

Focus

on East Sussex

2011 annual monitor

East Sussex at a glance

East Sussex at a glance	2002	2003	2004	2005	2006	2007	2008	2009	2010	Trend
Total population (Mid-Year Estimate)	496,600	500,800	502,500	506,200	507,800	509,700	511,100	512,100	-	↑
Children: % aged 0 - 15	18.6	18.5	18.4	18.1	18.0	17.9	17.8	17.7	-	→
Working age: % aged 16 – pensionable age ¹	55.7	56.0	56.0	56.1	56.1	55.8	55.5	55.2	-	↔
Retired population: % aged pensionable age and over	25.7	25.5	25.7	25.8	25.9	26.3	26.7	27.1	-	↑
Very elderly: % aged 85+	3.6	3.4	3.4	3.6	3.7	3.8	3.9	3.9	-	↑
Percent of population of working age in work	-	-	-	74.8	75.1	74.0	76.4	73.7	74.0	↔
Number of jobs (excl. self-employed)	162,000	159,200	163,000	169,300	166,400	167,000	168,400	163,200	-	→
Percent of jobs in knowledge-based industries	-	-	33.2	33.4	34.0	33.0	30.9	-	-	→
Percent unemployment (claimant) rate (December)	1.8	1.8	1.6	1.9	1.9	1.6	2.5	3.4	2.9	→
Number of VAT and PAYE registered businesses	-	-	21,685	21,620	21,765	22,110	22,205	22,320	-	↑
Gross Value Added (Index UK = 100)	74	74	75	74	73	70	68	-	-	→
Average earnings (Index GB = 100)	84	84	88	85	88	83	87	85	84	→
Percent of new homes built on previously developed land	78	85	92	94	87	92	89	83	79	→
Price of a semi-detached house (as at Q1 of each year)	£127,800	£167,600	£177,300	£198,600	£200,900	£208,700	£230,500	£193,000	£218,700	↑
House prices/earnings affordability ratio ²	4.7	7.1	8.1	8.5	8.6	9.3	9.5	8.1	8.9	↑
Number of road casualties killed or seriously injured	404	365	343	353	392	378	398	373	319	→

Key

- ↑ increasing
- ↗ no trend
- ↔ staying the same
- ↓ decreasing

¹ Pensionable age is 65 for men, 60 for women.

² This ratio is calculated by dividing the lower quartile house price by lower quartile earnings for full-time workers.

With a population of just over half a million, East Sussex covers an area of 1,725 square kilometres (660 square miles) and includes the districts of Eastbourne, Hastings, Lewes, Rother and Wealden.

'Focus on East Sussex' is the summary annual monitoring report prepared by the Economy, Transport and Environment Department's Research and Information Team. It shows important information on key trends about the county's economy, demography (changes in population), land use and the environment. All the information summarised here (and much more) can be found on the East Sussex in Figures (ESiF) website. ESiF is funded by East Sussex County Council and has been developed by the Research and Information Team with the support of all six Local Strategic Partnerships (LSP's).

Visit the ESiF Website at eastsussexinfigures.org.uk for more information.

Key trends

The country's economic recovery could, at best, be called tentative. Coming out of the worst recession in the last 50 years is making life tough for the people of East Sussex and we can see just how tough when looking at:

- job creation, where growth has been very slow in 2010 and, to some extent, has reversed in the early part of 2011;
- relatively high levels of deprivation, particularly in coastal areas;
- widespread reductions in the levels of household income; and
- reductions in public sector expenditure that will impact on the number and extent of services the County Council is able to provide in the future; in many cases the full effect of these will only become clear during the course of 2011.

Even though we will eventually recover from the recession, economic recovery over the next few years is projected to be slow adding to the challenges we already face. Challenges such as environmental pressures will continue as a result of increasing population levels, and additional pressures to provide more specific types of housing as a result of an ageing population. As well as land for housing we also need to consider land for employment use, and community and infrastructure facilities for the county as a whole. These pressures are increased by the creation of the South Downs National Park which came into existence as an authority on 1 April 2010. The National Park is over 1600 square kilometres and stretches 100 miles from the edge of Winchester to Beachy Head. This means that with the environmental challenges and spending pressures ahead, decisions need to be based on robust evidence and careful planning for the future.

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Director

Economy, Transport and Environment Department, East Sussex County Council

Employment in East Sussex

Economy

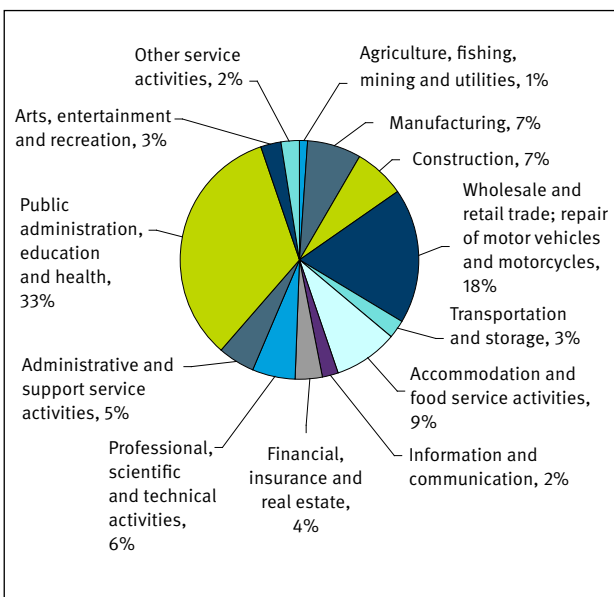
• Service industries dominate

The East Sussex economy is dominated by service industries. In 2009, 85% of jobs in the county were in the service sector, 7% in manufacturing, 7% in construction and 1% in agriculture, fishing, mining and utilities.

One-third of all people who work in East Sussex are employed in public administration, education or health, with 41% of people who work in Hastings employed in this sector. Wholesale and retail trade; and accommodation and food service activities account for 27% of people who work in the county. In Eastbourne, this figure is 31%.

Despite the very high percentage of people working in service sectors, some service industries are under-represented in the county. In the South East, 19% of people work in the information and communication, financial and real estate and professional sectors combined, compared with 12% in East Sussex in 2009.

Employment by industry in East Sussex, 2009



• Number of jobs

Between 2008 and 2009, the number of jobs (including self-employed) in East Sussex fell by 1.8%, from 179,400 to 176,100. This compares with a fall of almost 2.1% in the South East over the same period.

During this period, the number of jobs fell fastest in Hastings, down by 3.6%, and the fall was lowest in Rother, where the number of jobs fell by just 0.8%.

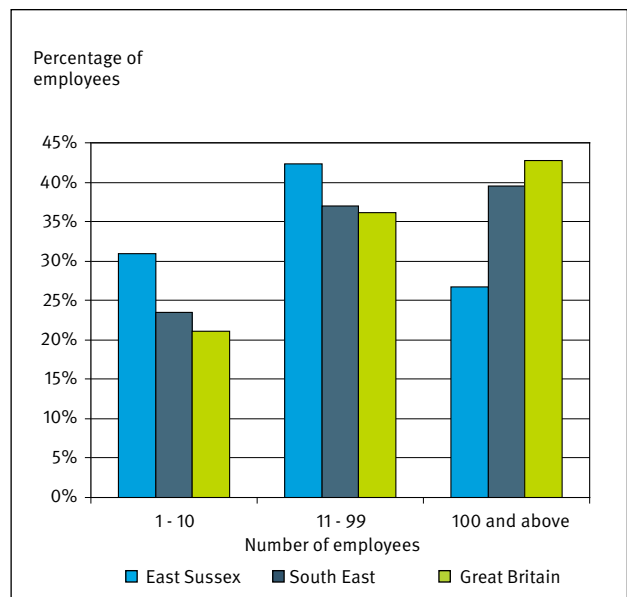
• Job density

Job density is the term used for the number of filled jobs in an area divided by the number of people of working age (between 16 and 64) who live in that area. Job density for East Sussex in 2008 remained at 0.76. This is below the average for the region (0.86 per person) and the national average (0.83 per person).

• High percentage of small firms

The economy in East Sussex is characterised by its high number of small businesses. The average business had just over seven employees in 2008.

Size of businesses, 2008



Employment in East Sussex

In East Sussex, three-quarters of businesses employ five or less people, while 88% of local companies employ 10 or fewer people.

