehaven	2,825
Warlingham	2,425





Chapter 2: The Function of Coast to Capital's Urban Centres

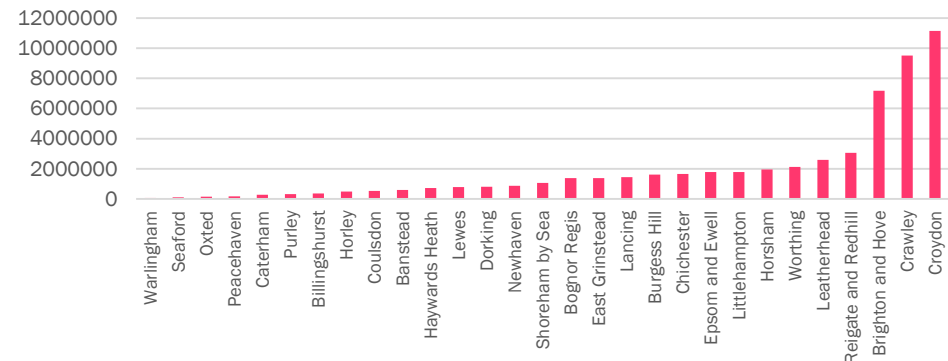
2.3. Commercial and Retail Character

Coast to Capital's urban centres host a range of retail destinations which serve different functions and catchments. 12 urban centres are 'leading comparison and leisure destinations' and act as key retail anchors for the region.

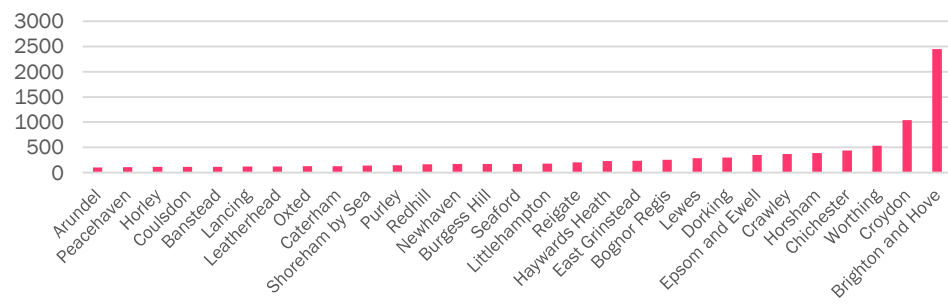
Brighton and Hove is by far the largest retail destination and is comprised of 2,448 retail units.

Croydon, Crawley and Brighton and Hove accounts for 49.8% of all commercial space within urban centres.

Amount of office and industrial floorspace (2018)



Number of retail units per town centre (2019)



Retail Classification (2018)

Dominant Retail Supergroup	Information	Urban Centres
Leading comparison and leisure destinations	These are classified as top shopping destinations and typically serve large population catchments.	Brighton and Hove, Worthing, Bognor Regis, Chichester, Horsham, Crawley, Reigate and Redhill, Horley, Dorking, Epsom and Ewell, Croydon, East Grinstead
Traditional high streets and market towns	Smaller high streets typically located in suburban and rural areas typically specialising in convenience goods and household services	Shoreham-by-Sea, Selsey, Caterham, Coulsdon, Purley, Banstead, Seaford
Primary food and Secondary comparison	Relatively diverse and comprise a mix of multiple and independent retailers/service providers	Littlehampton, Leatherhead, Oxted, Burgess Hill, Lewes, Newhaven
Local retail and service centres	Typically have a large number of competitor centres, with generally a limited retail offer focused on household and consumer services serving the needs of the local population	Peacehaven



Chapter 2: The Function of Coast to Capital's Urban Centres

2.4. Character: Employment Characteristics

To assess the function of the urban centres, the research has analysed employment characteristics within each centre.

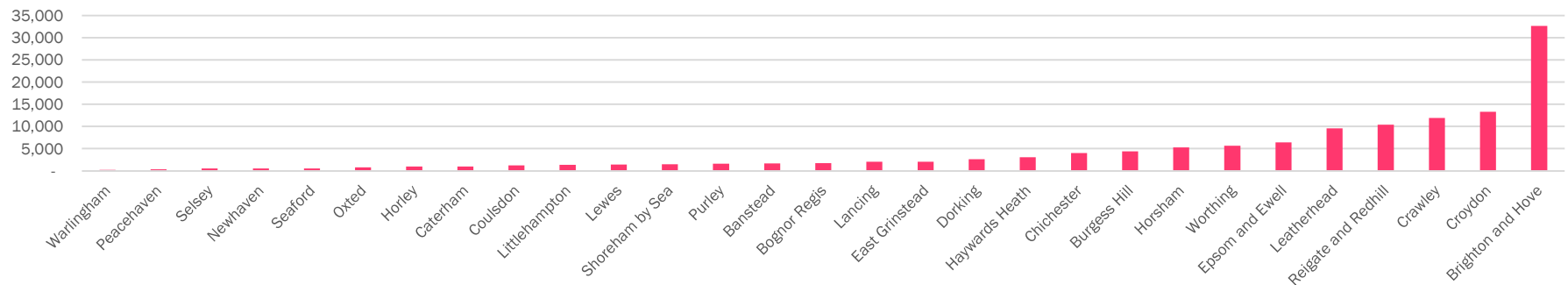
Amenity jobs refers to the proportion of jobs within the economy focused on servicing the local population. This comprises a mix of sectors and activities including leisure, health and public administration. Whilst all urban centres contain less than the England average, there are 11 centres where amenity employment is the most common employment type.

Analysis of knowledge economy jobs in the Coast to Capital area shows that the largest quantity of high value employment is concentrated within the area's larger centres. Despite this, it should be noted that a number of smaller centres (such as Leatherhead) contain a high proportion of knowledge economy employment, which is explored further in the chapter 3.

% Amenity employment per urban centre (2017)

Urban Centre	% Amenity jobs
England	66%
Chichester	63%
Lewes	59%
Seaford	57%
Banstead	55%
Worthing	55%
Littlehampton	54%
Purley	54%
Peacehaven	53%
Oxted	51%
Haywards Heath	50%
Warlingham	50%
Epsom and Ewell	49%
Croydon	47%
East Grinstead	47%
Bognor Regis	46%
Brighton and Hove	46%
Coast to Capital Urban Centre Average	45%
Coulsdon	43%
Shoreham by Sea	43%
Horsham	41%
Caterham	39%
Dorking	37%
Horley	36%
Newhaven	35%
Reigate and Redhill	35%
Lancing	35%
Selsey	34%
Burgess Hill	31%
Leatherhead	29%

Number of knowledge economy jobs per urban centre (2017)





Chapter 2: The Function of Coast to Capital's Urban Centres

2.5. Character: Economic Density and Commuting

The majority of Coast to Capital's urban centres have jobs:people ratios of less than one. This indicates that a significant proportion of centres are more residential in character, reflected by their low economic densities.

This is, in part, underlined by the majority of urban centres being net exporters of labour. Only Crawley, Chichester and Mole Valley are net importers of workers.

Jobs to Working Age Population Ratio, 2017 Ranking of Commuting Flows by Net Change, 2011

Urban Centre	Ratio, 2017
Croydon	1.2
Chichester	0.9
Lewes	0.7
Dorking	0.6
Crawley	0.6
Reigate and Redhill	0.6
Leatherhead	0.6
Burgess Hill	0.5
Brighton and Hove	0.5
Coast to Capital Urban Centre Average	0.5
East Grinstead	0.5
Worthing	0.4
Newhaven	0.4
Horsham	0.4
Oxted	0.4
Haywards Heath	0.4
Epsom and Ewell	0.4
Lancing	0.4
Shoreham by Sea	0.4
Caterham	0.3
Purley	0.3
Selsey	0.3
Horley	0.3
Littlehampton	0.3
England	0.3
Coulsdon	0.3
Banstead	0.3
Bognor Regis	0.3
Warlingham	0.3
Seaford	0.2
Peacehaven	0.2

	Inflow	Outflow	Net change
Crawley	43,230	19,140	24,089
Chichester	24,300	16,320	7,975
Mole Valley	23,810	19,750	4,055
Worthing	16,700	17,900	- 1,200
Reigate and Banstead	32,540	35,930	- 3,390
Brighton and Hove	31,920	37,310	- 5,395
Lewes	14,420	19,930	- 5,510
Adur	9,360	16,460	- 7,190
Epsom and Ewell	15,240	20,350	- 7,810
Tandridge	13,950	22,670	- 8,720
Horsham	16,730	26,850	-10,130
Mid Sussex	20,410	31,940	- 11,530
Arun	8,970	27,390	-18,421
Croydon	39,910	92,620	-52,709
Coast to Capital	280,350	366,740	- 86,390

Note: the figures in pink show which local authorities have more net out-commuters than in-commuters.



Chapter 2: The Function of Coast to Capital's Urban Centres

2.6. Conclusions: Mapping the Function of Coast to Capital's Urban Centres

The network of centres underpins the prosperity of the Coast to Capital economy, and plays a major role in defining sub-regional identity and distinctiveness. Each of the 29 urban centres can be grouped into the following categories based on the data:

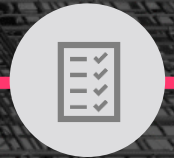
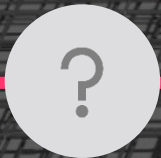
Mapping the function of Coast to Capital's urban centres

Categorisation	Evidence	Urban centres
Primary Productivity Drivers	<ul style="list-style-type: none">Large populationLarge number of jobs and high proportion of working age residentsContains the area's key commercial destinationsLarge clusters of high value employment	<ul style="list-style-type: none">CroydonBrighton & HoveCrawley
Sub-Regional Economic Hubs	<ul style="list-style-type: none">Smaller populations and overall job numbersHigh proportion of high value employmentHigh proportion of working-age residentsSignificant amount of the sub-region's commercial space	<ul style="list-style-type: none">WorthingChichesterBurgess HillHaywards HeathHorshamReigate & RedhillDorkingEpsom and EwellLeatherhead
Service Focused Hubs	<ul style="list-style-type: none">Higher amenity and lower knowledge economy employmentLower economic densityTypically less commercial space	<ul style="list-style-type: none">SeafordPeacehavenNewhavenLewesShoreham by SeaLancingLittlehamptonBognor RegisSelseyEast GrinsteadHorleyBansteadCoulsdonPurleyWarlinghamOxted





Chapter 3. Assessing the Prosperity of Urban Centres





Chapter 3: Assessing the Prosperity of Coast to Capital's Urban Centres

3.0 Introduction

This chapter focuses on the prosperity of Coast to Capital's urban centres. Overall, levels of economic, social and environmental prosperity vary significantly across the network of urban centres. Lowest levels of prosperity and the greatest levels of need are found within coastal communities, where challenges remain deeply embedded.

The prosperity assessment combines a range of metrics to ascertain where the greatest need for intervention is required. To undertake a holistic assessment, three types of prosperity have been considered:

- + **Economic prosperity:** assesses the vitality of the urban centre focusing on employment trajectory, the quality of employment and the vibrancy of the commercial property market.
- + **Social prosperity:** assesses the prosperity of the resident population of each centre to understand some of the factors underpinning economic performance
- + **Environmental prosperity:** assesses the quality of the living environment as well as local pollution levels

To measure prosperity, each centre was ranked against each economic, social, environmental metric listed below. More information on assessment methodology is provided on page 36.

Prosperity Assessment: Summary of Key Metrics Used for

Analysis	Economic	Social	Environmental
	Town centre vacancy	Deprivation	
	Employment change (total)	Proportion of working age residents	Air pollution
	Office vacancy	% with no qualifications	Living Environment Deprivation
	Knowledge economy employment	Housing deprivation	
		Health	

Chapter contents:

Sub-Section	Overview
3.1 Economic Prosperity	Analysis of the amount of employment within urban centres to assess trajectory, the type and productivity of jobs locally, and the performance of town centres and commercial property markets
3.2 Social Prosperity	Analysis of how concentrated deprivation is within urban centres and the factors affecting the prosperity of the residents of urban centres
3.3 Environmental prosperity	Understanding the quality of the local living environment
3.4 Conclusions:: Ranking the prosperity of Coast to Capital's urban centres	By applying a composite ranking for each prosperity metric, the assessment has identified which urban centres have the greatest need for intervention.



Chapter 3: Assessing the Prosperity of Coast to Capital's Urban Centres

3.1. Economic Prosperity

Recent Change in Employment Levels

The majority of Coast to Capital's urban centres grew in terms of employment between 2012 and 2017. However, there are notable exceptions in centres such as Chichester (-12%) and Leatherhead (-8%). Consultation with council officers suggested that this can, in part, be explained by centres losing key anchor employers, such as national retail multiples and corporate headquarters.

Brighton and Hove had the largest growth in absolute terms (+11,782) and Chichester had the largest decline (-3,561).

Employment change per urban centre (2012-2017)

Urban Centre	Employment change, % (2012-2017)	Employment change, absolute (2012-17)
Lancing	18%	1,353
Newhaven	18%	863
Purley	17%	1,227
Coulsdon	14%	702
Horley	11%	705
Crawley	10%	6,065
Shoreham by Sea	10%	1,003
Dorking	10%	912
Brighton and Hove	9%	11,782
Reigate and Redhill	8%	2,309
Seaford	8%	367
Lewes	8%	872
Burgess Hill	7%	998
Bognor Regis	7%	1,222
Worthing	6%	2,806
Littlehampton	6%	993
Horsham	5%	1,189
Peacehaven	5%	131
Warlingham	3%	75
Croydon	3%	1,274
Caterham	2%	110
Epsom and Ewell	-1%	-204
Selsey	-2%	-70
East Grinstead	-5%	-602
Oxted	-7%	-325
Leatherhead	-8%	-2,281
Haywards Heath	-12%	-1,841
Chichester	-12%	-3,561
Banstead	-21%	-2,746
Coast to Capital Urban Centres Average	4%	
England	10%	



Chapter 3: Assessing the Prosperity of Coast to Capital's Urban Centres

3.1. Economic Prosperity

High value employment

In addition to assessing the quantum of jobs, it is important to assess the quality of employment. Whilst Coast to Capital's largest urban centres contain the highest amount of knowledge economy jobs, there are high proportions of knowledge employment in centres such as Leatherhead (37%) and Reigate and Redhill (33%). Whilst not the largest 'primary productivity drivers' these centres are vital for the overall prosperity and productivity of the area.

Knowledge economy jobs by urban centre (2017)

Urban Centre	Total KE jobs (2017)	% of all jobs
England	5,349,000	20%
Coast to Capital Urban Centres Average	128,960	21%
Brighton and Hove	32,630	23%
Croydon	13,300	29%
Crawley	11,915	17%
Reigate and Redhill	10,380	33%
Leatherhead	9,605	37%
Epsom and Ewell	6,420	21%
Worthing	5,690	12%
Horsham	5,305	23%
Burgess Hill	4,400	29%
Chichester	4,020	15%
Haywards Heath	3,055	22%
Dorking	2,600	25%
Lancing	2,070	23%
East Grinstead	2,070	19%
Bognor Regis	1,740	9%
Banstead	1,700	16%
Purley	1,590	19%
Shoreham by Sea	1,510	13%
Lewes	1,395	11%
Littlehampton	1,345	8%
Coulsdon	1,230	21%
Caterham	1,010	14%
Horley	1,000	14%
Oxted	805	19%
Seaford	535	11%
Selsey	525	15%
Newhaven	525	9%
Peacehaven	345	12%
Warlingham	245	10%



Chapter 3: Assessing the Prosperity of Coast to Capital's Urban Centres

3.1. Economic Prosperity

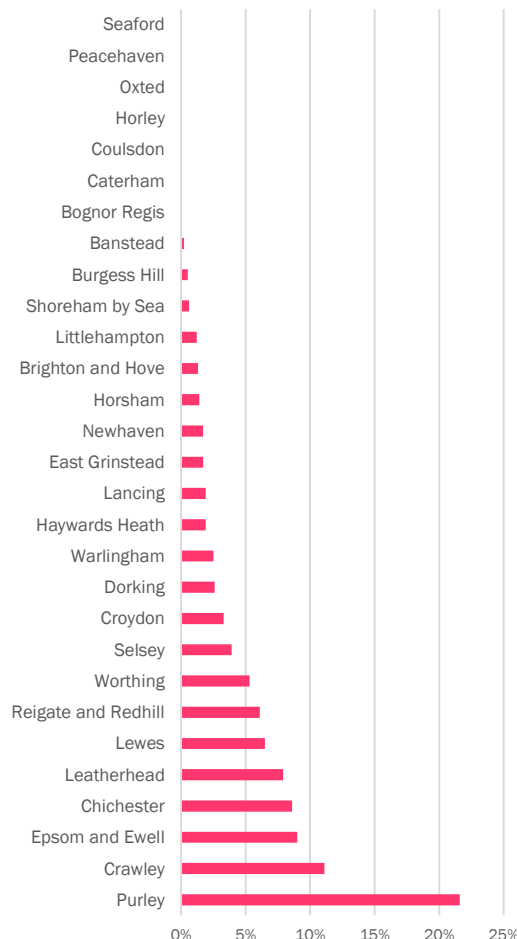
Town Centre and Commercial Vitality

Whilst the retail, cultural and civic function of urban centres dictates their economic role and performance, high street vitality is coming under increasing pressure. Over the past five years, vacancy has increased in 19 centres, mirroring challenges faced by high streets across the country.

Assessment of the region's office market shows a mixed picture with competing challenges. In 2018, 21 centres had a, office vacancy of 4% - below the ideal churn rate for the healthy functioning of the market. This could be limiting the opportunities for new businesses within these centres.

Conversely, there are also a number of centres with high vacancy, such as Purley (22%) which could indicate a oversupply of unsuitable commercial property.

Office vacancy (2018)



Town centre vacancy: % of vacant retail units (2014-2019)

Urban Centre	2014	2019	% Point Change
Ewell	7.9	17.1	9.2
Steyning	4.4	11.8	7.4
Lewes	9.0	15.9	6.9
Croydon	16.6	21.4	4.8
Billingshurst	7.7	11.8	4.1
Petworth	7.3	10.8	3.5
Littlehampton	8.2	11.1	2.9
Shoreham-by-Sea	6.4	8.6	2.2
Lancing	7.4	9.0	1.6
Reigate	3.7	5.3	1.6
Epsom	7.8	9.2	1.4
Horsham	8.1	9.5	1.4
Oxted	2.6	3.9	1.3
Worthing	10.1	11.4	1.3
Dorking	8.6	9.7	1.1
Peacehaven	9.5	10.6	1.1
Banstead	6.0	7.1	1.1
Newhaven	18.6	19	0.4
Arundel	5.9	6.2	0.3
Chichester	7.4	7.3	-0.1
Caterham	9.4	9.3	-0.1
Great Britain	11.9	11.7	-0.2
Leatherhead	8.3	8	-0.3
Coulsdon	9.7	9.4	-0.3
Redhill	13.2	12.7	-0.5
South East	11.1	10.2	-0.9
Brighton and Hove	7.7	6.7	-1.0
Burgess Hill	12.4	11	-1.4
Seaford	6.8	5.1	-1.7
Purley	13.7	11.6	-2.1
East Grinstead	8.0	4.7	-3.3
Crawley	13.6	10.3	-3.3
Haywards Heath	8.8	4.3	-4.5
Bognor Regis	12.9	7.7	-5.2
Horley	13.2	7.9	-5.3

Note: the final prosperity assessment has taken an average of the vacancy for Epsom and Ewell and Reigate and Redhill for consistency with the rest of the assessment



Chapter 3: Assessing the Prosperity of Coast to Capital's Urban Centres

3.2. Social Prosperity

Social Participation

Social deprivation is more concentrated within many of the region's coastal communities such as Selsey and Lancing. These areas are defined by a higher proportion of residents with no qualification, poor health outcomes and a lower proportion of residents at working age.

These demographic restrictions on the local labour market are potentially limiting the productivity of these areas and attractiveness to inward investment.

Proportion of residents between the ages of 16-64

Urban Centre	% Working Age residents
Brighton and Hove	70.9%
Croydon	68.9%
Crawley	64.7%
Purley	63.3%
England	63%
Coast to Capital Urban Centres	62.8%
Reigate and Redhill	62.7%
Horley	62.7%
Caterham	62.4%
Chichester	62.3%
Horsham	62.2%
Lewes	62.0%
Burgess Hill	61.9%
Warlingham	61.7%
Dorking	61.6%
Epsom and Ewell	61.5%
Newhaven	61.3%
East Grinstead	61.3%
Haywards Heath	61.0%
Coulsdon	60.9%
Worthing	60.0%
Banstead	59.2%
Shoreham by Sea	59.1%
Peacehaven	58.5%
Leatherhead	57.9%
Oxted	57.4%
Lancing	57.4%
Bognor Regis	56.4%
Littlehampton	53.6%
Seaford	52.1%
Selsey	50.6%

Proportion of residents with no qualifications

Urban Centre	% with no qualifications
Selsey	32%
Lancing	30%
Peacehaven	28%
Bognor Regis	26%
Newhaven	26%
Littlehampton	25%
Shoreham by Sea	23%
Seaford	23%
England	23%
Worthing	21%
Crawley	20%
Coast to Capital Urban Centres	19%
Banstead	19%
Horley	18%
Warlingham	17%
Burgess Hill	17%
Coulsdon	17%
Chichester	17%
Caterham	17%
Lewes	16%
Horsham	16%
Dorking	16%
Brighton and Hove	16%
Epsom and Ewell	16%
East Grinstead	16%
Leatherhead	15%
Oxted	15%
Reigate and Redhill	14%
Croydon	14%
Haywards Heath	13%
Purley	13%

Proportion of residents reporting that they were in 'good' health

Urban Centre	% reporting 'good' health
Selsey	37%
Littlehampton	37%
Seaford	37%
Lancing	37%
Newhaven	37%
Warlingham	37%
Bognor Regis	37%
Worthing	36%
East Grinstead	36%
Horley	36%
Crawley	36%
Chichester	36%
Shoreham by Sea	36%
Peacehaven	35%
Croydon	35%
Coulsdon	35%
Horsham	35%
Banstead	35%
Coast to Capital Urban Centres	35%
Burgess Hill	35%
Purley	34%
Caterham	34%
Lewes	34%
England	34%
Leatherhead	34%
Epsom and Ewell	34%
Brighton and Hove	34%
Haywards Heath	33%
Dorking	33%



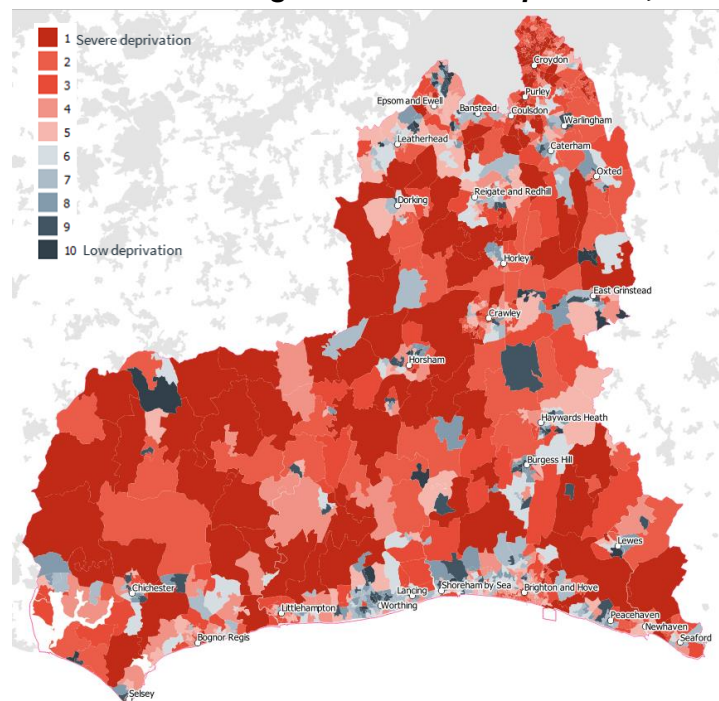
3.2. Social Prosperity

Relative Multiple Deprivation

On the whole, deprivation across the Coast to Capital area is low. Despite this, the overall figure masks entrenched pockets of deprivation within urban centres (especially larger centres). Deprivation is measured at the smallest statistical geography recorded by the Office for National Statistics. This is called a Lower Super Output Area (LSOA), and these LSOAs have been used to define statistical geographies for all 29 urban centres.

Housing deprivation is the region's biggest challenge. The barriers to housing and services IMD domain is comprised of several sub-domain metrics including housing affordability. This issue is particularly acute in Croydon, where the entire urban centre falls within the most deprived 30% nationally.

Barriers to Housing and Services Deprivation, 2019



Rank of overall and housing & services deprivation, 2019

Urban Centre	Housing deprivation: % of LSOAs in the top 30% most deprived for the housing sub-domain	Overall deprivation: % of LSOAs in the top 50% most deprived
Croydon	100%	82%
Purley	93%	27%
Crawley	48%	58%
Coulsdon	46%	23%
Seaford	40%	20%
Newhaven	38%	88%
Peacehaven	36%	55%
Horley	36%	29%
Littlehampton	31%	39%
Banstead	29%	13%
Lewes	27%	9%
Bognor Regis	27%	41%
Coast to Capital Urban Centres Average	26%	32%
Brighton and Hove	25%	44%
Haywards Heath	20%	5%
Horsham	19%	6%
Chichester	19%	38%
Caterham	18%	0%
Oxted	17%	0%
Epsom and Ewell	16%	7%
East Grinstead	15%	15%
Reigate and Redhill	14%	11%
Lancing	13%	44%
Burgess Hill	11%	5%
Dorking	10%	10%
Leatherhead	7%	3%
Worthing	6%	42%
Shoreham by Sea	5%	43%
Selsey	0%	50%
Warlingham	0%	0%

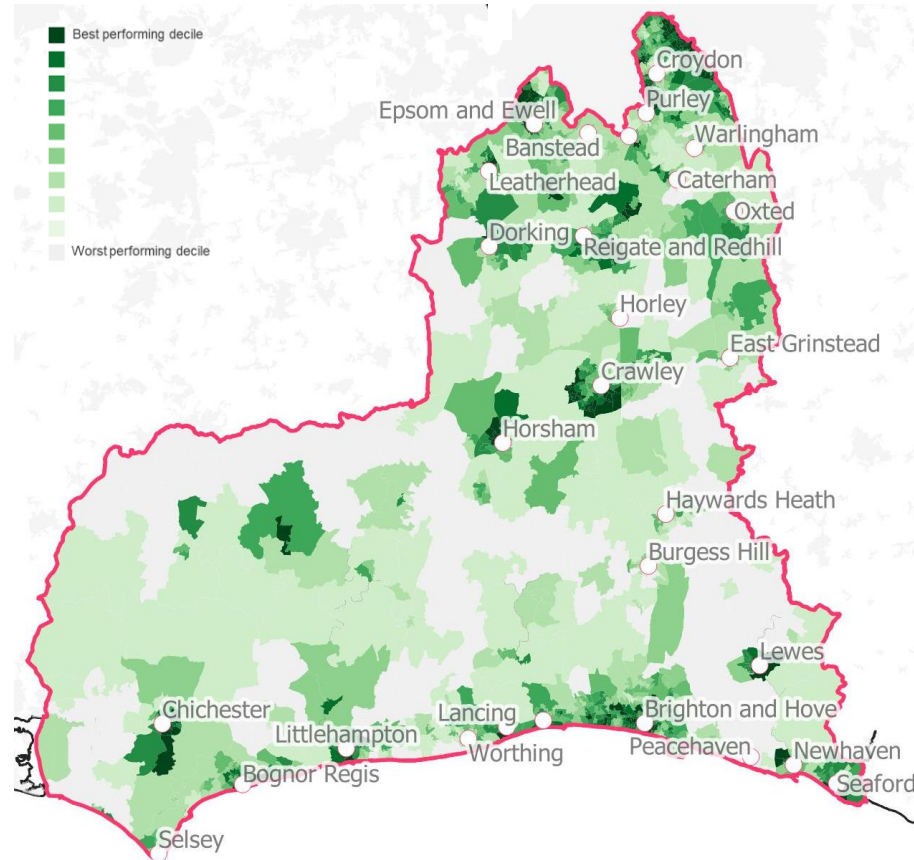


3.3. Environmental Prosperity

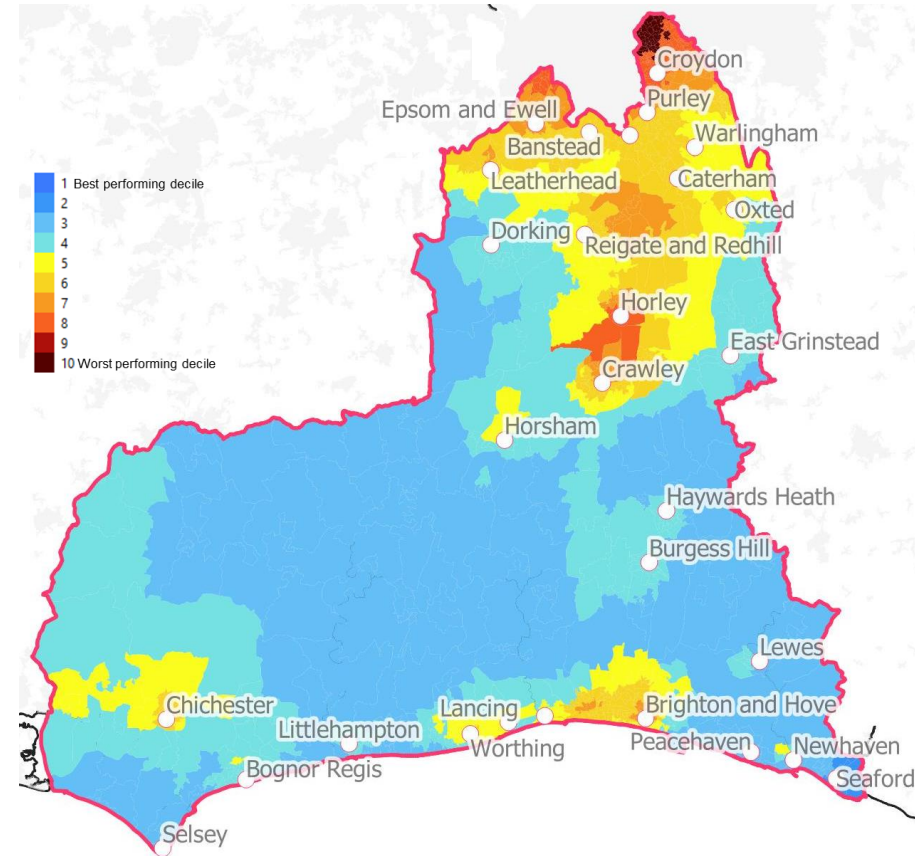
Quality of Environment

Using data from the Consumer Data Research Centre (CDRC) and the Access to Health Assets and Hazards Index, air pollution and access to green and blue space has been mapped overleaf to the spatial distribution of Coast to Capital's environmental prosperity. Whilst overall air quality within the LEP area is good, levels of air pollution are higher within urban centres and towards the north of the region.

