

Employment Trends in West Sussex

Business Register and Employment Service (BRES) Analysis Headline Data Summary 2015

Source

The Business Register and Employment Survey (BRES) is the official source of employee and employment estimates by detailed geography and industry. The survey collected employment information from businesses across the whole of the UK economy. However, BRES data does not record figures for the Agriculture sector. The survey data is available from Nomis.

Employment in 2015

- There were a total of 359,100 employees working in West Sussex in 2015
- There were 310,900 employees (86.6%) who work in the private sector, West Sussex has a higher proportion of private sector employees compared to South East (84.6%), as well as England (82.6%).
- There were 48,200 employees (13.4%) who work in the public sector; this is lower than South East average (15.3%) and the average for England (17.3%).
- Full time employees makes up just over two-thirds (67%) of local employees in West Sussex. This is slightly lower than South East (68.7%) and England (69.5%). Part time employees represent one third (33%); which is slightly higher in South East (31.3%) and England (31%).
- The total number for those in employment is 369,000 which accounts for an additional 9,800 people. BRES guidance suggests that these are likely to include employees plus the number of working owners. BRES therefore includes self-employed workers as long as they are registered for VAT or Pay-As-You-Earn (PAYE) schemes. Self-employed people not registered for these, along with HM Forces and Government Supported trainees are excluded.

Employment Sectors

- There are five sectors that account for almost 6 out of 10 (56.8%) employee jobs, these include Wholesale and retail (18.3%), Human health and social work (12.8%), Administrative and support service activities (8.9%), Accommodation and food services (8.4%) and Education (8.4%).
- Compared with England as a whole, based in the location quotients table, West Sussex has high and low employment concentrations in the following sectors:

High Employment Concentration	Low Employment Concentration
Wholesale and retail	Primary and utilities
Transportation and storage	Manufacturing
Accommodation and food service	Construction
Real estate activities	Information and communication
	Professional, scientific and technical
	Public administration and defence
	Education

Employment Change 2009-2015

- There were 24,500 (7.3%) more employees in West Sussex in 2015 than there had been in 2009.
- Public sector job losses (-10,100) were more than offset by private sector job gains (+34,600), resulting in an overall net increase in employee jobs. The number of people employed in the public sector fell by -17.3%, this is higher compared to South East, which fell by -10.1% but more than England, which fell by -11%.
- There was an increase in the number of part-time employees by 12,400 or 11.6%, which is higher the South East average of 6.3% and much higher than the national average of 3.1%.
- There was an increase in the number of full-time employees by 12,200 or 5.3% which is lower than the South East average of 9.3% and the national average of 10%. The employee job losses and gains for West Sussex were concentrated in the following sectors:

Main Employee Job Gains		Main Employee Job Losses	
Wholesale and Retail	+8000	Public administration and defence	-5000
Accommodation and food services	+6000	Construction	-3000
Business administration and support services	+6000	Manufacturing	-1000

Sector change in West Sussex 2009-2015

From 2009 to 2015 the wholesale and retail sector grew the largest by 8000 more employees (13.8%) since 2010 this sector has grown year on year, conversely the public administration and defence sector fell the most by -5000 employees and -31.1%. Overall West Sussex has grown by an additional 24,000 or 7.2%.

