



SOUTH EAST
LOCAL ENTERPRISE
PARTNERSHIP

Key Indicators Report

Coastal Catalyst

December 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

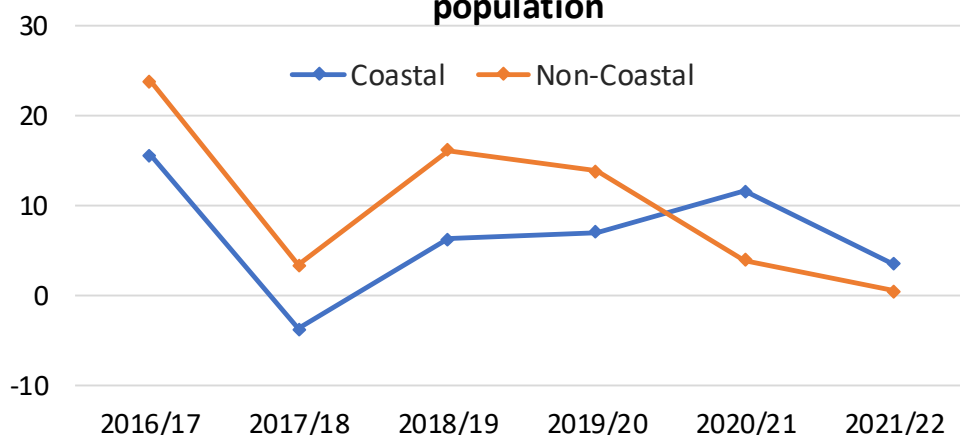
(Note: coastal communities are defined in accordance with SELEP Coastal Community Health Report, September 2021)



Enterprise Growth

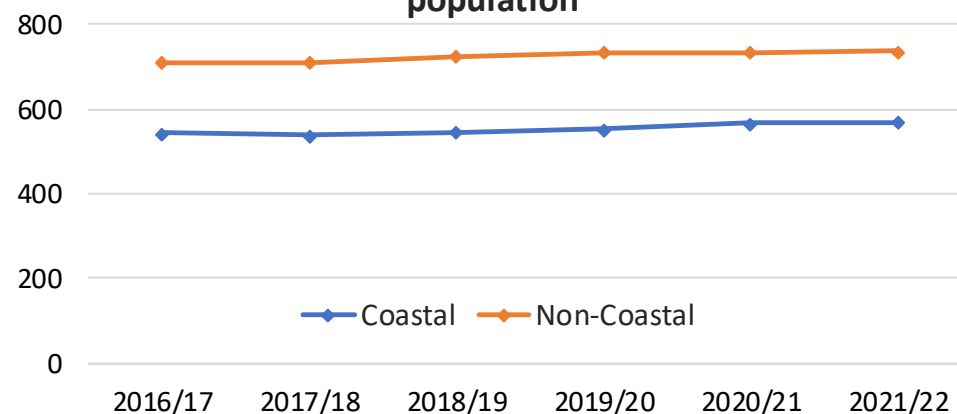
- Coastal communities for years have previously seen lower enterprise growth than non-coastal communities
- The pandemic saw a reversal of this situation with coastal communities seeing a larger enterprise growth rate, with staycations having been a contributing factor
- However the stock of enterprises 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	2021/22
Coastal	15.6	-3.8	6.2	7.0	11.6	3.4
Non-Coastal	23.8	3.3	16.1	13.8	3.9	0.5