Access to blue/green space



Local air pollution data (2019)



Note: blue areas have the lowest areas of air pollution and the red areas have the highest levels



3.3. Environmental Prosperity

Air Quality and Living Environment

The Coast to Capital region is characterised by its high quality living environment and abundance of green space. Despite this, many of the urban centres rank poorly for air quality by national standards. Air pollution is highest in the north of the region, with Croydon, Horley and Epsom and Ewell in the 20% worst performing areas in the country. Conversely, many coastal areas (such as Seaford and Peacehaven) have low levels of air pollution.

The assessment has also looked at the living environment sub domain of the Indices of Multiple Deprivation. This contains a number of indicators to assess the quality of the built (such as quality of housing) and natural (such as air quality) environment. Generally, Coast to Capital's larger urban centres (such as Croydon, Worthing and Brighton perform least well by this measure).

Rank of urban centres by average air quality performance

Urban Centre	Air Pollution, 2019 average rank of urban centre LSOA deciles (1= best performing, 10 = worst)
Croydon	8.8
Horley	8.4
Epsom and Ewell	8.2
Purley	7.3
Caterham	7.0
Coulsdon	7.0
Reigate and Redhill	7.0
Crawley	7.0
Banstead	7.0
Chichester	6.8
Leatherhead	6.6
Brighton and Hove	6.6
Warlingham	6.4
Shoreham by Sea	6.4
Coast to Capital Urban Centres Average	6.2
Oxted	5.8
Lancing	5.8
Worthing	5.6
Horsham	5.5
Burgess Hill	5.0
Dorking	5.0
East Grinstead	5.0
Bognor Regis	4.9
Haywards Heath	4.9
Lewes	4.7
Newhaven	4.6
Littlehampton	4.6
Peacehaven	4.0
Selsey	4.0
Seaford	3.3

Rank of living environment deprivation, 2019

Urban Centre	Proportion of LSOAs in the top 30% most deprived for Living Environment
Croydon	71%
Worthing	42%
Brighton and Hove	36%
Coast to Capital Urban Centres Average	15%
Littlehampton	14%
Lancing	13%
Newhaven	13%
Dorking	10%
Shoreham by Sea	10%
Coulsdon	8%
East Grinstead	8%
Chichester	6%
Bognor Regis	5%
Crawley	5%
Reigate and Redhill	4%
Banstead	0%
Burgess Hill	0%
Caterham	0%
Epsom and Ewell	0%
Haywards Heath	0%
Horley	0%
Horsham	0%
Leatherhead	0%
Lewes	0%
Oxted	0%
Peacehaven	0%
Purley	0%
Seaford	0%
Selsey	0%



Chapter 3: Assessing the Prosperity of Coast to Capital's Urban Centres

3.4 Conclusions: Comparing the 'Prosperity' of the Urban Centres

The analysis on the preceding slides has been used to produce a 'composite' assessment of the relative prosperity of Coast to Capital's Urban Centres.

The findings of the assessment are summarised in the map and chart overleaf, with the urban centres split into three broad categories: more prosperous, moderate prosperity and least prosperous.

Overall, the data points to a north-south prosperity divide, with many of East Surrey's centres falling within the lowest 'need' categorisation. Many of the region's coastal communities such as Littlehampton are considered the least prosperous with significant social and economic challenges. Environmental prosperity is lower in the north of the LEP area which is driven by poor air quality.

There are a number of outliers that challenge these broad groupings and local understanding of the prosperity of these centres. These are:

- **Croydon** – whilst the centre has grown significantly in recent years, social and environmental deprivation is highly concentrated within the urban centre
- **Chichester** – although generally viewed as relatively prosperous, the city is showing signs of early-stage decline
- **Coulsdon and Purley** – whilst these areas are viewed as affluent suburban centres, housing affordability is the principle factor hindering local prosperity
- **Horley** – despite being viewed as relatively deprived by Reigate and Banstead Council, Horley's recent economic performance means that it performs strongly compared to other centres
- **Worthing** – although Worthing viewed by the Borough Council as more prosperous than adjacent centres such as Lancing, the centre performs poorly in terms of social and economic metrics. However, this could change and demographics continue to shift as 'coastal drift' out of centres such as Brighton occurs and should be monitored closely.

Technical Assessment Methodology

Prosperity was assessed using the economic, social and environmental metrics recorded within this chapter. Each urban centre was ranked against each metric and performance compared against the other 29 centres (with the centre ranking 1st being the most prosperous and the centre ranking 29th the least prosperous).

For some metrics, prosperity was indicated by being top of the list of urban centres (e.g. the centre with the highest number of knowledge economy jobs receiving a score of 1), whereas for other metrics, greatest prosperity was indicated by being at the bottom of the list (e.g. the centre with the lowest deprivation receiving a score of 1).

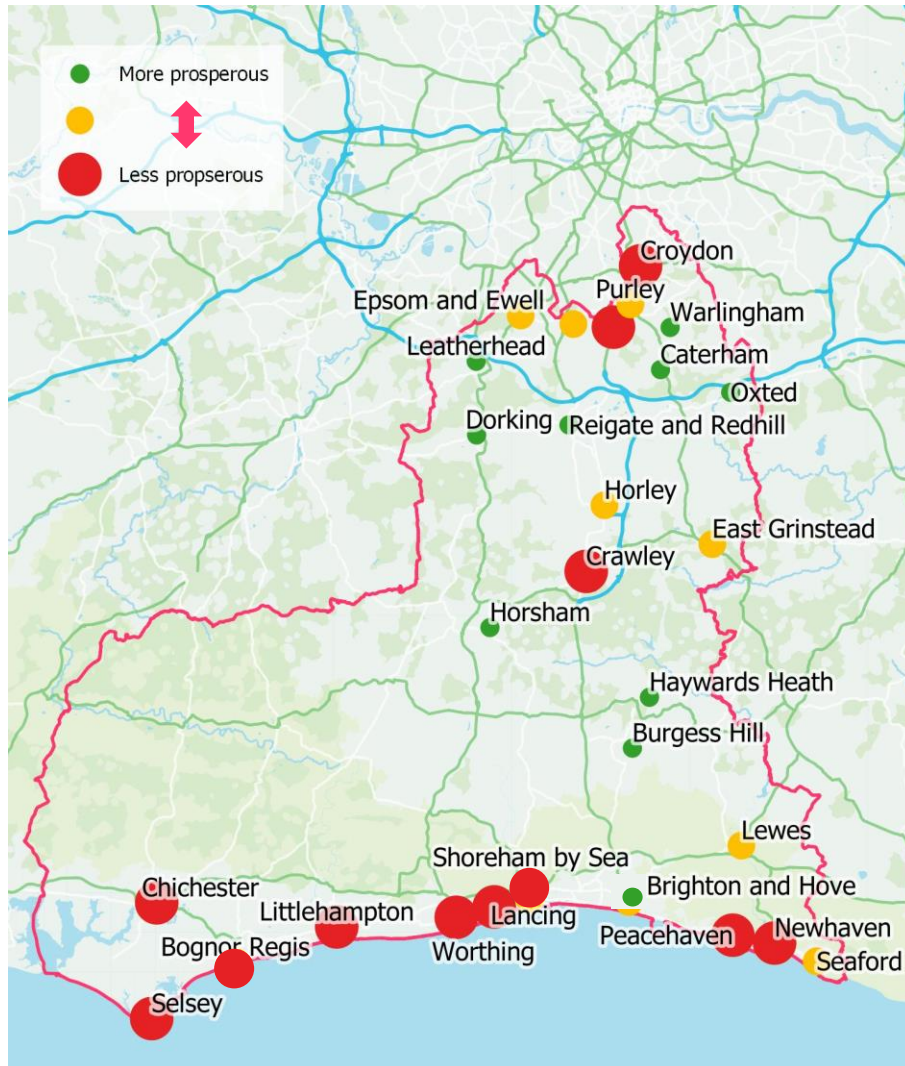
Overall need was then quantified by adding together the ranking of each centre for each metric to give a composite prosperity scoring.



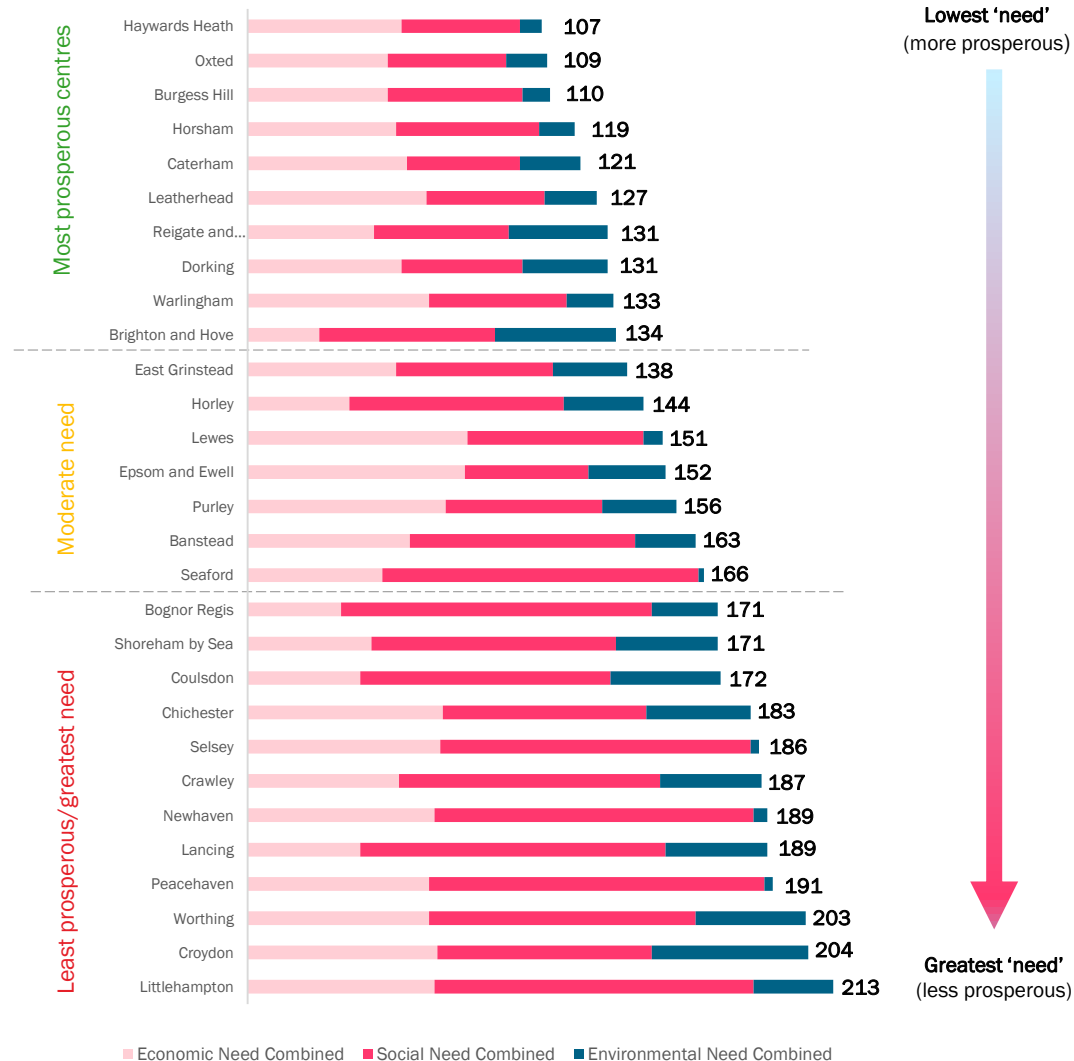
Chapter 3: Assessing the Prosperity of Coast to Capital's Urban Centres

3.4 Conclusions: Comparing the 'Prosperity' of the Urban Centres (continued)

Mapping of Urban Centre Prosperity

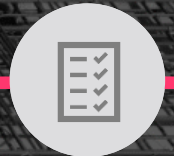
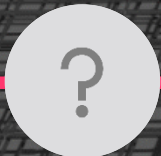


Composite score of prosperity assessment metrics





Chapter 4. Assessing the Opportunity in Urban Centres





Chapter 4: Assessing the Opportunity in Urban Centres

4.0 Introduction

Chapter contents:	
Sub-Section	Overview
4.1 Summary of local aspiration	Mapping of key developments within urban centres
4.2 Residential pipeline	Analysis of where the most housing and commercial growth will be absorbed within existing urban centres
4.3 Viability and deliverability	Assessment of local authority delivery track record and commercial values as key metrics to assess viability
4.4. Qualitative assessment of aspiration	To reflect the diversity of urban centres and local opportunity a range of qualitative metrics have been used to measure prosperity
4.5 Ranking the opportunity in Coast to Capital's urban centres	By applying a composite ranking for each opportunity metric, the assessment has identified which urban centres have the greatest opportunity.





This chapter explores the significant opportunities which exist across the network of urban centres. These range from opportunities which are ‘transformational’ and regionally significant, to opportunities which have a more local scale and importance, but taken together which will play an integral role in shaping the region’s future prosperity.

In addition to quantitative desk-based research, individual opportunity assessments were held with each constituent local authority and the two county councils. This was used to understand local ambitions, headroom for future growth and barriers to delivery.

The assessment brings together a mix of qualitative and quantitative metrics to reflect the diversity of centres whilst ensuring robustness.

The opportunity assessment has been structured using business case language to communicate future opportunities to government. To reflect the priorities of government, increased weighting given to quantitative metrics (economic case). More detail on the methodology used to assess prosperity is provided on page 44.

Opportunity Assessment: Summary of Key Metrics Used in the

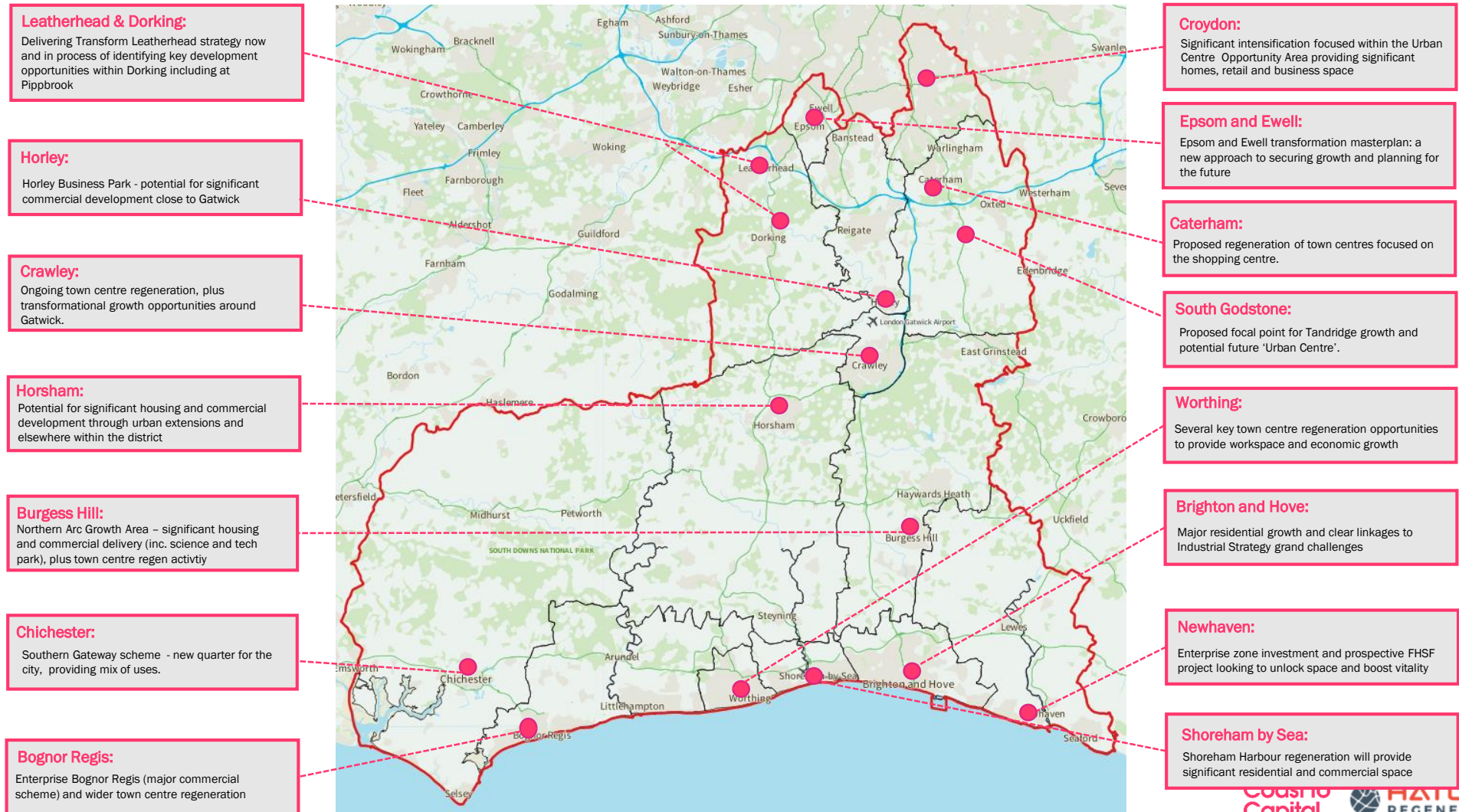
Analysis	Case	Metrics
	Strategic - this assesses the strength and relevance of vision to understand how plans for growth align with national, regional and local objectives	<ul style="list-style-type: none"> • Relevance of plans to the industrial strategy • Local Plan status • Strength of local vision
	Economic – assessing scale of commercial and housing growth planned in the urban centre	<ul style="list-style-type: none"> • Homes planned • Commercial space planned • Space for growth • Longer term intent
	Commercial and Financial – assessing market interest, viability and deliverability	<ul style="list-style-type: none"> • Housing delivery • Office and industrial values • Significance of infrastructure gap
	Management – assessing wider considerations affecting the delivery of proposal including pollical mandate and track record of delivering investment	<ul style="list-style-type: none"> • Mandate • Experience of LEP investment delivery



4.1 Understanding Local Aspiration and Opportunity

This map below draws on consultation with Coast to Capital local authorities and provides a snapshot of the key urban centre opportunities across the region. This has formed the starting point for the comparative assessment of local opportunity. More detail on the opportunities and constraints within each centre can be found in the Gazetteer in the Appendix.

Snapshot of Local Aspiration and Opportunity



Chapter 4: Assessing the Opportunity in Urban Centres

4.2 Residential Pipeline

Planning documents from all local authorities have been reviewed to understand the quantum of growth. The majority of the housing growth is to be accommodated within Coast to Capital's largest centres.

It should be noted that this list is not exhaustive, but rather is intended to provide a snapshot of local ambition and capacity for growth. Whilst there is no formal site allocation for commercial space recorded in a number of urban centres, it is likely that there will be commercial developments coming forward in these centres.

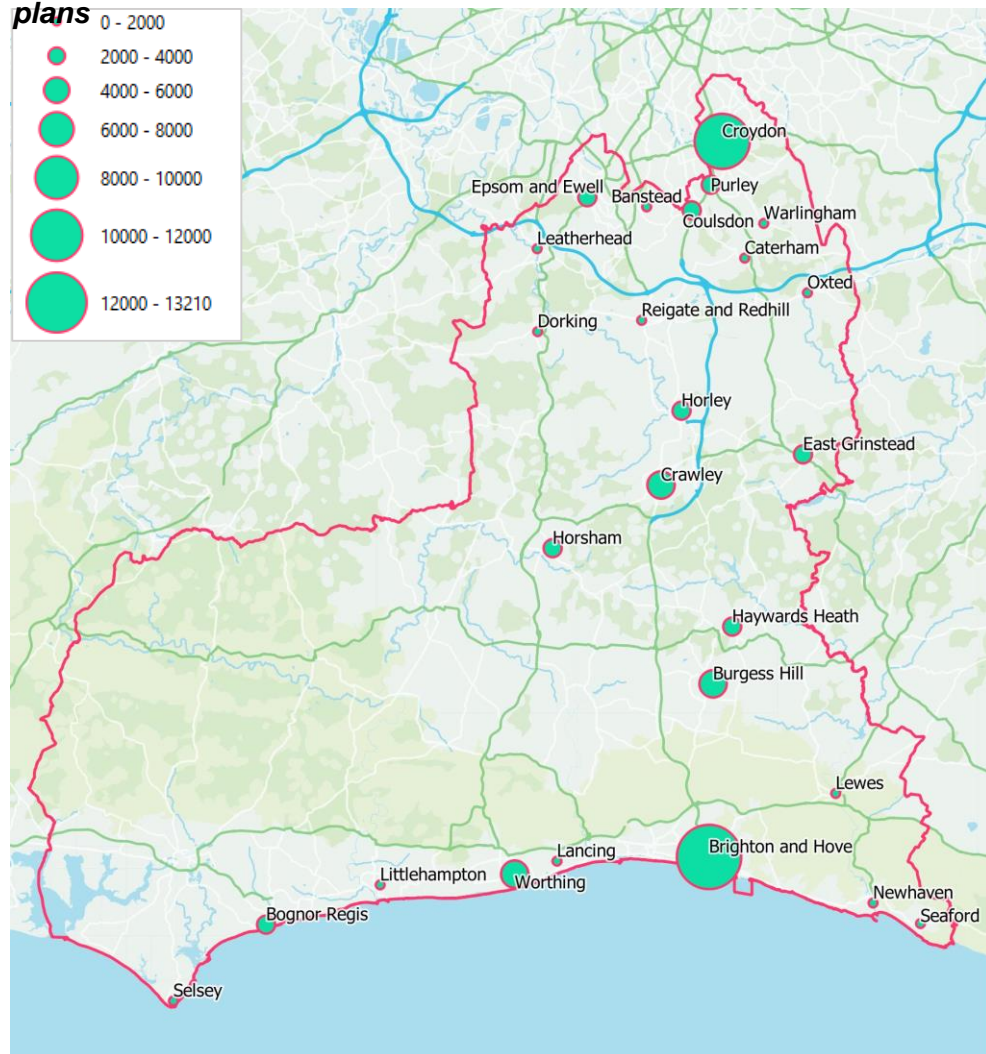
This assessment is also not inclusive of major pipeline developments such as the plans for a new Garden village in South Godstone which could deliver up to 5,000 new homes and Epsom and Ewell's ambition to deliver thousands of homes through its forthcoming Transformation Masterplan.

Proposed commercial scale of growth from local plans

Urban Centre	Urban Centre Commercial Space Identified within Planning Documents (m2)
Brighton and Hove	86,800
Croydon	92,000
Coulsdon	777
Purley	777
Crawley	57,500
Reigate and Redhill	20,000
Banstead	2,000
Horley	24,000
Burgess Hill	151,275
East Grinstead	0
Haywards Heath	0
Chichester	179,000
Selsey	None identified
Worthing	55,869
Horsham	46,450
Leatherhead	None identified
Dorking	None identified
Bognor Regis	170,000
Littlehampton	8,750
Lewes	5,000
Seaford	None identified
Peacehaven	None identified
Newhaven	55,000
Epsom and Ewell	5,000
Oxted	700
Warlingham	None identified
Caterham	1,100
Lancing	10,000
Shoreham by Sea	31,000

Note: where site allocations have been provided in hectares, ODPM ELR guidance has been applied to convert into sqm assumed at 0.4 of site allocation

Proposed scale of housing growth from local plans



Chapter 4: Assessing the Opportunity in Urban Centres

4.3 Viability and Deliverability Considerations

A key consideration when assessing local growth potential is the viability of development. Analysis of average commercial and office values suggests that the viability of commercial development varies significantly. Low land values and commercial rents mean in places such as Bognor Regis (£6.10 per square foot) the viability of commercial development represents a significant barrier to growth.

To understand the delivery track record of local authorities, the research has analysed performance against the Ministry of Housing Communities and Local Government’s ‘Housing Delivery Test’. This compares the net homes delivered over three years to the homes that should have built over the same period (their housing requirement).

A number of Coast to Capital’s local authorities are currently in the process of developing their local plan. Until plans have gone through consultation and examination, there is potential that plans for growth could be revised.