Sector	2009	2010	2011	2012	2013	2014	2015	Number	%
Primary utilities (A, B, D + E)	4,200	4,900	5,000	5,200	4,900	5,800	5,000	800	19.0%
Manufacturing	26,000	27,000	27,000	24,000	25,000	25,000	25,000	-1,000	-3.8%
Construction	17,000	15,000	13,000	12,000	13,000	14,000	14,000	-3,000	-17.6%
Wholesale and retail trade, repair of motor vehicles and motorcycles	58,000	58,000	60,000	61,000	62,000	63,000	66,000	8,000	13.8%
Transport & storage (inc postal)	25,000	26,000	26,000	27,000	27,000	27,000	27,000	2,000	8.0%
Accommodation & food services	24,000	27,000	28,000	25,000	28,000	29,000	30,000	6,000	25.0%
Information & communication	12,000	12,000	12,000	11,000	12,000	11,000	14,000	2,000	16.7%
Financial & insurance	13,000	14,000	12,000	13,000	14,000	14,000	13,000	0	0.0%
Property	5,000	6,000	5,000	6,000	5,000	6,000	7,000	2,000	40.0%
Professional, scientific & technical	22,000	22,000	21,000	23,000	22,000	24,000	24,000	2,000	9.1%
Business administration & support services	26,000	27,000	31,000	33,000	31,000	33,000	32,000	6,000	23.1%
Public administration & defence	16,000	19,000	14,000	14,000	13,000	11,000	11,000	-5,000	-31.3%
Education	28,000	29,000	28,000	29,000	32,000	29,000	30,000	2,000	7.1%
Health	44,000	44,000	46,000	46,000	45,000	43,000	46,000	2,000	4.5%
Arts, entertainment, recreation & other services	14,000	15,000	15,000	16,000	16,000	15,000	16,000	2,000	14.3%
Column Total	334,200	345,900	343,000	345,200	349,900	349,800	360,000	25,800	7.7%

Top three growth and declining sectors

The top three growth and declining sectors from 2009-15 for West Sussex can be further explained by using more detailed industrial classifications (*five digit classifications) so that greater detail around which sectors have changed over time is seen. The retail, accommodation and food services, and business administration and support services sectors have seen the highest amount of growth during this time period, whilst public administration and defence, construction and manufacturing sectors have had the greatest decline in employment over this period.

Growth:

The highest area of growth found in the retail sector is within 'non-specialised stores with food, beverages or tobacco' with a growth of 2000. The accommodation and food sector had the highest growth in 'other food service activities' with a growth of 2400 and the business admin and support services had the highest growth in 'general cleaning of buildings', with a growth of 2000.

Top 3 growth sectors	5 digit classification	2009	2015	Growth
Retail	47110: Retail sale in non-specialised stores with food, beverages or tobacco predominating	13000	15000	2000
	47190: Other retail sale in non-specialised stores	2500	3500	1000
	47910: Retail sale via mail order houses or via Internet	500	2000	1500
Accommodation and food services	55100: Hotels and similar accommodation	3500	4500	1000
	56101: Licensed restaurants	4000	6000	2000
	56102: Unlicensed restaurants and cafes	2500	3500	1000
	56290: Other food service activities	100	2500	2400
Business admin and support services	81210: General cleaning of buildings	2500	4500	2000
	81100: Combined facilities support activities	3500	5000	1500
	78109: Activities of employment placement agencies (other than motion picture, television and other theatrical casting) nec	1800	3000	1200

- 'Five digit classification' is the lowest level of the 2007 Standard Industrial Classifications (SIC) which are used for classifying business establishments and other statistical units by the type of economic activity in which they are

Decline:

The greatest loss in the public administration and defence sector fell in 'general public administration activities', with a loss of -4000 employees. However, within this period there have been substantial cuts in the local government budget, which is likely to have caused this significant loss of employees.

The construction sector suffered the greatest loss of employees is within 'construction of other civil engineering projects' with a loss of -1200. Within the manufacturing sector 'manufacture of pharmaceutical activities' had the greatest loss with -800 employees.

