

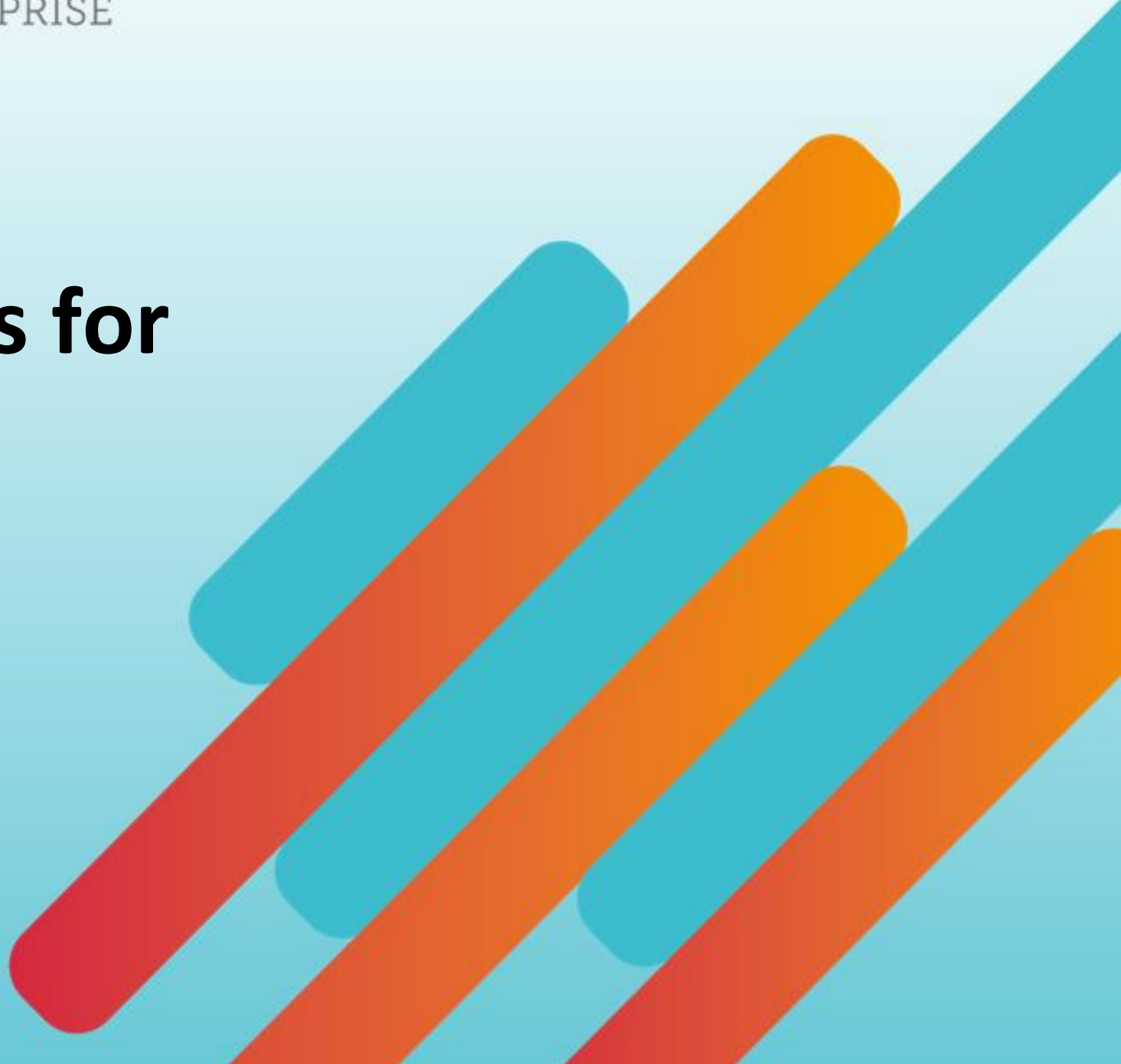


SOUTH EAST  
LOCAL ENTERPRISE  
PARTNERSHIP

**Key Indicators Report**

# **Communities for the Future**

June 2023



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# Headline Summary

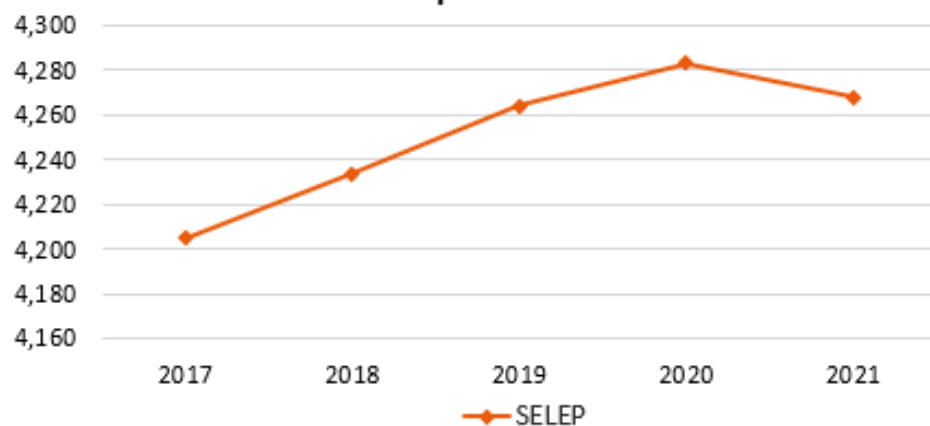
- SELEP's usual resident population fell in 2021, following above average growth in recent years.
- Completion of new dwellings dropped significantly during the first lockdown but recovered well after this, with SELEP continuing to deliver more housing relative to 2019 than the national average. This was especially true in Q4 2022.
- 86% of new dwellings in 2022 achieved an energy performance rating of A or B, although only a minority were rated A (<3%).
- 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.
- Roll-out of gigabit broadband is proceeding at a pace, with 66.6% availability to SELEP premises in January 2023.
