



State of the Region

An analytical report of the South East economy

produced by SELEP

July 2023



SOUTH EAST
LOCAL ENTERPRISE
PARTNERSHIP

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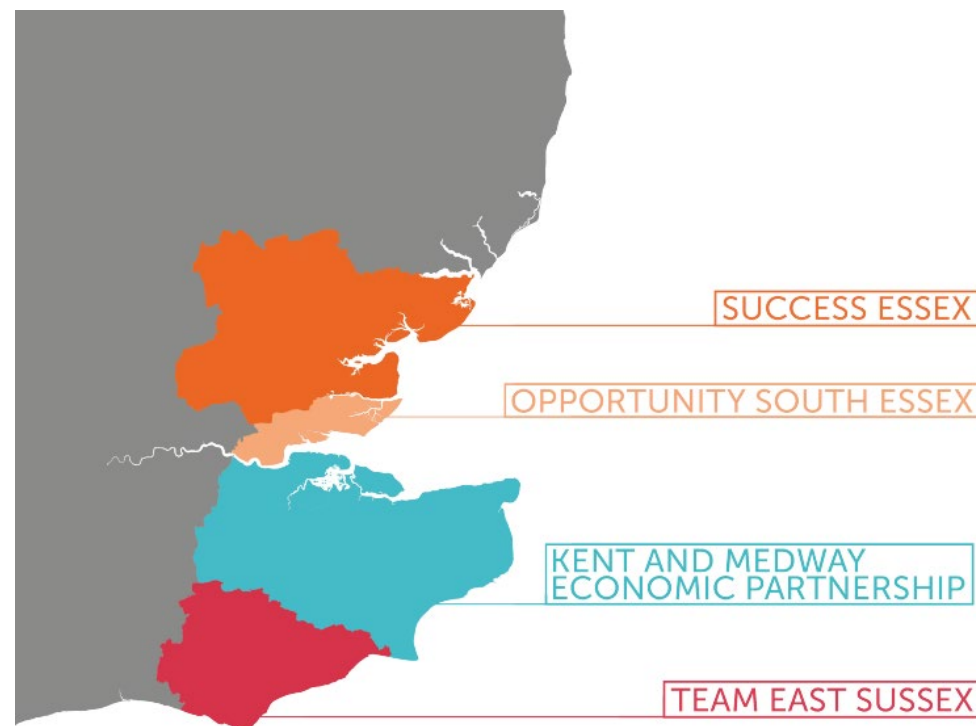
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This report has been produced by the **South East Local Enterprise Partnership (SELEP)** secretariat to inform the work of SELEP Ltd and our partners, supporting an ongoing evidence based approach to strategic economic growth. The local, national and global economy has faced significant challenges since our Local Industrial Strategy Evidence Base was produced in 2020 and this report provides a review of SELEP's current economic performance and how it has been impacted in recent years. The report complements quarterly data and intelligence packs that are available in our data and intelligence centre, drawing on a range of data sources and using the most recent data available in June 2023.

SELEP is one of the largest **Local Enterprise Partnerships (LEPs)** in the country, encompassing the local authority areas of **East Sussex, Kent, Medway, Southend, Thurrock and Essex**. Our **business-led Strategic Board** sets the strategic direction of the LEP, providing **clear strategic leadership** and **championing shared SELEP priorities**. It is the main SELEP interface with Government, **bringing together both private and public sectors to drive local growth and job creation** and to **oversee all SELEP activity** to deliver this aim.

SELEP operates a **federated model** of local LEP Boards by geographical area, which allows for **decision-making** and **project prioritisation** at a **local** level. The four federated boards are **Team East Sussex (TES)**; **Kent and Medway Economic Partnership (KMEP)**; **Opportunity South Essex (OSE)** and **Success Essex (SE)** and these are referred to throughout the report. Further detail on the federated area geographies can be found in **appendix 1 (Federated Areas)**.

In March 2021, the SELEP Board approved its **Economic Recovery and Renewal Strategy**. It responds to the devastating impact of the COVID-19 pandemic on the economy, as well as the implications of Brexit on supply chain issues and the labour market and the need to level up in the south east. Our strategy aims to build on the unique opportunities and challenges in our area and highlights four priorities which inform our activities: **Business Resilience and Growth**; **UK's Global Gateway**; **Communities for the Future**; and **Coastal Catalyst**.



Further details on SELEP's strategy and underpinning evidence base can be found on the SELEP website.

ECONOMIC OVERVIEW

BUSINESS

178,305

BUSINESSES AS
OF MARCH 2022



0.2%

GROWTH
FROM 2021



61.5%

THREE-YEAR SURVIVAL
RATE (ENGLAND: 57.5%)

22,090

NEW BUSINESSES
IN 2021



20,905

BUSINESSES
CLOSED IN 2021

321,700

SELF-EMPLOYED



13.0%

OF
POPULATION
AGED 16-64
(UK: 11.1%)

EMPLOYMENT

79.9%

POPULATION
AGED 16-64
ECONOMICALLY
ACTIVE
(UK: 78.7%)



3.0%

UNEMPLOYMENT
AS % OF
ECONOMICALLY
ACTIVE
POPULATION
(SEPT 2022)
(UK: 3.7%)

3.2%

CLAIMANT
RATE AS % OF
POPULATION
AGED 16-64
(DEC 2022)
(UK: 3.8%)



77

JOBS PER 100 RESIDENTS
AGED 16-64 (ENGLAND: 87)

43.7%

OF JOBS IN
KNOWLEDGE INTENSIVE
SECTORS (ENGLAND: 49.8%)



30.2%

OF JOBS IN
LOW PAY SECTORS
(ENGLAND: 26.7%)

ECONOMY



£101.6bn

GVA (2021)

5.0%

GVA SHARE OF UK



PLACE

4.268 million

usual resident population (2021)
6.4% share of UK's population

7% ten-year growth (compared to UK's 5.9%)

9 universities



13 Further Education colleges

8 ports 2 Freeports
Thames Freeport
and Freeport East

2 London airports
Southend
and Stansted

3 county
councils

3 unitary
authorities

15 district councils

11 borough
councils

3 city councils



365 miles of coastline
across the region

15 coastal districts

SKILLS



Apprenticeship starts:

Academic year 2021/22: 24,590

Academic year 2020/21: 22,480

Academic year 2019/20: 21,940

SELEP

England

Level 4 qualification
and above:

29.1%

Level 2 qualification
and above:

67.4%

No qualifications:

18.5%



Level 4 qualification
and above:

33.9%

Level 2 qualification
and above:

69.4%

No qualifications:

18.1%

PLACE



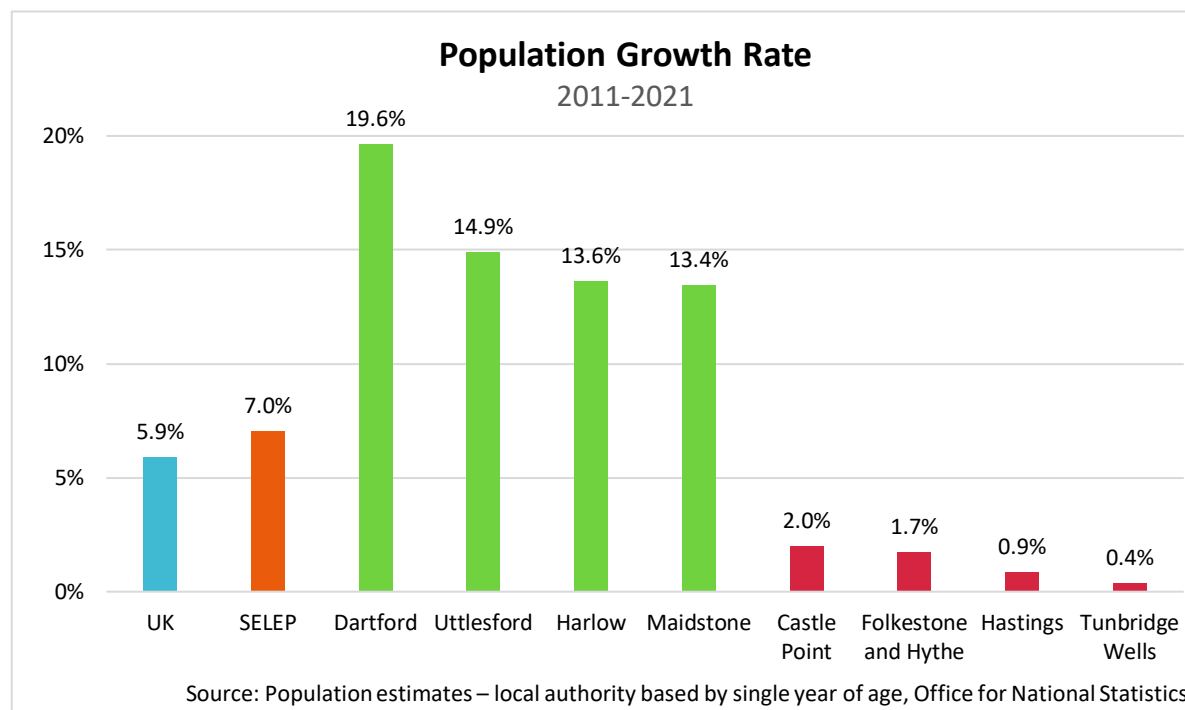
The usual resident population of SELEP was 4.268 million in 2021, which was 6.4% of the total UK population, making SELEP the largest LEP outside London in term of population size, and larger in population than Wales.

The **population of SELEP grew by 7%** in the 10 years to 2021, faster than the UK average of 5.9%. This rate of growth meant an **additional 280,400 people** are now living in the SELEP area compared to 2011.

Within Federated Areas, **SE grew the fastest at 9.1%**, while **TES at just 3.7%**. Population growth overall for the LEP and for individual Federated Areas was **lower than seen in the fastest growing LEPs**, with 5 English LEPs seeing growth of **10% or more**, including the South East Midlands and Oxfordshire.

However, within SELEP the **population growth was very uneven** across local authority areas, with **Dartford** seeing the highest growth at **19.6%**, which was the second highest growth of any local authority area in the UK, behind only Tower Hamlets. Other local authorities with high growth rates were **Uttlesford, Harlow, Maidstone, Ashford and Swale**, all being in the top 10% of fastest growing places in the UK. Conversely, **Eastbourne, Castle Point, Folkestone and Hythe, Hastings and Tunbridge Wells** saw very low population growth.

On an absolute basis, **Maidstone** saw the largest **increase** in population at **20,900**, with **Dartford, Colchester, Thurrock and Swale** all seeing population **increases** of **over 15,000 people**. At the **lower** end, **Hastings and Tunbridge Wells** had population increases of **less than 1,000 people** over the decade.



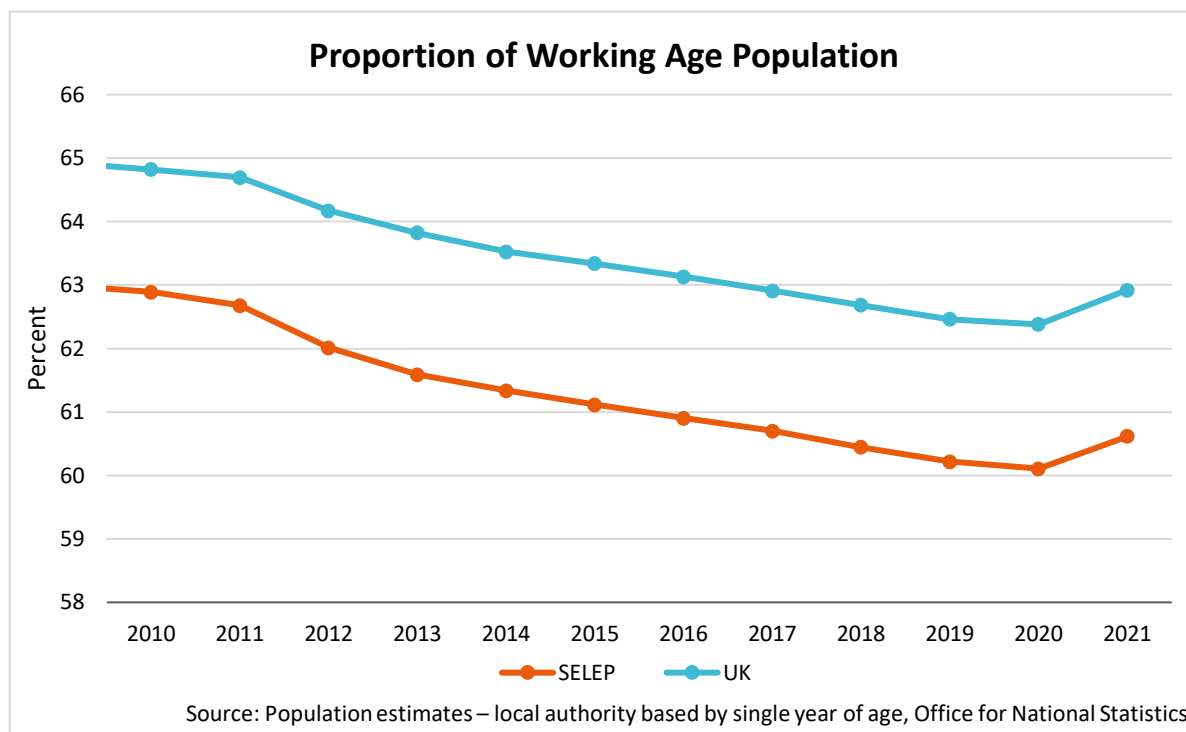


Working Age Population

Working age people make up a 60.6% share of the population in SELEP, which is lower than the UK average of 62.9%, and much lower than neighbouring London (68.8%). All but 5 local authorities in SELEP have a lower share of population being working age than the national average. Working age population reduced by a 1.8% share of total population across the UK in the 10 years to 2021, but for SELEP the reduction in share was higher at 2.1%. SELEP therefore has both a **lower share of population being working age** and **a sharper decline in this share** compared to the UK average.

Local authority areas in SELEP with the highest levels of working age population also have the highest proportion of population who are children and the lowest share of population aged 65 and over. Such areas can be characterised as being populated predominately by **working age families**, and this includes **Thurrock, Dartford, Harlow, Colchester and Medway**. Canterbury despite having a relatively high share of population of working age, uniquely has a very low proportion of population who are children, this being due to the large and relatively young university student population.

At the other end of the spectrum, we see local authority areas with a low share of population being of working age, also having a low share of population who are children, but with high proportions of population being aged over 65. These areas can perhaps be characterised as being **favoured by retirees** and are **generally in coastal areas**, and this includes **Rother, Tendring, Lewes, Wealden, Castle Point and Folkestone and Hythe**.



To illustrate the difference between areas, population figures for the extremes are shown below.

Share of population who are:	Aged under 16	Aged 16 to 64 (Working Age)	Aged 65+
Thurrock	22.5%	63.9%	13.6%
Rother	14.6%	52.9%	32.5%
Difference	7.9%	11.0%	18.9%

How the population will grow in the future is **uncertain**, with growth dependent on many factors including the **level of international migration** and the **level of house building** to accommodate new population growth. The Office of National Statistics produce population projections every two years, but the four forecasts from 2012 to 2018 all over-estimated the level of growth in SELEP between 2011 and 2021 by at least a fifth. The last projection from 2018 **suggests lower growth** of just **5.6%** for the next decade (2021 to 2031), but this still equates to another **240,800 of additional population to accommodate**. Given how unreliable these projections are as forecasts for the future, this should perhaps be seen as a lower limit with previous projections giving a growth of up to 364,000 being seen as an upper limit.

Migrant Population

The 2021 Census provides information for the country of birth for usual residents and this information is considered the main source for assessing long term migration patterns.

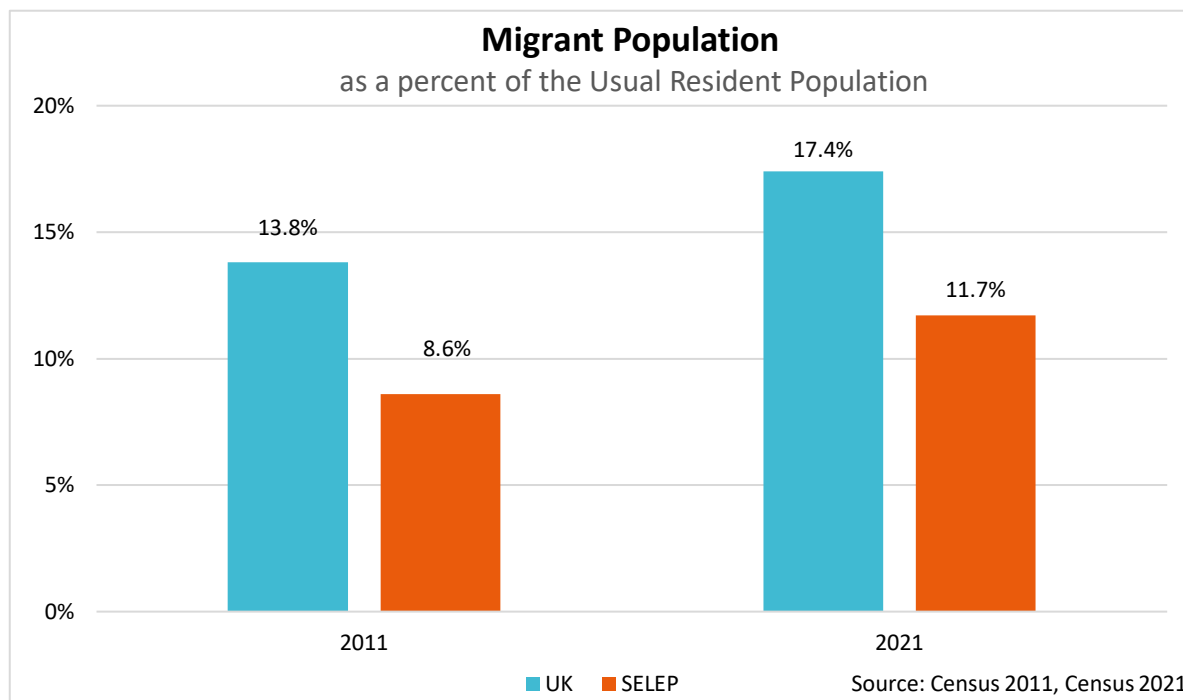
Across SELEP the Census records that **half a million people**, or **11.7%** of the usual resident population, **were born outside the UK**. This compares to **340,000 people** or **8.6%** of the population in **2011**. For **England as a whole** **17.4%** of the population in **2021** were born overseas, with this figure having **increased** from **13.8%** in 2011.

As might be expected, those born in current **EU countries** **account for the largest share** of SELEP residents born outside the UK at **42%**, with people born in **Asia being the next largest group**, although SELEP has **significantly less** Asian born people as a share of population than the UK as a whole.

At a local authority level **Rochford, Maldon, Castle Point** and **Tending** have the lowest share of population who were born outside the UK - at **5% or less**.

Thurrock, Dartford and **Gravesham** have the highest share at **19% or more**.

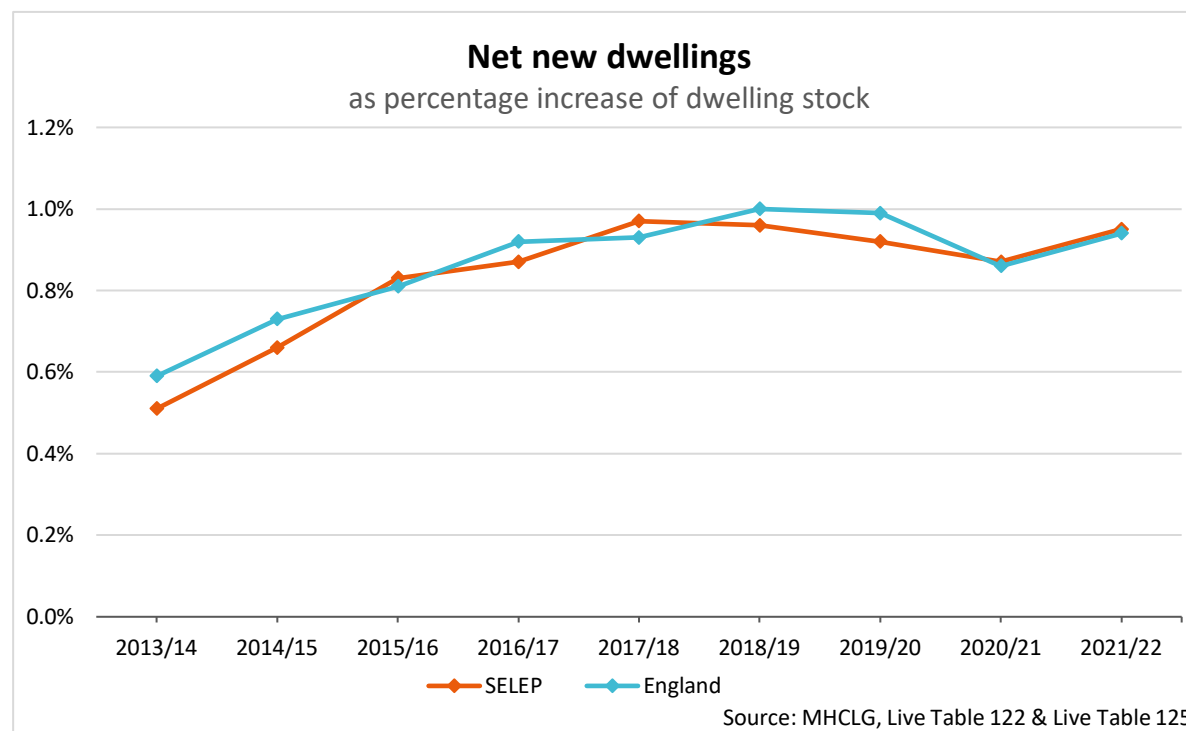
Gravesham, Dartford and **Ashford** have the largest shares of population who were born in Asia at **5% or more** of the population, while **Thurrock, Harlow, Gravesham** and **Eastbourne** have the highest shares of EU born residents at **7.5% or more** of the population. **Dartford** and **Thurrock** also both have high numbers of African born residents at **over 5%** of the population.





In March 2022, the housing stock for SELEP was 1.89 million dwellings. Dwelling stock increased by 8.4% in the most recent ten-year period, slightly below the England average growth of 8.6%. This growth represented 146,200 net new dwellings for SELEP. In the last three years the increase in housing stock has been 2.8%, the same as for England, representing 50,900 net new dwellings. In 2022/23, SELEP remained as the most productive LEP for housing delivery outside of London, with 4,170 more new dwellings completions than South East Midlands, the next largest provider.

The rate of increase in dwelling stock has been 0.91% on average over the last five years, compared to below 0.6% growth a year a decade ago. The last time a 1% annual growth rate was achieved was in 2008, before the financial crash. However, in absolute terms the average increase has been 17,200 net new dwellings a year over the last five years, compared to 15,700 a year in the five years before the financial crash. So, a record number of new dwellings are now being delivered, although there is a lower rate of increase in the stock, due to the stock of dwellings now being much higher.





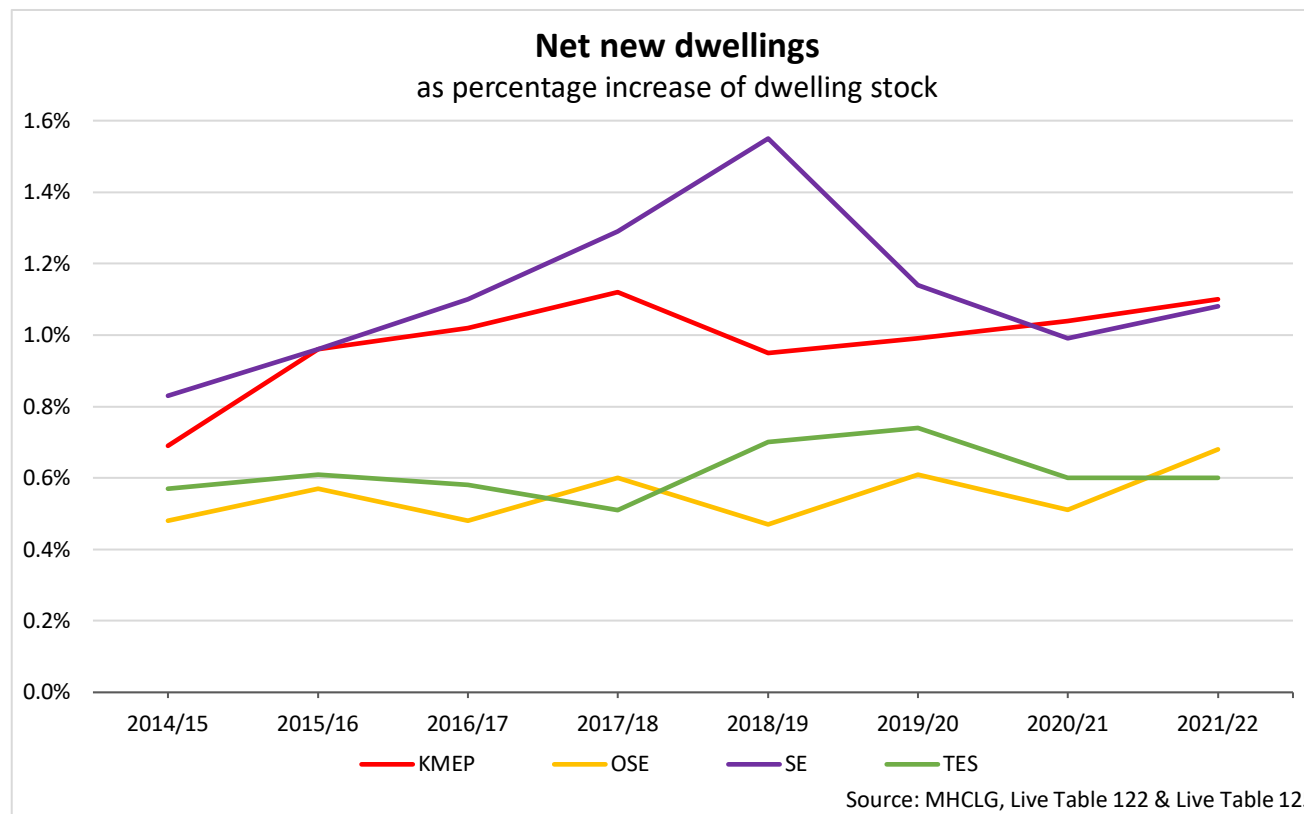
Across Federated Areas, **KMEP** and **SE** delivered a **higher** rate of housing stock growth than the national average, with **OSE** and **TES** delivering **below** the national rate of increase.

At a local authority level, **Dartford** has seen the **largest** rate of increase in dwelling stock over 10 years at **17.9%**, with **Uttlesford** a close **second** at **17.0%**. In absolute terms **Maidstone** has also seen the **most** new housing at **10,100**, with **Colchester** and **Chelmsford** also seeing **high** numbers.

In the last three years, **Maidstone** has seen both the **largest** rate of increase in stock and the **highest** number of new houses at **6%** and **4,400** respectively. **High** numbers are also being delivered in **Medway**, **Braintree**, **Colchester** and **Chelmsford**.

Local authorities with **persistently low** housing growth, both as a percentage **increase** in stock and as absolute numbers, over both shorter and longer time frames are **Rother**, **Eastbourne**, **Hastings** and **Castle Point**.

The **percentage of dwellings which are second homes** is **0.9%** across SELEP, with some coastal local authorities seeing rates above **2%** (**Thanet**, **Rother**, **Swale**, **Dover**, **Folkestone** and **Hythe** and **Tendring**). The rate of second homes is extremely low in **Gravesham**, **Basildon**, **Medway**, **Maidstone**, **Rochford** and **Harlow**.

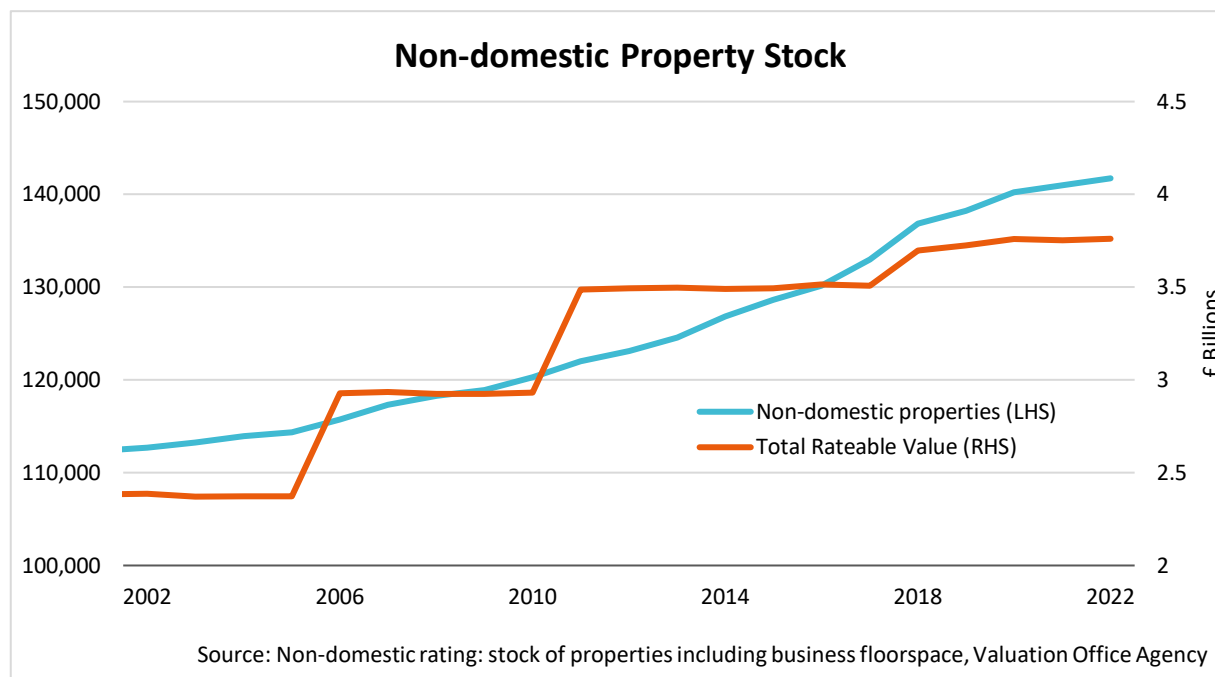




Non-domestic property stock

There were **141,730 non-domestic properties** across SELEP in March 2022 with a **total rateable value of £3.76 billion**. There was an **increase of 8,740 or 6.6% growth**, in the number of non-domestic properties in the previous five years. **Total rateable value has increased 7.2%** over the same period, although most of this occurred in **2018**, when the last rates revaluation came into effect.

The Valuation Office Agency classifies non-domestic properties as either **Retail, Office, Industrial** or **Other**. Most properties are assessed for non-domestic rates by square meterage (sqm) and figures for this are published. However, much of the Other category is often not assessed for rates by square meterage and so figures are not available, with major exclusions from the published data including holiday homes, beach huts, hotels, car parks, and public houses.

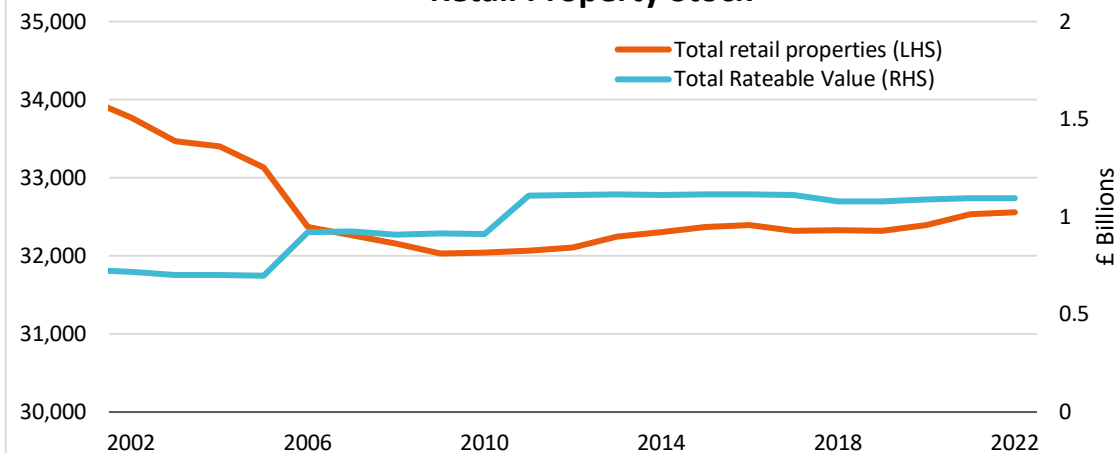




The number of retail properties was **32,560**, with a total rateable value of **£1.1 billion** and area of **7.05 million square metres**. The number of retail properties has **increased** by **just 0.7%** over five years and **0.2%** on a square meterage basis, with only **Chelmsford** seeing noticeable growth in both the number of properties and the size of the retail area.

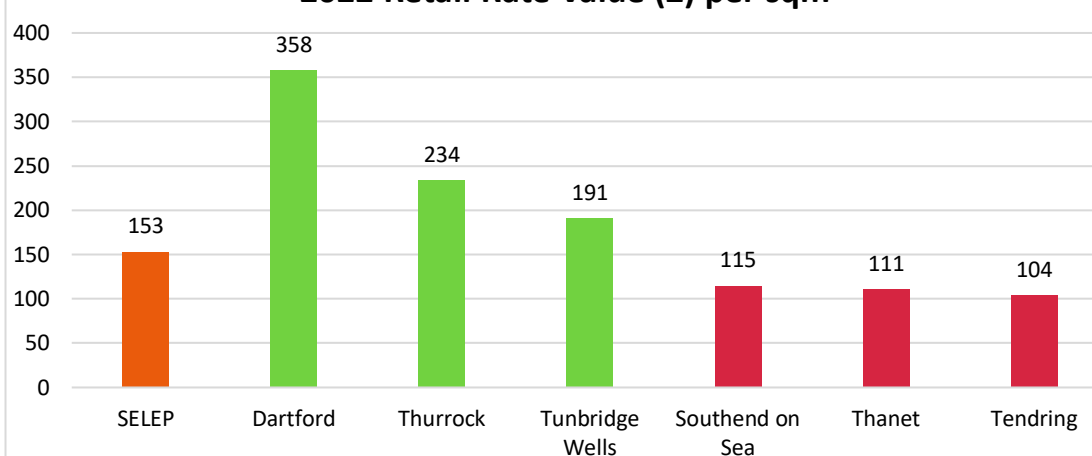
The average retail rateable value is **£155 per sqm** across SELEP compared to the England average of **£161**. Values are **slightly higher** across **KMEP** and **OSE**, but **much lower** in **TES** at **£132**. The averages are driven up by very high rates in some places – **Dartford** at **£358** and **Thurrock** at **£234**. The rate in **Dartford** is similar to rates otherwise only found in central London, with **Thurrock** having the highest retail rates in East England. **Most coastal areas see lower rates** with **Tendring** having the lowest average rate of **£104**, with **Thanet**, **Southend-on-Sea**, **Rother**, **Folkestone** and **Hythe**, **Dover** and **Hastings** all below **£120**, but with **Eastbourne** closer to the SELEP average at **£147**.

