



SOUTH EAST
LOCAL ENTERPRISE
PARTNERSHIP

Key Indicators Report

Communities for the Future

December 2022



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Headline Summary

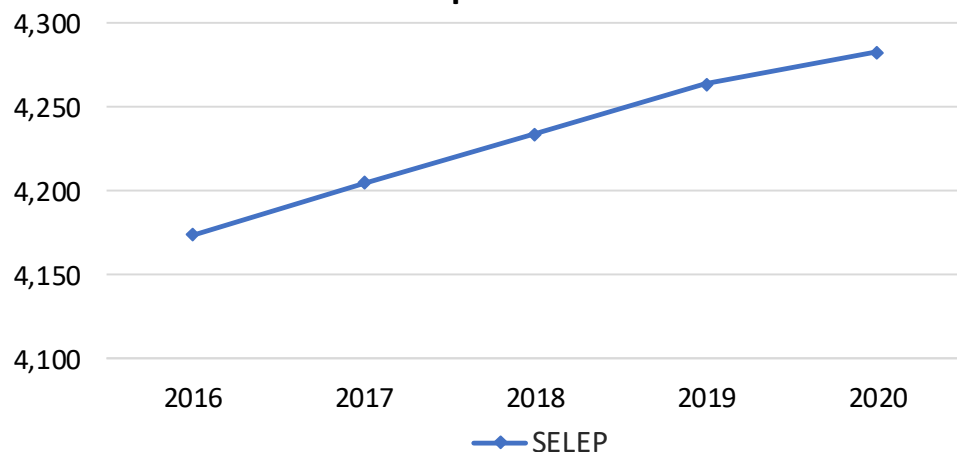
- SELEP experiences higher population growth than the national average, although growth has slowed in the last few years, with 2019 to 2020 seeing very low growth
- Completion of new dwellings dropped significantly during the first lockdown but recovered well after this, with SELEP continuing to deliver more housing relative to 2019 than the national average
- Over 86% of new dwellings so far this year achieved 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 62.5% availability to premises in September 2022
- Per capita carbon emissions have been reducing year on year but remain high for transport and domestic properties
- Workplace footfall remains at 21-29% below pre-pandemic levels across upper tier local authorities



Population

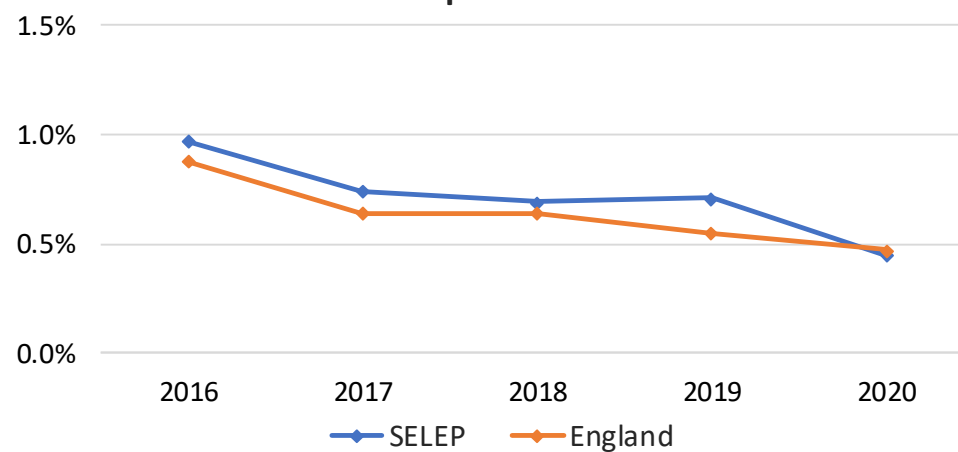
- The usual resident population in the SELEP area has in recent years been growing faster than the national average
- Annual population growth has slowed since 2016 primarily due to a lower rate of natural increase (births less deaths) following a baby boom period in prior years with inward international migration being the main driver for population growth since 2014
- The year to June 2020 saw the lowest population increase for many years and early Census 2021 results suggest population growth for SELEP may have been over-estimated by up to 40,000 since the last census in 2011

