



SOUTH EAST
LOCAL ENTERPRISE
PARTNERSHIP

Key Indicators Report

Coastal Catalyst

June 2023



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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. Coastal enterprise growth was also slightly higher in 2021/22.
- Job density is lower in coastal communities and a higher proportion of jobs are part time.
- With a lower availability of local jobs, the claimant rate is higher in coastal communities and also rose more during the pandemic.
- 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 slightly lagging behind for coastal areas, but with availability increasing rapidly nevertheless.

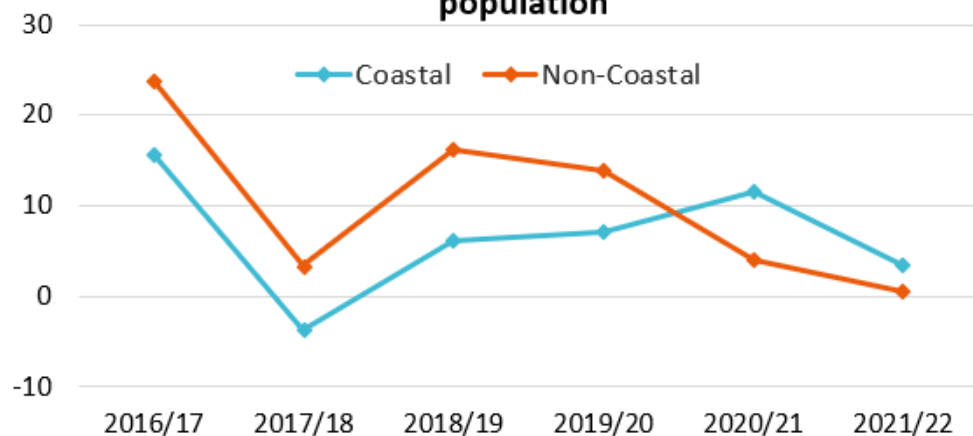
(Note: coastal communities are defined in accordance with SELEP Coastal Community Health Report, September 2021)



Enterprise Growth

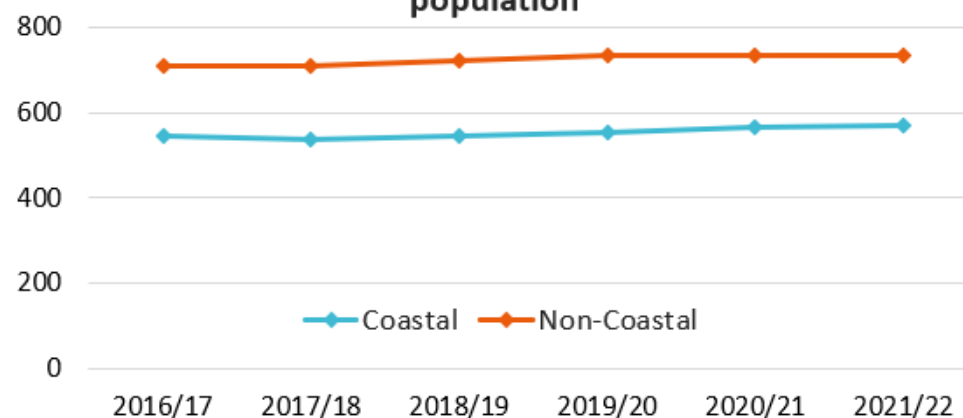
- Coastal communities for years have previously seen lower enterprise growth than non-coastal communities.
- The pandemic saw a reversal of this situation with coastal communities seeing a larger enterprise growth rate, with staycations being a contributing factor.
- However, the stock of enterprises in coastal communities remain far below the levels in non-coastal communities.
- The 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