Retail Property Stock



Source: Non-domestic rating: stock of properties including business floorspace, Valuation Office Agency

2022 Retail Rate Value (£) per sqm



Source: Non-domestic rating: stock of properties including business floorspace, Valuation Office Agency

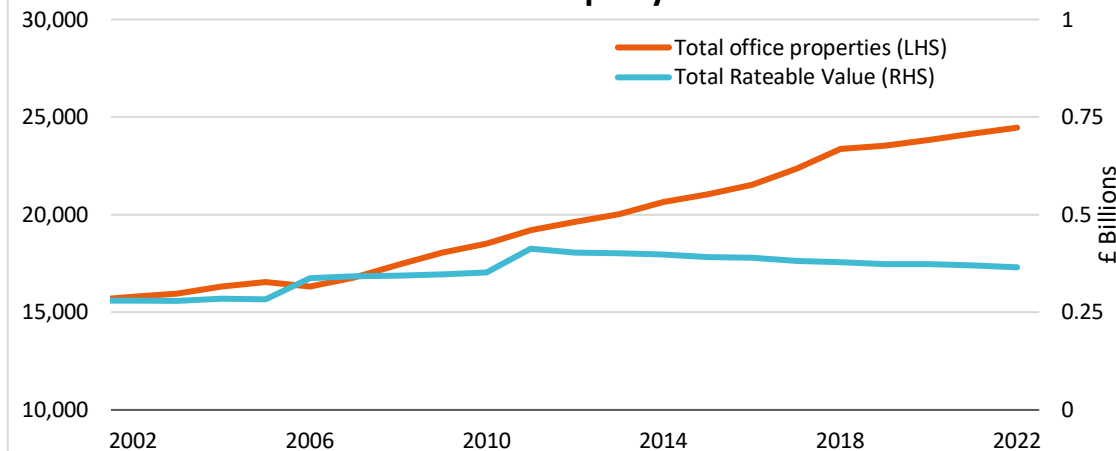


SOUTH EAST LOCAL ENTERPRISE PARTNERSHIP

The number of office properties was **24,460**, with a total rateable value of **£364.5 million** and an area of **3.36 million square metres**. The number of office properties has **increased** by **9.3%** over five years, but on an area basis has **reduced** by **6.3%**, showing a tendency towards smaller properties. The largest losses in area have been in **Brentwood, Southend and Maidstone**. Only a few local authority areas have seen some increase in office space area, with modest increases in **Basildon, Ashford and Uttlesford**.

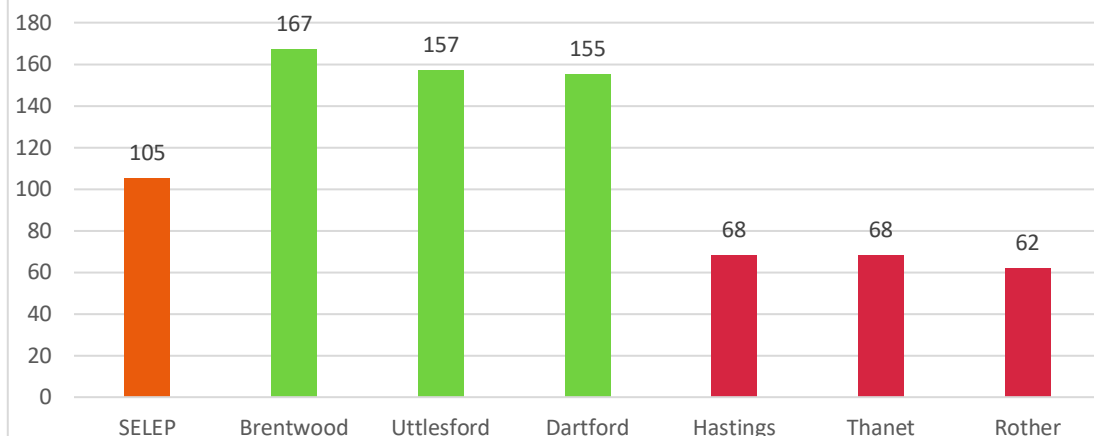
The average office rateable value is **£109 per sqm** compared to **£180 across England**, being **slightly higher** across **SE** and much lower at **£81 in TES**. The England average is dominated by the very high rates in central London of £394. Across SELEP there is **significant variation in averages across local authority areas**, with the highest being **Brentwood** at £167 and the lowest being in **Rother** at £62. The rates in **Brentwood** are the twelfth highest at a local authority level outside of London, with **Uttlesford, Dartford, Sevenoaks and Chelmsford** also very high in national rankings outside London and above £145 per sqm. **Rates are much lower in most coastal areas** with **Hastings, Thanet and Rother** all below £70 per sqm.

Office Property Stock



Source: Non-domestic rating: stock of properties including business floorspace, Valuation Office Agency

2022 Office Rate Value (£) per sqm



Source: Non-domestic rating: stock of properties including business floorspace, Valuation Office Agency

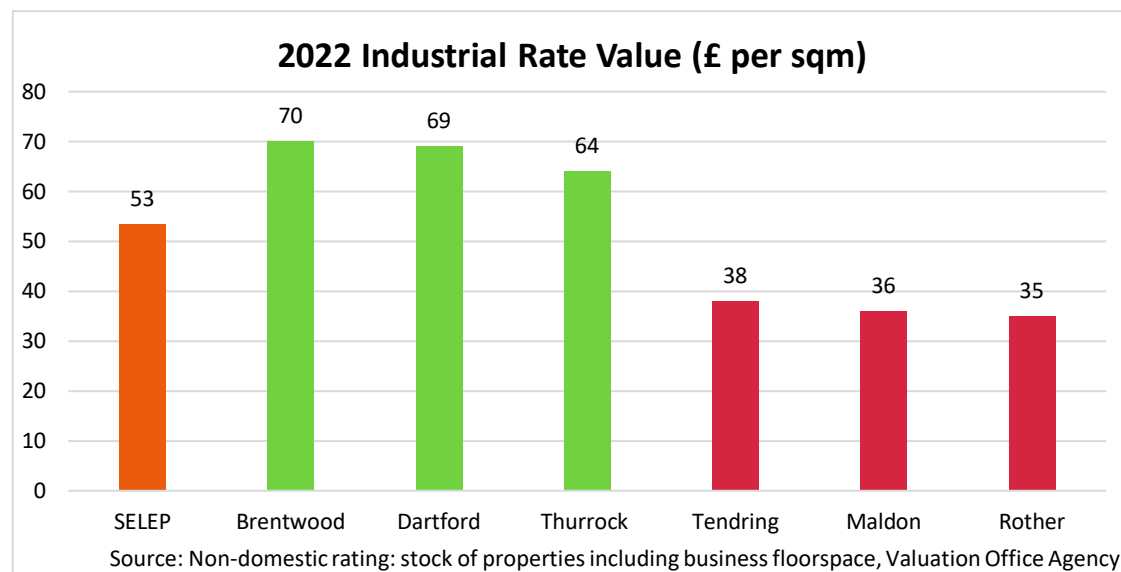
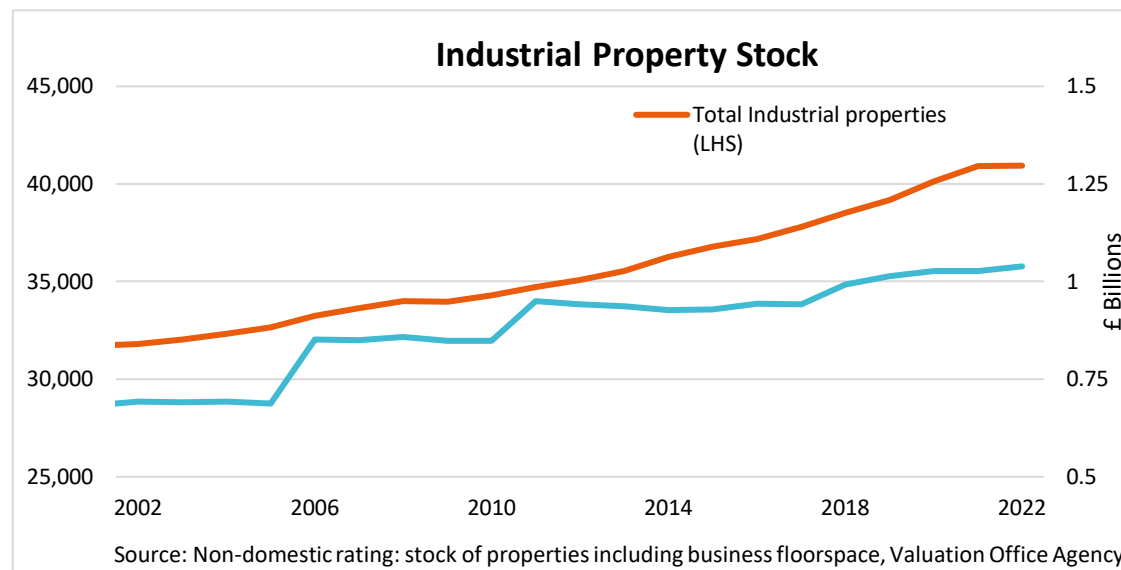


SOUTH EAST LOCAL ENTERPRISE PARTNERSHIP

In March 2022 there were **40,940** industrial properties across SELEP, with a **total rateable value of £1.0 billion**. Some industrial properties are not valued by area, with port and dock areas being the main exclusion, and for those properties valued on an area basis, the area was **18.2 million sqm**. In the previous five years the number of properties **increased** by **8.3%** with the **increase** being **3.2%** on an area basis. **Thurrock** saw by far the largest increase in industrial area, with **Swale**, **Uttlesford**, **Rochford** and **Tunbridge Wells** also seeing high growth. There were significant losses in **Basildon**, with **Harlow**, **Tonbridge** and **Malling**, **Southend-on-Sea** and **Colchester** also seeing declines in industrial area.

The average rateable value per square metre for industrial property is **£53** across SELEP, but higher in **OSE** and much lower in **TES**. Overall, this is **much higher** than the national average of **£41**. **Brentwood**, with rates at **£70** per sqm, has the fourteenth highest rates at a local authority level outside London. Not far behind are **Dartford**, **Thurrock**, **Uttlesford** and **Sevenoaks**, which all have average rates above **£60** per sqm, while coastal areas such as **Rother**, **Maldon**, **Tendring**, **Thanet** and **Hastings** see average rates at **£40** or below.

There are some **43,870** non-domestic properties classed as Other, with a **total rateable value of £1.26 billion**. As mentioned above, many of these properties are not assessed for rates using area, so figures for square meterage are not available. The Other category is a mix of commercial properties such as restaurants and public houses, all forms of public sector buildings, as well as a range of indoor and outdoor leisure activities.





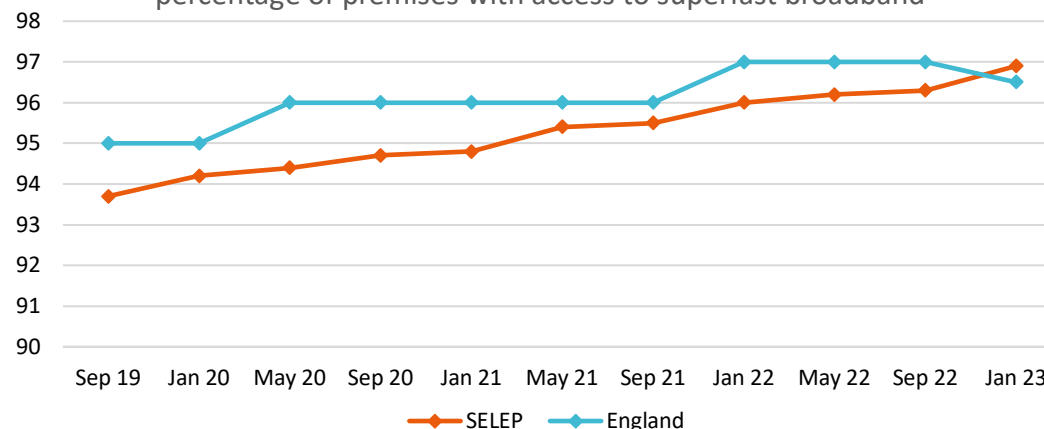
By January 2023 Superfast Broadband (30 Mbit/s) was available to **96.9% of properties** (domestic and residential) across SELEP, close to the national average of **96.5%**. Availability **continues to increase, albeit at a slow rate**, having improved from **96%** a year before. Properties without access to this level of broadband are all in more remote rural areas.

The focus is now on the roll out of **Gigabit broadband (1,000 Mbit/s)** with **62.5% availability** to properties across SELEP, compared to **71%** for England. **Progress in the roll-out of these higher speeds has been rapid**, with only **12.4%** of premises having available service two years previously.

Broadband access

Superfast broadband availability

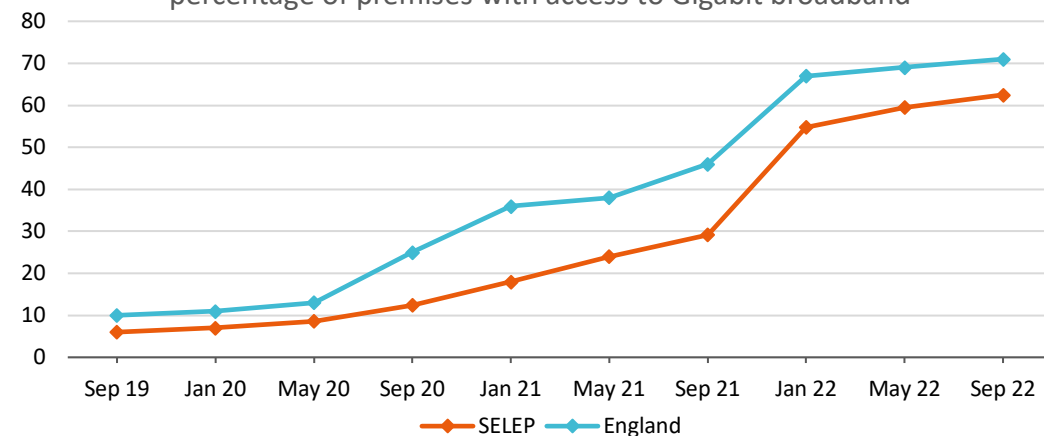
percentage of premises with access to superfast broadband



Source: OFCOM, Connected Nations Report

Gigabit broadband availability

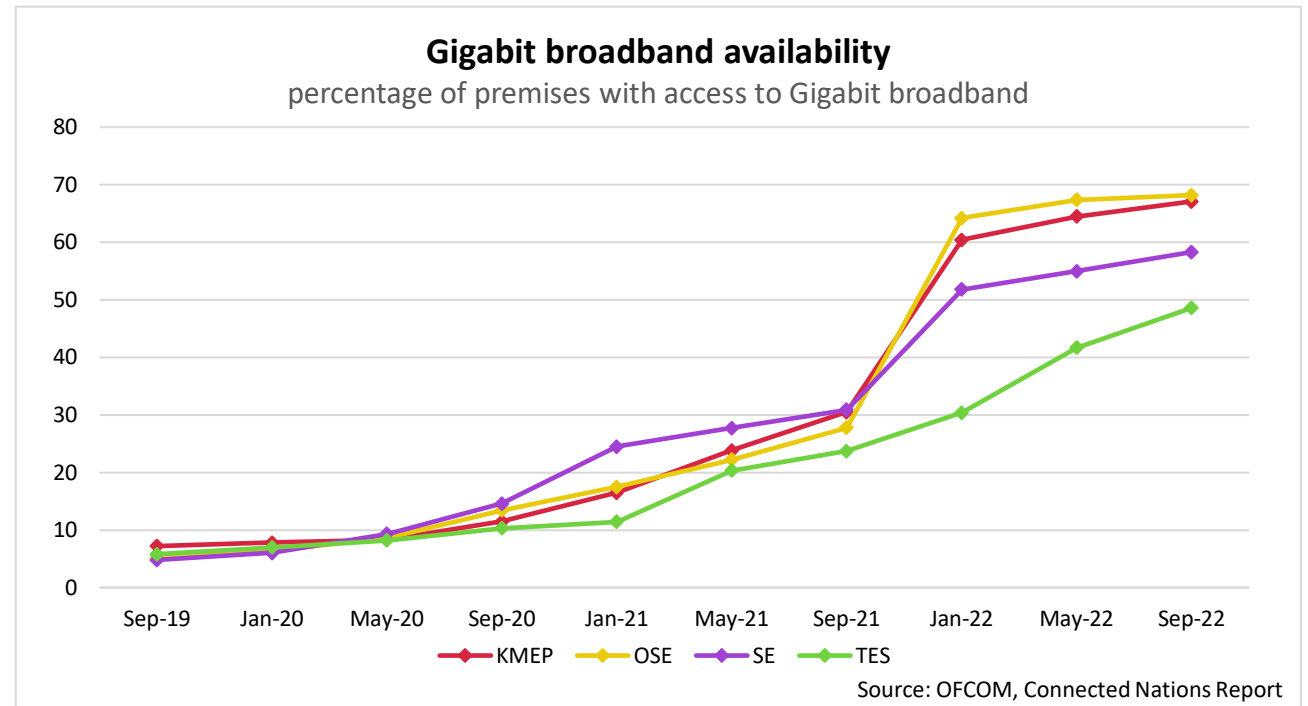
percentage of premises with access to Gigabit broadband



Source: OFCOM, Connected Nations Report



In the September 2022 figures, **KMEP** and **OSE** have the **highest availability** of Gigabit broadband with **TES** some way behind at just 48.6%. There is **much larger variation at a local authority level** with **Harlow, Epping Forest, Thurrock, Medway and Southend-on-Sea** all having availability to **80% or more** premises, whereas **Rother, Braintree, Wealden, Canterbury, Rochford, Castle Point and Hastings** all have availability **below 50%**. Uniquely **Tendring** has yet to see any significant benefit, with availability to just 14.8% of premises.

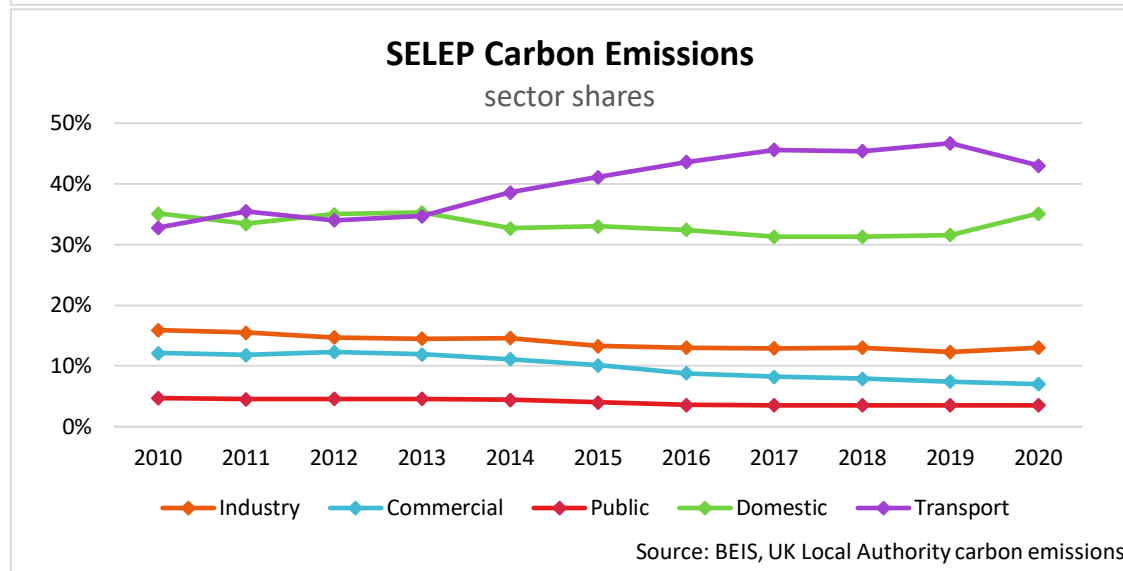
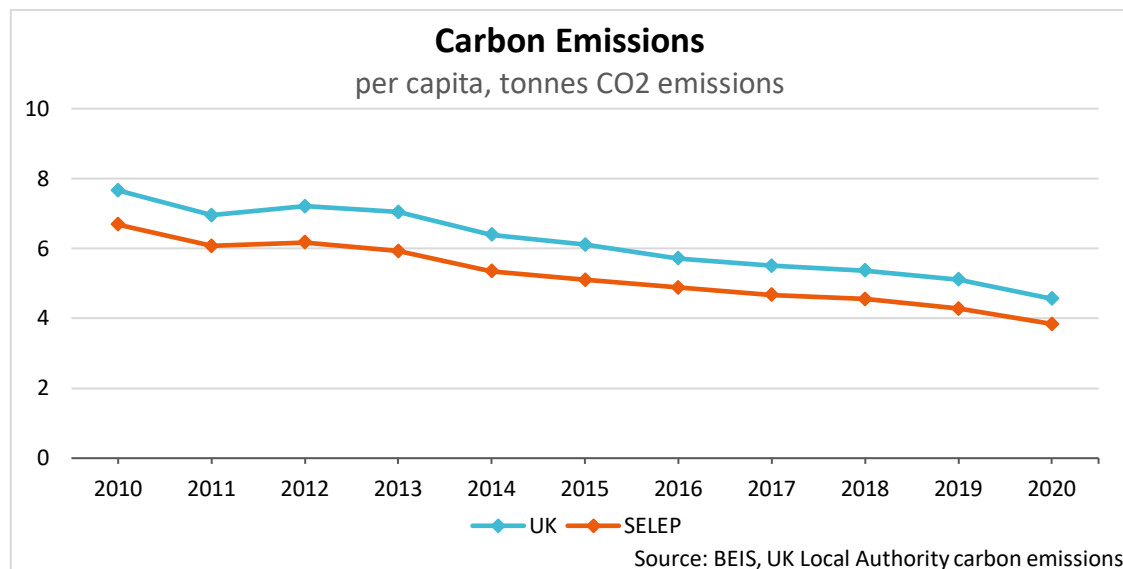




Carbon Emissions

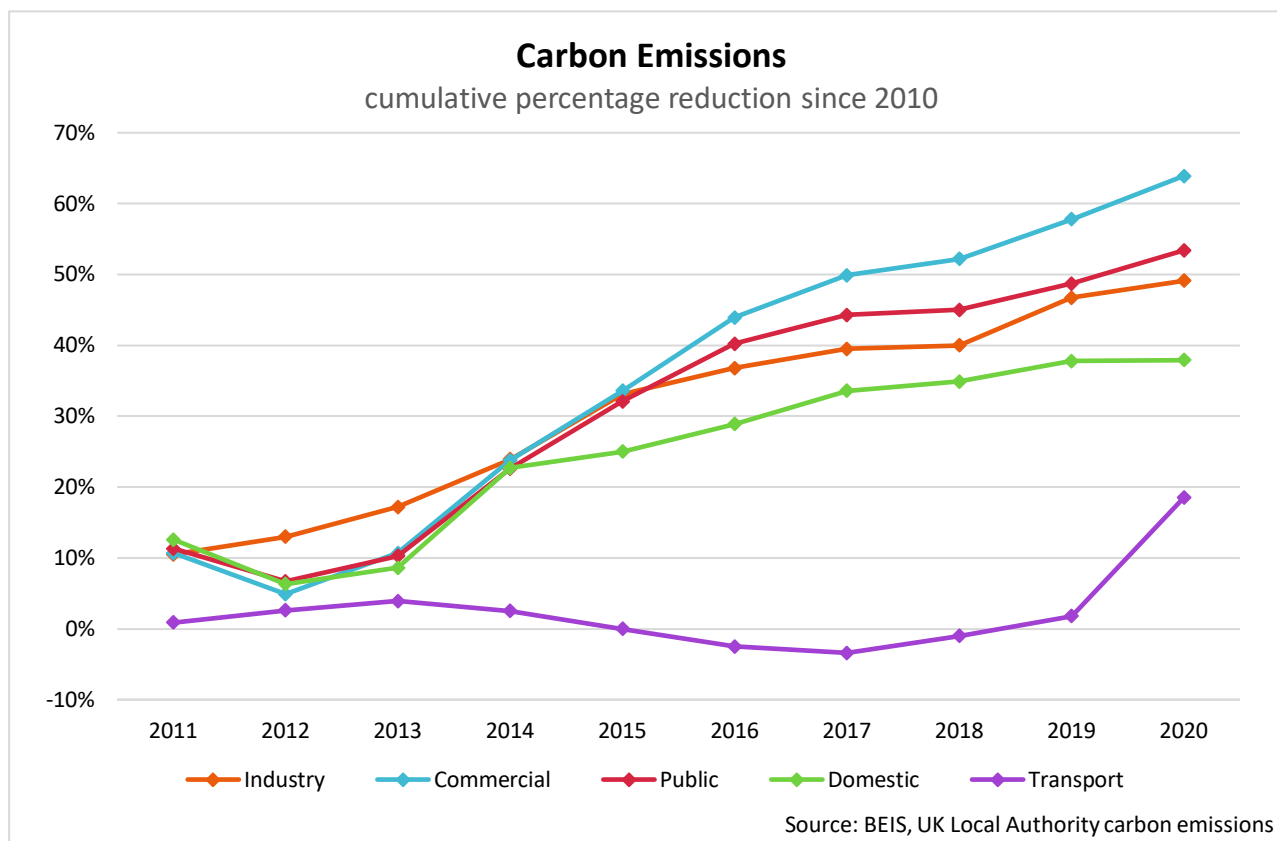
The latest data for carbon emissions at the local authority level shows that in 2020 the SELEP area produced **3.8 tonnes carbon dioxide equivalent emissions per capita**, which is **less** than the **UK average of 4.6**. Emissions are **higher** across **Success Essex**, due to the inclusion of particular emitting activities such as Stansted Airport operations, and lowest in **East Sussex**.

The main contributors to emissions are **transport** at a **43%** share and **domestic properties** at **35.1%**. However, as COVID impacted activity in 2020, the 2019 shares of **46.7%** for transport and **31.6%** for domestic energy use are probably more reflective on the current normal shares.



There have been reductions in emissions since 2010 with the industrial sector cutting total emissions by 49%, the commercial sector by 63.9% and the public sector by 53.4%. Much of this has been delivered through more electricity being generated from green renewable power sources. Domestic sector emissions have also reduced considerably by 38% but remain as a high contributor of total emissions with some 5.8 million CO2 equivalent tonnes a year across SELEP due to high reliance on gas for heating. Emissions for transport usage has seen almost no reduction in 10 years and in 2019 (pre-COVID) remained at 8.5 million CO2 equivalent tonnes (falling to 7.2 million in 2020 due to reduced transport use during COVID).

At a local authority level, there is significant variation, which reflects the different forms of economic activity in the location. Swale has the highest emissions at 6.9 tonnes per capita, with Uttlesford and Epping Forest not far behind. Brentwood, Sevenoaks and Tonbridge and Malling all have emissions of over 5 tonnes per capita. Most local authorities sit within the range of 3 to 4 tonnes per capita, with emissions below 3 tonnes in Southend-on-Sea, Medway, Eastbourne and Hastings.





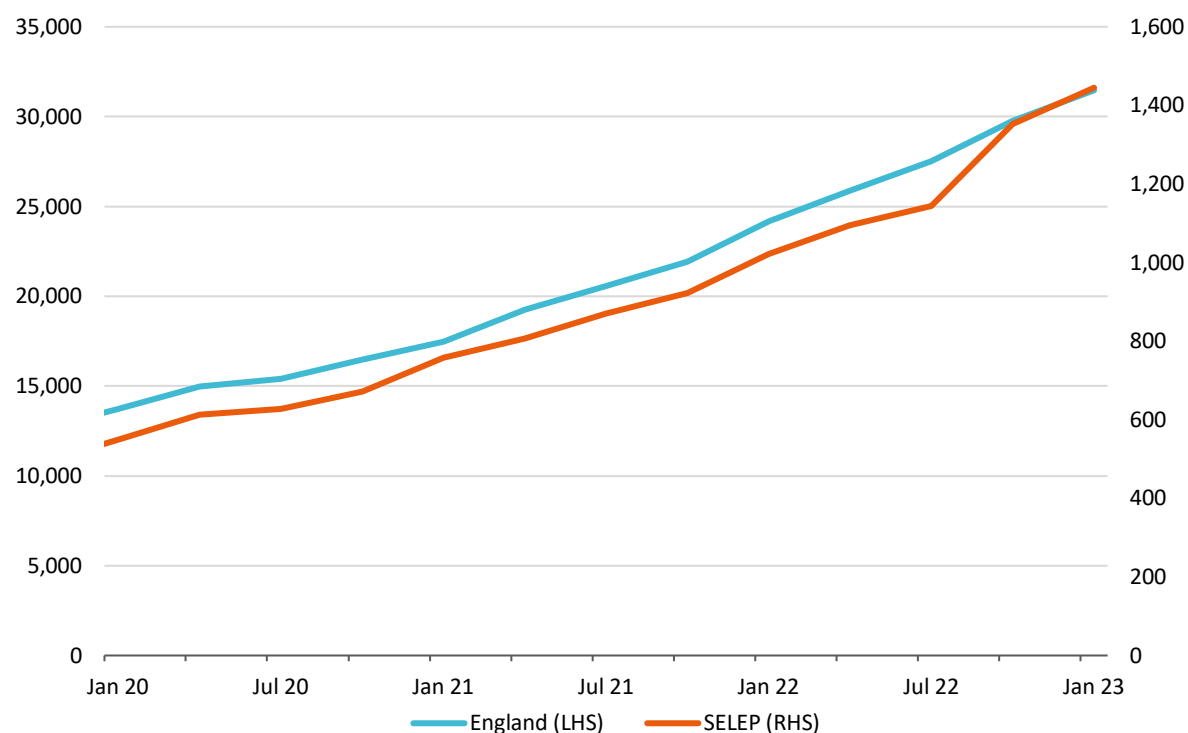
Electric Vehicle charging

The move to electric vehicles provides the **opportunity to remove significant carbon emissions**, assuming the additional electricity generation required comes from **green renewable resources**. As of January 2023, there were **1,445 publicly available vehicle charging points** across SELEP, **up from 549** three years before and with a **41% increase** during 2022, ahead of the **national increase of 30%**.

KMEP have **significantly more** charging points per 100,000 head of population at **41.8**, with other Federated Areas of the LEP being below **30** per 100,000 head of population. County level data shows that **Essex** and **East Sussex** currently have the **lowest** levels of vehicle charging points compared to other shire counties. The England average is **56** charging points per 100,000 population, although a high rate of 131 in London pushes this number up, with many England regions having **less than 40**.

At a local authority level, **Folkestone and Hythe** has achieved **117 per 100,000**, with **Medway, Dartford, Braintree** and **Dover** all above **80**. At the other end, at **below 20** units, we find **Maldon, Harlow, Brentwood** and **Castle Point**, with Castle Point having the lowest availability of any local authority in the country.

Public Electric Vehicle Charging Points



Source: Electric vehicle charging device statistics, Department for Transport

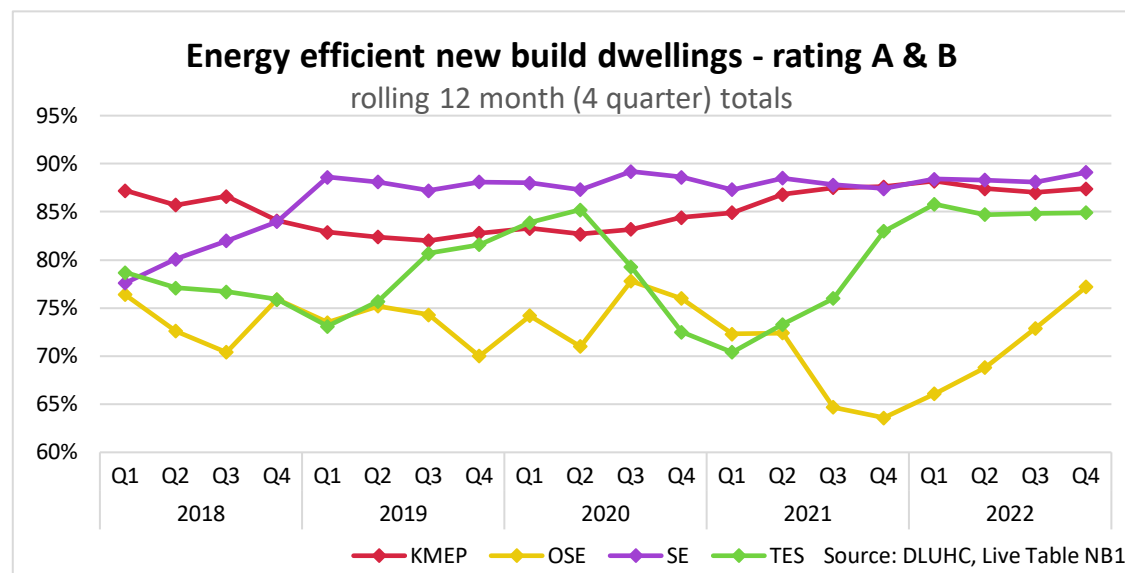
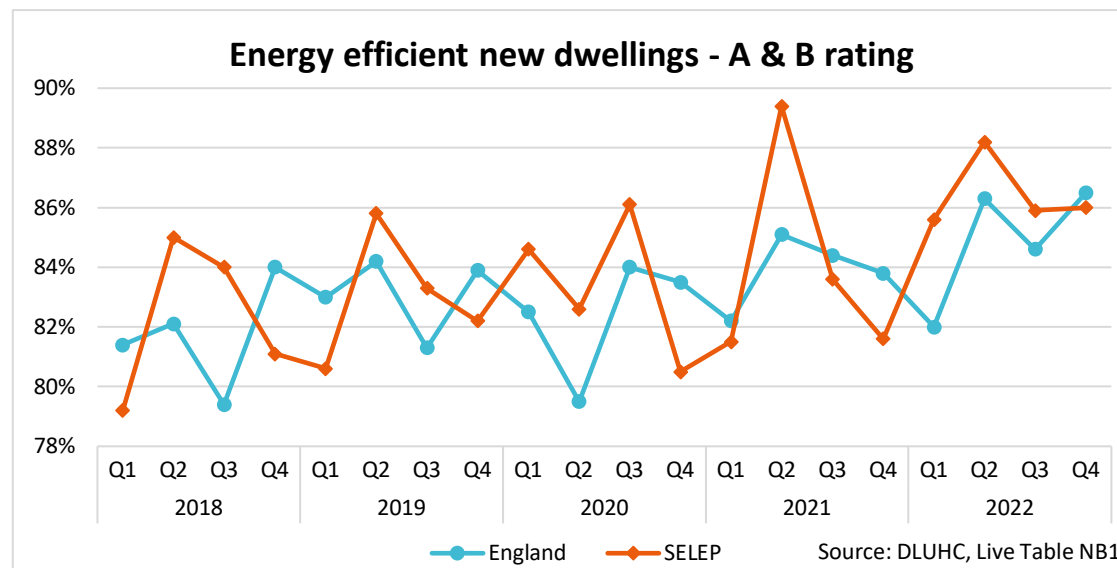


Across SELEP during 2022 **86.4%** of new dwellings built had an **energy efficiency rating of A or B**. This was **up** on 2021, when **84%** was achieved and **higher** than the **England** average of **84.9%**. There has been **steady improvement** over time from 82.3% achieved in 2018.

