



SOUTH EAST
LOCAL ENTERPRISE
PARTNERSHIP

Key Indicators Report

Communities for the Future

June 2022



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Headline Summary

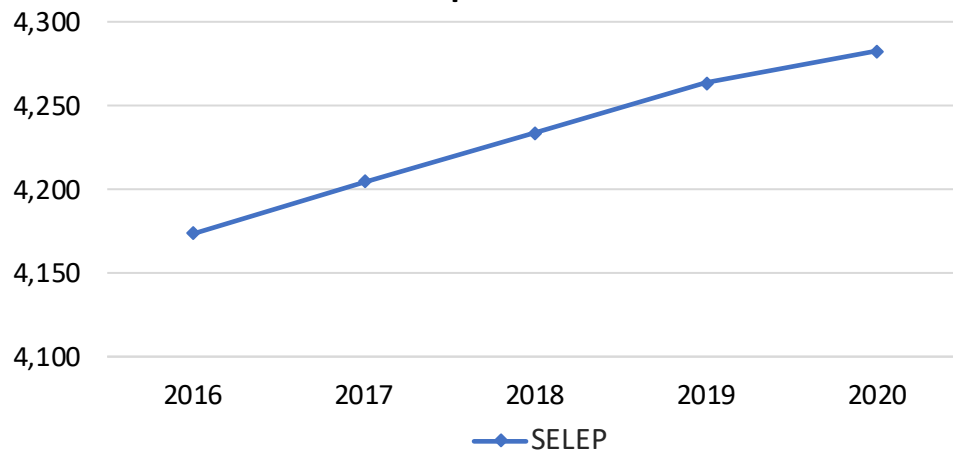
- SELEP experiences higher population growth than the national average, although growth has slowed in the last few years with 2019 to 2020 seeing very low growth
- Completion of new dwellings dropped significantly during the first lockdown but recovered well after this, with strong delivery in quarter 1 of 2022
- Over 80% of new dwellings achieve an energy performance rating of A or B
- SELEP has exceeded the national average in recent years for growth of industrial employment space, and in line with national trends continues to see losses of office space year on year
- Roll-out of Gigabit broadband is proceeding at pace up with 54.8% availability to premises in January 2022
- Per capita carbon emissions have been reducing year on year but remain high for transport and domestic properties
- Workplace footfall remains at 20-26% below pre-pandemic levels across upper tier local authorities



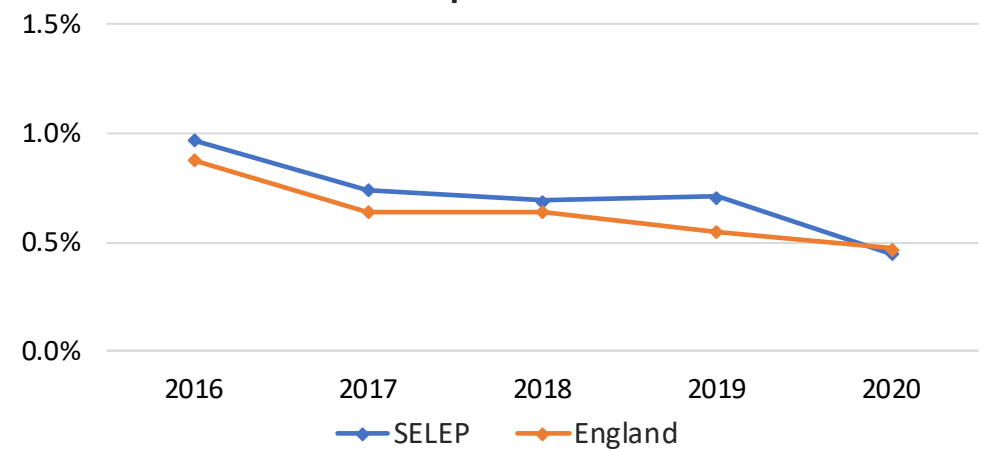
Population

- The usual resident population in the SELEP area has in recent years been growing faster than the national average
- Annual population growth has slowed since 2016 primarily due to a lower rate of natural increase (births less deaths) following a baby boom period in prior years
- Inward international migration has been the main driver for population growth since 2014
- The year to June 2020 saw the lowest natural population increase for many years

