State of the County 2016 - Focus on East Sussex

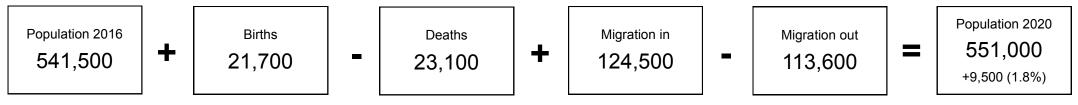


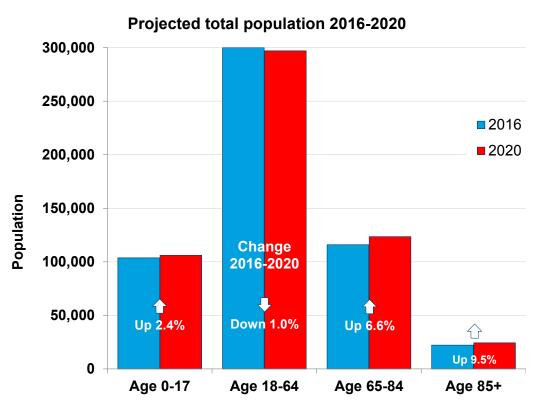
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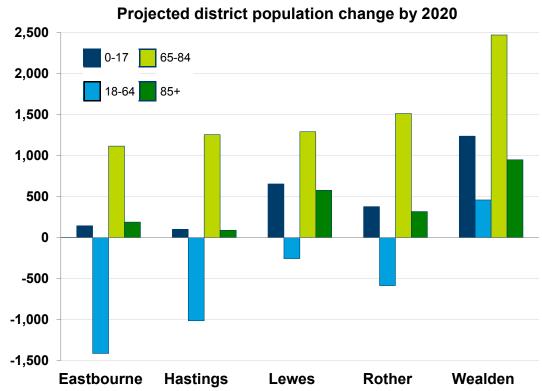








Age band	2016	2020	Actual change	% change
0-17	103,550	106,070	2,520	+2.4%
18-64	299,850	297,050	-2,800	-0.9%
65-84	115,900	123,540	7,640	+6.6%
85+	22,160	24,280	2,120	+9.6%
All people	541,470	550,950	9,480	+1.8%



Compared to 2016, by 2020 there will be:

- 9,500 more people living in East Sussex (+1.8%), with most growth among ages 65+
- 950 more people aged 85+ in Wealden, up 16%; but just 90 (3.6%) more in Hastings
- A small increase in child numbers, following the birth rate peak in 2010/11
- A small decrease in working age population (age 18-64)

Source: ESCC dwelling-led population projections, January 2016

Compared to 2016, by 2020 there will be:

- 250,700 households in the county, an increase of 3.3% from 242,700 in 2016; with the largest number of new households in Wealden, 3,300
- 3.1% increase in the number of one person households to 82,300

Housing need and supply

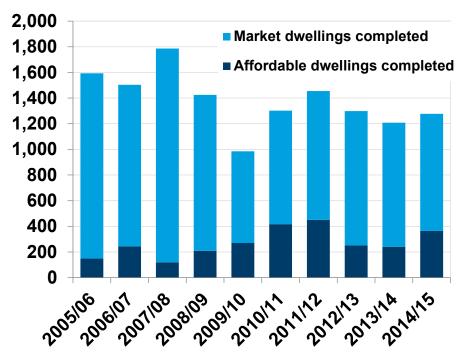
- East Sussex has 248,820 dwellings. 9,740 Local Authority and 16,770 Private Registered Provider
- 6,949 dwellings were vacant in 2015; a decrease of almost one quarter since 2005
- In 2014/15, 1,277 dwellings were completed of which 28% were affordable
- The average house price in January 2016 was £214,135, compared to £190,498 for England and Wales
- The average house price is 8.6 times the average full-time wage for those working in East Sussex and 7.9 times the average full-time wage for those living here
- Home ownership at 69.2% in 2011, highest in St. Marks, Bexhill at 91.3%, lowest in Central St. Leonards, Hastings at 26.7%
- 7,731 households in the county on local authority housing waiting lists in 2015
- 6.6% of households had fewer rooms than required, 8.5% in England and Wales and 7.5% in South East. Concentrations in urban coastal areas. 20% in Central St Leonards and over one third in parts of Devonshire ward, Eastbourne

Sources: Census 2011 and Department for Communities and Local Government

Note: Affordable housing includes housing for social rent, shared ownership, low cost home ownership and sub-market rent