Stock of enterprises per 10,000 working age population

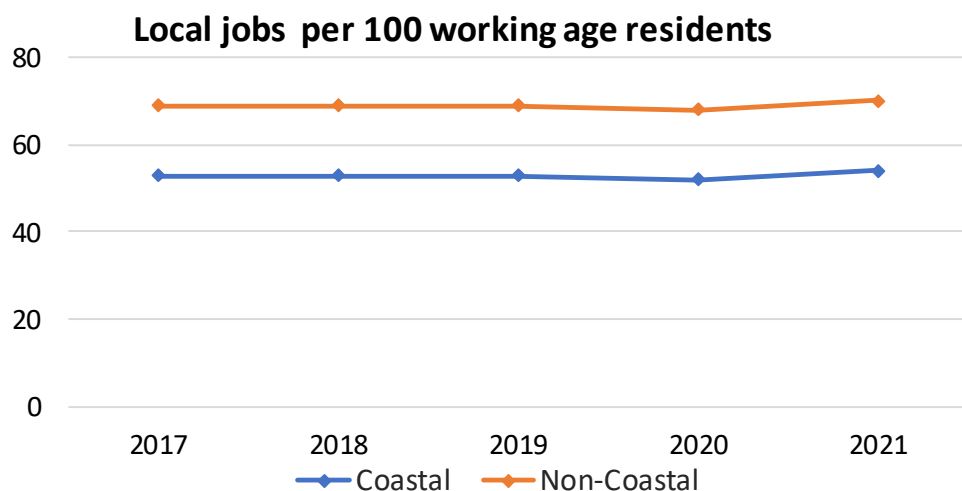


	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Coastal	543	538	545	552	565	569
Non-Coastal	710	710	723	733	734	735

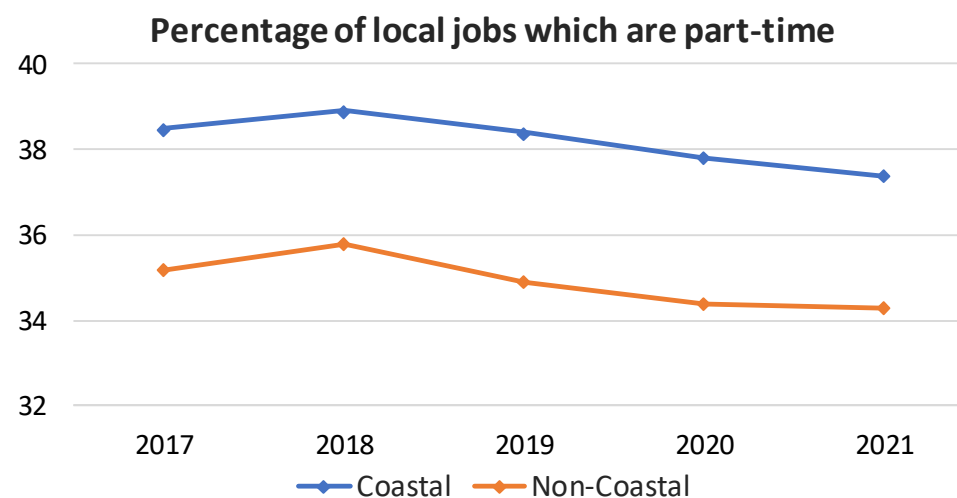
Source: ONS, UK Business Counts

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



	2017	2018	2019	2020	2021
Coastal	53	53	53	52	54
Non-Coastal	69	69	69	68	70

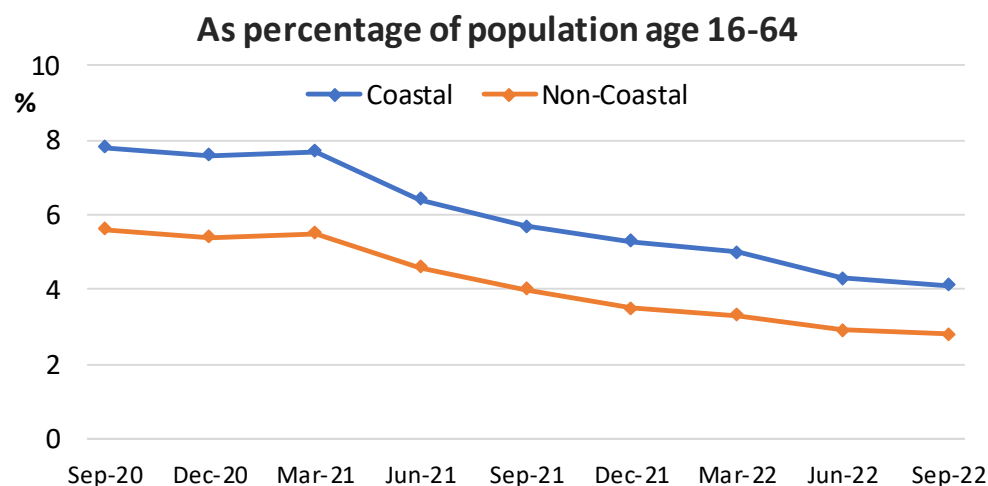


	2017	2018	2019	2020	2021
Coastal	38.5	38.9	38.4	37.8	37.4
Non-Coastal	35.2	35.8	34.9	34.4	34.3