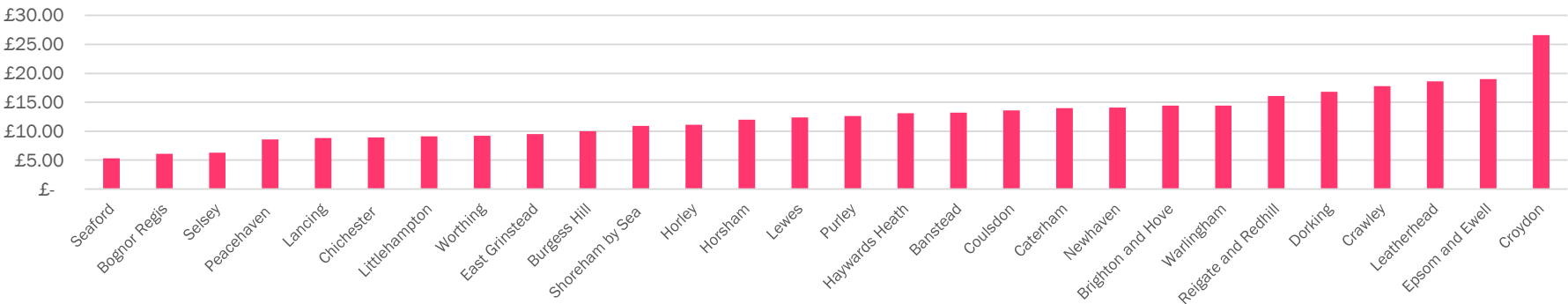
Review of local plan status

Local Authority	Local Plan Status
Brighton and Hove	Adopted: 2016-2030
Croydon	Adopted: 2016-2036
Crawley	Adopted: 2015-2030
Reigate and Banstead	Adopted but older: 2012-2027
Mid Sussex	Adopted: 2014-2031
Chichester	Adopted but under review: 2016-37
Worthing	Adopted: 2016-33
Horsham	New plan in development
Mole Valley	New plan in development
Arun	Adopted: 2011-31
Lewes	Adopted: 2010-2030
Epsom and Ewell	New plan in development
Tandridge	New plan in development
Adur	Adopted: 2010-32

MHCLG Housing Delivery Test Scores per Local Authority

Local Authority	MHCLG Housing Delivery Test
Brighton and Hove	77%
Croydon	151%
Crawley	181%
Reigate and Banstead	119%
Mid Sussex	110%
Chichester	126%
Worthing	93%
Horsham	141%
Mole Valley	77%
Arun	91%
Lewes	50%
Epsom and Ewell	57%
Tandridge	65%
Adur	41%

Average rents for industrial and office space (2018)



+ Source: MHCLG Housing Delivery Test (2018), Co-Star (2018)



Chapter 4: Assessing the Opportunity in Urban Centres

4.4 Understanding Opportunity – Broader Qualitative Assessment

In addition to those quantitative metrics on the previous pages, to reflect the variety of local opportunity, a number of qualitative metrics have also been used.

Whilst given less weighting in the scoring framework compared to quantifiable measures, these metrics have been designed to capture the broader pipeline of opportunities and local vision for the evolution of places.

In addition to scale of opportunity, this has sought to better understand the deliverability of proposals and relevant barriers to delivery. An example of how these metrics have been applied can be visualised in the table (right).

Summary of Broader Qualitative Assessment on Opportunity

Case	Qualitative Metrics	Urban Centre Example
Strategic: strength and relevance of vision Weighting = 1	<ul style="list-style-type: none"> Relevance of plans towards the Industrial Strategy 	<ul style="list-style-type: none"> Epsom and Ewell's transformation masterplan. Increased densification through enhanced sustainable transport has clear links to the Industrial strategy's clean growth and future of mobility agenda)
	<ul style="list-style-type: none"> Strength of local vision (wider strategic documents outlining ambitions) 	<ul style="list-style-type: none"> Croydon Opportunity Area Planning Framework has been established to guide development within the urban centre
Economic: scale of growth Weighting = 2	<ul style="list-style-type: none"> Longer term intent (not in local plans but represents significant strategic opportunities for the sub-region) 	<ul style="list-style-type: none"> Horsham urban extension proposals. A number of major development sites in and around the existing urban centre which could deliver significant housing for the region
Commercial and financial: market interest, viability and deliverability Weighting = 1	<ul style="list-style-type: none"> Significance of infrastructure gap to deliver plans 	<ul style="list-style-type: none"> Burgess Hill Science and Technology Park – Mid Sussex District Council's Local Plan has allocated land for a science and technology park to the North-west of Burgess Hill. Without junction enhancements, the size of the scheme will be limited and would not deliver the full site capacity of 100,000m² of employment floorspace and 2,500 new jobs.
Management: mandate and track record Weighting = 1	<ul style="list-style-type: none"> Political mandate for growth plans 	<ul style="list-style-type: none"> Bognor Regis – new political administration has cast doubt on several town centre regeneration proposals.
	<ul style="list-style-type: none"> Experience of delivering LEP investment 	<ul style="list-style-type: none"> Urban centres have been the primary focus of LEP funding through the Local Growth Fund. This includes major regeneration strategy funding for schemes such as the delivery of the Transform Leatherhead strategy



Chapter 4: Assessing the Opportunity in Urban Centres

4.5 Conclusions: Comparing the 'Prosperity' of the Urban Centres

The analysis on the preceding slides has been used to produce a 'composite' assessment of the relative prosperity of Coast to Capital's Urban Centres.

The findings of the assessment are summarised in the map and chart overleaf, with the urban centres divided into three broad categories based on their ranking: greater opportunity, moderate opportunity, less opportunity.

Opportunity and capacity for growth is greatest in Coast to Capital's 'primary productivity drivers'. This is underpinned by the scale of growth planned for these centres as well as the viability and deliverability of proposals within these centres.

Despite this, opportunity is not exclusive to these centres and a large number of the region's smaller centres will be vital for accommodating future growth in the region.

Many of the centres that received a low opportunity score are heavily constrained (such as Dorking and Leatherhead) which is limiting the capacity for growth. Equally, many lower opportunity centres are considered as 'residential centres' within the function assessment and are not the primary growth focus for their respective local authorities.

Technical Assessment Methodology

Metrics for each case were devised for each 'case' following discussions with constituent local authorities and were designed to cover baseline information requirements for future funding asks to government.

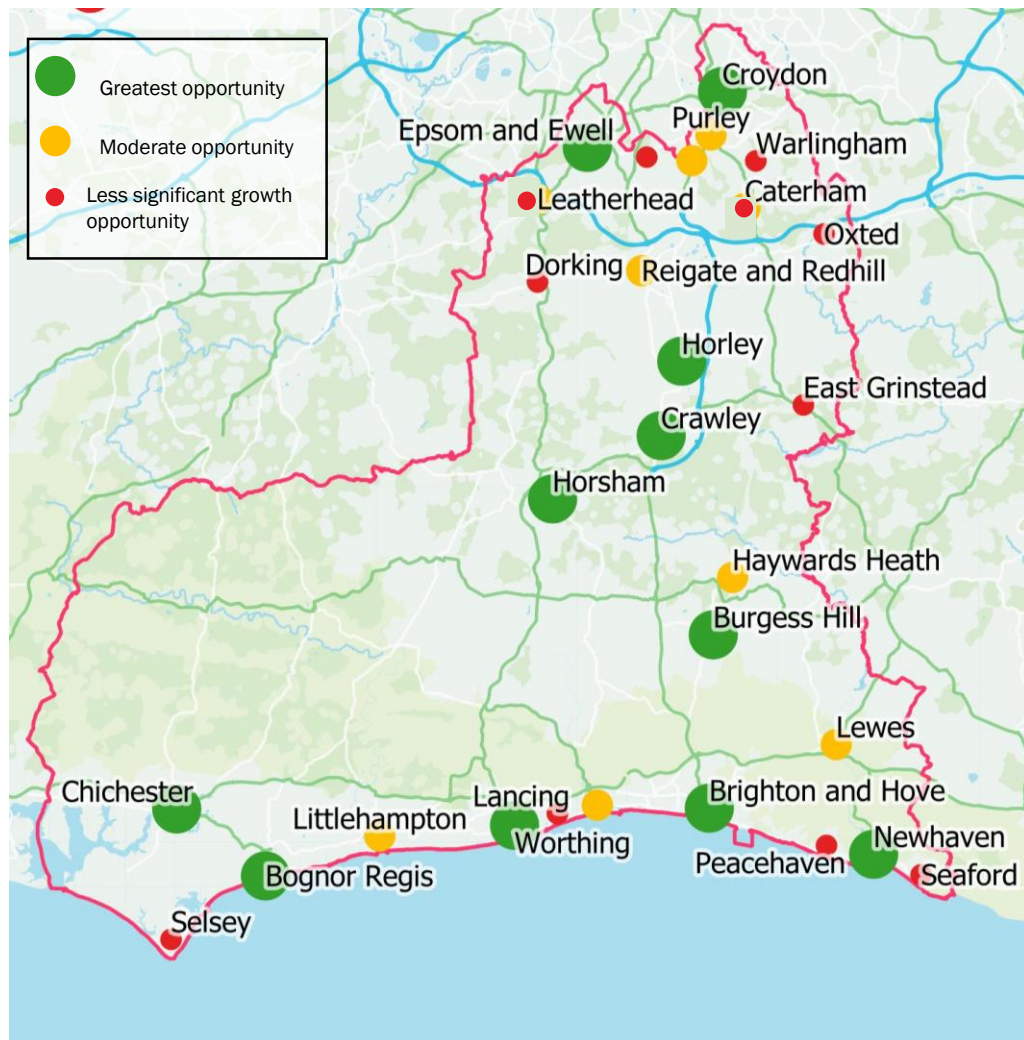
Each metric was given a scoring scale from either 0 – 2 (used for qualitative metrics which could be RAG rated based on evidence provided in local authority consultations) or 1 – 3 (used for quantitative metrics). Results for quantitative metrics were then banded to give a score of between 1 and 3. For example, for the commercial space planned metric, areas which had allocated less than 20,000sqm were given one point, those delivering between 20,000-39,999sqm were given 2 points and 40,000sqm+ were given 3 points.

To reflect the importance of the economic case for the future growth and productivity of the Coast to Capital area, these metrics were given a weighting of 2, meaning all scores for this case were doubled. Scores for each case were then combined to give a total opportunity score, with a higher score indicating greater opportunity.

Chapter 4: Assessing the Opportunity in Urban Centres

4.6 Conclusions: Comparing the Opportunity in Coast to Capital's Urban Centres

Mapping of Urban Centre Prosperity

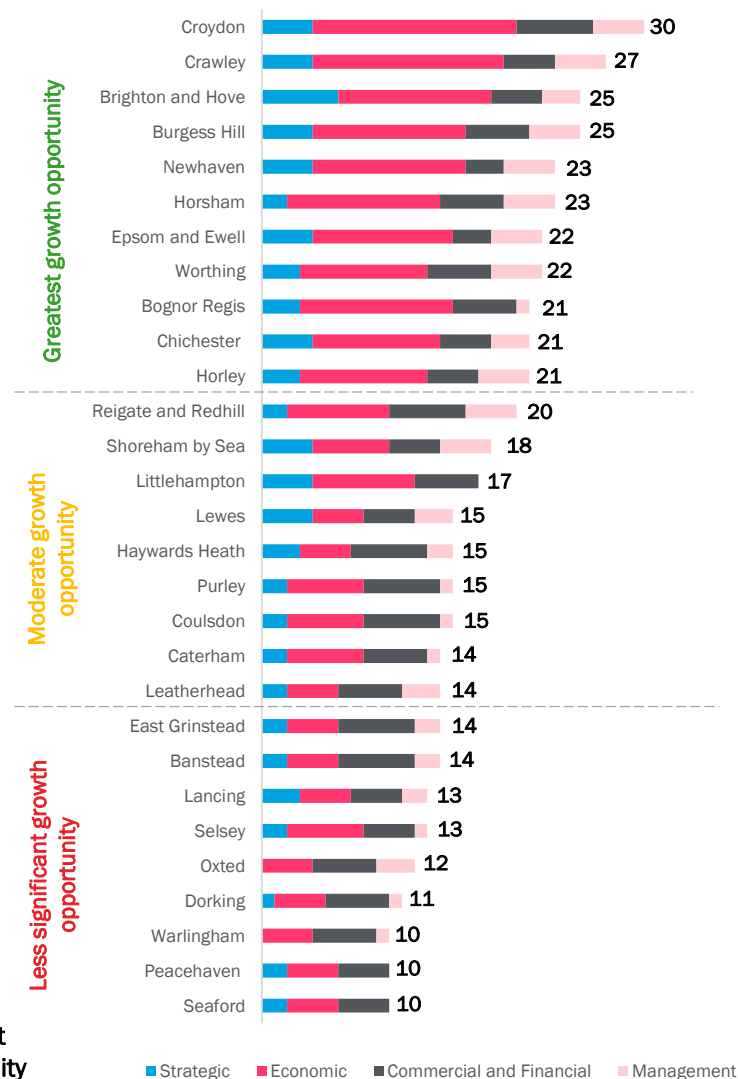


Greatest Opportunity

↑

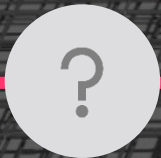
Less Significant Growth Opportunity

Composite score of opportunity assessment





Chapter 5. Enhancing Prosperity and Realising Opportunity Across the Urban Centres





Chapter 5: Enhancing Prosperity and Realising Opportunity Across the Urban Centres

5.0. Introduction

This chapter builds upon the findings of the previous chapters regarding the character, performance and opportunity of the Urban Centres, exploring the factors which are constraining potential and the types of support which are needed in response to this.

The previous chapters have highlighted both the importance of Coast to Capital's network of urban centres. As the focal point of the Coast to Capital economy, the Urban Centres (both individually and collectively) have an instrumental role to play in supporting both local economic aspiration, but also the economic aspiration of the region as a whole.

The future vitality of Coast to Capital's network of Urban Centres, and hence the region as a whole will be defined to some extent by the response to the barriers which are constraining prosperity and which have the potential to undermine the opportunity.

While the urban centres vary considerably in their size and function and in terms of the nature of their future aspiration, they share commonalities in terms of a consistent requirement for strategic and financial support to help respond to areas of embedded challenge, and to unlock new opportunities.

That said, the diverse nature of the Centres also necessitates a place specific approach, tailored to local economic social, strategic and political contexts.

Chapter 5 Contents:

Sub-Section	Overview
5.1. Comparing Relative Prosperity and Opportunity Across the Urban Centres	Summary assessment of the analysis from previous chapters, providing conclusions on relative need and opportunity.
5.2. Understanding Strategic Barriers to Delivery	Analysis of some the 'strategic' and cross cutting delivery barriers which are common across the Urban Centres
5.3. Mapping Local Barriers to Delivery	Mapping of some of the most important local level barriers which are constraining delivery
5.4. Understanding Strategic Support Needs	Summary of the strategic level support needs common across the Urban Centres.
5.5. Tailoring the Response to Local Need and Opportunity	Using the comparative assessment of prosperity and opportunity across the Urban Centres to define local support needs and focus.



5.1. Comparing 'Relative' Prosperity and Opportunity Across the Urban Centres

The research into function, need and opportunity, summarised in Chapters 2, 3 and 4, has been used to produce a *comparative* assessment of Coast to Capital's urban centres.

This assessment is presented in the chart to the right, and highlights:

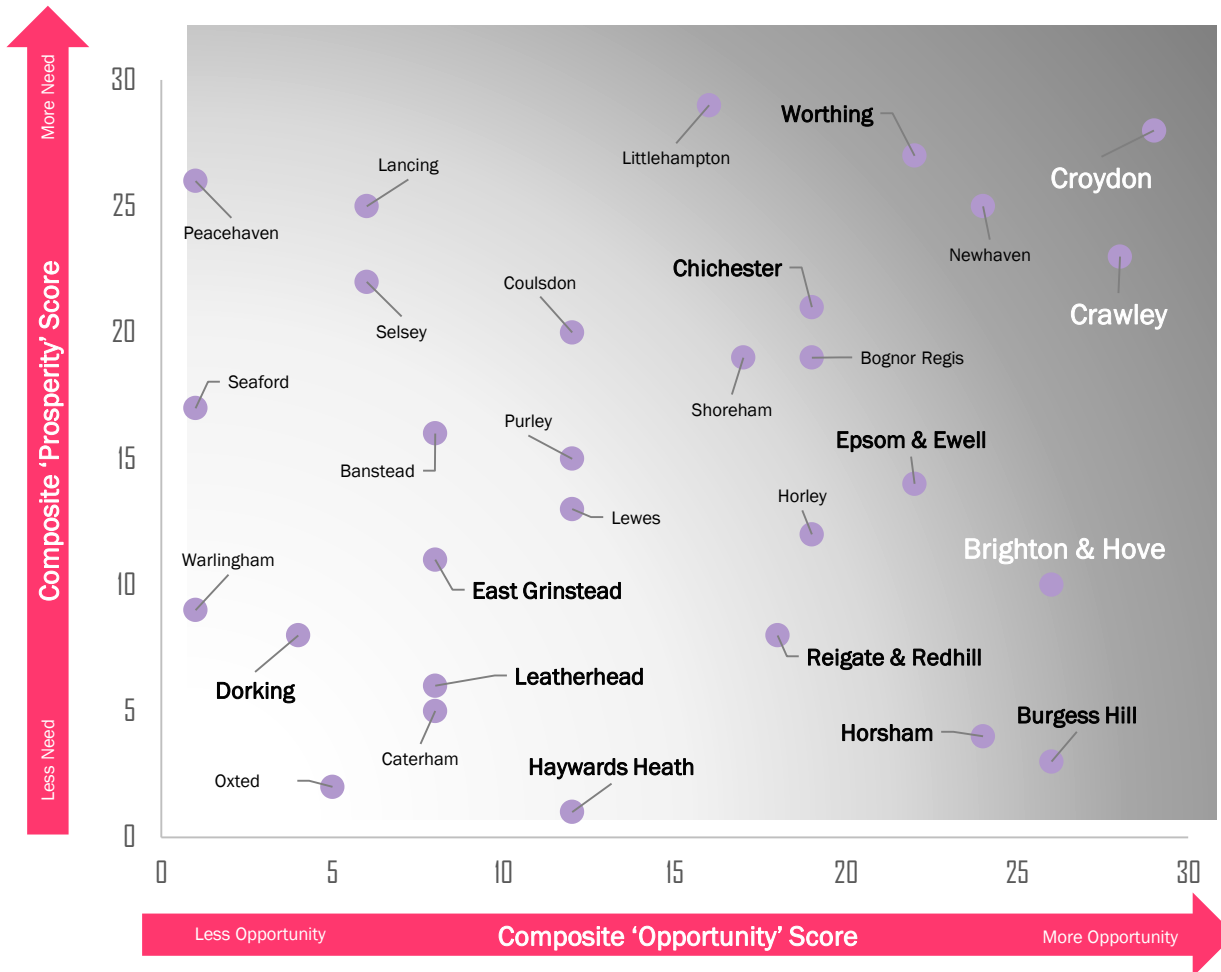
- + The **function** of the urban centres, denoted by the typeface of each place name
- + Comparative '**prosperity**' across the urban centres, denoted by the vertical axis
- + Comparative '**opportunity**' across the urban centres, denoted by the horizontal axis.

The analysis illustrates the different contexts of the urban centres, and helps to compare and differentiate between varying scales of need and opportunity at the local level.

It should be noted that the analysis is judgement on *relative* need and opportunity from one urban centre to the next, rather than a judgement on absolute need and opportunity in a broader sense. It should also be noted that the analysis marks a snapshot at a certain point in time, and that the context of different urban centres will inevitably evolve over time.

The comparative assessment provides a starting point in helping to consider future support needs of the Urban Centres, which forms the focus of the rest of this chapter.

Comparative Assessment of 'Prosperity' and 'Opportunity'



Key: Typeface of place names relates to current economic function (see Chapter 2) for full typology:

Primary productivity drivers

Sub-Regional hubs

Local service centres



5.2. Understanding Strategic Barriers to Delivery

While the Urban Centres are the focal point for Coast to Capital's economic headroom and opportunities, the research has highlighted both strategic and local constraints which have the potential to act as a barrier to growth. Understanding and responding to these will be key to realising local opportunity and aspiration.

Consultation with the local authorities has highlighted a number of overarching / strategic barriers which are common across the Urban Centres in constraining performance and growth. These include:

- 1. Geographic and spatial challenges:** one of Coast to Capital's greatest assets is the quality and diversity of its physical landscape. But for many urban areas, this also acts as a significant barrier / constraint to growth. Green Belt and National Park restrictions are a constraint across the area, with space for growth further constrained by the coastline for settlements in the coastal strip
- 2. Strategic transport challenges:** strategic transport challenges are cited as a fundamental factor impact on local prosperity, but also future growth – both in terms of movement between urban centres (the Brighton Mainline and major highways routes such as the A27), and local access to the towns (local bypasses, junctions, and access routes to new developments). While the advent of Transport for the South East marks a positive step forward in terms of strategic planning, there are significant barriers to overcome regarding the case for and prioritisation of investment
- 3. The supply of employment land across Coast to Capital:** across nearly all of the urban centres, employment land was cited as a key factor undermining local economic performance and potential. This reflects both the loss of existing space over recent years (particularly since permitted development rights

were enacted by government in 2013), a lack of strategic approach to planning for future space needs across sub-regions and market areas, and challenges in market confidence undermining the delivery of new commercial space.

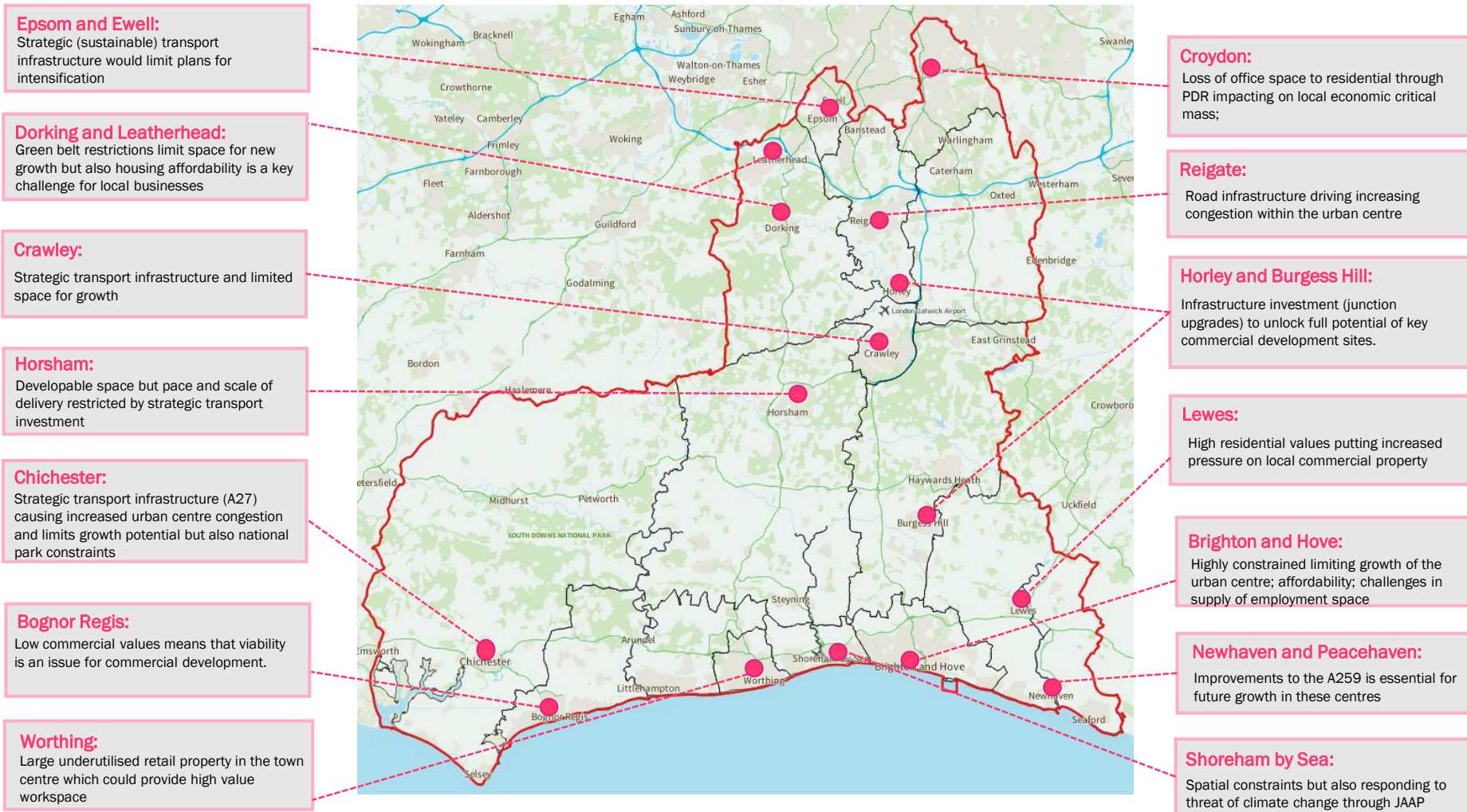
- 4. Challenges in retaining talent :** the Coast to Capital Economic Profile highlights the significant skills and employment challenges which exist across the area, partly as a result of constraints in housing supply and affordability impacting on the ability of the area to retain talent. This is a challenges common across many of the urban centres, and while the area benefits from three universities, there is consensus that the benefits of this from a talent pipeline perspective are not being maximised.
- 5. Delivery mandate:** across parts of Coast to Capital, increasing challenges are being experienced regarding local consensus regarding future economy and growth aspirations, and hence regarding the 'mandate' for delivery. While this is particularly an issue in rural areas (and in particular areas where new communities or major urban extensions are being planned), it is also increasingly common within urban areas. In a number of instances there has been a change in political landscape as a direct consequence of local concern regarding the scale or nature of growth ambitions.

Aside from these cross-cutting constraints, there are also a range of more granular and locally specific barriers and constraints which are particularly to each urban centre. A snapshot of some of the most significant factors which were identified during consultation with the 14 local authorities and two county councils is presented overleaf.



5.3. Mapping Local Barriers to Delivery

Summary of locally specific barriers and constraints



This map provides a snapshot of the individual constraints and barriers which are affecting the different urban centres. Information is based on conversations held with local authorities in summer 2019. More detail on the opportunities and constraints within each centre can be found in the gazetteer in Appendix A.



5.4. Understanding Strategic Support Needs

The future vitality of Coast to Capital's network of urban centres will be defined to some extent by the response to the barriers which are constraining prosperity and which have the potential to undermine the opportunity. Strategic action to lobby for the needs of the area as a whole and to respond to common areas of need and constraint will need to form part of the response.

While the specific support needs will vary according to each of these categories, local authorities were clear on a number of cross cutting points:

- + The needed for long term confidence and certainly regarding future strategic approaches and investment plans
- + The importance of strong partnership working and collaboration across the sub-region to respond to areas of need and constraint which cannot be resolved locally (e.g. housing and commercial property, labour market, and strategic transport challenges).

Further common messages from local authorities regarding future support needs for urban centres include the need for:

- + Strategic support and intervention (from the LEP and government agencies such as Homes England) to bring forward delivery of complex sites
- + Ongoing support for cross-boundary plan making – be its at the sub-regional level (e.g. the Greater Brighton Economic Board) or the regional level (e.g. Transport for the South East)
- + Greater support for local plan making, strategy development and case making

- + Support for the development a local and regional investment pipelines, helping to increase understanding of varying need and focus across different area, and to improve transparency in future investment decisions
- + Longer term funding commitments from government to enable greater commitment from local and regional partners in planning over longer time period and in tackling the more deeply embedded constraints
- + Ongoing financial support and investment for smaller scale and locally specific projects (e.g. town centre enhancements) which are fundamental to protecting resilience and building investor confidence.



