



SOUTH EAST  
LOCAL ENTERPRISE  
PARTNERSHIP

## Key Indicators Report

# Coastal Catalyst

September 2022



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# Headline Summary

- In 2020/21 for the first time in recent years, coastal communities in SELEP saw a higher enterprise growth than non-coastal communities, although enterprise stock remains significantly lower in coastal areas
- Job density is correspondingly lower in coastal communities and with a higher proportion of jobs being part time
- With lower availability of local jobs, the claimant rate is higher in coastal communities, and rose more during the pandemic than in non-coastal communities, but the gap has reduced in more recent quarters
- The percentage of jobs in coastal communities which are in knowledge intensive sectors is slightly lower than for non-coastal communities, but with a much higher reliance on the public sector for such jobs
- Coastal communities have a significantly higher proportion of jobs in low pay sectors, with a higher proportion of these jobs in the social care sector
- Gigabit broadband roll out is lagging behind for coastal areas, but with availability increasing rapidly nevertheless

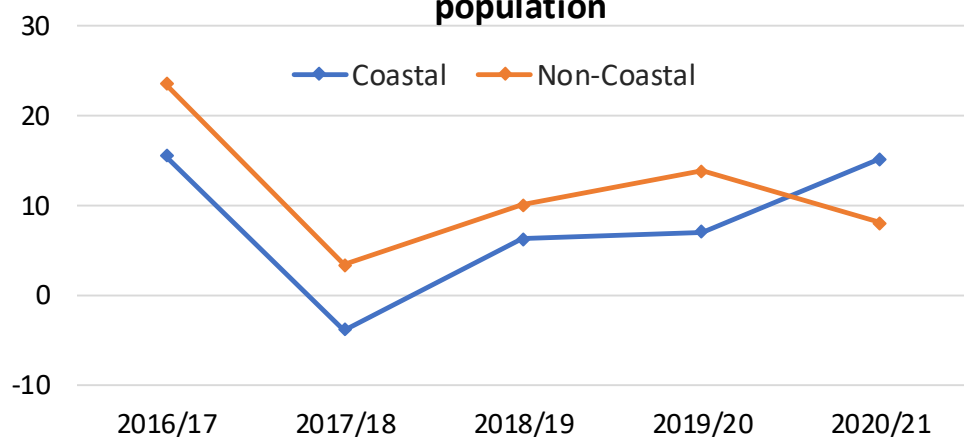
*(Note: coastal communities are defined in accordance with SELEP Coastal Community Health Report, September 2021)*



# Enterprise Growth

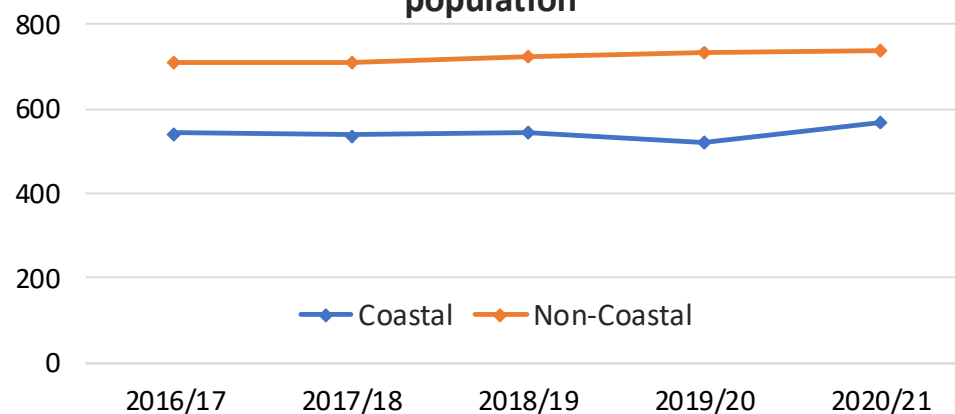
- Coastal communities have for many years seen lower enterprise growth than non-coastal communities
- The first year of the pandemic saw a reversal of this situation with coastal communities seeing a larger enterprise growth rate, with staycations having been a contributing factor
- However the stock of enterprises in coastal communities remains far below the levels in non-coastal communities
- Coastal towns with the lowest enterprise stock are Dover, Harwich, Ramsgate, Sheerness and Peacehaven