Usual Resident Population - in thousands



	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

Annual Population Growth



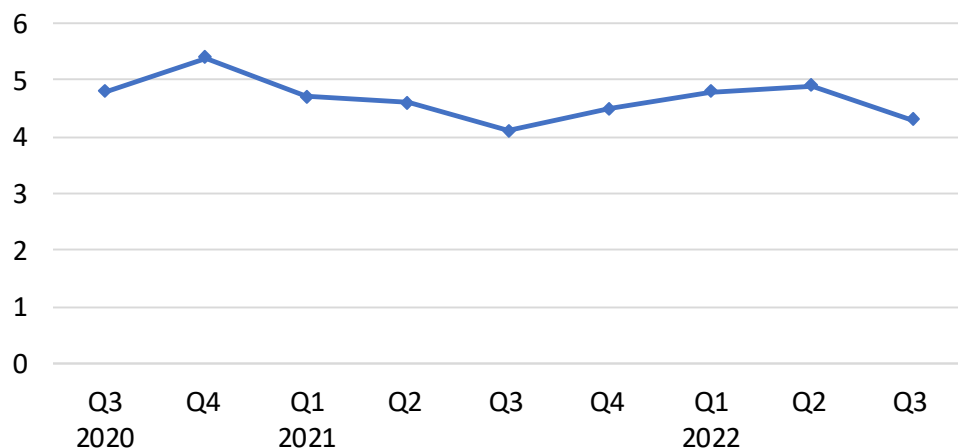
	2016	2017	2018	2019	2020
SELEP	0.97%	0.74%	0.69%	0.71%	0.45%
England	0.88%	0.64%	0.64%	0.55%	0.47%

Source: ONS, Mid-year population estimates

New Dwellings

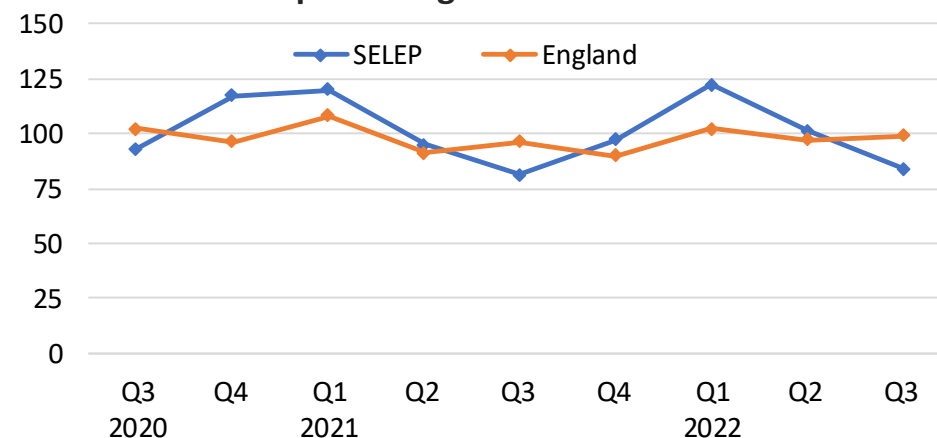
- Completion of new build dwellings (based on energy performance certificates) were only temporarily disrupted by COVID restrictions and delivery has been high since quarter 3 of 2020
- Dwelling completions in the later part of 2020 were at a level above that seen in 2019
- Since late 2020 SELEP delivery compared to 2019 has been better than national in most quarters

SELEP - in thousands



	2020		2021		2022				
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
SELEP	4.8	5.4	4.7	4.6	4.1	4.5	4.8	4.9	4.3
England	63.3	65.3	63.0	60.6	59.1	61.2	59.0	64.8	61.2