Top 3 declining sectors	5 digit classification	2009	2015	Decline
Public administration and defence	84110: General public administration activities	10000	6000	-4000
	84130: Regulation of and contribution to more efficient operation of businesses	600	100	-500
	84240: Public order and safety activities	2500	2000	-500
Construction	41100: Development of building projects	1300	700	-600
	42990: Construction of other civil engineering projects nec	2500	1300	-1200
	43999: Specialised construction activities (other than scaffold erection) nec	1300	800	-500
Manufacturing	21200: Manufacture of pharmaceutical preparations	1800	1000	-800
	26511: Manufacture of electronic instruments and appliances for measuring, testing, and navigation, except industrial process control equipment	1500	1000	-500
	28132: Manufacture of pumps	800	100	-700

District and Borough Sector Change 2009-15

All district and borough areas are shown below with the change in number and percentage of employees by sector. The top and bottom three are highlighted to show positive growth or negative decline. Five of the seven areas all increased positively in the wholesale and retail trade and business administration and support services sectors. Conversely four sectors all showed decline in the construction and public administration and defence sectors.

Sector change 2009-2015 by district and borough	Adur		Arun		Chichester		Crawley		Horsham		Mid Sussex		Worthing	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Primary utilities (A, B, D + E)	-100	-21.1%	60	19.4%	175	50.0%	-475	-29.2%	400	65.6%	225	54.9%	365	51.4%
Manufacturing	250	11.1%	500	16.7%	1000	25.0%	-1500	-25.0%	-500	-11.1%	500	16.7%	500	20.0%
Construction	-500	-33.3%	-250	-11.1%	-250	-10.0%	0	0.0%	-1000	-25.0%	-500	-16.7%	0	0.0%
Wholesale and retail trade, repair of motor vehicles and motorcycles	350	8.9%	1,000	12.5%	600	6.9%	1,000	8.3%	1,000	10.0%	2,000	20.0%	1,000	14.3%
Transport & storage (inc postal)	300	100.0%	0	0.0%	0	0.0%	2,000	10.5%	-250	-20.0%	250	20.0%	250	25.0%
Accommodation & food services	250	25.0%	500	11.1%	1,500	33.3%	2,000	40.0%	500	16.7%	0	0.0%	0	0.0%
Information & communication	850	212.5%	200	25.0%	250	16.7%	500	16.7%	750	33.3%	-250	-10.0%	-500	-25.0%
Financial & insurance	150	33.3%	0	0.0%	500	50.0%	-500	-14.3%	0	0.0%	0	0.0%	-250	-11.1%
Property	75	50.0%	200	33.3%	750	60.0%	150	50.0%	0	0.0%	250	25.0%	400	66.7%
Professional, scientific & technical	-250	-16.7%	250	14.3%	0	0.0%	0	0.0%	1,000	25.0%	500	12.5%	-500	-16.7%
Business administration & support services	600	66.7%	0	0.0%	1,000	28.6%	2,000	18.2%	1,000	33.3%	-500	-16.7%	1,000	50.0%
Public administration & defence	-100	-14.3%	-250	-16.7%	-2,500	-41.7%	-500	-20.0%	-100	-10.0%	-700	-46.7%	-500	-20.0%
Education	250	16.7%	0	0.0%	1,000	20.0%	500	12.5%	0	0.0%	1,000	20.0%	0	0.0%
Health	-250	-10.0%	1,000	16.7%	0	0.0%	500	14.3%	500	11.1%	1,000	12.5%	0	0.0%
Arts, entertainment, recreation & other services	100	14.3%	100	5.1%	500	16.7%	0	0.0%	250	8.3%	-100	-3.6%	500	38.4%
Total	2,000	11.1%	4,000	10.2%	4000	7.4%	6000	7.6%	4000	8.3%	4000	7.5%	2000	4.7%

Change 2009-2015 Scorecard

Each upper tier and unitary authority area is ranked in the South East (1-19), with 1 indicating the authority with the most amount of growth and 19 indicating the lowest amount of growth and in some cases a reduction. The scorecard indicates performance with a traffic light system, with green showing the highest amount of growth and red the least amount of growth or indeed a decline in employment.