**Net enterprise growth - per 10,000 working age population**



	2016/17	2017/18	2018/19	2019/20	2020/21
Coastal	15.5	-3.9	6.2	7.0	15.1
Non-Coastal	23.5	3.3	10.0	13.8	8.0

**Stock of enterprises per 10,000 working age population**

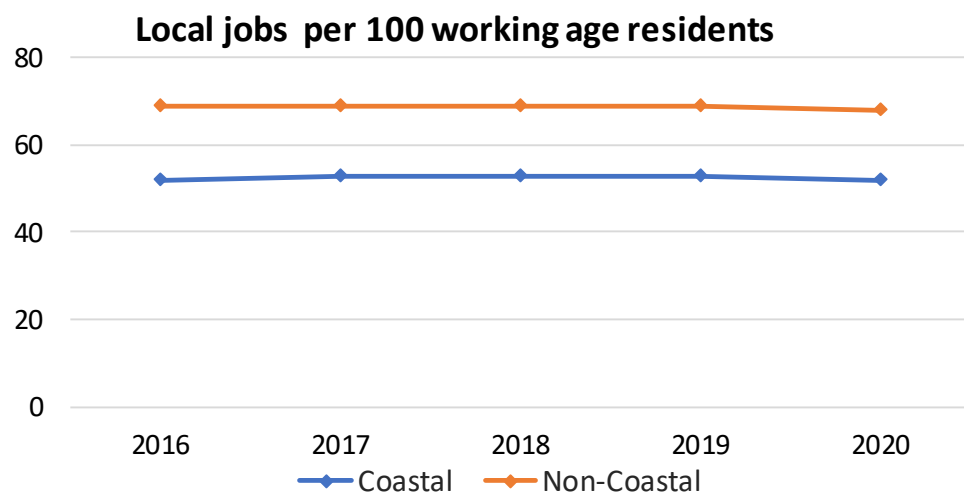


	2016/17	2017/18	2018/19	2019/20	2020/21
Coastal	543.4	538.3	544.9	522.4	568.6
Non-Coastal	710.0	709.9	723.2	733.4	738.2

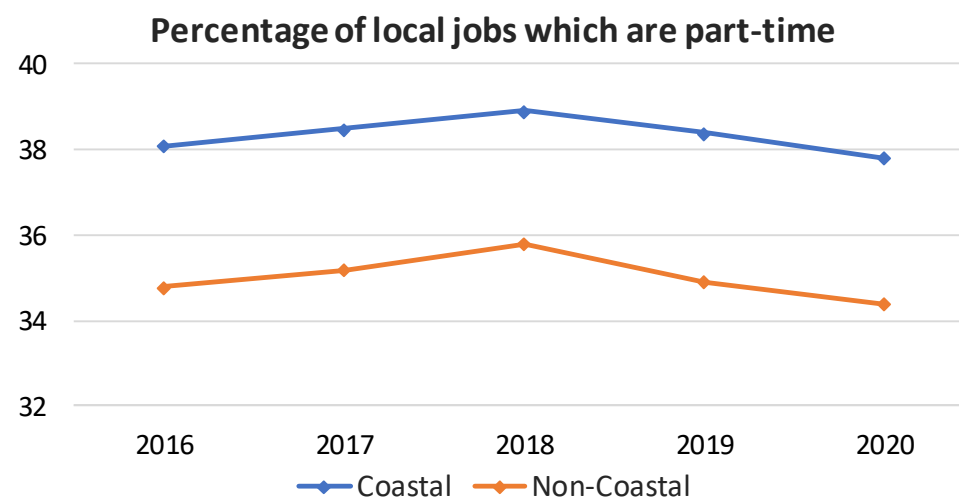
Source: ONS, UK Business Counts

# Job Density

- Across SELEP, Job Density levels are significantly lower in coastal communities compared to non-coastal communities
- The gap in job density levels has remained almost constant for many years
- As well as less jobs being available locally for coastal community residents, a higher proportion of jobs are part time
- The Essex communities of Clacton and Walton-on-the-Naze have the highest proportion of jobs which are part time