As a percentage of 2019 numbers



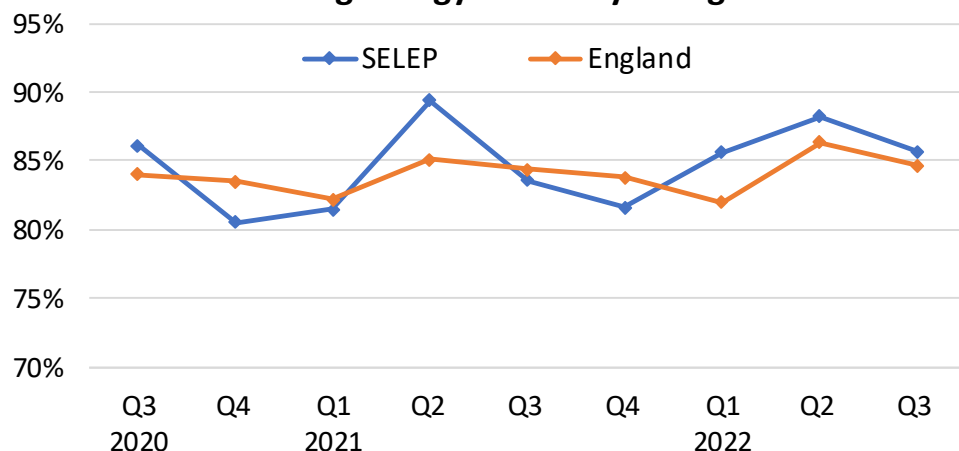
	2020		2021		2022				
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
SELEP	93	117	120	95	81	97	122	101	84
England	102	96	108	91	96	90	102	97	99

Source: DLUHC, Live Tables NB4

New Dwelling Energy Efficiency

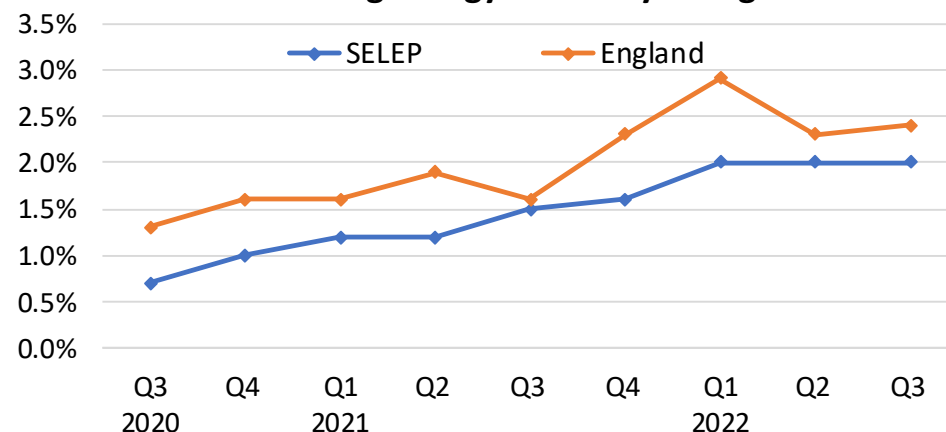
- More than 80% of new build dwellings achieve an energy performance certificate rating of A or B
- However, only a small percentage achieve the top rating of A, although this proportion has been increasing over time
- The remainder of new build dwellings mostly achieve a rating of C (just under 10%)
- A small proportion of new build dwellings (6.3%) do not achieve a rating of at least C, with about 0.1% failing to achieve a minimum standard of at least E

New dwelling energy efficiency rating - A & B



	2020		2021		2022				
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
SELEP	86%	81%	82%	89%	84%	82%	86%	88%	86%
England	84%	84%	82%	85%	84%	84%	82%	86%	85%

