County Hall

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18 March 2019

Dear Member,

Performance and Finance Select Committee - Wednesday, 20 March 2019

Please find enclosed the following document for the meeting of the Performance and Finance Select Committee on Wednesday, 20 March 2019. Hard copies will be tabled for Members on the day.

Agenda No Item

5. Total Performance Monitor as at end of December 2018 (Pages 3 - 14)

Appendix 5 – Presentation slides

Yours sincerely

Tony Kershaw Director of Law and Assurance

To all members of the Performance and Finance Select Committee

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Performance Measures - Economy

Performance and Finance Select Committee

Insight and Intelligence Team Wednesday 20th March



THE WEST SUSSEX WAY

West Sussex Performance Dashboard -– Prosperous Place

A great place to live, visit and work

 Economic Growth - Increasing GVA per head <u>https://public.tableau.com/views/GVA_1/GVA?:embed=y&:showVizHome=no</u>

A place that provides opportunity for all

- Economically active employment rate
 https://public.tableau.com/views/EconomicallyActive/EconomicallyActive?:embed=y&:showVizHome=no
- Average gross weekly earnings –full time workers resident in West Sussex https://public.tableau.com/views/ASHE/ASHE?:embed=y&:showVizHome=no

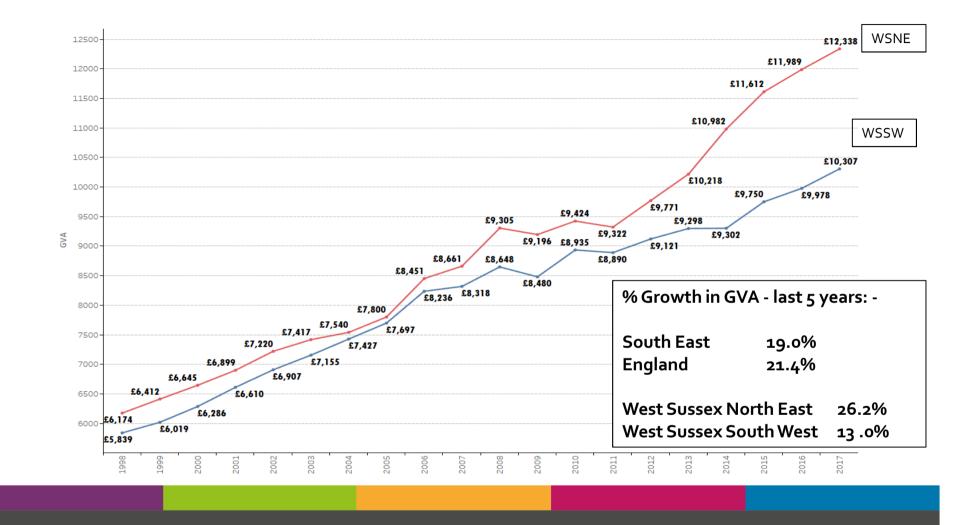
A place where businesses thrive

- Business start-ups
 https://public.tableau.com/views/BusinessStartups/BusinessStartups?:embed=y&:showVizHome=no
- Business survival and retention
 https://public.tableau.com/views/BusinessSurvival/BusinessSurvivalRates?:embed=y&:showVizHome=no



THE WEST SUSSEX WAY

GVA – all industries West Sussex Areas (£m)





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Agenda Item 5



West Sussex – Gross Value Added



GVA - Difference between WSNE & WSSW since 1998

GVA in the South East 2017 (£m)

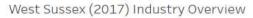


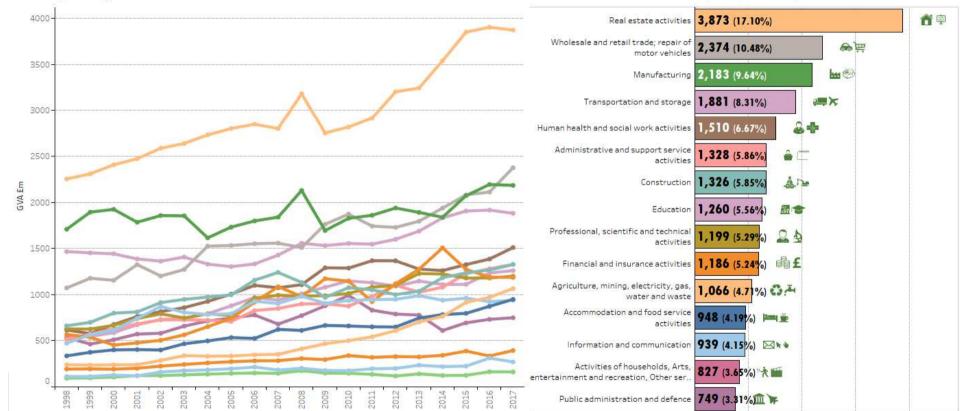
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West Sussex GVA (balanced approach)

Select Area West Sussex Adur Arun Cruckerse	Chichester Horsham	Total GVA £22,645m
Chichester Crawley Horsham Mid Sussex Worthing	© OpenStreetMap contributors	Select Year 2017