Across Federated Areas, there is consistent **higher** deliver of energy efficiency within **KMEP** and **SE**, both above **87%** for 2022. Energy efficiency for new dwellings is **much lower** in **OSE** at **77.2%** for 2022, although this was a **big improvement** on the **63.6%** achieved in 2021. Delivery was relatively **high** for **TES** at **84.9%** for 2022 and **much improved** since 2020, when just **70.4%** was achieved.

At a local authority level, the highest rates of energy efficiency for new dwellings for 2022 was achieved in **Tendring, Dartford** and **Dover** - all above 95%. Local authorities with the largest housing delivery, Chelmsford and Maidstone achieved around 87% each, but Medway only 79.4%. Areas with low delivery for energy efficiency at below 65% were **Brentwood, Eastbourne, Hastings** and **Sevenoaks**, although these same local authorities also have very low delivery of new housing.

New dwelling energy efficiency



ECONOMY

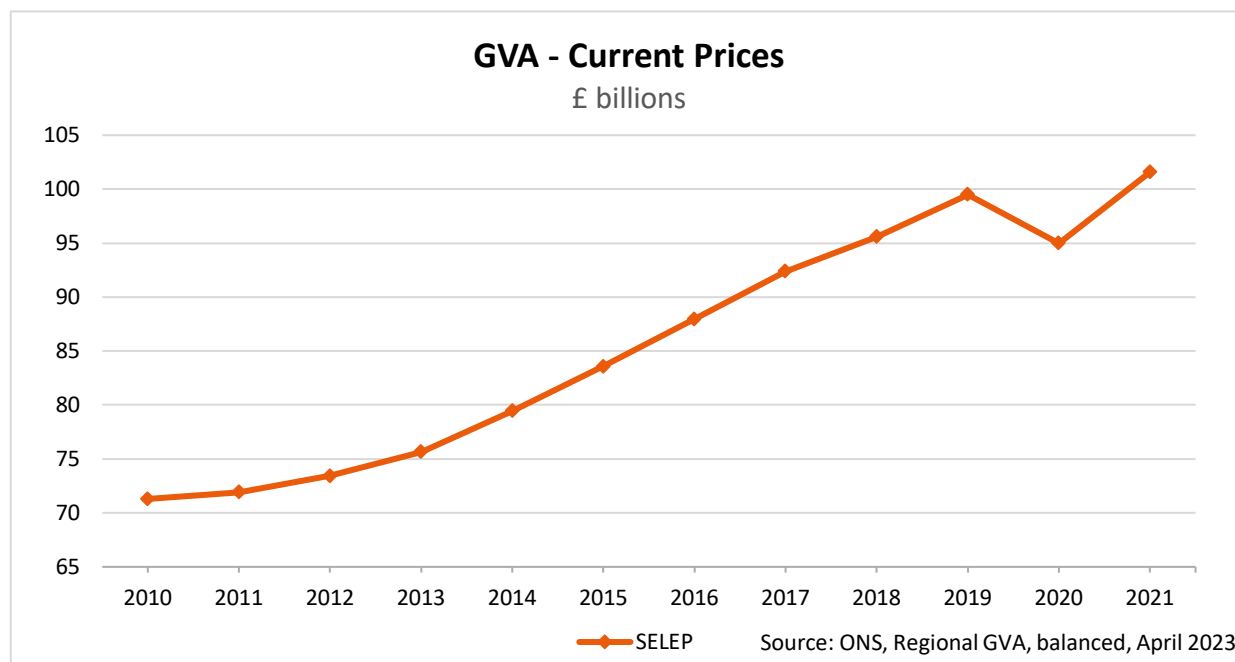


Economic output

Economic output for the **overall economy** is measured by **Gross Domestic Product (GDP)** and for **individual sectors** by **Gross Valued Added (GVA)**. The difference is that Gross Valued Added figures **do not include sales taxes and subsidies provided**. Regional and sub-national economic output is usually examined through GVA statistics, but these come with some time delay, and the latest available is for 2021.

In 2021, SELEP GVA was estimated to be **£101.6 billion** at current prices for the year which was a **5% share** of the UK total. The value of SELEP GVA reflects its **large geographic area**, with GVA for the next largest LEP, Greater Manchester being **£78.7 billion** in 2021. Many LEP areas are **considerably smaller** with **more than half of LEP areas generating less than £30 billion**.

The 2021 figure compares to **£99.5 billion** in 2019 at 2019 prices. The 2021 GVA figures at 2019 prices would be **£96.3 billion**, representing a **£3.2 billion loss** or **3.2% real term reduction**. This is a **smaller reduction** than seen for the UK, where **real GVA fell by 3.6%**. While the economic shock of COVID to SELEP as measured by GVA was **low on a relative scale**, some LEP areas fared worse, notably **Solent, Buckinghamshire** and **Liverpool City Region**. More resilient LEP areas with much lower decline in GVA included The **Marches, Thames Valley Berkshire** and **D2N2**.



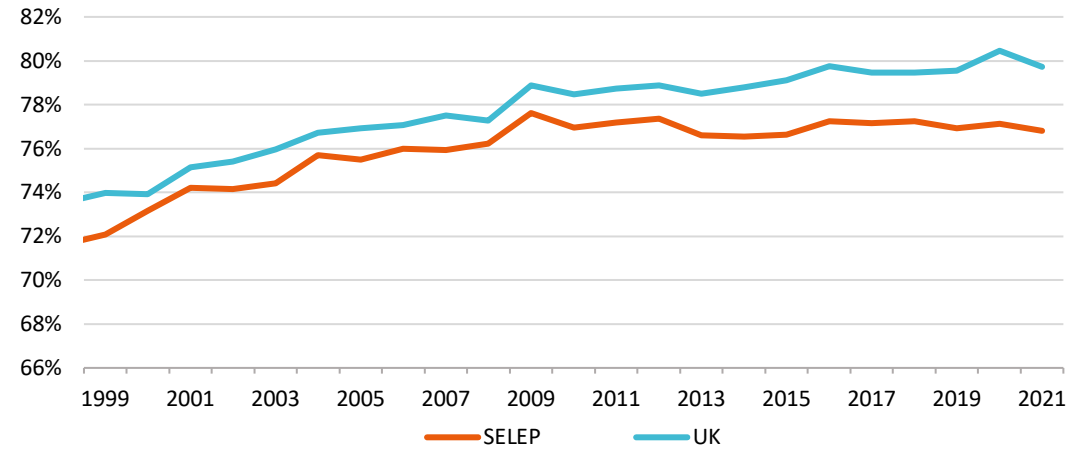


SOUTH EAST LOCAL ENTERPRISE PARTNERSHIP

For SELEP the **Services Sector** makes up **76.8%** of GVA, with **Construction** contributing **10.3%** and the **Production Sector** **12.9%**. For the UK, the respective figures are **79.7%**, **5.9%** and **14.3%**. At this high level of analysis, SELEP shows a **strong relative economic contribution** within the **Construction** sector.

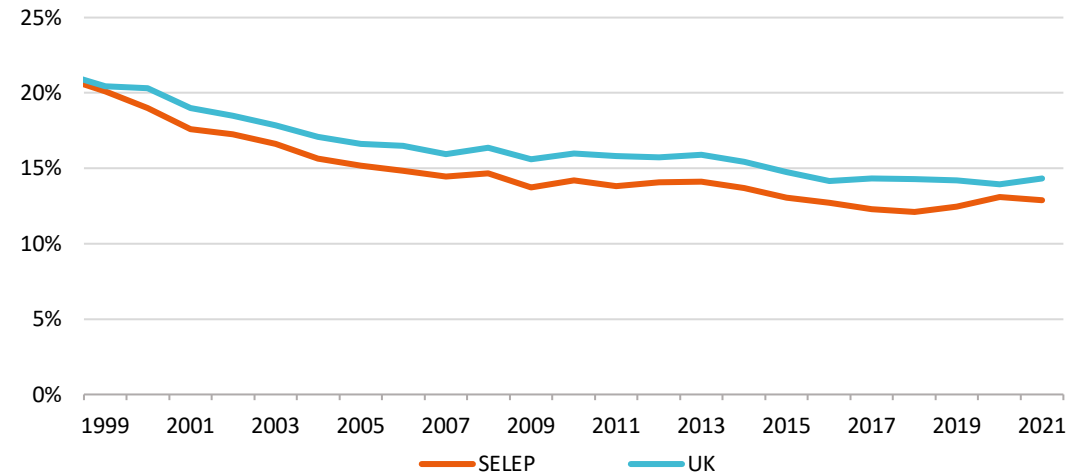
The GVA contribution from **Production** for SELEP has **declined** since 2010, more or less **in line** with a national reduction. However, **OSE** saw a **marked decline** from a **20.9% share** in 2010 to just **11.8%** in 2020, with **significant manufacturing losses** from 2013 to 2016.

Services sector share



Source: ONS, Regional GVA, balanced, April 2023

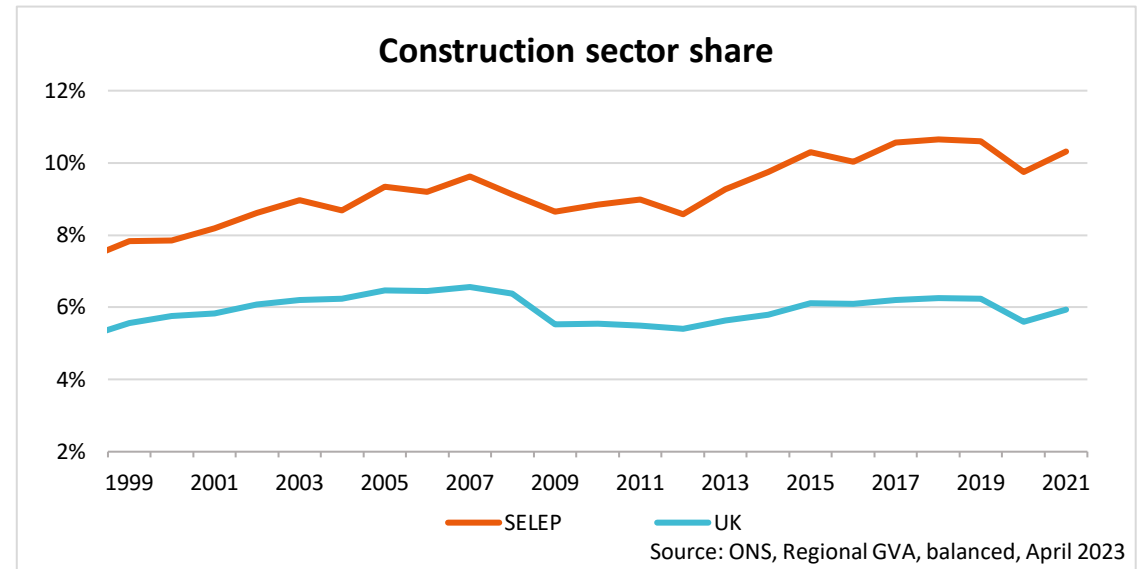
Production sector share



Source: ONS, Regional GVA, balanced, April 2023



The SELEP **Construction** sector makes the **largest** contribution to GVA for **SE** at **12.5%**, up from **11%** in 2020, but a **much lower** and **reducing** contribution for **TES**, now at a **6.9%** contribution.





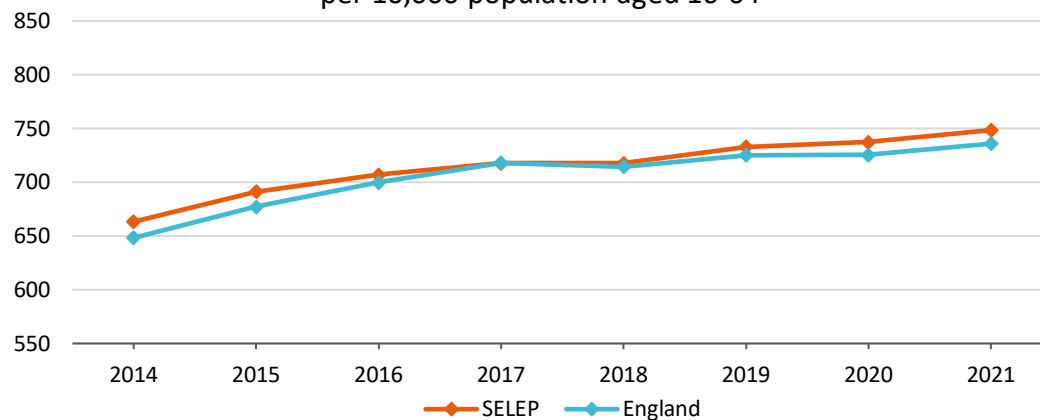
Business count data is available in two statistical publications. Business Demography provides information on **active enterprises during the course of a year (having traded at some point in the year)** along with counts of **business births** and **deaths**. The UK Business Counts publication provides a snapshot of **enterprises trading during March of each year** and provides much more detail on the **size** and **sectors** of the businesses. Both publications are used for this section. Both include businesses which are either **registered for VAT or PAYE**. Sole traders with no employees who operate below the VAT threshold are **not** counted in the figures.

There were **192,710 active enterprises** based in SELEP during 2021, which was **749 per 10,000 working age population**, **above** the national average of **736**. Across Federated Areas the enterprise rate per head of working age population was **highest in SE** at **798** and **lowest in KMEP** at **713**.

At a local authority level, the number of active businesses during 2021 was highest in **Epping Forest, Uttlesford, Brentwood** and **Sevenoaks** at **above 1,000 businesses per 10,000 working age population**. A **low level of active businesses is generally found in more coastal local authorities**, with **Hastings, Dover, Thanet, Swale, Medway, Tendring** and **Canterbury** all having **below 625 active businesses per 10,000 working age population**. However, some more coastal local authorities have an above average number of active businesses with **Wealden, Maldon, Rother**, and **Lewes** all above the SELEP average.

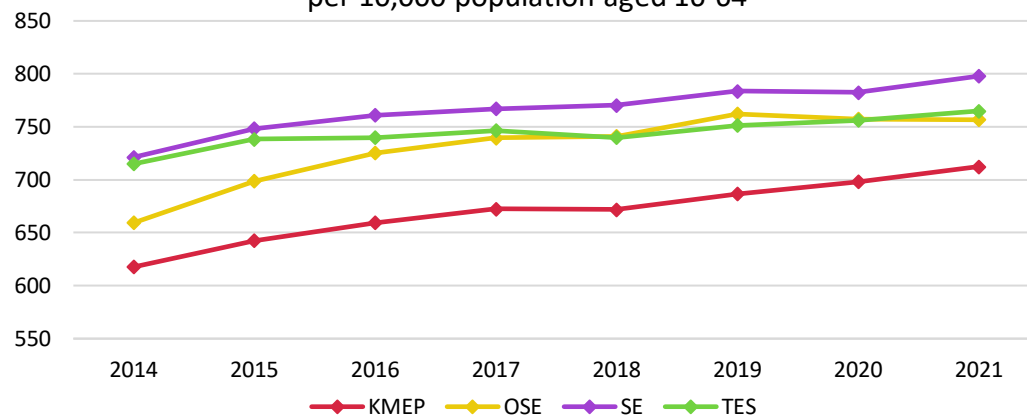
Business counts

Active enterprises during the year
per 10,000 population aged 16-64



Source: ONS, Business Demography, November 2022

Active enterprises during the year
per 10,000 population aged 16-64



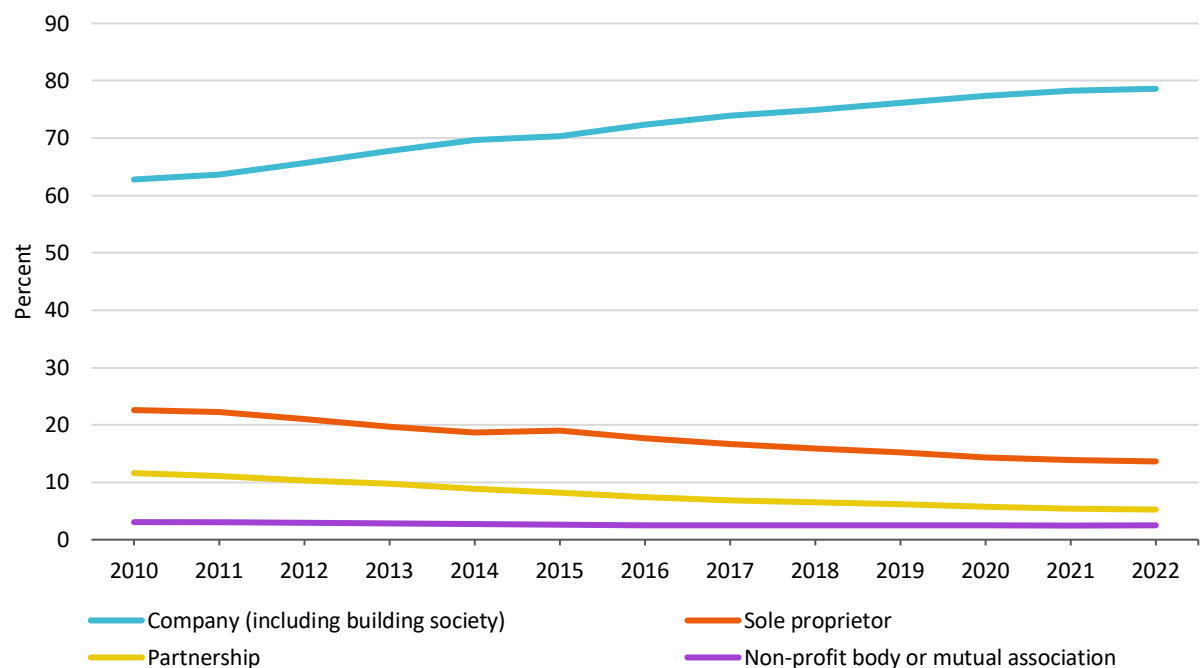
Source: ONS, Business demography, November 2022



The **stock of businesses** in SELEP at March 2022 was **178,305**, reflecting the number of businesses on a single date. This was **only 0.2% higher** than March 2021, but a **higher growth** than the England average of **0.1%**. SELEP business stock was **7.4%** of the England total and **6.4%** of the UK total. Business counts **include** some **public sector organisations**, with some **970 public sector organisations** included in the figures for SELEP.

Most private sector organisations included in the business count data are registered as **companies** which account for **78.6% of private sector business stock**. **Sole traders** account for **13.6% of business stock** but this has **reduced** over time and was **21%** in 2012. **Partnerships** account for **5.2% of private sector business stock**, also on a **reducing trend** having been **10.4%** of stock in 2012. **Not-for-profit bodies** account for **2.5% of private sector business stock**, **down** from **3.0%** in 2012. Sole Traders and Partnerships have not just reduced as a share of business stock, but have **reduced in number** as well, while the number of registered companies has **increased by over 50%**. The number of not-for-profit bodies has **increased slightly** from **4,145** in 2012 to **4,435** in 2022.

SELEP Private Sector Business Demography



UK Business Counts - enterprises by industry and employment size band



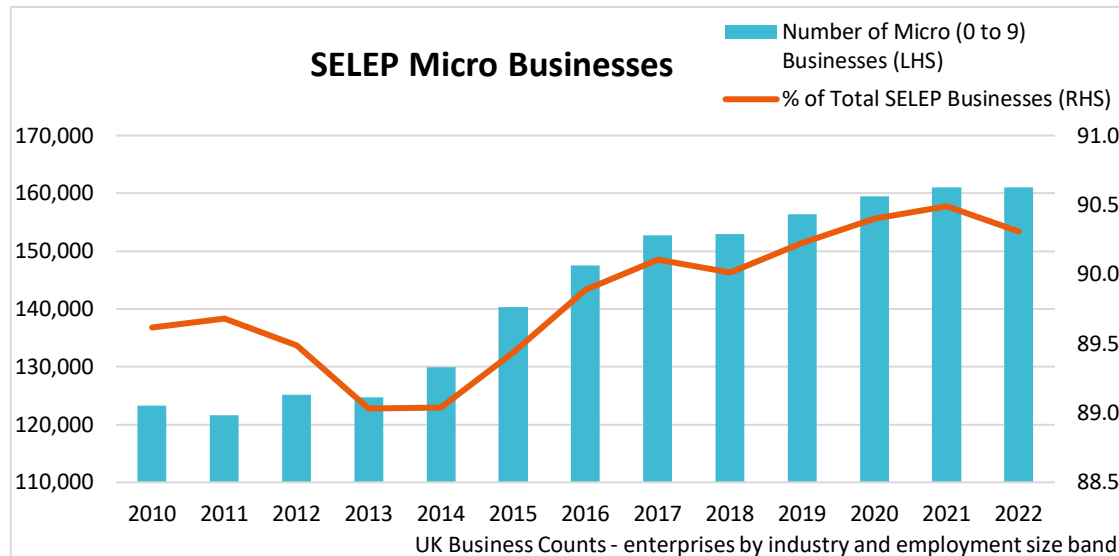
SOUTH EAST LOCAL ENTERPRISE PARTNERSHIP

Most businesses are classed as **Micro**, which means **less than 10** employees. Micro sized businesses account for **90.3%** of stock (**161,020 businesses**), **up** from **89.5%** in 2012. **Small** businesses with **under 50** employees **but more than 9** account for **8.1%** of stock (**14,380 businesses**), **down** from **8.8%** in 2012.

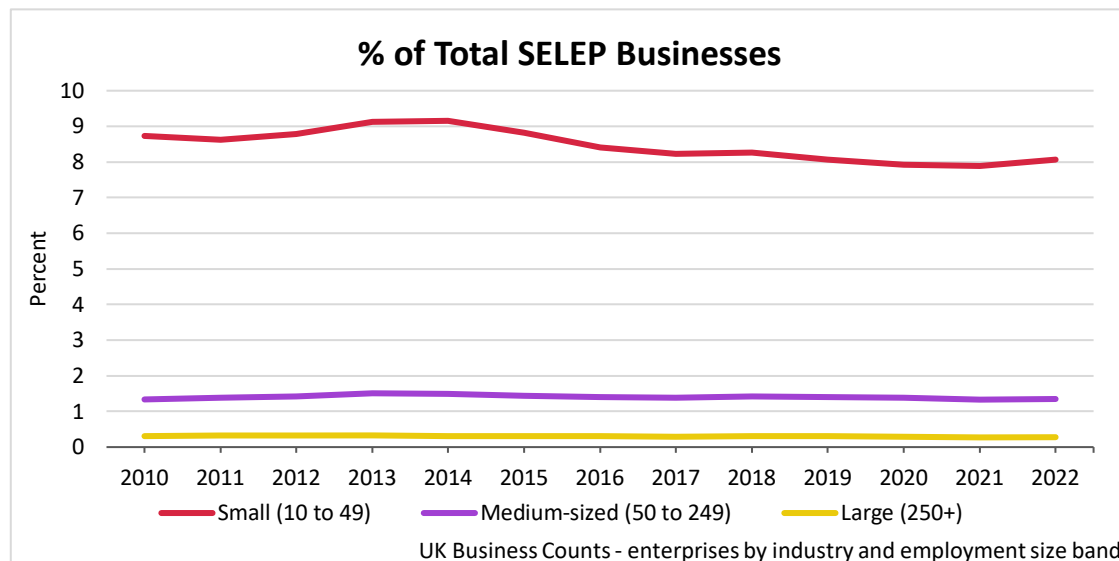
Medium sized businesses (**50 to 249 employees**) account for **1.3%** of business stock (**2,405 businesses**) **down** from **1.4%** of stock in 2012. There are **495 Large** businesses with **250 or more** employees. The number of Micro businesses has **increased** by **29%** since 2012, while the number of Small and Medium sized businesses has **increased at a much slower rate**, hence a **reducing share** of stock. The number of Large businesses **was** showing some increase up to 2019, but numbers have **since reduced** by **25**.

The SELEP share of business stock is **similar** to the national shares and has shown an **almost identical change** in shares over time as seen nationally. However, SELEP does have a **shortfall** in the number of large companies compared to the national average, the **same share** of medium sized companies, **slightly fewer** small companies, with **more** micro sized businesses. If SELEP had the same shares as seen nationally we would expect there to be an **extra 200 Large** companies, **800 more Small** companies and **1,300 less Micro businesses**. In terms of significant differences, the **shortfall of 200 large companies is most striking**. Having a slightly higher proportion of Micro business is something **SELEP shares in common with London and a number of LEs around London**. Although it is hard to make firm generalisations, it is clear that City Regions in the north of England tend to be the opposite of London and its surrounding LEs, in that they generally have a lower share of Micro businesses and a higher proportion of Large businesses.

SELEP Micro Businesses



% of Total SELEP Businesses





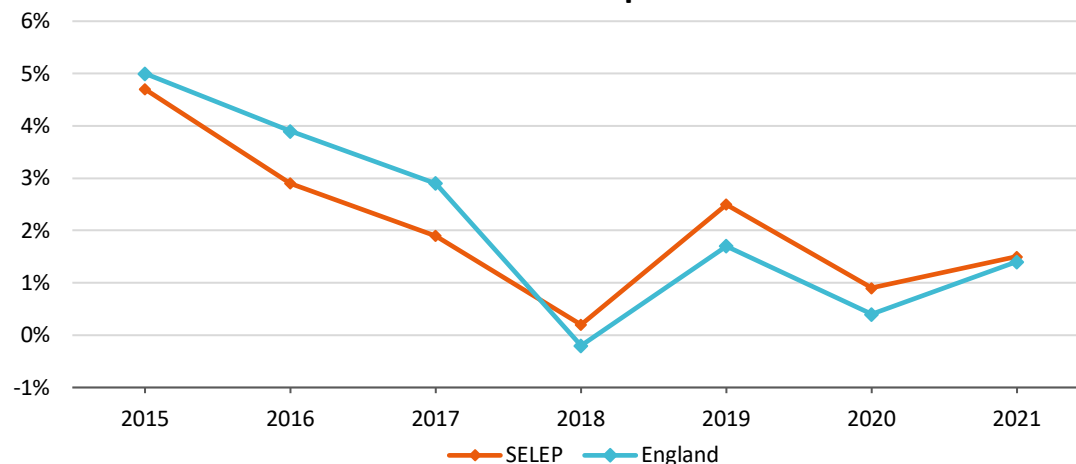
The **number of active enterprises** has been **increasing** each year over the five years up to 2021 and the annual increase for 2021 was **1.5% up** on 2020 for SELEP, compared to **1.4%** for England. Across Federated Areas growth was **stronger** for SE and KMEP at **2%**, but **negative** at minus **0.1%** for OSE.

Business Demography statistics are now available on a quarterly basis, and this shows that since mid-2021 a trend of net business **losses** each quarter has set in across the UK, and this is also the case for SELEP and all Federated Areas within. The last quarter of 2022 saw the **largest net loss** of active business since this trend started with **4,110 business creations** outweighed by **5,110 business cessations**, giving a **net loss** of **1,000 active businesses** for SELEP. This represents a loss of **3.9 businesses per 10,000 population** and compares to losses of **3.1** for the UK for the same time period. Since the trend for net business losses began there has been **higher losses** for SELEP than the UK average.

At a local authority level, net business losses over 2022 as a percentage of business stock have been highest in **Maidstone, Dartford, Brentwood** and **Rother**, all **above 2.5%** of stock. Exceptionally, **Hastings** and **Thanet** have seen a **slight increase** in business stock during 2022 with a **low level of losses** in **Colchester, Harlow** and **Canterbury** at less than **0.5%**.

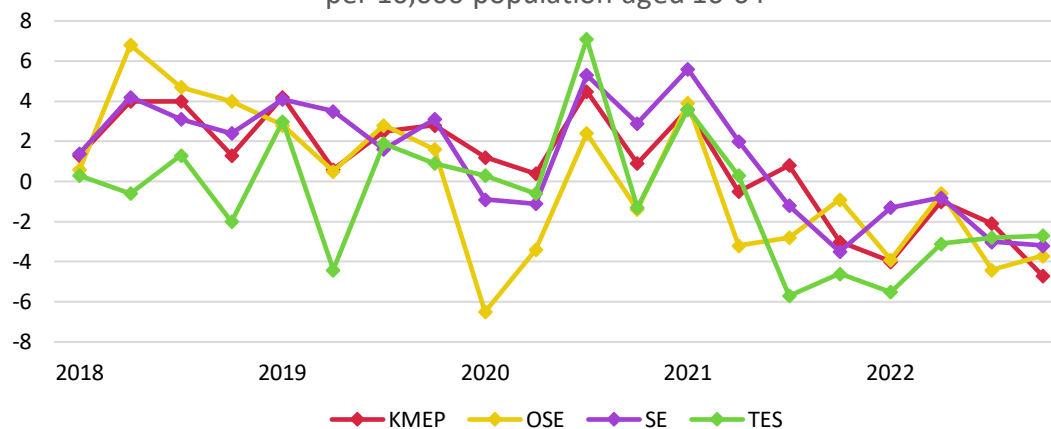
Business growth

Net Growth in Enterprise Stock



Source: ONS, Business demography, November 2022

Net enterprise growth
per 10,000 population aged 16-64



Source: ONS, Business demography, November 2022

R&D and Innovation

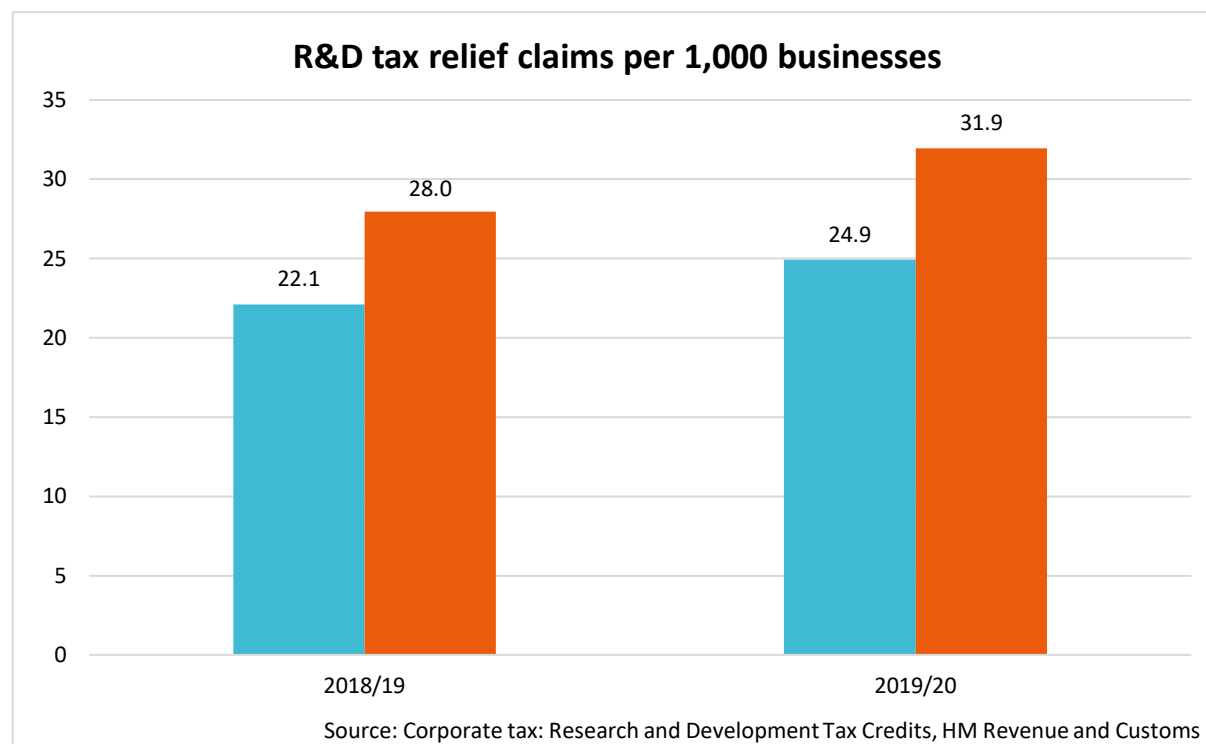
Business investment in **Research and Development** is a key driver for **innovation** and **new product** and **processes development**. Government supports such activity through grant funding with Innovate UK helping to match fund private sector research.

Businesses which invest in Research and Development (R&D) can claim **tax reliefs** and **tax credits**. Statistics on qualifying expenditure are published at Combined Authority and Upper Tier local authority level, but with some delay as **claims are made after completing a tax year**.

Information for 2019/20 tax year shows that across SELEP, businesses made a total of **4,370** claims for **Research and Development tax benefits**, with a **qualifying expenditure of £1.4 billion**. Across England **75,975** claims were made with **qualifying expenditure of £43 billion**.

For SELEP this represented **24.9 claims per 1,000 businesses** at an **expenditure rate of £8.1million per 1,000 businesses**. For the previous year 2018/19 there were **22.1 claims made per 1,000 businesses** at an **expenditure rate of £8.5 million per 1,000 businesses**. Research and Development claims for SELEP were **significantly below** the national average of **31.9 claims** and **£18.3 million per 1,000 businesses**.

Nationally the **highest spend on R&D** is by businesses based in **Cambridgeshire, Reading, Inner London and Oxfordshire**. Kent and Essex are **fairly middle of the pack** compared to other upper tier local authorities, with Southend, East Sussex, and Medway having **very low** business investment in R&D. Thurrock had the **lowest** rate of business investment in R&D in England in 2019/20 and was at a **low** rate in 2018/19 as well.

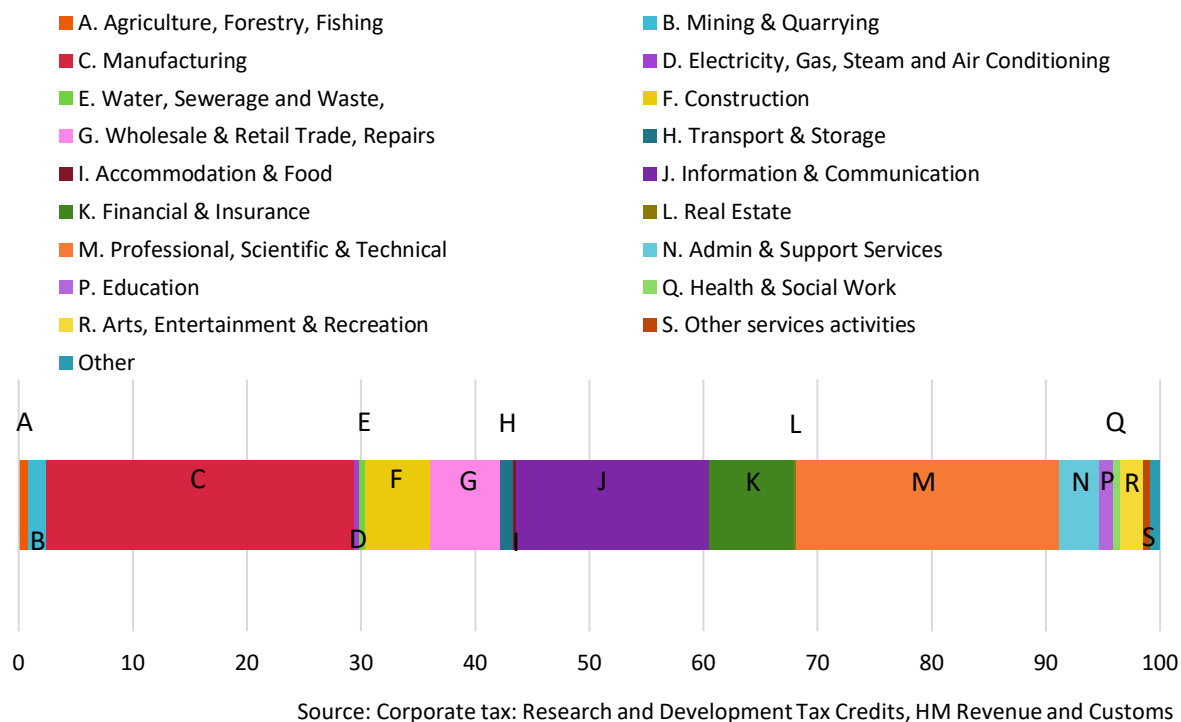


While all sectors of the economy engage to some degree in R&D activity, the majority of spend is concentrated within a few key sectors, with **Manufacturing** businesses accounting for **27%** of national business R&D expenditure, with **23%** spent within the **Professional, Scientific and Technical** sector and **17%** within the **Information and Communication** sector. The same sectors tend to have a high proportion of businesses engaging in R&D at **13.2%** for **Manufacturing** and **7.6%** for **Information and Communication**, and while a **much lower** proportion of **3.4%** of **Professional service** sector businesses engage in R&D this is **higher** than other sectors **except Mining and Quarrying, and Utilities**.