- West Sussex is ranked 6th out of the 19 authorities in the South East region for employee growth between 2009 and 2015.
- West Sussex is ranked 7th out of 19 authorities in the South East region for the growth of full-time employees from 2009-2015.
- West Sussex is ranked 2nd out of 19 authorities in the South East for the growth of part-time employees from 2009-2015.
- West Sussex is ranked 16th out of 19 authorities' areas in the South East for the growth of public sector employees with a loss of -10,100.
- West Sussex is ranked 5TH out of 19 authorities in the South East for the growth of private sector employees, with an additional 34,600.

Employment Type	Rank (1-19) - where 1 is the highest and 19 the lowest	Employment Type	Rank (1-19) - where 1 is the highest and 19 the lowest
All Employees	6		
Full-Time Employees	7	Private Sector Employees	5
Part-time Employees	2	Public Sector Employees	16

Percentage of Employees in Employment by Sector 2015

The table below shows the percentage of employees by sector for each district and borough area in West Sussex, as well as the county averages. The sectors highlighted are the top five in those areas. The table also shows the total number of employees working in the private and public sectors.

Percentage of Employees in Employment by Sector 2015 - Industry	Adur	Arun	Chichester	Crawley	Horsham	Mid Sussex	Worthing	West Sussex
Primary & Utilities (A,B,D & E)	1.9%	0.9%	0.9%	1.2%	2.0%	1.1%	2.3%	1.4%
C: Manufacturing	12.4%	8.1%	8.7%	5.3%	7.7%	6.2%	6.7%	7.0%
F: Construction	5.0%	4.7%	3.9%	2.4%	5.7%	4.4%	2.8%	3.9%
G: Wholesale and retail trade; repair of motor vehicles and motorcycles	21.1%	19.6%	16.0%	15.4%	20.6%	21.0%	17.5%	18.3%
H: Transportation and storage	3.0%	2.9%	1.7%	24.8%	1.9%	2.6%	2.8%	7.5%
I: Accommodation and food service activities	6.2%	11.6%	10.4%	8.3%	6.7%	7.0%	5.0%	8.4%
J: Information and communication	6.2%	2.3%	3.0%	4.1%	5.7%	4.0%	3.4%	3.9%
K: Financial and insurance activities	3.0%	1.4%	2.6%	3.5%	3.4%	6.2%	4.5%	3.6%
L: Real estate activities	1.1%	1.9%	3.5%	0.5%	2.4%	2.2%	2.2%	1.9%
M: Professional, scientific and technical activities	6.2%	4.7%	6.1%	5.3%	9.6%	7.9%	5.6%	6.7%
N: Administrative and support service activities	7.5%	7.0%	7.8%	15.4%	7.7%	4.4%	6.7%	8.9%
O: Public administration and defence; compulsory social security	3.0%	2.9%	6.1%	2.4%	1.7%	1.4%	4.5%	3.1%
P: Education	8.7%	8.1%	10.4%	5.3%	9.6%	10.6%	7.8%	8.4%
Q: Human health and social work activities	11.2%	16.3%	13.9%	4.7%	9.6%	15.8%	24.6%	12.8%
Arts, entertainment, recreation & other services (R,S,T and U)	4.0%	4.7%	6.1%	2.1%	5.7%	4.4%	3.9%	4.5%
Total Number of Employees	20100	42900	57700	84600	52200	56800	44700	359100
Public Sector % Share	12.3	12.1	18.5	9.2	9	13.6	21.5	13.4
Private Sector % Share	87.7	87.9	81.5	90.8	91.0%	86.4	78.5	86.6

Percentage of Employees in Employment by Sector 2015 – with neighbouring authorities

The table below shows the percentage of employees by sector for neighbouring authorities, as well as the county averages. The sectors highlighted are the top five in those areas. The table also shows the total number of employees working in the private and public sectors. The wholesale and retail, education and human health and social work sectors all feature in the top five for neighboring authorities.