Number of completed new dwellings in East Sussex

3

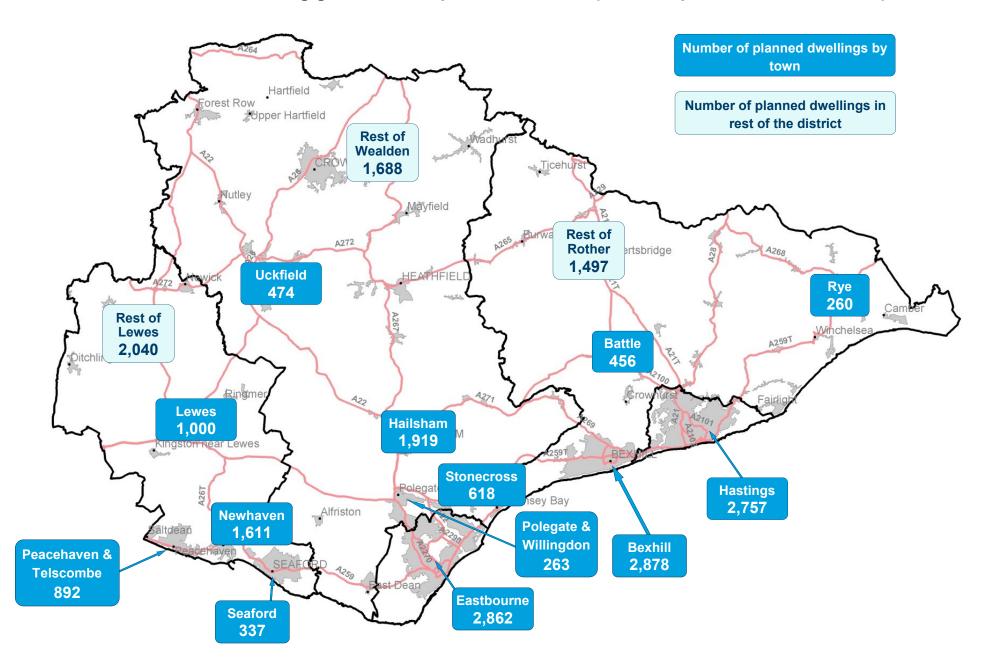


Source: ESCC On-line Housing Monitoring Database

Adopted Local Plans	Number of dwellings over plan period
Eastbourne: Core Strategy Local Plan, adopted February 2013	5,022 (2006-2027) 239 p.a.
Hastings: The Hastings Planning Strategy, adopted February 2014	3,400 (2011-2028) 200 p.a.
Lewes: Joint Core Strategy, adopted June 2016	6,900 (2010-2030) 345p.a.
Rother: Core Strategy, adopted September 2014	5,700 (2011-2028) 335 p.a.
Wealden: Core Strategy, adopted February 2013	9,440 (2006-2027) 450 p.a.
Long term proposed additional growth	
Wealden: Issues Options and Recommendations October 2015*	19,950 (2013-2037) 831 p.a.

^{*}Preferred option focuses development in South Wealden. However proposed development levels and distribution need to be tested to see if they are acceptable and deliverable including supporting infrastructure

Planned housing growth in Adopted Local Plans (less completions to March 2015)





By 2020:

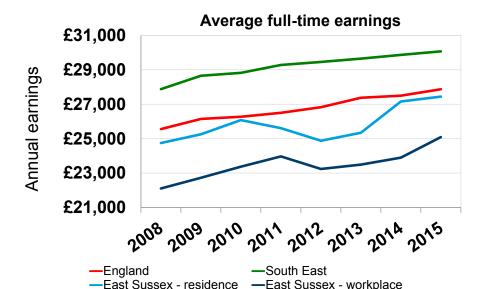
10,500

Unemployed people actively seeking work

(ONS model-based estimate December 2015)

2,500Fewer economically active people aged 16+ in the workforce

(ESCC workforce projections)



Source: Annual Survey of Hours and Earnings (ASHE)

Average (median) earnings, workplace-based									
	2009 2011		2013	2015	% Change 2009/15				
Eastbourne	£25,088	£25,153	£23,991	£27,447	+9.4%				
Hastings	£20,558	£22,585	£22,103	£24,776	+20.5%				
Lewes	£25,167	£25,226	£26,653	£26,101	+3.7%				
Rother	n/a	£21,393	£21,362	£21,978	+2.7%				
Wealden	£22,695	£24,015	£22,825	£24,569	+8.3%				

8,000

More jobs needed

6,100

New jobs expected

(East Sussex Economic Forecasting Model, Cambridge Econometrics, September 2014)

1,900

Jobs shortfall

Employment

- 73.1% of working age population (age 16-64) in employment 2014/15 (down from 74.1% in 2013/14), Great Britain 72.7%, South East 76.3%
- County employment rate remains below pre-recession level of 76.0% in 2007
- Overall claimant rate for JSA or Universal Credit March 2016, 1.4%
- 18–24 year old claimant rate for JSA or Universal Credit March 2016:
 - → 2.7% (1,045 claimants) down from 4.8% (1,855 claimants) March 2014
 - → fell in all districts, the greatest change in Hastings, now 3.9% down from 7.1% March 2014
 - → lowest rate. Wealden 1.4%

Sources: Nomis; Annual Population Survey (APS), Jan-Dec 2015, ONS Claimant Count and Nomis area profile, March 2016

Earnings

Residence-based (those living in East Sussex)

- £27,441 average full-time wage in 2015, 1.5% below the national average and 8.8% below the South East average
- East Sussex average full time wage projected to increase to £28,400 by 2020
- In 2014, 34.9% of work was part time, England 30.4%, South East 31.1%
- Average part time wage £8.59 per hour in 2015, compared to full time wage of £13.25
- Annual earnings for all residents has decreased by 1.4% since 2014, England +1.6%, South East +2.1%