	2016	2017	2018	2019	2020
Coastal	52	53	53	53	52
Non-Coastal	69	69	69	69	68

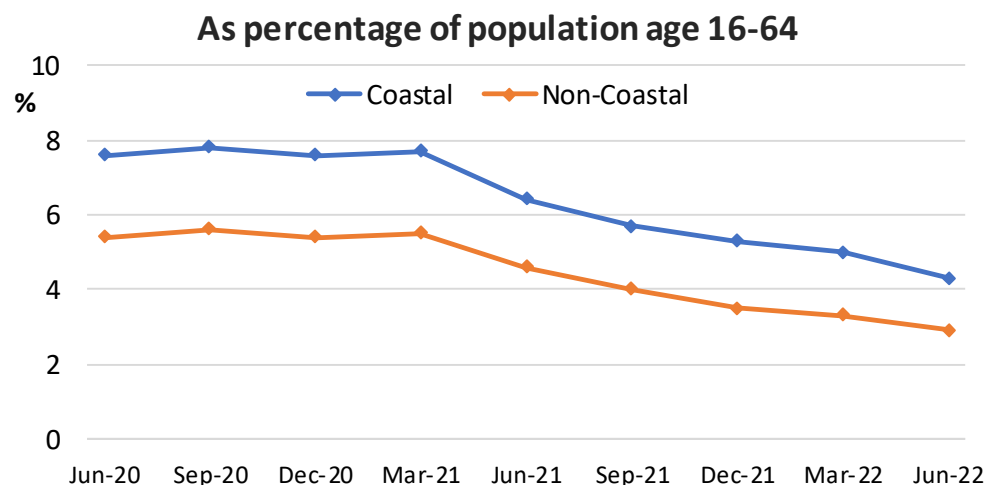


	2016	2017	2018	2019	2020
Coastal	38.1	38.5	38.9	38.4	37.8
Non-Coastal	34.8	35.2	35.8	34.9	34.4

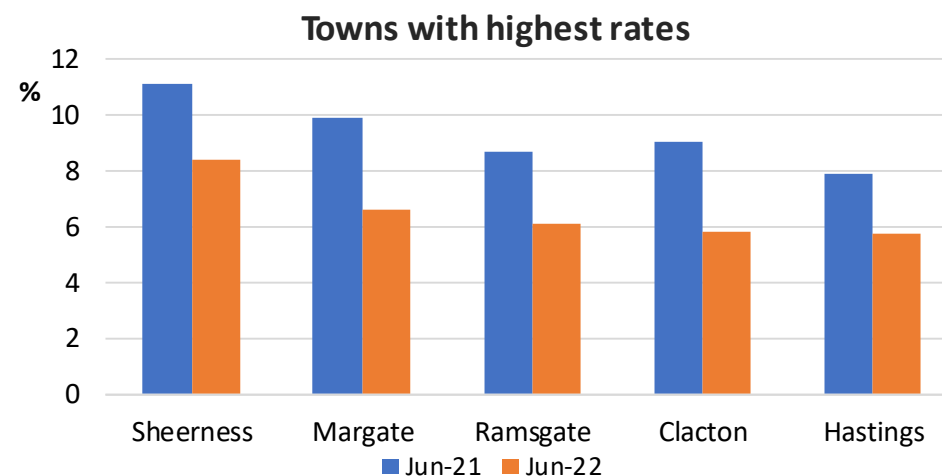
Source: ONS, BRES

# Claimant Rate

- The claimant rate is higher across coastal communities than for non-coastal communities
- During the pandemic the claimant rate increased significantly and more so for coastal communities
- The claimant rate has been reducing since March 2021 and while still above pre-pandemic levels, the gap between coastal and non-coastal communities has now reduced to 1.4%
- Not all coastal communities have high claimant rates, but some have very high rates, with Sheerness, Margate, Ramsgate, Clacton and Hastings having the highest rates