5.5. Tailoring the Response to Local Need and Opportunity

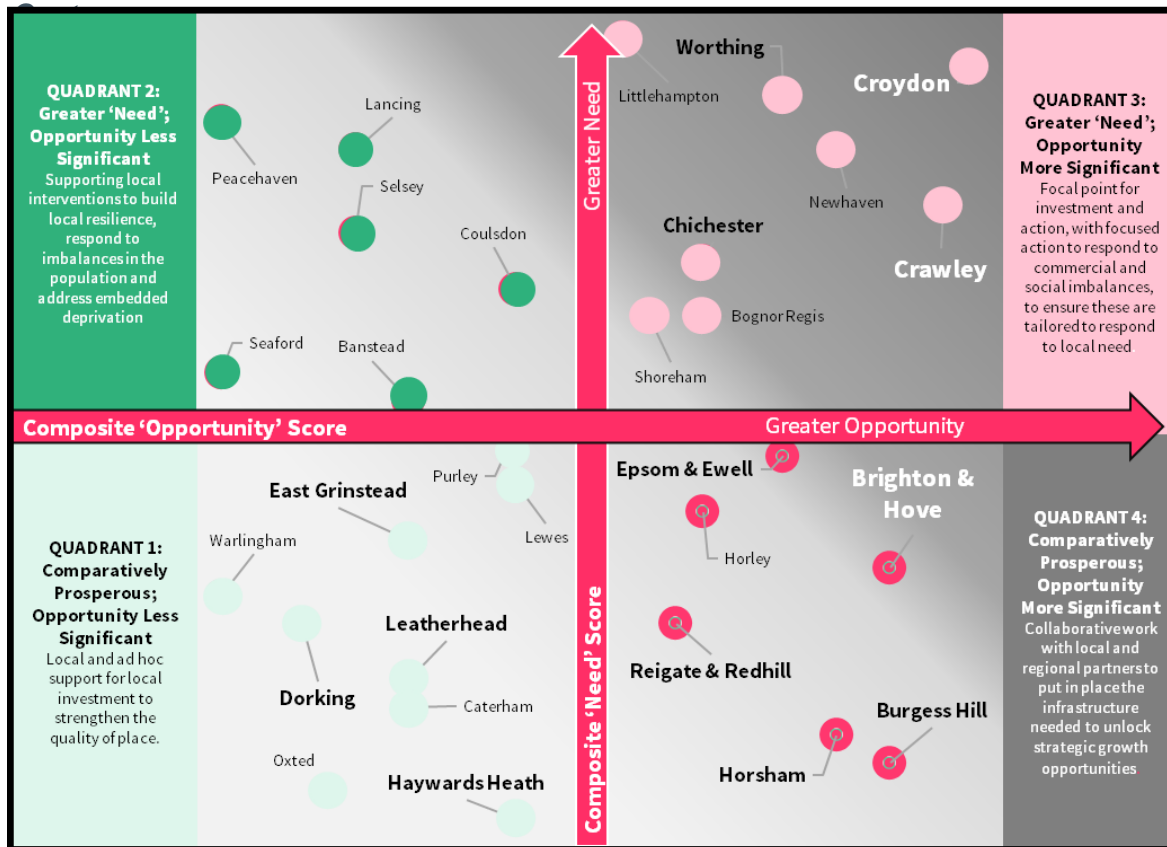
While the previous page highlights common 'strategic' support needs, the diverse nature of Coast to Capital's urban centres necessitates a place specific approach, with the response tailored to the local context.

The comparative assessment of the urban centres introduced earlier in the chapter provides a basis from which to compare and differentiate between the support needs of different urban centres, with four main groups identified:

- + Comparatively prosperous, less significant opportunity: focus on maintaining local resilience and competitiveness
- + Greater need, less significant opportunity: focus on: targeted action to respond to specific areas of need with a focus on building prosperity
- + Greater need, more significant opportunity: strategic investment to unlock opportunities, with a focus on using growth as an opportunity to respond to need and build prosperity
- + Comparatively prosperous, more significant opportunity: strategic investment to unlock opportunities, maintaining and strengthening local resilience in doing so.

The analysis provides the basis for our recommendations in the next chapter. As before, it should also be noted that the analysis marks a snapshot at a certain point in time, and that the context of different urban centres will inevitably evolve over time.

Categorisation of Differing Support Needs and Focus Across the Urban



Key: Typeface of place names relates to current economic function (see Chapter 2) for full typology:

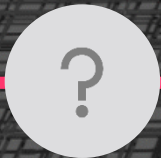
Primary productivity drivers

Sub-Regional hubs

Local service centres



Chapter 6. Recommendations





Chapter 6: Recommendations

6.0. Introduction

This chapter sets out recommendations for Coast to Capital in response to the analysis and findings presented in the previous chapters. The recommendations acknowledge the important role of the urban centres as drivers of the Coast to Capital economy, and thus the important opportunity that the process of developing the Local Industrial Strategy presents in maintaining and enhancing their strength and competitiveness.

The Coast to Capital Local Industrial Strategy provides an excellent opportunity to position the network of urban centres at the heart of future discussions regarding the focus of strategic investment. It also provides an opportunity to embed a clearer understanding of the role and value of the network of urban centres as a whole, recognising that the need and case for investment is rapidly evolving, and that a collaborative, agile and long term approach will be needed to maintain and enhance the ‘prosperity’ of the network.

In looking to take forward the findings of this research, the Local Industrial Strategy should focus on **building a stronger, more resilient and future facing network of centres which provide the focal point for inclusive growth across the LEP over the coming decades.**

In doing so, and in defining future approaches to supporting the network of urban centres, the starting point must be an understanding of the varying contexts and aspirations of each place. The ultimate ‘purpose’ and ‘end goal’ of support is likely to vary in a number of ways:

- + **Unlocking growth:** for some urban centres, the focus will be entirely on unlocking new growth (homes and jobs), and responding to the barriers which may be constraining this (e.g. strategic infrastructure or site assembly)
- + **Supporting rejuvenation or regeneration:** in other instances, the focus of support may be on responding to deeply embedded areas of need and / or enhancing existing places, spaces or assets (e.g. catalysing investment in areas with a viability gap or investing in specific social infrastructure)
- + **Building resilience:** in other cases, the focus on support may be on ‘protecting the status quo’, recognising that while levels of prosperity may be relatively strong, external factors and competition have the potential to undermine this over time (e.g. future proofing town centres against changing consumer and investor demand).

Recommendations from the urban centres research are summarised to the right and introduced in more detail over the rest of this chapter.

Summary of Recommendations

Recommendation Area	Recommendation
A. Developing the Support and Investment Pipeline	A1. Defining the support package A2. Visioning and Strategy A3. Pipeline Development
B: Cross boundary working to tackle strategic barriers across the urban centres	B1. Cross-Boundary Planning B2. Strategic Infrastructure
C: Targeting support spatially to reflect areas of greatest need and opportunity	C1. Focused support for urban centres with greatest potential for ‘change’ C2. Strengthening socio-economic resilience across smaller urban centres
D: Focusing support thematically to support more distinctive, resilient and competitive town centres.	D1. Town centre vitality D2. Commercial Space D3. Assets and Anchors D4. Local Accessibility



6.1. Recommendation Area A: Developing the Support and Investment Pipeline

The research has highlighted the need for a long term and consistent approach in supporting the evolution and growth of Coast to Capital's network of urban centres.

For Coast to Capital, this means continuing to work collaboratively with the counties and local authorities to understand urban centre performance, need and opportunity, to inform local visioning and strategy development, and to establish a clearer pipeline of support and investment.

Specific focal points for action are summarised in the table to the right.

Developing the Support and Investment Pipeline: Key Recommendations

Recommendation	Summary	Spatial Focus
A1. Defining the Support Package	<p>As a starting point and building upon the findings of this research, Coast to Capital should use the opportunity presented by the Local Industrial Strategy to define a clear package of support for urban centres across the area. This might range from capital funding to support local project delivery, to revenue support for visioning and strategy development, and to wider 'in-kind' / resource support building local capacity, partnerships and cases for investment.</p> <p>Greater clarity on the type of support which are likely to be available will enable local authorities to plan for the long term with greater confidence.</p>	Coast to Capital wide
A2. Visioning and Strategy	<p>As would be expected, there is a large degree of disparity across the urban centres in terms of local visioning and strategy: while a small number of the urban centres have recent and in-depth visions or masterplans, in many instances local visioning is out of date, or not present at all.</p> <p>While not precluding the potential for future 'ad hoc' support or investment, there is a strong case that the most significant intervention should be set within the context of clear strategic intent or vision, clearly contributing towards long term ambitions and objectives.</p> <p>To this end, for the urban centres which offer the greatest case for investment in terms of need and opportunity, Coast to Capital should encourage and support the development of clear and up to date strategies (be it spatial or thematic) to provide parameters for future investment.</p>	Coast to Capital wide – but focused on urban centres with greatest need and opportunity (see Recommendation Area C) currently lacking a clear vision or strategy
A3. Pipeline Development	<p>Coast to Capital should continue to monitor 'prosperity' and 'opportunity' across the Urban Centre's, using the baseline provided within this evidence base as a reference point, and working closely with the local authorities across the area to keep information up to date.</p> <p>The evidence should be used to underpin the development of a new (and rolling) pipeline of support and investment needs across the urban centres, supporting Coast to Capital's decision making process, and encouraging urban centre partners to take a longer term approach to project planning, development and delivery.</p>	Coast to Capital wide but prioritisation of urban centres based on scale of need and opportunity – see Recommendation Area C.



6.2. Recommendation Area B: Cross Boundary Working to Tackle Strategic Barriers

The research has highlighted a number of cross-cutting and strategic level barriers which are acting as a constraint to the prosperity of the urban centres.

These barriers and constraints will only be addressed via continued commitment to collaboration and partnership working across urban centres and across boundaries over the long term.

Specific focal points for action are summarised in the table to the right.

Cross boundary working to tackle strategic barriers across the urban centres: Key Recommendations

Recommendation	Summary	Spatial Focus
B1. Cross-Boundary Working	<p>The network of urban centres underpins the sub-regional economy and provides the focal point for future opportunity. But the resilience, vitality and productivity of the network is being undermined by constraints in the supply of employment space, the affordability of homes and in the capacity of local and strategic infrastructure. Many of these challenges can not be resolved solely locally: they will require cross boundary collaboration and the development of new, joint responses.</p> <p>Existing partnerships and groupings (such as the Greater Brighton Economic Board and the Gatwick authorities) provide a strong platform from which to build, and via the Local Industrial Strategy, Coast to Capital should continue to encourage and support the development of these collaborative approaches. The focus should be on embedding a more strategic and long term approach to plan making and investment, with success judged on the performance and vitality of sub-regions as well as individual urban centres.</p>	<p>Across all Coast to Capital areas, but particularly geared around existing sub-regional groupings such as the Gatwick area, and the Greater Brighton Economic Board area</p>
B2. Strategic Infrastructure Investment	<p>Strategic infrastructure challenges (be it capacity and reliability of the Brighton Mainline, capacity on the motorways and major road network, or the quality and resilience of digital infrastructure) is perhaps the most common constraint impacting on the future growth potential of the urban centres.</p> <p>The current work of Transport for the South East on future transport strategy for the region marks an important opportunity to articulate the case for future investment in strategic infrastructure across Coast to Capital. Similarly, West Sussex's Gigabit programme provides a strong platform from which to build in future proofing digital infrastructure.</p> <p>The Coast to Capital Local Industrial Strategy provides an important opportunity to continue to build the case for future strategic infrastructure investment across the area, highlighting the transformational (and arguably nationally significant) impact that this can have in urban centres of high opportunity such as the Crawley (and the wider Gatwick City area).</p>	<p>As above, although here collaboration across key transport corridors (e.g. the A27 and the Brighton Mainline will be key)</p>

6.2. Recommendation Area C: Targeting Support Spatially

As noted at the start of this chapter, the focus of the LEP should be on supporting the vitality of Coast to Capital's network of urban centres as a whole – recognising that while these vary considerably in size, they all play an important role in underpinning the prosperity of the region, as centres of population and hubs of business and work.

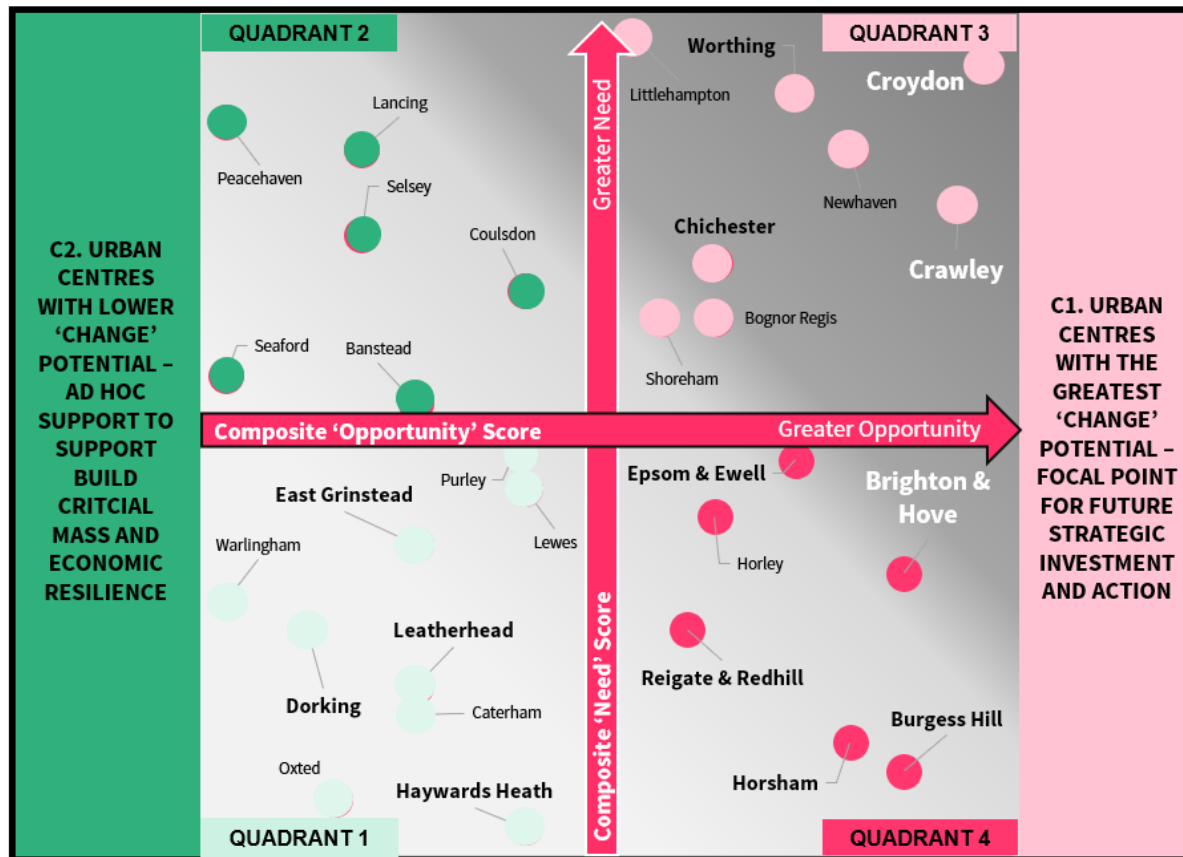
That said, the research has also clearly identified urban centres where need (in terms of prosperity) is comparatively high, and where 'opportunity' is greater. There is a clear case for Coast to Capital to focus more intensively on supporting these urban centres: where the potential to deliver the uplift in local economic and social prosperity is most significant.

The analysis provided in the chart to the right supports two key spatial recommendations:

- + C1. Focus support on the areas demonstrating the greatest potential for 'change', with a focus on tackling inequality, and unlocking new growth and investment (urban centres identified in quadrants 3 and 4)
- + C2. Continue to provide support where needed for other (typically smaller) urban centres, with a focus on maintaining competitiveness and resilience (urban centres identified in quadrants 1 and 2).

These two recommendations are explored in more detail overleaf.

Using the Assessment to Define Urban Centre Support Needs



Key: Typeface of place names relates to current economic function (see Chapter 2) for full typology:

Primary productivity drivers

Sub-Regional hubs

Local service centres



6.2. Recommendation Area C: Targeting Support Spatially

C1. Focus support on the areas demonstrating the greatest potential for 'change' (quadrants 3 and 4)

The research has highlighted that opportunities for investment, regeneration, or growth existing in nearly all of Coast to Capital's 29 Urban Centres.

However, the scale of need and the nature of opportunities vary significantly: in a number of cases opportunities appear 'transformational' and / or nationally significant; in other cases the opportunities have a more regional scale of importance.

The analysis of need and opportunity summarised on the previous page has been used to identify the urban centres where future support and investment should be focused to deliver maximum outcomes from a socio-economic perspective (effectively quadrants 3 and 4 of the chart).

This outline typology of urban centres is summarised in the table to the right; again, it should be noted that this represents information at a point in time and will need to be continually updated to reflect the evolving project pipeline.

C1. Prioritising Investment Across the Network of Urban Centre to Maximise Benefit

	Urban Centre
<p>Potential for: 'Transformational' change.</p> <p>Focus for support: securing the infrastructure, mandate and investment needed to unlock potential</p>	<p>The area around Gatwick Airport, taking in Crawley and Horley urban centres, and the north of Horsham, presents arguably the greatest opportunity for 'transformational' growth within Coast to Capital's urban centres. The delivery of the 'Gatwick City' aspiration will require a long term strategic focus, close working with government and cross boundary collaboration:</p> <ul style="list-style-type: none"> • Crawley (taking in parts of north Horsham) – significant opportunities to deliver significant new commercial and residential development on Gatwick safeguarded land; need for new transport connections to link to emerging north Horsham communities. • Horley (Horley Business Park) linked to Crawley and – opportunity to deliver greater commercial critical mass for Gatwick (3.2m sq ft and c.20,000 jobs), reaffirming and strengthening its national importance and directly responding to regional employment land need.
<p>Potential for Nationally significant change.</p> <p>Focus for support: reinforcing and strengthening economic position and identity, responding to the productivity challenge, putting in place foundations for 'future-enabled' places, economies and communities</p>	<ul style="list-style-type: none"> • Brighton & Hove – opportunities to continue to embed the importance of the city as a nationally significant economic hub and cultural asset and to test new approaches to mobility and environmental resilience, along with a need to tackle embedded inequality • Croydon – scale of growth and nature of the retail and leisure offer helping to transform palace identity and reinforce the dynamism of London's economy; significant opportunities to respond to embedded deprivation and challenge. • Epsom and Ewell – nascent plans to adopt a new, bolder approach to growth to secure the delivery of new homes and maximise the Crossrail 2 opportunity: potential testbed for new approaches in housing delivery and in future of mobility.
<p>Potential for Regionally significant change.</p> <p>Focus for support: supporting infrastructure enhancements needed to unlock opportunity sites, 'future-proof' new development, build economic critical mass, increase productivity, and create opportunities for Coast to Capital residents.</p>	<ul style="list-style-type: none"> • Burgess Hill – significant urban extensions, creating additional demand for services, infrastructure and jobs • Bognor Regis – Enterprise Bognor Regis as an opportunity to stimulate growth in the Coastal West Sussex economy, and to tackle inequality • Newhaven – Enterprise Zone providing a focal point for regeneration and investment, supporting aspirations to build prosperity • Chichester – Southern Gateway scheme enhancing town centre offer and creating greater critical mass • Reigate and Redhill – potential for urban extensions and ongoing regeneration of town centre sites • Worthing – number of significant development sites within the urban centre focused on diversifying the town centre and attracting high value employment • Shoreham-by-Sea – the Harbour and Portslade developments will provide significant jobs and homes in a centre adjacent to Brighton and Hove, spreading opportunity westwards whilst also managing significant environmental threats. • Littlehampton – Statistically the greatest levels of need. Opportunity to test new approaches to addressing social and economic prosperity within coastal communities. • Horsham – significant urban extensions and capacity to absorb major housing and employment growth • New settlements – e.g. South Godstone.



6.2. Recommendation Area C: Targeting Support Spatially

C2. Strengthening socio-economic resilience across smaller urban centres (quadrants 1 and 2)

As noted previously, the overall aspiration for Coast to Capital should be to continue to support and enhance the vitality of the network of Urban Centres as a whole.

Beyond the urban centres where the potential for 'change' is greatest (identified in C1), Coast to Capital should continue provide support where needed across the broader network of urban centres to help respond to areas of specific need or opportunity (effectively quadrants 1 and 2 of the chart).

Support required may be more ad hoc in nature, and the focus is likely to be on strategy development, building local economic resilience (diversifying the economy, and enhancing town centre vitality) and supporting interventions to respond to specific areas of socio-economic challenge (e.g. skills, employment and business support).

Examples of the different types of support which might be required are provided to the left; again, it should be noted that this represents information at a point in time and will need to be continually updated to reflect the evolving project pipeline.

C2. Supporting Local Resilience and Competitiveness

	Urban Centre
Potential for Locally Significant Change Focus on diversifying economy to enhance resilience	Example urban centres: <ul style="list-style-type: none"> • Lewes – North Street Regeneration as an opportunity to diversify the economy and strengthen town centre vitality • Haywards Heath – current masterplan to identify growth opportunities • Caterham – proposed regeneration of the shopping centre and investment in local workspace supporting enhanced town centre offer • Leatherhead – delivering the Transform Leatherhead strategy will diversify the town centre and drive increased footfall to enhance vitality. • Dorking – working with Mole Valley District Council throughout the local plan development process to understand where growth can be accommodated and how plans can align with Coast to Capital's strategic objectives for the region. • Lancing – opportunity to utilise development momentum at New Monks Farm and other potential development sites to enhance prosperity and drive town centre vitality
Limited 'change' Potential Focus on sustaining vitality & function	Example urban centres: <ul style="list-style-type: none"> • Purley and Coulsden – limited growth potential or desire for growth locally; housing issues likely to be addressed through strategic action to tackle affordability. • East Grinstead – focus on local investment to enhance connections and to underpin the vitality of the local service offering • Oxted and Warlingham – focus on support town centre vitality and enabling small scale growth opportunities where these come about • Seaford and Peacehaven – heavily constrained by geographic and local mandate for growth; support needs likely to be focused around challenges of ageing population, and local town centre vitality • Selsey – limited growth potential; ongoing support to enhance socio-economic participation and inclusion, particularly linked to seasonal population changes • Banstead – limited growth potential; local investments to support local employment and service function of the centre.



6.3. Recommendation Area D: Focusing Support Thematically

While the local context varies considerably from one urban centre to the next, the research has highlighted a number of common factors which are constraining prosperity and opportunity.

Addressing these factors provides a focal point for future support and action, and via the Local Industrial Strategy, the LEP should consider ways in which tailored packages can be developed to ensure future support and investment is targeted in a more consistent way.

Cutting across delivery Coast to Capital should focus support on:

- + Building local distinctiveness, recognising the importance of identity in local and regional competitiveness
- + Supporting economic diversification, encouraging greater economic critical mass across a broader and more productive range of activities
- + Strengthening levels of inclusion, putting Coast to Capitals people and communities at the forefront of future ambition and responding to embedded deprivation and concerns regarding shifting demographic balance.

Key areas for focus are summarised in the table to the right.

Focusing Support Thematically: Key Recommendations

Recommendation	Summary	Spatial Focus
D1. Town centre vitality	<p>The Urban Centres are all in part defined by their function as retail, leisure, cultural and civic hubs. But high street vitality is under greater pressure than ever, reflecting national retail trends, local labour market patterns (e.g out-commuting) and a long term deficit in place 'investment'. To date, the urban centres have largely struggled to make the case to MHCLG for investment via the Future High Streets Fund</p> <p>The LEP should continue to support concerted action to build local resilience and to support evolution and transition in line with changing market demands and needs – including work to define future strategy, build investment cases, and support targeted action and delivery.</p>	<i>All urban centres – including those with existing need (i.e high vacancy), but also those with wider structural issues which will impact on future performance</i>
D2. Commercial Space	Across all urban centres, the supply of commercial space is a common challenge and has widespread implications: affecting economic critical mass, levels of productivity, town centre vitality, and labour market dynamics. Concerted action is needed to protect the current supply of space, and to bring forward a pipeline of new spaces across a range of typologies (i.e. both flexible spaces for smaller businesses, and spaces for businesses to grown on or invest in). More detailed recommendations in this are provided within the Coast to Capital Commercial Property Study.	<i>All urban centres – but particularly the Primary Productivity Drivers and the Sub-Regional Hubs</i>
D3. Assets & Anchors	<p>There are a diverse range of anchor institutions across the Urban Centres serving economic, social and cultural purposes – from universities and colleges to theatres and civic hubs. These assets and anchors have a fundamental role to play in supporting the growth and evolution of the Urban Centres, from their role as employers, to their role as leaders and innovators in their fields, and to their role in promoting local and sub-regional identity.</p> <p>In supporting evolution and growth across the Urban Centres, Coast to Capital should prioritise encourage closer collaboration and commitment to work collaborative across sectors and institutions (from business to education to culture) towards shared principles and objectives – enhancing the coherency and efficiency of delivery and maximising socio-economic potential.</p>	<i>All urban centres – but particularly those with regionally significant assets (e.g. universities, colleges, theatres and visitor assets)</i>
D4. Local Accessibility	Local connectivity – be it within existing urban area, or to new sites / opportunities is a common factor affecting local vitality and future opportunity. Enhancing local connectivity has been a long standing area of investment for the LEP, and this should remain an important priority. In doing so, investment should be geared towards supporting long terms needs and resilience, encouraging innovation in	<i>All urban centres – but particularly those with strong growth</i>



Appendix A: Gazetteer

Appendix A. Gazetteer of Coast to Capital Urban Centres

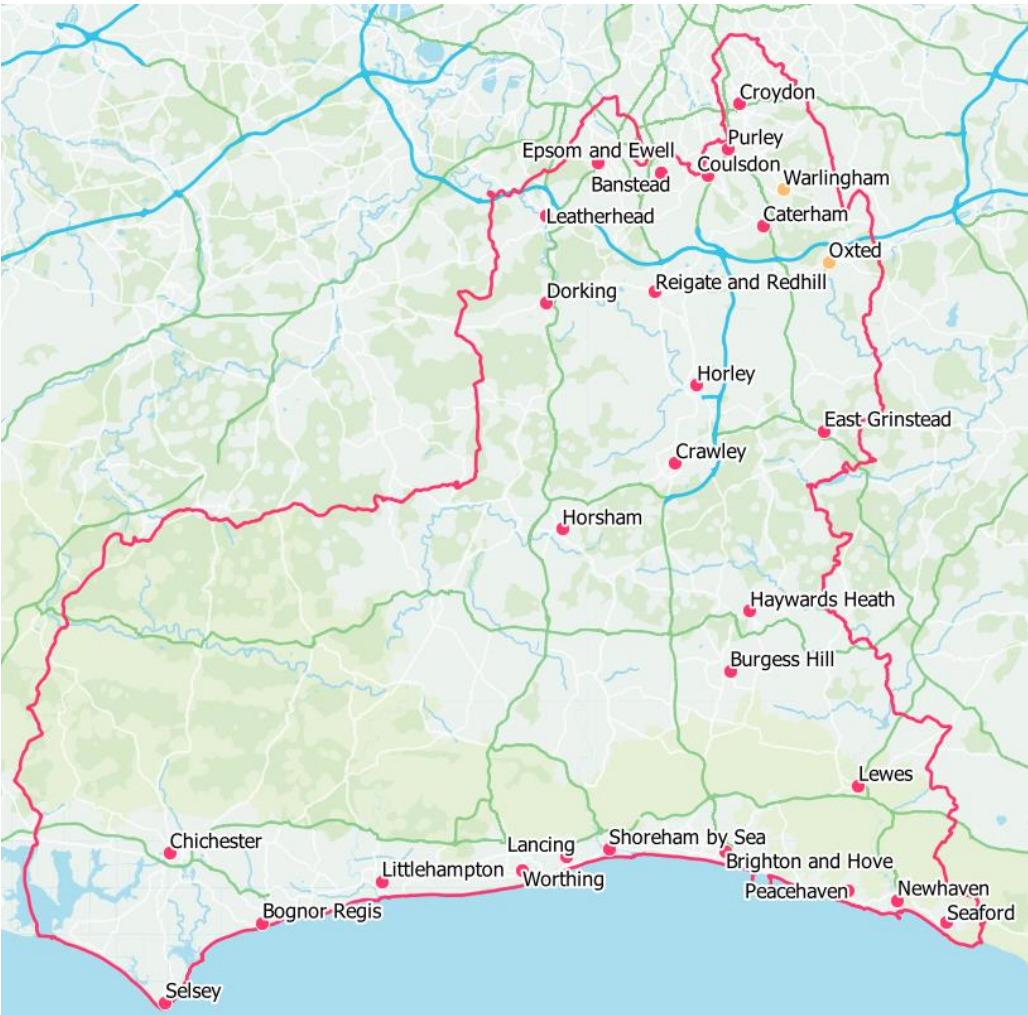
Introduction

This chapter provides a statistical snapshot of Coast to Capital’s 29 Urban Centres. The analysis focuses on the profile of each local authority area as a whole, before exploring the performance and opportunity of the Urban Centres within each local authority area.

The Gazetteer is structured as per the table below.