Workplace-based (those working in East Sussex)

- £25,093 average full-time wage in 2015
- 10.0% below the national average and 13.6% below the South East average
- Average part time wage in 2015 was £8.21 per hour; full time £12.12

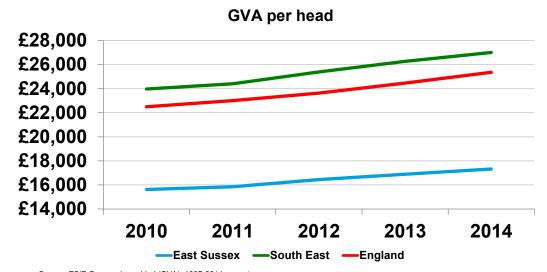
Source: Annual Survey of Hours and Earnings (ASHE) 2015

East Sussex Growth Strategy

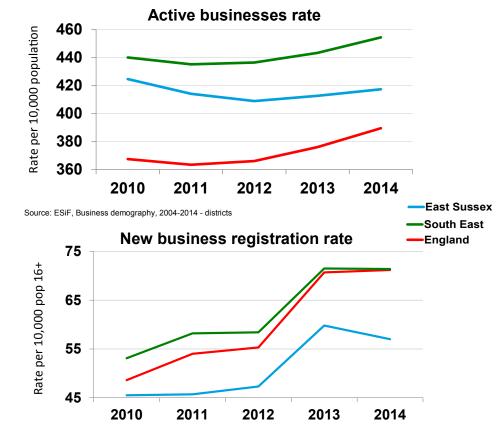
- Published in 2014, The East Sussex Growth Strategy (ESGS) sets out an ambitious vision for the East Sussex economy to 2020
- Goals include:
 - → Increasing Gross Value Added per capita by 20% by 2020
 - → Enhancing digital connectivity (e.g. broadband) and physical connectivity (e.g. roads)
 - → Supporting business start-ups and promoting the county as a business location
 - → Developing skills that match business needs
- ESGS highlights emerging high growth and innovative sub-sectors including: engineering and advanced manufacturing; health and social care; and digital, media and creative

Gross Value Added (GVA)

- GVA per head measures the value of goods or services produced in an area per person living in that area
- GVA per head in East Sussex in 2014 was £17,321; England £25,367, South East £27,012
- The East Sussex rate is an increase of 10.9% (£1,697) since 2010; below the increase in England, 12.7% (£2,866), and the South East, 12.7% (£3,040)



Source: ESIF Gross value added (GVA), 1997-2014 - county Note: income is added to the GVA where people work not where they live



Source: ESIF, New business registration rate, 2004-2014 - districts and Business demography, 2004-2014 - districts

Active businesses and new business registration rates

- · Business formation has been showing signs of recovery across the county
- More active businesses in 2014 (22,520) than in 2013 (22,045)
- More business starts (2,550) than closures (1,965), although there were slightly fewer starts in 2014 than in 2013 (2,645)
- All areas of the county, and nationally, saw a steady decrease in business registration rates between 2008 and 2010
- 2013 saw a 26% increase in registration rates in the county, England 28%, and South Fast 22%
- However while the rate in the South East and nationally has remained steady or even increased slightly in 2014, it has decreased by almost 5% in East Sussex

Transport and complementary infrastructure

- The Bexhill Hastings Link Road (Combe Valley Way) opened December 2015
- Planning permission granted for over 1,000 houses and 7,000sqm of business space on land opened up by the road and the first building on the new Bexhill Enterprise Park, Glovers House, is now fully let
- Havelock Place in Priory Quarter business district was fully completed in 2015 offering 2,250sqm of office space, which can accommodate up to 350 employees
- Terminus Road improvements in Eastbourne to support the refurbishment of the Arndale Centre



Arndale Centre improvements

Planned from 2016

- Newhaven Port Access Road will offer improved access to the port, part of Newhaven rejuvenation
- Queensway Gateway Road
- A27 improvements Eastbourne Lewes
- A22/A27 junction improvements Polegate
- HS1 rail extension to Bexhill-on Sea subject to funding



Digital infrastructure

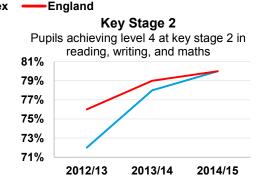
- In 2013, 80.3% of people in East Sussex had used the internet in the last three months, UK 83.3%, South East 86.6%
- Since then, 66,453
 additional premises have access to improved broadband speeds
- 82% of these new connections are able to receive speeds of 24mbps and above
- By 2015 the number of people who had used the internet in the last three months in East Sussex increased to 88.1%, UK 86.2%, South East 89.6%