	Jun-20	Sep-20	Dec-20	Mar-21	Jun-21	Sep-21	Dec-21	Mar-22	Jun-22
Coastal	7.6	7.8	7.6	7.7	6.4	5.7	5.3	5.0	4.3
Non-Coastal	5.4	5.6	5.4	5.5	4.6	4.0	3.5	3.3	2.9



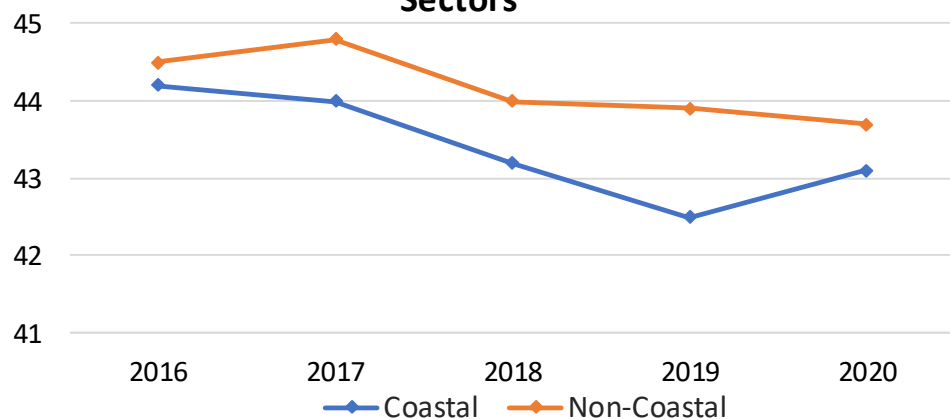
	Sheerness	Margate	Ramsgate	Clacton	Hastings
Jun-21	11.1	9.9	8.7	9.0	7.9
Jun-22	8.4	6.6	6.1	5.8	5.7

Source: ONS, Claimant Count

# Knowledge Intensive Jobs

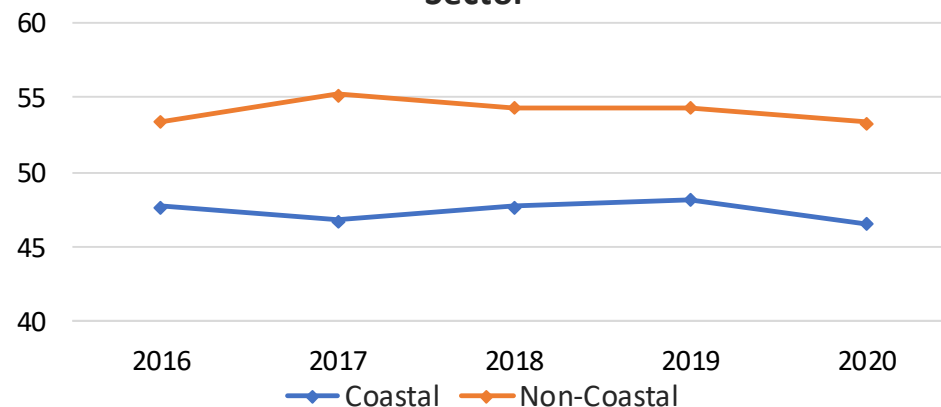
- Knowledge Intensive sectors are those which have a higher proportion of employees with a level 4 or above qualification than the all-sector national average
- There is a lower proportion of jobs in knowledge intensive sectors in coastal communities, although the difference is not large
- However, a much smaller proportion of knowledge intensive jobs in coastal communities are within the private sector, with coastal communities having a higher reliance on public sector jobs

Percentage of Jobs in Knowledge Intensive Sectors



	2016	2017	2018	2019	2020
Coastal	44.2	44.0	43.2	42.5	43.1
Non-Coastal	44.5	44.8	44.0	43.9	43.7