New dwelling energy efficiency rating - A

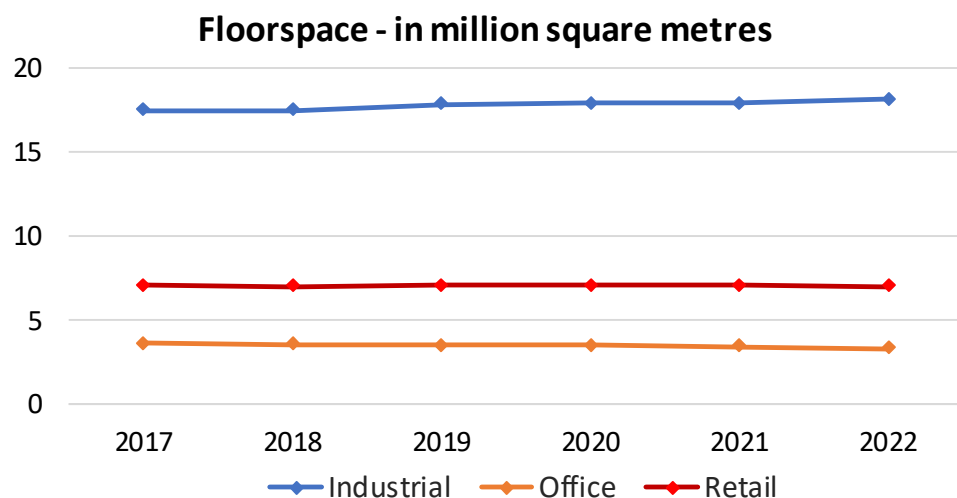


	2020		2021		2022				
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
SELEP	0.7%	1.0%	1.2%	1.2%	1.5%	1.6%	2.0%	2.0%	2.0%
England	1.3%	1.6%	1.6%	1.9%	1.6%	2.3%	2.9%	2.3%	2.4%

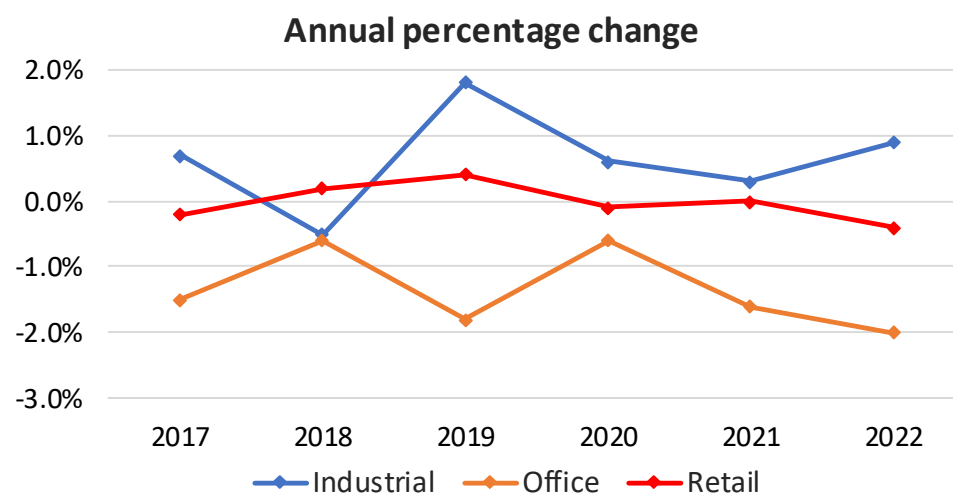
Source: DLUHC, Live Tables NB1

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 over the last 5 years
- 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	2022
Industrial	17.5	17.5	17.8	17.9	17.9	18.1
Office	3.6	3.6	3.5	3.5	3.4	3.3
Retail	7.0	7.0	7.1	7.1	7.1	7.0