Industry Change in GVA since 1998





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Crawley GVA (balanced approach)



Industry Change in GVA since 1998

1600-

1400

1200

1000

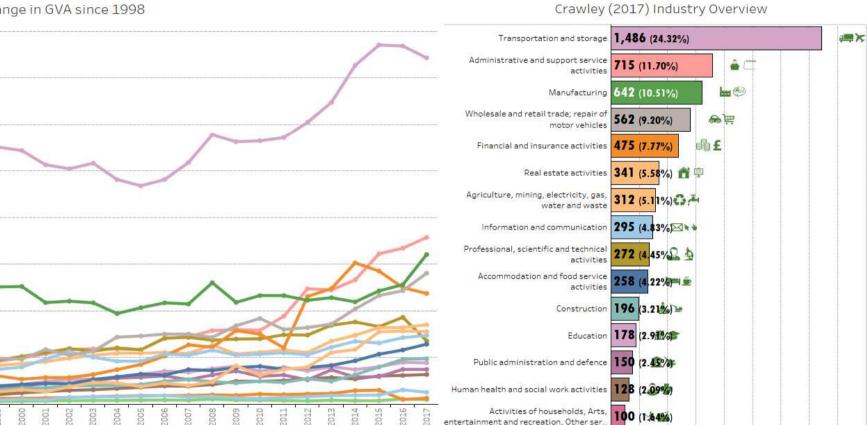
800

600

400

200

GVA £m



2017

entertainment and recreation, Other ser.

2014

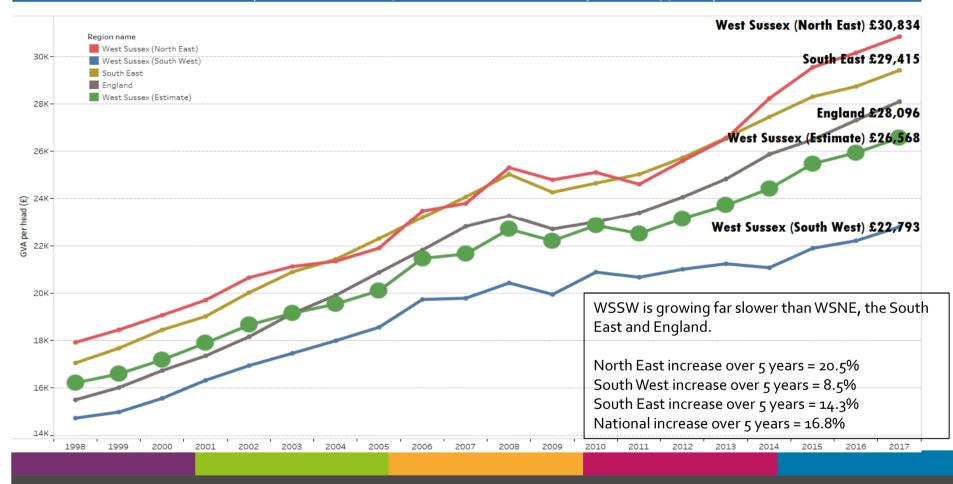
THE WEST SUSSEX WAY

100 (1.64%)



Economic Growth – GVA per Head

North/South divide in GVA per head across West Sussex (balanced approach)





THE WEST SUSSEX WAY

West Sussex – GVA per Head vs GVA per Job (2017)

in a start	2017 GVA per	nead		2017 GVA per filled Job				
Milton Keynes			£49,516	Milton Keynes			£69,380	
Berkshire		£41,727		Berkshire			£69,135	
West Surrey	West Surrey £35,68			East Surrey	£65,12		£65,127	
Oxfordshire		£34,016		West Surrey		£64,278		
North Hampshire		£31,167		Buckinghamshire CC	£61,048		48	
East Surrey		£31,105		North Hampshire	£59,743			
West Sussex (North East)		£30,834		South East	£57,407			
Buckinghamshire CC	-	£30,131	Oxfordshire £		£57,125			
South East	uth East £29,415			West Kent	£57,051			
West Kent	Kent £29,057			England	£55,176			
Central Hampshire		£29,053		Central Hampshire		£54,812		
England	England £28,096			South Hampshire	£	54,406		
Brighton and Hove	Brighton and Hove £27,			West Sussex (North East)	£5	3,893		
Southampton	£2	7,502		Southampton	£5	3,845		
Portsmouth £24		6,689		Medway	£52,464			
Mid Kent	£24,296	-		Kent <mark>T</mark> hames Gateway	£50,748			
South Hamp <mark>shire</mark>	£23,693	-	head – change	Vest Sussex (South West)	£50,680	GVA per	job – change	
West Sussex (South West)	£22,793	over	last 5 years	Brighton and Hove	£48,934	over	ast 5 years	
Kent Thames Gateway		Area	% change	Isle of Wight	£48,114	Area	% change	
Isle of Wight		WSNE	20.5%	East Kent	£48,111		-	
East Sussex CC		South East	14.3%	Portsmouth	£47,955	WSNE	13.6%	
East Kent	£19,258	England	16.8%	East Sussex CC	£47,427	South East	11.2%	
Medway	£19,205	WSSW	8.5%	Mid Kent	£46,759	England	122%	
						WSSW	7.3%	