Local Authority	Urban Centres
1. Adur	Lancing; Shoreham-by-Sea
2. Arun	Bognor Regis; Littlehampton
3. Brighton and Hove	Brighton and Hove
4. Chichester	Chichester; Selsey
5. Crawley	Crawley
6. Croydon	Croydon; Purley; Coulsdon
7. Epsom and Ewell	Epsom and Ewell
8. Horsham	Horsham
9. Lewes	Lewes; Newhaven; Peacehaven; Seaford
10. Mid Sussex	Burgess Hill; East Grinstead
11. Mole Valley	Dorking; Leatherhead
12. Reigate and Banstead	Reigate and Redhill; Horley; Banstead
13. Tandridge	Oxted; Warlingham; Caterham
14. Worthing	Worthing

Coast to Capital’s Urban Centres



Appendix A. Gazetteer of Coast to Capital Urban Centres

1. Adur: The District at a Glance



21,000 jobs and **37,220** working age residents



Median resident earnings are **£26,757**



House prices are **12.2 times** resident's median earnings



£1,170m total GVA

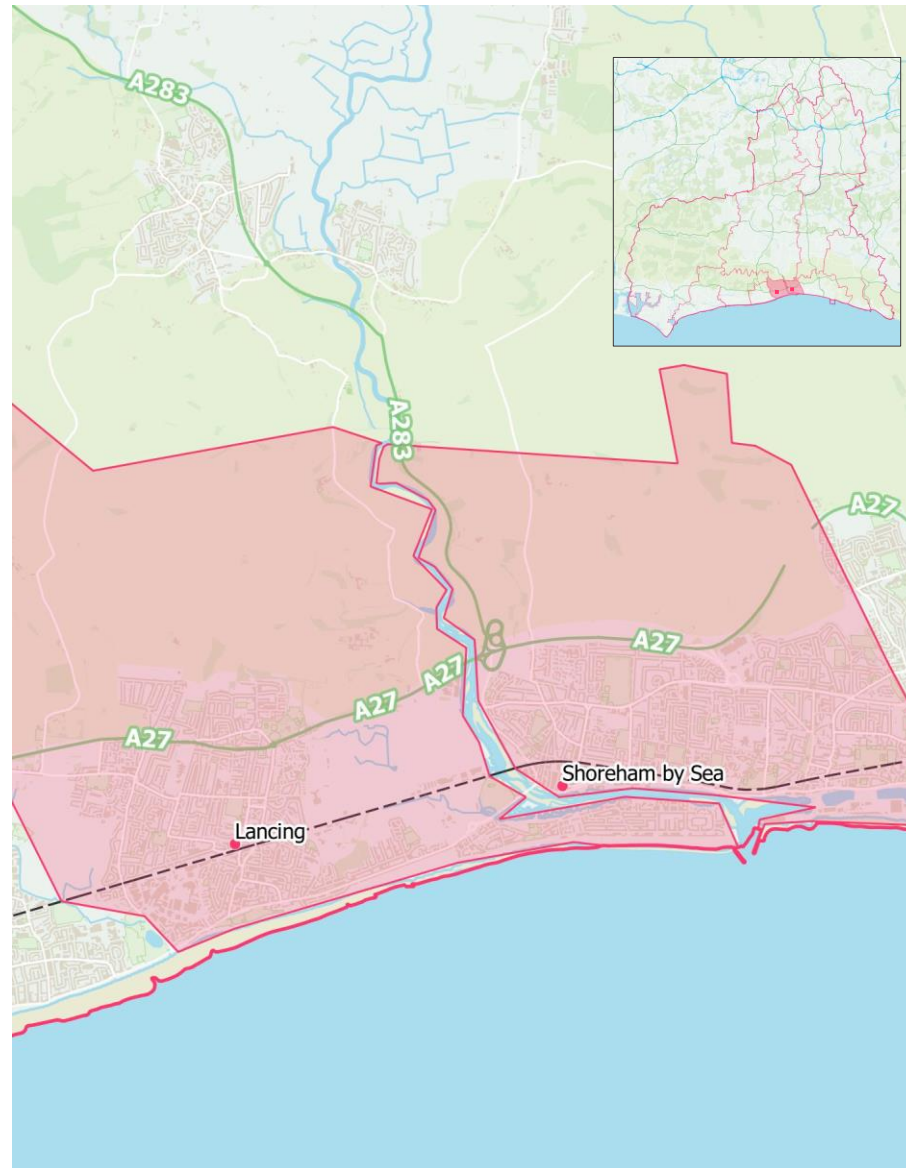
Importance to Coast to Capital:

2% of jobs

3% of working age residents

2% of GVA output

Adur's urban centres (best fit statistical geography definition)



Appendix A. Gazetteer of Coast to Capital Urban Centres

1a. Adur Urban Centres In Numbers: Lancing

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	8,825	19	596,910	26.4m
Jobs to People Ratio (2017)	0.6	17	0.5	0.3
% Amenity Jobs (2017)	35%	25	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	23,910	19	1.3m	55.6m
Population Growth (2012-17)	2%	27	5%	4%
% LSOAs in the top 50% most deprived (2019)	44%	23	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	13%	8	26%	-
% reporting 'Good' Health (2011)	39%	28	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	18%	1	4%	10%
% vacant town centre units (2019)	9%	12		-
Office Vacancy (2019)	2%	17		-
% Knowledge Jobs (2017)	23%	6	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	13%	24	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

1b. Adur Urban Centres In Numbers: Shoreham by Sea

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	11,385	15	596,910	26.4m
Jobs to People Ratio (2017)	0.4	18	0.5	0.3
% Amenity Jobs (2017)	43%	18	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	32,510	13	1.3m	55.6m
Population Growth (2012-17)	4%	14	5%	4%
% LSOAs in the top 50% most deprived (2019)	43%	22	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	5%	3	26%	-
% reporting 'Good' Health (2011)	45%	21	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	10%	7	4%	10%
Town Centre Vacancy (2019)	8.6	11	-	-
Office Vacancy (2019)	1%	10	-	-
Knowledge Jobs (2017)	13%	21	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	10%	21	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

1c. Adur Urban Centres Opportunity Assessment and Conclusions

Growth Potential

Opportunities

- + **Lancing:** Lancing's proximity to Brighton represents a primary opportunity which could drive the centre's attractiveness to investment in the near future. Like other adjacent coastal towns, there is potential for Lancing to capture 'coastal drift' from Brighton which could significantly enhance the prosperity of the town. There are a number of positive recent developments in which demonstrate momentum in Lancing including the Brighton and Hove Albion Football Club training ground.
- + **Shoreham by Sea:** A number of key development sites have also come forward in Shoreham by Sea

Key sites

- + **Lancing:** New Monks Farm. This development will provide 600 homes (30% affordable), 35,000m2 of commercial space, a new primary school, country park and access to the A27. A number of sites along Lancing high street have also been identified by council officers as potential future opportunities.
- + **Shoreham by Sea:** Harbour Joint Area Action Plan – this major regeneration programme will future-proof the urban centre with upgraded flood defences, environmental improvements and sustainable transport provision as well as significant commercial housing development. There is also major plans for the Portslade end of Shoreham Harbour which could provide 1,400 new homes and 23,500m2 of employment space.

Constraints and Challenges

- + **Lancing:** Officers noted the need for investment in Lancing. The centre was subject of an unsuccessful Expression of Interest to the Future High Street Fund. The EOI noted the following challenges affecting the centre: The town centre has a limited number of units (7 units or 4% of total units) dedicated to A3 Services such as bars, cafes and restaurants. This limited offer has severe implications for dwell time within the town centre.
- + **Shoreham by Sea:** Shoreham is a significant flood risk. Sea level rises could significantly affect the urban centre and the river Adur has also flooded in recent years. However, local partners are seeking to alleviate flood risks through LEP investment and the package of interventions brought forward as part of the Joint Area Action Plan.

Summary Assessment

Assessment Findings

	Urban Centre	Typology / Score	Rank (of urban centres)
Function Assessment	Lancing	Service Focused Hubs	n/a
	Shoreham by Sea	Service Focused Hubs	
Prosperity Assessment	Lancing	189	5 th
	Shoreham by Sea	171	11 th
Opportunity Assessment	Lancing	13	23
	Shoreham by Sea	18	13
Support Quadrant	Lancing	2	n/a
	Shoreham by Sea	3	

Assessment Conclusions

- + **Lancing (locally significant change potential):** Need in Lancing is high, the centre suffers from significant challenges around high street vitality and deprivation. Whilst opportunity and capacity for growth is not at the same level as adjacent urban centres (such as Worthing and Shoreham), the New Monk's Farm developments could enhance the town's attractiveness as people continue to migrate out of Brighton.
- + **Shoreham by Sea (Tier 3 – regionally significant change potential):** Whilst need in Shoreham is relatively high, it is more prosperous than many of the other coastal urban centres. Plans are already well developed to tackle physical threats to the centre's prosperity and will be accompanied by significant development which will bring more jobs and homes to the town.

Appendix A. Gazetteer of Coast to Capital Urban Centres

2. Arun: The District at a Glance



47,000 jobs and **87,868** working age residents



Median earnings are **£27,816**



House prices are **12.3 times** resident's median earnings



£2,550m total GVA

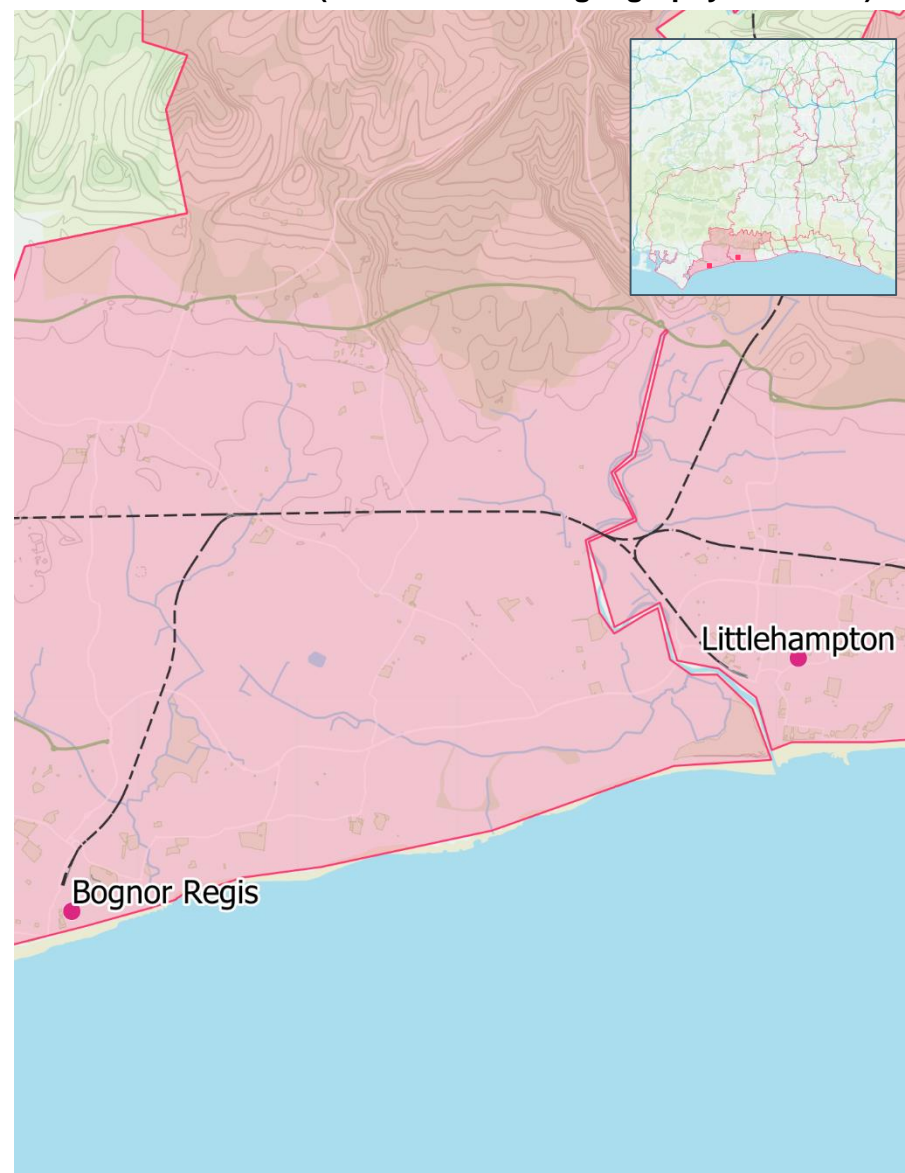
Importance to Coast to Capital:

5% of jobs

7% of working age residents

5% of GVA output

Arun's urban centres (best fit statistical geography definition)



Appendix A. Gazetteer of Coast to Capital Urban Centres

2a. Arun Urban Centres In Numbers: Bognor Regis Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	18,990	10	596,910	26.4m
Jobs to People Ratio (2017)	0.3	26	0.5	0.3
% Amenity Jobs (2017)	46%	15	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	70,170	5	1.3m	55.6m
Population Growth (2012-17)	7%	6	5%	4%
% LSOAs in the top 50% most deprived (2019)	41%	20	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	27%	18	26%	-
% reporting 'Good' Health (2011)	41%	24	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	7%	14	4%	10%
Town Centre Vacancy (2019)	7.7%	8	-	-
Office Vacancy (2019)	0%	1	-	-
Knowledge Jobs (2017)	9%	28	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	5%	17	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

2b. Arun Urban Centres In Numbers: Littlehampton Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	17,395	11	596,910	26.4m
Jobs to People Ratio (2017)	0.3	23	0.5	0.3
% Amenity Jobs (2017)	54%	6	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	61,870		1.3m	55.6m
Population Growth (2012-17)	3.5%	17	5%	4%
% LSOAs in the top 50% most deprived (2019)	39%	23	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	17%	16	26%	-
% reporting 'Good' Health (2011)	40%	26	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	+993	12	4%	10%
Town Centre Vacancy (2019)			-	-
Office Vacancy (2019)	1.2%		-	-
Knowledge Jobs (2017)	8%	29	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	5%	17	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

2c. Arun Urban Centres Opportunity Assessment and Conclusions

Growth Potential

Opportunity

- + **Bognor Regis:** Bognor Regis has a large population and has received significant investment in recent years: benefitting from a new Higher Education presence (the new £36m University of Chichester Engineering & Digital Technology Park which opened in 2018) and prominent businesses (such as Rolls Royce) choosing to locate in the town. Bognor Regis is also home to a major employer in the tourism sector (Butlins). The resort attracts 200,000 visitors to the site every year and the business has invested significantly in the town. There is also less of a focus on keeping people on site and Butlins work collaboratively with Arun Council to promote local attractions within the Coast to Capital area. The council are working with Butlins to improve the town centre offering to increase visitor footfall and have invested in public realm enhancements. Whilst the Council benefits from an effective working relationship with Butlins, it is felt that there is still a limited town centre offering for returning visitors.
- + **Littlehampton:** Whilst Littlehampton is smaller than Bognor Regis, there is large housing development planned for the centre which will need to be accompanied by jobs and town centre investment in order to realise nascent growth potential. Despite this, the majority of Council-led regeneration has been focused on Bognor Regis to date.

Key sites

- + **Bognor Regis:** Enterprise Bognor Regis represents a large strategic employment site which could provide space for up to 4,133 jobs. This could be a key part of a holistic package of measures to address the social issues facing Bognor Regis. However, the council noted difficulties in terms of land values which was affecting the viability of bringing forward a solely workspace proposal.
- + **Littlehampton:** Mainly public realm, visitor economy and residential-led development rather than commercial space.

Constraints and Challenges

- + **Bognor Regis and Littlehampton:** The two centres share many of the same challenges and growth constraints. The political leadership of the District has recently changed to the Liberal Democrats. Many new councillors have been elected on an anti-development manifesto, therefore there is uncertainty locally around major town centre regeneration schemes (specifically in Bognor Regis). Officers noted that demographic factors are constraining Arun's growth meaning that the town is characterised by ageing, low skilled population. Recent developments, such as a new Higher Education presence in the town can begin to address this. The centres also suffer from relatively low commercial values which affects viability and also a shortage of quality office premises.

Summary Assessment

Assessment Findings

	Urban Centre	Typology / Score	Rank (of urban centres)
Function Assessment	Bognor Regis	Service Focused Hubs	n/a
	Littlehampton	Service Focused Hubs	
Prosperity Assessment	Bognor Regis	171	11 th
	Littlehampton	213	1 st
Opportunity Assessment	Bognor Regis	21	9 th
	Littlehampton	17	14 th
Support Quadrant	Bognor Regis	3	n/a
	Littlehampton	3	

Assessment Conclusions

- + **Bognor Regis (potential Tier 3 for regionally significant change):** Although Bognor Regis currently has low economic densities, it has the capacity to accommodate a significant amount of the region's commercial development over the coming years. Due to low land values, there is a need for public investment to bridge the viability gap and realise growth ambitions.
- + **Littlehampton (potential Tier 3 for regionally significant change):** Whilst Littlehampton has many of the same challenges as Bognor Regis, there are currently less plans growth within the urban centre, with the majority of Arun's growth centred on Bognor Regis. There is an opportunity to test new approaches to addressing social and economic prosperity within coastal communities.

Appendix A. Gazetteer of Coast to Capital Urban Centres

3a. Brighton and Hove: The City at a Glance



137,000 jobs and **204,444** working-age residents



Median earnings are **£29,999**



House prices are **12.7 times** resident's median earnings



£7,350m total GVA

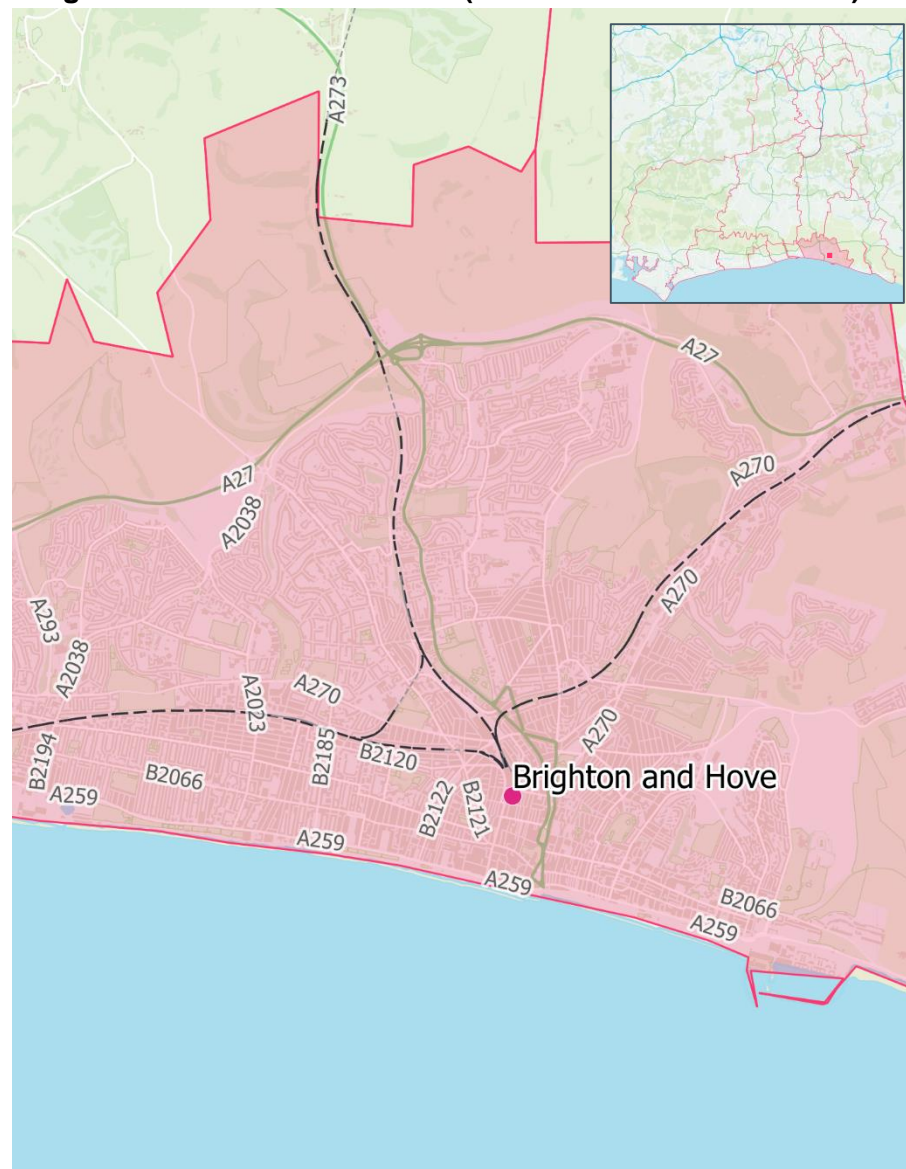
Importance to Coast to Capital:

14% of jobs

16% of working age residents

14% of GVA output

Brighton & Hove urban centres (best fit statistical definition)



Appendix A. Gazetteer of Coast to Capital Urban Centres

3b. Brighton and Hove – The Urban Centre In Numbers

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	139,495	1	596,910	26.4m
Jobs to People Ratio (2017)	0.5	9	0.5	0.3
% Amenity Jobs (2017)	46%	15	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	288,160	13	1.3m	55.6m
Population Growth (2012-17)	5%	13	5%	4%
% LSOAs in the top 50% most deprived (2019)	44%	24	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	25%	17	26%	-
% reporting 'Good' Health (2011)	49%	13	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	9%	9	4%	10%
Town Centre Vacancy (2019)	6.7%	5	-	-
Office Vacancy (2019)	1%	12	-	-
Knowledge Jobs (2017)	23%	7	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	36%	27	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

3c. Brighton & Hove Urban Centre Opportunity Assessment and Conclusions

Growth Potential

Opportunity

- + Alongside Croydon and Crawley, Brighton and Hove is the dominant economic hub within the Coast to Capital area
- + Via City Plan Parts 1 and 2, and within its new economic strategy, the council has set out clear growth ambitions for the city – delivering against residential targets, while also continuing to build the critical mass of the local economy
- + The Opportunity is largely focused around the delivery of a number of major regeneration sites within the city, a continued focus on enhancing the supply of commercial space, and reinforcing the role of the City as a retail and leisure hub; the visitor economy (business and leisure) continues to play an integral role in the City's economy, and there are aspirations to protect and strengthen this going forward.
- + An important focus on the environment and sustainability – embedded politically and strategically within the council.
- + Similar focus on the 'future' economy – investing in digital infrastructure and supporting the growth of the city's ICT and Digital sector
- + The city is a key driving force behind the Greater Brighton Economic Board, which is seeking to deliver a more collaborative approach to plan development and delivery across the sub-region.

Key sites

- + There are numerous major development sites across the city – including Circus Street, Preston Barracks, New England House and the Homes for Brighton programme
- + Ongoing improvements to the seafront
- + Ongoing proposals to redevelop the Brighton Centre to enable the delivery of an expanded city centre retail offer and to provide a more modern conference and events venue for the city
- + Severe space constraints are a significant issue impacting on the ability of the city to deliver against housing targets and to deliver new commercial space

Constraints and challenges

- + Severe space constraints are a significant issue impacting on the ability of the city to deliver against housing targets and to deliver new commercial space. Partly as a result of space constraints, housing affordability is a real challenge for the city, and is impacting on the overall balance of the local population and labour market. There are significant inequality challenges in the city, with concentrations of severe relative multiple deprivation deeply embedded in some communities. Strategic transport connections continue to present a challenge – both the Brighton Mainline and the A27

Summary Assessment

Assessment Findings

	Urban Centre	Typology / Score	Rank (of urban centres)
Function Assessment	Brighton & Hove	Primary Productivity Driver	n/a
Prosperity Assessment	Brighton & Hove	134	20 th
Opportunity Assessment	Brighton & Hove	25	3 rd
Support Quadrant	Brighton & Hove	4	n/a

Assessment Conclusions

- + **Tier 2: nationally significant change opportunity:** Reflecting its size, Brighton & Hove is home to perhaps the greatest concentration of major opportunity sites across the LEP area
- + Delivery momentum is relatively strong, although there are concerns that the wider slow down in the development sector is starting to impact on housing delivery trajectory
- + Recent delivery of new commercial space in the city marks a positive development, highlighting investor confidence in the quality and resilience of the city's economy
- + As a city with an international reputation, Brighton and Hove has a key role to play in driving Coast to Capital's economic identity – both from an inward investment perspective, but also in relation to the visitor economy.

Appendix A. Gazetteer of Coast to Capital Urban Centres

4a. Chichester: The District at a Glance



60,000 jobs and **68,427** working age residents



Median resident earnings are **£31,313**



House prices are **11.8 times** resident's median earnings



£3,130m total GVA

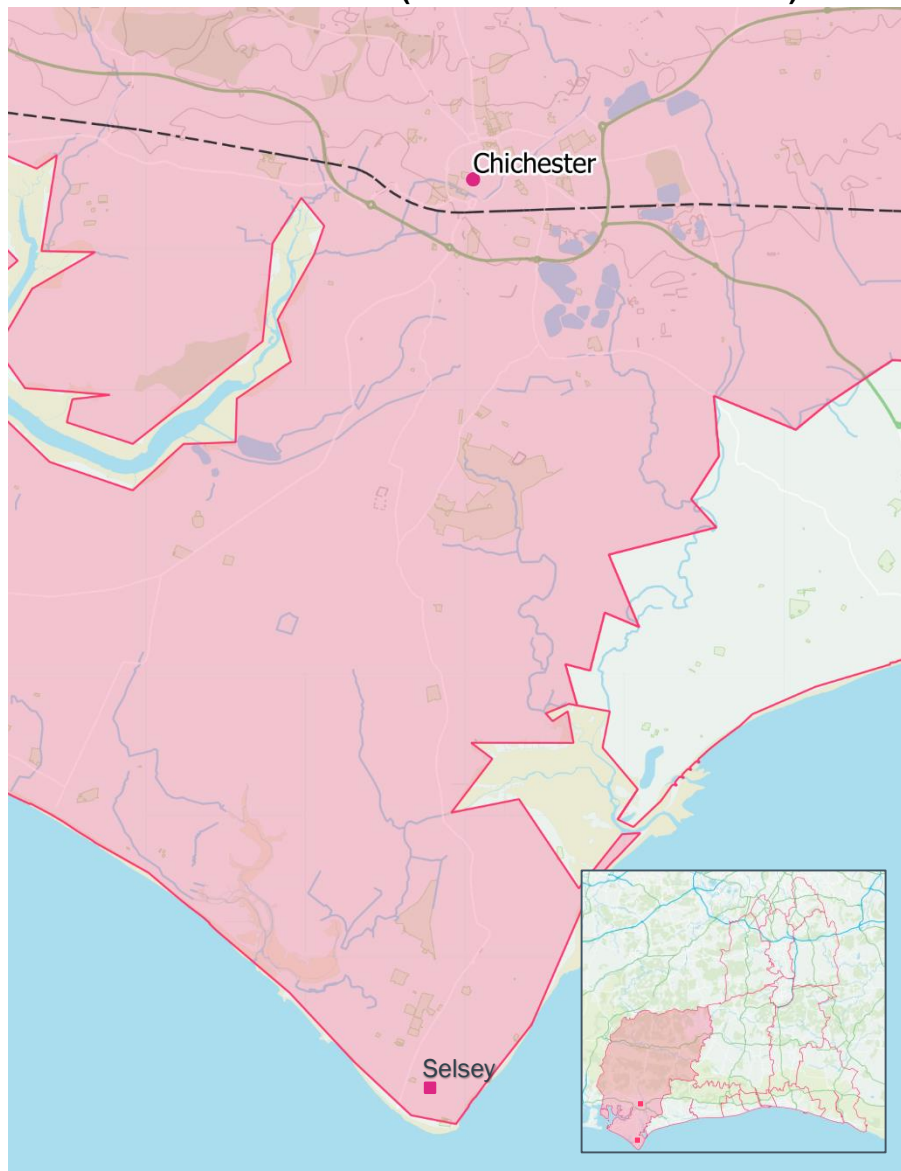
Importance to Coast to Capital:

6% of jobs

5% of working age residents

6% of GVA output

Chichester's urban centres (best fit statistical definition)



Appendix A. Gazetteer of Coast to Capital Urban Centres

4b. Chichester Urban Centres In Numbers: Chichester Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	26,350	7	596,910	26.4m
Jobs to People Ratio (2017)	0.9	2	0.5	0.3
% Amenity Jobs (2017)	63%	1	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	29,210	15	1.3m	55.6m
Population Growth (2012-17)	7%	5	5%	4%
% LSOAs in the top 50% most deprived (2019)	38%	18	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	19%	14	26%	-
% reporting 'Good' Health (2011)	46%	20	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	-12%	28	4%	10%
Town Centre Vacancy (2019)	7.3%	7	-	-
Office Vacancy (2019)	9%	26	-	-
Knowledge Jobs (2017)	15%	18	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	6%	18	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

4c. Chichester Urban Centres In Numbers: Selsey Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	3,430	27	596,910	26.4m
Jobs to People Ratio (2017)	0.3	21	0.5	0.3
% Amenity Jobs (2017)	1,160	29	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	10,710	27	1.3m	55.6m
Population Growth (2012-17)	0.6%	29	5%	4%
% LSOAs in the top 50% most deprived (2019)	50%	25	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	0%	2	26%	-
% reporting 'Good' Health (2011)	37%	29	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	-2%	23	4%	10%
Office Vacancy (2019)	4%	21	-	-
Knowledge Jobs (2017)	15%	17	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	0%	28	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

4d. Chichester Urban Centres Opportunity Assessment and Conclusions

Growth Potential

Opportunity

- + **Chichester:** Whilst start-up rates are low, business survival rates in Chichester are high. There has been Council-led attempts to increase start up activity through provision of new flexible and affordable workspace and the Enterprise Centres. Tourism and culture Chichester's largest sector. There is an opportunity to make the most of the city's cultural offering and use this as a catalyst to drive footfall to support the vitality and resilience of the town centre. There is also the potential to strengthen links with the University of Chichester to improve the offering to students and maximise opportunities around the night-time economy.
- + **Selsey:** Selsey's major sector is tourism. Officers noted that the town's population doubles to around 20,000 people in summer months.