As a result, it is not surprising that a fairly low percentage of people who work in East Sussex work for large businesses. Only 27% of people who work in East Sussex work for companies that employ 100 people or more. This compares with an average of 43% nationally and 40% regionally.

Wealden has the smallest average business size (nearly six employees) of all districts in East Sussex, compared with Eastbourne which has almost 11 employees per business.

The large number of small businesses in East Sussex reflects the high number of consumer service activities (such as shops, cleaning, pubs and leisure activities) in the local economy.

• Increase in businesses

In 2009 there were 22,320 active business enterprises registered for VAT and/or PAYE in East Sussex, an increase of 0.5% since 2008. This is similar to the national and regional increase (0.7%) in the number of businesses.

The number of businesses active in East Sussex has risen by 2.9% since 2004. This is below the increase of 8.3% in Great Britain and 6.2% in the South East over the same time.

Wealden had 8,105 active businesses in 2009, almost double the number of businesses in any other district in East Sussex.

• Commercial development slowing down

In 2008/09 48,700 square metres of commercial and leisure development was completed, compared with around 34,000 square metres in the previous year. Most of this development was in Hastings, Lewes and Wealden.

In 2009, some 211,200 square metres of business floor space in East Sussex had planning permission (around 29,800 square metres of which is now being built). This is much lower than the 73,000 square metres of development that was under construction the year before.

The total area of land available for business development across the county has fallen from 165 hectares in 2005 to 124 hectares in 2009.

• Creative and knowledge-based industries

Creative industries are 'those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of economic property', as defined by the Department for Culture, Media and Sport (DCMS).

The number of people working in creative sectors increased between 2008 and 2009, in spite of an overall fall in employment. The most important creative sectors are Software and electronic publishing; Music, visual and performing arts; and Publishing. In 2009, while there was an increase in employment in the Music and arts sector, the numbers in Software publishing fell.

Knowledge-based industries are those based on intangible assets such as knowledge, skills and innovative potential which provide a key resource for competitive advantage.

More than half of employment in knowledge-based industries is in the high- and medium-high technology industries and knowledge intensive services. Between 2007 and 2008, employment in knowledge based industries fell as overall employment increased slightly. Only employment in medium-low technology industries increased.

Residents who work

- **Greater percentage of people in work**

Census figures show that the percentage of the county's working age population (aged 16 to 64) in employment increased from 71% in 1991 to 75% in 2001.

Estimates suggest that the percentage of the county's workforce in employment remained stable at 74.0% in the year ending March 2010, slightly lower than its peak of 76.4% in June 2008, but up marginally from 73.7% in March 2009. This is below the South East rate of 74.5% but higher than the national average of 70.3%. Across the county, the highest employment rate is found in Wealden at 77.7% and the lowest in Eastbourne at 71.6%.

- **Unemployment down, but rising**

In December 2010 there were 8,816 (2.9%) unemployed adults claiming Job Seekers Allowance (JSA) in East Sussex. This is lower than the national rate (3.5%), but higher than the average for the South East of 2.4%.

Over the year to December 2010 the number of people claiming JSA fell by 1,348 across the county, a fall of 13%. This fall occurred between February and November, with claimant numbers rising by 793 between December 2009 and February 2010 and then falling by 2,347 between February and November 2010. In December 2010 the number of claimants has begun to climb again with a rise of 206.

Hastings continues to have the highest JSA claimant rate of all local authorities in the South East at 5.6%. After rising in the first couple of months of 2010, claimant numbers here fell overall in the year to December, but at a much slower rate than in other districts. The rise in claimant numbers between November and December 2010 was most acute in Hastings and Rother.

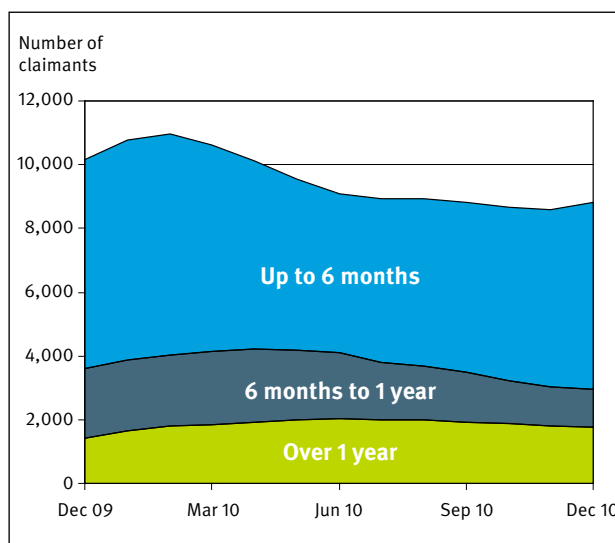
Eastbourne, Lewes and Wealden saw a spike in claimant numbers in the first couple of months of 2010, but numbers fell in the months up to November 2010. In December 2010, claimant numbers started to increase slowly once more in Eastbourne and Wealden but numbers continued to fall in Lewes.

In 23 of 101 wards in East Sussex, the number of people claiming JSA is equal to or higher than the national average. These wards are mainly in the county's coastal towns, including 13 in Hastings, 4 in Bexhill and 2 in Eastbourne. Central St Leonards ward in Hastings continues to have the highest claimant rate in the county at 12.2%, but rates are also very high in Castle (10.0%) and Gensing (8.7%).

- **Unemployment by age and duration**

In December 2010, 42% of people claiming JSA were aged 25 to 44 years, 30% were 45 and over, and 28% were under 25. A higher percentage of unemployed people in East Sussex are aged 45 and over, compared with the figure for the whole of Great Britain.

Total number of claimants by duration group, December 2009-December 2010



Employment in East Sussex

In East Sussex, two thirds of claimants have been out of work for up to six months and one in five have been out of work for over one year. Since December 2009, long-term unemployment (of over one year) has risen by 335 to 1,770, but the number of people claiming for less than one year has fallen. In December 2010, however, the number of short term claimants has started to rise again.

Hastings has the highest percentage of people out of work long term with 37% of all claimants being unemployed for more than six months.

• Jobs

The 2009/10 Annual Population Survey shows that 29.4% of people who live in East Sussex have jobs in managerial and professional roles. This percentage varies between districts, from 20.9% in Hastings to 36.6% in Lewes.

East Sussex residents working in lower skilled jobs account for 9.1% of the working population. This is a little above the percentage for the South East at 9.7% and for Great Britain at 11.1%.

• Hours people work

In 2001, men who were living and working in East Sussex worked an average of 42.3 hours a week – similar to the number of hours for the South East and for England and Wales. However, 27% of men working and living in the county worked over 49 hours a week, which is slightly higher than the figures for the region and the rest of the country.

Women living and working in the county worked an average of 30.3 hours a week in 2001. This shows that, of those in paid employment, a much greater percentage of women than men work part-time.

• Low skills levels

Skills levels of residents of working age are slightly lower in East Sussex compared with the regional average.

In the year ending December 2009, half of all residents of working age in East Sussex were qualified to at least NVQ Level 3. This is equal to the national average and slightly lower than the South East Region.

The percentage of residents qualified to degree level and above improved between 2008 and 2009, from 27% to 30%, equal to the national figure.

Lewes and Rother have the highest percentages of residents with higher level qualifications, (Level 4 and above).

At over 12%, Rother has the highest percentage of residents with no qualifications, compared with the county average of 8%.

Qualifications of residents, December 2009

	Residents of working age	
	With no qualifications	Qualified to at least NVQ Level 3
East Sussex	7.9%	50.3%
South East	9.1%	52.6%
Great Britain	12.3%	49.3%

Commuting

• More people commuting into and out of East Sussex

Since 1991, East Sussex has seen a significant increase in the number of people commuting to work. The number of people travelling into the county to work increased by around 4,500 to just under 16,400 by 2001. Over the same period, the number of East Sussex residents commuting to work

Employment in East Sussex

outside the county increased by nearly 9,700 to around 48,700.

These changes are similar to the increases in commuting levels over the previous 10 years from 1981 to 1991. As a result, the overall level of net out-commuting (the number of people commuting to work out of the area, less the number of people commuting to work into the area) increased from 20,600 in 1981 to 27,100 in 1991, and to 32,300 today. This is an increase of 57% over the 20 years.

Although the number of people commuting into East Sussex to work has increased over the last 20 years, the number of people commuting out of the county has continued to rise more significantly. The number of people commuting out of the county to work has increased by nearly 70% from just under 29,000 in 1981 to nearly 49,000 today.