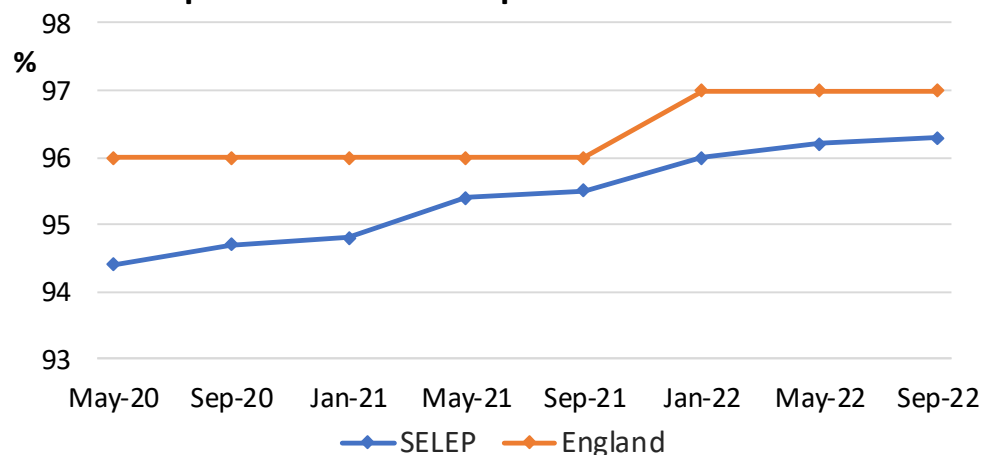
	2017	2018	2019	2020	2021	2022
Industrial	0.7%	-0.5%	1.8%	0.6%	0.3%	0.9%
Office	-1.5%	-0.6%	-1.8%	-0.6%	-1.6%	-2.0%
Retail	-0.2%	0.2%	0.4%	-0.1%	0.0%	-0.4%

Source: VOA, Non-domestic stock of properties

Broadband availability

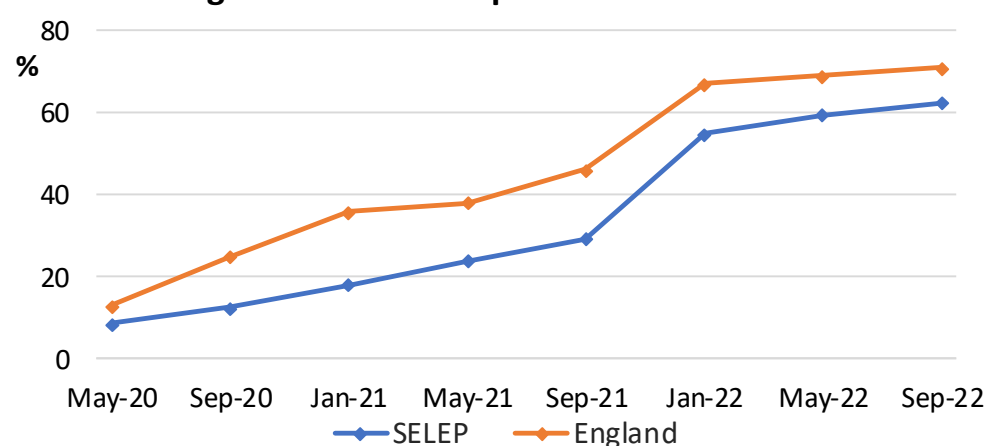
- 96% of all premises (domestic and non-domestic) have access to superfast broadband (30Mbit/s or better)
- The focus of government is now on roll-out of gigabit broadband
- The roll-out of gigabit broadband is proceeding at pace, although the SELEP area lags behind the England average
- Access to, or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

Superfast broadband - premises with access



	May-20	Sep-20	Jan-21	May-21	Sep-21	Jan-22	May-22	Sep-22
SELEP	94.4	94.7	94.8	95.4	95.5	96.0	96.2	96.3
England	96	96	96	96	96	97	97	97