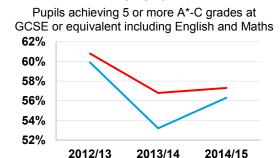
Source: ONS, Internet users 2015

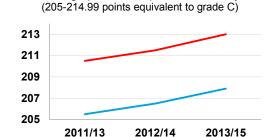
Skills

- Achievement rates have been rising over the last three years for early years and primary school age children
- After a drop in 2013/14, GCSE achievements have improved to 56.3%, closer to the national average, 57.3%
- A level average point scores are still lower than England by 5.1 points

Early Years Percentage of children that achieved a good level of development in all areas of learning 70% 60% 50% 40% GCSEs







A Level

Average point score per A Level entry

Qualifications of working age population 2015

	No qualifications	NVQ Level 1 (GCSE grade D-G, etc.)	NVQ Level 2 (GCSE grade A*-C)	NVQ Level 3 (A Level, etc.)	NVQ Level 4 (Degree, etc.)	Other qualifications
East Sussex	8.8%	84.7%	70.3%	53.7%	31.2%	6.6%
South East	6.3%	88.5%	76.8%	60.5%	39.8%	5.2%
England	8.4%	85.0%	73.4%	57.1%	36.7%	6.6%

Note: Survey data, confidence level +/- 1.6 - 3.2 for East Sussex. Therefore care should be taken when reading these results Respondents qualified to at least the level shown

Source: ESIF: Qualifications of working age population, 2005-2014 - districts

- 6.5% increase in people with a level 4 qualification in East Sussex since 2010
- Eastbourne has the highest proportion of people with a level 4 qualification (38.0%), the lowest is Hastings (24.9%)

Meeting business needs

- Innovative firms employ a higher share of Science, Technology, Engineering and Maths (STEM) graduates
- Nationally in 2015, the STEM graduate employment rate was 88.4%, Law, Economics & Management 88%, and Other Social Sciences, Arts & Humanities 85.6%
- 27.8% of A level entries in the county were for STEM subjects in 2014/15, lower than England (32.5%) and less then the previous year (30.6%)
- University Technical College Harbourside, Newhaven, opened in 2015, offering young people GCSE and A level STEM training in Marine focused subjects
- Work has started on a £14m Advanced Engineering Building at Brighton University, which will work with students and local engineering companies
- The Skills East Sussex engineering task group is delivering a range of STEM focused careers guidance and delivery activities including STEMfest East Sussex events, STEM careers materials, new curriculum planning and course delivery, and employer site visits, in order to stimulate interest in STEM learning and ensure that local provision meets increased demand

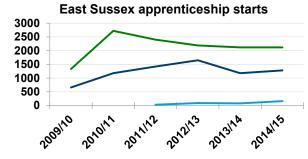
Source: DBIS, Graduate Labour Market Statistics, April 2016

Apprenticeship rates

• 5.1% of the 1,000 East Sussex businesses surveyed in 2014 currently employed government funded apprentices

 1.6% were in the process of hiring apprentices and 15.4% said they would be likely or very likely to do so in the future

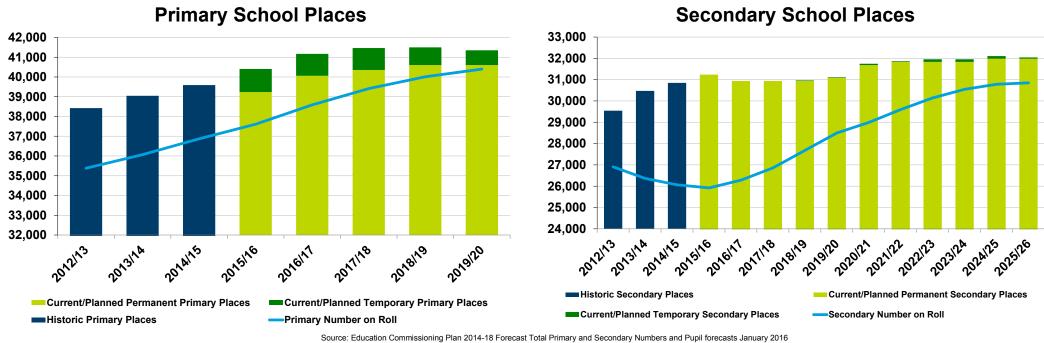
- In 2015/16 the Council took on 57 apprentices and 49 young people participated in our work readiness courses
- In 2016/17, a further 80 will participate in work readiness provision and at least 56 will undertake a Council or school apprenticeship



—Intermediate Apprenticeships—Advanced Apprenticeships—Higher Apprenticeships

Source: ESIF: Apprenticeship starts and achievements, 2005-2015 - districts

- Skills East Sussex has secured funding to deliver apprenticeship awareness sessions in all secondary schools for 450 young people, to offer one-to-one support into an apprenticeship for 240 young people, and to run three sector specific preapprenticeship work readiness programmes in 2016/17 for 60 young people
- In 2017, an apprenticeship levy will be made on any organisation with a payroll bill of £3m or more. It is proposed that public sector organisations will be required to employ 2.84% of their workforce as apprentices



Primary school places

- Additional capacity is planned to meet forecast shortfalls in local areas: 947 extra places by 2019/20 compared to 2015/16
- Includes additional temporary places to meet short-term demand
- Total numbers on roll expected to fall from around 2021/22
- Post 2021/22 increases still likely in some local areas