Of all East Sussex residents who are in paid employment, nearly one in four now travel outside the county to work.

• Commuting flows by district

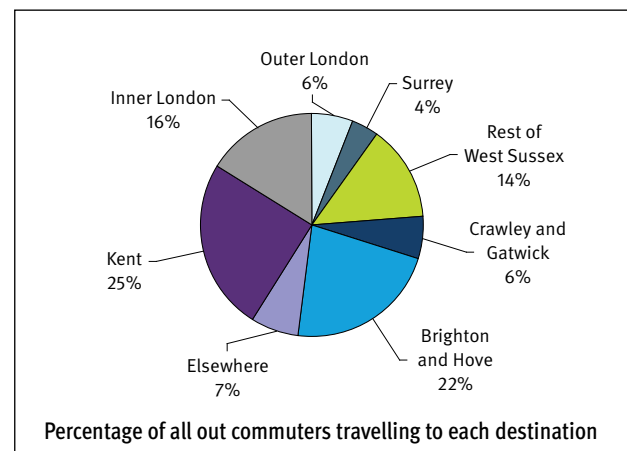
Only in Eastbourne do more people commute into than out of the district but, even here, the net inflow of people travelling into the district to work decreased from 3,000 people in 1991 to only 400 people today.

Across the county, about 60% of working residents live and work in the same district (compared with around two-thirds in 1991). Not surprisingly, this percentage is highest in the two urban boroughs of Eastbourne (73%) and Hastings (70%). This compares with Wealden where only 54% of working residents live and work in the district.

• Where people live and where they work

Just over 80% of people commuting to work in East Sussex from outside the county, travel from homes in Brighton & Hove, West Sussex or Kent.

People who live in East Sussex and travel to work outside the county, 2001



Around two-thirds of local residents commuting out of East Sussex to work, travel to those same places. However, more than one in five of East Sussex residents travelling to work in other areas are commuting to London.

• Longer journeys to work

In 2001, the average distance East Sussex residents travelled to work (not including people working at home) was just below 16 kilometres. Even though we do not have the same information from the 1991 Census, our best estimates suggest that the average distance people in East Sussex travelled to work in 1991 was around 10 kilometres. This suggests that the length of the average journey to work increased by 60% in the 10 years to 2001.

• More people working from home

Although commuting to work outside the county increased considerably during the period 1991-2001, another significant change during this period was the increase in the number of East Sussex residents working mainly at, or from, home. This number more than doubled to 24,500 in 2001, and accounts for 12% of all residents who work. Rother and Wealden (which are largely rural) have the highest percentage of people working from home in East Sussex.

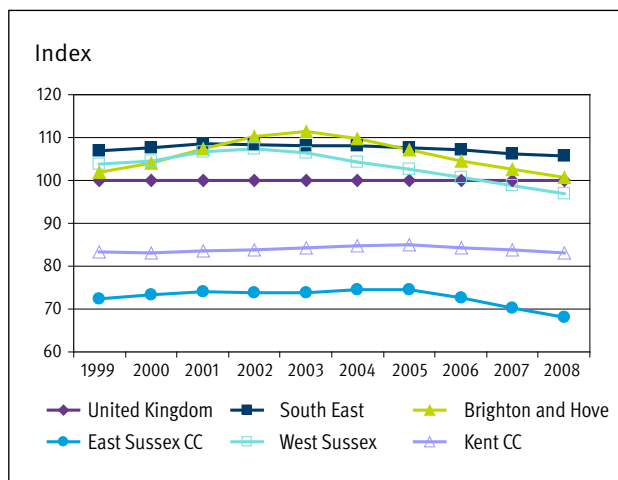
Employment in East Sussex

Income, earnings and wealth creation

- **Poor economic performance**

Gross Value Added (GVA) measures the overall value of goods and services produced in the economy. The county had an estimated GVA of £7.170 million in 2008. This is just less than 4% of the total for the South East.

GVA per person, 1999 to 2008 (Index: UK = 100)



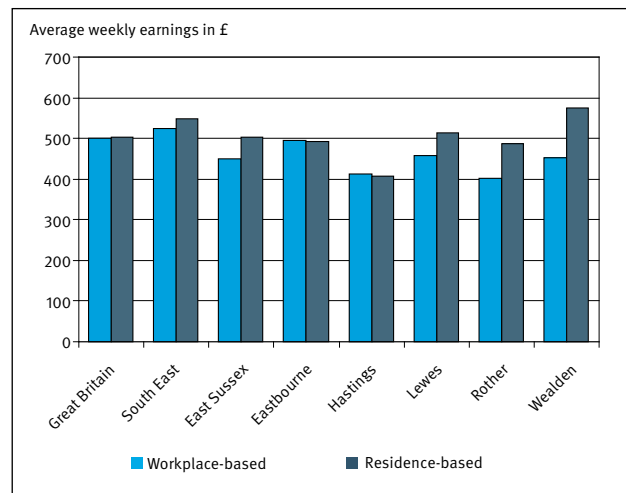
At £14,018, GVA per person in East Sussex is only 68% of the average for the UK and just 65% of the regional figure. Medway and the Isle of Wight are the only other areas in the South East with lower GVA figures per person. As can be seen in the graph above, the index has been falling since 2005.

- **Low average wages**

In 2010, the average gross weekly wage (before tax and national insurance are deducted) for employees who work full-time in East Sussex was £450. This is 14% (£74) below the average for the South East, and 10% (£50) less than the average for Great Britain. With the exception of the Isle of Wight, people who are employed in East Sussex receive the lowest average weekly wage of any county or unitary authority in the South East.

There are also significant differences between what people earn across the county. The highest average full-time wage of £495 a week in Eastbourne is 23% (£94) higher than the lowest average full-time wage of £401 in Rother.

Average weekly earnings for all full-time employees – workplace and residence based, 2010



- **Residence-based earnings**

Many people who live in East Sussex commute to better-paid jobs outside the county. This is reflected in the residence-based earnings figures for East Sussex. These figures show the average wages of people who live in the county irrespective of where they work.

Based only on where they live, the average gross weekly wage for people who live in the county and work full time is £504. This is £54 higher than the average wage paid to those working in the county (a small percentage of whom live somewhere else).

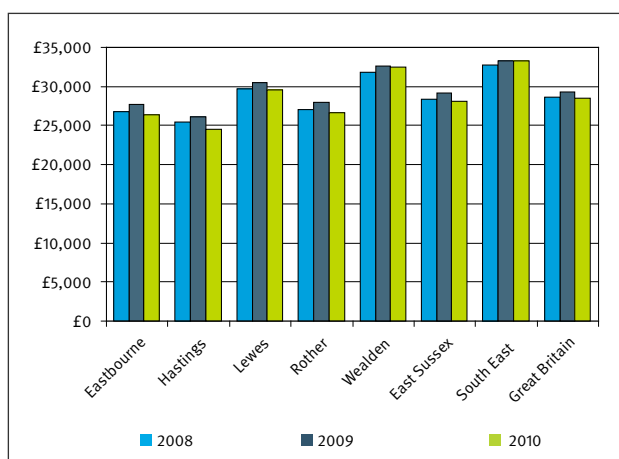
Although the average wage received by people living in East Sussex is still 8% lower than the average for the South East, it is more or less equal to the average for Great Britain (£502 a week).

Employment in East Sussex

- **Household incomes falling gradually**

Figures for average gross household income (before tax and national insurance are deducted) do not just show what everyone in the household earns but also take account of income from their savings and investments and any benefits they might receive. In a county with such a high percentage of retired residents, these other sources of income can clearly be significant for many households.

Average annual household income, 2008-2010



In East Sussex, the average yearly household income is estimated to have fallen by 3.4% since 2009. At £28,200, it is 1.0% below the average for Great Britain and 15.3% below the regional average.

Average household incomes are highest in Wealden and Lewes (where they are above the national average) and lowest in Hastings, where incomes are nearly 14% lower than the national average.