Key sites

- + **Chichester:** Southern Gateway – the District Council has already received £5m funding from the LEP to progress this scheme. The council are currently out to procurement for a master developer meaning it is too early to quantify and additional financial support requirements at present. The scheme will deliver:
 - + 12 hectares/30 acres largely brownfield land providing space for 365 homes and 20,000sqm of commercial space
 - + Landscaping and public space enhancements
 - + Improved transport links with emphasis on walking, cycling and public transport
- + **Selsey:** whilst there is no major growth planned for Selsey, the urban centre will accommodate a modest amount of housing over the next planning period

Constraints and challenges

- + **Chichester:** Transport and wider connectivity issues – the A27 was highlighted as a key cause of town centre congestion. Funding had previously been awarded to develop route options but progress has stalled due to resident concerns about north and south routes. A lack of suitable commercial space has been cited as a key issue for local businesses. The historic character of the city means that a significant amount of commercial space is situated in heritage buildings rather than high-end office. Whilst Chichester has historically had a very resilient retail market, vacancy has increased significantly in recent years.
- + **Selsey:** New political administration with many new councillors elected on an anti development manifesto which could limit future growth.

Summary Assessment

Assessment Findings

	Urban Centre	Typology / Score	Rank (of urban centres)
Function Assessment	Chichester	Sub-Regional Economic Hub	n/a
	Selsey	Service Focused Hubs	
Prosperity Assessment	Chichester	183	9 th
	Selsey	186	8 th
Opportunity Assessment	Chichester	21	9 th
	Selsey	13	23 rd
Support Quadrant	Chichester	3	n/a
	Selsey	2	

Assessment Conclusions

- + **Chichester (Tier 3 – regionally significant change opportunity):** Whilst Chichester is prosperous, evidence shows clear early signs of decline which is affecting the prosperity and vitality of the centre. All key sites are progressing without the need for further funding however this could change as major projects (such as Southern Gateway) progress. More focused support could be provided to help the centre to re-establish retail vitality, and strengthen the visitor economy offering. New political make-up of the District Council has brought in a number of new Councillors standing on an anti-development footing (however this is focused more in rural areas rather than the city) which could affect the deliverability of future projects.
- + **Selsey (Limited 'change' potential):** Whilst Selsey benefits from a strong local tourism sector, economic densities are low which limits growth potential and capacity for growth.

Appendix A. Gazetteer of Coast to Capital Urban Centres

5a. Crawley: The Borough at a Glance



95,000 jobs and **72,390** working age residents



Median resident earnings are **£28,116**



House prices are **9.1 times** resident's median earnings



£4,980m total GVA

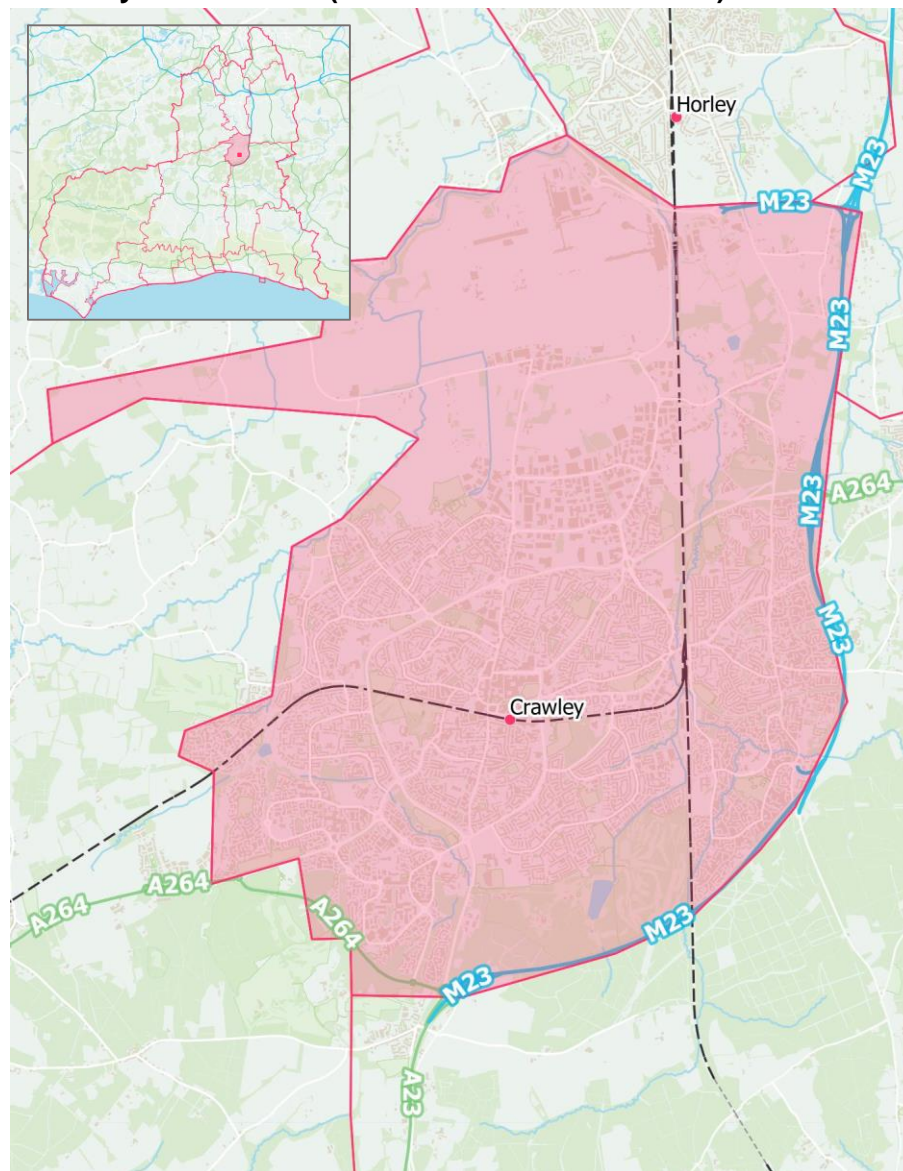
Importance to Coast to Capital:

10% of jobs

6% of working age residents

10% of GVA output

Crawley urban centre (best fit statistical definition)



Appendix A. Gazetteer of Coast to Capital Urban Centres

5b. Crawley Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	68,800	2	596,910	26.4m
Jobs to People Ratio (2017)	0.6	5	0.5	0.3
% Amenity Jobs (2017)	26%	28	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	109,790	2	1.3m	55.6m
Population Growth (2012-17)	3%	19	5%	4%
% LSOAs in the top 50% most deprived (2019)	58%	27	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	48%	27	26%	-
% reporting 'Good' Health (2011)	48%	18	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	10%	6	4%	10%
Town Centre Vacancy (2019)	10.3%	18	-	-
Office Vacancy (2019)	11%	28	-	-
Knowledge Jobs (2017)	17%	15	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	5%	16	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

5c. Crawley Urban Centres Opportunity Assessment and Conclusions

Growth Potential

Opportunity

- + Crawley is one of Coast to Capitals most important urban centres – identified in this research as one of three ‘primary productivity drivers’, alongside Brighton & Hove and Croydon
- + The town arguably has a national importance, reflecting its proximity to Gatwick Airport and the role it places in accommodating employment activities relating to this (both industrial and transport focused, but also financial and professional) – particularly at Manor Royal
- + The town has benefitted from significant regeneration investment in recent years, which has proved highly significant in terms of revitalising the town centre core
- + While the town is currently severely constrained spatially, there are potential opportunities to delivery significant future growth – via the development of safeguarded land at Gatwick Airport, enabling the delivery of a new employment corridor to the north and east of the town and up to the Horley Business Park. Proposals for new communities in the North of Horsham would also effectively act as urban extension to Crawley, further increasing its scale and critical mass.

Key sites

- + In the short term, the council is continuing to prioritise delivery within the town centre – redevelopment of the civic centre is delivering a mixed use scheme including the first new employment space delivered in Crawley in recent years. Further town centre capacity will also be provided by the proposed redevelopment of Overline House.
- + Longer term, the land to the north of the town (safeguarded by Gatwick Airport) offers considerable potential – subject to wider planning by central government on future aviation strategy.

Constraints and challenges

- + The main challenge facing Crawley is spatial – with very limited space to grow within the Borough’s existing boundaries
- + The town also faces significant transport constraints – particularly through Manor Royal and around Gatwick Airport. To deliver the transformational growth opportunities identified (including to the north of the town and in North Horsham) will require significant investment to increase highways capacity – including a new link road to the north of the town
- + There has been a trend of loss of employment space within the town centre in recent years, hence the importance of the current investment in new capacity
- + Town centre vitality has fluctuated in recent years, with the town dominated by larger national multiples. The recent investment in public realm and environment has helped to stabilise this to a certain extent.

Summary Assessment

Assessment Findings

	Urban Centre	Typology / Score	Rank (of urban centres)
Function Assessment	Crawley	Primary Productivity Driver	n/a
Prosperity Assessment	Crawley	187	7 th
Opportunity Assessment	Crawley	27	2 nd
Support Quadrant	Crawley	3	n/a

Assessment Conclusions

- + **Tier 1 – Transformational change opportunity:** Crawley is already at the heart of the Coast to Capital economy – and its proximity to both Gatwick and London, and its strategic links, means that it will continue to play an instrumental role in the future.
- + Proposals for development the north and east of the town are arguably one of the most ‘transformational’ opportunities within the Coast to Capital area – but will require a long term approach, support from central government, and significant infrastructure investment to materialise.
- + Continued collaboration between Crawley, Coast to Capital and neighbouring authorities will play an important role in helping to further define the nature of the opportunity to explore delivery approaches.

Appendix A. Gazetteer of Coast to Capital Urban Centres

6a. Croydon: The Borough at a Glance



124,000 jobs and **248,175** working age residents



Median resident earnings are **£35,876**



House prices are **11.3 times** resident's median earnings



£7,730m total GVA

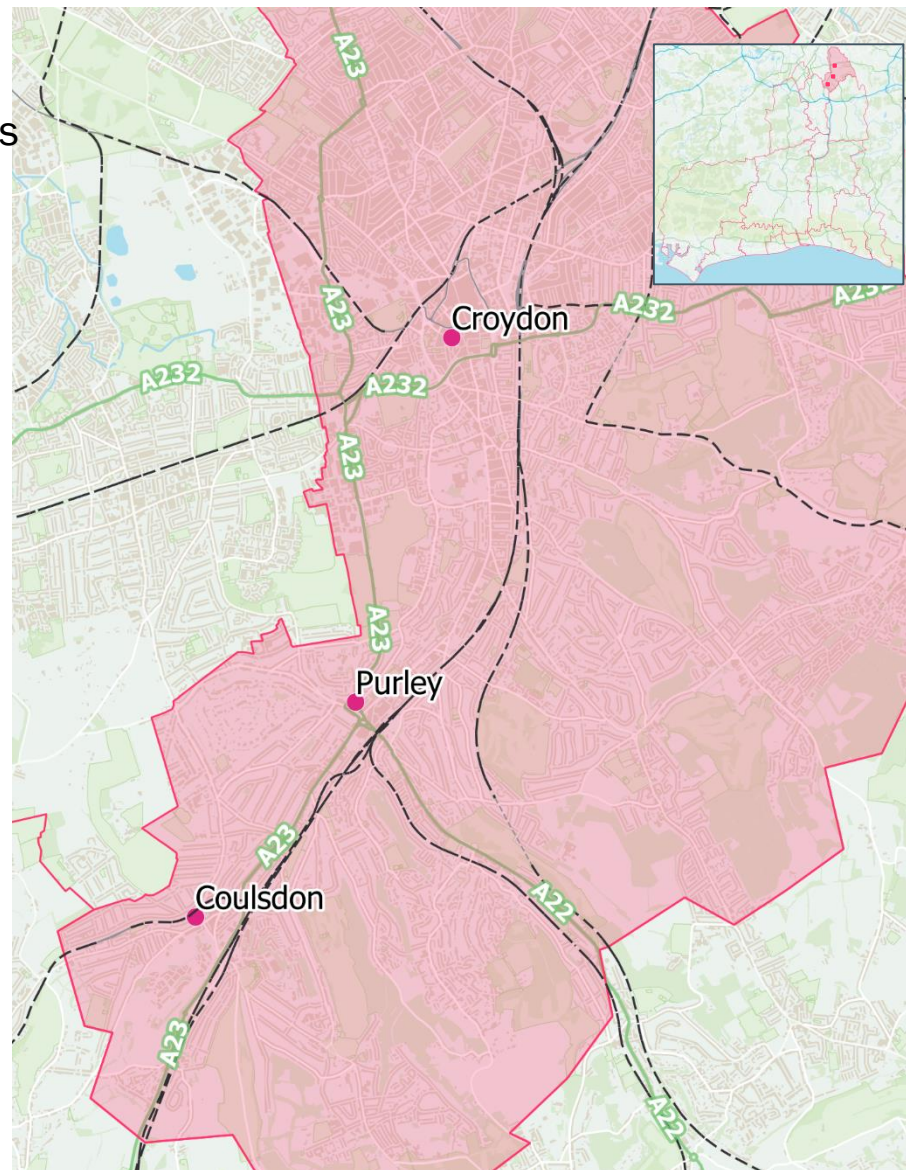
Importance to Coast to Capital:

13% of jobs

20% of working age residents

15% of GVA output

Croydon's urban centres (best fit statistical definition)



Appendix A. Gazetteer of Coast to Capital Urban Centres

6b. Coulsdon Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	5,725	23	596,910	26.4m
Jobs to People Ratio (2017)	0.3	24	0.5	0.3
% Amenity Jobs (2017)	43%	17	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	20,490	21	1.3m	55.6m
Population Growth (2012-17)	3%	20	5%	4%
% LSOAs in the top 50% most deprived (2019)	23%	15	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	46%	26	26%	-
% reporting 'Good' Health (2011)	49%	17	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	14%	4	4%	10%
Town Centre Vacancy (2019)	9.4%	15	-	-
Office Vacancy (2019)	0%	1	-	-
Knowledge Jobs (2017)	21%	10	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	8%	20	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

6c. Croydon Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	46,000	4	596,910	26.4m
Jobs to People Ratio (2017)	1.2	1	0.5	0.3
% Amenity Jobs (2017)	47%	13	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	37,980	10	1.3m	55.6m
Population Growth (2012-17)	17%	1	5%	4%
% LSOAs in the top 50% most deprived (2019)	82%	28	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	100%	29	26%	-
% reporting 'Good' Health (2011)	49%	16	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	3%	20	4%	10%
Town Centre Vacancy (2019)	21.4%	27	-	-
Office Vacancy (2019)	20%	3%	-	-
Knowledge Jobs (2017)	29%	3	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	50%	29	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

6d. Purley Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	8,250	20	596,910	26.4m
Jobs to People Ratio (2017)	0.3	20	0.5	0.3
% Amenity Jobs (2017)	54%	7	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	25,250	16	1.3m	55.6m
Population Growth (2012-17)	3%	23	5%	4%
% LSOAs in the top 50% most deprived (2019)	27%	16	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	93%	28	26%	-
% reporting 'Good' Health (2011)	51%	8	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	17%	3	4%	10%
Town Centre Vacancy (2019)	11.6%	23	-	-
Office Vacancy (2019)	22%	29	-	-
Knowledge Jobs (2017)	19%	13	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	0%	3	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

6e. Croydon Urban Centres Opportunity Assessment and Conclusions

Growth Potential

Opportunity

- + **Croydon:** Significant growth aspirations for the Metropolitan centre including the proposed Westfield development and concentrated housing delivery. Council officers see there to be significant opportunities around cultivating Croydon's night time economy, which aligns closely with the Mayor of London's 24-hour city aspirations. Croydon has strong links with Coast to Capital's anchor institutions – particularly the University of Sussex who have a business hub locally. There is an opportunity to embed this further to ensure that Croydon looks south to Gatwick as well as north to central London.
- + **Coulsdon and Purley:** Plans for wider economic growth and regeneration in Coulsdon and Purley are less developed as much of the recent focus has been on Croydon and the north of the borough.

Key sites

- + **Croydon:** Croydon Metropolitan centre is undergoing significant regeneration. Much of the residential and commercial development outlined within the local plan is concentrated within the defined urban centre. A enhanced Higher Education presence within Croydon Metropolitan centre represents a key part of this vision. This project has strong political support and seeks to address local issues around poor-quality employment. Croydon submitted a bid to the LEP for Local Growth Funding to contribute towards the refurbishment of the proposed site.
- + **Coulsdon and Purley:** No key development sites were identified, however Coulsdon and Purley will need to accommodate housing growth as identified in the local plan.

Constraints and Challenges

- + **Croydon:** The proposed Westfield development has created uncertainty for both the council's future-planning and local traders. The council is already seeing high vacancy rates in the borough and poor-quality retail offer in the metropolitan centre. Although a borough-wide issue, a significant proportion of high quality, low cost workspace has been lost. Between 2013 and 2018, 215,177sqm of office space was lost due to Permitted Development Rights.
- + **Coulsdon and Purley:** Croydon borough as a whole is very pro-growth, with most of this growth being captured within the key urban centres. Despite this, officers noted that south Croydon tends to be characterised by greater concerns about the scale of growth (especially housing). Officers reported a lack of political support for growth in the south of the borough. As a result, there is currently very little focus from on these centres from the council's regeneration and economic development teams.

Summary Assessment

Assessment Findings

	Urban Centre	Typology / Score	Rank (of urban centres)
Function Assessment	Croydon	Primary Productivity Driver	n/a
	Coulsdon	Service Focused Hub	
	Purley	Service Focused Hub	
Prosperity Assessment	Croydon	204	2 nd
	Coulsdon	172	10 th
	Purley	156	15 th
Opportunity Assessment	Croydon	30	1 st
	Coulsdon	15	15 th
	Purley	15	15 th
Support Quadrant	Croydon	3	n/a
	Coulsdon	2	
	Purley	1	

Assessment Conclusions

- + **Croydon (Tier 2: nationally significant change opportunity):** Croydon scores highly both in terms of 'need' and 'opportunity'. The urban centre faces a range of challenges such as poor air quality and concentrated pockets of extreme deprivation. Despite this, Croydon Metropolitan centre represents one of the region's key growth opportunities. The scale of housing and commercial growth being delivered through increased densification means that the centre will continue to be one of the region's key productivity drivers.
- + **Coulsdon and Purley (limited 'change' potential):** Although these are a relatively affluent centres, affordability is one of the key challenges, with housing affordability affecting the prosperity of the centres. Due to the focus on the north of the borough and Croydon Metropolitan centre, there is limited growth opportunity within both Coulsdon and Purley.

Appendix A. Gazetteer of Coast to Capital Urban Centres

7a. Epsom and Ewell: The Borough at a Glance



30,300 jobs and **48,805** working age residents



Median resident earnings are **£36,039**



House prices are **13.1 times** resident's median earnings



£1,990m total GVA

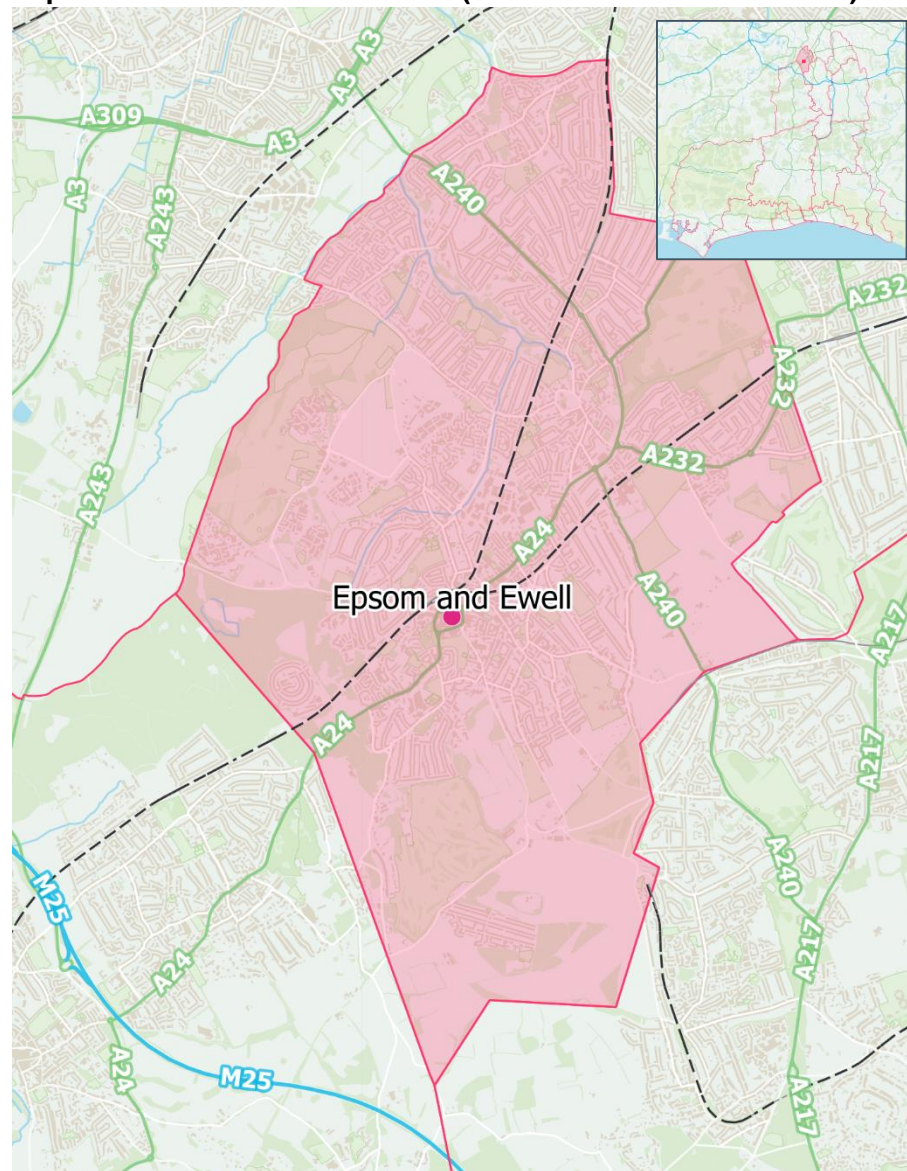
Importance to Coast to Capital:

3% of jobs

4% of working age residents

2% of GVA output

Epsom and Ewell urban centre (best fit statistical definition)



Appendix A. Gazetteer of Coast to Capital Urban Centres

7b. Epsom and Ewell Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	30,290	6	596,910	26.4m
Jobs to People Ratio (2017)	0.4	16	0.5	0.3
% Amenity Jobs (2017)	49%	12	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	79,000	4	1.3m	55.6m
Population Growth (2012-17)	5%	11	5%	4%
% LSOAs in the top 50% most deprived (2019)	7%	8	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	16%	11	26%	-
% reporting 'Good' Health (2011)	52%	4	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	-1%	22	4%	10%
Town Centre Vacancy (2019)	13.2%	24	-	-
Office Vacancy (2019)	9%	27	-	-
Knowledge Jobs (2017)	21%	11	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	0%	11	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

7c. Epsom and Ewell Urban Centres Opportunity Assessment and Conclusions

Growth Potential

Opportunity

- + The council is exploring a new approach to unlocking higher levels of growth across its urban via a ‘Transformation Masterplan’. Local members recognise that housing growth is inevitable and therefore the masterplan seeks to give the council the control to be able to shape growth. The council anticipate that this approach will ensure that population increases are accompanied with wider investment in the requisite sustainable transport enhancements.
- + This represents a response to the borough’s high housing demand which equates to 10,000+ units (or an additional 25,000 people). The masterplan will set out the council’s approach to delivering housing in a different way. Key to this is infrastructure investment and high-quality design, which will help to deliver housing targets, sustainable communities and minimise resistance to growth.
- + A key part of the masterplan will be to embed behavioural change in terms of reducing car reliance. Council offers believe that this approach to planning and approach has longevity and represents a long-term approach to driving sustainable growth.

Key sites

- + Sites will be identified through the transformation masterplan.

Constraints and Challenges

Railway stations are critical to accommodating future growth within the borough. Crossrail 2 is important to the borough’s future growth ambitions. Without Crossrail, officers believed that ambitions could be delivered but will require highway accessibility enhancements.

Historically Epsom has enjoyed a low retail vacancy rate, however this is shifting as national multiples cease trading (such as Maplin Electronics or the potential closure of House of Fraser).

Summary Assessment

Assessment Findings

	Urban Centre	Typology / Score	Rank (of urban centres)
Function Assessment	Epsom & Ewell	Sub Regional Economic Hub	n/a
Prosperity Assessment	Epsom & Ewell	152	16 th
Opportunity Assessment	Epsom & Ewell	22	7 th
Support Quadrant	Epsom & Ewell	4	n/a

Assessment Conclusions

- + **Tier 2: nationally significant change opportunity:** Whilst the borough does not suffer from the same levels of economic deprivation as other parts of the Coast to Capital area, there is a need to retain the area’s competitive edge and make the borough an attractive location for investment to realise the growth opportunity. The council have a strong green focus looking at ways of incorporating green growth and biodiversity gain into planning policy. These plans could provide a strong hook for the industrial strategy with clear links to the future of mobility and clean growth.