- Per capita carbon emissions have been reducing year on year but remain high for transport and domestic properties.
- Workplace footfall remains 21-29% below pre-pandemic levels across upper tier local authorities in 2022.



# Population

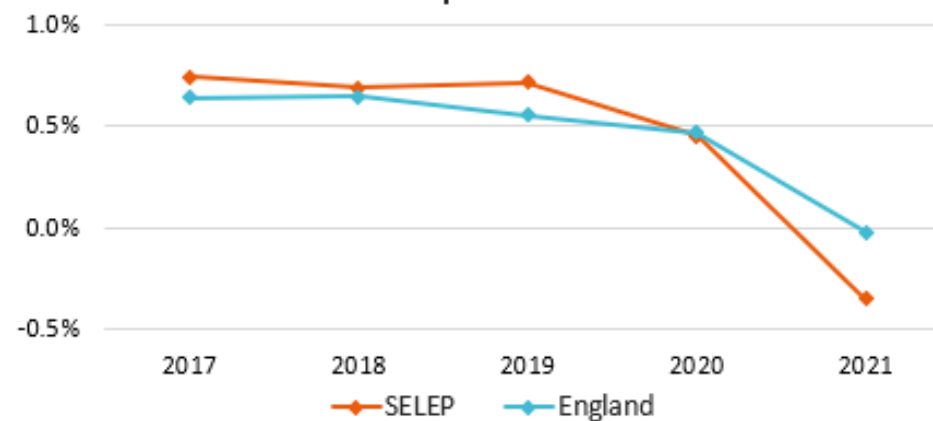
- The usual resident population in the SELEP had been growing faster than the national average in recent years, however the latest mid-year population estimates suggest a 0.35% fall.
- Annual population growth has been slowing since 2016, primarily due to a lower rate of natural increase (births less deaths) following a baby boom in prior years, with inward international migration being the main driver for population growth since 2014.
- 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**



|         | 2017   | 2018   | 2019   | 2020   | 2021   |
|---------|--------|--------|--------|--------|--------|
| SELEP   | 4,205  | 4,234  | 4,264  | 4,283  | 4,268  |
| England | 55,619 | 55,977 | 56,287 | 56,550 | 56,536 |