Analysis of government grants from UK Research and Innovation, which includes Innovate UK and other research councils shows a spend of **£3.4 billion** for 2019/20. This spend **varies** across LEP areas with research institutions in **Oxfordshire** securing funding of **£718 funding per head** of working age population, and **Greater Cambridge** and **Peterborough** some way behind in second place for funding awarded at **£461 per head**. Funding between **£100 and £250 a head** was received in 7 LEP areas (including **London**), with institutions in **all other** LEP areas receiving **below £100 per head**.

UKRI funding allocations in the SELEP area are amongst the **lowest** in the country at just **£11 per head**. Funding is also **low** (**£50 or less per head**) in some of the most economically successful areas of the country, such as: **Enterprise M3, Coast to Capital, Thames Value Berkshire** and **Hertfordshire**. For 2019/20 institutions in the north of the country received more funding ranging from **£60** in **Liverpool** to **£138** in **York** and **North Yorkshire**.

National R&D Expenditure by Sector



In cash terms, London received the **largest share** of UKRI funding at **£635 million**, with the **North East, Birmingham, Manchester**, and other LEP areas in the **Midlands** receiving **over £100 million** each. In comparison **SELEP received £28 million**, the bulk of which was allocated to **University related activity** in **Colchester** and **Canterbury**. The majority of local authority areas in SELEP received **no funding** or **below £1 million**.

The **largest UKRI funding award** during 2019/20 for SELEP was **£6.1 million** for the **Research Centre on Micro-Social Change (MiSoc)**, a multidisciplinary centre of quantitative social scientists engaging in cutting edge research and providing evidence with which to address key societal challenges. MiSoC has been based at the University of Essex since 1989.

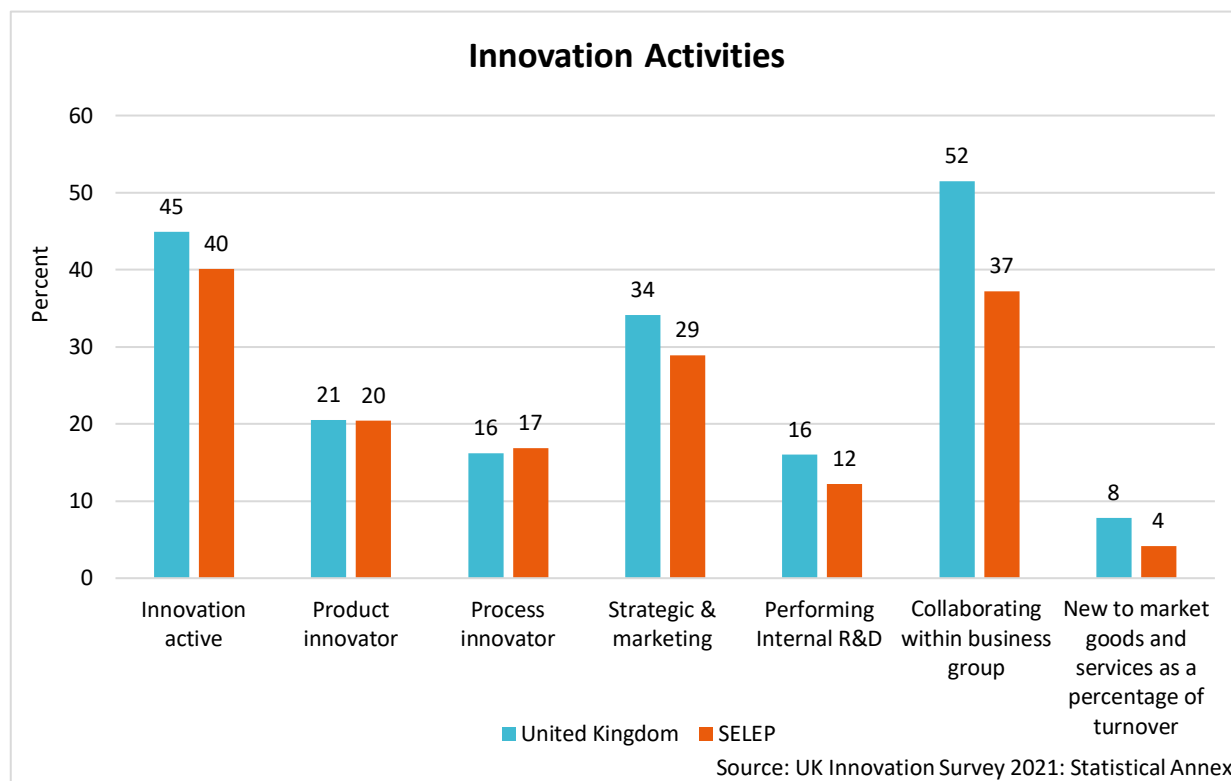
Of the total UKRI funding for the SELEP area there was **£13.5 million** from **Innovate UK (IUK)**, which was **down** on previous years, with **over £20 million received in the two previous years**. Much of this funding was received by **small or micro private sector businesses**, through collaborative R&D projects with a strong focus on issues such as **Clean Growth** and **Manufacturing**. Some **£1.7 million** was for universities to engage in **Knowledge Transfer Partnerships**, with Essex University being a **top national recipient** for such funding.

For businesses in receipt of IUK funding these tended to be in **Professional Design, Other Professional** and **Scientific and Engineering sectors**. There was a **near equal split of funding** between **Kent** and **Essex** with **much smaller or no funding** to other upper tier local authority areas in SELEP. At a more specific locational level, **Brentwood, Colchester, Maidstone** and **Sevenoaks** were top for funding received.

Some examples of key projects funded by IUK in 2019/20 across SELEP included **modular house design** in **Brentwood**, **Quantum technology** in **Maidstone**, **Offshore energy generation** in **Sevenoaks**, **Brain-computer interfaces** at **Essex University**, and **Wireless (remote controlled) vehicle charging** in **Sevenoaks**.

The UK Innovation Survey (UKIS) is a biennial survey conducted by government to identify levels of innovation by sectors within the UK economy. The survey uses a wider definition than traditional R&D, producing an overall estimate that **45% of UK businesses are innovation active**, although this definition, includes purchase of computer software as an “innovative” activity. At a LEP level, SELEP comes out **below the national average** at **40.1%** of businesses being innovation active. At a more detailed level of activity type, a **similar proportion of SELEP businesses engage in product or process innovation** and also **internal R&D**, but a **much lower** proportion **engage in collaborating within a business group**.

The UKIS also shows that innovation rates and product innovation are **much higher** for **Manufacturing, IT and Professional services sectors**, and **much lower** in **Construction and Transport and Logistics**. Given that the SELEP economy is more concentrated in the latter sectors, with less of a presence for the former sectors, this would account for a comparatively low rate of innovation active businesses within the SELEP area.





Businesses based in the SELEP area exported goods to the value of **£9.6 billion** in 2021, of which **£4.9 billion (51%)** was to the **EU**. Exports to the EU previously made up a **46%** share of total exports, but this is **increased** in 2020 and again in 2021, **mainly due to a significant fall in exports to non-EU countries**, with **wider international trade having fallen away more during COVID** and recovering **more slowly** than **EU trade**.

The exports of goods from SELEP accounted for **3.1%** of total UK exports in goods in 2021, which was a **higher** share than the previous four years and the **same** as in 2016. For the UK as a whole, the value of exports of goods in 2021 was **10% less** than in 2019, but only **5% lower** for the SELEP area. The value of UK exports to the EU **fell** by **8%** between 2019 and 2021, but the SELEP area saw an **increase** of **4%** in EU export value over the same time period.

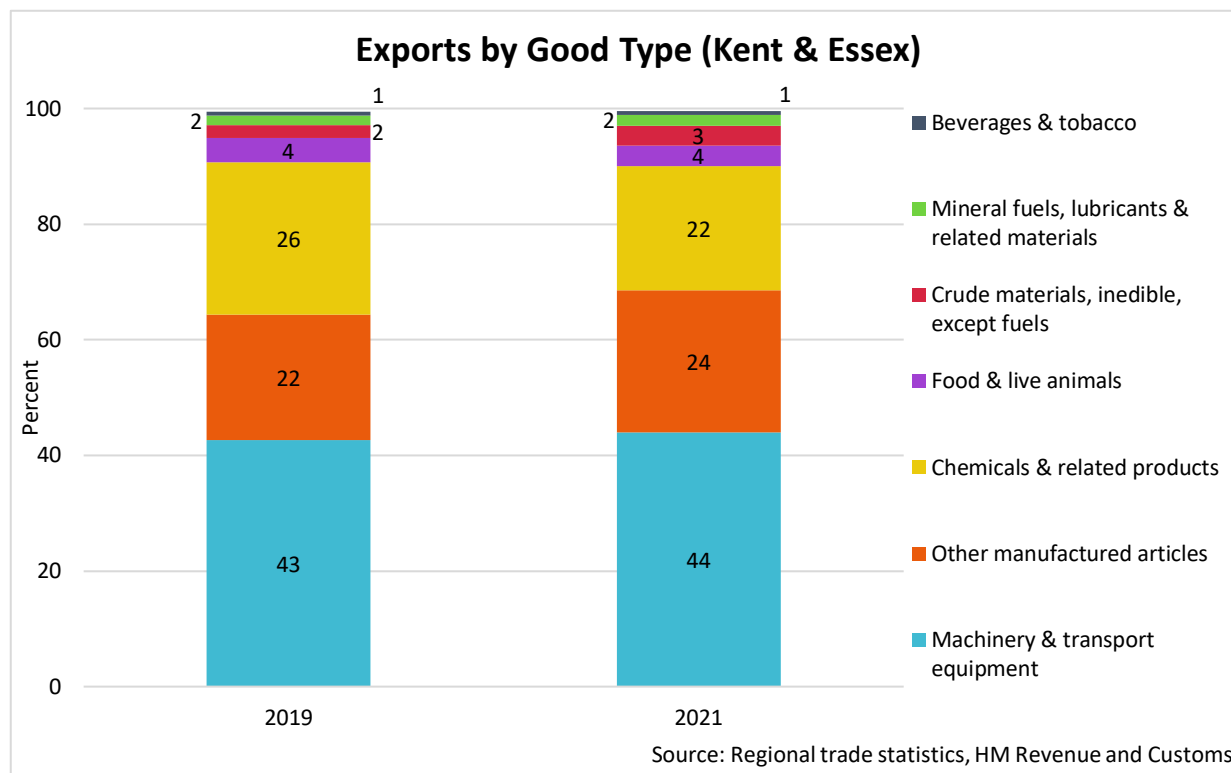
The **strongest concentrations** within SELEP of businesses exporting to the EU are found in **Thurrock**, with **7.7%** of businesses engaging in EU exports. The **Kent Thames Gateway** and **Mid-Kent** areas also have **relatively higher** concentrations of businesses exporting to the EU. **East Sussex** and **Southend** have **lower shares** of businesses which export to the EU, at **4.7%** and **5.1%** respectively. The **same geographic spread** is seen for businesses which export to non-EU countries, but with lower propensities at **5.9%** in **Thurrock** and **4.0%** in **East Sussex**. The data as published does not identify how many businesses export both to the EU and elsewhere, but we might expect that a business engaged in exporting goods will seek to trade both in the EU and elsewhere.





Breakdowns of exports by goods type are quite limited, and only provided for **Kent** and **Essex** counties (including unitary local authorities). For Essex and Kent, we can identify that **Machinery and Transport Equipment** is the **main export** in value terms, at a **44%** share, with the **bulk** of this exported from **Essex**. **Other manufactured articles** then account for a further **24%** share of exports, with a **fairly even** split between **Essex** and **Kent**. **Chemicals and related products** make up another **22%** share of exports and this is **mostly** produced in **Kent**. **Food and live animals** account for **4%** of exports, **crude materials** **3%**, **fuels** **2%** and **beverages** **1%**.

Between 2019 and 2021, **Kent** and **Essex** saw **large declines** in the **value of exports** of **Chemicals, Food and Beverages** of **20% or more**. **Growth** in **value of exports** was seen in **Crude materials, Fuels** and **particularly** in **Other manufactured goods**. Generally, there were **declines** across all good categories for **non-EU exports**, with **significant falls** in the value of **Chemicals**. Conversely there was **growth** in EU exports for most categories of goods, but with **sizable losses** for **Food** and some minor losses for **Chemicals**.



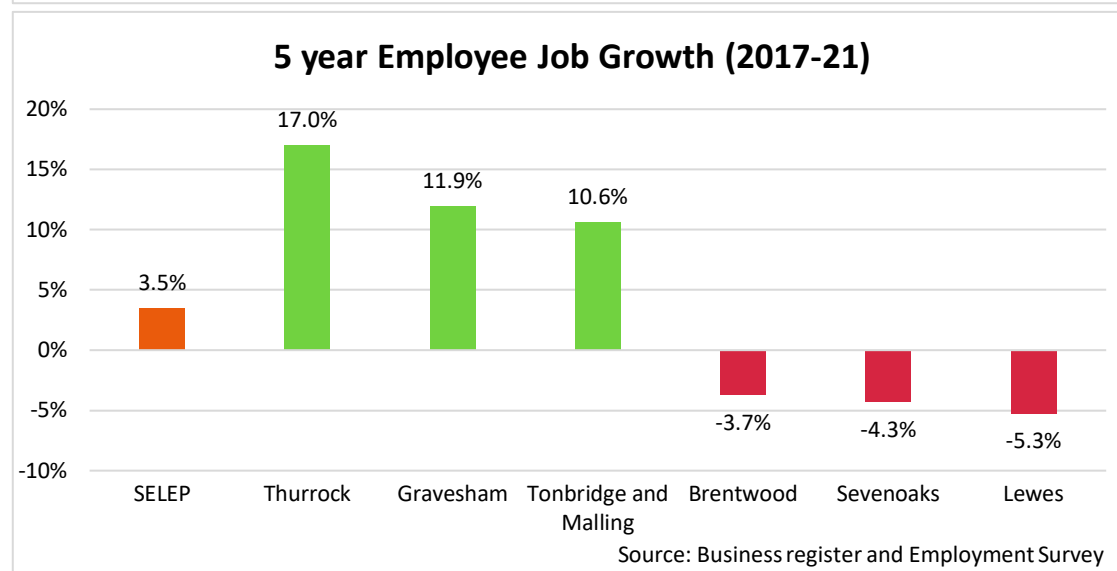


Employee jobs

Data from the Business Register and Employment Survey (BRES) recorded an estimated **1,652,000 employee jobs** across SELEP in 2021. There was an estimated **3.5% growth** in employee numbers over the previous five years, representing **56,000 more jobs**. The 2020 figures had shown a **sharp decline** due to the pandemic, but numbers **more than recovered** in 2021, being **1.6% higher** than the pre-pandemic 2019 numbers.



Growth has been much **higher** across **OSE** at **5.1%** over five years and **lowest** in **SE** at **2.6%**. At a local authority level, **Thurrock, Gravesham and Tonbridge and Malling** all saw **growth** of **more than 10%** over five years, while employee jobs number **fell** by **over 2.5%** in **Lewes, Sevenoaks, Brentwood and Braintree**.





In the 2 years since 2019, Thurrock, Eastbourne, Dartford, Rochford, Tonbridge and Malling and Harlow all saw employee job **growth** of over 5% **suggesting these places have benefited from economic change over the course of the pandemic** with Sevenoaks, Folkestone and Hythe, Lewes, Colchester and Castle Point all having net job **losses**.

The **largest** employment sectors across SELEP are **Health, Retail** and **Education** which together provide **34%** of total employee jobs. In the last five years the number of jobs has **increased** most in **Construction**, with **Transport and Storage, Health** and **Food and Accommodation** also seeing **large increases** in employee job numbers. Over the same time the number of **manufacturing** jobs has **reduced** by **10,000** with **losses** also in **Motor Trades** and **Information and Communication**.

Compared to England as a whole, SELEP has **low shares** of employee jobs in **Professional Services, Information and Communication, Manufacturing** and **Financial Services**. SELEP instead has **higher shares** of employment in **Construction, Retail and Transport** and **Storage**. In terms of employee growth, SELEP has had a **lower** than national rate of increase in sectors such **Information and Communication, Manufacturing, Arts and Entertainment** and **Financial Services**. Instead, SELEP has seen **stronger** growth in **Construction** and **Transport and Storage**.

It should be noted however, that some sectors where SELEP have a below national average share of employees, are also sectors which tend to be **highly concentrated in a few areas**. So, for example Professional Services are highly concentrated in London and to the north and west of London including Oxford and Cambridge, as well as in other large cities such as Manchester, Liverpool and Leeds. Compared to most LEP areas, SELEP actually has a **better** share of employment in **Financial Services**, and similarly in **Information and Communication** where SELEP has **nearly as strong** a presence in this sector as big cities such as Manchester and Leeds. Only in **Manufacturing** does SELEP have a **low** level of employees compared to other LEPs, but this is shared in common with London and home counties in general. Sectors are explored in more detail [here](#).

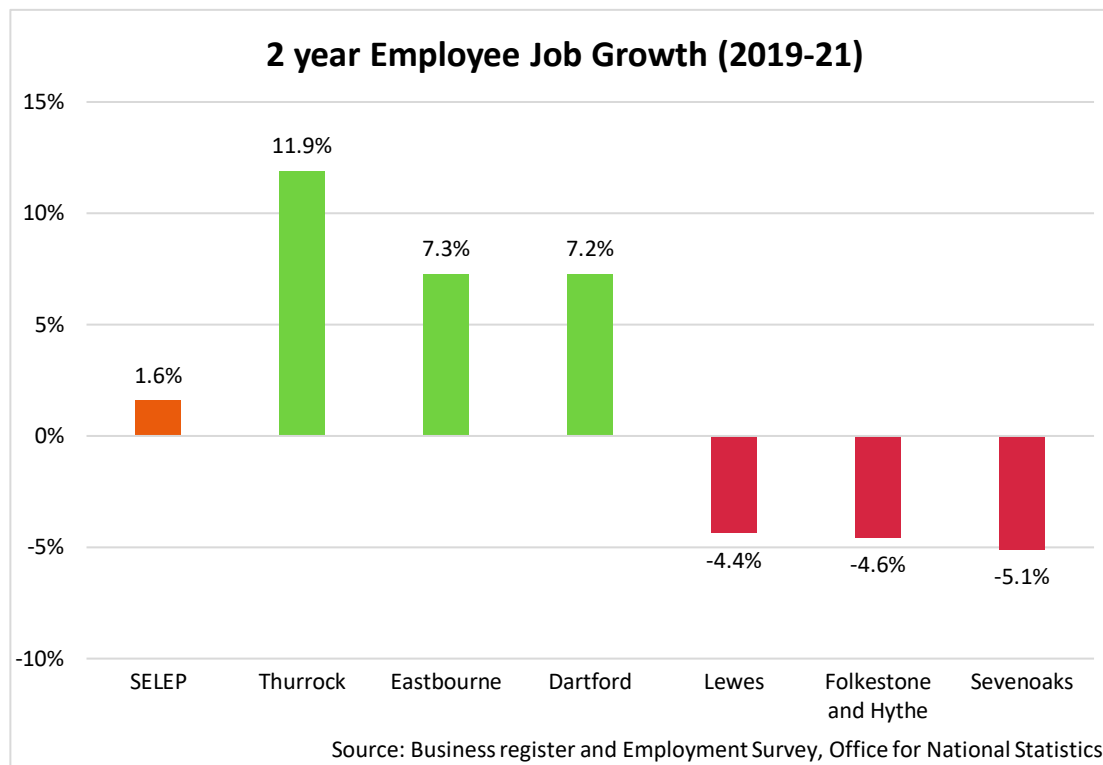


Table 1 - SELEP Employee jobs

Industry (broad industrial sectors)	2016	2021	5 Year Growth	Share of total 2021
Health	219,000	230,000	11,000	14%
Retail	172,000	177,000	5,000	11%
Education	157,000	156,000	-1,000	9%
Business administration & support services	141,000	146,000	5,000	9%
Construction	101,000	123,000	22,000	7%
Accommodation & food services	113,000	123,000	10,000	7%
Professional, scientific & technical	109,000	116,000	7,000	7%
Transport & storage (inc. postal)	91,000	106,000	15,000	6%
Manufacturing	108,000	98,000	-10,000	6%
Arts, entertainment, recreation & other services	73,000	67,000	-6,000	4%
Public administration & defence	59,000	64,000	5,000	4%
Wholesale	65,000	60,000	-5,000	4%
Information & communication	48,000	46,000	-2,000	3%
Financial & insurance	42,000	42,000	0	3%
Motor trades	38,000	33,000	-5,000	2%
Property	27,000	27,000	0	2%
Mining, quarrying & utilities	16,000	21,000	5,000	1%
Agriculture, forestry & fishing	17,000	17,000	0	1%
Total	1,596,000	1,652,000	56,000	

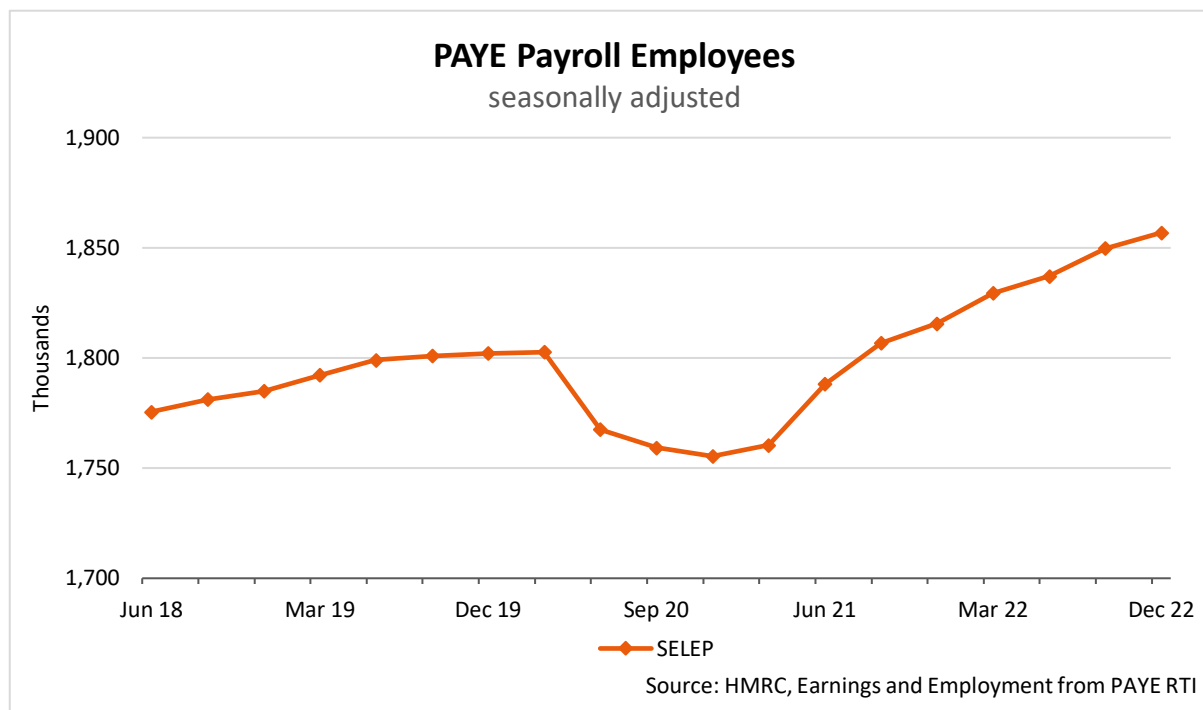
Source: ONS, Business Register and Employment Survey

PAYE employee jobs

An alternative and more frequent data source for employee job numbers is now available from HMRC PAYE real time information systems. This data source does not provide the same level of local detail, such as sector of jobs, that is available from the BRES data. Another important distinction is that it provides information by **place of residence of employee** and **not place of work**.

HMRC data suggests that for December 2022 there were **1,857,000 payrolled employees** living in SELEP, and in September 2021, some **1,806,700**, so a much **higher** number than provided by BRES for the same date, due to a **high level of commuting from SELEP into London for jobs**. HMRC data suggests **much higher employee numbers in most coastal areas**, showing that more people in these areas have to commute elsewhere to find work.

Resident employee jobs in SELEP **grew** at a high rate of **2.2%** during 2022, **slightly behind** national UK job growth of **2.3%**. Much of this growth reflected **recovery from the job losses during the pandemic**, with growth over 3 years to December 2022 at **3.0%**, again **slightly below** national UK growth **3.2%**. However over five years SELEP has job growth of **5.2%** compared to UK growth of **5.1%**. in summary, employment growth for SELEP residents was **higher** than national in the **pre-pandemic period**, **reduced less** than national in **2020**, but has **grown more slowly** than national over the **last two years**.



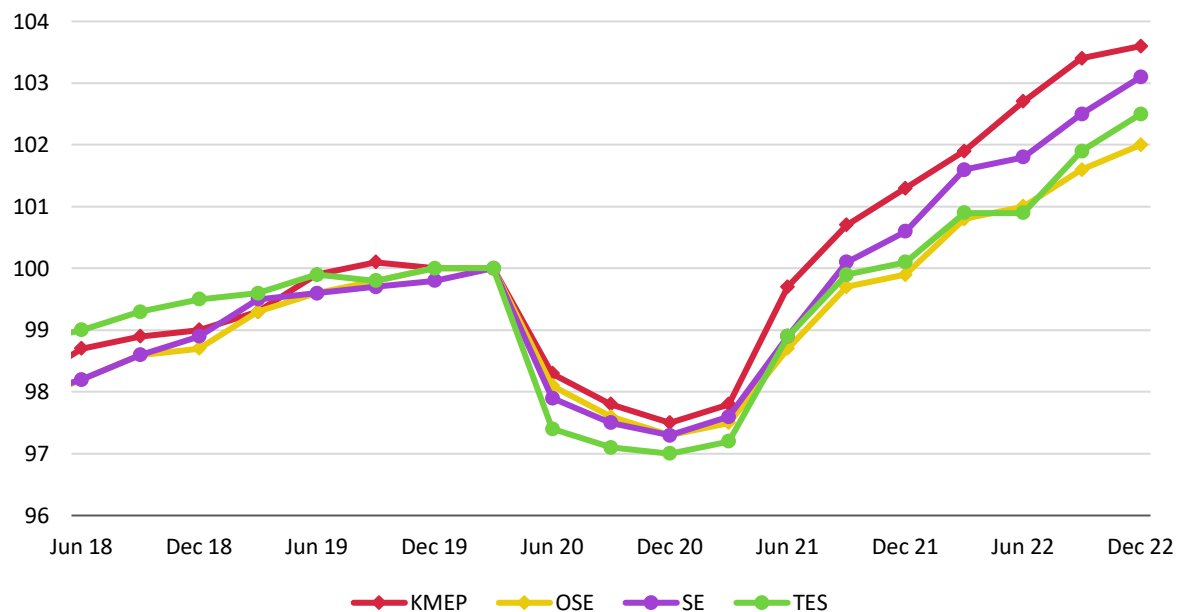


At a Federated Area level, **KMEP** had the **strongest employee growth** of **5.9%** over five years and has seen **equal** to national growth in the last year. **SE** has had similar but **slightly lower** growth. **TES** and **OSE** have had **below** national growth, but with reversing fortunes, with **TES** previously having **low** growth, but now **matching** the national average, whereas **OSE** previously had the **highest** employee growth in SELEP and now the **lowest**.

At a local authority level, **Dartford** and **Maidstone** have both seen employee **growth** of **more than 10%** over five years, with strong **growth** also in **Uttlesford** and **Ashford**. The **lowest** growth was mostly seen in **coastal areas** with **Hastings**, **Castle Point**, **Thanet**, **Lewes** and **Eastbourne** with the lowest growth between **2% and 3.1%**. However, employee growth in **Eastbourne** has been **3.5%** during 2022, the **highest** across SELEP and just above **Dartford** and **Maidstone** which continue to see high growth. The **lowest** growth in the last year has been in **Thanet**, **Maldon**, **Hastings** and **Castle Point**. Across **OSE** and **TES**, only **Wealden** has seen persistent above national average employee growth over time.

PAYE Payroll Employees Index (Mar-20=100)

seasonally adjusted



Source: HMRC, Earnings and Employment from PAYE RTI

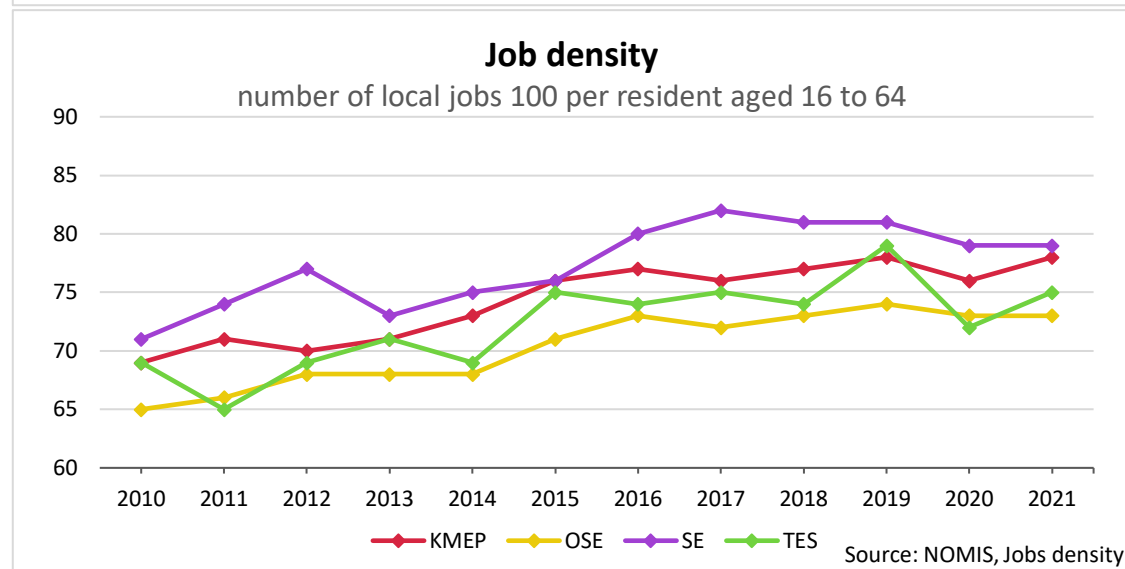
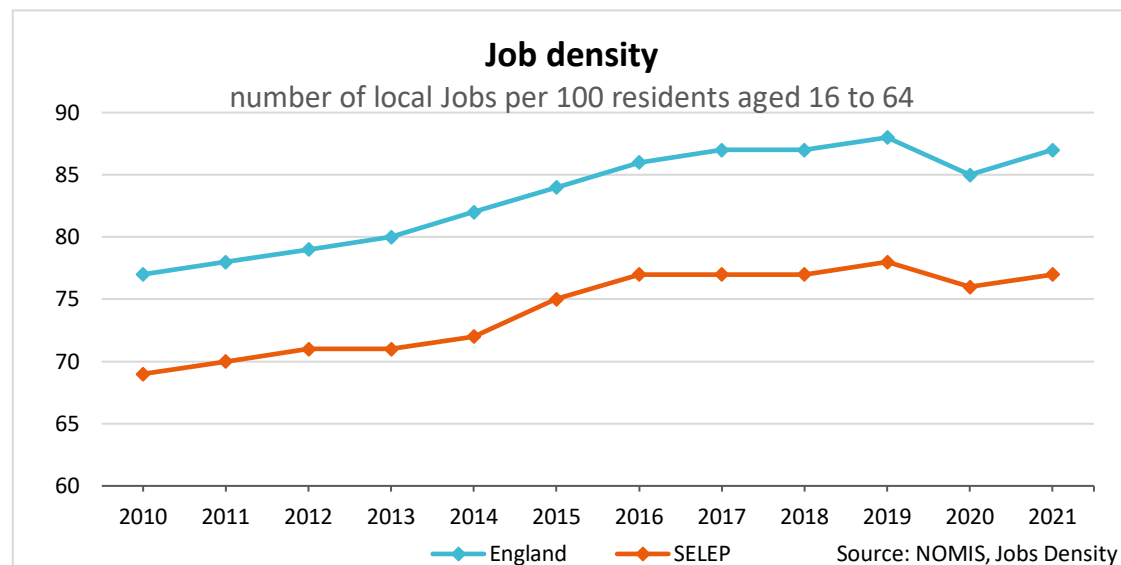


Job density

The above analysis on employee jobs highlights the difference between **jobs in an area** and **people living in an area who have jobs**. Looking at the differences between these figures for an area, identifies if an area is a **net inward** or **outward commuting area**. A simple way to look at this is to use figures on job density, which is defined as the **number of jobs in the local area for every 100 working age people in the area**. Job density figures also include **self-employed people** which are not counted in employee numbers.

The England average job density for 2021 was **87 jobs per 100 working age residents**, reflecting that **not all people are economically active**. For the SELEP area the figure was **77**, identifying that SELEP residents have a **reliance on commuting out of area to obtain sufficient jobs for local needs**. Job density has **increased significantly** over time and for England was **78** in 2011, reflecting an **increase** in economic activity rates over time. The gap between SELEP and the national rate of job density has **remained** broadly the same over time.