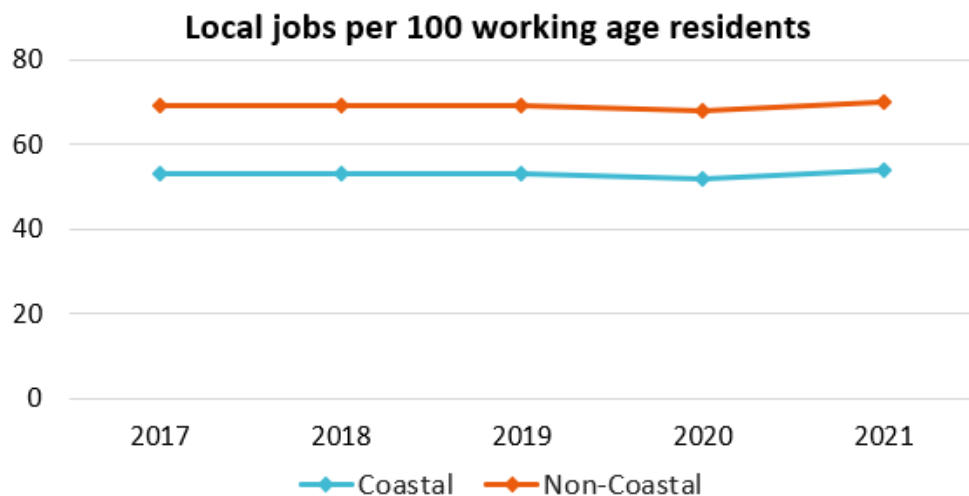


	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Coastal	543	538	545	552	565	569
Non-Coastal	710	710	723	733	734	735

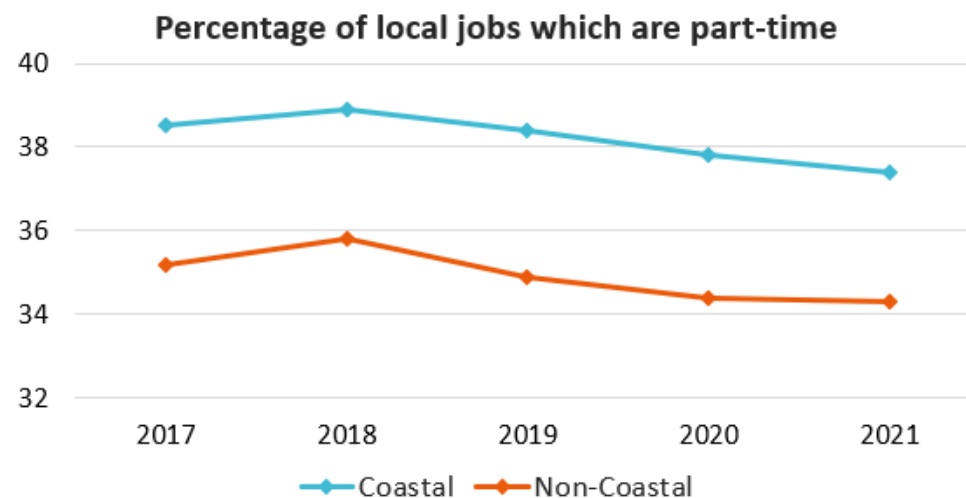
Source: ONS, UK Business Counts

Job Density

- Across SELEP, Job Density levels are significantly lower in coastal communities than in 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

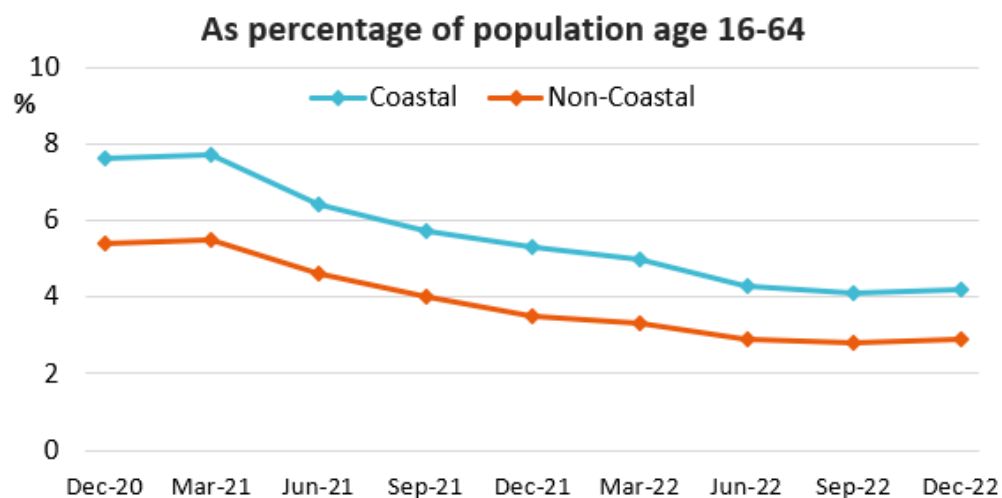


	2017	2018	2019	2020	2021
Coastal	38.5	38.9	38.4	37.8	37.4
Non-Coastal	35.2	35.8	34.9	34.4	34.3