**Annual Population Growth**



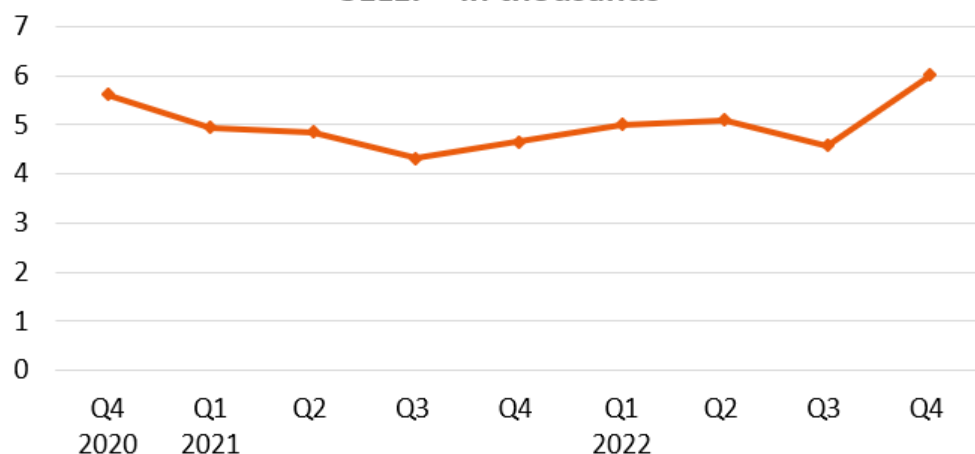
|         | 2017  | 2018  | 2019  | 2020  | 2021   |
|---------|-------|-------|-------|-------|--------|
| SELEP   | 0.74% | 0.69% | 0.71% | 0.45% | -0.35% |
| England | 0.64% | 0.64% | 0.55% | 0.47% | -0.02% |

Source: ONS, Mid-year population estimates

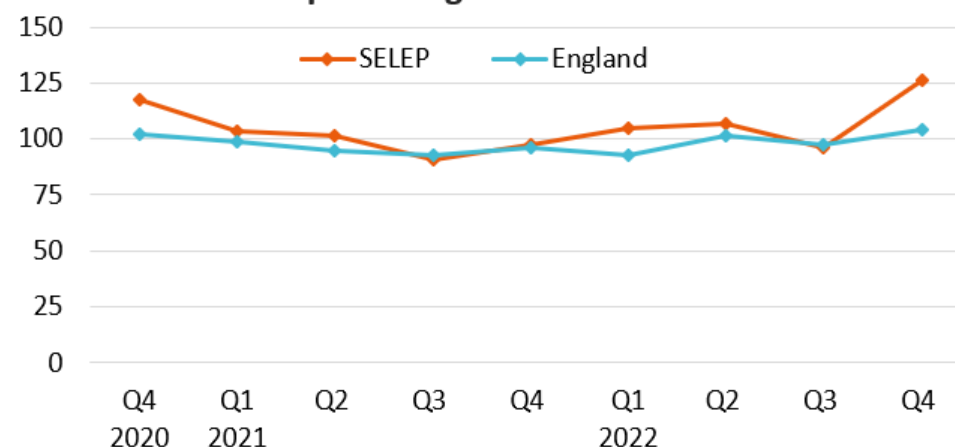
# New Dwellings

- Completion of new build dwellings (based on energy performance certificates) were only temporarily disrupted by COVID restrictions and delivery has been high since Q3 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 largely been better than national, with a clear discrepancy in Q4 2022.
- Q4 2022 saw a record high net new build dwellings for a single quarter in the SELEP region, also resulting in 2022 being a record year for certificates issued.

SELEP - in thousands



As a percentage of 2019 numbers



|                | 2020 |      | 2021 |      | 2022 |      |      |      |      |
|----------------|------|------|------|------|------|------|------|------|------|
|                | Q4   | Q1   | Q2   | Q3   | Q4   | Q1   | Q2   | Q3   | Q4   |
| <b>SELEP</b>   | 5.6  | 4.9  | 4.8  | 4.3  | 4.7  | 5.0  | 5.1  | 4.6  | 6.0  |
| <b>England</b> | 65.3 | 63.0 | 60.6 | 59.1 | 61.2 | 59.0 | 64.8 | 62.3 | 66.4 |