- **Significant areas of deprivation**

The Indices of Deprivation 2010 (ID2010) measure deprivation in relation to seven different factors. These are:

- low incomes;
- lack of work;
- poor health;

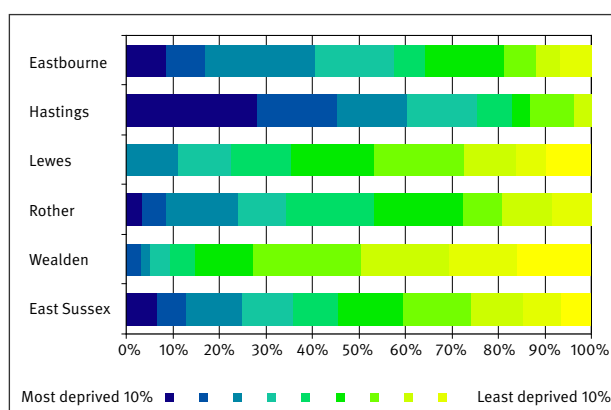
- education, skills and training;
- poor housing and access to services (such as the distance to nearest GP, supermarket, primary school or post office);
- crime; and
- poor living environment.

The scores from each category are combined to produce an overall measure of multiple deprivation in any one area. Most of the data used to construct the indices relates to 2007/08, although 2001 Census data is still used for some indicators.

The ID2010 measures deprivation for lower layer super output areas (LSOAs). These are areas that are smaller than wards and contain around 1,500 people. There are 327 LSOAs in East Sussex, of which 22 are amongst the 10% most disadvantaged LSOAs in England. Of these, 15 are in Hastings, five are in Eastbourne and two are in Rother.

East Sussex experiences the highest levels of deprivation of all the counties in the South East, with 42 (13%) of the county's LSOAs being ranked within the 20% most deprived areas in England. The most significant levels of deprivation are concentrated in the county's coastal towns. Hastings is the most deprived local authority area in the region and now also ranks amongst the 20 most deprived areas in the country.

Proportion of LSOAs by IMD 2010 decile



Employment in East Sussex

The child poverty index – or the Income Deprivation Affecting Children Index (IDACI) – measures the proportion of children aged 0-15 years that are living in income-deprived households. This includes households in receipt of Income Support or Tax Credits.

Although in terms of ranking, child poverty in East Sussex appears to be stable, the number of children living in low-income households has fallen from more than 17,000 to just below 16,400

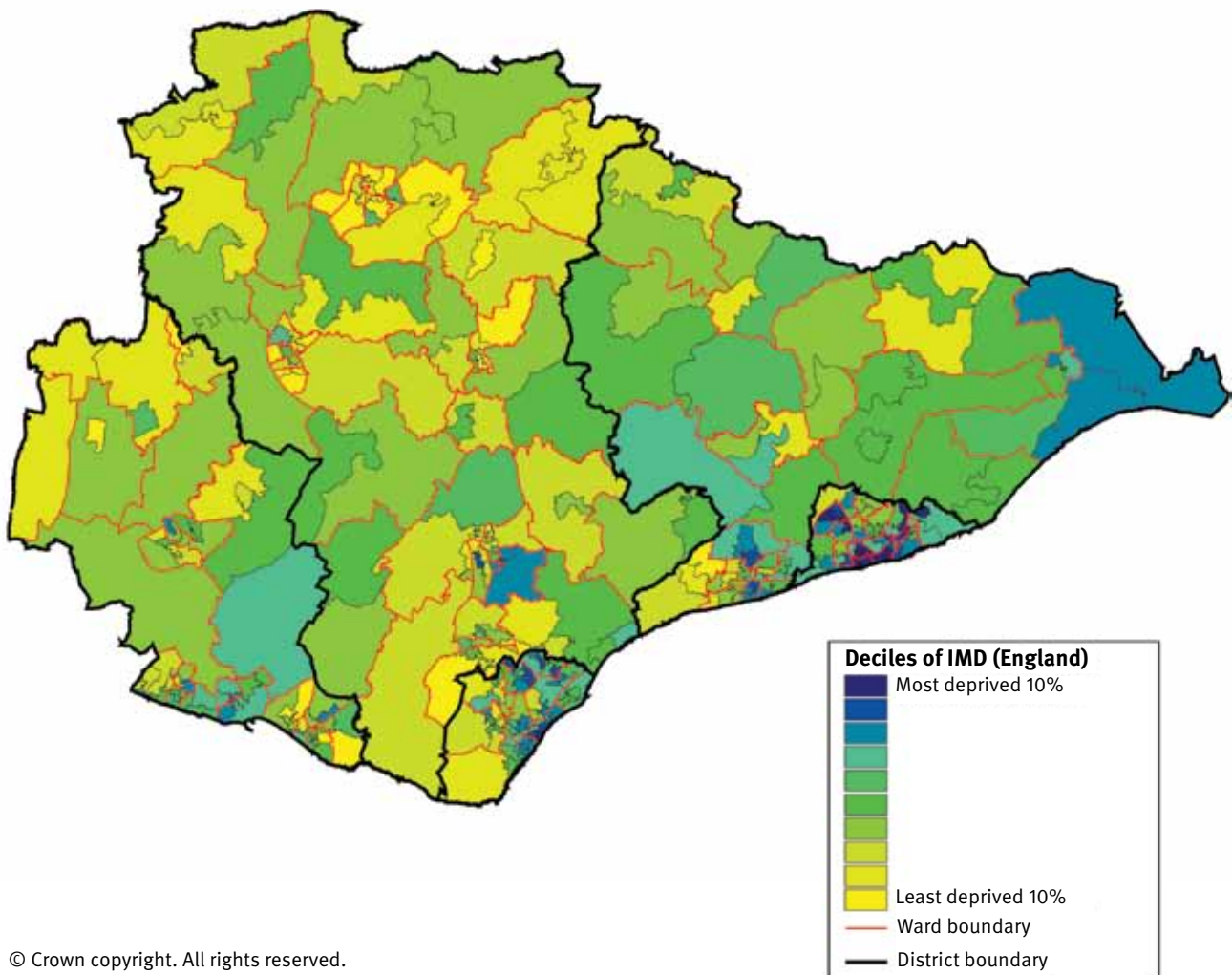
While nearly one in five children (18%) in East Sussex live in low-income households, 30% of children in Hastings live in low-income households.

Eleven of the county's LSOAs are ranked within the 10% most deprived nationally for child poverty. 10 of the 11 LSOAs with the highest levels of child poverty in East Sussex are in Hastings (in Tressell, Baird, Gensing, Hollington, Ore and Central St. Leonards wards); the other is in Sidley ward in Bexhill.

The older people poverty index – or Income Deprivation Affecting Older People Index (IDAOPI) – measures the proportion of people aged 60 years and over who are in receipt of means-tested benefits (including their partners if also aged 60+).

Seven LSOAs in East Sussex are amongst the 10% most deprived nationally for poverty among older people. All are located in Hastings.

Index of Multiple Deprivation 2010 – LSOAs in East Sussex



Population

• An increasing population

Around 512,000 people currently live in East Sussex. The population in the county as a whole increased by 19,000 people (3.8%) between 2001 and 2009. Growth rates in the districts have been more variable. Since 2001, Eastbourne has grown the fastest, by 7%; Hastings and Wealden have only grown by 2%.

• An elderly population

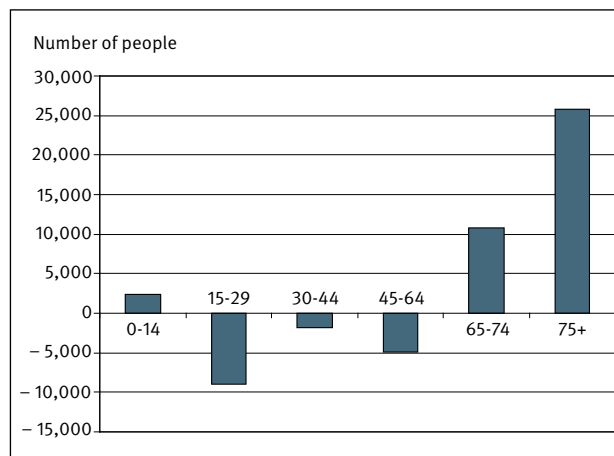
Elderly people make up a significant percentage of the population, with one in four residents being over pensionable age (65 for men and 60 for women). Even though this proportion has fallen from 29% in 1981 to 27% today, East Sussex still has the highest percentage of very elderly residents of any county in England (those aged over 85).

• Population growth in the future

Our latest projections (estimates of future change) suggest that the county's population is likely to increase to around 540,300 by 2026. This projected increase of 4.5% is lower than the actual increase over the past 15 years, which was about 7.5%.