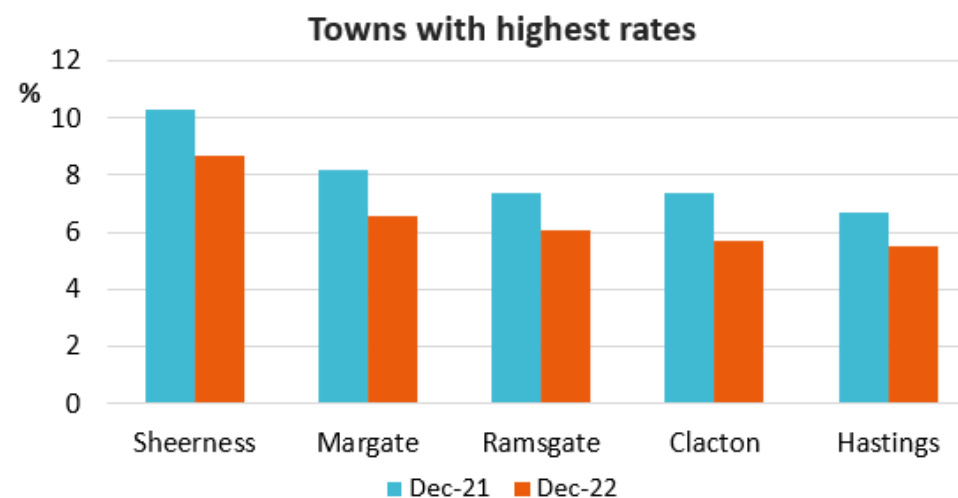
Source: ONS, BRES

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 had been reducing since March 2021 until a slight rise in December 2022 and whilst still above pre-pandemic levels, the gap between coastal and non-coastal communities has fallen to 1.3%.
- Not all coastal communities have high claimant rates, but some have very high rates. Sheerness, Margate, Ramsgate, Clacton and Hastings have the highest rates.



	Dec-20	Mar-21	Jun-21	Sep-21	Dec-21	Mar-22	Jun-22	Sep-22	Dec-22
Coastal	7.6	7.7	6.4	5.7	5.3	5.0	4.3	4.1	4.2
Non-Coastal	5.4	5.5	4.6	4.0	3.5	3.3	2.9	2.8	2.9

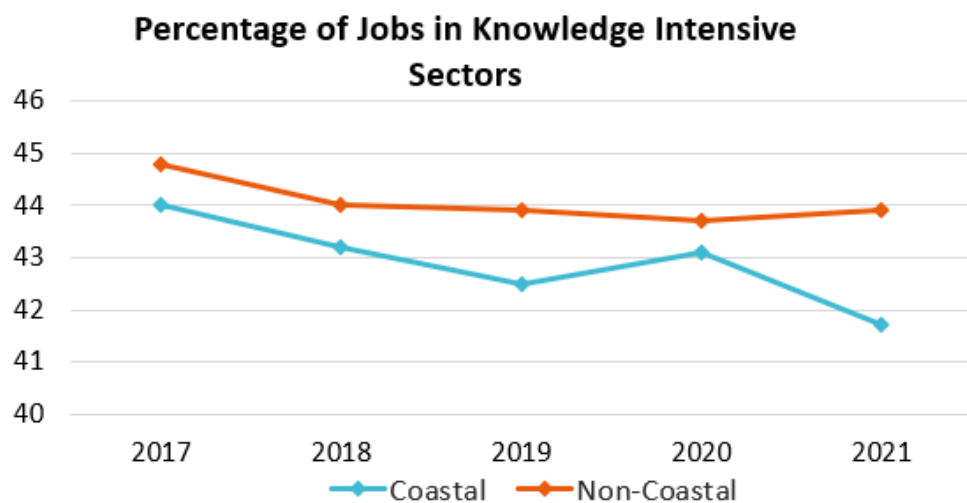


	Sheerness	Margate	Ramsgate	Clacton	Hastings
Dec-21	10.3	8.2	7.4	7.4	6.7
Dec-22	8.7	6.6	6.1	5.7	5.5