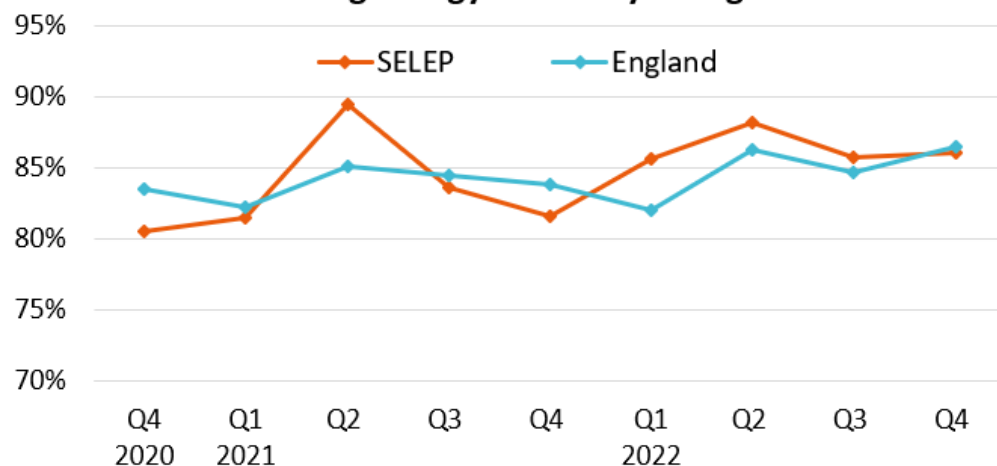
|                | 2020 |     | 2021 |    | 2022 |     |     |    |     |
|----------------|------|-----|------|----|------|-----|-----|----|-----|
|                | Q4   | Q1  | Q2   | Q3 | Q4   | Q1  | Q2  | Q3 | Q4  |
| <b>SELEP</b>   | 118  | 103 | 102  | 90 | 98   | 105 | 107 | 96 | 126 |
| <b>England</b> | 102  | 99  | 95   | 93 | 96   | 92  | 102 | 98 | 104 |

Source: DLUHC, Live Tables NB4

# New Dwelling Energy Efficiency

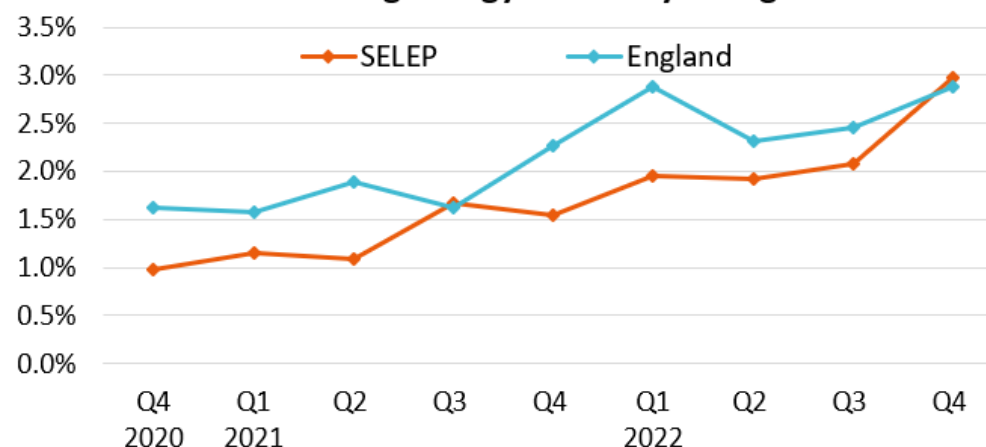
- More than 80% of new build dwellings achieve an energy performance certificate rating of A or B.
- However, only a small percentage achieve the top rating of A, although this proportion has been increasing over time and in Q4 2022 SELEP had a higher proportion of A ratings than the national rate for the first time since Q3 2021.
- The remainder of new build dwellings normally 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 roughly 0.1% failing to achieve a minimum standard of at least E.