Population growth in the future will be heavily concentrated among people in the older age groups (from age 50 and above). This is because the increased numbers of people born after the Second World War (often called 'baby boomers') will reach retirement age. Most of the younger age groups are likely to decrease in size over the next 20 years.

Population projections change by broad age group, 2011 to 2026



• More deaths than births

As a result of the relatively high percentage of elderly people in the county, there were about 800 more deaths than births in East Sussex in 2009. Although natural change across the county is still negative (more deaths than births) this has considerably reduced since 2002, as births continue to rise and deaths continue to fall.

East Sussex has the second highest rate of natural decrease in population (more deaths than births) of any shire county in England in relation to the size of its population. Rother has the highest rate of natural decline of all the districts in the country.

• Continuing net in-migration

Continuing population growth in East Sussex is entirely due to net in-migration – more people moving into the area each year than are moving out. The level of growth from this net inflow of people moving into the county more than makes up for the natural population decrease caused by a higher number of deaths than births.

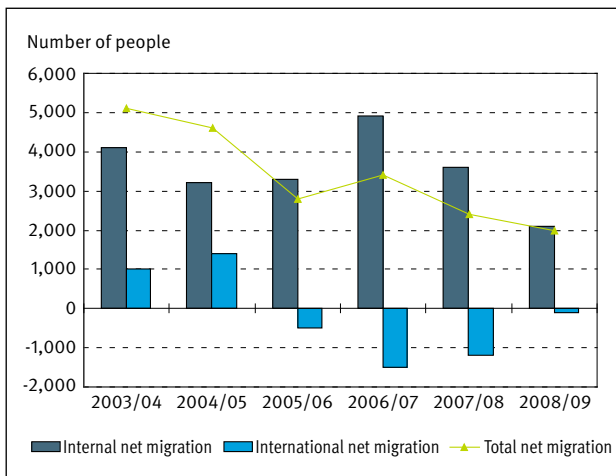
Migration flows are substantial in East Sussex, with 31,800 people moving in and 28,200 people moving out on average each year, a net migration gain of 3,400 people, including internal and international migration.

Population and housing

Migration within the UK makes up the biggest component of total migration in East Sussex with London accounting for 25% of all moves to and from the county. Amongst all moves within the South East many are from and into West Sussex and Kent.

In 2008/09 there was a net inflow of around 2,000 people moving into East Sussex. This was due to a larger net inflow of about 2,100 people moving into the area from other parts of the UK, and a net outflow of 100 people leaving the county to move overseas.

Net migrants to East Sussex from within and outside UK, 2003 to 2009

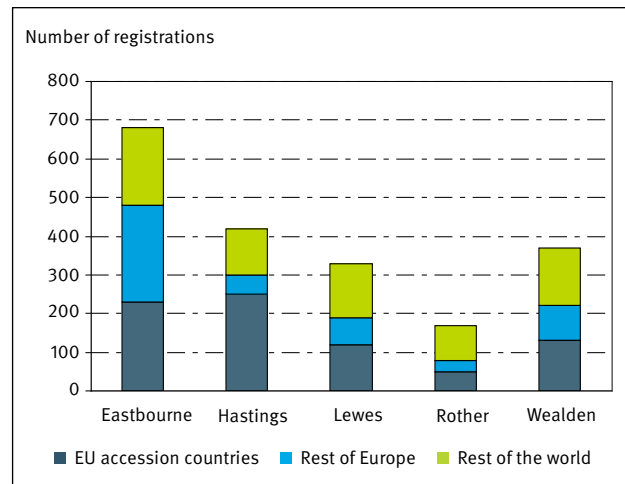


Eastern European migrants to East Sussex

The latest National Insurance data shows that around 780 workers from Eastern Europe registered for work in East Sussex in 2009, a substantial reduction since the peak in 2007. About 35% of them were from Poland and a further 23% from Latvia.

Registering for a National Insurance number is essential for non-UK nationals, either to work or to claim benefits in the United Kingdom. A further 490 workers who registered for work in the last year were from other parts of Europe and 700 from the rest of the world.

National Insurance number registrations by non-UK nationals in 2009



Smaller households

There are around 225,000 households in East Sussex. Around 54% are couples living together (45% married, 9% living with a partner) and 34% are households with only one person. The rest are single-parent families (6%) or people living in shared accommodation (5%).

Our latest projections up to 2026 suggest that the number of households in East Sussex is set to increase by nearly 9% over the next 15 years. This is much faster than the expected growth of the population as a whole of just over 4.5% for the same period. Much of the predicted growth for households is because the average number of people living in each household is expected to continue to decrease – from 2.16 people per household in 2011 to 2.06 people per household in 2026. This is because people are living longer, more couples are separating, getting divorced, and some are choosing to live alone for longer.

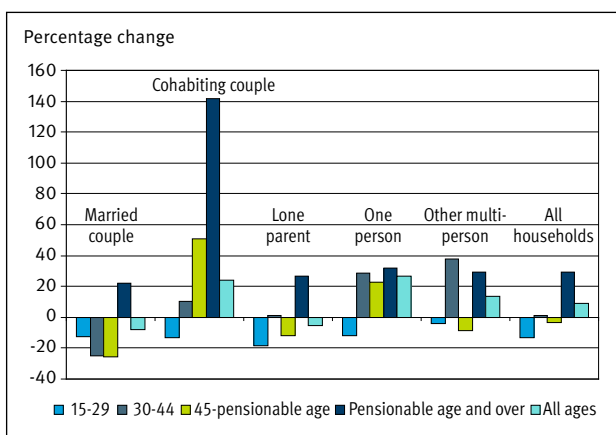
Over the next 15 years, the number of people living alone is likely to increase more than any other category of household and will represent almost 42% of all households by 2026. The number of unmarried couples

Population and housing

living together will also increase, while the numbers of married couples and single-parent households are likely to reduce.

The number of single-person households is expected to increase during this period because of the rise in the number of older people living in East Sussex whose partners may have died or who are no longer able to live at home.

Household projections change by broad age group and household type, 2011 to 2026



Housing

• New houses built

A total of 980 houses were completed in 2009/10, compared to about 1,400 in the previous year. An additional 5,700 new homes were built in the last four years. This is an average of 1,400 houses a year, which is in line with the housing targets set out in the South East Plan.

Although the Secretary of State revoked Regional Strategies in July 2010, this decision was challenged in the High Court and it ruled that the revocation was unlawful. The South East Plan therefore currently remains part of the Development Plan. However, it is still the government's intention to abolish Regional Strategies through the Localism Bill. Local planning authorities continue to bring forward their Local Development Frameworks (LDFs) and to decide on the level of housing provision.

• Housing planned for the future

Around 12,000 new homes already have planning permission or are set for development in LDFs across East Sussex. The majority will be built on larger housing sites (with more than 10 dwellings) and almost 18% of total new houses will be affordable housing (social rented and intermediate housing).

Extra homes will also be built on other 'windfall' sites – that is, sites which gain planning permission on land that has previously been developed but not previously identified or included in local planning documents.

• Development on brownfield sites

National planning policy encourages development on brownfield sites – previously developed land (PDL). The national annual target is that at least 60% of new housing should be provided on PDL.

The percentage of new homes built on PDL in East Sussex has stayed well above the Government's target for the past eight years. In the last year, it made up almost 80% of all new housing development. However, a lower proportion of homes will be erected on PDL in future as large amounts of new housing will have to be built on greenfield sites (land that has not previously been built on).

• Reusing empty properties

Each local housing authority has to develop a strategy to manage their empty properties and to report on their progress every year. There are currently 6,900 empty properties across the county, almost all within the private sector. This represents almost 3% of all homes in the county. Long-term empty properties which have been vacant for over six months represent just over 43% of all empty properties.

Population and housing

- **Increasing need for social housing**

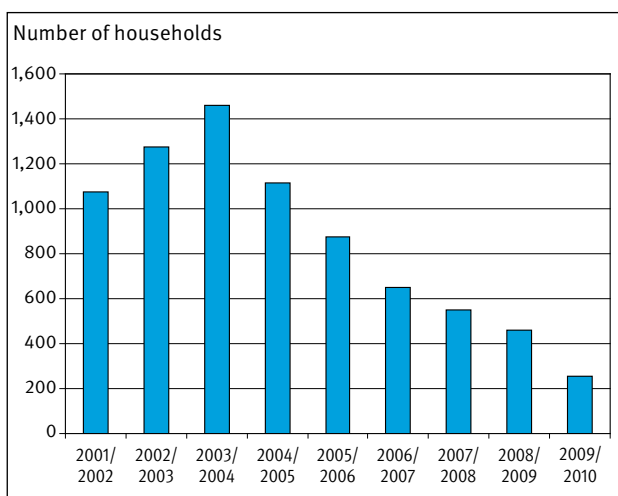
Despite the increase in demand for social housing, the relative stock available has declined in East Sussex. The proportion of households on the waiting list in the county, as percentage of the social housing stock, is about 53%, below the regional average and just above the national level.