Appendix A. Gazetteer of Coast to Capital Urban Centres

8a. Horsham: The District at a Glance



55,000 jobs and **83,504** working age residents



Median resident earnings are **£34,185**



House prices are **14 times** resident's median earnings



£3,570m total GVA

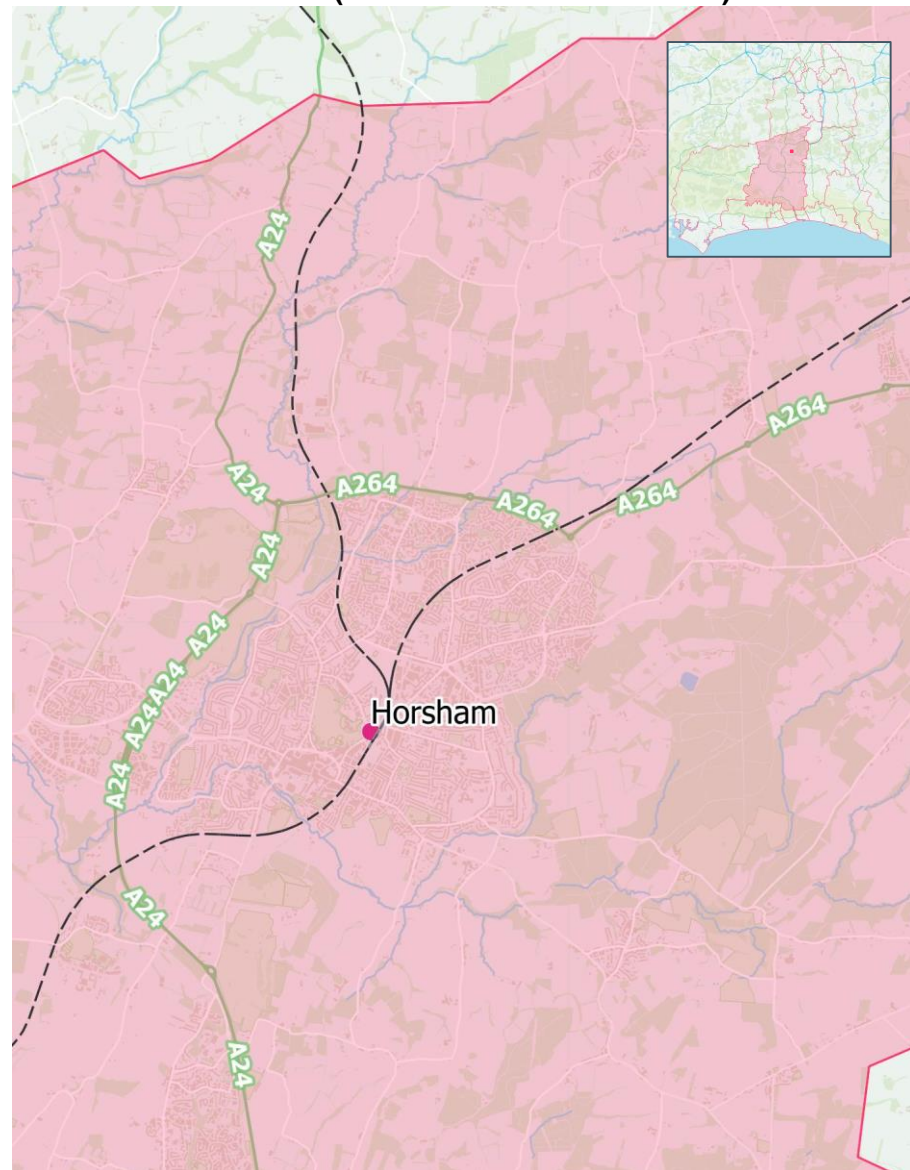
Importance to Coast to Capital:

6% of jobs

7% of working age residents

7% of GVA output

Horsham urban centre (best fit statistical definition)



Appendix A. Gazetteer of Coast to Capital Urban Centres

8b. Horsham Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	23,525	9	596,910	26.4m
Jobs to People Ratio (2017)	0.4	13	0.5	0.3
% Amenity Jobs (2017)	41%	19	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	54,570	7	1.3m	55.6m
Population Growth (2012-17)	8%	4	5%	4%
% LSOAs in the top 50% most deprived (2019)	6%	7	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	19%	15	26%	-
% reporting 'Good' Health (2011)	50%	10	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	5%	17	4%	10%
Town Centre Vacancy (2019)	9.5%	16	-	-
Office Vacancy (2019)	1%	13	-	-
Knowledge Jobs (2017)	23%	8	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	0%	8	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

8c. Horsham Urban Centres Opportunity Assessment and Conclusions

Growth Potential

Opportunity

- + Officers noted that the council has a strong growth vision with more capacity for growth than most other districts within the LEP area, with a vision centred around placemaking and high quality of life. Horsham's members are pro-growth and are looking at ways for the district to deliver the government's housing targets whilst maintaining a high quality living environment and aiming for net biodiversity gain.
- + There is already significant momentum and confidence in Horsham as a business destination. Corporate headquarters are being relocated to the town, bringing a significant quantum of high value employment, citing a need to respond to employee demand for a high-quality living environment.

Key sites

- + Horsham West urban extension – development of over 2,000 homes and accompanying community facilities.
- + Land north of Horsham – Horsham District Council granted outline planning permission for up to 2,750 dwellings, a business park (up to 46,450 sqm), and accompanying community facilities.
- + Novartis Site - The land at the former pharmaceutical research development and manufacturing site is 7.5 hectares. This site offers employment opportunities, and is strategically located in close proximity to Horsham railway station, major roads (A24 and A264) and Gatwick Airport.
- + Land west of Ifield* – although in Horsham district, this scheme is covered within the Crawley urban centre review.

Constraints and Challenges

- + Officers noted that strategic transport infrastructure is currently the major barrier to delivering growth ambitions. In terms of developing the site at North of Horsham, a key priority is the early provision of the new A264 Rusper Road roundabout and roundabout North of A264 Rusper Road, as well as the new signalised junction midway between A264 Rusper Road and Moorhead Road roundabout. This also includes the Legal and General site to the North of Horsham. Without the delivery of Horsham Parkway station, it is likely to limit the capacity of the site, the speed of delivery and the quality of businesses and jobs locating on site.
- + Businesses in the urban centre have reported a lack of appropriate grow-on space. Whilst some space has been lost to permitted development, officers noted that this has predominantly been in low quality office space.

Summary Assessment

Assessment Findings

	Urban Centre	Typology / Score	Rank (of urban centres)
Function Assessment	Horsham	Sub Regional Economic Hub	n/a
Prosperity Assessment	Horsham	119	26 th
Opportunity Assessment	Horsham	23	5 th
Support Quadrant	Horsham	4	n/a

Assessment Conclusions

- + **Tier 3 - Regionally significant change opportunity:** There is already significant momentum behind Horsham urban centre with proposals for growth through major urban extensions and inward investment. There is an opportunity to embed this momentum to realise the council's vision for clean growth through strategic infrastructure which will accelerate delivery and ensure development sites deliver potential capacities.

Appendix A. Gazetteer of Coast to Capital Urban Centres

9a. Lewes: The District at a Glance



35,000 jobs and **58,779** working age residents



Median resident earnings are **£28,502**



House prices are **9.9 times** resident's median earnings



£2,050m total GVA

Importance to Coast to Capital:

4% of jobs

5% of working age residents

4% of GVA output

Lewis's urban centres (best fit statistical definition)



Appendix A. Gazetteer of Coast to Capital Urban Centres

9b. Lewes Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	12,355	14	596,910	26.4m
Jobs to People Ratio (2017)	0.7	3	0.5	0.3
% Amenity Jobs (2017)	59%	2	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	17,880	24	1.3m	55.6m
Population Growth (2012-17)	2%	25	5%	4%
% LSOAs in the top 50% most deprived (2019)	9%	9	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	27%	19	26%	-
% reporting 'Good' Health (2011)	49%	14	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	8%	12	4%	10%
Town Centre Vacancy (2019)	15.9%	25	-	-
Office Vacancy (2019)	7%	24	-	-
Knowledge Jobs (2017)	11%	24	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	0%	6	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

9c. Newhaven Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	5,700	24	596,910	26.4m
Jobs to People Ratio (2017)	0.4	12	0.5	0.3
% Amenity Jobs (2017)	35%	23	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	12,980	26	1.3m	55.6m
Population Growth (2012-17)	5%	12	5%	4%
% LSOAs in the top 50% most deprived (2019)	88%	29	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	38%	24	26%	-
% reporting 'Good' Health (2011)	43%	23	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	18%	2	4%	10%
Town Centre Vacancy (2019)	19%	26	-	-
Office Vacancy (2019)	2%	15	-	-
Knowledge Jobs (2017)	9%	27	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	13%	23	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

9d. Peacehaven Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	2,825	28	596,910	26.4m
Jobs to People Ratio (2017)	0.2	29	0.5	0.3
% Amenity Jobs (2017)	53%	8	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	18,580	23	1.3m	55.6m
Population Growth (2012-17)	5%	9	5%	4%
% LSOAs in the top 50% most deprived (2019)	55%	26	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	36%	23	26%	-
% reporting 'Good' Health (2011)	41%	25	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	5%	18	4%	10%
Town Centre Vacancy (2019)	10.6%	19	-	-
Office Vacancy (2019)	0%	1	-	-
Knowledge Jobs (2017)	12%	22	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	0%	4	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

9e. Seaford Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	4,975	25	596,910	26.4m
Jobs to People Ratio (2017)	0.2	28	0.5	0.3
% Amenity Jobs (2017)	57%	3	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	24,500	18	1.3m	55.6m
Population Growth (2012-17)	4%	16	5%	4%
% LSOAs in the top 50% most deprived (2019)	20%	14	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	40%	25	26%	-
% reporting 'Good' Health (2011)	40%	27	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	8%	11	4%	10%
Town Centre Vacancy (2019)	5.1%	4	-	-
Office Vacancy (2019)	0%	1	-	-
Knowledge Jobs (2017)	11%	25	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	0%	2	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

9f. Lewes Urban Centres Opportunity Assessment and Conclusions

Growth Potential

Opportunity

- + **Lewes:** Scale-up potential companies in Lewes (e.g. John Florence Limited - Children's Orthotics). The business currently employ 27 people and plans to grow to 120 people.
- + **Seaford:** Lots of day visitors who park for free to access the beach but this does not result in increased town centre footfall. The centre is currently well served by public transport and the centre benefits from strong bus links.
- + **Newhaven:** Newhaven has the only Enterprise Zone in the LEP area. Over the lifetime of the EZ, 55,000sqm of new commercial space will be developed with an additional 15,000sqm refurbished to create and sustain around 2,000 jobs. Newhaven has the highest levels of housing growth in the local plan. There is also strong political support for the regeneration of the urban centre.
- + **Peacehaven:** Potential to deliver more retail space, but growth is constrained by infrastructure, available space and local resident concerns. Whilst the regeneration team are still to understand the strategic priorities of the new political administration, there is likely to be more focus on delivering sustainable, inclusive coastal communities.

Key sites

- + **Lewes:** Lewes College – looking at existing estates within the district (estate management strategy) Currently early days but there could be an opportunity to deliver employment space. North Street Quarter - largest project of its type in a national park. Finally coming forward after being in the pipeline for 15 years. Developer should be on site by spring 2020. 40% affordable > important based on the cost of housing
- + **Newhaven:** a number of town centre projects are being brought forward as part of the Future High Streets Fund business case.

Challenges and Constraints

- + **Lewes:** Residential values are higher than anywhere else in the District, driving more commercial to residential conversions and the National Park is exploring Article 4 interventions to address this issue. Officers believed that there is a danger that Lewes will become even more of a dormitory town to Brighton and London. The council believe that capital funding is required to unlock sites for commercial development to re-balance existing residential premium.#
- + **Newhaven:** Viability is a key issue for developers to deliver housing due to low land values. Coast to Capital have provided LGF funding in the past to enhance viability. Transport infrastructure is a key constraint of EZ growth. Road and rail links are and will be put under increased pressure by the growth planned for the town.

Summary Assessment

Assessment Findings

	Urban Centre	Typology / Score	Rank (of urban centres)
Function Assessment	Lewes	Service Focused Hubs	n/a
	Seaford	Service Focused Hubs	
	Newhaven	Service Focused Hubs	
	Peacehaven	Service Focused Hubs	
Prosperity Assessment	Lewes	151	17 th
	Seaford	166	13 th
	Newhaven	189	5 th
	Peacehaven	191	4 th
Opportunity Assessment	Lewes	15	15 th
	Seaford	10	27 th
	Newhaven	23	5 th
	Peacehaven	10	27 th
Support Quadrant	Lewes	1	n/a
	Seaford	2	
	Newhaven	3	
	Peacehaven	2	

Assessment Conclusions

- + **Lewes (locally significant change potential):** Lewes is a relatively prosperous urban centre which is heavily constrained by the National Park. High residential values have put increased pressure on commercial space in the centre, meaning that capacity for growth is limited.
- + **Newhaven (Tier 3 – regionally significant change opportunity):** Newhaven represents a regionally-significant opportunity. The centre suffers from high levels of economic and social deprivation which is especially acute in terms of town centre vitality. Despite this, there are significant opportunities for commercial and residential growth which will fundamentally reshape the town and provide increased opportunities for local residents.
- + **Peacehaven (limited change potential):** Peacehaven is a residential centre characterised by low economic densities. Until strategic transport issues are addressed, local appetite and capacity for growth is limited.
- + **Seaford (limited change potential):** Seaford is a residential centre with pockets of deeply entrenched social deprivation. Whilst there may be potential to harness tourism more effectively, there is unlikely to be demand for transformational growth opportunities with interventions focused on increasing town centre footfall.

*Note: East Saltdean and Telscombe are grouped together by the District Council to be considered one of Lewes' five urban centres. However, even when grouped the population is under 10,000 so have been excluded for this assessment

Appendix A. Gazetteer of Coast to Capital Urban Centres

10a. Mid Sussex: The District at a Glance



60,000 jobs and 89,336 working age residents



Median resident earnings are £36,042



House prices are 12.7 times resident's median earnings



£3,620m total GVA

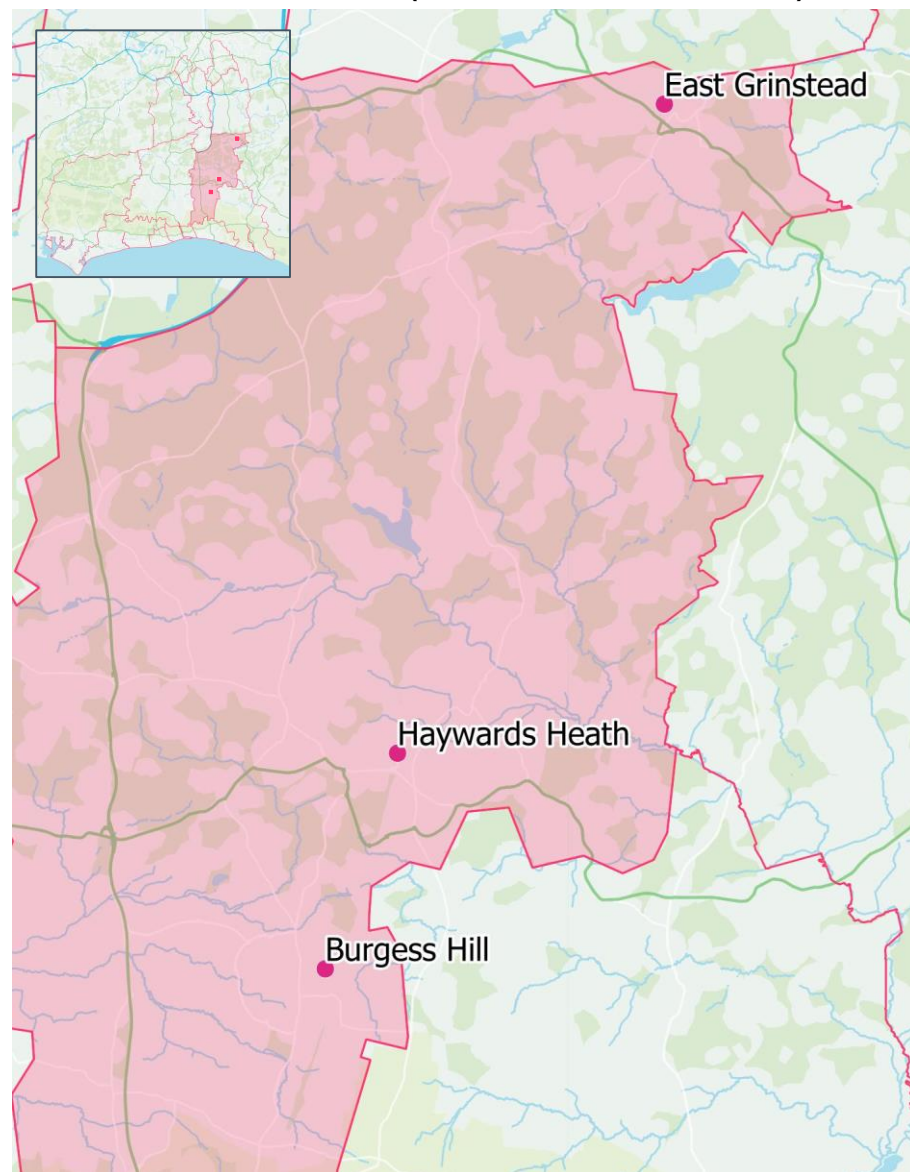
Importance to Coast to Capital:

6% of jobs

7% of working age residents

7% of GVA output

Mid Sussex's urban centres (best fit statistical definition)



Appendix A. Gazetteer of Coast to Capital Urban Centres

10b. Burgess Hill Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	15,425	12	596,910	26.4m
Jobs to People Ratio (2017)	0.5	8	0.5	0.3
% Amenity Jobs (2017)	31%	26	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	31,160	14	1.3m	55.6m
Population Growth (2012-17)	3%	24	5%	4%
% LSOAs in the top 50% most deprived (2019)	5%	6	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	11%	7	26%	-
% reporting 'Good' Health (2011)	50%	9	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	7%	13	4%	10%
Town Centre Vacancy (2019)	11%	20	-	-
Office Vacancy (2019)	1%	9	-	-
Knowledge Jobs (2017)	29%	4	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	0%	13	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

10c. East Grinstead Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	10,725	16	596,910	26.4m
Jobs to People Ratio (2017)	0.5	10	0.5	0.3
% Amenity Jobs (2017)	47%	14	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	23,030	20	1.3m	55.6m
Population Growth (2012-17)	3%	18	5%	4%
% LSOAs in the top 50% most deprived (2019)	15%	13	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	15%	10	26%	-
% reporting 'Good' Health (2011)	50%	11	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	-5%	24	4%	10%
Town Centre Vacancy (2019)	4.7%	3	-	-
Office Vacancy (2019)	2%	14	-	-
Knowledge Jobs (2017)	19%	12	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	8%	19	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

10d. Haywards Heath Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	14,075	13	596,910	26.4m
Jobs to People Ratio (2017)	0.4	15	0.5	0.3
% Amenity Jobs (2017)	50%	10	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	36,100	12	1.3m	55.6m
Population Growth (2012-17)	9%	3	5%	4%
% LSOAs in the top 50% most deprived (2019)	5%	5	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	20%	16	26%	-
% reporting 'Good' Health (2011)	52%	3	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	-12%	27	4%	10%
Town Centre Vacancy (2019)	4.3%	2	-	-
Office Vacancy (2019)	2%	16	-	-
Knowledge Jobs (2017)	22%	9	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	0%	10	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

10e. Mid Sussex Urban Centres Opportunity Assessment and Conclusions

Growth Potential

Opportunity

- Burgess Hill:** Burgess Hill contains a number of significant growth proposals centered on the Northern Arc growth area, Science and Technology Park and town centre rejuvenation. Officers reported that politicians and local residents are supportive of growth if it is accompanied by appropriate transport and community infrastructure. Officer reported strong private investment confidence as demonstrated through the financing of the town centre regeneration opportunity. Officers articulated a vision to develop a high value knowledge-based/life science economy in Burgess Hill and provide the jobs and commercial space which meet the population growth projections for the District.
- Haywards Heath:** Haywards Heath has a forthcoming masterplan which will seek to optimize council assets in the town. The town also has an active Business Improvement District which is seen by Mid Sussex as a key vehicle for delivering the recommendations of the masterplan.
- East Grinstead:** Investment in the station in recent years improves image and 3 industrial estates – however officers noted that these are small in scale.

Key sites

- Burgess Hill:** The Northern Arc growth area will provide 3,500 homes plus regeneration focus on several sites within the town. This is matched by large-scale development proposals for the town centre with a focus on delivering commercial space with larger footprint to meet the demands of national multiples. Science and Technology Park to the north west of the town could deliver up to 100,000sqm workspace. This will focus on STEM and could include incubation facilities.
- Haywards Heath:** Officers noted that there are likely to be several council-owned assets which can be optimised as part of the masterplanning process. This is also likely to focus on Perrymount Road, which has been identified as a key site for commercial intensification in the District Plan.
- East Grinstead:** No major developments currently identified.

Constraints and Challenges

- Burgess Hill:** Officers conceded that the town centre is currently physically run-down, reinforcing the importance of regeneration proposals. Local engagement with business suggests that the district currently lacks grow-on workspace which is limiting scale-up potential. Local businesses have also highlighted the tenure of commercial space as an issue (with many wanting freehold space rather than leasehold). Mid Sussex reported that they are likely to require funding or lobbying support to encourage Highways England to include A2300 Science Park improvements within their RIS 2. Connectivity (by road) is currently restricting amount of space which can be delivered at the Science and Technology Park.
- Haywards Heath:** The town masterplan is likely to identify interventions around improving transport infrastructure, traffic calming measures and new leisure facilities. Officers noted the need to ensure that the transport provides appropriate connectivity with the district's key employment locations.
- East Grinstead:** Needs significant highways improvements to unlock housing growth. Generally, transport infrastructure needs significant upgrades in order to absorb new growth. Officers also noted that the centre's historic core and limited appetite for growth compared with Haywards Heath and Burgess Hill is likely to limit growth in East Grinstead. The town is also surrounded by green belt (AONB and South Downs) which restricts development.

Summary Assessment

Assessment Findings

	Urban Centre	Typology / Score	Rank (of urban centres)
Function Assessment	Burgess Hill	Sub-regional economic hubs	n/a
	Haywards Heath	Sub-regional economic hubs	
	East Grinstead	Service Focused Hubs	
Prosperity Assessment	Burgess Hill	110	27 th
	Haywards Heath	107	29 th
	East Grinstead	138	19 th
Opportunity Assessment	Burgess Hill	25	3 rd
	Haywards Heath	15	15 th
	East Grinstead	14	19 th
Support Quadrant	Burgess Hill	4	n/a
	Haywards Heath	1	
	East Grinstead	1	

Assessment Conclusions

- Burgess Hill (Tier 3 – regionally significant change opportunity):** Burgess Hill is an important urban centre which comprises a significant amount of the region's high value employment. Whilst need is relatively low, the housing and commercial growth planned for the town could be important for bringing more high value employment to the region.
- Haywards Heath (locally significant change potential):** Haywards Heath is one of Coast to Capital's more prosperous urban centres with low social and economic deprivation. Whilst Burgess Hill has been the primary regeneration focus for Mid Sussex in recent years, there is likely to be increased focus on the potential of Haywards Heath. However, until the masterplan has been developed, the scale of the growth opportunity is limited.
- East Grinstead (limited change potential):** Whilst East Grinstead is a relatively affluent area, the employment base has shrunk in recent years. Strategic transport infrastructure and green belt constraints mean that the growth opportunity is yet to be articulated and wider appetite for growth is uncertain.

Appendix A. Gazetteer of Coast to Capital Urban Centres

11a. Mole Valley: The District at a Glance



45,000 jobs and **51,514** working age residents



Median resident earnings are **£30,763**



House prices are **14.9 times** resident's median earnings



£3,500m total GVA

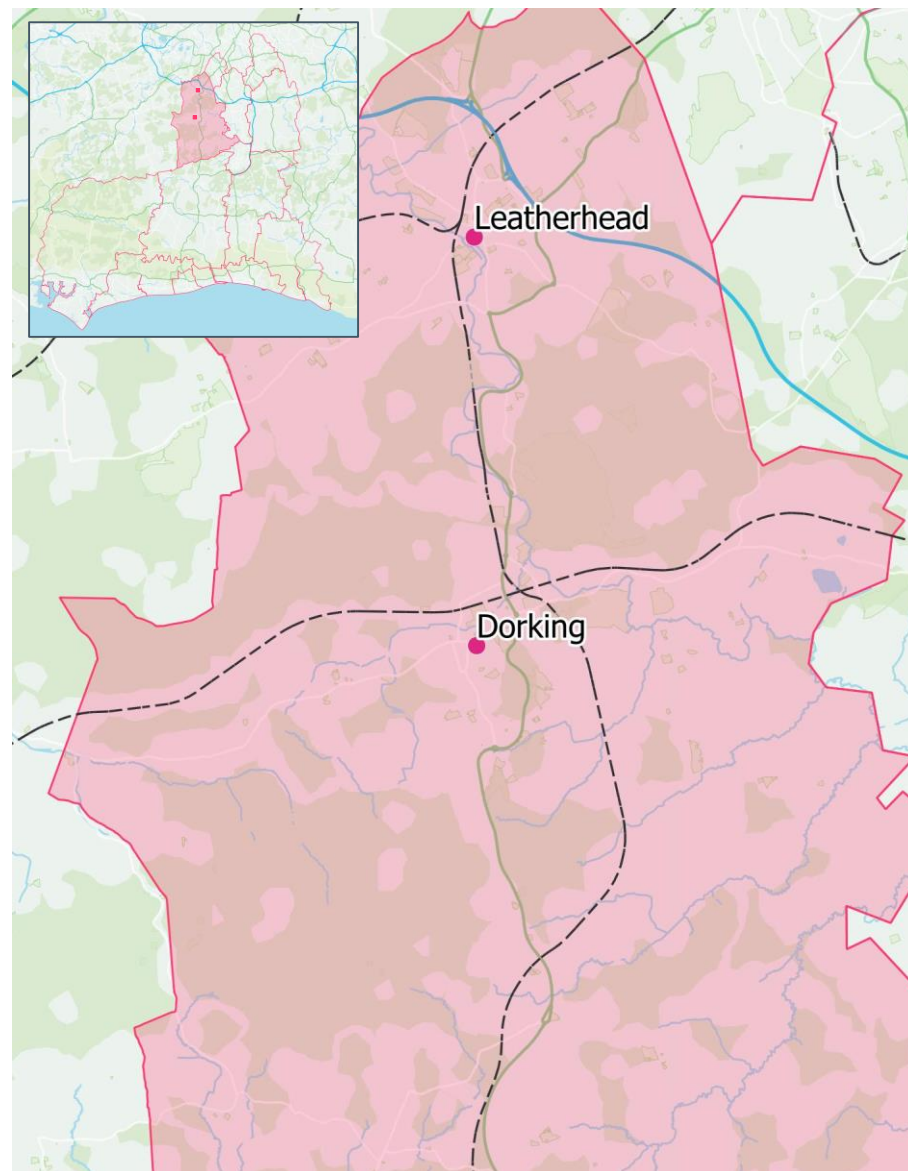
Importance to Coast to Capital:

5% of jobs

4% of working age residents

7% of GVA output

Mole Valleys urban centres (best fit statistical definition)



Appendix A. Gazetteer of Coast to Capital Urban Centres

11b. Dorking Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	10,450	17	596,910	26.4m
Jobs to People Ratio (2017)	0.6	4	0.5	0.3
% Amenity Jobs (2017)	37%	21	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	16,480	25	1.3m	55.6m
Population Growth (2012-17)	3%	20	5%	4%
% LSOAs in the top 50% most deprived (2019)	10%	10	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	10%	6	26%	-
% reporting 'Good' Health (2011)	52%	5	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	10%	8	4%	10%
Town Centre Vacancy (2019)	9.7%	17	-	-
Office Vacancy (2019)	3%	19	-	-
Knowledge Jobs (2017)	25%	5	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	10%	22	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

11c. Leatherhead Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	26,150	8	596,910	26.4m
Jobs to People Ratio (2017)	0.6	7	0.5	0.3
% Amenity Jobs (2017)	59%	2	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	17,880	24	1.3m	55.6m
Population Growth (2012-17)	2%	25	5%	4%
% LSOAs in the top 50% most deprived (2019)	3%	4	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	7%	5	26%	-
% reporting 'Good' Health (2011)	49%	14	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	-8%	26	4%	10%
Town Centre Vacancy (2019)	8%	10	-	-
Office Vacancy (2019)	8%	25	-	-
Knowledge Jobs (2017)	37%	0	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	0%	7	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

11d. Mole Valley Urban Centres Opportunity Assessment and Conclusions

Growth Potential

Opportunity

- + **Dorking:** Mole Valley officers believed that there is a potential for Dorking to build a stronger visitor economy offer due to proximity to regional attractions such as Box Hill. There are also a number of high potential employers who the council believe to have high growth potential (such as Johnsons Sweepers).
- + **Leatherhead:** Many knowledge economy jobs are hosted in the Urban Centre and Leatherhead contains many high value, knowledge intensive employers such as Chobham Aerospace Connectivity. Surrey Police consolidating presence in Leatherhead which will see 800 officers and staff locate in the town.