Knowledge Intensive Jobs which are Private Sector

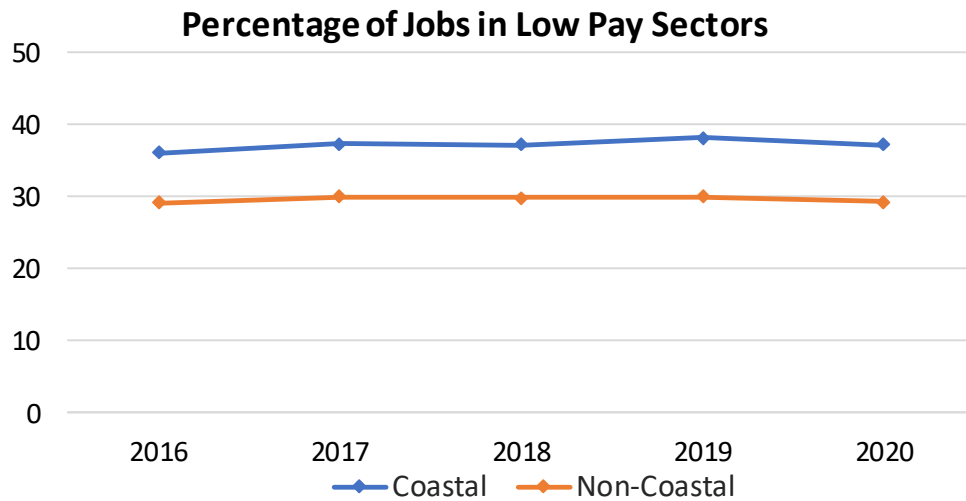


	2016	2017	2018	2019	2020
Coastal	47.7	46.8	47.7	48.2	46.6
Non-Coastal	53.4	55.2	54.3	54.3	53.3

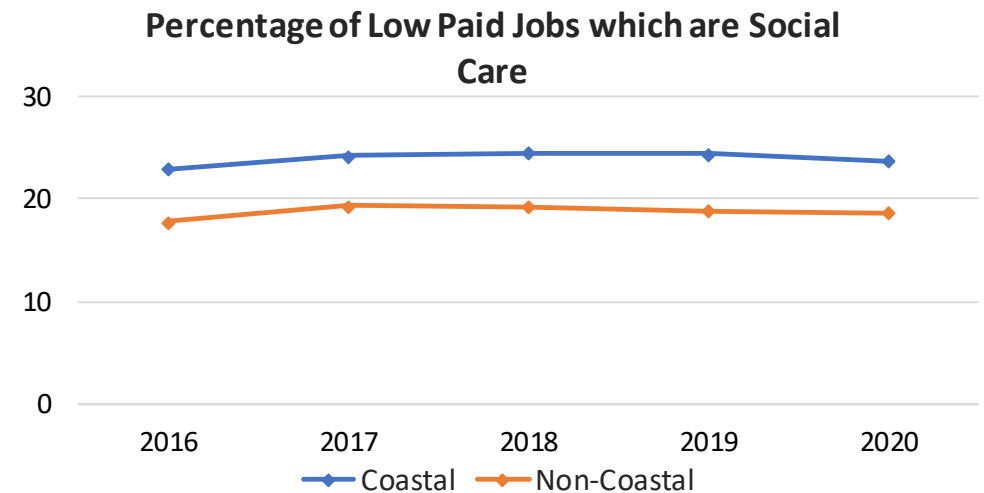
Source: ONS, BRES

# Jobs in Low Pay Sectors

- Low pay sectors are those where the median hourly wage is 20% or more below the national all-sector median wage
- Coastal communities have a higher proportion of jobs in low pay sectors compared to non-coastal communities
- One sector difference between coastal and non-coastal communities which contributes to this is the higher proportion of jobs in the social care sector
- The coastal towns with the highest proportion of low paid jobs are Walton, Deal, Clacton and Herne Bay



	2016	2017	2018	2019	2020
Coastal	36.1	37.3	37.2	38.2	37.2
Non-Coastal	29.2	30.0	29.8	30.0	29.3



	2016	2017	2018	2019	2020
Coastal	23.0	24.2	24.5	24.4	23.7
Non-Coastal	17.8	19.3	19.2	18.9	18.7