### New dwelling energy efficiency rating - A & B



|                | 2020 |     | 2021 |     |     | 2022 |     |     |     |
|----------------|------|-----|------|-----|-----|------|-----|-----|-----|
|                | Q4   | Q1  | Q2   | Q3  | Q4  | Q1   | Q2  | Q3  | Q4  |
| <b>SELEP</b>   | 81%  | 82% | 89%  | 84% | 82% | 86%  | 88% | 86% | 86% |
| <b>England</b> | 84%  | 82% | 85%  | 84% | 84% | 82%  | 86% | 85% | 87% |

### New dwelling energy efficiency rating - A

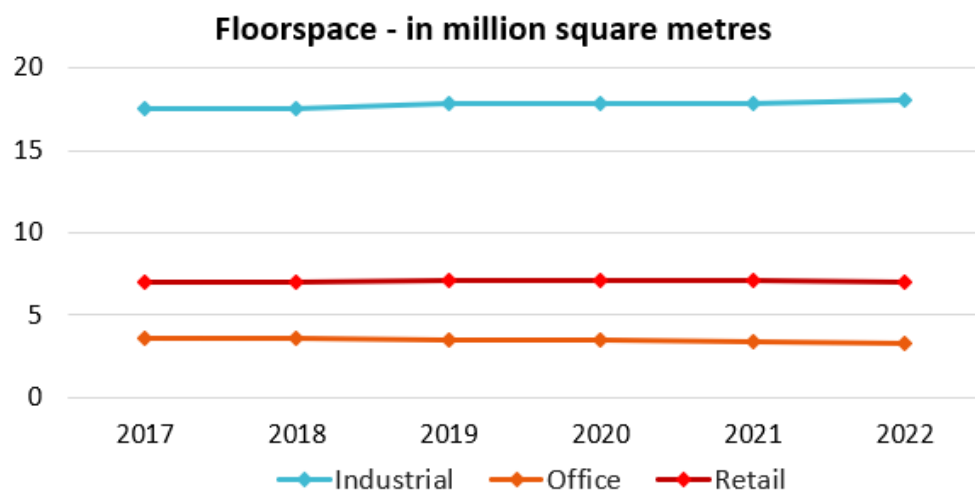


|                | 2020 |      | 2021 |      |      | 2022 |      |      |      |
|----------------|------|------|------|------|------|------|------|------|------|
|                | Q4   | Q1   | Q2   | Q3   | Q4   | Q1   | Q2   | Q3   | Q4   |
| <b>SELEP</b>   | 1.0% | 1.2% | 1.1% | 1.7% | 1.5% | 2.0% | 1.9% | 2.1% | 3.0% |
| <b>England</b> | 1.6% | 1.6% | 1.9% | 1.6% | 2.3% | 2.9% | 2.3% | 2.5% | 2.9% |

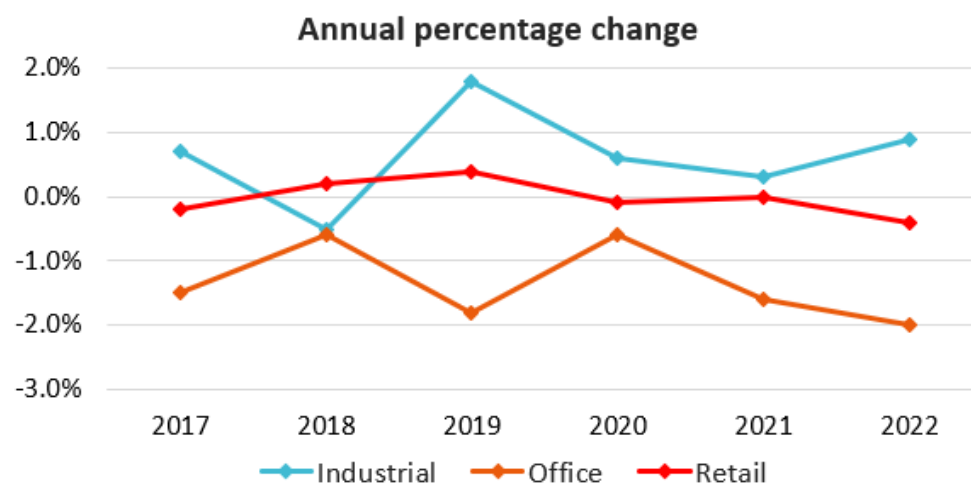
Source: DLUHC, Live Tables NB1

# 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 outperformed 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 |
|-------------------|------|------|------|------|------|------|
| <b>Industrial</b> | 17.5 | 17.5 | 17.8 | 17.9 | 17.9 | 18.1 |
| <b>Office</b>     | 3.6  | 3.6  | 3.5  | 3.5  | 3.4  | 3.3  |
| <b>Retail</b>     | 7.0  | 7.0  | 7.1  | 7.1  | 7.1  | 7.0  |