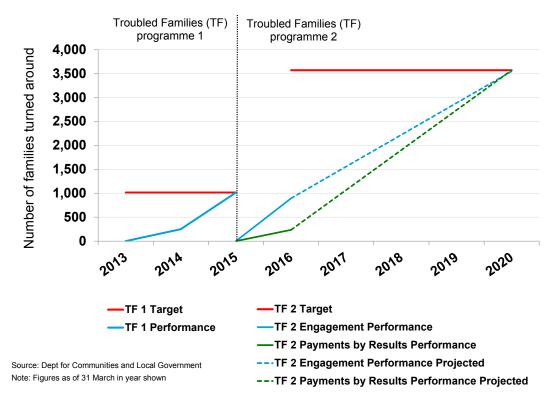
Secondary school places

- Total number of places is fewer than primary as many 16 17 year old students don't attend school sixth forms
- Secondary numbers expected to peak around 2025/26
- Capacity in some local areas forecast to be exceeded before 2020
- Current capital programme ends 2017/18; after this more places will be needed

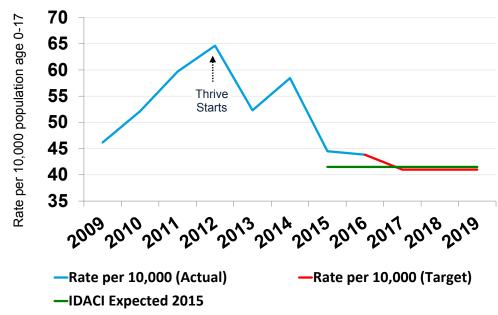
	Projected change in youth population												
	2016	2017	2018	2019	2020	% change 2016-2020	2021	2022	2023	2024	2025	2026	% change 2021-2026
0-3	22,211	22,420	22,755	22,711	22,639	+1.9%	22,533	22,427	22,322	22,208	22,098	21,971	-2.5%
4-10	42,178	42,296	42,237	42,363	42,514	+0.8%	42,496	42,412	42,377	42,501	42,702	42,586	+0.2%
11-15	28,540	28,930	29,619	30,357	30,840	+8.1%	31,475	31,877	32,166	32,108	31,991	32,001	+1.7%
16-17	10,625	10,113	9,929	9,792	10,077	-5.2%	10,235	10,508	10,833	11,031	11,137	11,215	+9.6%

Source: ESCC dwelling-led population projections, January 2016

Troubled Families



Number of children with a Child Protection Plan



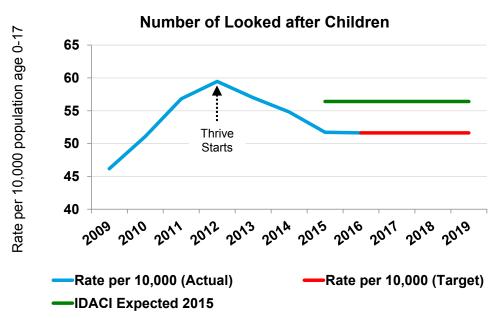
Source: CLA Return (903)/ SE Sector Led Improvement Social Care Benchmarking Note: Figures as of 31 March in year shown

Troubled Families results

- The national Troubled Families programme (TF2) runs from 2015-2020
- Troubled Families work is a core element of Children's Services delivery
- Payment by Results outcomes are achieved when families reach and sustain progress thresholds in six key areas
- Successful family outcomes impact positively on all priority outcomes and reduce demand for other services
- In 2015/16, 895 families where engaged and 236 reached payment by results outcomes for which claims were made

Child Protection (CP) Plans

- Before Thrive the number and rate of CP Plans were rising each year
- Projected rate was unsustainable
- The number of CP Plans for 2016 was 462, a rate of 43.8 per 10,000 children
- This is still above the expected rate benchmarked for child deprivation; the Income Deprivation Affecting Children Index (IDACI)
- Target is to reach and maintain IDACI expected rate of 41 per 10,000 children from 2017



Source: CIN Census/ SE Sector Led Improvement Social Care Benchmarking Note: Figures as of 31 March in year shown

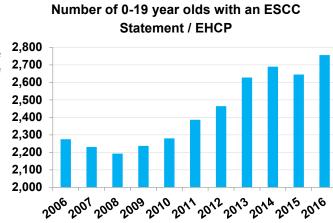
Percentage of 0-19 year olds with an ESCC Statement / EHC Plan 2.5% 2.3% -East Sussex —England 1.9% 1.7% 1.5% 2.0

Looked After Children (LAC)

- Before Thrive, LAC numbers were rising year on year and the budget was unsustainable
- By 31 March 2016 LAC numbers had been reduced to 544 (51.6 per 10,000 children), from 620 in 2012 (59 per 10,000 children)
- The average cost per LAC per week in East Sussex is £708, compared to the national average of £919 and a comparison group of 11 LA's average of £963
- Target for 2016/17 is to maintain the rate of 51.6 per 10,000