Gigabit broadband - premises with access



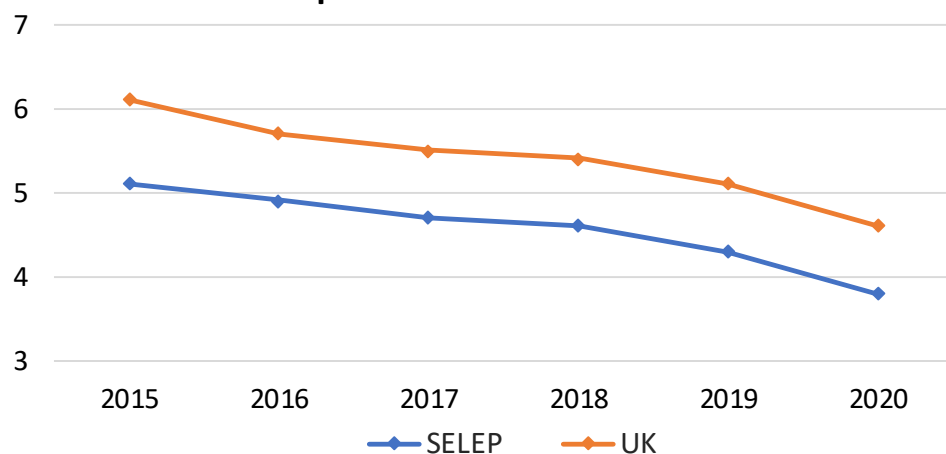
	May-20	Sep-20	Jan-21	May-21	Sep-21	Jan-22	May-22	Sep-22
SELEP	8.6	12.4	18.0	24.0	29.2	54.8	59.5	62.5
England	13	25	36	38	46	67	69	71

Source: OFCOM, Connected Nations

Carbon Emissions

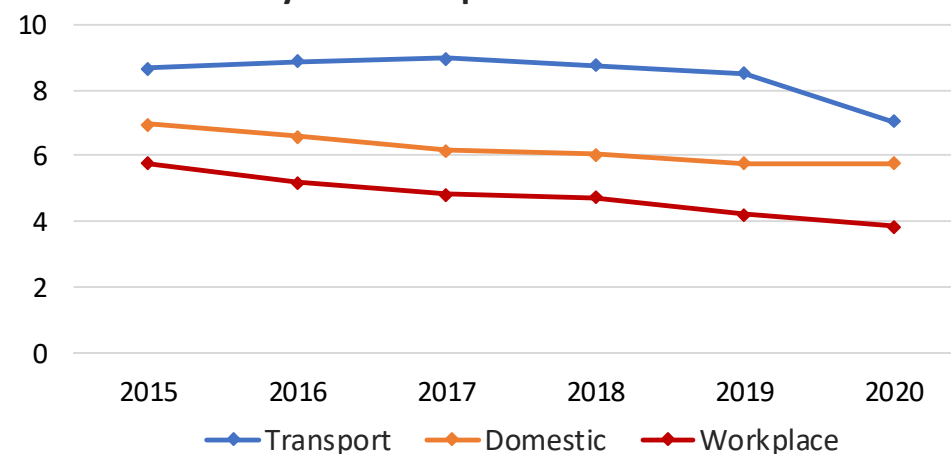
- Per capita carbon emissions have been reducing at a steady rate in recent years
- Much of the reduction has been delivered through a switch to renewable electricity generation
- The challenges for the future are mainly around transport and domestic emissions
- The switch to electric vehicles and the need for retrofit of existing dwelling stock are essential to deliver further reductions in emissions
- Transport emissions were low in 2020 due to lockdowns and reduced air travel