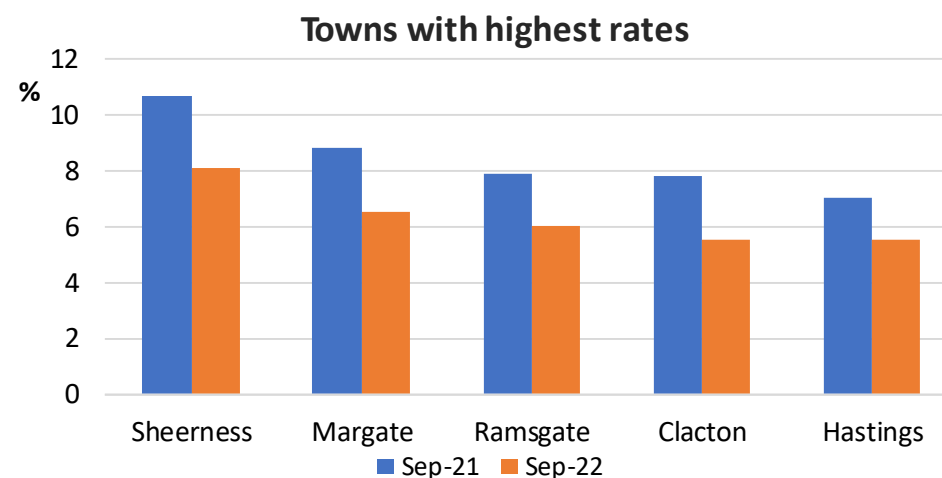
Source: ONS, BRES

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 1.3%
- 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



	Sep-20	Dec-20	Mar-21	Jun-21	Sep-21	Dec-21	Mar-22	Jun-22	Sep-22
Coastal	7.8	7.6	7.7	6.4	5.7	5.3	5.0	4.3	4.1
Non-Coastal	5.6	5.4	5.5	4.6	4.0	3.5	3.3	2.9	2.8



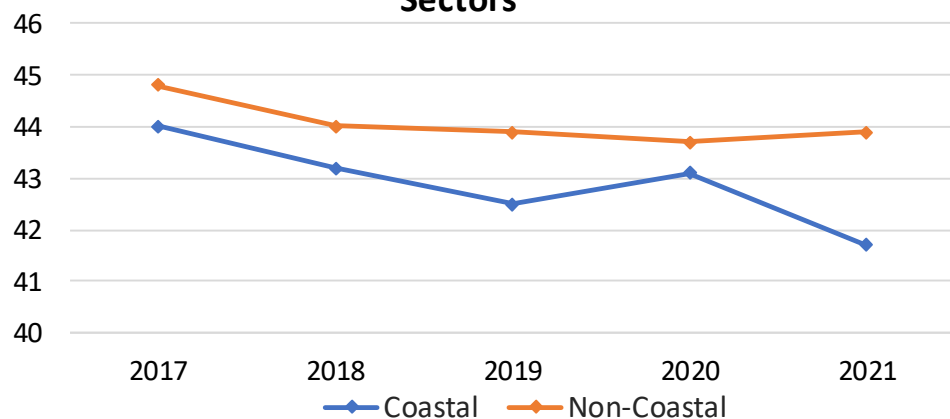
	Sheerness	Margate	Ramsgate	Clacton	Hastings
Sep-21	10.7	8.8	7.9	7.8	7.0
Sep-22	8.1	6.5	6.0	5.5	5.5

Source: ONS, Claimant Count

Knowledge Intensive Jobs

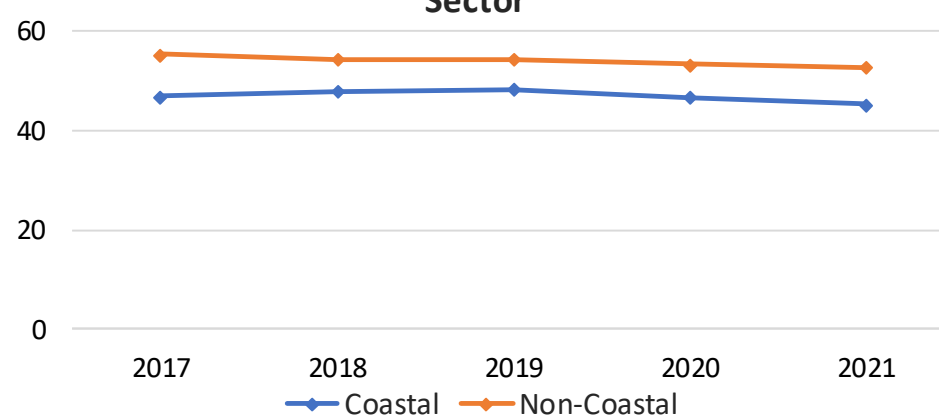
- Knowledge Intensive sectors are those which have a higher proportion of employees with a level 4 or above qualification than the all-sector national average
- There is a lower proportion of jobs in knowledge intensive sectors in coastal communities, with the proportion having reduced in recent years
- 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