2017 GVA per head

2017 GVA per filled job



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West Sussex – Employee Jobs and Businesses

West Sussex Employee Jobs

7,175

Sector		
Wholesale and retail trade; repair of motor vehicles and motorcycles	65,000 17.00%	
Human health and social work activities	45,000	
Administrative and support service activities	39,000	
Education	32,000 8.37%	
Transportation and storage	30,000 7.85%	
Manufacturing	29,000 7.58%	· · · · · · · · · · · · · · · · · · ·
Accommodation and food service activities	29,000 7.58%	
Professional, scientific and technical activities	24,000 🔬 🛓	
Construction	15,000 4.18%	
Information and communication	14,000 3.66%	
Financial and insurance activities	12,000 3.14%	
Public administration and defence; compulsory social security	12,000 3.14%	
Arts, entertainment and recreation	10,000 2.62% ****	1
Primary and utilities	9,350 2.45%	98 2.34
Other service activities	8,000	930 2.22
Real estate activities	8,000	260 0.62%
	ОК 20К 40К 60К 80К 100К Employee Jobs	ОК 1К

0 \$ 17.11% 6,750 16.10% 2 m 5,060 AD 12 07% 3,810 â Contrast of the second 9.09% 3,375 8.05% 2,800 6.68% * 2,220 5.29% 2,205 5.26% 2,045 Han (9) 4.88% 1,715 GA 4.09% 1,410 合學 3.36% 1,195 2.85% 080 34% 30 di £ 22% ÎIII 10K 4K 5K 6K 8K 9K 38 7K Total Businesses

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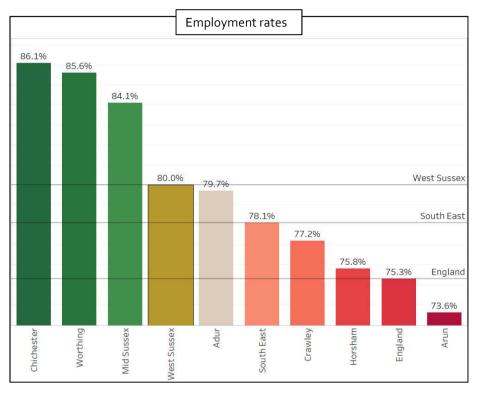
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west susse> council

A Place that Provides Opportunity for All

- Gross weekly pay for full time workers living in West Sussex
- Employment rate of 16-64 year olds

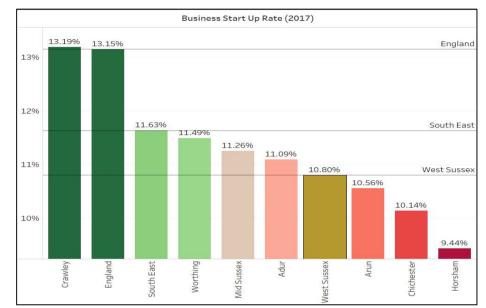


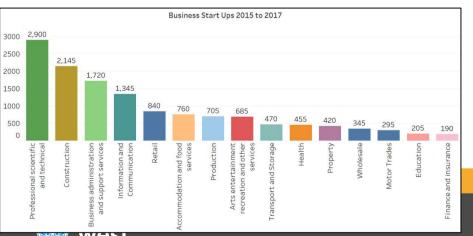


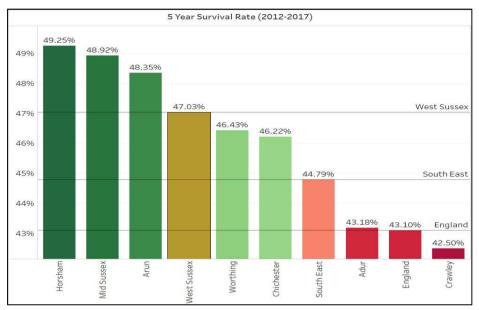
west sussex county council

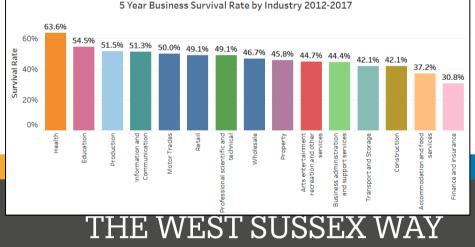
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A Place Where Businesses Thrive











Summary

- West Sussex is generally a strong performing economy, but underperforms in some areas, including when compared to the strongest economies in the South East
- Significant variation in economic performance across the County
- ➢ GVA per head level of West Sussex is below national and regional average
- The gap in GVA growth between the two sub areas is widening
- Employment growth performs well over recent years (2015-2017)
- Business growth lower than regional and national average, but pockets where growth has performed well
- Good rates of economic activity and participation
- > Workplace pay is below residence based pay with the exception of Crawley
- Business start up rate lower than national and regional rate, stronger survival rate



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