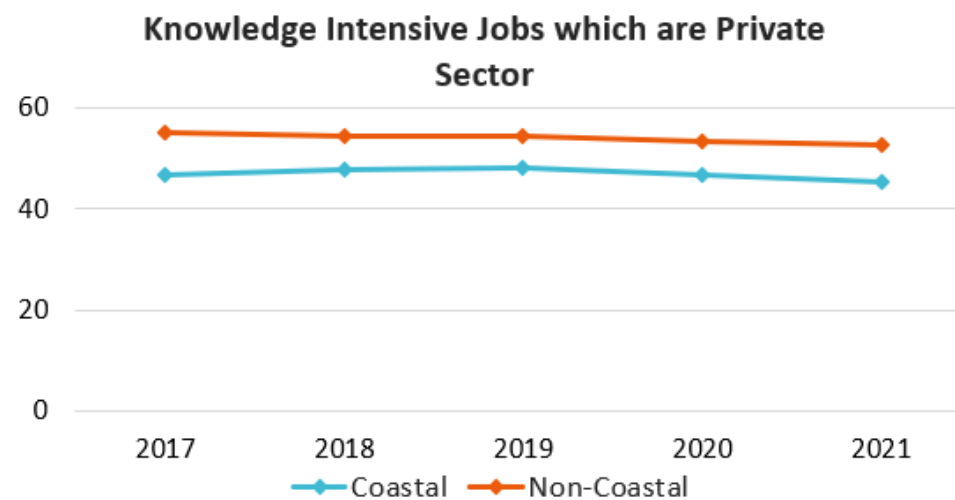
Source: ONS, Claimant Count

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 reducing steeply in 2021 after a slight increase in 2020.
- 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.



	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



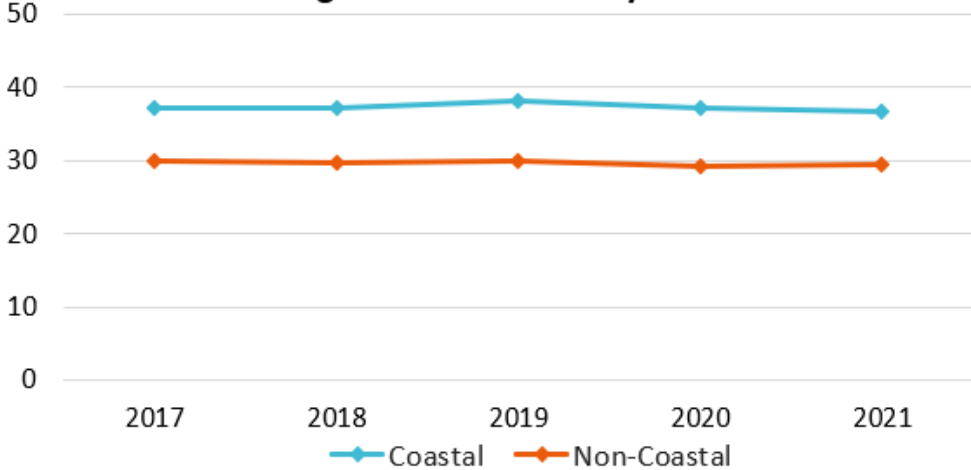
	2017	2018	2019	2020	2021
Coastal	46.8	47.7	48.2	46.6	45.2
Non-Coastal	55.2	54.3	54.3	53.3	52.6

Source: ONS, BRES

Jobs in Low Pay Sectors

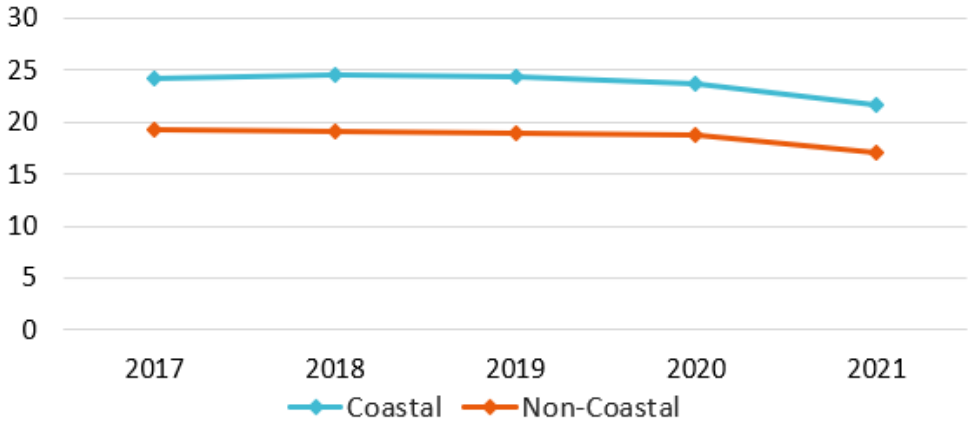
- Low pay sectors are those where the median hourly wage is 20% or more below the national all-sector median wage.
- Coastal communities have a higher proportion of jobs in low pay sectors compared to non-coastal communities.
- One sector difference between coastal and non-coastal communities which contributes 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.