The number of households on the housing register has increased by 40% since 2001, to a total of almost 11,000 households by April 2010. However, this represents only 4.5% of all dwellings, which is lower than nationally. Hastings has the greatest concentration of households on the housing register in the county.

About 83% of households on the housing register are small households who need homes with up to two bedrooms. Only 4% of households on the register need more than three bedrooms.

A greater focus on preventing people from becoming homeless has helped to reduce homelessness. The number of households accepted by local authorities as homeless has reduced since 2003/04 to a total of 250 in 2009/10.

Households accepted as homeless in East Sussex, 2001/02 to 2009/10



- **The affordability gap is still high**

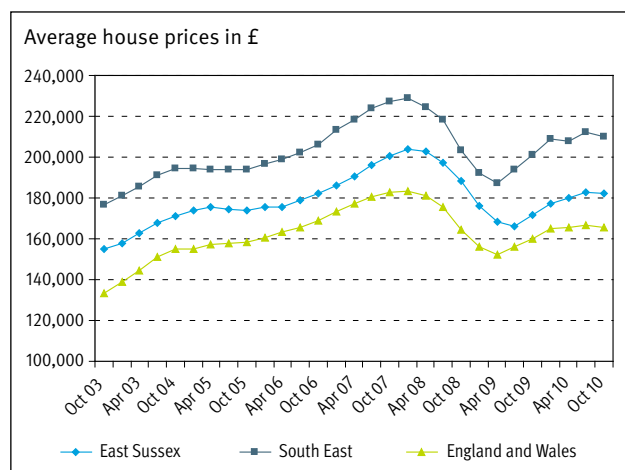
With around 75% of households owning their homes, the cost of housing for sale and what residents can afford to buy is a major issue in East Sussex – particularly for new households and key workers (such as nurses, teachers and care workers).

House price inflation is fuelled by the high number of households moving here from other higher-priced areas and because some residents are able to live here while commuting to better-paid jobs outside the county.

The recent economic downturn had its effect on house prices in East Sussex, as nationally and regionally. The house prices fell during 2008 and until mid-2009, when they started to increase again, rising by almost 11% to £182,700 between then and November 2010.

House prices in the county remain above the national average and well below the regional level. Average earnings locally are low and even with relatively low interest rates, many potential first-time buyers in East Sussex are not able to afford to buy a home.

Average house prices, 2003 to 2010



One common way of measuring the affordability of housing for sale compares the lower quartile price for housing in an area with the lower quartile earnings figure for full-time employees (male and female)

Population and housing

working in the same area. After a drop to 8 in 2009, the house price earnings ratio has increased again to almost 9 in 2010. Wealden and Lewes are the districts where houses are least affordable with a lower quartile house price of 10 times higher than the related earnings figure. Hastings has the lowest ratio of 6, which is very close to the national ratio.

• Little new social housing

The high cost of private housing (to buy or rent) increases the need for social housing (for rent or shared ownership).

New social housing is now provided almost entirely by housing associations. In 2009/10, 27% of all new housing development was in the social sector – an increase on the previous year’s figure of 12%. This resulted in 270 new social sector homes and about 150 houses a year in the last eight years.

Rented homes in the social housing sector in 2010 make up 20,200 homes across the county, which is just over 8% of all homes. This percentage has fallen from 17% in 1981, mainly because of people buying their homes (through the right-to-buy or right-to-acquire schemes) and because there is less social housing being built. There are now fewer homes in the social sector than there were 25 years ago.

To help increase the amount of new social housing, local authorities try to use land-use planning policies. They do this by including policies in local plans which mean private developers have to provide some ‘affordable housing’ as part of larger developments. A rural ‘exceptions policy’ also allows for a very limited amount of extra social housing to be developed in parts of Lewes, Rother and Wealden where housing development would not normally be allowed.

Ratio of lower quartile house prices to lower quartile earnings, 1997 to 2010



The environment of East Sussex, covering a range of natural, built and historic assets, is recognised in the South East Plan as being of high quality, variety and importance. This section focuses on five key topics, as indicators of change in general environmental quality.

- **Climate change**

Climate change is likely to mean hotter and drier summers, warmer and wetter winters, and an increased frequency, severity and cost of extreme weather events, including water shortages, heat waves, intense winter storms and flooding. The largest relative changes in temperature and rainfall in the UK will occur in the South East.

The Climate Change Act of 2008 set legally binding targets for reducing greenhouse gas emissions in the UK by at least 80% between 1990 and 2050. The County's Climate Change Strategy, agreed in 2009, commits to achieving the same target. Nationally, carbon dioxide (CO₂) emissions fell by only 0.6% annually in the period before the recession, relative to 2-3% annual cuts required in the period to 2020 to meet carbon budgets, but increased to 9.7% in 2009. To achieve the legally-binding target now requires an average reduction of around 3% per year. CO₂, released primarily when fossil fuels are burned, is the main greenhouse gas contributing to climate change.

Data are produced nationally by government on end user CO₂ emissions in East Sussex from businesses, housing and road transport. Emissions from gas and electricity use are based on fuel bills (other fuel bills are estimated), and transport emissions rely on A road traffic counts and the length of minor roads. Government estimates, summarised below, show that CO₂ emissions from East Sussex have decreased by 4.8%, to 5.9 tonnes of CO₂ per capita, over the period 2005 to 2008. This is a rate of change slightly below that of the national and regional average, and is less than half the rate of annual decrease required. Sustainable levels of emissions are estimated to be around 1 tonne per person per year (Mayer Hillman, 2004).

The climate has warmed by three-quarters of a degree centigrade over the last 100 years, and more than half of this warming has occurred since the 1970s.

Further warming is inevitable due to current levels of greenhouse gases in the atmosphere. A number of measures are in place to enable us to adapt to the effects of climate change, for example long term flood and coastal erosion risk management plans. Progress in developing and implementing these plans rests mostly with the Environment Agency, supported by a number of organisations, including local authorities.

Per capita CO₂ emissions in East Sussex 2005-2008

Area	Year	Industry and Commercial	Domestic	Road Transport	Total (kt CO ₂)	Population ('000s, mid-year estimate)	Per Capita Emissions (t)
East Sussex	2005	947	1,248	990	3,185	505.3	6.3
	2006	930	1,261	966	3,157	506.2	6.2
	2007	890	1,224	974	3,088	508.3	6.1
	2008	880	1,222	954	3,056	511.1	5.9

- **Air quality**

Air pollution is usually a mix of a range of pollutants from a number of natural and man-made sources, which can have an effect on human health and the wider environment. The government's advisory committee on the Medical Effects of Air Pollution estimates that poor air quality causes approximately 29,000 vulnerable people (ie the very old, very young, and the sick) to die prematurely in the UK each year, and that ambient air pollution can cause asthma. Government research has also concluded that evidence shows that the financial costs of air pollution rank alongside congestion, traffic accidents and obesity.

The national Air Quality Objectives are standards designed to protect human health, based on World Health Organisation guidelines, which in turn are based on current scientific data on the health effects of air pollution. They can be used as a benchmark to see if air pollution is getting better or worse over time. The Environment Act 1995 places a duty on local authorities to review the air quality in their area on a regular basis against these Air Quality Objectives.

The local authorities in East Sussex run a reasonably extensive air quality monitoring network, which shows that air quality in East Sussex is generally good, with exceptions along roads in Lewes, Newhaven and Hastings. We also have some of the highest recorded levels of ozone in the UK. A proportion of the air pollution measured in East Sussex originates from continental Europe, whilst the majority of the air pollution generated locally comes from traffic. A number of measures are included in the Local Transport Plan (LTP2) aimed at reducing this contribution, in particular in areas identified as having poor air quality.