Key sites

- + Mole Valley District Council is in the process of developing its local plan, therefore it is too early to understand the full extent of growth capacity and ambition in either Dorking and Leatherhead at this stage. Despite this, opportunities were identified at the following sites:
- + **Dorking:** Pippbrook House – the designated heritage site and former library needs substantial investment to bring it back into working order. Although plans at a early stage, it is envisaged that it will involve a mix of business and community use. Early market testing indicates demand.
- + **Leatherhead:** As part of the Transform Leatherhead strategy the following interventions have been identified:
 - + Bull Hill – 300-450 home development in the town centre being brought forward privately. This is seen as vital for driving increased footfall in the town centre.
 - + Town congestion – feasibility work undertaken to address town centre congestion exacerbated by Leatherhead's proximity of the A243 and M25.

Constraints and Challenges

- + **Dorking:** Vacancy rates along the high street fluctuate significantly. Officers reported that there is too much retail space in Dorking and the retail offer is limited in terms of diversity which doesn't cater for modern shopping habits. High costs of housing is putting off many businesses from locating within the district. Dorking has a historic road network which makes the expansion of the town difficult. Due to Mole Valley being a green belt authority, there is a restriction on growth of all types (but particularly housing). However, officers conceded that a mix of brownfield intensification and green belt release are likely to be required to meet the government's housing targets. Brownfield intensification likely to take place in the urban centres, however green belt release is seen as a red line for many members as the environmental quality of the district seen as a top priority.
- + **Leatherhead:** Leatherhead's economy is mainly comprised of office jobs and the office market struggled badly following the recession. However, the business base is recovering, and the business base is diversifying. Officers noted that lots of industrial space is turning to residential in Leatherhead (partly due to PDR). However, officers believed that there is still a significant amount of vacant commercial space within the centre (350,000sqft+) which can be harnessed to accommodate future growth. Council engagement with business has reported issues with recruitment and retention of staff (partly linked to housing costs, and this is reflected within the Mole Valley HEDNA).

Summary Assessment

Assessment Findings

	Urban Centre	Typology / Score	Rank (of urban centres)
Function Assessment	Dorking	Sub-regional economic hubs	n/a
	Leatherhead	Sub-regional economic hubs	
Prosperity Assessment	Dorking	131	22 nd
	Leatherhead	127	24 th
Opportunity Assessment	Dorking	11	26 th
	Leatherhead	14	19 th
Support Quadrant	Dorking	1	n/a
	Leatherhead	1	n/a

Assessment Conclusions

- + **Dorking (locally significant change potential):** Dorking is a prosperous urban centre which comprises a large amount of high value employment. Despite this, green belt constraints and the status of local plan development means that the growth opportunity in Dorking is yet to be fully articulated.
- + **Leatherhead (locally significant change potential):** Leatherhead is a prosperous urban centre which contains a significant proportion of Coast to Capital's knowledge economy employment. Whilst a growth vision has been articulated through the Transform Leatherhead strategy, the focus for Leatherhead is currently centred on maintaining vitality and addressing large commercial vacancies.

Appendix A. Gazetteer of Coast to Capital Urban Centres

12a. Reigate and Banstead: The Borough at a Glance



65,000 jobs and **90,043** working age residents



Median resident earnings are **£37,523**



House prices are **12.5 times** resident's median earnings



£4,300m total GVA

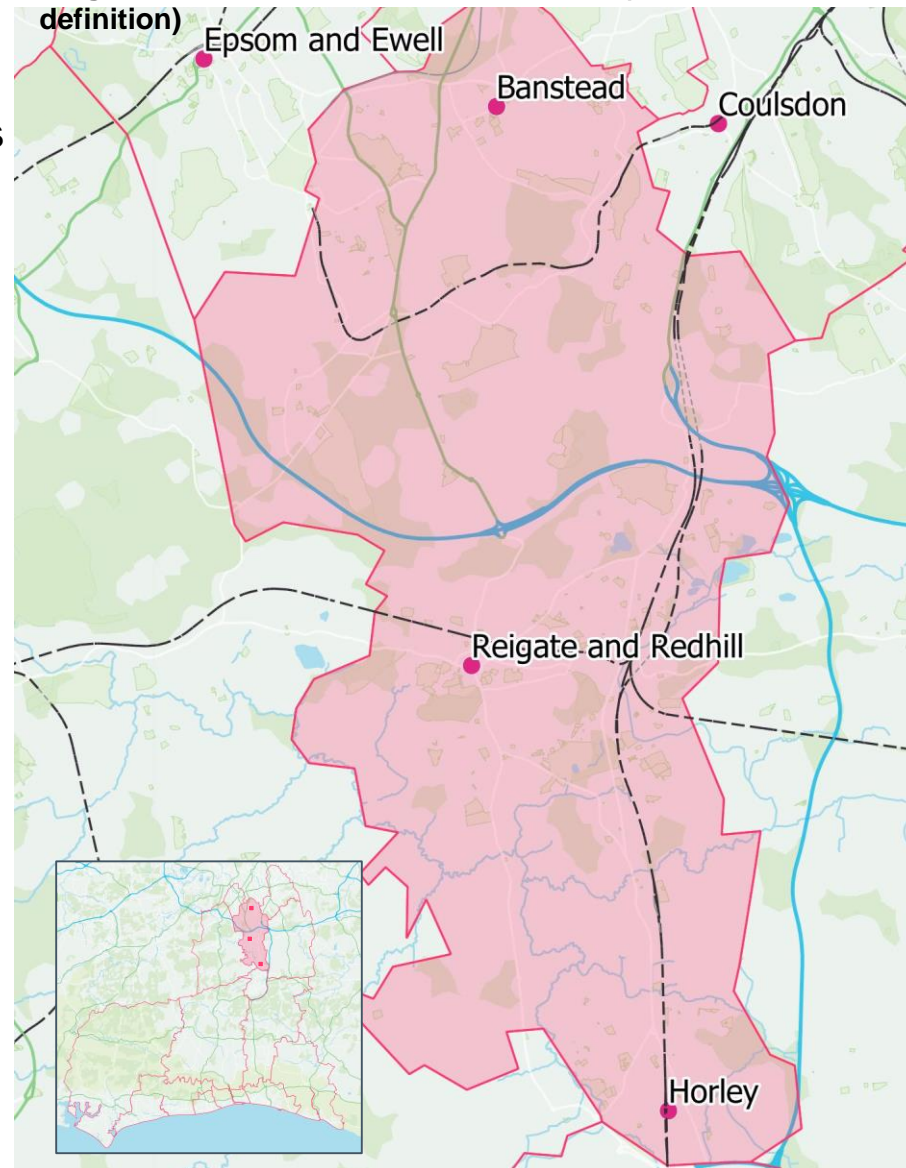
Importance to Coast to Capital:

7% of jobs

7% of working age residents

8% of GVA output

Reigate & Banstead's urban centres (best fit statistical definition)



Appendix A. Gazetteer of Coast to Capital Urban Centres

12b. Reigate and Redhill Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	31,050	5	596,910	26.4m
Jobs to People Ratio (2017)	0.6	6	0.5	0.3
% Amenity Jobs (2017)	35%	24	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	50,210	8	1.3m	55.6m
Population Growth (2012-17)	6%	8	5%	4%
% LSOAs in the top 50% most deprived (2019)	11%	11	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	14%	9	26%	-
% reporting 'Good' Health (2011)	54%	1	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	8%	10	4%	10%
Town Centre Vacancy (2019)	9%	13	-	-
Office Vacancy (2019)	6%	23	-	-
Knowledge Jobs (2017)	33%	2	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	4%	15	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

12c. Banstead Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	10,350	18	596,910	26.4m
Jobs to People Ratio (2017)	0.3	25	0.5	0.3
% Amenity Jobs (2017)	55%	4	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	37,670	11	1.3m	55.6m
Population Growth (2012-17)	3%	21	5%	4%
% LSOAs in the top 50% most deprived (2019)	13%	12	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	29%	20	26%	-
% reporting 'Good' Health (2011)	49%	12	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	-21%	29	4%	10%
Town Centre Vacancy (2019)	7.1%	6	-	-
Office Vacancy (2019)	0%	1	-	-
Knowledge Jobs (2017)	16%	16	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	0%	14	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

12d. Horley Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	6,975	22	596,910	26.4m
Jobs to People Ratio (2017)	0.3	22	0.5	0.3
% Amenity Jobs (2017)	36%	22	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	24,580	17	1.3m	55.6m
Population Growth (2012-17)	10%	2	5%	4%
% LSOAs in the top 50% most deprived (2019)	21%	15	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	21%	18	26%	-
% reporting 'Good' Health (2011)	49%	15	35%	34%

Economic Opportunity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	11%	5	4%	10%
Town Centre Vacancy (2019)	7.9%	9	-	-
Office Vacancy (2019)	0%	1	-	-
Knowledge Jobs (2017)	14%	19	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	0%	1	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

12e. Reigate and Banstead Urban Centres Opportunity Assessment and Conclusions

Growth Potential

Opportunity

- + **Reigate and Redhill:** Redhill has been the focus of council investment in recent years, with investment in the public realm and town centre environment. Whilst grouped with Reigate for this assessment, officers noted that there is much greater capacity and potential for growth than Reigate.
- + **Banstead:** Limited growth opportunity identified at present.
- + **Horley:** Horley has a rapidly growing local population. The Council have invested significantly in the town (predominantly leisure facilities and public realm enhancements). Whilst the council has significant land holdings in the town (predominantly car parks), there is no clear plan/strategy for how to best utilize these assets at present.

Key sites

- + **Reigate and Redhill:** Marketfield Way Car Park – planning approval received for cinema, retail and residential. The site is owned by the council and the council is looking to take it forward independently. Redhill Station – residential led proposal to consolidate car parking and other land around the station to deliver 202 units. Requires the station car park to be bought which could be prohibitive. Albert Road North – existing industrial site but encourages HGVs to not use residential areas therefore plans to convert into residential.
- + **Banstead:** Horseshoe site development – received One Public Estate funding for a masterplan to rationalise various public assets to deliver housing. However, there are concerns that the project is difficult to deliver. The masterplan (due end of 2019) is unlikely to include a delivery strategy as this is seen as a long-term project for the council. Other projects being brought forward by the private sector or already receiving funding from the borough council
- + **Horley:** Horley Business Park – transformational opportunity to provide up to 150,000 sqm of commercial space. This is envisaged to be high-spec office space strategically located near Gatwick. The delivery of the programme is being restricted by a key junction to unlock the site (and concern from Highways England about the pressure it will place on the motorway). The project has good levels of political support and will represent the Council's flagship commercial development.

Constraints and Challenges

- + **Reigate and Redhill:** Currently, the shopping centre is struggling to attract a large anchor wanting to take on the larger space in the town centre. Infrastructure in Reigate is a major challenge and the primary issue raised by officers was the Reigate level crossing which can cause major congestion in the town centre and restricts additional train services to the town. Pressure is also put on the town's road network due to proximity to Junction 8 of the M25. Generally, the road network resilience is poor and problems in the wider network often leads to increased congestion through the town and has been a principle factor restricting private investment in the town.
- + **Banstead:** Key large employers such as Legal and General have left the town recently which has affected job numbers. Banstead also has the highest house prices in the Coast to Capital area.
- + **Horley:** Officers believed that the town centre itself struggles from a lack of identity and is generally underutilised by local people. Masterplans have been commissioned in the past, however these have been ineffective due to issues with deliverability.

Summary Assessment

Assessment Findings

	Urban Centre	Typology / Score	Rank (of urban centres)
Function Assessment	Reigate and Redhill	Sub-regional economic hubs	n/a
	Banstead	Service Focused Hubs	
	Horley	Service Focused Hubs	
Prosperity Assessment	Reigate and Redhill	131	22 nd
	Banstead	163	14 th
	Horley	144	18 th
Opportunity Assessment	Reigate and Redhill	20	12 th
	Banstead	14	19 th
	Horley	21	9 th
Support Quadrant	Reigate and Redhill	4	n/a
	Banstead	2	
	Horley	4	

Assessment Conclusions

- + **Reigate and Redhill (Tier 3- regionally significant change potential):** Reigate and Redhill is an important urban centre for Coast to Capital, containing a significant proportion of the area's high value employment. There is evidence of significant momentum and private investment locally, however the centre requires a comprehensive strategic transport intervention to alleviate congestion to maintain its competitiveness.
- + **Banstead (limited change potential):** Banstead is a highly prosperous urban centre which performs strongly against a range of social, economic and environmental metrics. However, there is limited potential or appetite for growth locally.
- + **Horley (Tier 1 – 'transformational change potential):** Although council officers believed that Horley is the most deprived part of the borough, the centre performs relatively strongly against a range of prosperity metrics. Horley Business Park represents a significant opportunity and could help the area to realise the potential around Gatwick airport.

Appendix A. Gazetteer of Coast to Capital Urban Centres

13a. Tandridge: The District at a Glance



31,000 jobs and **52,689** working age residents



Median resident earnings are **£35,999**



House prices are **15.6 times** resident's median earnings



£2,230m total GVA

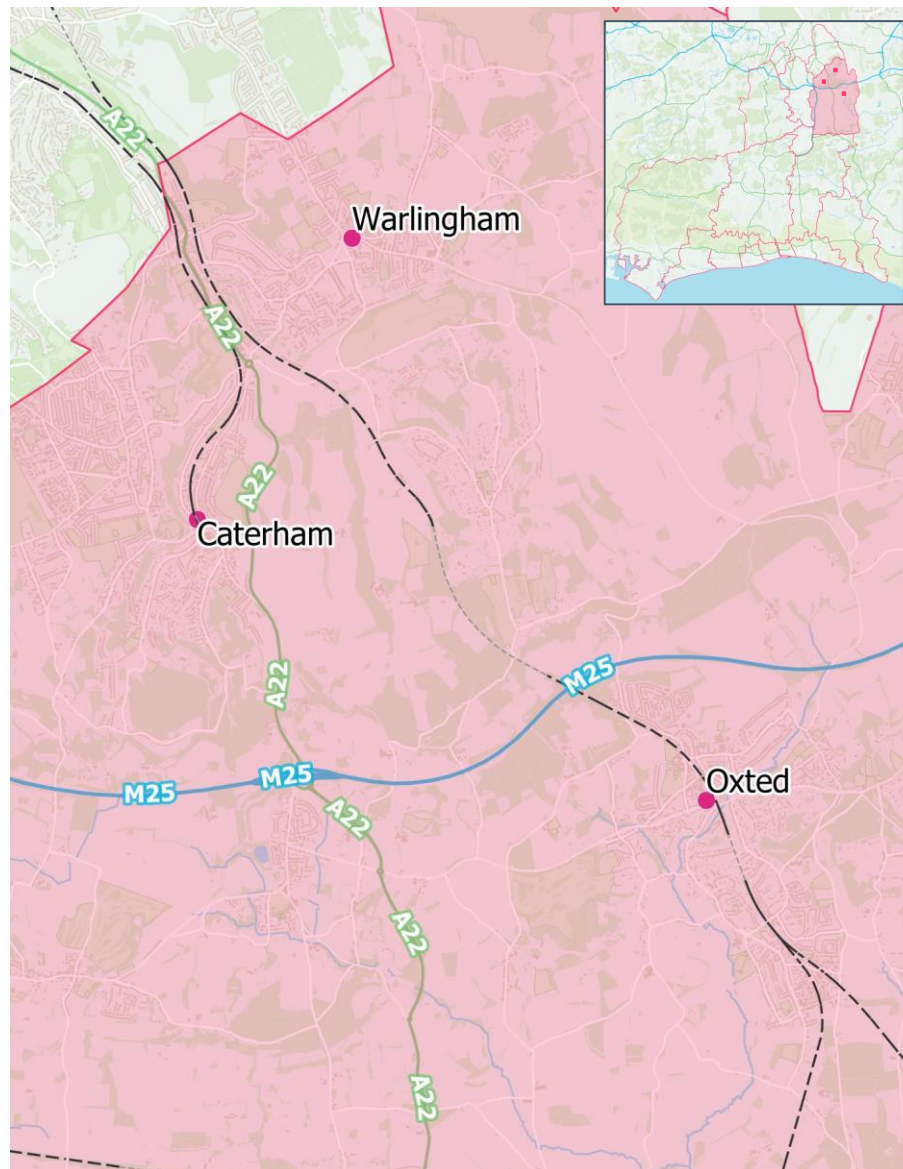
Importance to Coast to Capital:

3% of jobs

4% of working age residents

4% of GVA output

Tandridge's urban centres (best fit statistical definition)



Appendix A. Gazetteer of Coast to Capital Urban Centres

13b. Caterham Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	7,100	21	596,910	26.4m
Jobs to People Ratio (2017)	0.3	19	0.5	0.3
% Amenity Jobs (2017)	39%	20	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	20,370	22	1.3m	55.6m
Population Growth (2012-17)	6%	7	5%	4%
% LSOAs in the top 50% most deprived (2019)	0%	3	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	18%	13	26%	-
% reporting 'Good' Health (2011)	51%	7	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	2%	21	4%	10%
Town Centre Vacancy (2019)	9.3%	14	-	-
Office Vacancy (2019)	0%	1	-	-
Knowledge Jobs (2017)	14%	20	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	0%	12	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

13c. Oxted Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	4,250	26	596,910	26.4m
Jobs to People Ratio (2017)	0.4	14	0.5	0.3
% Amenity Jobs (2017)	51%	9	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	9,980	28	1.3m	55.6m
Population Growth (2012-17)	2%	26	5%	4%
% LSOAs in the top 50% most deprived (2019)	55%	24	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	0%	0	26%	-
% reporting 'Good' Health (2011)	0%	1	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	-7%	25	4%	10%
Town Centre Vacancy (2019)	3.9%	1	-	-
Office Vacancy (2019)	0%	1	-	-
Knowledge Jobs (2017)	19%	14	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	0%	1	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

13d. Warlingham Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	2,425	29	596,910	26.4m
Jobs to People Ratio (2017)	0.3	27	0.5	0.3
% Amenity Jobs (2017)	50%	11	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	9,520	29	1.3m	55.6m
Population Growth (2012-17)	5%	10	5%	4%
% LSOAs in the top 50% most deprived (2019)	0%	3	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	0%	1	26%	-
% reporting 'Good' Health (2011)	48%	9	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	-7%	24	4%	10%
Town Centre Vacancy (2019)	3.9%	1	-	-
Office Vacancy (2019)	3%	18	-	-
Knowledge Jobs (2017)	10%	26	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	0%	1	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

13e. Tandridge Urban Centres Opportunity Assessment and Conclusions

Growth Potential

Opportunity

- + The district is currently in the process of developing its Local Plan and has also undergone a recent change in political leadership – meaning that there is a degree of uncertainty regarding the scale and focus of future growth
- + Within the draft Local Plan, the proposal is to direct the vast majority of future housing delivery in the proposed garden community at South Godstone
- + Levels of growth and delivery for Oxted and Warlingham are comparatively low – limited to smaller sites (the one more significant scheme is the Oxted Gasworks site which is now in delivery)
- + In Caterham, there are ambitious town centre regeneration proposals focused around the redevelopment of the shopping centre to provide a larger and more diverse town centre offering. Proposals are currently on hold, however, as a result of market uncertainty and challenges in securing local consensus
- + The Caterham BID is highly active and is playing a key role in providing a voice for the town and its businesses.

Key sites

- + As per the above, the key opportunity sites related to the proposed South Godstone garden community and Caterham Church Walk shopping centre
- + In addition, the council has recently purchased a major office block in Caterham Town Centre – Quadrant House, with a view to safeguarding employment space within the town centre. The building is being refurbished and will provide a mix of spaces for business tenants.

Constraints and challenges

- + The most significant constraints in Tandridge are spatial and strategic. From a spatial perspective, there is limited space for growth in the existing urban areas – particularly Warlingham and Oxted. From a strategic perspective, the ongoing Local Plan development process means that there is currently a degree of uncertainty regarding the future scale and focus of delivery.
- + From an economic perspective, the limited supply of employment space is a major constraint and forms a key part of the rationale for the Quadrant House scheme in Caterham. Competition from neighbouring, larger centres, is also a considerable challenge – with all three urban centres currently providing a relatively locally focused service offer.

Summary Assessment

Assessment Findings

	Urban Centre	Typology / Score	Rank (of urban centres)
Function Assessment	Oxted	Service Focused Hubs	n/a
	Warlingham	Service Focused Hubs	
	Caterham	Service Focused Hubs	
Prosperity Assessment	Oxted	109	28 th
	Warlingham	133	21 st
	Caterham	121	25 th
Opportunity Assessment	Oxted	12	25 th
	Warlingham	10	27 th
	Caterham	14	19 th
Support Quadrant	Oxted	1	n/a
	Warlingham	1	
	Caterham	1	

Assessment Conclusions

- + If delivered as currently anticipated, South Godstone has the potential to become a new urban centre, with a population around the threshold of 10,000; however, these aspirations are relatively long term in nature
- + **Caterham (locally significant change potential):** Shorter term, the most important area of focus is Caterham: the need for regeneration activity is long established but challenges in securing investment and local consensus is constraining delivery.
- + **Oxted and Warlingham have limited change potential** focus on support town centre vitality and enabling small scale growth opportunities where these come about.

Appendix A. Gazetteer of Coast to Capital Urban Centres

14a. Worthing: The Borough at a Glance



49,000 jobs and **65,786** working age residents



Median resident earnings are **£28,579**



House prices are **11.7 times** resident's median earnings



£2,590m total GVA

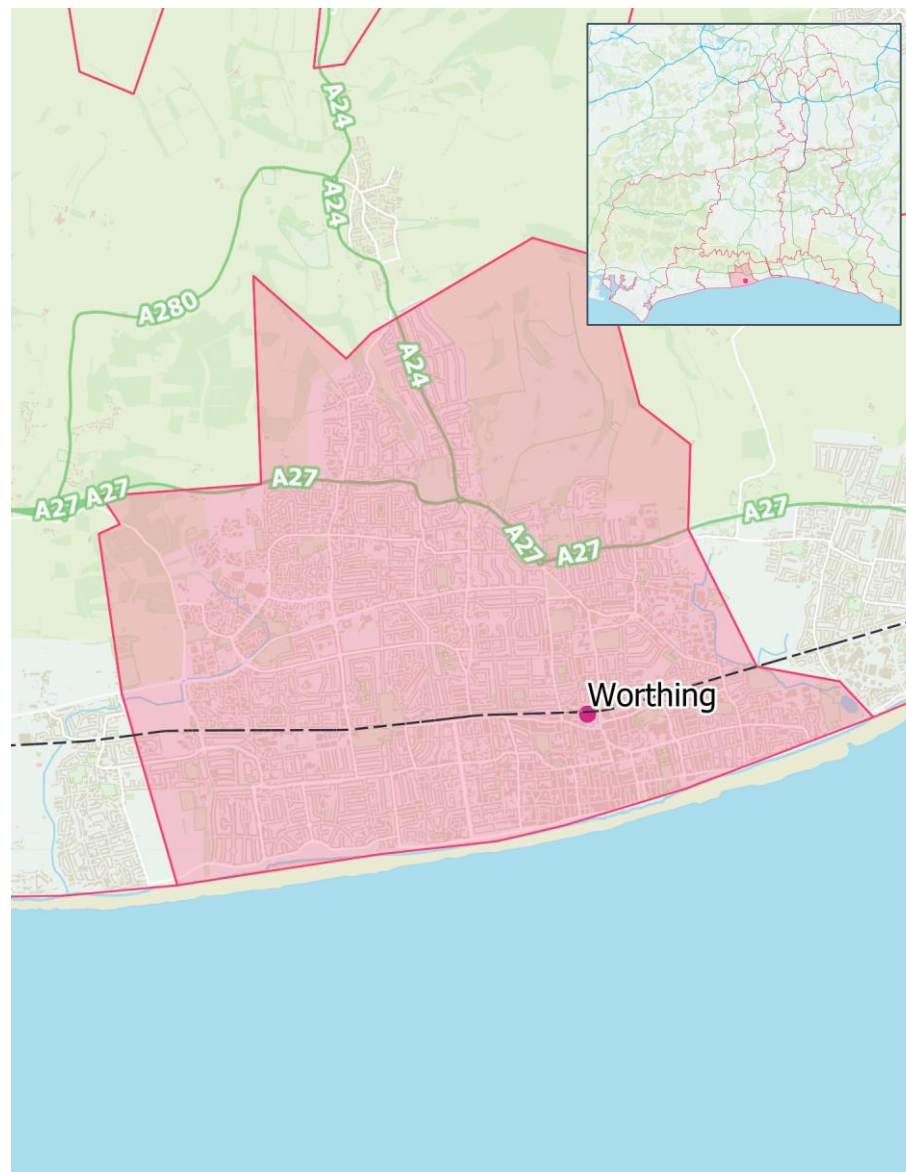
Importance to Coast to Capital:

5% of jobs

5% of working age residents

5% of GVA output

Worthing's urban centres (best fit statistical definition)



Appendix A. Gazetteer of Coast to Capital Urban Centres

14b. Worthing Urban Centre

Economic Function

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Jobs (2017)	49,000	3	596,910	26.4m
Jobs to People Ratio (2017)	0.4	11	0.5	0.3
% Amenity Jobs (2017)	55%	5	45%	66%

Social Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Population (2017)	109,630	3	1.3m	55.6m
Population Growth (2012-17)	4%	15	5%	4%
% LSOAs in the top 50% most deprived (2019)	43%	21	32%	-
% LSOAs in the top 30% most deprived for Housing Deprivation (2019)	0%	1	26%	-
% reporting 'Good' Health (2011)	44%	22	35%	34%

Economic Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
Employment Change (2012-2017)	6%	15	4%	10%
Town Centre Vacancy (2019)	11.4%	22	-	-
Office Vacancy (2019)	5%	22	-	-
Knowledge Jobs (2017)	12%	23	21%	20%

Environmental Prosperity

	Unit	Urban Centre Rank	Coast to Capital Urban Centre Average	England Average
% LSOAs in top 30% Living Environment Deprivation (2019)	34%	26	15%	-

Appendix A. Gazetteer of Coast to Capital Urban Centres

14c. Worthing Urban Centre Opportunity Assessment and Conclusions

Growth Potential

Opportunity

- + Council research notes that that Adur and Worthing's population of those aged 25-40 is growing, resulting in quickly changing demographics (referred to as Coastal drift). It is believed that a significant proportion of this is people moving from London and Brighton to take advantage of the proximity to those places and cheaper residential and commercial values.
- + The Council are very open to growth and have been proactive to network the potential of the area's urban centres to private and public investment. The council are looking at maximising town centre space including the nascent opportunity above shops to use as workspace.

Keys sites

- + Decoy Farm - An ambitious plan to upgrade an environmentally challenging but sizable plot of allocated employment land that has stood unused for over three decades. The completed project would boost employment opportunities and economic performance in the entire Coast to Capital LEP region.
- + Collonade House Creative Hub - a Creative Hub in the heart of Worthing's town centre which would provide affordable workspaces for the Creative Community and offer a central focus for business support in an environment suitable for collaborative working. There is potential to extend provision at this site and the council are exploring similar models if key retail anchors are to leave the high street.
- + Union Place – mixed use town centre 200 homes, commercial space, which could include a hotel, and two modern cinema screens joined to the Connaught Theatre

Constraints and challenges

- + Council's research on high street/wider town centre vitality showed that within West Sussex, Lancing ranked 1st and Worthing ranked 3rd for highest vacancy rates. High commercial vacancy rates in the town centre. However, discussion with officers revealed that the figures are distorted by the fact that there is a significant amount of 3/4 storey commercial premises in the town with only the ground floor currently occupied which masks the overall picture. Despite this, the town has retained key retail anchors Debenhams and M&S.
- + Officers noted that spatial constraints mean that Worthing is unlikely to be able to meet government housing targets despite looking at opportunities for westward expansion.

Summary Assessment

Assessment Findings

	Urban Centre	Typology / Score	Rank (of urban centres)
Function Assessment	Worthing	Sub regional economic hubs	n/a
Prosperity Assessment	Worthing	203	3 rd
Opportunity Assessment	Worthing	22	7 th
Support Quadrant	Worthing	3	n/a

Assessment Conclusions

- + **Tier 3: regionally significant change opportunity:** Whilst the demographics of Worthing are likely to continue to shift in the coming years as a result of coastal drift, the urban centre still performs poorly against a range of social, economic and environmental prosperity metrics. Despite this, there is significant momentum and a clear delivery track record to drive development and diversification within the town centre.



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