Per capita tonnes CO2 emissions



	2015	2016	2017	2018	2019	2020
SELEP	5.1	4.9	4.7	4.6	4.3	3.8
UK	6.1	5.7	5.5	5.4	5.1	4.6

SELEP by sector - equivalent million tonnes



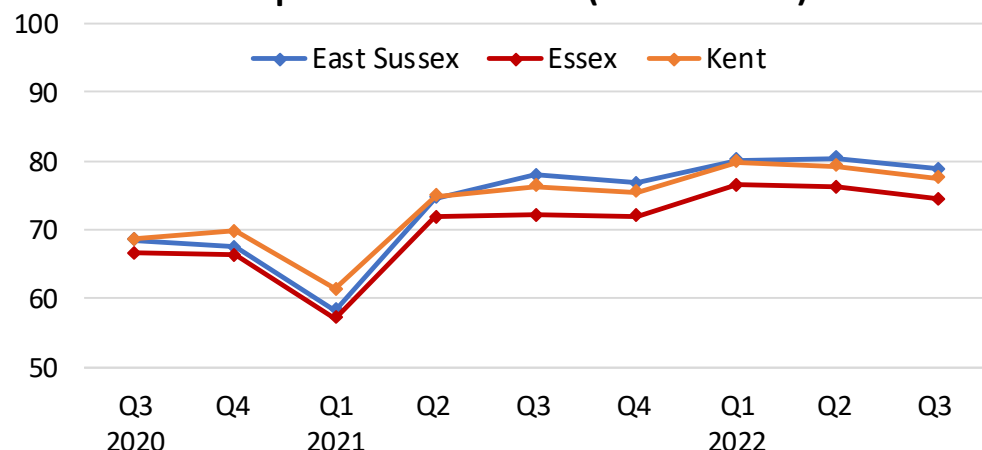
	2015	2016	2017	2018	2019	2020
Transport	8.7	8.9	9.0	8.8	8.5	7.1
Domestic	7.0	6.6	6.2	6.0	5.8	5.8
Workplace	5.8	5.2	4.8	4.7	4.2	3.9

Source: BEIS, local authority carbon emission estimates

Workplace Footfall

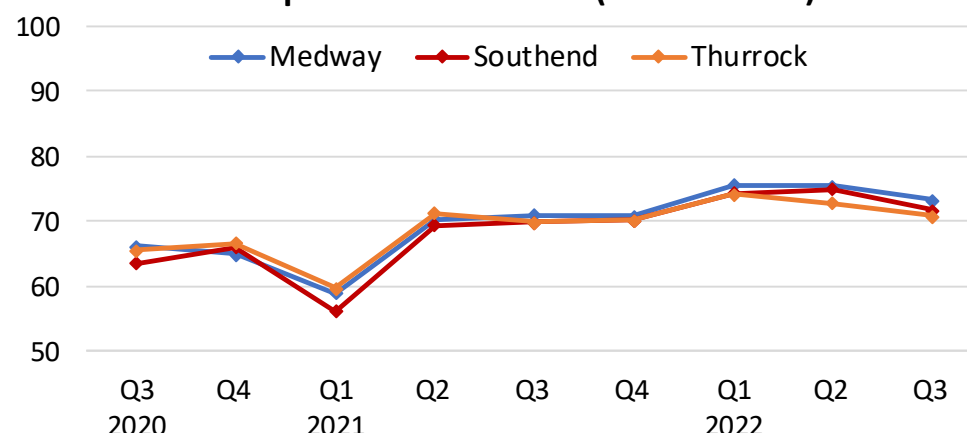
- During the pandemic Google began to make available reports created with from Google Maps using aggregated, anonymized sets of data from users who have turned on the Location History setting, which is off by default
- The resulting datasets provide some insight into movements over time, by place and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

Workplace Footfall Index (Feb-20 = 100)



	2020		2021		2022				
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
East Sussex	69	68	58	75	78	77	80	80	79
Essex	67	66	57	72	72	72	77	76	74
Kent	69	70	61	75	76	76	80	79	78

Workplace Footfall Index (Feb-20 = 100)



	2020		2021		2022				
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
Medway	66	65	59	70	71	71	76	75	73
Southend	64	66	56	69	70	70	74	75	72
Thurrock	66	67	60	71	70	70	74	73	71


Source: Google Community Mobility Reports




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