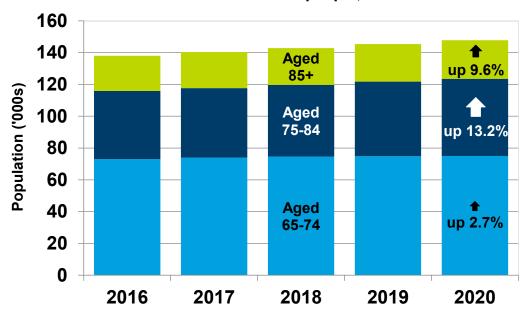
Special Educational Need (SEN) and Disability

- Since September 2014 Education, Health & Care Plans (EHCP) replace a statement of SEN for new assessments. EHCP can remain in place for young people up to the age of 25
- Council funded high cost placements at Independent and Non-Maintained Special Schools (INMSS) have increased since 2015 but remain between 7% and 8% of the total number of Statements/EHCP
- All statements of SEN/EHCP maintained by the Council increased by 26% from 2008 (2,193) to 2016 (2,756)
- Numbers are forecast to rise to 3,200 by 2020
- The majority of provision is funded by a local authority (primarily ESCC) or from within a schools own delegated budget
- ESCC Statement of SEN/EHCP as a percentage of population aged 0-19 (2.35% in 2016) continues to be above that for England (1.86% in 2015)
 Number of 0-19 year olds with an ESCC
- Due to increased demand, there has been an increase in the number of alternative provision placements for primary age children; an application for a special free school has also been submitted
- Evaluation of parental satisfaction locally is positive for new EHCP



Source: CN Census/ SE Sector Led Improvement Social Care Benchmarking Note: Figures as of January in year shown

Increase in older people, 2016-2020

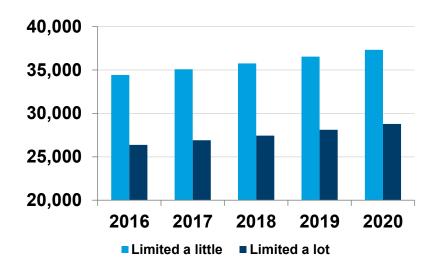


Source: ESCC dwelling-led population projections, January 2016

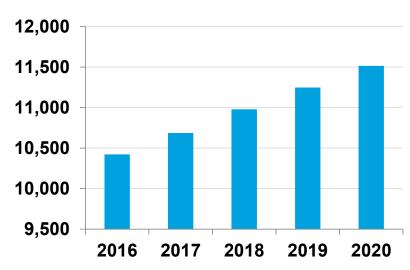
Compared to 2016, by 2020 there will be:

- A fall in the population of working age people (age 18-64) of 0.9%
- A countywide increase in older people (age 65+) of 9,767 (7.1%), from 138,063 to 147,830
 - → Eastbourne: 1,305 more (up 5.2%), biggest increase in age 75-84 (9.1%)
 - → Hastings: 1,345 more (up 7.6%), little rise in 65-74 (3.8%) and 85+ (3.6%), but 16.9% increase in 75–84
 - \rightarrow Lewes: 1,867 more (up 7.3%), biggest increase in age 85+ (13.7%)
 - → Rother: 1,830 more (up 6.2%), little rise in 65-74 (2.2%), 12.8% rise in 75-84
 - \rightarrow Wealden: 3,419 more (up 8.5%), 16.2% rise in 75-84 and 15.9% rise in 85+
- 11,515 older people (age 65+) projected to have dementia (up 10.5%)
- 37,320 older people (age 65+) projected to have a limiting long term illness whose day to day activities are limited a little (up 8.4%), 28,785 limited a lot (up 9.1%)

Older people (age 65+) with a limiting long term illness projections

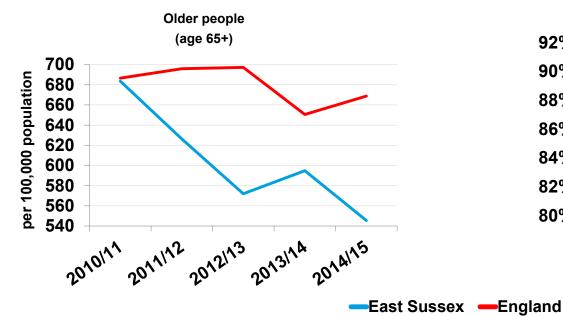


Older people (age 65+) with dementia projections

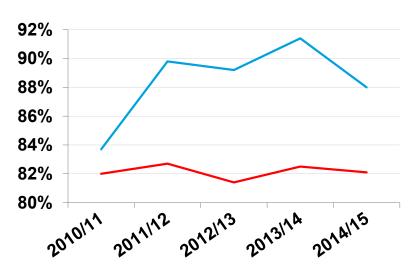


Source: POPPI: www.poppi.org.uk Note: 2019 figures estimated

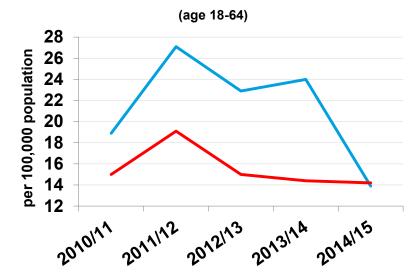
Permanent admissions to residential and nursing care homes