Percentage of Jobs in Low Pay Sectors



	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

Percentage of Low Paid Jobs which are Social Care

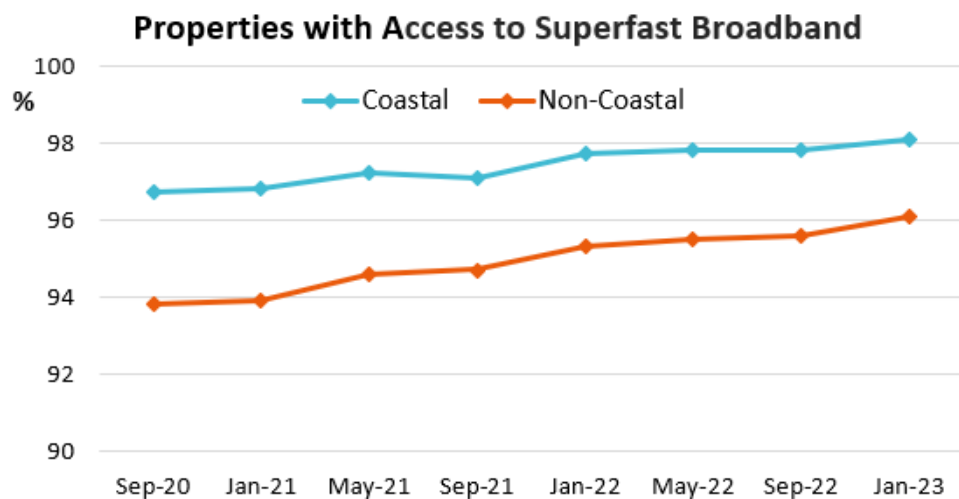


	2017	2018	2019	2020	2021
Coastal	24.2	24.5	24.4	23.7	21.6
Non-Coastal	19.3	19.2	18.9	18.7	17.0

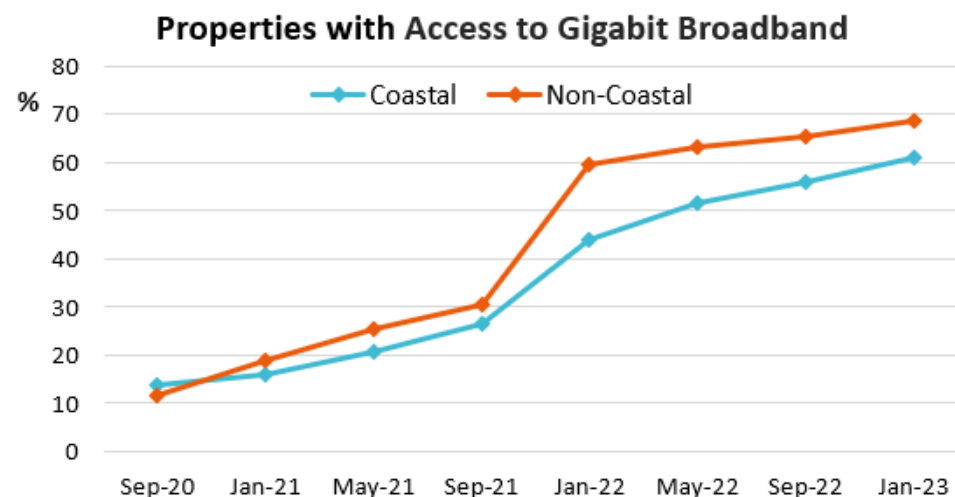
Source: ONS, BRES

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 being rolled out rapidly across the country and whilst coastal communities are currently lagging behind in the roll out, they have still seen a significant increase in availability over the last year and the discrepancy is decreasing.
- 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.



	Sep-20	Jan-21	May-21	Sep-21	Jan-22	May-22	Sep-22	Jan-23
Coastal	96.7	96.8	97.2	97.1	97.7	97.8	97.8	98.1
Non-Coastal	93.8	93.9	94.6	94.7	95.3	95.5	95.6	96.1



	Sep-20	Jan-21	May-21	Sep-21	Jan-22	May-22	Sep-22	Jan-23
Coastal	13.8	15.9	20.8	26.6	43.8	51.5	55.8	61.1
Non-Coastal	11.8	19.0	25.5	30.4	59.7	63.1	65.5	68.7

Source: OFCOM, Connected Nations



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