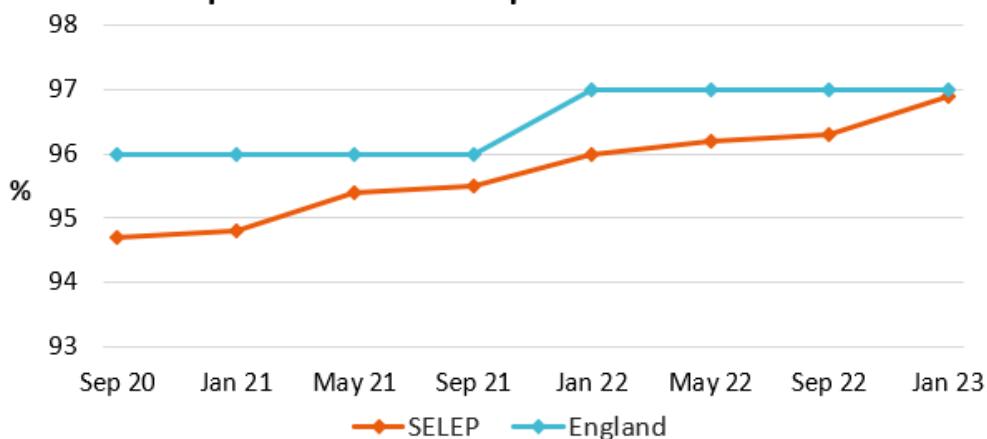
|                   | 2017  | 2018  | 2019  | 2020  | 2021  | 2022  |
|-------------------|-------|-------|-------|-------|-------|-------|
| <b>Industrial</b> | 0.7%  | -0.5% | 1.8%  | 0.6%  | 0.3%  | 0.9%  |
| <b>Office</b>     | -1.5% | -0.6% | -1.8% | -0.6% | -1.6% | -2.0% |
| <b>Retail</b>     |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

Source: VOA, Non-domestic stock of properties

# Broadband availability

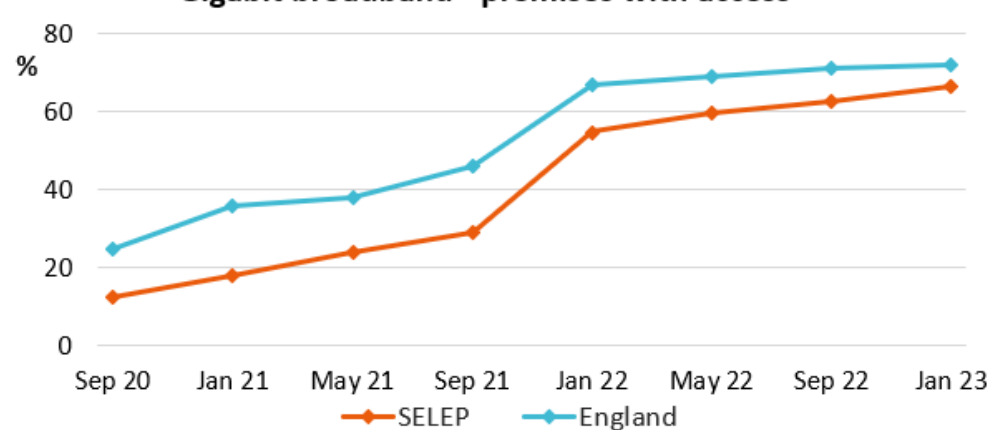
- 97% of all premises (domestic and non-domestic) have access to superfast broadband (30Mbit/s or better).
- The focus of government is now on roll-out of gigabit broadband (1000 Mbit/s or better) and although SELEP lags the national proportion, the latest figures in January 2023 suggest that the discrepancy is decreasing (only 5.4% lower in SELEP).
- Access to, or availability of the service may not result in take-up, with skills, knowledge and income being potential obstacles to take-up for some households.