Older people (age 65+) still at home 91 days after discharge from hospital



Working age people



Community care and promoting independence

- Work to reduce dependency on long term residential care has seen permanent admissions of working age people (age 18-64) to residential and nursing care homes reduce to levels in line with the national rate
- Permanent admissions of older people (age 65+) have also reduced in 2014/15 to significantly below the rate for England
- The proportion of older people (age 65+) still at home 91 days after discharge from hospital into reablement/rehabilitation services dropped slightly in 2014/15 to 88%, but is still above national figure 82%
- The number of older people (age 65+) admitted to hospital due to falls has decreased in 2014/15 to 2,108 per 100,000 (England 2,125)

2014/15 2015/16

East Sussex Better Together (ESBT)

- East Sussex is covered by three Clinical Commissioning Groups (CCGs): High Weald, Lewes and Havens (HWLH); Hastings and Rother (H&R) and Eastbourne, Hailsham and Seaford (EHS)
- ESBT is a collaboration between the Council, EHS and H&R CCGs to develop a fully integrated health and social care system

Support services

- The total number of clients receiving Long Term support, including out of county clients, has increased by 2.4% in 2015/16, to 9,857
- The total number of requests for support, including out of county requests, in 2015/16 was 12,912, up 8.4%
- The number of Carers, including out of county Carers, receiving support also increased, up 13.5% from 2014/15

2,750

2.500

2,250

2.000

1,750

1,500

1,250

1.000

750

500

250

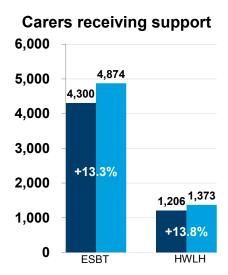
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2.539

2,088

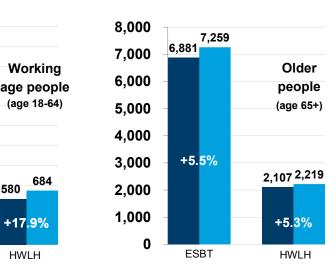
+21.6%

ESBT

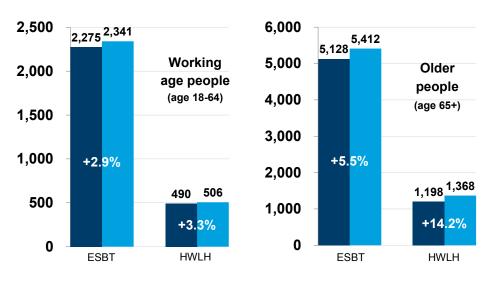


Carers receiving support including Information, Advice and Other Universal Services / Signposting

Requests for support



Clients receiving Long Term support



Requests for Support are contacts from new clients or their representative, or someone acting on their behalf being made in relation to the provision of Adult Social Care services, excluding 'casual contacts' (A contact where personal details were not taken) and matters relating to adult safeguarding procedures