Usual Resident Population - in thousands



Annual Population Growth



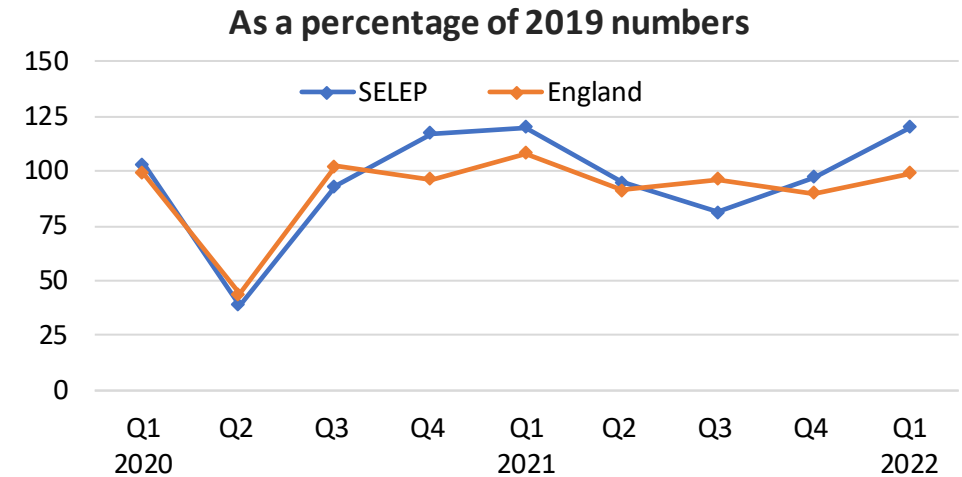
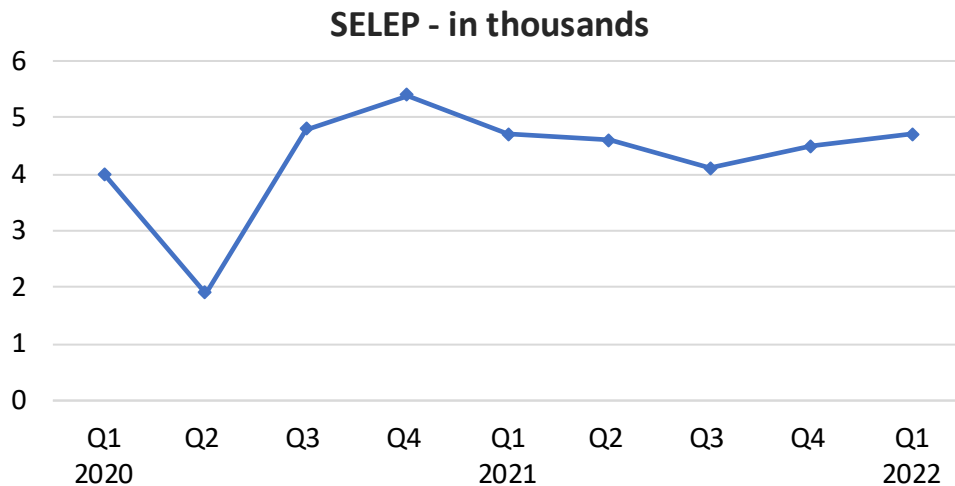
	2016	2017	2018	2019	2020
SELEP	4,174	4,205	4,234	4,264	4,283
England	55,268	55,619	55,977	56,286	56,550

	2016	2017	2018	2019	2020
SELEP	0.97%	0.74%	0.69%	0.71%	0.45%
England	0.88%	0.64%	0.64%	0.55%	0.47%

Source: ONS, Mid-year population estimates

New Dwellings

- Completion of new build dwellings (based on energy performance certificates) reduced significantly in quarter 2 of 2020, in line with legal restrictions relating to COVID
- The remainder of 2020 saw a strong recovery in completions, to a level above that seen in 2019
- Delivery in 2021 from quarter 2 onwards was below the 2019 level but with strong output in quarter 1 of 2022
- Since late 2020 SELEP delivery compared to 2019 has been better than national with only quarter 3, 2021 being an exception