Superfast broadband - premises with access



|         | Sep 20 | Jan 21 | May 21 | Sep 21 | Jan 22 | May 22 | Sep 22 | Jan 23 |
|---------|--------|--------|--------|--------|--------|--------|--------|--------|
| SELEP   | 94.7   | 94.8   | 95.4   | 95.5   | 96.0   | 96.2   | 96.3   | 96.9   |
| England | 96     | 96     | 96     | 96     | 97     | 97     | 97     | 97     |

Gigabit broadband - premises with access



|         | Sep 20 | Jan 21 | May 21 | Sep 21 | Jan 22 | May 22 | Sep 22 | Jan 23 |
|---------|--------|--------|--------|--------|--------|--------|--------|--------|
| SELEP   | 12.4   | 18.0   | 24.0   | 29.2   | 54.8   | 59.5   | 62.5   | 66.6   |
| England | 25     | 36     | 38     | 46     | 67     | 69     | 71     | 72     |

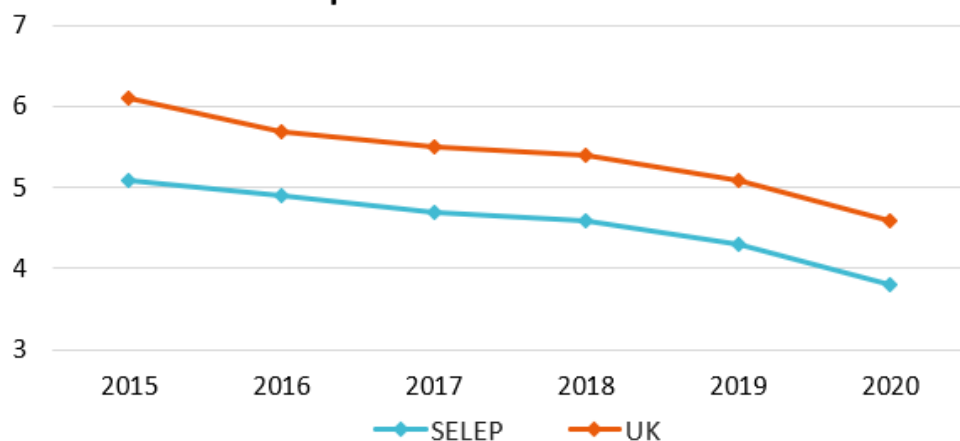
Source: OFCOM, Connected Nations



# Carbon Emissions

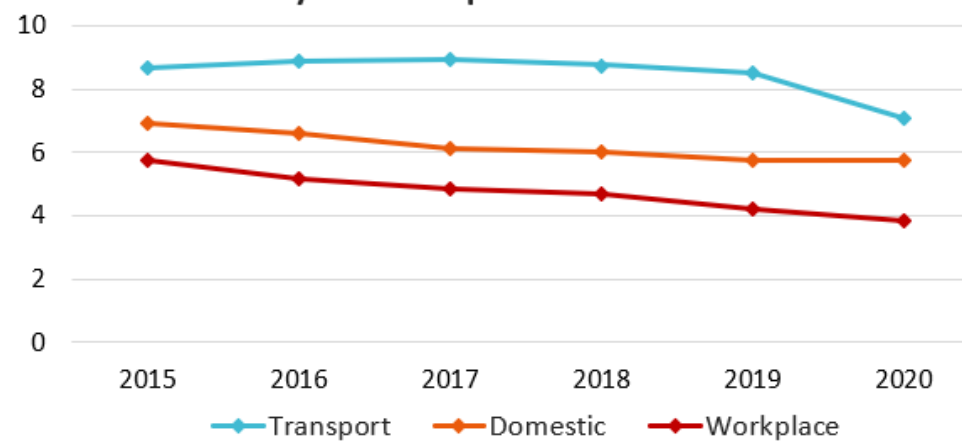
- Per capita carbon emissions have been reducing at a steady rate in recent years.
- Much of the reduction has been delivered through a switch to renewable electricity generation.
- The challenges for the future revolve mainly around transport and domestic emissions.
- The switch to electric vehicles 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 |
|--------------|------|------|------|------|------|------|
| <b>SELEP</b> | 5.1  | 4.9  | 4.7  | 4.6  | 4.3  | 3.8  |
| <b>UK</b>    | 6.1  | 5.7  | 5.5  | 5.4  | 5.1  | 4.6  |