The national Air Quality Strategy 2007 highlights that most policies and actions to improve air quality will also have benefits for climate change by reducing CO2 emissions, and vice versa. However, some policies don't achieve these win-win situations, for example, the gradual increase in diesel vehicles in the national fleet reduces CO2 emissions but increases air pollutants that impact on health.

Water resources and water quality

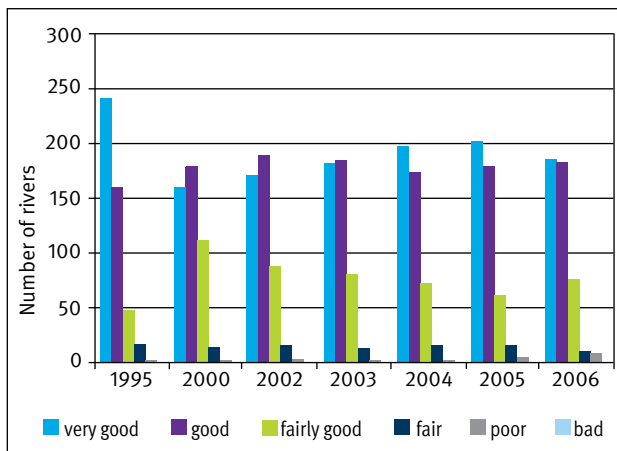
- **Water quality**

Groundwater and rivers provide a vital source of water for domestic, agricultural and commercial use, while beaches and bathing waters represent an important resource for tourism and recreational activities. Water quality is estimated by using surveys and assessed against national and European standards.

The Bathing Water Directive (76/160/EEC) sets water quality standards for 15 beaches in East Sussex based on measures of microbiological, physical and chemical parameters. Samples of bathing water are taken at regular intervals during the bathing season, covering the period from mid-May to the end of September. All relevant beaches in the UK have complied with the mandatory standard set out in the Directive since 2000.

River quality is estimated annually by the Environment Agency using a survey that measures four aspects of river quality: biology, chemistry, nutrients and aesthetic quality. The biological quality of rivers in East Sussex is mostly 'fairly good' to 'good'. However, a growing population will place extra demands on sewerage and wastewater treatment infrastructure and waters receiving effluent.

Biological quality of rivers in East Sussex, 1995 to 2006



• Water resources

About 70% of water supplies in our region are taken from underground sources, with the remainder coming from rivers and storage reservoirs. We are using 50% more water than 25 years ago due to the increased use of washing machines and dishwashers, people taking more baths and a growing interest in leisure gardening. The South East of England has some of the highest per capita consumption values in the UK, with demand close to exceeding currently available sustainable supply. The projected increase in the number of households in East Sussex will increase the pressure on this limited resource, as will the effects of climate change.

Sustainable use of natural resources is a key objective of the South East Plan. The water companies operating in East Sussex have put forward plans to 2035 to manage water demand, for instance by improving water efficiency in new and existing homes and businesses, and provide new water resources.

• Biodiversity

Biodiversity encompasses the whole variety of life on Earth, namely all plants and animals and the complex ecosystems of which they are a part. Biodiversity brings benefits to health and the local economy, for example providing recreation and education resources for people of all ages, which help to attract significant numbers of visitors to East Sussex.

Securing a healthy, resilient, productive and diverse natural environment is a government priority. The South East England Biodiversity Forum has identified biodiversity targets which focus on particularly important habitats, such as Ashdown Forest. The County has received national and international recognition for its countryside, bird habitats, fisheries, sites of special scientific interest and coastline.

The current state of biodiversity in East Sussex shows both positive and negative trends. For example, 97% of Sites of Special Scientific Interest (SSSIs) in East Sussex are in favourable or recovering condition and the number of Sites of Nature Conservation Importance in positive management has increased by 7% between 2008-9 and 2009-10. However, some species have seen a significant decline. For instance, woodland birds have decreased by approximately 50% since 1994 and woodland butterflies by two thirds in the last two decades, probably reflecting the neglect and inappropriate management of woodlands.

Opportunities to improve biodiversity include access to the national Environmental Stewardship Scheme. This is available to many landowners in East Sussex and can provide stability of income for rural businesses, landowners and farmers as well as providing opportunities to maintain the landscape, improve habitats for wildlife and reduce the risk of flooding and erosion. The scheme currently brings in about £4.5 million

to East Sussex each year, yet covers 58% of the county compared with a coverage of 67% across England, despite a significant proportion of the County being eligible for the scheme.

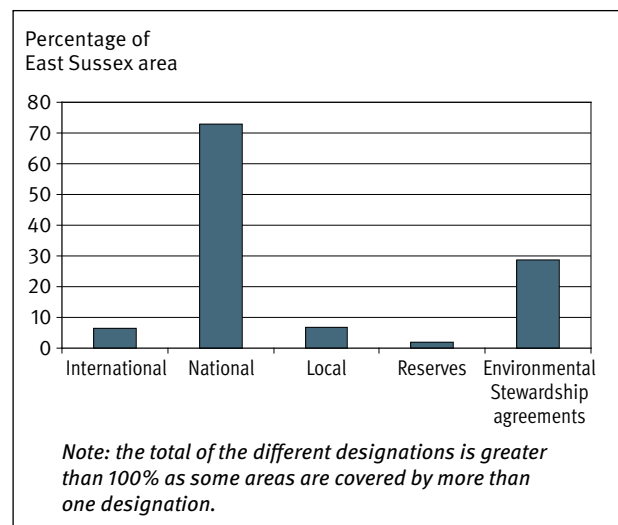
- **Open spaces**

Access to natural green space provides an opportunity for residents and visitors to enjoy the environment and lead healthier, active lifestyles. The provision of land open to the public, and the assessment of its sufficiency, is a complex picture. Borough and district councils are required to set out the open space needs for their area as part of their land use planning process, whilst provision of open space is by a range of public and private sector organisations as well as individuals.

The draft Environment Strategy for East Sussex sets a target to provide approximately 90% of the population with access to a 500 hectare open space within 10km of where they live, by developing the Pebsham Countryside Park. This provides greater access for the public to open spaces between Bexhill and Hastings. A partnership has been established between ESCC, Hastings Borough Council and Rother District Council to develop the park.

A key area of open space is the new South Downs National Park, which replaces the Sussex Downs Area of Outstanding Natural Beauty (AONB). The National Park is over 1,600 square kilometres and stretches 100 miles from the edge of Winchester to Beachy Head. The South Downs National Park Authority's key duties are to conserve and enhance the natural beauty, wildlife and cultural heritage of the area, and to promote opportunities for the understanding and enjoyment of the Park's special qualities.

Percentage of East Sussex covered by ecological and landscape designations



Transport

- **The third Local Transport Plan (LTP3)**

The County Council has developed its third Local Transport Plan (LTP3) 2011-2026, which sets out the Council's future direction for transport in East Sussex. It will be supported by a series of short term implementation plans. These will outline the transport measures and initiatives that will be delivered in the county, and will be refreshed annually. LTP3 is closely aligned to the development of the district and borough Local Development Framework Core Strategies, that will ensure that the location of future development is supported by either existing, or a new, transport infrastructure. The focus for this will be in the priority planning areas of Hastings/Bexhill, Eastbourne/South Wealden, Newhaven and Uckfield.

- **Continued reduction in traffic growth**

The level of traffic on the county's roads (measured by the number of kilometres travelled by all vehicles) reduced from 4,430 million vehicle kilometres in 2008 to 4,360

million vehicle kilometres in 2009. Overall this means that since 2003 traffic has only grown by 1.25%. (*Data referring to vehicle kilometres travelled by all vehicles at county level for 2010 was not available at the time of publishing.*)

Traffic mileage monitoring in the county from 2000 demonstrates that traffic levels have increased annually, with a peak in 2007. Since 2007 a reduction in traffic has been recorded. This can almost certainly be attributed to the country's wider economic situation, with a continued increase in the price of fuel in recent years, resulting in reduced car use. Other factors include the rise in access to faster broadband, supporting more homeworking and home shopping.

As part of LTP1 and 2, local targets were also set to reduce the future rate of traffic growth in four main areas of the county – Eastbourne, Bexhill and Hastings, Lewes and southern coastal towns. There has been a reduction in vehicle kilometres in all four areas between 2009/10 and 2010/11. This reduction is also predominantly attributed to the adverse winter weather experienced by the county at the beginning and end of 2010, as well as the factors outlined above.