	2020				2021				2022
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
SELEP	4.0	1.9	4.8	5.4	4.7	4.6	4.1	4.5	4.7
England	57.6	29.2	63.3	65.3	63.0	60.6	59.1	61.1	57.6

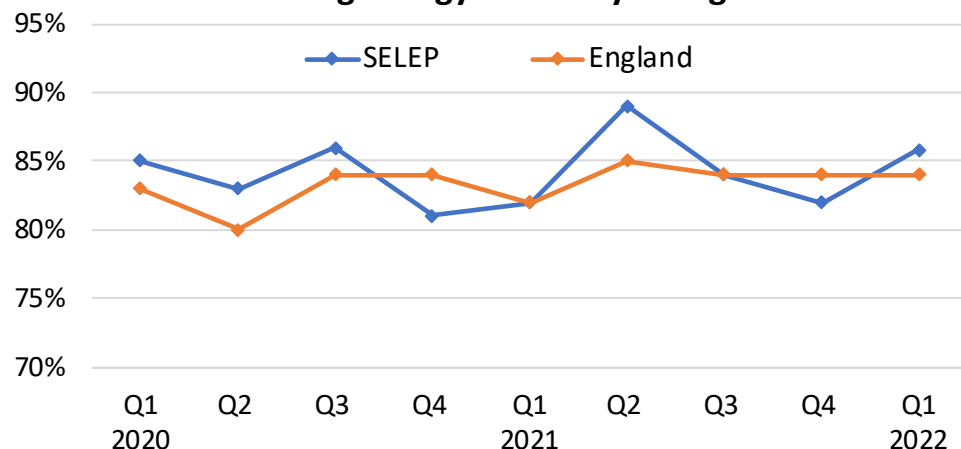
	2020				2021				2022
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
SELEP	103	39	93	117	120	95	81	97	120
England	99	44	102	96	108	91	96	90	99

Source: DLUHC, Live Tables NB4

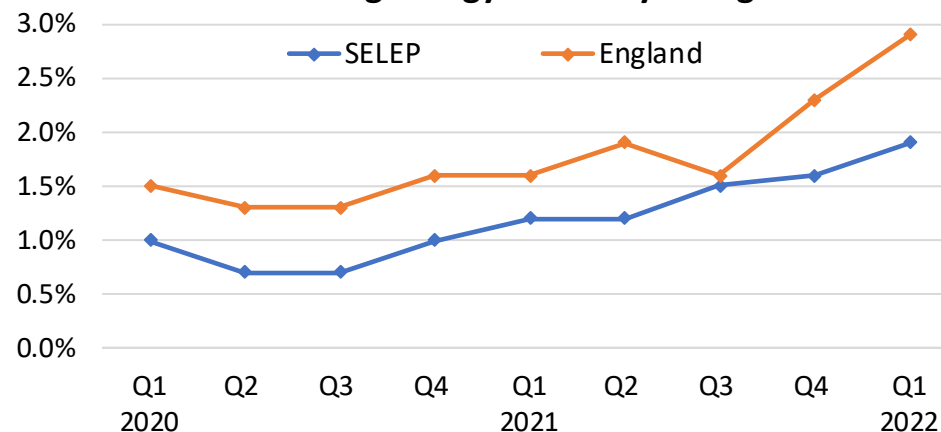
New Dwelling Energy Efficiency

- More than 80% of new build dwellings achieve an energy performance certificate rating of A or B
- However, only a small percentage achieve the top rating of A, although this proportion has been increasing over time
- The remainder of new build dwellings mostly achieve a rating of C (just over 11%)
- A small proportion of new build dwellings (5.8%) do not achieve a rating of at least C, with about 0.2% failing to achieve a minimum standard of at least E