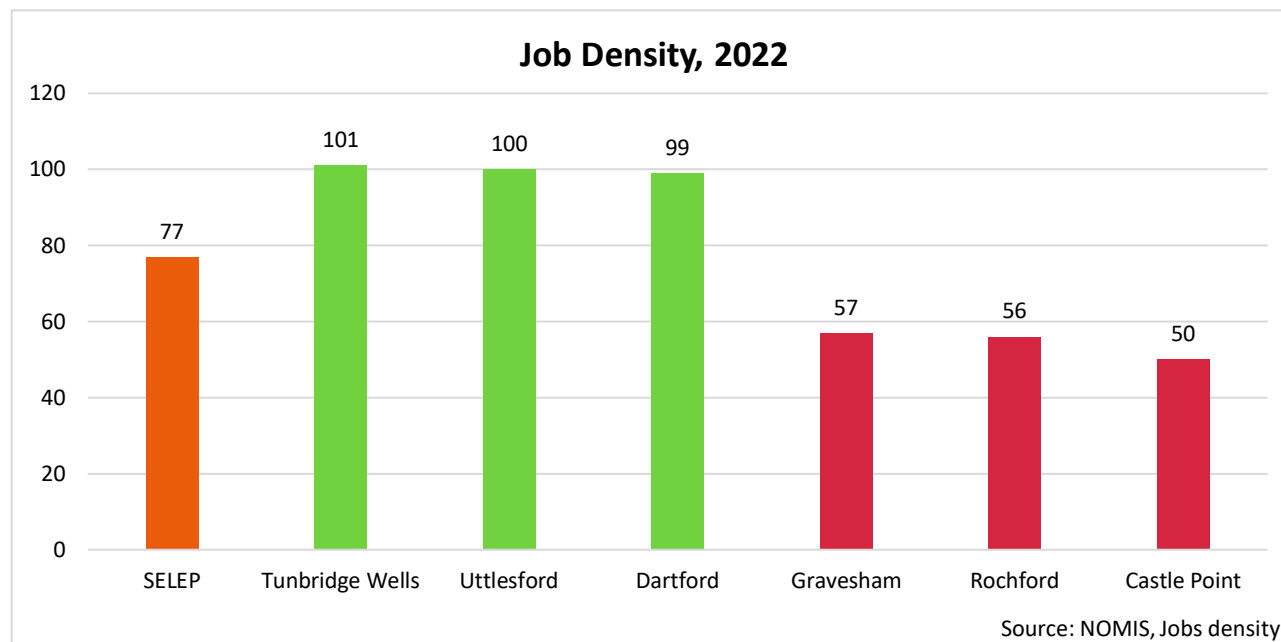
Current job densities across Federated Areas reflects a **consistent relative position over time** with **SE** having the highest at **79**, **KMEP** next at **78** with **lower** figures of **75** for **TES** and **73** for **OSE**. All areas are **below** national average, with dependency on commuting to London or elsewhere for jobs a **common issue**.





Only a **small number** of local authority areas across SELEP can be considered to be **net inward commuting** areas, where **job density is above the national average**. In 2021 these were **Tunbridge Wells, Uttlesford, Dartford, Tonbridge and Malling, Ashford, Chelmsford and Sevenoaks**. Previously, **Maidstone, Colchester and Harlow** had job density above national average, but now have **lower** job density than in 2011, with job density in **Harlow** having **declined significantly** since 2018.

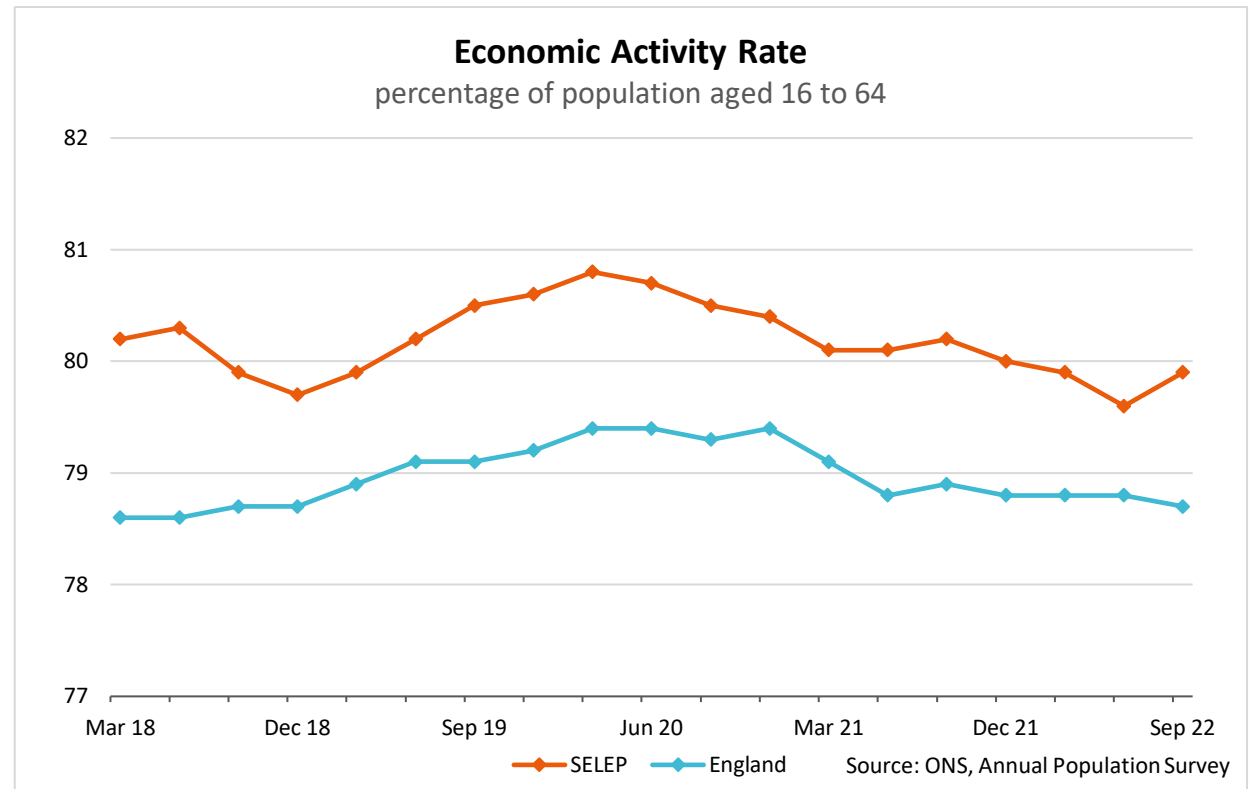
In SELEP, job density gets as **low** as **50** in **Castle Point**, which is one of the **lowest** in the country, with **Swale, Medway, Gravesham and Rochford** all with job density at **65 or below**. The list of local authorities with lowest job density has **hardly changed** since 2011, with **Dover** previously on the list, but still with very low job density and **Swale** having been added to the list.





Economic activity rate

Standard figures for economic activity rates come from the national **Annual Population Survey** which is designed to give robust results at a regional level. Published results at a local authority level come with such **wide statistical confidence intervals** that any form of comparative or trend analysis is impossible. For example, the reported economic activity rate for Brentwood jumped from 62.3% to 79.3% in the last year with this change almost entirely due to random statistical sampling error, rather than real change.

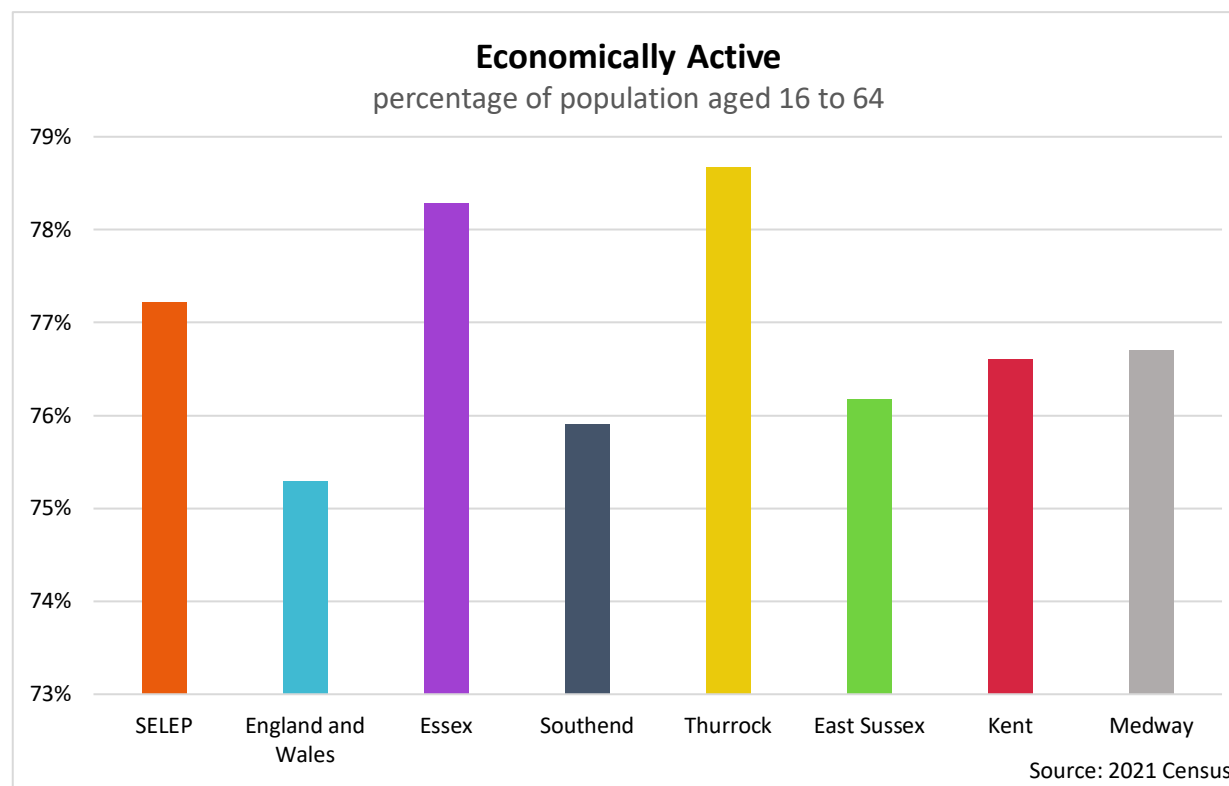


Census 2021 results are now coming available and provide reliable local estimates for economic activity for the first time since the 2011 Census. The results of the Census were however impacted by the **pandemic** and with many people of furlough, and so **will not reflect normal circumstances**.

The 2021 Census records an **overall economic activity rate** for working age people (16 to 64) living in the SELEP area of **77.2%** compared to the England and Wales average of **75.3%**. All Federated Areas were **above national average** with rates above **78%** in SE and OSE.

Rates were **very high**, above 80% in Uttlesford, Dartford and Braintree. **Lower rates tend to be found in coastal areas** with Canterbury, Tendring, Thanet, Hastings, Eastbourne, Rother and Folkestone and Hythe all **below 75%**. The very low economic activity rate in Canterbury is due to the **large student population**, most of whom reported being economically inactive.

Reasons for economic inactivity vary across places, with high levels of inactivity due to **illness** or **disability** being a common factor for most places with the highest inactivity rates. However, the number of people who are inactive due to **looking after home or family** is also high in **Tendring** and **Thanet**, and for **Rother** the main cause of economic activity is **early retirement**, with high levels of early retirement also found in **Tendring**.



Self-employment rate

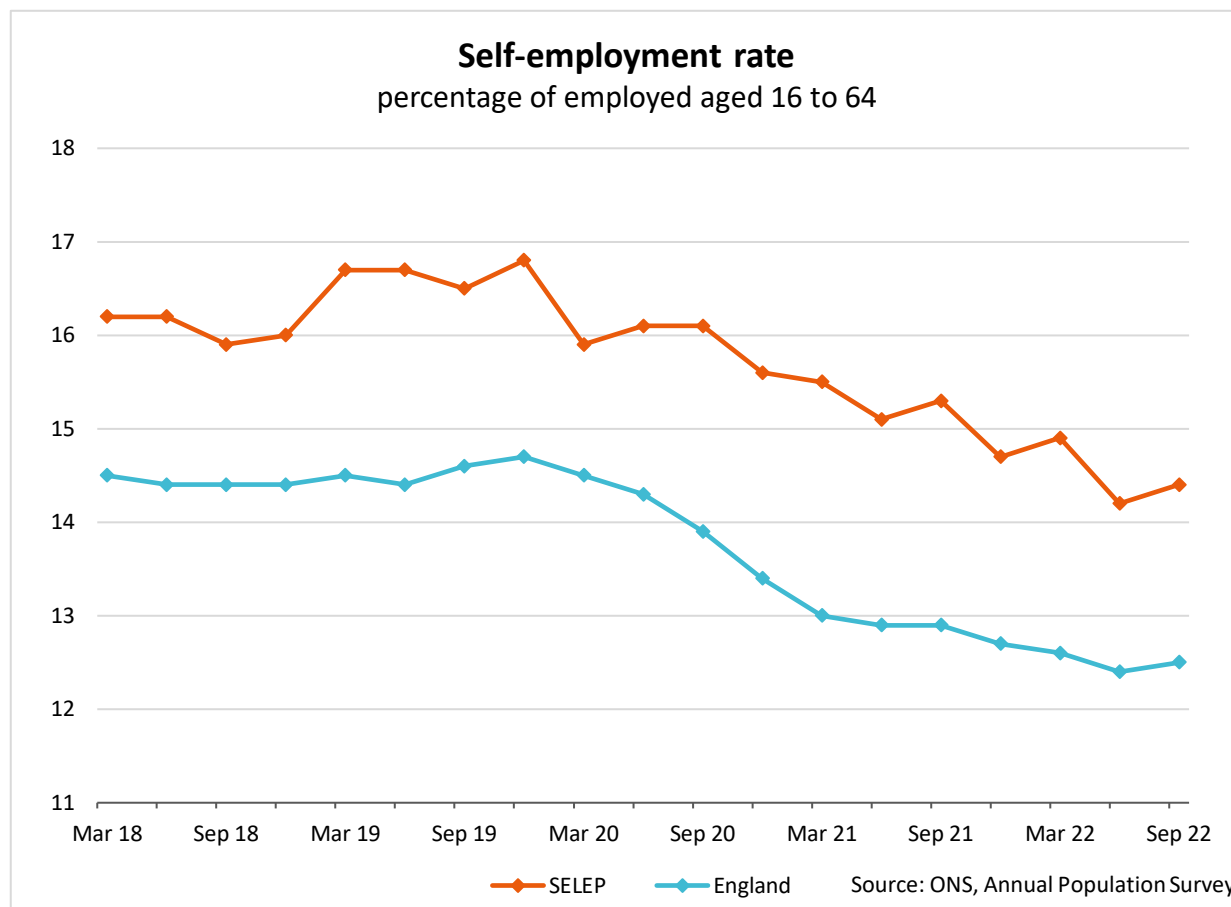
As with economic activity, we can draw on the 2021 Census to obtain reliable estimates of self-employment at a local level for the first time since the last census, although the results during a pandemic do not represent normal circumstances.

Across SELEP **13%** of working age people reported as being **self-employed** for the Census, compared to **11.1%** for England and Wales. This represented **16.9%** of those in employment for SELEP compared to **14.8%** for England and Wales. Self-employment rates are **particularly high** in **East Sussex**.

Some local authority areas recorded **very high** rates of self-employment with **Wealden** at **17.8%**, one the **highest** rates in the country. **Rother**, **Lewes** and **Epping Forest** also had **very high** rates.

Only Harlow at **11.0%** was **below** the England and Wales average.

Data from the Annual Population Survey (APS) estimates that rates of self-employment have been **falling** nationally and for SELEP since the start of the pandemic. In September 2022 SELEP was still estimated to have self-employment rates **two percentage points above** the national average, but the rate has **fallen** to about **14.4%** of those working age people in employment, having **fallen** by **more than two percentage points** since December 2021. It should be noted that these figures are not directly comparable to the census, with the census estimating higher rates of self-employment than the APS.



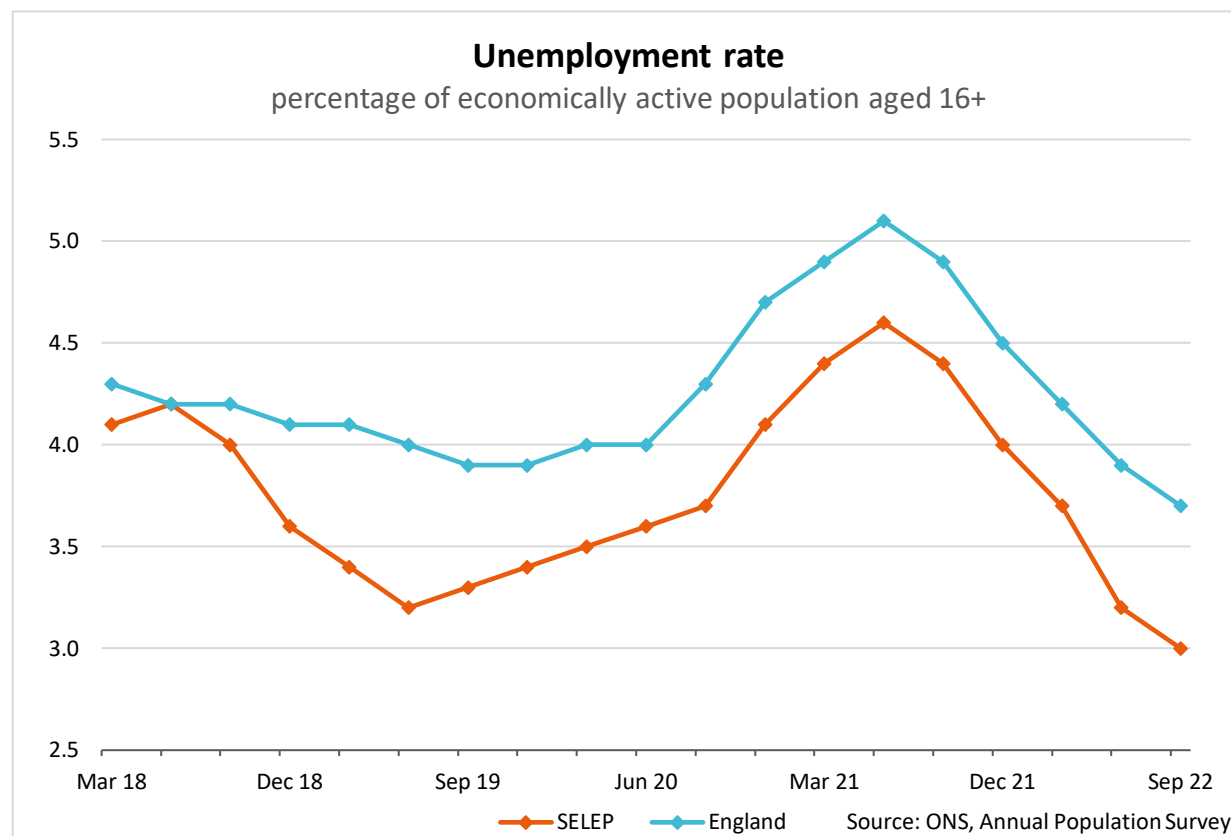
Unemployment rate

The unemployment rate is another measure where we can use the 2021 Census for more local results and comparison, and the Annual Population Survey (APS) for trends at a higher geographic level.

The APS showed an **increase** in unemployment during the pandemic, which then recovered, with rates by September 2022 having **fallen** to below pre-pandemic levels and to a **record low level**. The percentage of economically active population who were unemployed was **3.0%** for SELEP compared to **3.7%** for England. Unemployment rates for SELEP have been **persistently below** the England average for many years.

The census recorded a **higher** rate of unemployment for March 2021 than the APS, with some people on **full furlough likely recording themselves as unemployed**. Rates across Federated Areas were all **similar** and **below** the national average.

Exceptionally, **Canterbury** recorded the **highest** rates of unemployment within SELEP at the census, with **many full-time students looking and available for work but unable to find it**. The other local authority areas with the **highest** unemployment rates were **Hastings, Thanet, Tendring, Eastbourne and Gravesham**. On a national scale, **low** unemployment rates were present in **Uttlesford, Tonbridge and Malling, Wealden, Sevenoaks and Brentwood**.

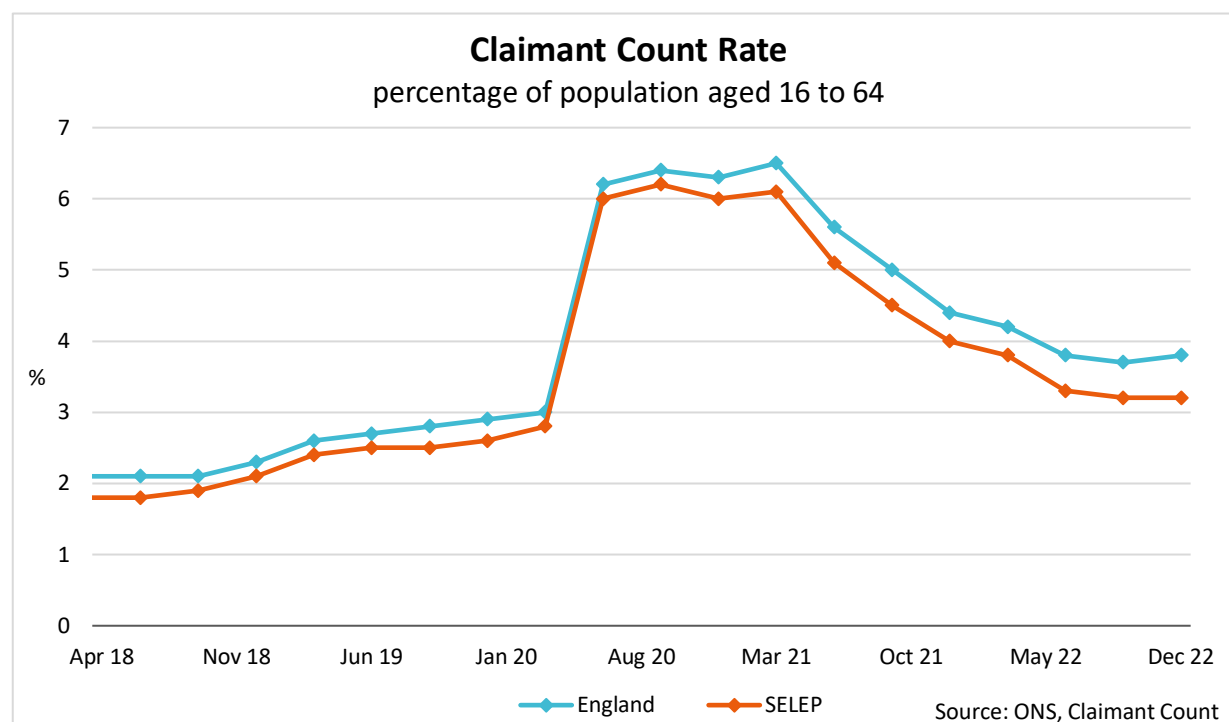


Claimant rate

The claimant rate provides an alternative measure to unemployment with robust results at a local level on a frequent basis. The claimant count includes **those in receipt of benefits who are looking for work** and is **measured on a per head of working age population**. The measure **does not** include those people who are **unemployed** and either not **entitled to**, or **choosing not to**, claim universal credit benefits. The claimant rate therefore adds a dimension of low income to unemployment.

While the claimant rate for England followed a **similar** trend to the unemployment rate in **rising** during the pandemic, it rose to a **greater** extent, from **3.0%** in March 2020 to **6.2%** by June 2020, and while having **fallen** since, has **yet to return to pre-pandemic levels**, standing at 3.8% for England in December 2022.

As with unemployment, the claimant rate for SELEP is **lower** than the national rate and is **lower** than national average in all Federated Areas. However, there is **more variation** at Federated Area level than for unemployment with a **much lower claimant rate** for SE, and with OSE and TES very close to the national average.





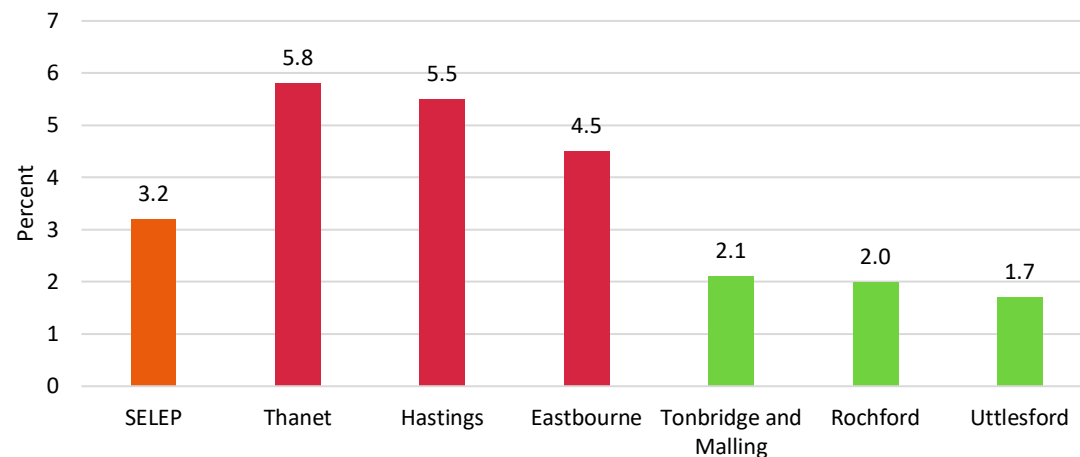
SOUTH EAST LOCAL ENTERPRISE PARTNERSHIP

At a local authority level within SELEP the claimant rate is **highest** in **Thanet** at **5.8%**, with **relatively high** rates also in **Hastings, Eastbourne, Harlow, Southend, Tendring** and **Gravesham**. The local authorities with the **lowest** claimant rates are **Uttlesford, Rochford, Tonbridge and Malling, Sevenoaks** and **Wealden**.

Relative to the pre-pandemic position in December 2019, the local authorities with the **largest increase** in the claimant rate are **Epping Forest, Hastings, Harlow, Eastbourne, Dartford** and **Maidstone**. **Tendring** uniquely now has the **same** claimant rate, with **low increases** in **Ashford, Swale, Dover** and **Folkestone and Hythe**.

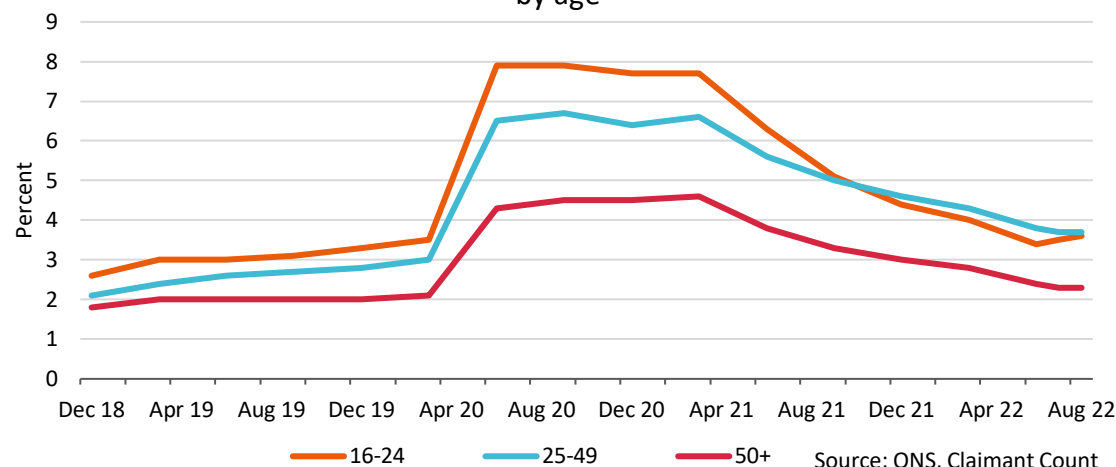
There has been previous concern that the claimant rate was higher for younger people, but this position **changed** in December 2021, and this is **still the case** in the most recent data. In December 2022 the claimant rate for those aged **18 to 24** was **3.6%** compared to **3.7%** for those aged **25 to 49**.

Claimant Rate, December 2022



Source: ONS, Claimant Count

SELEP Claimant Count by age



Source: ONS, Claimant Count



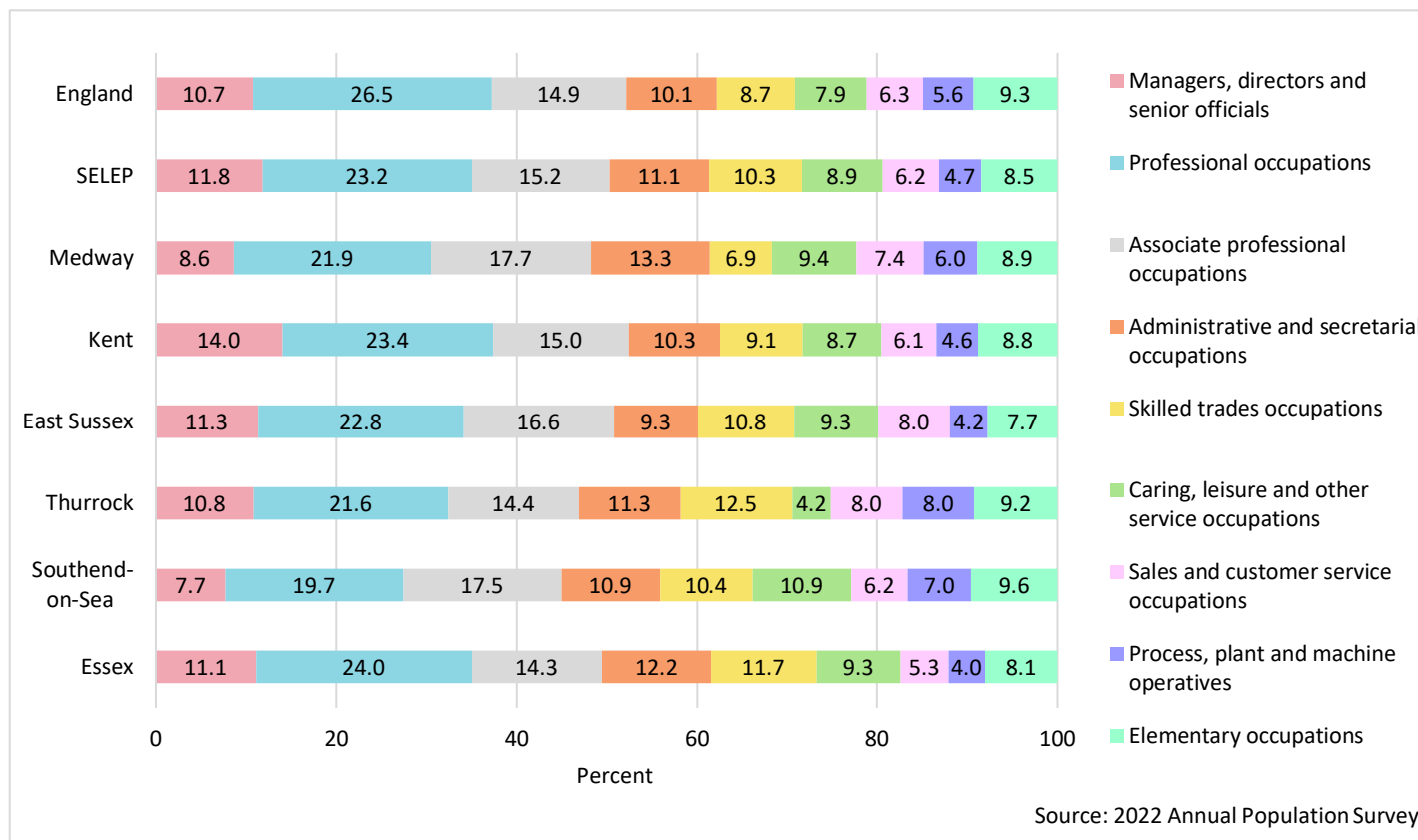
Employment Profile

This chart shows the **composition of employees** in the SELEP region compared to the national composition using data from the 2022 Annual Population Survey.

The **largest discrepancy** between the SELEP region and the national proportions is in the proportion of **Professional occupations**, where SELEP is **3.3% below** the national value.

The other occupation groups where SELEP is below the national proportions are **Process, plant and machine operatives** (0.9% **lower** in SELEP), **Elementary occupations** (0.8% **lower** in SELEP) and **Sales and customer service occupations** (0.1% **lower** in SELEP).

This is offset by SELEP having a **higher** proportion of **Skilled trade occupations** (1.6%), **Managers** (1.1%), **Caring, leisure and other service occupations** (1%), **Administrative and secretarial occupations** (1%) and **Associate professionals** (0.3%).





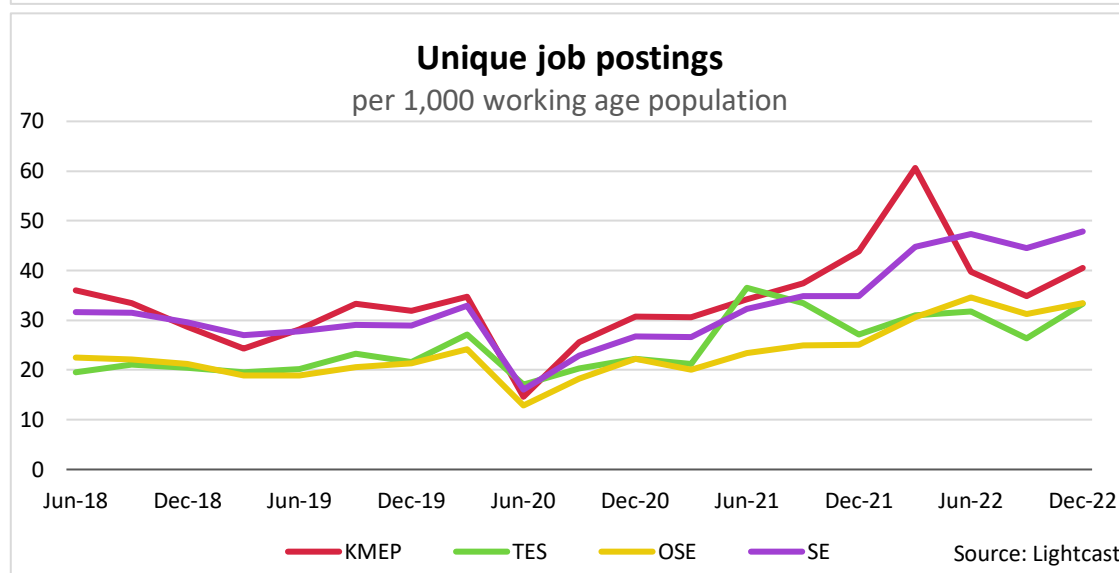
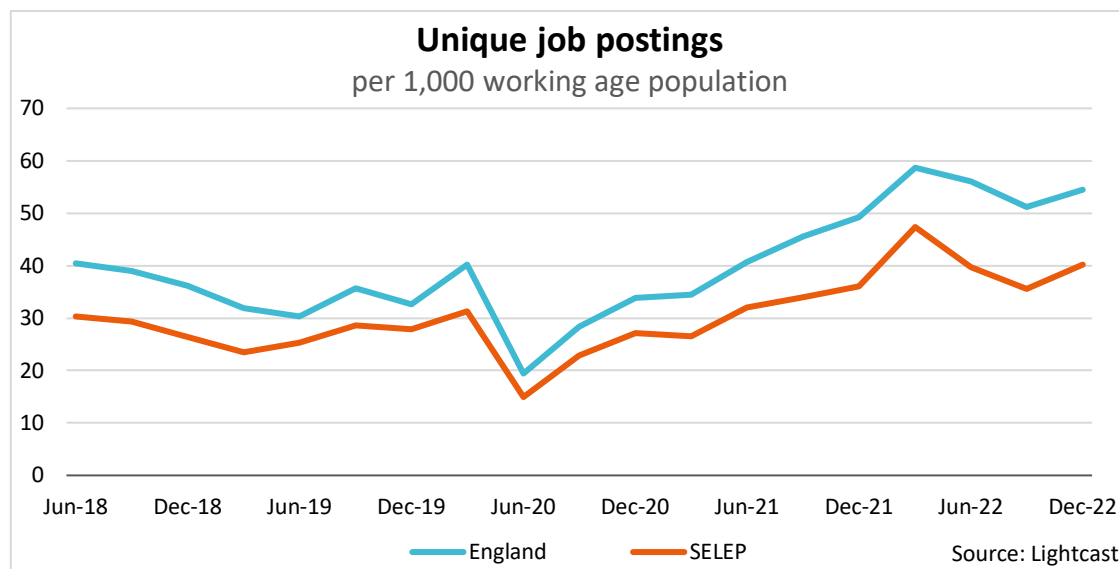
Online job postings

The number of online job postings reached a **record high** in the first quarter of 2022, and while having since **reduced**, remains **significantly above** pre-pandemic levels. In the last quarter of 2022, there were **103,870** new job postings across the SELEP area, which was **40 per 1,000 working age population**. With **lower** job density in SELEP than nationally, the number of job postings is also **below** the national average, which was for **55 postings per 1,000 working age population**.