Percentage of Employees in Employment by Sector 2015 - Industry	West Sussex	Surrey	Hampshire	East Sussex	Brighton and Hove	South East	England
Primary & Utilities (A,B,D & E)	1.4%	1.9%	1.3%	0.9%	0.5%	2.0%	1.7%
C: Manufacturing	7.0%	4.3%	8.5%	6.2%	1.9%	6.2%	8.1%
F: Construction	3.9%	5.0%	5.4%	5.1%	2.6%	4.5%	4.5%
G: Wholesale and retail trade; repair of motor vehicles and motorcycles	18.3%	15.4%	16.9%	17.7%	13.8%	16.7%	15.8%
H: Transportation and storage	7.5%	3.0%	3.9%	2.5%	2.6%	4.4%	4.7%
I: Accommodation and food service activities	8.4%	7.0%	7.8%	10.1%	10.5%	7.3%	7.0%
J: Information and communication	3.9%	6.8%	6.4%	2.5%	6.0%	6.3%	4.4%
K: Financial and insurance activities	3.6%	3.7%	3.4%	2.2%	6.0%	2.9%	3.6%
L: Real estate activities	1.9%	1.8%	1.7%	2.0%	1.9%	1.7%	1.7%
M: Professional, scientific and technical activities	6.7%	12.5%	8.6%	6.2%	6.7%	9.0%	8.7%
N: Administrative and support service activities	8.9%	8.2%	7.3%	4.5%	7.5%	7.9%	9.1%
O: Public administration and defence; compulsory social security	3.1%	2.5%	3.4%	3.9%	3.7%	3.3%	4.1%
P: Education	8.4%	9.5%	9.8%	10.7%	12.7%	10.3%	9.2%
Q: Human health and social work activities	12.8%	12.7%	11.3%	19.6%	17.2%	12.6%	12.8%
Arts, entertainment, recreation & other services (R,S,T and U)	4.5%	5.7%	4.6%	5.1%	6.0%	4.7%	4.4%

Percentage of employees in Employment by Sector 2015 - West Sussex vs. neighbouring authorities

The table below replicates the above comparison with neighbouring authorities; however this compares sectors against each other to highlight differences of high or low level concentration.

The traffic light system shows red with a low level and green a high level of concentration. West Sussex has the highest concentration of wholesale and retail, transportation and storage and administrative and support services than local neighboring authorities. In contrast, the county has the lowest percentage of employees in the education and arts entertainment, recreation and other services sectors.

Percentage of Employees in Employment by Sector 2015 - Industry	West Sussex	Surrey	Hampshire	East Sussex	Brighton and Hove	South East	England
Primary & Utilities (A,B,D & E)	1.4%	1.9%	1.3%	0.9%	0.5%	2.0%	1.7%
C: Manufacturing	7.0%	4.3%	8.5%	6.2%	1.9%	6.2%	8.1%
F: Construction	3.9%	5.0%	5.4%	5.1%	2.6%	4.5%	4.5%
G: Wholesale and retail trade; repair of motor vehicles and motorcycles	18.3%	15.4%	16.9%	17.7%	13.8%	16.7%	15.8%
H: Transportation and storage	7.5%	3.0%	3.9%	2.5%	2.6%	4.4%	4.7%
I: Accommodation and food service activities	8.4%	7.0%	7.8%	10.1%	10.5%	7.3%	7.0%
J: Information and communication	3.9%	6.8%	6.4%	2.5%	6.0%	6.3%	4.4%
K: Financial and insurance activities	3.6%	3.7%	3.4%	2.2%	6.0%	2.9%	3.6%
L: Real estate activities	1.9%	1.8%	1.7%	2.0%	1.9%	1.7%	1.7%
M: Professional, scientific and technical activities	6.7%	12.5%	8.6%	6.2%	6.7%	9.0%	8.7%
N: Administrative and support service activities	8.9%	8.2%	7.3%	4.5%	7.5%	7.9%	9.1%
O: Public administration and defence; compulsory social security	3.1%	2.5%	3.4%	3.9%	3.7%	3.3%	4.1%
P: Education	8.4%	9.5%	9.8%	10.7%	12.7%	10.3%	9.2%
Q: Human health and social work activities	12.8%	12.7%	11.3%	19.6%	17.2%	12.6%	12.8%
Arts, entertainment, recreation & other services (R,S,T and U)	4.5%	5.7%	4.6%	5.1%	6.0%	4.7%	4.4%
Total Number of Employees	359000	560000	591000	178000	134000	4041000	24867000
Public Sector % Share	13.4	12.1	13.9	17.4	18.1	15.4	17.4
Private Sector % Share	86.6	87.9	86.1	82.6	81.9	84.6	82.6