New dwelling energy efficiency rating - A & B



New dwelling energy efficiency rating - A



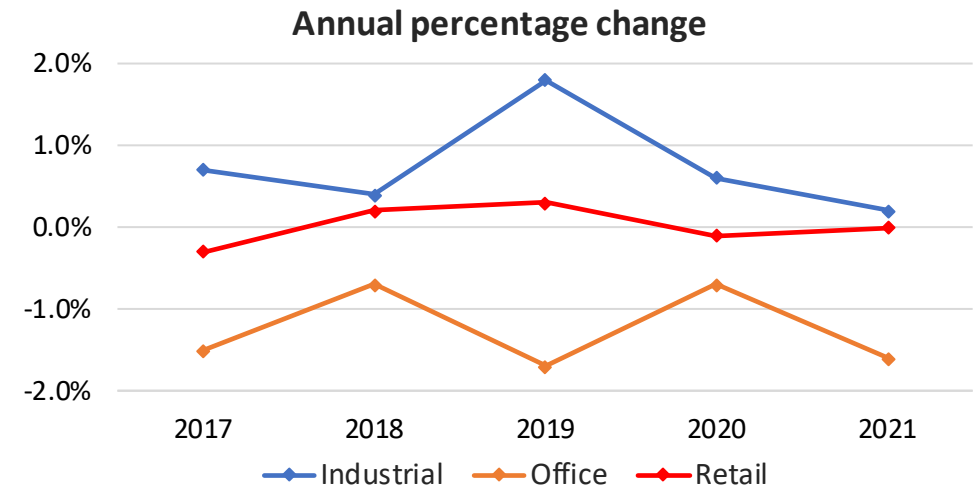
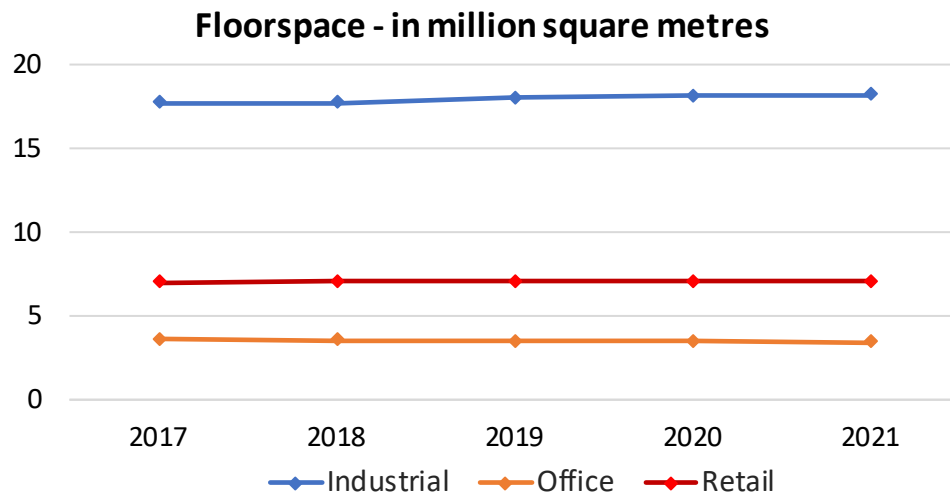
	2020				2021				2022
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
SELEP	85%	83%	86%	81%	82%	89%	84%	82%	86%
England	83%	80%	84%	84%	82%	85%	84%	84%	84%

	2020				2021				2022
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
SELEP	1.0%	0.7%	0.7%	1.0%	1.2%	1.2%	1.5%	1.6%	1.9%
England	1.5%	1.3%	1.3%	1.6%	1.6%	1.9%	1.6%	2.3%	2.9%

Source: DLUHC, Live Tables NB4

Non-domestic properties

- Of the three main categories of non-domestic properties, industrial buildings have shown the most percentage increase in square metres in recent years
- With particularly strong growth in industrial property square meterage in 2019, SELEP has out-performed the England average for growth in this sector
- Availability and usage of office space has been in decline nationally and locally for some years, with SELEP experiencing a higher decline than the England average