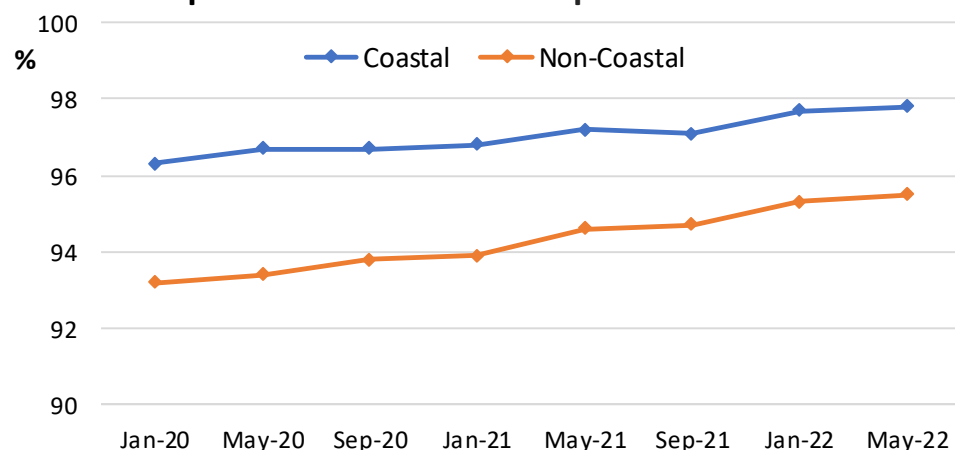
Source: ONS, BRES



# Broadband Access

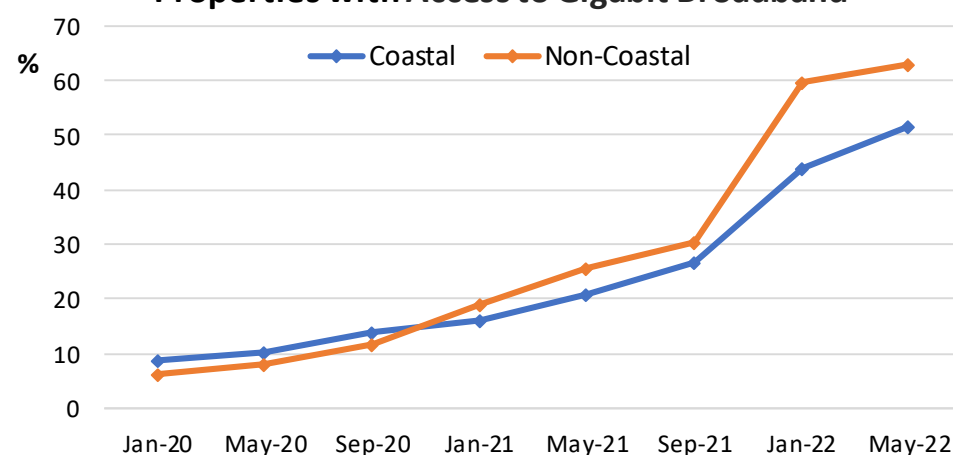
- Coastal communities overall enjoy slightly better access to superfast broadband than non-coastal communities, with most not-spots being in inland rural areas
- Gigabit broadband is now being rolled out rapidly across the country and while coastal communities are currently lagging behind in the roll out, they have still seen a significant increase in availability so far this year
- Note that data relates to availability of a service and information on take-up of a service is not currently available - take-up can be constrained by income and skill levels

**Properties with Access to Superfast Broadband**



	Jan-20	May-20	Sep-20	Jan-21	May-21	Sep-21	Jan-22	May-22
Coastal	96.3	96.7	96.7	96.8	97.2	97.1	97.7	97.8
Non-Coastal	93.2	93.4	93.8	93.9	94.6	94.7	95.3	95.5

**Properties with Access to Gigabit Broadband**



	Jan-20	May-20	Sep-20	Jan-21	May-21	Sep-21	Jan-22	May-22
Coastal	8.7	10.2	13.8	15.9	20.8	26.6	43.8	51.5
Non-Coastal	6.2	7.9	11.8	19.0	25.5	30.4	59.7	63.1

Source: OFCOM, Connected Nations



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