• Road safety

In 2010 the end of year figures demonstrated that the number of people either killed or seriously injured on roads in East Sussex decreased from 373 in 2009 to 319 in 2010. This is an overall reduction of 14.5%, with the lowest annual totals for all categories (fatal, killed and seriously injured and slights) recorded in the last 10 years.

In 2010 the number of children killed or seriously injured on roads in East Sussex decreased from 32 in 2009 to 26, one of the lowest annual totals recorded since 2001.

• Increased public transport use

The total number of bus passenger journeys in East Sussex increased in 2009/10 to 19.06 million. This was 891,000 more than in the previous year. The County Council has continued to fund the majority of bus services outside of the urban areas of Hastings, Bexhill and Eastbourne, thus ensuring that access to essential services is maintained. In this regard, accessibility as measured by the proportion of the total population within 30 minutes access of public (bus) transport, (for arrival at a key centre between 07.00 – 10.00 and for the return journey from that centre between 16.00 – 19.00) has remained unchanged between 2008/09 and 2009/10 at 71%.

• Road maintenance

The condition of the county's principal, non-principal and unclassified roads (measured by the proportion of these roads where structural maintenance should be considered) is improving. With the introduction of more planned maintenance and a reduction in reactive maintenance over time, work on the roads will be more predictable, and we should see a reduction in the frequent short term disruptions that have tended to occur in parts of the county.

We are placing much greater emphasis on maintenance of A, B and C class roads. These are more important in the county, and compared to neighbouring authorities we have the lowest percentage of dual carriageway, compared to the overall network length in the country.

A programme of highway surfacing schemes valued at over £23 million, which includes an extra £8.5 million in 2010/11 and 2011/12, is being carried out to bring the condition of our road network up to at least the national average. This will not only achieve a visible improvement in our road network, but will reduce costly reactive maintenance activities and represent better value for money.

• Accessibility

Accessibility is measured according to the proportion of the total population within 30 minutes access by public transport (bus) for an arrival at a key centre (for example, Seaford, Battle, Lewes) between 07:00am – 10:00am and for the return journey from that centre between 16:00pm – 19:00pm.

In 2009/10 over 70% of the total population were able to access a key centre in peak times. There is a variation between urban and rural areas; in the borough of Eastbourne the proportion of the total population in that area that can access a key centre is over 88% compared to 54% in the district of Rother.

The County Council is currently exploring other methods of measuring accessibility, particularly relating to access to key services including employment and healthcare.

Improving accessibility and enhancing social inclusion is one of the key objectives for LTP3. Measures to improve accessibility will be considered, as part of LTP3 along with the importance of partnership working with other departments and agencies. This will ensure that sustainable transport opportunities are provided that are affordable, accessible and attractive to everyone.

• Transport initiatives

The County Council has embarked on a number of initiatives to improve access to information about travel and transport in the county. These have included:

- re-launching the TravelChoice sustainable transport website with more comprehensive information and easier access to the car sharing database;
- an easy to navigate public transport interactive map, with access to all county bus routes and relevant timetable information;
- community transport web pages which include contact information for community transport operators in the county;
- a county wide bus stop review, encompassing 1,500 bus stops and including improvements to signage and information; and
- provision of a texting service to allow passengers to access bus timetable information, using codes clearly displayed on bus stop signage.

• Newhaven Port activity

In 2009 there was a wholesale decline in activity at Newhaven Port. The number of passengers travelling through the port declined by 14% to 244,000 (a drop of 40,000). Passenger vehicles decreased by 23%, from 99,000 to 76,000. Freight handled also declined by 39% to 861,000 tonnes during the same period. Such low levels have not been recorded since 2000.

• Fewer flights

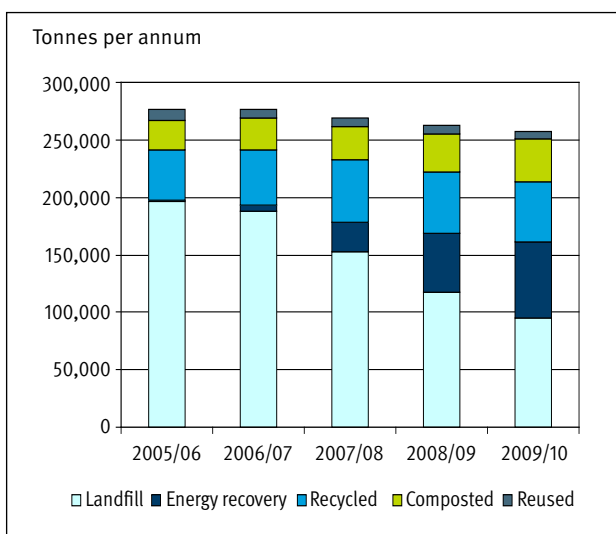
In 2010, around 31.3 million passengers used Gatwick Airport down from around 32.3 million the year before. This continues the decline from the 2007 high. The number of flights leaving from Gatwick in 2010 was 241,000 which is a 4.4% decline on the previous year, continuing the declining trend since 2007.

The amount of freight handled at Gatwick increased by 29,000 tonnes to 104,000 tonnes in 2010. Although this is a 39% increase from 2009 it is still 3.7% less than the 2008 figure. Freight handling has gone from 171,000 tonnes in 2007 to 75,000 tonnes in 2009. Whether the jump in 2010 is the start of a turnaround, or an anomaly in the decreasing trend (from the high of 319,000 tonnes in 2000) remains to be seen.

• Waste

In 2009/10 approximately 257,500 tonnes of municipal waste were produced in East Sussex. This is mainly household waste plus some trade waste, street sweepings, and parks and gardens waste collected by local authorities. The amount of municipal waste produced in East Sussex has declined in recent years as shown below.

Municipal waste tonnes per annum, 2005/06 – 2009/10



This may be due to the economic downturn, as well as local and national campaigns aimed at reducing waste and a wider awareness of the need to minimise waste.

However, municipal waste is estimated to comprise only 20% of the total waste produced in the county. Commercial and industrial waste comprises around 20%, while construction and demolition waste makes up around 60%. However, data is scarce for these waste streams, so the figures are only estimates.

There has also been a considerable reduction in the amount of municipal waste going to landfill, and a corresponding increase in levels of recycling, composting and energy recovery from waste. In 2009/10 only 37% of municipal waste was sent to landfill compared with 74% in 2004/05. This

figure is expected to decrease sharply once the Newhaven Energy Recovery Facility is complete.

There is only one landfill site remaining within East Sussex, located at Pebsham, and this is expected to reach capacity within three years. This lack of capacity means significant quantities of residual waste are currently being exported from East Sussex to surrounding counties.

• Minerals

Supplies of minerals in East Sussex are

- taken from the ground;
- recycled to be used again;
- dredged from the sea; and
- imported by sea.

Minerals in East Sussex are often found in environmentally sensitive areas such as the South Downs National Park. The county has to make sure that enough mineral (including sand and gravel) is available for development in the area and that other development does not prevent access to these minerals in the future.

There is one small active building sand extraction site in the west of the county. Marine dredging and importing has been reasonably stable in recent years. There is a limited amount of information available about recycled aggregates. However, around 370,000 tonnes was produced in 2003 (this includes sites within Brighton & Hove).

There are several sites producing clay tiles and bricks, and these have been producing more clay in recent years. There are no active chalk quarries in the county and this is not likely to change in the immediate future as much of the chalk is within the newly designated South Downs National Park. Gypsum is mined and processed at Brightling and Robertsbridge. There is continued demand for natural gypsum, importation of man-made gypsum and reprocessing of plasterboard.

Research and Information

Keeping you informed about East Sussex

The Council's Research and Information Team supports the strategic planning activities of the Economy, Transport and Environment Department and provides information and advice to help plan and review services across East Sussex.

The Research and Information Team has developed the East Sussex in Figures (ESiF) 'data observatory' to transform the way everyone can get access to and share detailed information about the county and its communities. ESiF responds to the growing needs of local authorities and their strategic partners, with reliable and up-to-date information on many different topics to help develop, monitor and review community strategies and other important service plans for improving social, economic and environmental wellbeing in East Sussex.

ESiF is very flexible and makes it easy for you to get the information you need, just as you want it – as a table, chart or map for the particular time periods and places you are interested in. For more information, visit eastsussexinfigures.org.uk or contact the ESiF co-ordinator, Tim Carpenter (details below).

If you have any specific questions or need specific information about East Sussex, please get in touch with any member of the Research and Information Team (their contact details are below).

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