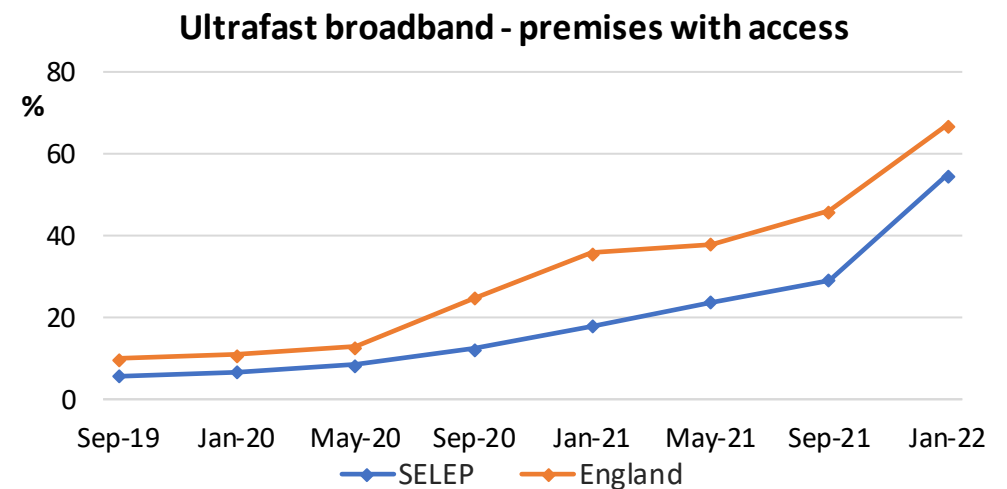
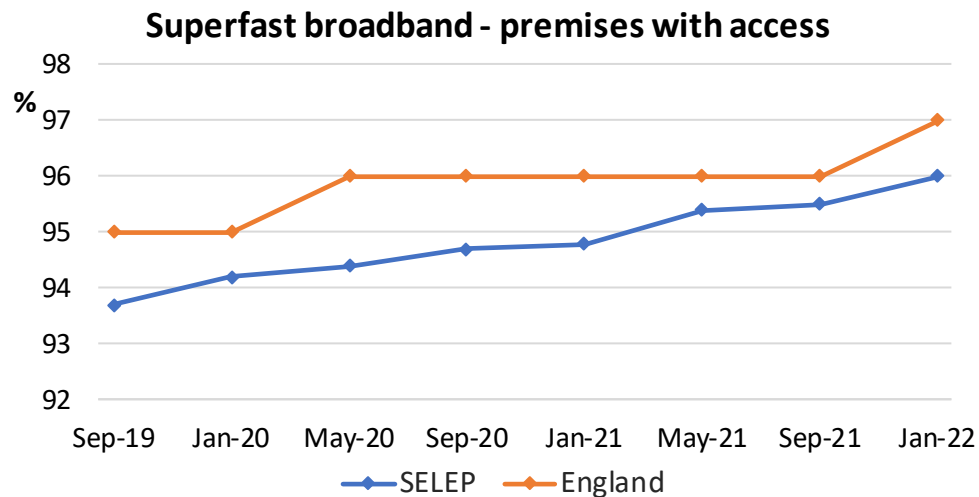
	2017	2018	2019	2020	2021
Industrial	17.7	17.7	18.0	18.1	18.2
Office	3.6	3.6	3.5	3.5	3.4
Retail	7.0	7.1	7.1	7.1	7.1

	2017	2018	2019	2020	2021
Industrial	0.7%	0.4%	1.8%	0.6%	0.2%
Office	-1.5%	-0.7%	-1.7%	-0.7%	-1.6%
Retail	-0.3%	0.2%	0.3%	-0.1%	0.0%

Source: VOA, Non-domestic stock of properties

Broadband availability

- 96% of all premises (domestic and non-domestic) have access to superfast broadband (30Mbit/s or better)
- The focus of government is now on roll-out of gigabit broadband
- The roll-out of gigabit broadband is proceeding at pace, although the SELEP area lags behind the England average
- Access to, or availability of the service may not result in take-up, with skills and income being potential obstacles to take-up for some households, however government targets and available data relate to availability rather than take-up



	Sep-19	Jan-20	May-20	Sep-20	Jan-21	May-21	Sep-21	Jan-22
SELEP	93.7	94.2	94.4	94.7	94.8	95.4	95.5	96.0
England	95	95	96	96	96	96	96	97