Across Federated Areas, online job postings per 1,000 working age population were **higher** for **SE** at **48**, with **KMEP** also above the SELEP average at **41**. Job postings were **much lower** in **OSE** and **TES** both at **33**. Previously job postings were at a **similar** level for **SE** and **KMEP**, with **KMEP** frequently having **higher** levels, but for the last three quarters of 2022, numbers were **higher** in **SE**.

At a local authority level, we find that **Chelmsford**, **Maidstone**, **Harlow**, **Colchester** and **Dartford** have the **highest** online job postings relative to the size of the local working age population, all **consistently above** national average over time. **Ashford** and **Tunbridge Wells** have previously been **above** national average, but **not** in the most recent quarter.

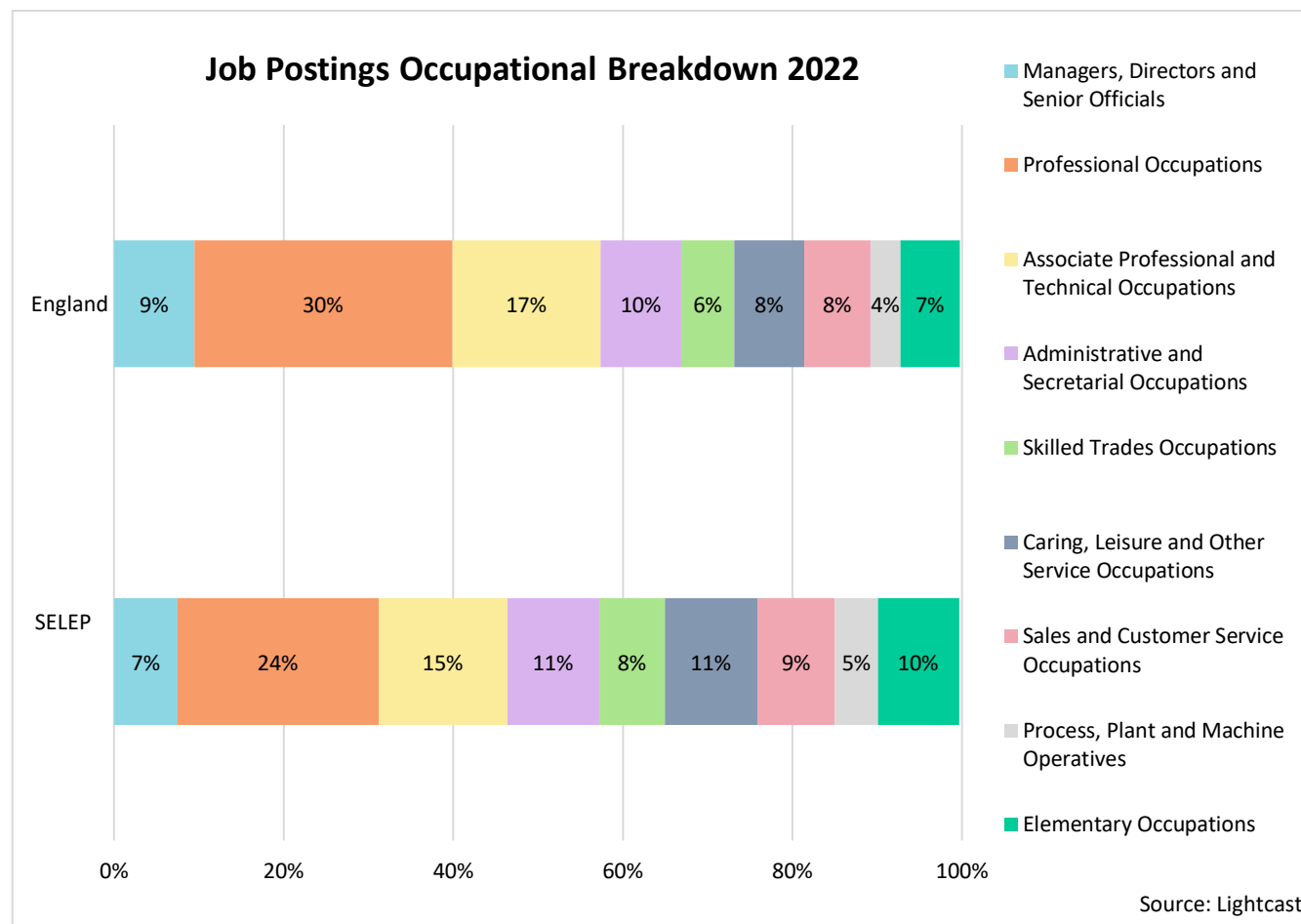
At the other end of scale, some local authorities within SELEP have **very low** levels of online job postings, **below 25 per 1,000 working age population** and in the last quarter of 2022 this included **Swale**, **Folkestone** and **Hythe**, **Gravesham**, **Thanet**, **Maldon**, **Rother**, **Rochford**, **Tendring** and **Castle Point**.



For 2022 the share of online job postings in **higher occupational groups** (directors, professional and technical occupations) was **11% less** than for England as a whole at **46%** of job postings compared to **57%**). SELEP saw a **higher** share of job postings across other occupational groups including **elementary occupations** and **caring and other service occupations**.

The **most in demand** occupations at a slightly more detailed occupational level of breakdown for SELEP in 2022 were **Care workers, Administrative workers, Elementary support services** (e.g. cleaners, stock pickers, and catering assistants), **Associate business professionals** and **Health professionals**.

At the most detailed occupational level the **most in demand** specific job roles were **Care and Home workers, Nurses, Sales related, Administrative related** and **Customer services** job roles. These same roles are **also** the **top roles in demand nationally**, however **Programmers and Software developers** is the **most** in demand job role nationally with this role being **much further down in demand** levels for SELEP, **below** the demand level for Cleaners.

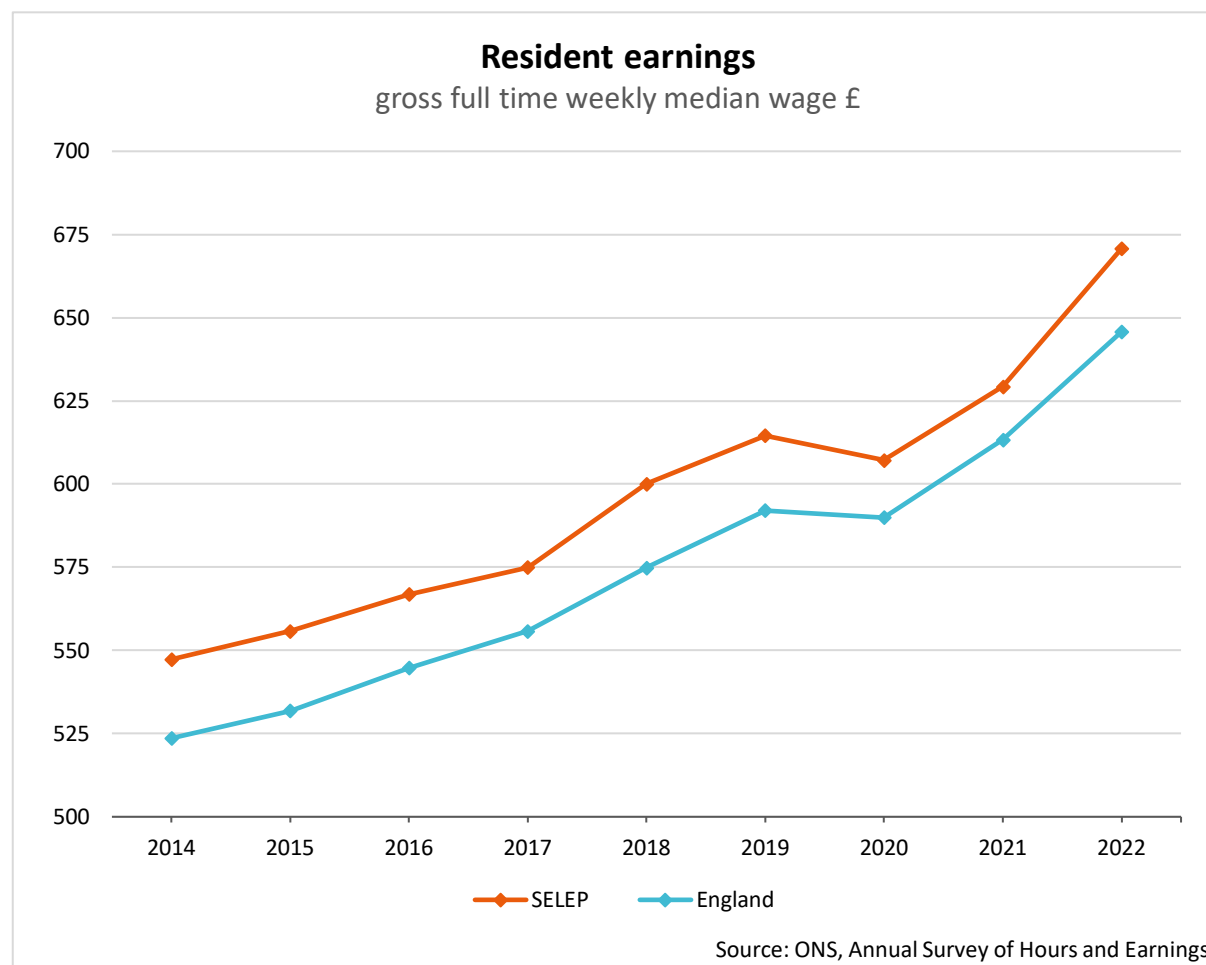


The national Annual Survey of Hours and Earnings (ASHE) provides good estimates of earnings at a LEP level, and the sample size is sufficient to give reasonable indicators of **relative wage levels** at a county level, but **not** at a local authority level.

For 2022 the median full time weekly wage earned by residents in employment across SELEP was estimated to be within the range of **£662 to £680**. This is a **high** wage on a national scale and reflects the **level of commuting into London** for jobs where the equivalent workplace median wage is between **£798 and £811**. Residents in LEP areas **directly north and west of London** earn **more** than in SELEP, with residents in Enterprise M3 and Hertfordshire LEP areas earning levels close to residents in London.

Within SELEP at a county level **Essex** has the highest full time median earnings for residents, estimated to be within the range **£674 to £706**, with **Kent** not far behind at between **£655 and £684**. Both have **lower** wages than **London**, **Hertfordshire**, **Buckinghamshire**, **Oxfordshire** and **Hampshire**. Median full-time earnings in **East Sussex** are **much lower** at between **£598 and £645**, which is **similar** to counties that are removed from London, such as **Cumbria** and **Somerset**.

At a local authority level, comparisons between places are much harder to be clear on, due to the **small sample size** for the ASHE at this level. However, it is clear that median wages for residents are **very low** in **Thanet**, **Harlow** and **Hastings** at around **£600 per week or less**, and weekly wages are **highest** in **Brentwood** and **Epping Forest**, some way in excess of **£700** in 2022.

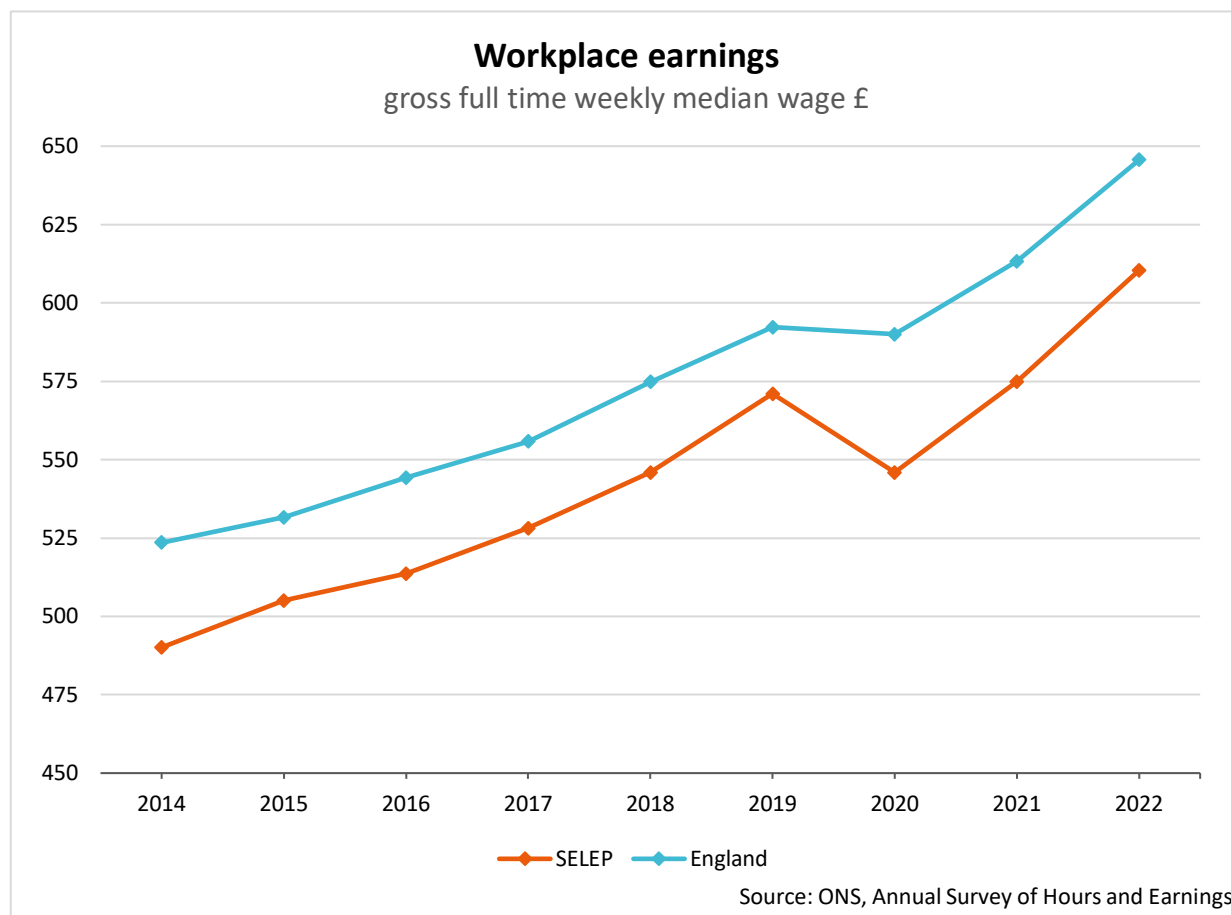




In SELEP on a workplace basis full-time median wages were estimated to be between **£603 and £618** in 2022. This is a **similar** level to median workplace earnings in **Cumbria** and **below** LEP areas in the **Midlands**.

At an English county level, **Essex** has an estimated workplace median wage of between **£605 and £639**, with **Kent** workplace earnings estimated to be somewhere between **£10 and £20 lower** and **similar to Greater Manchester**. **East Sussex** has median earnings **below £600**, more in line with counties such as **Devon and Tyne** and **Wear**. What is clear is the counties in SELEP are very much the **poor neighbours** in terms of workplace earnings compared to London and the counties to the north and west of London as far as the Midlands.

Local authority level data from ASHE is **not reliable enough** to make many firm conclusions in relation to relative wage levels, with estimates for many local authorities having a low precision with a **£100 margin of error**. Median full-time wage estimates are **highest** over time in **Uttlesford, Dartford, Brentwood and Epping Forest**, with **Dartford** median wage having an estimate of between **£662 and £777** for 2022. **Hastings** clearly has the **lowest** local wage at below **£540**, with **Thanet** and **Rother** also having **consistently low** wage estimates over time.





Jobs in knowledge intensive sectors

Knowledge intensive sectors are defined as those which have a **higher** percentage of the workforce with a **level 4 or above qualification** than the all-industry average, with Scientific research and development being the most knowledge intensive sector.

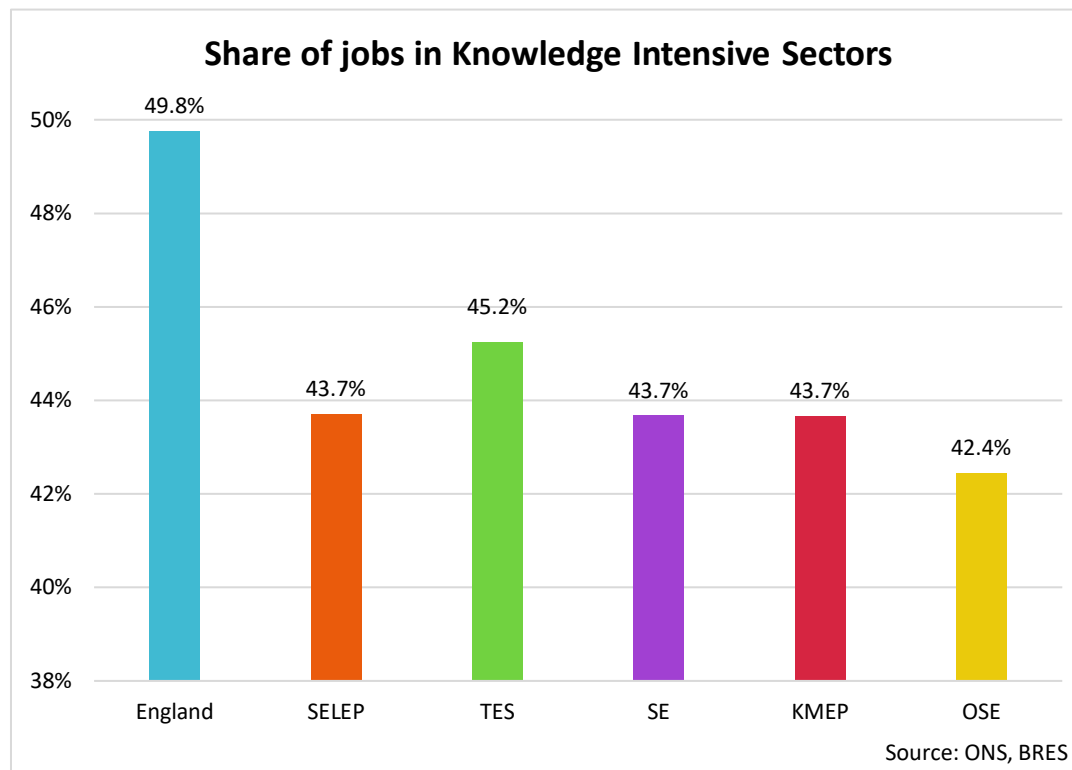
In 2021 **43.7%** of the local workforce were employed in knowledge intensive industries in SELEP, **below** the national average of **49.8%**. The rate is **similar** across all Federated Areas but **varies significantly** at a local authority level.

Only a few local authorities in SELEP have an **above** England average level of jobs in knowledge intensive sectors, and these are **Canterbury, Chelmsford, Tunbridge Wells and Hastings**. Other areas **close** to the national average with a rate **above 48%** are **Colchester, Basildon, Southend-on-Sea and Harlow**.

The local authority areas with **very low** rates on jobs in knowledge intensive sectors, **between 30% and 38%** are **Maldon, Thurrock, Tendring, Dartford, Swale, Uttlesford, Gravesham and Castle Point**.

In the five years to 2021 SELEP saw an **increase** of **16,900** jobs in **knowledge intensive sectors** and an **increase** of **38,600** jobs in **other sectors**. Hence the share of total jobs in knowledge intensive sectors **fell** from **44.4%** to **43.4%**. Meanwhile, there was a **growth** in the share of jobs in knowledge intensive sectors **nationally**. All Federated Areas saw a **decline** with a **larger decrease** in **TES**. **Lewes, Brentwood, Folkestone and Hythe, Maldon and Gravesham** all saw a **3% or more decline**. By contrast **Canterbury, Rochford, Ashford, Tunbridge Wells and Uttlesford** all saw a **2% or more increase** in share of jobs in knowledge intensive sectors.

Knowledge intensive sectors where employee growth has been **slower** in SELEP than seem nationally includes **various professional, financial and information technology services**. SELEP has instead seen **higher** growth than national in other sectors such as **construction, warehousing, and residential care activities**.



Jobs in low pay sectors

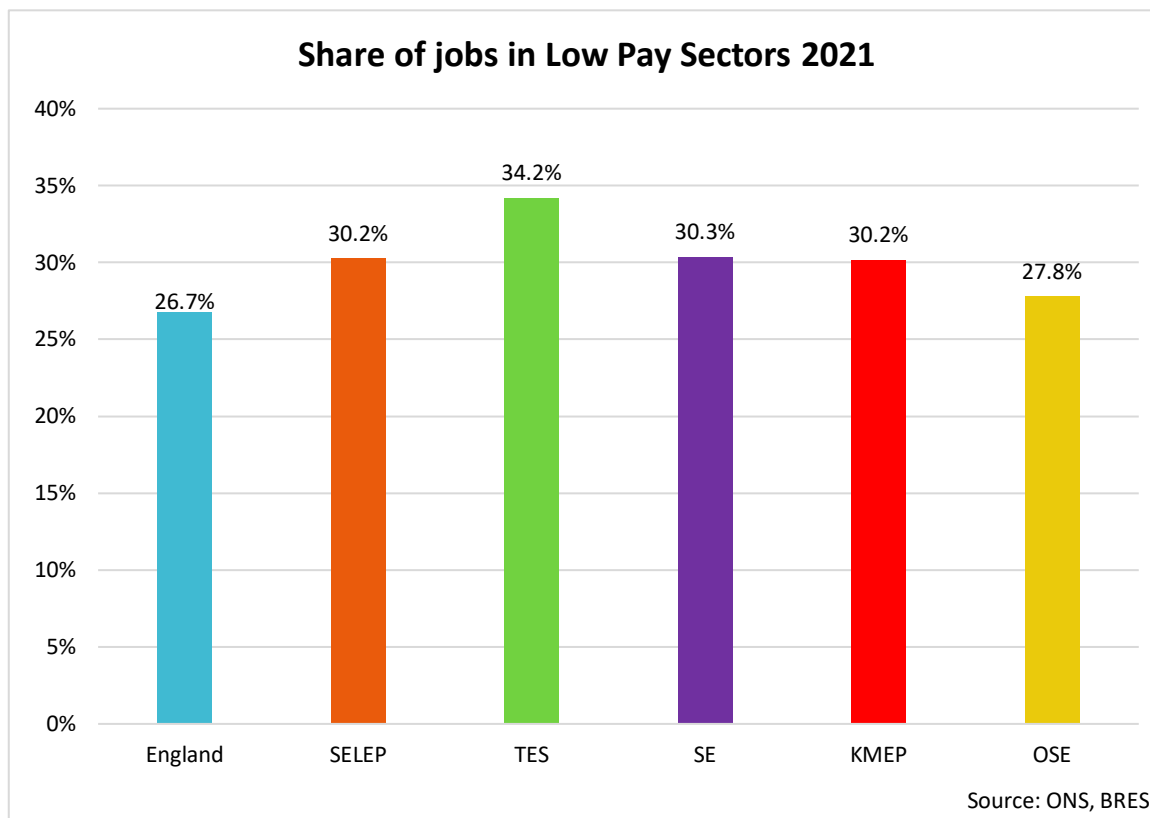
For the purpose of this report, low pay sectors have been defined as those that nationally have a **median wage 20% or more below** the all-industry median wage. Another way of expressing this is as sectors where the **median wage is at most 30% more than the minimum national wage**. Low pay sectors include **retail, food and accommodation, social care activities** and **some areas of manufacturing such as textiles**.

In 2021 the percentage of employee jobs in low paid sectors across SELEP was **30.2%**, **higher** than the national England average of **26.7%**. The rate was **much higher** across **TES** at **34.2%**, and **closer** to the national average at **27.8%** in **OSE**.

In the five years to 2021, for England as a whole the percentage of jobs in low paid sectors **reduced** by **0.6 percentage points**, but **increased** by **0.5** across SELEP, with **OSE** seeing a **reduction** in line with the national trend. In other words, SELEP saw **stronger growth in low pay sector jobs than job growth in other sectors**, which was the **opposite** to the national trend. For SELEP there was **stronger** employment growth in **retail, residential care activities and services to buildings and landscape activities** than was seen nationally, and as identified above, **lower** growth in some knowledge intensive sectors.

In some **coastal and estuarine areas**, the percentage of jobs in low pay sectors is **very high**, being **42.6%** in **Tendring**, and **above 35%** in **Thanet, Castle Point, Rother and Gravesham**. Some local authority areas have **less** jobs than the national average in low pay sectors and these are **Basildon, Rochford, Uttlesford, Harlow and Tunbridge Wells**.

Some areas have seen **very significant falls** in the percentage of jobs in low pay sectors in recent years, with **Harlow, Thurrock, Epping Forest and Rochford** all seeing more than a **2 percentage point reduction**. The local authorities where low pay sector jobs have **increased** the most are **Gravesham, Lewes and Maldon**.



SKILLS





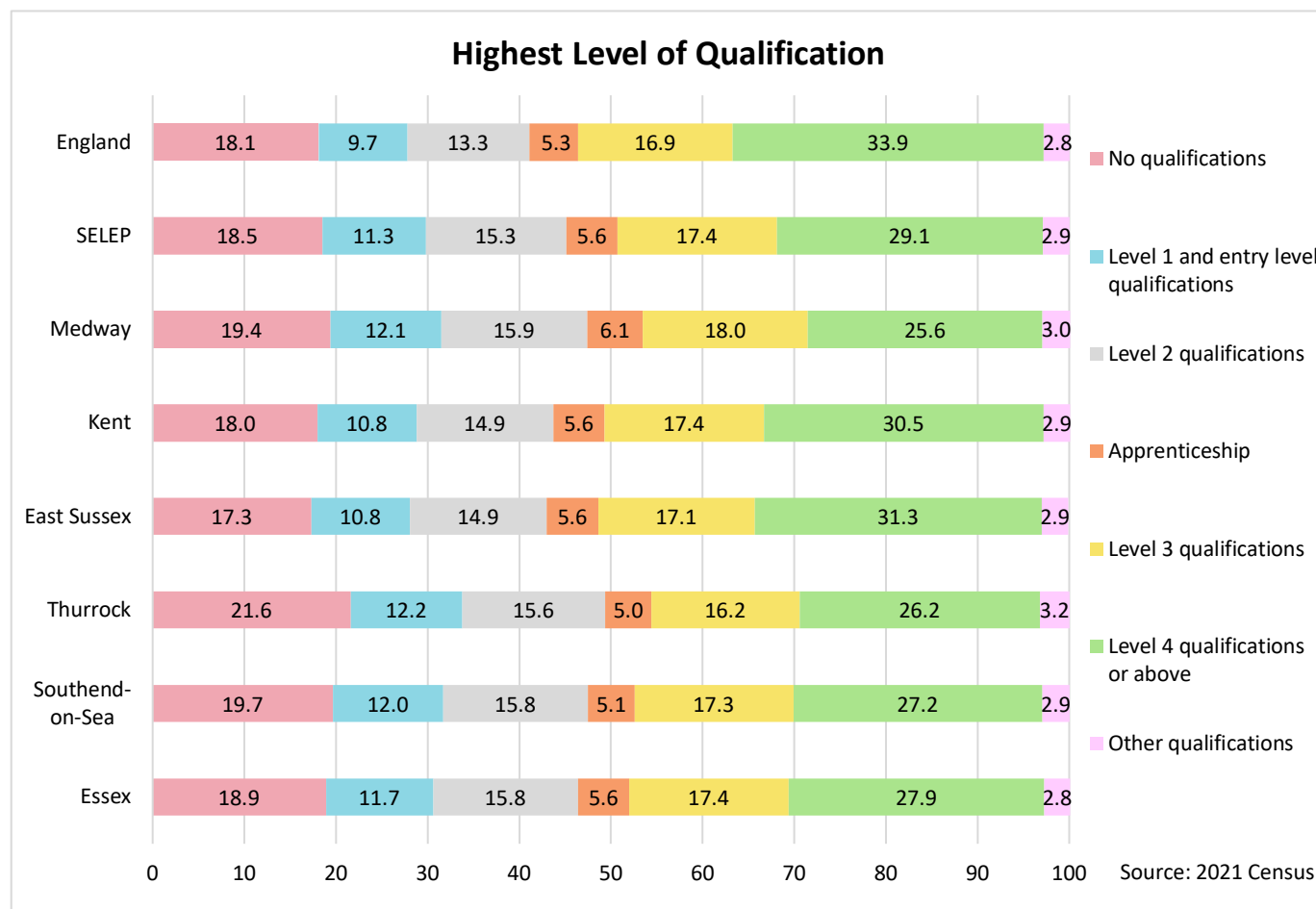
Highest level of qualification

This chart shows the **Highest Level of Qualification** achieved across the region from the 2021 Census. The **largest discrepancy** between the SELEP average and the national average is in the proportion of people **qualified to Level 4 or above** (4.8% **lower** in SELEP). For all other qualification levels, the SELEP region has a **higher** proportion than the national average. This largely remains true when we compare the local authority data to the national average with a **few exceptions**.

East Sussex is the only area with a **lower** proportion of people with **no qualifications** when compared to the national average (0.8% **lower** in East Sussex).

Thurrock and **Southend-on-Sea** both have a **lower** proportion of people with **apprenticeships** as their highest qualification when compared to the national average (0.3% and 0.2% **lower** respectively).

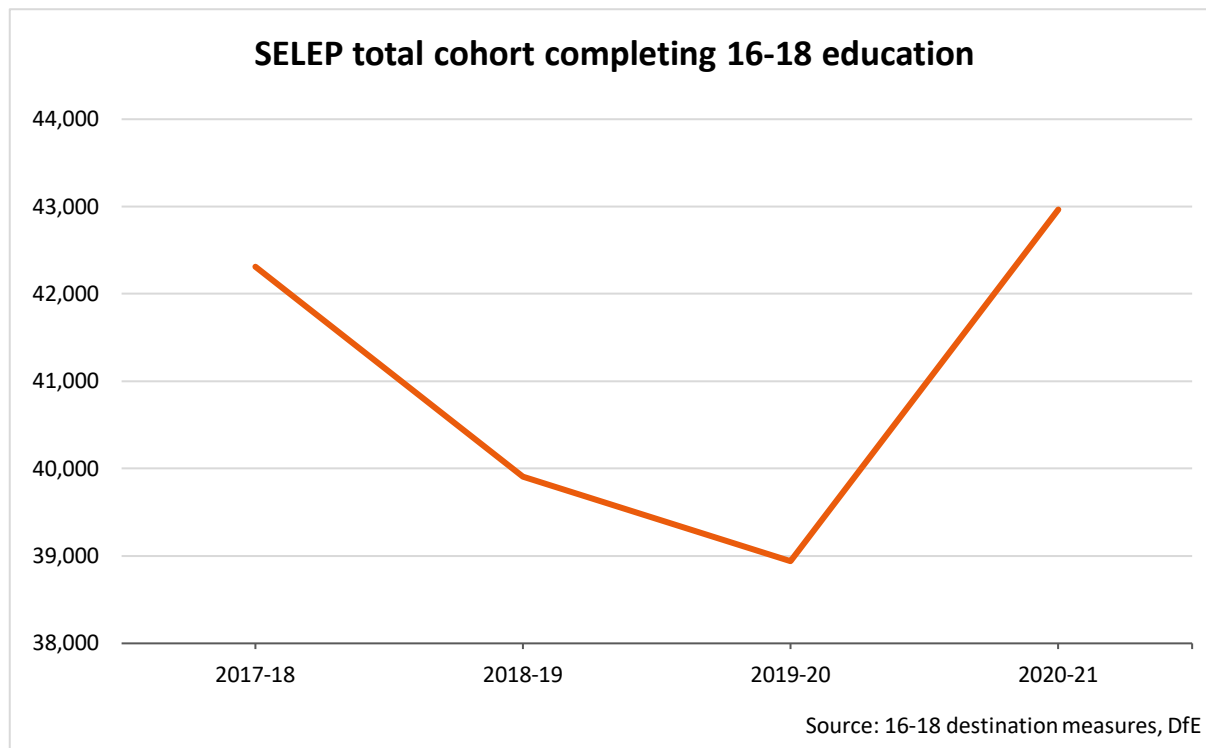
Thurrock is the only area with a **lower** proportion of people with **Level 3 qualifications** as their highest qualification when compared to the national average (0.7% **lower** in Thurrock).





Destinations after completing 16-18 education

The SELEP region saw **42,966** students complete their **16-18 education** in 2020/21, the **highest** number on record. **Southend-on-Sea** saw a **58% increase** on the previous year with **5155** students and **East Sussex** saw a **24% increase** with **5005** students. Conversely, **Essex** (-1%) and **Thurrock** (-7%) saw a **fall**, compared to the cohort of 2019/20.