	2017	2018	2019	2020	2021
Coastal	44.0	43.2	42.5	43.1	41.7
Non-Coastal	44.8	44.0	43.9	43.7	43.9

Knowledge Intensive Jobs which are Private Sector

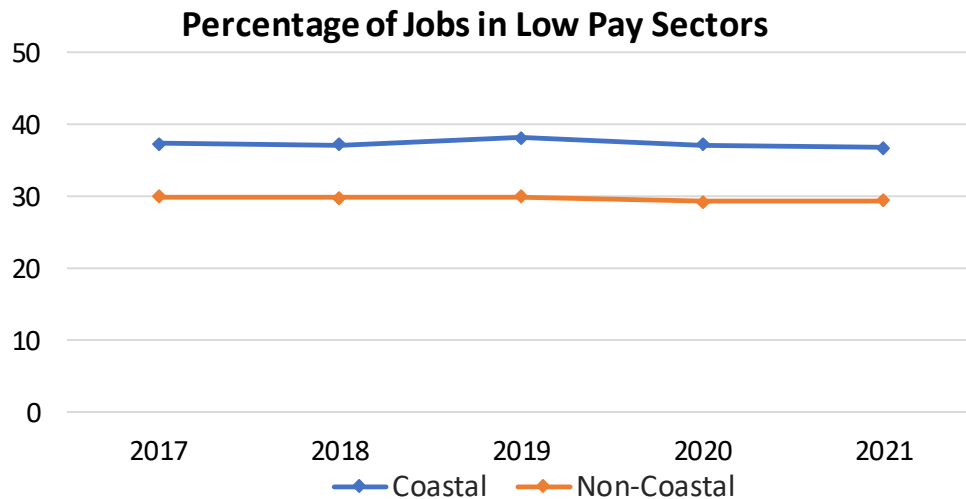


	2017	2018	2019	2020	2021
Coastal	46.8	47.7	48.2	46.6	45.2
Non-Coastal	55.2	54.3	54.3	53.3	52.6

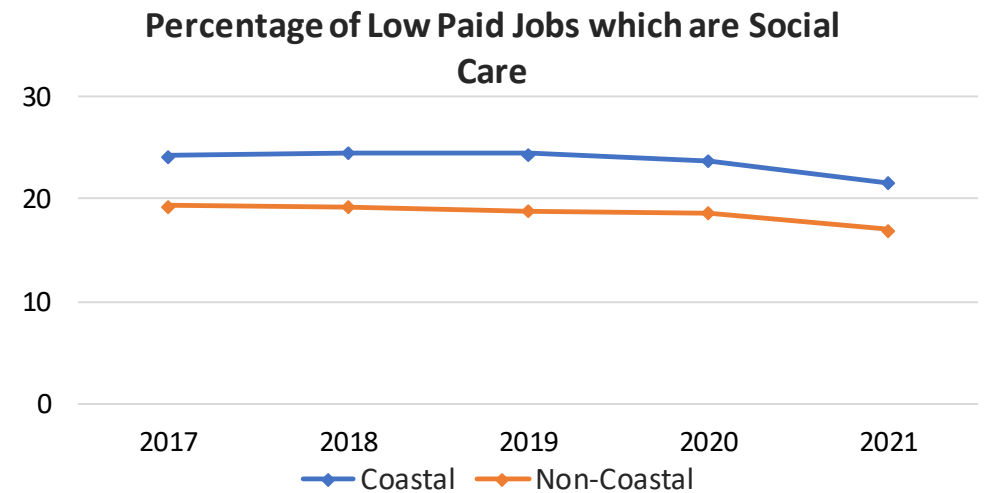
Source: ONS, BRES

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



	2017	2018	2019	2020	2021
Coastal	37.3	37.2	38.2	37.2	36.8
Non-Coastal	30.0	29.8	30.0	29.3	29.4