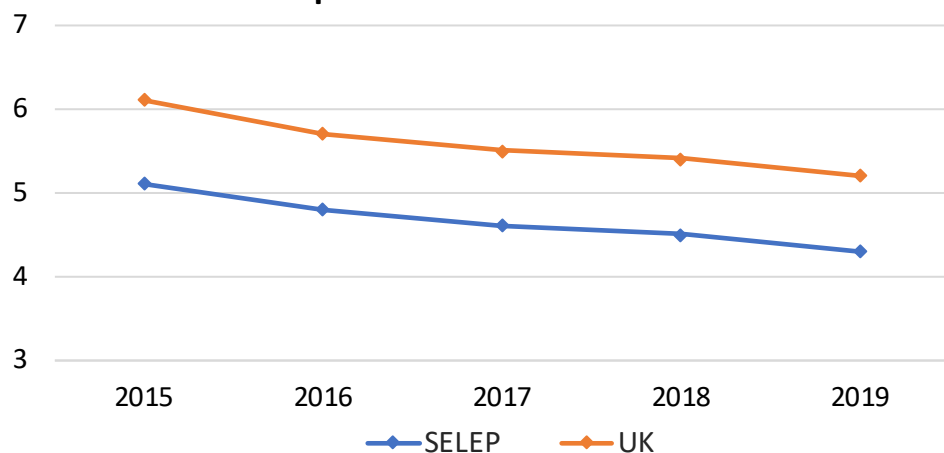
	Sep-19	Jan-20	May-20	Sep-20	Jan-21	May-21	Sep-21	Jan-22
SELEP	6.0	7.0	8.6	12.4	18.0	24.0	29.2	54.8
England	10	11	13	25	36	38	46	67

Source: OFCOM, Connected Nations

Carbon Emissions

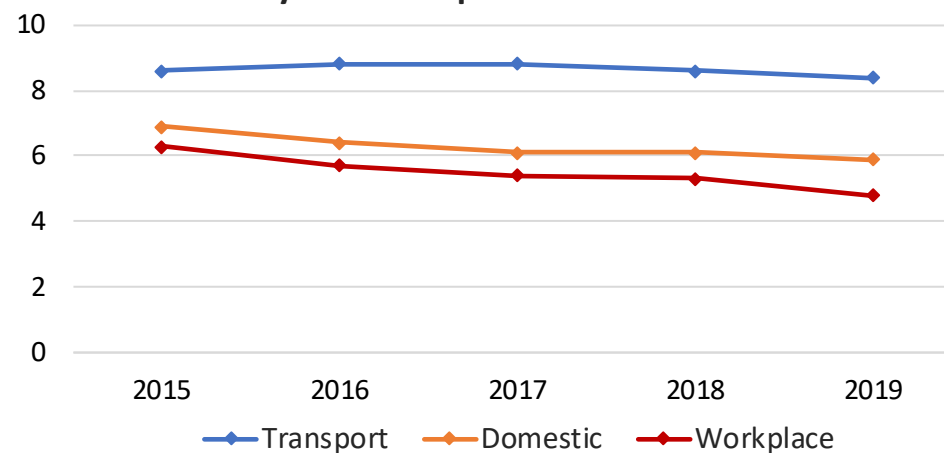
- Per capita carbon emissions have been reducing at a steady rate in recent years
- Much of the reduction has been delivered through a switch to renewable electricity generation, with SELEP as an area having led the way nationally with electricity generation from wind farms and solar installations
- The challenges for the future are mainly around transport and domestic emissions
- The switch to electric vehicles and the need for retrofit of existing dwelling stock are essential to deliver further reductions in emissions