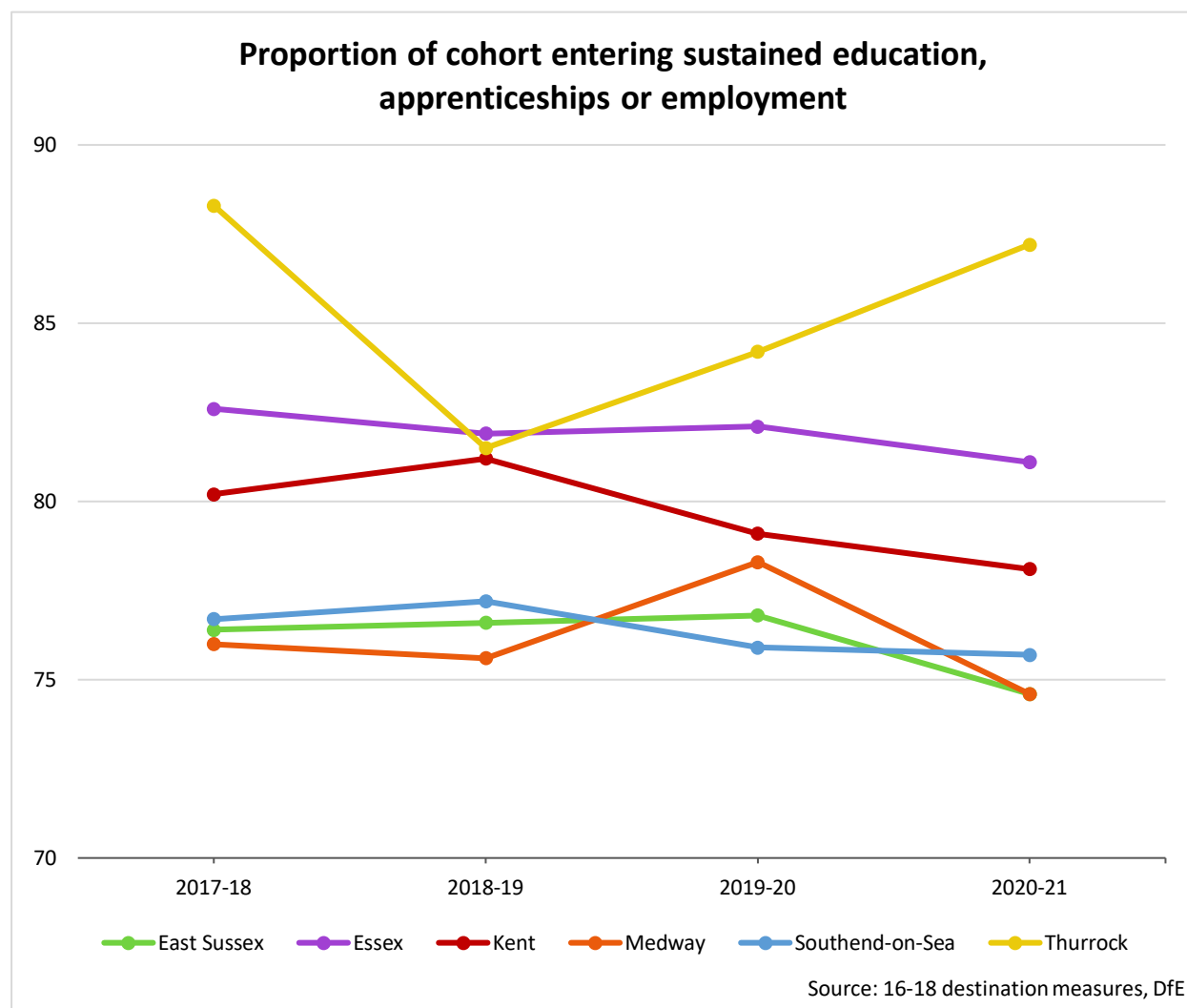
However, the proportion of this cohort entering **sustained education, apprenticeships or employment** has **fallen** to all-time lows throughout the region; apart from **Thurrock**, which has seen an **improvement** on the last two years. In the SELEP region the proportion of the cohort entering one of these destinations was **79.6%** in 2019/20 before **falling** to **78.1%** in 2020/21. In 2020/21 **East Sussex** and **Medway** had the **lowest** proportion of the cohort moving onto one of the three pathways at **74.6%** followed by **Southend-on-Sea** (75.7%), **Kent** (78.1%), **Essex** (81.1%) and **Thurrock** (87.2%).



In 2020/21 the proportion of the cohort continuing down the education pathway (Higher, Further and Other) **rose** to **all-time highs** in East Sussex, Essex, Kent and Thurrock whilst being **near all-time highs** in Southend-on-Sea and Medway. Across the SELEP region the proportion of the cohort continuing education **increased** to **45.6%** in 2020/21 from **42.3%** in 2019/20. Southend-on-Sea has the **lowest** proportion of 16-18 graduates continuing their education at **39.1%**, followed by Medway (**40.7%**), East Sussex (**42.7%**), Kent (**47.7%**), Essex (**47.9%**) and Thurrock (**58.9%**).

In 2020/21 the proportion of the cohort choosing to undergo an apprenticeship **fell** across the region **apart from** in East Sussex, where it saw a slight **increase** from **5.2%** in 2019/20 to **5.4%** in 2020/21. Across the SELEP region the proportion of the cohort starting an Apprenticeship **fell** to **6.4%** in 2020/21 from **8%** in 2019/20. Thurrock had the **lowest** proportion of the cohort starting an apprenticeship (**4.4%**), followed by Kent (**5.1%**), Southend-on-Sea (**6.8%**), Essex (**7.7%**) and Medway (**8%**).

In 2020/21 the proportion of the cohort choosing to enter employment **fell** across all six local authorities in the region. Across the SELEP region the proportion of the cohort entering employment **fell** to **26.1%** in 2020/21 from **29.3%** in 2019/20. Students from Southend-on-Sea were the **most likely** to take this route (**29.8**, followed by East Sussex (**26.5%**), Medway (**26%**), Essex (**25.5%**), Kent (**25.3%**) and Thurrock (**23.9%**).

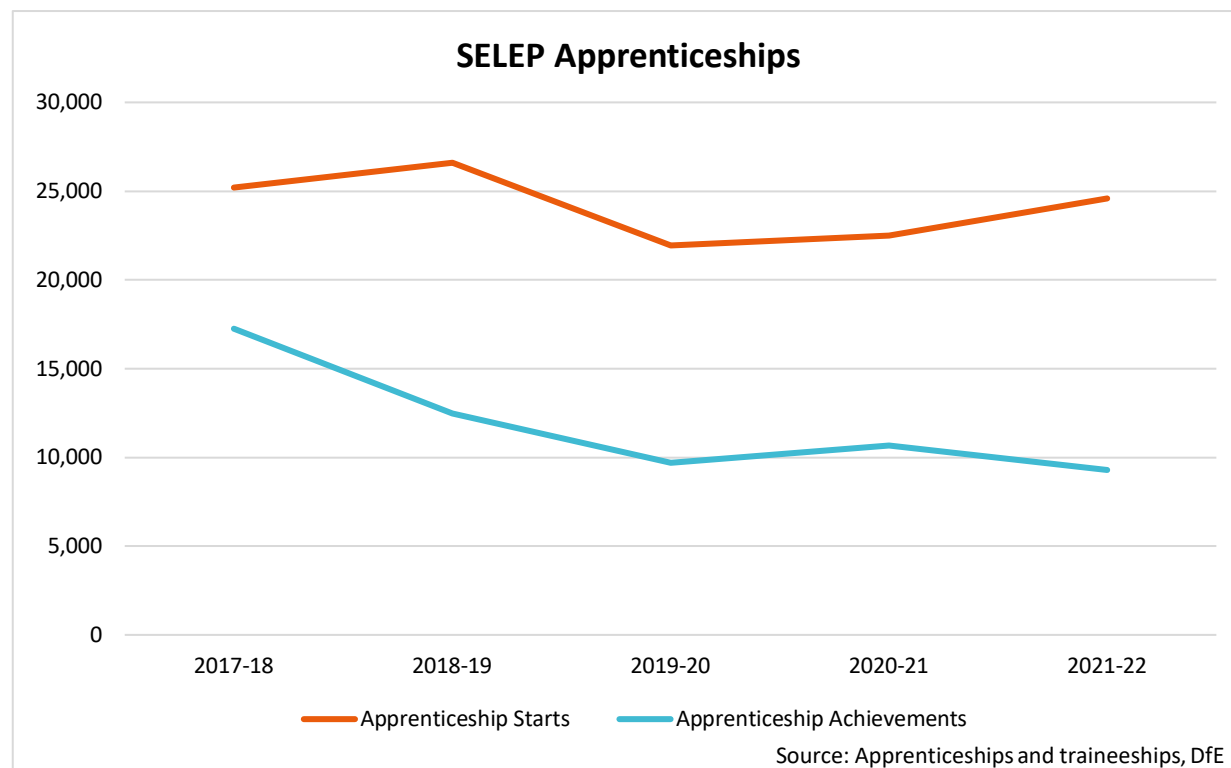




Apprenticeships

Total apprenticeship starts in the SELEP region **increased** to **24,590** in 2021/22 compared to **22,480** in 2020/21. Despite the increase, numbers remain **below** the pre-pandemic amount of **26,600** in 2018/19.

Total apprenticeship achievements in the SELEP region **fell** from **10,670** in 2020/21 to just **9,290** and remain **way below** the **12,460** achievements in 2018/19. We expect numbers to recover following the end of the pandemic and as apprenticeship starts also improve.

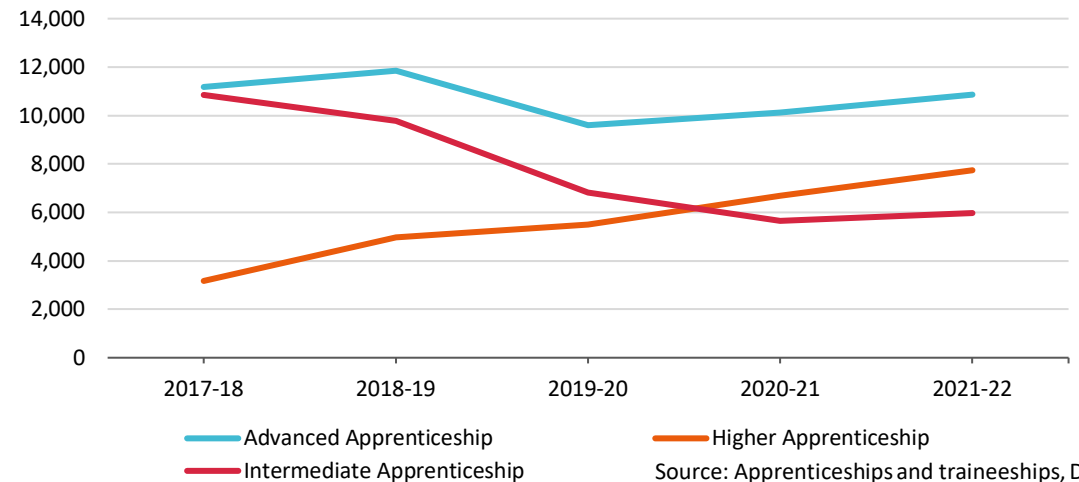




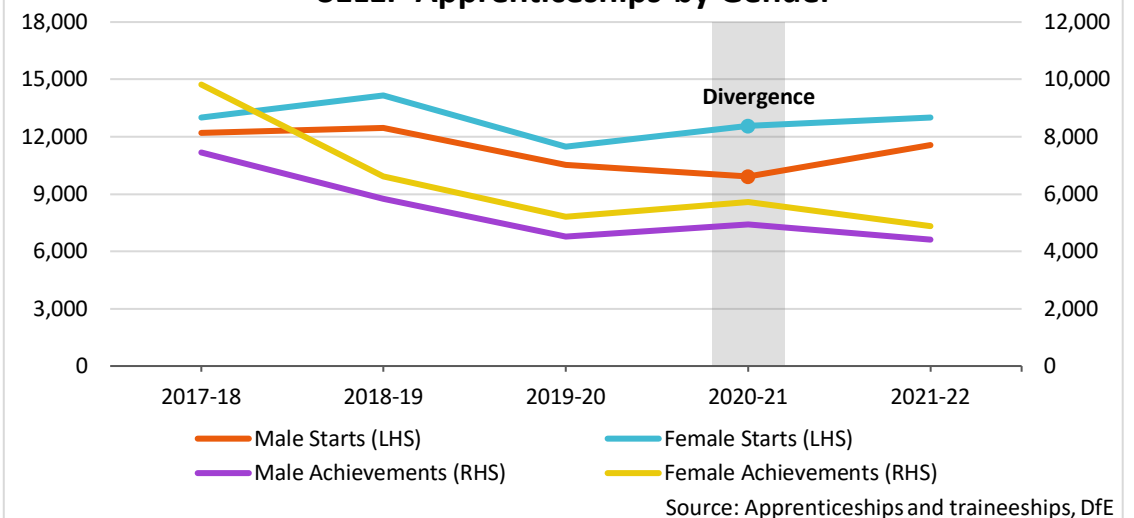
Whilst **Intermediate, Advanced and Higher Apprenticeships** all saw an **increase** in starts in 2021/22 compared to the previous year, Higher Apprenticeship starts (**7,740**) are now **significantly higher** than Intermediate Apprenticeship starts (**5,980**). This is a **stark reversal** of pre-pandemic figures, where there were **9,770** Intermediate starts compared to **4,980** Higher starts in 2018/19.

Male and Female starts and achievements have **moved together** in the last 5 years, with the only **exception** being in 2020/21 when female apprenticeship starts actually **increased**, whilst male apprenticeship starts **decreased**. In 2021/22 female starts (**13,010**) were **1430 higher** than male starts (**11,580**) and female achievements (**4900**) were **500 higher** than male achievements (**4,400**).

Apprenticeship Starts by Level



SELEP Apprenticeships by Gender





In 2021/22 apprentices **over the age of 25** made up **47%** of the total apprenticeship starts, whilst **31%** of starters were between the **age of 19 and 24** and **22%** of starters were **under 19**. The proportion of apprentices between **19 and 24** has **consistently** been around **30%** over the last 5 years. Whereas the proportion of **over 25** apprentices has **increased** from **41%** in 2017/18 and the proportion of **under 19** apprentices has **fallen** from **29%** in 2017/18.

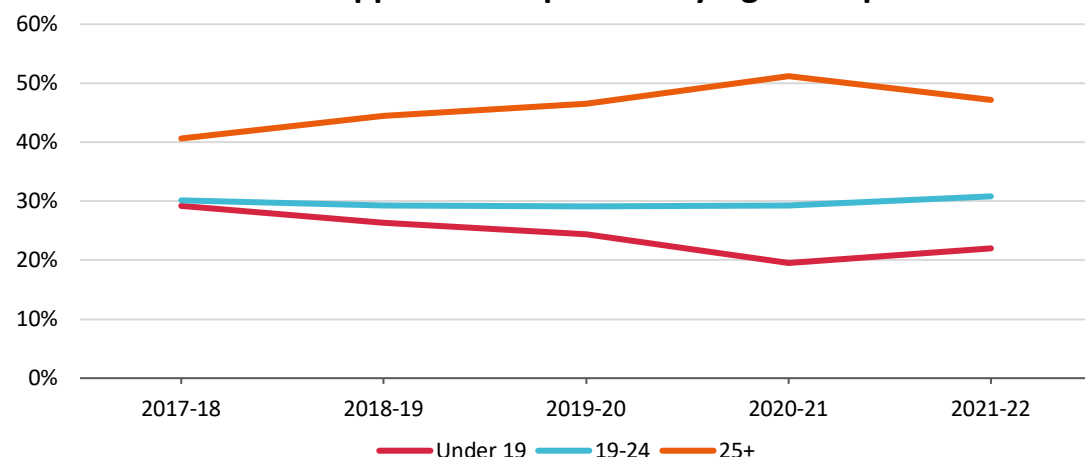
Health, Public Services and Care and **Business, Administration and Law** continue to be the two **largest** Subject Sector Areas in 2021/22 with **30%** of starts being in the former and **27%** in the latter. **Health, Public Services and Care** saw a **nominal increase** of **300** starts on the previous year, however its share of all apprenticeship starts **fell** **1.5%**. **Business, Administration and Law** starts **fell** by **80** students, leading to a **3% fall** in its share of apprenticeship starts.

Engineering and Manufacturing Technologies remains the region's third most popular subject area with starts **increasing** by **600** in 2021/22 on the previous year – the subject area now accounts for **14%** of total starts.

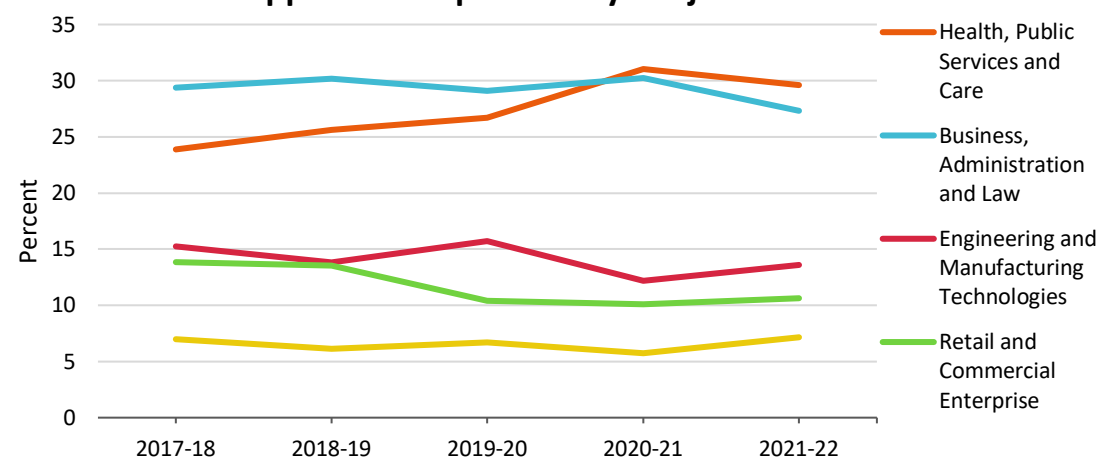
Starts in **Retail and Commercial Enterprise** Apprenticeships have **rebounded, up 15%** on the past two years. However, starts in the subject sector area are still **980 less** than the pre-pandemic figures in 2018/19.

Construction, Planning and the Built Environment saw apprenticeship starts **rise** by **36%** from **1290** in 2020/21 to **1760** in 2021/22, the subject area now makes up **7%** of total starts.

SELEP Apprenticeship Starts by Age Group



SELEP Apprenticeship Starts by Subject Area



Source: Apprenticeships and traineeships, DfE

Higher Education Progression Rate

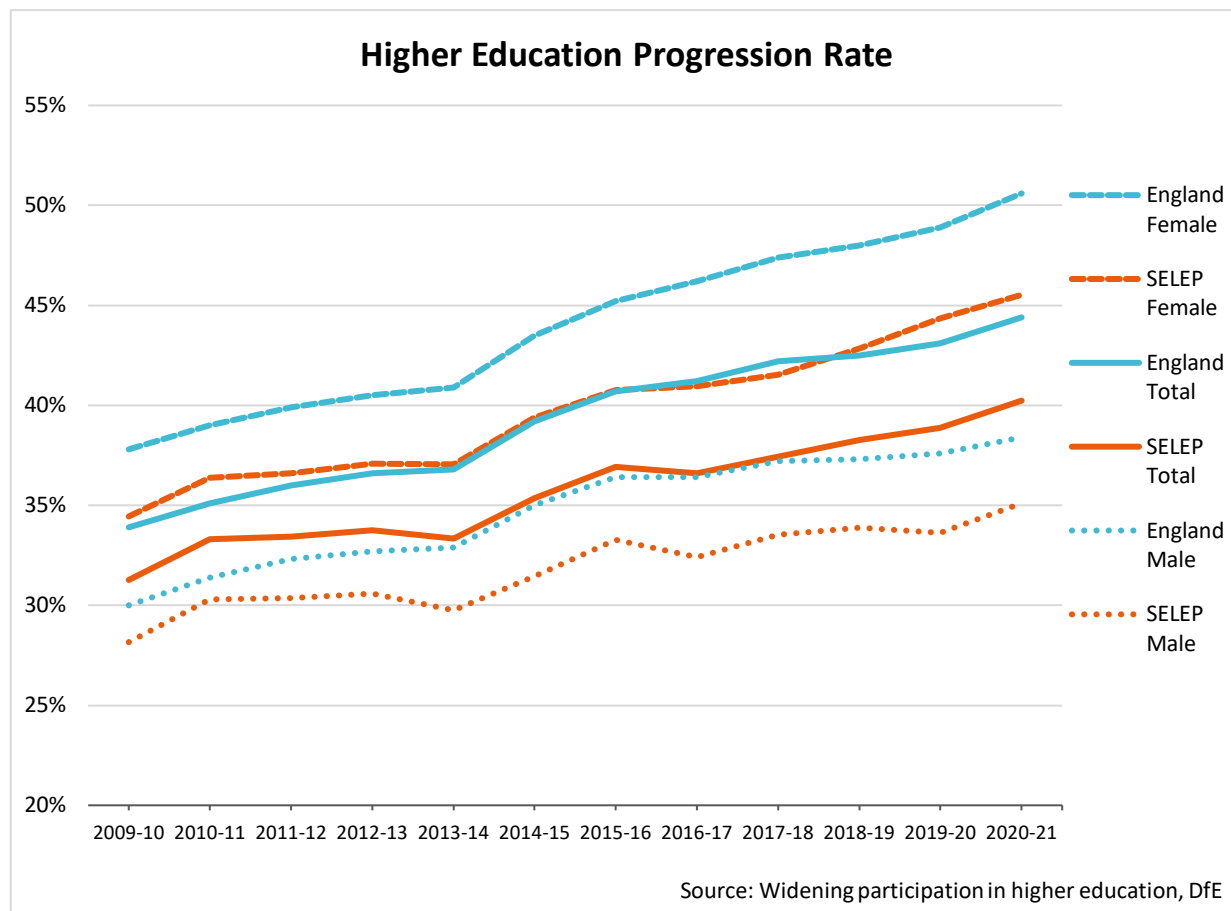
The following insights are from the Widening Participation in Higher Education publication from the Department of Education and contain data as recent as 2020/21.

The national **Higher Education Progression Rate** has **increased** every year for **both males and females** since the start of the data in 2009/10. The **SELEP Higher Education Progression Rate** has also **increased** every year since 2009/10 **apart from** the male progression rate in 2019/20.

The national HE progression rate was **2.6% higher** than the SELEP HE progression rate in 2009/10, with the difference between the two **peaking** in 2017/18 when the national rate was **4.8% higher** than the SELEP rate. The discrepancy has **come down slightly** and was **4.2%** in 2020/21 (SELEP rate **40.2%**; National rate **44.4%**).

In 2020/21 the national female progression rate was **12.2% higher** than the national male progression rate, a **larger difference** than in the SELEP region, where the female progression rate was **10.4% higher** than the male progression rate. The national difference has **widened** since 2012/13, whereas the SELEP difference **peaked** in 2019/20 (**10.7%**).

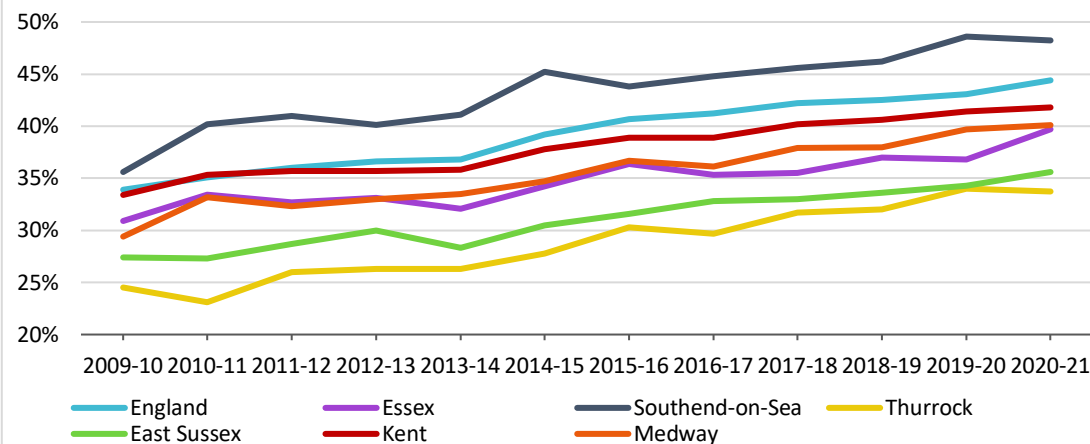
In 2020/21 the national female progression rate was **5.1% higher** than the SELEP female progression rate (National **50.6%**; SELEP **45.5%**), whilst the national male progression rate was **3.3% higher** than the SELEP male progression rate (National **38.4%**; SELEP **35.1%**).





At a local authority level, **Southend-on-Sea** was the only area with a **higher** progression rate than the national rate (**48.2%** in 2020/21 compared to **44.4%** nationally). **Thurrock** had the **lowest** progression rate in the region in 2020/21 at **33.7%** followed by **East Sussex** (**35.6%**), **Essex** (**39.7%**), **Medway** (**40.1%**) and **Kent** (**40.8%**).

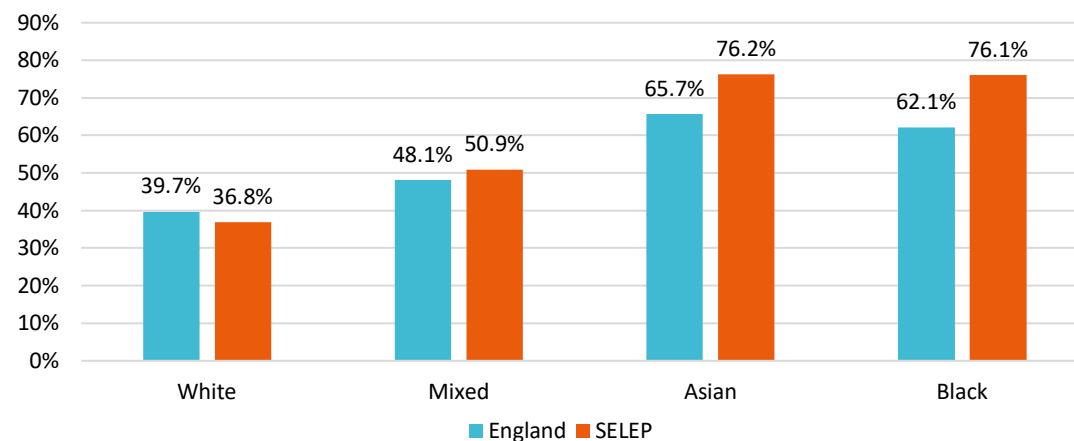
Higher Education Progression Rate by Local Authority



Source: Widening participation in higher education, DfE

When looking at ethnicity it is important to understand that **87.6%** of the cohort in 2020/21 considered themselves to be **white**. The progression rate for **white** students in the SELEP region was **36.8%** in 2020/21, **2.9% lower** than the national rate for white students. **Mixed** students made up the **second largest** proportion of the cohort (**4%**) and had a progression rate of **50.9%**, **2.8% higher** than the national average for mixed students. **Asian** students comprised of the **third largest** portion of the cohort (**3.1%**) and had a progression rate of **76.2%**, **10.5% higher** than the national average for Asian students. **Black** students were the **fourth largest** ethnicity in the SELEP cohort (**3.1%**) and had a progression rate of **76.1%**, **14% higher** than the national average for Black students.

Higher Education Progression Rate by Ethnicity 2020/21



Source: Widening participation in higher education, DfE



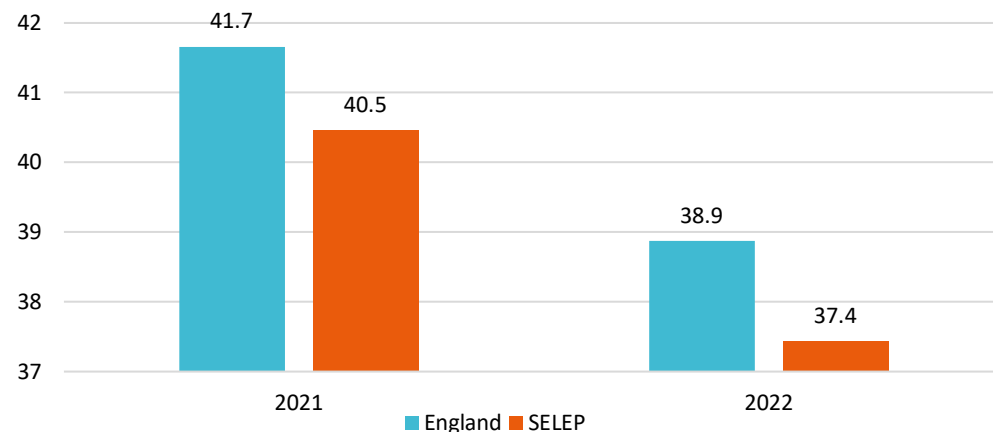
A level and other 16 to 18 results

The national Average Point Score (APS) per A level entry **fell** in 2021/22 to **38.9** (from **41.7** in 2020/21). This pattern **also** occurred across the SELEP region with the APS **falling** from **40.5** in 2020/21 to **37.4** in 2021/22, as Ofqual stated that 2021/22 was to be a **transitional year** with the aim of having results lie in between those of 2020/21 (Teacher Assessed Grades) and 2018/19 (still Centre Assessed Grades).

The APS across SELEP **varies dramatically** with Southend-on-Sea at **41.1** and Medway at **35.6** in 2021/22. The other local authorities had APS per entry between these extremes; East Sussex (36.3), Thurrock (36.7), Essex (37.2) and Kent (37.6). The South East region has historically had the **highest** APS of any region, however Medway and East Sussex only outperform Southampton, Isle of Wight, Milton Keynes and Portsmouth and are **dwarfed** by the best performing local authorities in the region: Buckinghamshire, Reading, Brighton and Hove and Surrey who all have APS of over 40. Southend-on-Sea **tops** the East of England region and Essex and Thurrock sit in the **middle** of the pack.

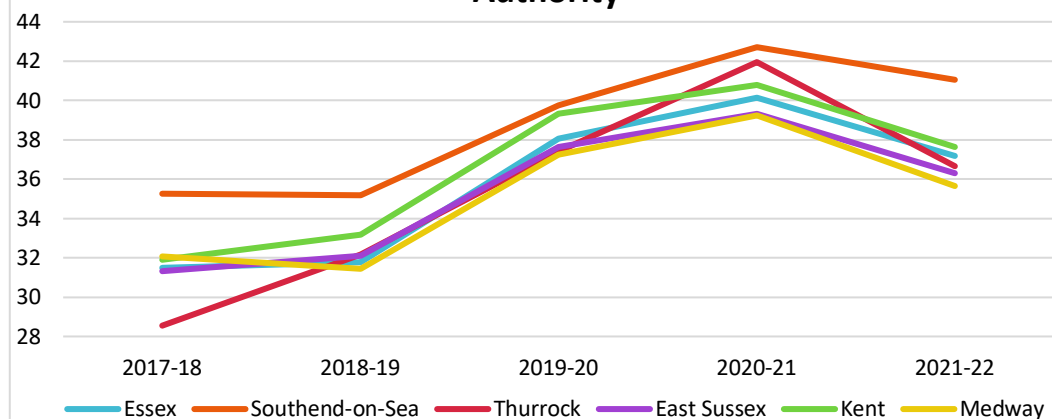
The national APS per general qualification entry **fell** from **32.7** in 2020/21 to **32.0** in 2021/22. Historically the South East and East of England have had the **worst** APS scores and **continue** to show this in the 2021/22, although London has fallen into this lower end too. Thurrock had the **best** APS per general qualification entry in the SELEP region at **38** points, this was also the **highest** score in the East of England region. However, Essex (30.3) and Southend-on-Sea (27.2) had much poorer general qualification APS, with Southend-on-Sea being the **worst** performing local authority in the East of England and the **fourth worst** in the whole country. Medway (28.2), East Sussex (31) and Kent (31.4) all had **below** the national average APS. Medway was the **worst** performing local authority in the South East region; Kent and East Sussex were amongst the **middle** performers.

Average Point Score per A level entry



Source: A level and other 16 to 18 results, DfE

Average Point Score per A level entry by Local Authority



Source: A level and other 16 to 18 results, DfE

SECTORS



Sectors - Size and growth

Employment data from the Business Register and Employment Survey provides **employment counts** for Standard Industrial Classification (SIC) Codes used to define various sectors in the economy. SIC codes are provided as a hierarchy, allowing either broad sector analysis (as provided in previous sections) or **more detailed analysis as provided here**. SIC codes at the 2-digit level break the economy down into 84 sectors, which is sufficient for most analysis.

Over the last five years SELEP has seen the **largest** growth and **above** national growth within **Manufacture of clothing, textiles and leather products, Manufacture of beverages, Warehousing and support for activities for transportation, Film and TV production, Specialised Construction activities and Civil Engineering**. Manufacture of beverages, Film and TV production and Warehousing have also seen **strong** national growth, but with growth of employment in SELEP having been **higher**.

SELEP has had **lower** growth than national for other sectors where there has been strong national growth, including **Information Service activities, Legal and accounting activities, Construction of buildings and Activities auxiliary to financial services**.

The **largest** sectors in employment terms for SELEP at a 2-digit SIC code level are shown in the table below.

Sector	Employment numbers (2021)
Retail trade	177,000
Education	156,000
Human Health	136,000
Food and beverage serving activities	107,000
Specialised construction activities	74,000
Public Administration and defence	64,000
Wholesale trade	60,000
Services to buildings and landscape activities	54,000
Residential care activities	53,000
Warehousing and support activities for transportation	51,000

The sectors with the **largest contraction** over the last five years within SELEP have been **Manufacture of basic metals, Manufacture of motor vehicles, Publishing, Printing, Manufacture of pharmaceuticals, Manufacture of Wood products, Manufacture of electrical equipment and Insurance activities**. Decline has also been seen nationally in **most** of these sectors, but to a **lesser degree** than in SELEP and with national **growth** in Pharmaceuticals and Insurance. Sectors with a **high degree** of national contraction where SELEP has had **growth** or **lower contraction** include **Accommodation, Civil Engineering and Manufacture of other transport equipment**.

Sector Specialisation

Sector specialisation for geographic areas is usually assessed using **Location Quotients (LQ)** for employment numbers. A LQ is calculated as the share of employment in the sector in the local area, relative to the share of employment nationally for the same sector. A value of **above 1** implies **relative specialisation** compared to the national average. Analysis for LQs at a 2-digit SIC code for SELEP has been completed for this section to provide some insight into relative sector specialisms across the LEP area.

The **highest** LQs are for **water related industries**, which given the **extensive coastline** for the area is perhaps no surprise. “**Water collection, treatment and supply**”, “**Fishing and aquaculture**” and “**Water Transport**” are the three sectors where SELEP has the **highest** Location Quotients between **1.9 and 2.0**, so employment share in these industries in SELEP is about **twice as high** as the national average. However, these are **relatively small** industries and employ just **0.4%** of the total workforce in SELEP. These are also industries which tend to be **highly specialised** in a few places. For example, only eight LEP areas have a specialism in Water Transport with four having a higher LQ than SELEP, with Solent at a sizable 14.1, and therefore the main centre for the Water Transport sector in the country.

Other sectors where SELEP has an overall **high relative specialism**, with an LQ of **1.5** or above are “**Crop and Animal Production**”, “**Specialised Construction activities**”, “**Manufacture of computers, electronic and optical products**”, “**Waste Management services**”, and “**Manufacture of paper and paper products**”.

The list for other specialisms with LQs **above 1.1 and up to 1.5** gets longer and includes some related activities. “**Warehousing and support activities for transportation**” has an LQ of 1.4, but there is also specialism in **postal and courier activities**. We see a continued theme for the **construction sector** with specialisms for both **civil engineering** and **construction of buildings**. **Electronic manufacture with specialism in manufacture of electrical equipment**, and **specialism in waste collection and disposal activities** continues the specialism in this area. Another area of specialism is for **Residential care activities**.

Sectors where SELEP has **very low** shares of employment relative to the national average, and therefore a **low** LQ of **0.5 or less** includes sectors such as “**Programming and Broadcasting activities**”, “**Manufacture of basic pharmaceutical products**”, “**Information Service Activities**”, “**Manufacture of motor vehicles**” and “**Manufacture of other transport activities**”, “**Financial Services**”, “**Motion Picture, video and television programme production**”, and “**Manufacture of food products**”.

Of course, although SELEP as a whole may not have specialisms in certain sectors, a review of information at a more local level can identify where there are **clusters** of specialisms at a local authority level. A full analysis of local sector clusters is beyond the scope of this report, but some examples of interest are shown in the table below.