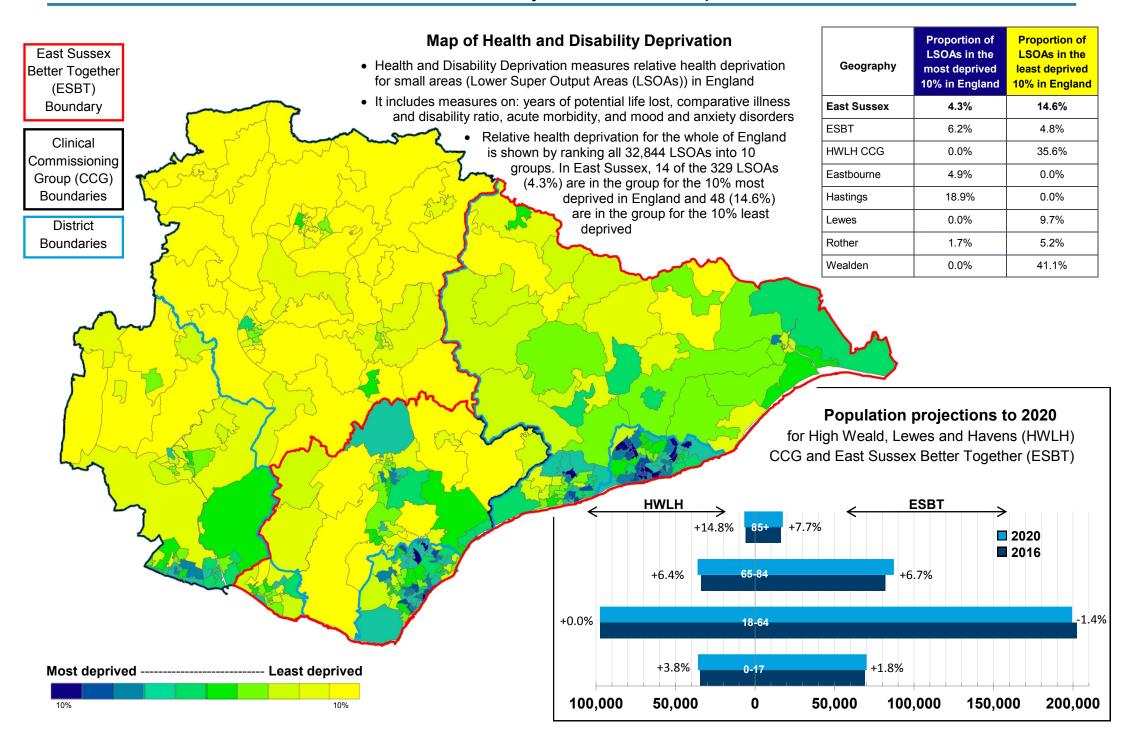
684

580

+17.9%

HWI H

Long Term support encompasses any service or support which is provided with the intention of maintaining quality of life for an individual on an ongoing basis, and which has been allocated on the basis of eligibility criteria/policies (i.e. an assessment of need has taken place) and is subject to regular review



State of the County Data

We use a wide range of data to help us understand the context for our plans and the impact we are having through our work and in partnership. A selection of this data is listed below. Years are financial (April-March) or academic (September-August) unless otherwise stated.

Measure	13/14	14/15	14/15 Eng	15/16
Percentage of working age residents (16-64 year olds) with a level 4 (degree) qualification		CY 14 36.7%	CY 15 (36.7%)	CY 15 31.2%
Percentage of working age residents (16-64 year olds) with no qualifications or qualified only to NVQ1	CY 13 23.5%	CY 14 19.4%	CY 14 (20.6%)	CY 15 23.2%
Gross Value Added (GVA) per head GVA is a measure of economic productivity	£16,886	£17,321	(£25,367)	NA
Percentage of working age population (16-64 year olds) in employment	74.1%	73.1%	(72.7%)	CY 15 73.2%
Claimant rate including Job Seeker's Allowance (JSA) and Universal Credit: claimants as a percentage of working age	2.3%	1.6%	(2.0%)	1.4%
New business registration rate per 10,000 people over 16	59.8	57.0	(71.2)	NA
New houses built, total completed / total affordable	1,208 / 241	1,277 / 364	NC	NA
Percentage of children achieving a good level of development in all areas of learning in the Early Years Foundation Stage (EYFSP)	65.6%	74.3%	(66.3%)	NA
Percentage of pupils achieving level 4 at key stage 2 in reading test, writing TA (Teacher Assessment) and mathematics	78%	80%	(80%)	NA
Proportion of pupils in all maintained schools who achieve five or more A*-C grades at GCSE or equivalent including English and	53.2%	56.3%	(57.3%)	NA
Average point score per entry for A levels and other level 3 exams	206.5	207.9	(213.0)	NA
Percentage of A level entries that were for STEM (Science, Technology, Engineering and Mathematics) subjects	30.6%	27.8%	(32.5%)	NA
Percentage of exams awarded A/A* grades for A level STEM (Science, Technology, Engineering and Mathematics) subjects	24.4%	20.3%	(30.2%)	NA
Rate per 10,000 (aged 0-17 population) of Looked After Children	54.5	52	(60)	51.6
Rate per 10,000 (aged 0-17 population) of children with a Child Protection Plan	58.5	44.5	(42.9)	43.8

Measure	13/14	14/15	14/15 Eng	15/16
Children who ceased to be looked after percentage adopted during the year ending 31 March	27%	23%	(17%)	NA
Rate of hospital emergency admissions caused by unintentional and deliberate injuries in children and young people aged 0-14 years per 10,000 population	125.2	121.6	109.6	NA
Proportion of LAC who achieve five or more A*- C GCSEs including English and Maths	21.2%	12.5%	(12%)	NA
The proportion of people who use Adult Social Care services who feel safe	63%	72.2%	(68.5%)	70.0% (provisional)
Suicide rate per 100,000 of population	11.0	10.7	(8.9)	NA
The proportion of people who use Adult Social Care services who find it easy to find information about services	81.2%	73.2%	(74.5%)	76.2% (provisional)
Proportion of people who received short-term services during the year, where no further request was made for ongoing support or support of a lower level	NM	88.8%	(74.6%)	NA
Proportion of older people aged 65 and over offered reablement services following discharge from hospital	3.7%	1.5%	(3.1%)	NA
Percentage of children 4 - 5 years old with excess weight (overweight or obese)	21.8%	20.0%	(21.9%)	NA
Percentage of children 10-11 years old with excess weight (overweight or obese)	30.7%	29.6%	(33.2%)	NA
Long-term support needs of younger adults (aged 18-64) met by admission to residential and nursing care homes, per 100,000 population	NM	13.9	(14.2)	NA
Long-term support needs of older adults (aged 65 and over) met by admission to residential and nursing care homes, per 100,000 population	NM	545.5	(668.8)	NA
The proportion of people who use services who reported they had as much social contact as they would like	45.3%	47.8%	(44.8%)	42.6% (provisional)
Proportion of older people aged 65 and over who were still at home 91 days after discharge from hospital	91.4%	88.8%	(82.1%)	NA
Number of people Killed or Seriously Injured on the road	339	390	NC	CY 15 348