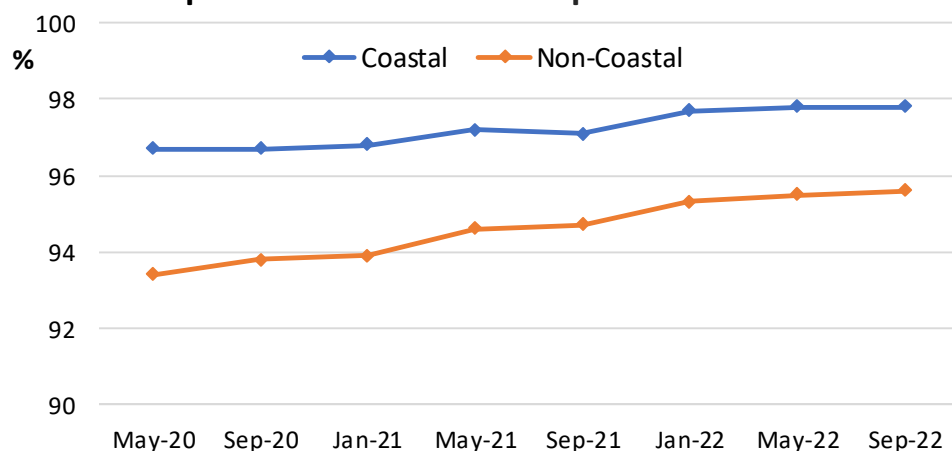
	2017	2018	2019	2020	2021
Coastal	24.2	24.5	24.4	23.7	21.6
Non-Coastal	19.3	19.2	18.9	18.7	17.0

Source: ONS, BRES

Broadband Access

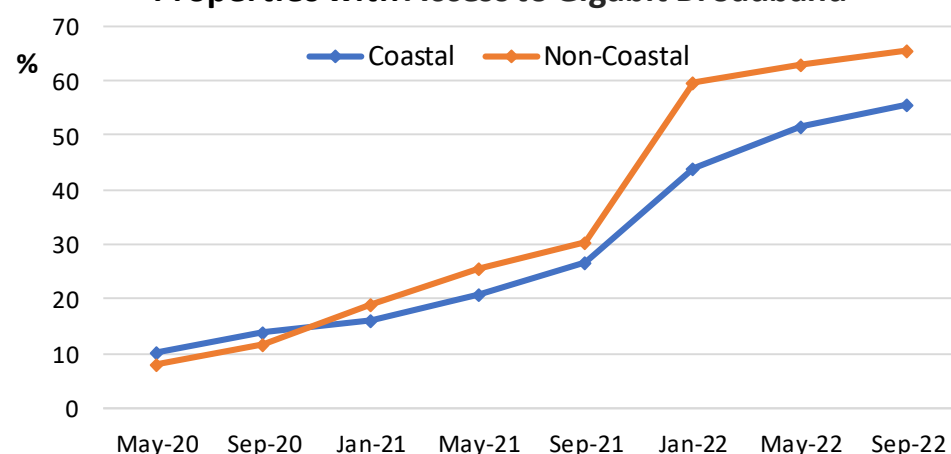
- Coastal communities overall enjoy slightly better access to superfast broadband than non-coastal communities, with most not-spots being in inland rural areas
- Gigabit broadband is now being rolled out rapidly across the country and while coastal communities are currently lagging behind in the roll out, they have still seen a significant increase in availability over the last 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



	May-20	Sep-20	Jan-21	May-21	Sep-21	Jan-22	May-22	Sep-22
Coastal	96.7	96.7	96.8	97.2	97.1	97.7	97.8	97.8
Non-Coastal	93.4	93.8	93.9	94.6	94.7	95.3	95.5	95.6

Properties with Access to Gigabit Broadband



	May-20	Sep-20	Jan-21	May-21	Sep-21	Jan-22	May-22	Sep-22
Coastal	10.2	13.8	15.9	20.8	26.6	43.8	51.5	55.8
Non-Coastal	7.9	11.8	19.0	25.5	30.4	59.7	63.1	65.5

Source: OFCOM, Connected Nations



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