Per capita tonnes CO2 emissions



	2015	2016	2017	2018	2019
SELEP	5.1	4.8	4.6	4.5	4.3
UK	6.1	5.7	5.5	5.4	5.2

SELEP by sector - equivalent million tonnes



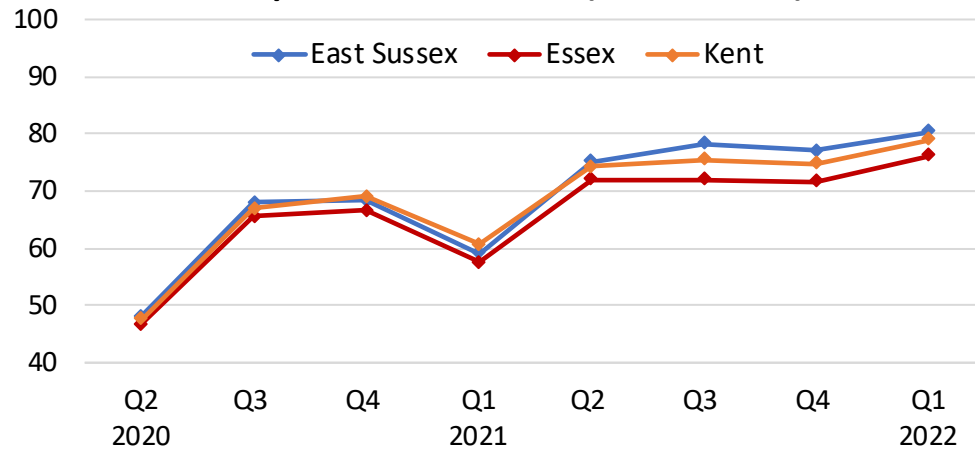
	2015	2016	2017	2018	2019
Transport	8.6	8.8	8.8	8.6	8.4
Domestic	6.9	6.4	6.1	6.1	5.9
Workplace	6.3	5.7	5.4	5.3	4.8

Source: BEIS, local authority carbon emission estimates

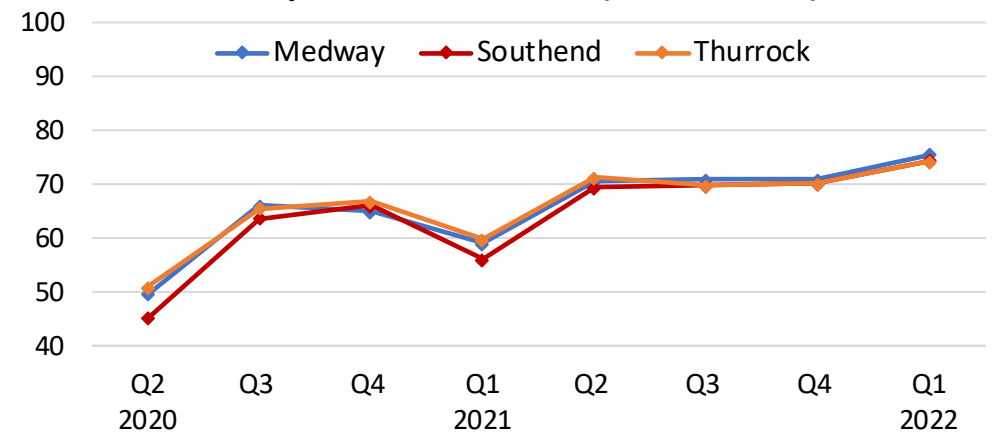
Workplace Footfall

- During the pandemic Google began to make available reports created with from Google Maps using aggregated, anonymized sets of data from users who have turned on the Location History setting, which is off by default
- The resulting datasets provide some insight into movements over time, by place and location type
- The Workplace Index showed a significant drop in footfall during lockdown periods
- At quarter 1, 2022 with hybrid working arrangements becoming common, workplace footfall remains between 20% to 26% down compared to pre-pandemic levels across upper tier local authorities

Workplace Footfall Index (Feb-20 = 100)



Workplace Footfall Index (Feb-20 = 100)




	2020			2021				2022
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
East Sussex	48	68	68	59	75	78	77	80
Essex	47	66	67	57	72	72	72	76
Kent	48	67	69	61	74	75	75	79


	2020			2021				2022
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Medway	50	66	65	59	70	71	71	76
Southend	45	64	66	56	69	70	70	74
Thurrock	51	66	67	60	71	70	70	74


Source: Google Community Mobility Reports



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