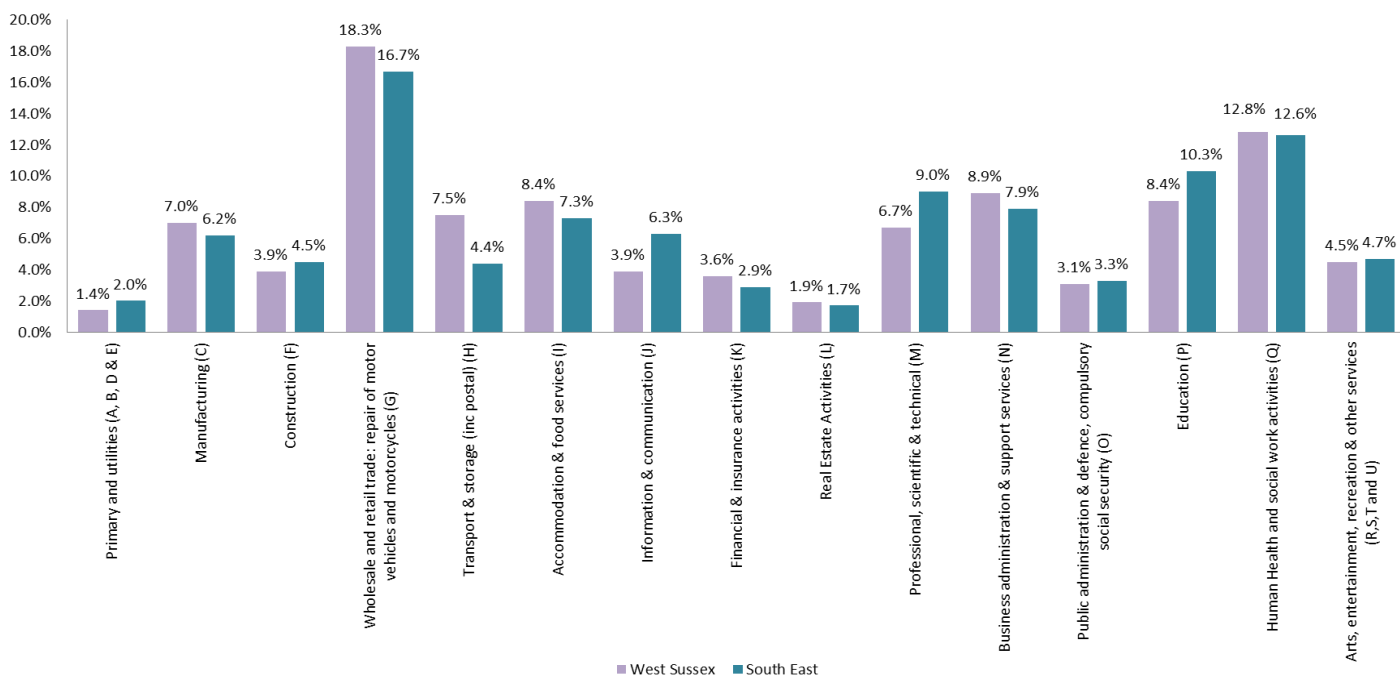
Sector strengths and weaknesses (location quotients) – West Sussex and South East

West Sussex and the South East show similar trends to make up of employment nationally, but there is under representation in the manufacturing and public administration and defence sectors, and represent in the wholesale and retail sector and both level the national average for the human health and social work sector.