SELEP by sector - equivalent million tonnes



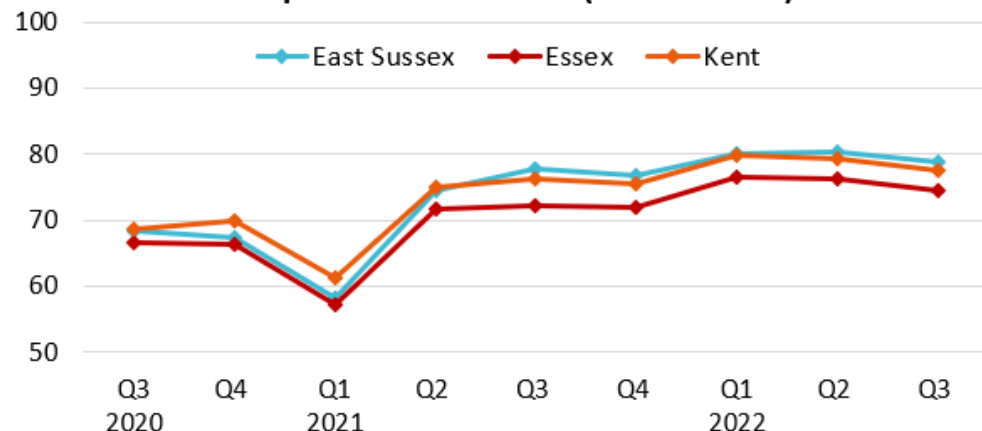
|                  | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|------------------|------|------|------|------|------|------|
| <b>Transport</b> | 8.7  | 8.9  | 9.0  | 8.8  | 8.5  | 7.1  |
| <b>Domestic</b>  | 7.0  | 6.6  | 6.2  | 6.0  | 5.8  | 5.8  |
| <b>Workplace</b> | 5.8  | 5.2  | 4.8  | 4.7  |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

Source: BEIS, local authority carbon emission estimates

# Workplace Footfall

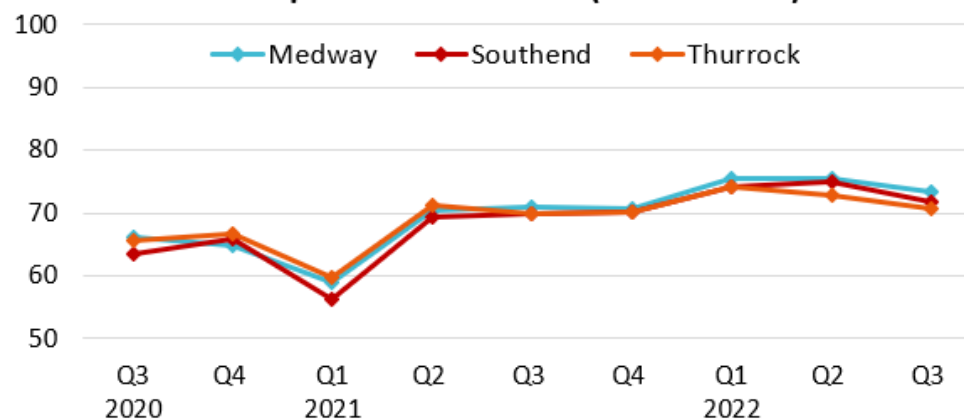
- During the pandemic Google created reports from Google Maps using aggregated, anonymised sets of data from users who have turned on the Location History setting, which is off by default. The data following Q3 2022 is no longer provided.
- The resulting datasets provide some insight into movements over 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 |
| <b>East Sussex</b> | 69   | 68 | 58   | 75 | 78 | 77 | 80   | 80 | 79 |
| <b>Essex</b>       | 67   | 66 | 57   | 72 | 72 | 72 | 77   | 76 | 74 |
| <b>Kent</b>        | 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 |
| <b>Medway</b>   | 66   | 65 | 59   | 70 | 71 | 71 | 76   | 75 | 73 |
| <b>Southend</b> | 64   | 66 | 56   | 69 | 70 | 70 | 74   | 75 | 72 |
| <b>Thurrock</b> | 66   | 67 | 60   | 71 | 70 | 70 | 74   | 73 | 71 |

Source: Google Community Mobility Reports

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