Sector strengths and weakness in West Sussex - Location Quotients (England) BRES 2015		
	West Sussex	South East
Primary & Utilities (A,B,D,E)	0.8	1.2
C: Manufacturing	0.9	0.8
F: Construction	0.9	1.0
G: Wholesale and retail trade; repair of motor vehicles and motorcycles	1.2	1.1
H: Transportation and storage	1.6	0.9
I: Accommodation and food service activities	1.2	1.0
J: Information and communication	0.9	1.4
K: Financial and insurance activities	1.0	0.8
L: Real estate activities	1.1	1.0
M: Professional, scientific and technical activities	0.8	1.0
N: Administrative and support service activities	1.0	0.9
O: Public administration and defence; compulsory social security	0.8	0.8
P: Education	0.9	1.1
Q: Human health and social work activities	1.0	1.0
R: Arts, entertainment and recreation	1.0	1.1
NB - Farm Based agriculture excluded from BRES		
under representation of sector compared with England		
local concentration of sector compared with England		

West Sussex compared to South East by industry

West Sussex has a slightly higher percentage than the South East average in the manufacturing, wholesale and retail, transport and storage, accommodation and food, financial and insurance, business administration and support sectors.



Sector strengths and weaknesses (location quotients) – District and Boroughs in West Sussex

It is useful to understand local economic strengths by comparing the distribution of employment by sector in districts and boroughs with the national distribution. This is done using Location Quotients (LQ) Any LQ above 1.0 shows a local concentration and any below 1.0 shows an under representation.

Compared to the national averages West Sussex has an under representation in the primary and utilities, manufacturing construction, information and communication, professional and scientific and technical activities, public administration and defence and education sectors.

Sector strengths and weakness in West Sussex - Location Quotients (England) BRES 2015								
	Adur	Arun	Chichester	Crawley	Horsham	Mid Sussex	Worthing	West Sussex
Primary & Utilities (A,B,D,E)	1.1	0.5	0.5	0.7	1.2	0.6	1.4	0.8
C : Manufacturing	1.5	1.0	1.1	0.7	1.0	0.8	0.8	0.9
F : Construction	1.1	1.0	0.9	0.5	1.3	1.0	0.6	0.9
G : Wholesale and retail trade; repair of motor vehicles and motorcycles	1.3	1.2	1.0	1.0	1.3	1.3	1.1	1.2
H : Transportation and storage	0.6	0.6	0.4	5.3	0.4	0.6	0.6	1.6
I : Accommodation and food service activities	0.9	1.7	1.5	1.2	1.0	1.0	0.7	1.2
J : Information and communication	1.4	0.5	0.7	0.9	1.3	0.9	0.8	0.9
K : Financial and insurance activities	0.8	0.4	0.7	1.0	0.9	1.7	1.3	1.0
L : Real estate activities	0.6	1.1	2.1	0.3	1.4	1.3	1.3	1.1
M : Professional, scientific and technical activities	0.7	0.5	0.7	0.6	1.1	0.9	0.6	0.8
N : Administrative and support service activities	1.8	1.7	1.9	3.8	1.9	1.1	1.6	1.0
O : Public administration and defence; compulsory social security	0.7	0.7	1.5	0.6	0.4	0.3	1.1	0.8
P : Education	0.9	0.9	1.1	0.6	1.0	1.2	0.8	0.9
Q : Human health and social work activities	0.9	1.3	1.1	0.4	0.8	1.2	1.9	1.0
R : Arts, entertainment and recreation	0.9	1.1	1.4	0.5	1.3	1.0	0.9	1.0
NB - Farm Based agriculture excluded from BRES								
under representation of sector compared with England								
local concentration of sector compared with England								