Sector	Local authorities with strong specialism (LQ > 3)
Manufacture of beverages	Lewes, Swale, Maldon
Manufacture of coke and refined petroleum products	Gravesham, Tendring
Manufacture of basic pharmaceutical products and pharmaceutical preparations	Swale
Manufacture of motor vehicles	Brentwood
Manufacture of other transport equipment	Rochford
Air Transport	Uttlesford, Rochford
Publishing	Harlow
Insurance, reinsurance and pension funding,	Tunbridge Wells
Scientific research and development	Dover, Uttlesford, Harlow
Creative, arts and entertainment activities	Lewes

Focus on Sectors

There is particular interest in certain sectors with stakeholders, either due to some **strengths in the sector in some localities**, or due to acknowledgement that these sectors are likely to be **important for future growth**. In this section a selection of sectors of interest are explored in more detail.

Some of these sectors of interest, particularly for **new and emerging sectors** are **not well captured** by the **Standard Industrial Classification (SIC) system**. For example, there is not a SIC code for **AgriTech**, and businesses connected with this sector may be within **Agriculture, Manufacturing or Professional Services**.

Various attempts are now being made on various fronts, from academics to private sector businesses to make use of new data methods to help identify businesses engaged in sectors or activities which are not well represented within SIC codes. For this report we have made use of the “**The Data City**” product which uses **web-site text of businesses** and **machine learning techniques** to classify businesses into **RTICs (Real Time Industrial Classifications)** which cover a wide range of **emerging sectors** and **non-traditional sectors** not well captured by SIC codes.

The Data City are a trusted provider and platform, with clients including the government **Department for Business, Energy & Industrial Strategy (BEIS)**, **Greater Manchester Combined Authority (GMCA)**, **West Yorkshire Combined Authority**, **North East LEP**, **Midlands Engine**, **Belfast City Council** and **Cumbria Council** amongst others.

Note that analysis through RTICs is an **emerging method** and results should **not** be regarded as definitive, but rather as a **great improvement** to get some information in relation to emerging sectors, which would **otherwise not be available**.

Life Sciences

All eyes were on the Life Sciences sector during the pandemic and interest has sustained since. As an **innovative sector** that relies on **cutting edge science and technology**, it is a logical first sector to investigate. Unsurprisingly, the sector sees **massive amounts** of R&D investment every year, with **£46.4 billion investment funding** and **£2.2 billion Innovate UK grant funding** over the last 10 years. In 2021 alone, **£14.4 billion of investment funding** was given to the sector, with a sizable **£6 billion** in 2022, demonstrating the continuing importance of the sector. There is such a **widespread presence** within SELEP that local authorities with strong clusters such as **Dover** and **Harlow**, do not even appear in the top 20 SELEP local authorities ranked by business count. Total SELEP investment **rose sharply** in 2022 to **£450 million** compared to only **£87 million** in 2021, a **stark contrast** to the national trend.

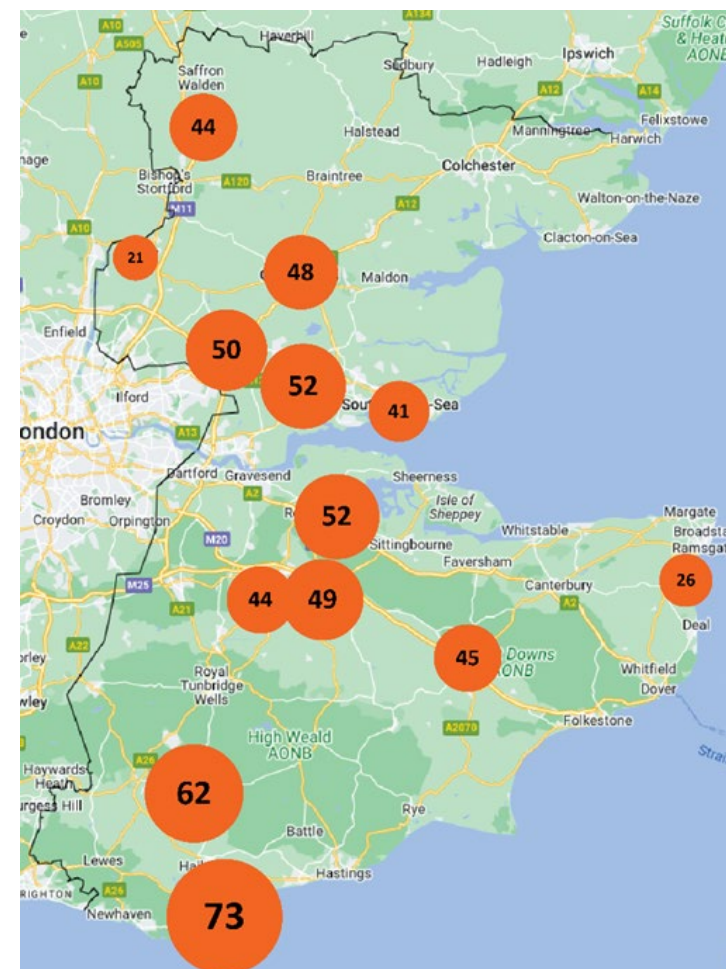
Data city defines this RTIC sector as those companies involved in **Biology and BioTech, Chemical products and services, Environmental Sciences Products and Services, Human Health Services, Life Sciences Manufacturing, Research and Synthetic Biotechnology**. Analysis identified **1,101** companies in this RTIC sector in the SELEP region.

Of the total number of companies identified in this sector, most (**30%**) are classified at Companies House as being within the **Human Health and Social Work** SIC sector, **22%** fall under **Professional, Scientific and Technical** activities, **9%** fall under **administrative and support services** and **8%** fall under **Manufacturing**.

At a more detailed SIC level, the companies identified are **strongly present** in fields such as **Dental Practice** activities, **Other Human health** activities, **Management consultancy** activities other than financial management, **Other business support service** activities not elsewhere classified and **General medical practice** activities.

Business count by local authority

Source: The Data City, Google Maps

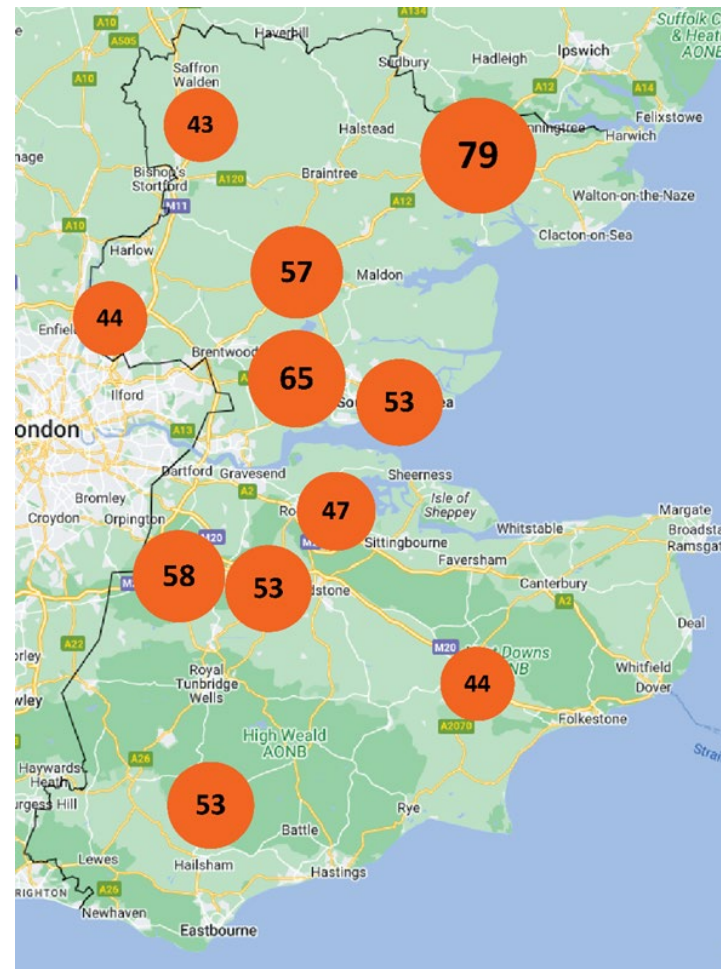


Of the businesses identified within the SELEP region, **all 32 local authorities were present** within the RTIC sector. **Eastbourne** was the **most common** location with **73** companies, and **Wealden** was the **second** most common with **62** companies. **Medway, Basildon, Brentwood** and **Wealden** all had **over 50 companies**. **Rother** had the fewest companies at 14 and **Hastings, Gravesham, Castle Point, Rochford, Tendring** and **Maldon** all had **20 or fewer** companies.

At a national level, The Data City estimates **21,568** companies with **920,341** employees and a total turnover of **£216.7 billion**. They also estimate a **+5.6% company growth rate per year**. Please note that these high-level summary figures are likely to be overestimates due to the methodology of their analysis.

Business count by local authority

At a more detailed SIC level, the companies identified are **strongly present** in fields such as **Other business support service activities not elsewhere classified**, **Collection of non-hazardous waste**, **Electrical Installation**, **Plumbing**, **heat and air conditioning installation**, **Management consultancy activities other than financial management** and **Other specialised construction activities not elsewhere classified**.





Of the businesses identified within the SELEP region, **all 32 local authorities were present** within the RTIC sector. **Colchester** was the **most common** location with **79** companies. **Basildon, Sevenoaks, Southend-on-Sea, Chelmsford, Wealden and Tonbridge and Malling** all had **over 50** companies. **Folkestone and Hythe** had the **fewest** companies at **5**, an outlier as the other local authorities had **more than 10** Net Zero businesses. **Rochford, Maldon, Gravesham, Hastings, Castle Point and Thanet** had between **12-15** businesses within the RTIC sector.

At a national level, The Data City estimates **19,041** companies with **693,395** employees and a total turnover of **£595 billion**. They also estimate a **+4.8%** company growth rate per year. Please note that these high-level summary figures are likely to be overestimates due to the methodology of their analysis.

Digital Creative Industries

As technology continues to improve every day, the potential in this sector can only grow. However, for such a **large** and **varied** sector, **national R&D investment** remains **relatively low**, with only **£2.5 billion investment funding** in the last 5 years, including a **very low £42 million** in 2022. **Innovate UK funding** is also **very low** nationally at **£16 million** in the last 5 years. Within SELEP we have been looking to encourage growth within this sector through the **South East Creative Economy Network**, an **open network** that has worked on **identifying barriers to growth** and **delivering solutions**. There is a **widespread presence** in this sector across the region.

Data City defines this sector as those companies using **new technologies in creative markets** such as **advertising, film, and music**, which identifies a **very broad range** of companies working within **marketing and design**, to those using **technology within architecture** and **performing arts organisations**.

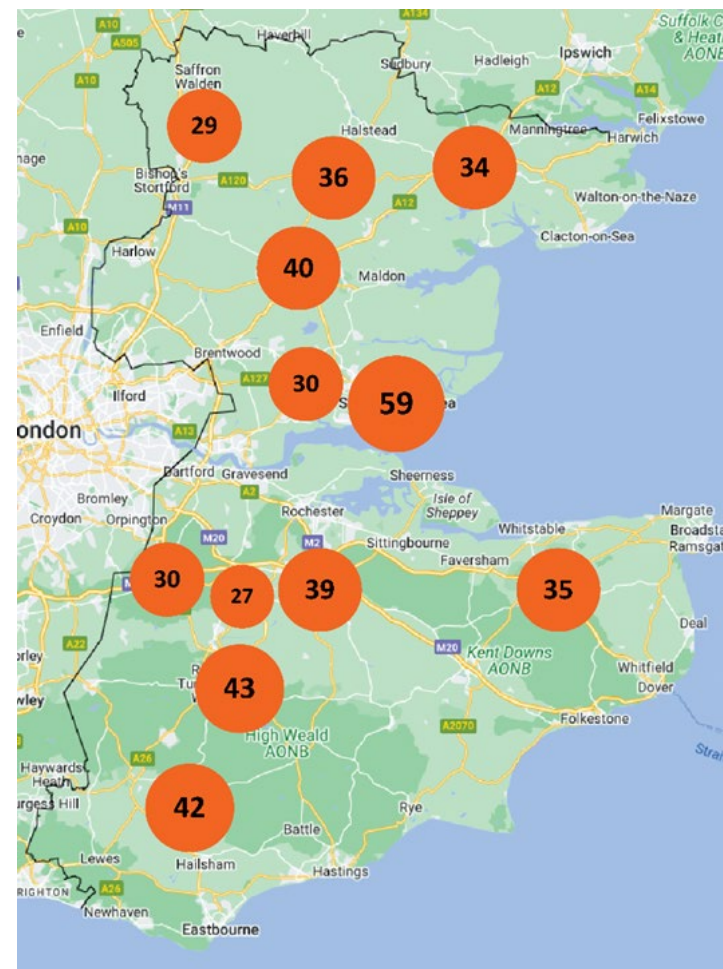
An initial review of the sector using the RTIC method identifies some **763** registered businesses across SELEP in this sector, but with many being **micro** businesses with no published information on employee numbers or turnover. Only **5** of these identified businesses are **sufficiently large** enough to be required to publish accounts with turnover figures, showing that this sector as defined is **very much focussed** in the **SME** sector.

Of the total number of companies identified in this sector, most (**46%**) are classified at Companies House as being within the **Professional Services sector**, with **24%** in the **Information and Communication sector**.

At a more detailed level, the companies identified are **strongly present** in fields such as **Computer Consultancy, Other Information Technology Activities, Architectural Activities, Advertising, Specialised Design Activities, and Other Business Support Activities** not elsewhere classified. The presence of the last activity demonstrates one of the weaknesses of SIC codes in relation to new emerging activity, in that companies cannot find an appropriate SIC code, so use the capture-all of "not elsewhere classified".

Business count by local authority

Source: The Data City, Google Maps



Of the businesses identified within the SELEP region, **all 32 local authorities were present** within the RTIC sector, with the **highest** numbers in **Southend (59)**, and **more than 40** in each of **Tunbridge Wells, Wealden and Chelmsford**. There is **very low** presence in **Thurrock, Harlow and Dover**, with some **coastal areas** also with **quite low** presence including **Hastings, Maldon, Tendring and Rochford**.

With so little direct financial information available for this sector SELEP based businesses from published accounts at Companies House, we can draw upon some wider national insights from Data City's own analysis. Data City identify **12,400** companies nationally with **77,700** employees and **£9.1 billion** turnover, which equates to an average turnover of **738,000 per company** and **6 employees**. Data City also identify an average growth rate of **1.7% per year** for companies in this sector and note that **venture capital funding** is **not increasing** as fast as other emerging sectors.

Advanced Manufacturing

A rapidly evolving landscape and the increasing importance of digitalisation means that innovation is more important than ever in this sector. This is reflected in the R&D funding, with **£7.8 billion in investment funding** and **£213.5 million Innovate UK funding** from the last 5 years. Whilst SELEP has a **relatively low presence** in Manufacturing, it is a sector of interest due to the **high innovation scores** (from sources such as the UK Innovation Survey) and **growth potential**.

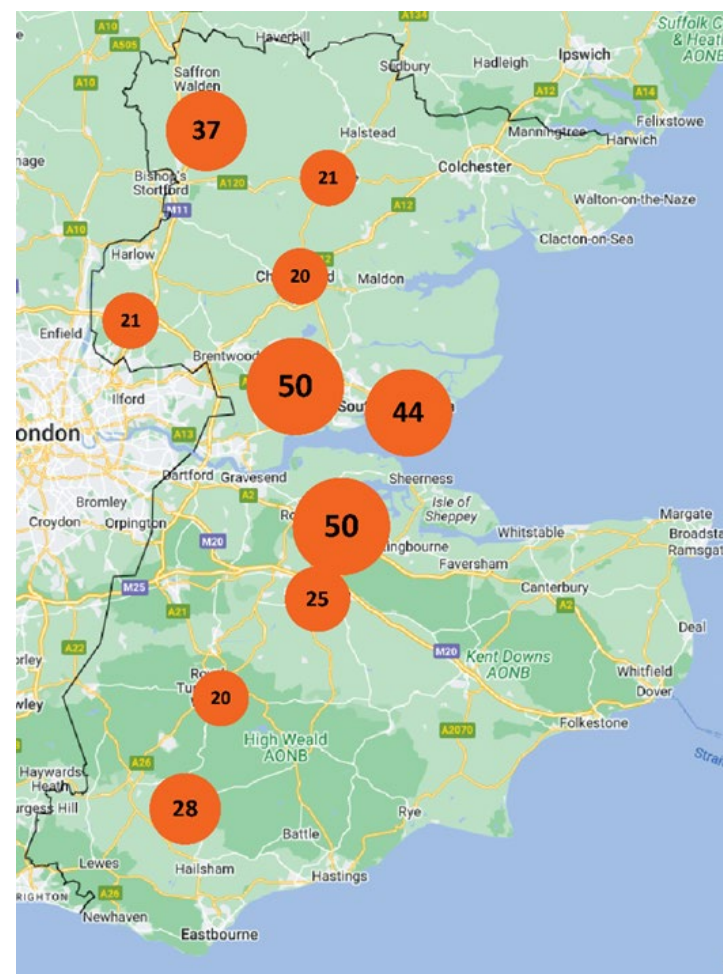
Data city defines this RTIC sector as those companies using the **most innovative technologies and processes** to **increase productivity**, often in the **highest value-add parts of manufacturing sectors**. This includes companies involved in **Advanced Measurement, Artificial Intelligence, Augmented and Virtual Reality, Coating Tech, Computer Aided Manufacturing, Cutting and Machining, Data Services, Digital Design, Digital Twins, Forging, Forming, Industrial IoT (Internet of Things), Moulding, Prototyping and Robotics and Automation**. Analysis identified **584 companies** in this RTIC sector in the SELEP region.

Of the total number of companies identified in this sector, most (**35%**) are classified at Companies House as being within the **Manufacturing SIC sector**, **24%** fall under **Professional, scientific and technical activities**, **9%** fall under **Information and Communication** and **8%** fall under **Construction**.

At a more detailed SIC level, the companies identified are **strongly present** in fields such as **Other engineering activities, Manufacture of other fabricated metal products not elsewhere classified, Machining, Other Business Support Services not elsewhere classified, Other Manufacturing not elsewhere classified, Information technology consultancy activities and Manufacture of other plastic products**.

Business count by local authority

Source: The Data City, Google Maps





SOUTH EAST LOCAL ENTERPRISE PARTNERSHIP

Of the businesses identified within the SELEP region, **all 32 local authorities were present within the RTIC sector**. **Medway** was the **most common** location with **50** companies, **Basildon** a close second (**49**) and **Southend-on-Sea** third (**44**). There is a **fairly steep drop off from there**, with **Uttlesford** having **37** companies and then **Wealden** having **28** companies. **Hastings** had the **fewest** Advanced Manufacturing companies with only **4**. **Gravesham, Rother, Dover, Rochford, Folkestone and Hythe, Lewes and Sevenoaks** all had **10 or fewer** companies within the RTIC sector.

At a national level, The Data City estimates **11,655** companies with **317,099** employees and a total turnover of **£121.9 billion**. They also estimate a **+5.6%** company growth rate per year. Please note that these high-level summary figures are likely to be overestimates due to the methodology of their analysis.

Supply chain logistics

The Retail Sector took a massive hit during the pandemic and the Supply Chain Logistics sector is crucial to the health of a Retail Sector that was already facing challenges before 2020. In fact, **£10 billion of investment funding** was spent on the sector in 2022 **alone**, compared to only **£3.5 billion** of investment funding from every year between 2000-2022 combined. Retail jobs account for **11% of SELEP jobs, second only** to Health, hence the future of the sector is of great interest. The sector is **especially prevalent in estuarine parts of the region**.

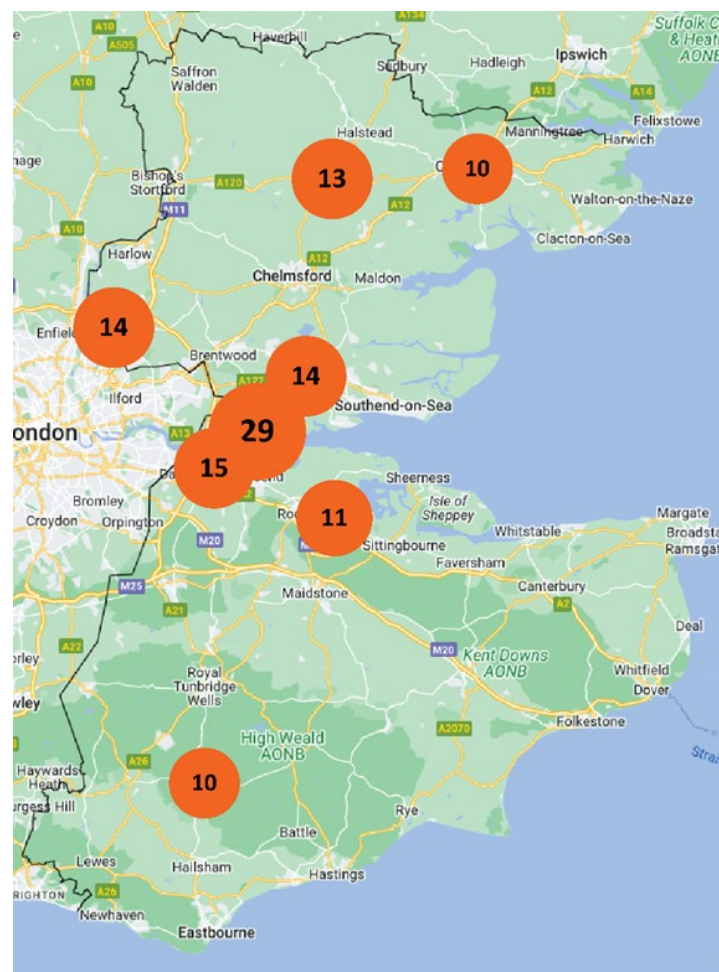
Data city defines this sector as those companies that **optimise logistics** often by **tracking products** and **improving operational efficiency** across supply chains through **innovative technology** or **processes**. This includes companies that utilise **Artificial Intelligence, Automation, Blockchain** and **Digital Twins, Freight Tracking Technology, Management Platforms, Service Providers** and **Supply Chain Visibility**. Analysis identified **237** companies in this RTIC sector in the SELEP region.

Of the total number of companies identified in this sector, most (**54%**) are classified at Companies House as being within the **Transportation and Storage** SIC sector, **11%** are classified under the **Administrative and Support Service** sector and **10%** under the **Professional, Scientific and Technical Activities** sector.

At a more detailed SIC level, the companies identified are **strongly present** in fields such as **freight transport by road, other transportation support activities, operation of warehousing and storage facilities for land transport, other business support service activities** not elsewhere classified, **management consultancy activities other than financial management, information technology consultancy activities** and **sea and coastal freight water transport**.

Business count by local authority

Source: The Data City, Google Maps



Of the businesses identified within the SELEP region, **30 of the 32 local authorities were present within the RTIC sector**, Swale and Thanet being the two without any companies. The other local authorities with the **lowest presence** in the RTIC sector, were Rochford, Eastbourne, Hastings, Rother and Folkestone and Hythe who all had between 1-3 companies within the RTIC sector. Perhaps surprisingly, these are **all coastal local authorities** and **most** of the other coastal local authorities had a **similarly low presence**, with the **exception** of Medway, Wealden and Castle Point. Thurrock was the **most common** local authority with **29** companies. Dartford, Epping Forest, Braintree, Basildon, Medway, Tendring, Colchester and Wealden all had between 10-15 companies operating within the RTIC sector.

At a national level, The Data City estimates **3583** companies with **285,902** employees and a total turnover of **£76.2 billion**. They also estimate a **+5.1%** company growth rate per year. Please note that these high-level summary figures are likely to be overestimates due to the methodology of their analysis.

FoodTech is an **emerging sector** that we have selected due to its potential for reaching a **sustainable equilibrium** as a part of our **Clean Growth** plan. Despite being a **fairly new** sector, R&D investment has been **significant** in recent years, with **£9.1 billion** total investment funding and **£83 million Innovate UK funding** across the last 5 years. Targets from the Government and COP summits mean that this is a sector to watch, even if the sector currently has a **low presence** within the region.

Data city defines this RTIC sector as those companies **developing food and drink processing technologies**, the taxonomy is adapted from **Forward Fooding**. These companies are involved in **AgriTech, Consumer Products and Services, Food Delivery, Food Processing, Food Safety and Traceability, Food Surplus, Kitchen Tech and Next Generation Foods**. Analysis identified **102** companies in this RTIC sector in the SELEP region.

Of the total number of companies identified in this sector, most (**18%**) are classified at Companies House as being within the **Wholesale and Retail Trade** SIC sector, **17%** fall under **Information and Communication**, **16%** under **Manufacturing**, **14%** under **Accommodation and Food Service activities** and **12%** under **Professional, Scientific and Technical activities**.

At a more detailed SIC level, the companies identified are **strongly present** in fields such as **Other Business Support Service activities** not elsewhere classified, **Business and domestic software development**, **Take-away food shops** and **mobile food stands**, **Other information technology service activities** and **other manufacturing** not elsewhere classified.

Business count by local authority

Source: The Data City, Google Maps





Of the businesses identified within the SELEP region, **30 of the 32 local authorities were present within the RTIC sector**, Castle Point and Maldon being the two without any companies. The other local authorities with the **lowest presence** in the RTIC sector, were **Tendring, Folkestone and Hythe, Basildon, Eastbourne, Harlow, Canterbury, Hastings, Tunbridge Wells, Uttlesford, Dartford and Gravesham** who all had a **single** company within the RTIC sector. **Ashford** had the **most** FoodTech companies at **9**, followed by **Chelmsford** with **8** and **Southend-on-Sea** and **Medway** with **7**.

At a national level, The Data City estimates **2,584** companies with **205,806** employees and a total turnover of **£147.6 billion**. They also estimate a **+3.9% company growth rate per year**. Please note that these high-level summary figures are likely to be overestimates due to the methodology of their analysis.

Modular Construction

Whilst Modular Construction is a smaller sector that has historically not received a lot of funding, it is of interest because of the **cluster** of businesses in **Dartford** (and to a lesser extent **Basildon** and **Maldon**). SELEP has historically had a larger presence in **Construction** than in **Manufacturing**, relative to the national proportions, hence it is worth looking at a Construction sub-sector with growth potential. SELEP has also been running a project on **Tutor Shortages** with a specific focus on the **Construction** and **Engineering** Sectors.

Data city defines this RTIC sector as those companies **producing buildings** or **parts of buildings** in **factories** for **later assembly on site**. These companies are involved in **Off site construction**, **Permanent Modular Buildings** and **Supply Chain**. Analysis identified **83** companies in this RTIC sector in the SELEP region.

Of the total number of companies identified in this sector, most (**56%**) are classified at Companies House as being within the **Construction** SIC sector, **15%** fall under **Professional, scientific and technical activities** and **11%** under **Manufacturing**.

At a more detailed SIC level, the companies identified are **strongly present** in fields such as **Construction of Commercial Buildings**, **Activities of Head Offices**, **Other specialised construction activities** not elsewhere classified, **Development of building projects**, **Manufacture of other builders' carpentry and joinery** and **other construction installation**.

Business count by local authority

Source: The Data City, Google Maps





SOUTH EAST
LOCAL ENTERPRISE
PARTNERSHIP

Of the businesses identified within the SELEP region, **19 of the 32 local authorities were present within the RTIC sector**. **Dartford** was by far the **most popular** local authority within the Modular Construction RTIC sector with **34** companies. **Basildon** and **Maldon** were the **next most common** locations with **11** and **9** companies respectively. The local authorities absent in the sector are **Castle Point, Colchester, Epping Forest, Gravesham, Lewes, Rochford, Rother, Sevenoaks, Swale, Tendring, Thurrock, Tonbridge and Malling and Uttlesford**.

At a national level, The Data City estimates **819** companies with **45,863** employees and a total turnover of **£8.6 billion**. They also estimate a **+6.2%** company growth rate per year. Please note that these high-level summary figures are likely to be overestimates due to the methodology of their analysis.

AgriTech is an exciting emerging sector, due to its potential for addressing the **sustainability** and **productivity** challenges we face both **nationally** and **locally**. Investment funding has been **significant** despite being a **very new** sector, with **£1 billion in investment funding** across the last five years, with 2023 looking already to be a year of strong investment. There is currently a **low** presence within the SELEP region and so it will be **challenging** to compete with the **existing competitors** due to **first mover advantage**.

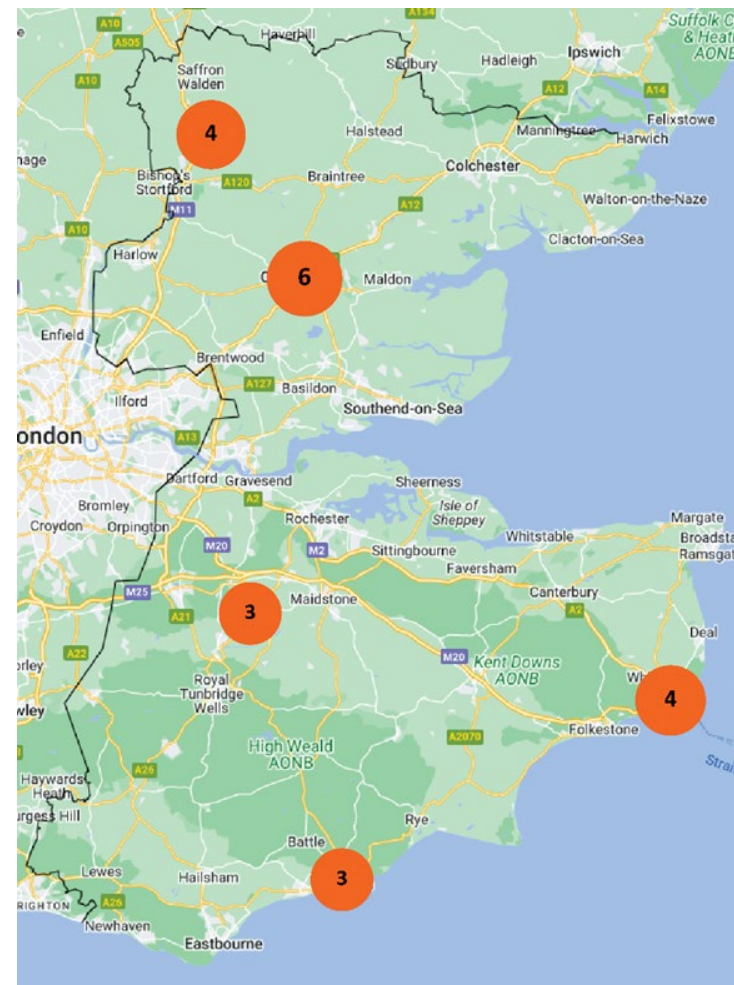
Data city defines this RTIC sector as those companies **developing and implementing new agricultural technologies**, with an **additional focus on Net Zero advancements** in the field. This includes companies involved in **AgSciences, Automation, Drone Technology, Management Platforms, Precision Farming, Remote Sensing and Vertical Farming**. Analysis identified **44** companies in this RTIC sector in the SELEP region.

Of the total number of companies identified in this sector, most (**25%**) are classified at Companies House as being within the **Professional, Scientific and Technical activities** SIC sector, **21%** fall under the **Manufacturing** SIC sector, **21%** are classified under **Agriculture, Forestry and Fishing** and **16%** come under **Information and Communication**. It is clear from this that traditional SIC analysis here would be incredibly difficult due to the **diffuse** nature of the emerging AgriTech sector.

At a more detailed SIC level, the companies identified are **strongly present** in fields such as **Support activities for crop production, Other manufacturing not elsewhere classified, Other research and experimental development on natural science, Other specialist photography, Information technology consultancy activities, Manufacture of fertilisers and nitrogen compounds, Installation of industrial machinery and equipment and Management consultancy activities other than financial management**.

Business count by local authority

Source: The Data City, Google Maps



Of the businesses identified within the SELEP region, **19 of the 32 local authorities were present within the RTIC sector**. **Chelmsford** was the most common local authority with **6 AgriTech** companies. **Uttlesford** and **Dover** had 4 companies within the sector. The local authorities absent in the sector are **Ashford, Canterbury, Castle Point, Dartford, Eastbourne, Gravesham, Harlow, Lewes, Rochford, Sevenoaks, Thanet, Thurrock** and **Tonbridge Wells**.

At a national level, The Data City estimates **1,225** companies with **36,821** employees and a total turnover of **£11.4 billion**. They also estimate a **+4.7%** company growth rate per year. Please note that these high-level summary figures are likely to be overestimates due to the methodology of their analysis.

Federated Areas

Below are the Local Authorities that fall under each Federated Area.

Team East Sussex (TES)

- Eastbourne
- Hastings
- Lewes
- Rother
- Wealden

Kent and Medway Economic Partnership (KMEP)

- Medway
- Ashford
- Canterbury
- Dartford
- Dover
- Gravesham
- Maidstone
- Sevenoaks
- Folkestone and Hythe
- Swale
- Thanet
- Tonbridge and Malling
- Tunbridge Wells

Opportunity South Essex (OSE)

- Southend-on-Sea
- Thurrock
- Basildon
- Brentwood
- Castle Point
- Rochford

Success Essex (SE)

- Braintree
- Chelmsford
- Colchester
- Epping Forest
- Harlow
- Maldon
- Tendring
- Uttlesford

The information presented in this report comes from a wide range of sources, which have then been analysed and presented by in-house resource within SELEP. Due to the number of sources, we have used the most recent data where possible (as of June 2023). The original source data for each section of the report is detailed below.

Population	Population estimates – local authority based by single year of age, Office for National Statistics Subnational population projections for England, 2018-based, 2016-based, 2014-based & 2012-based, Office for National Statistics
Migrant Population	Census 2021, Office for National Statistics Census 2011, Office for National Statistics
Dwellings	Table 122, Live tables on housing supply: net additional dwellings, Department for Levelling Up, Housing and Communities Table 100, Live tables on dwelling stock (including vacants), Department for Levelling Up, Housing and Communities
Non-domestic property stock	Non-domestic rating: stock of properties including business floorspace, Valuation Office Agency
Broadband access	Connected Nations and infrastructure reports, Ofcom
Carbon Emissions	UK local authority and regional greenhouse gas emissions national statistics, Department for Business, Energy & Industrial Strategy
Electric Vehicle charging	Electric vehicle charging device statistics, Department for Transport
New dwelling energy efficiency	Table NB1, Live tables on Energy Performance of Buildings Certificates, Department for Levelling Up, Housing and Communities
Economic output	Regional gross value added (balanced) by industry: local authorities by ITL1 region, Regional economic activity by gross domestic product, Office for National Statistics
Business counts	UK Business Counts – enterprises by industry and employment size band, Office for National Statistics via NOMIS
Business growth	Business demography, UK, Office for National Statistics
R&D and Innovation	Corporate tax: Research and Development Tax Credits, HM Revenue and Customs Government grants register, Government grants statistics, Cabinet Office Innovate UK funded projects since 2004, UK Research and Innovation UK Innovation Survey, Department for Business, Energy & Industrial Strategy

Exports	Regional trade statistics, HM Revenue and Customs
Employee jobs	Business register and Employment Survey, Office for National Statistics
PAYE employee jobs	Earnings and employment from Pay As You Earn Real Time Information, seasonally adjusted, Office for National Statistics
Job density	Jobs density, Office for National Statistics via NOMIS
Economic activity rate/ Self-employment rate/Unemployment rate	Annual Population Survey, Office for National Statistics via NOMIS
Claimant rate	Claimant Count, Office for National Statistics via NOMIS
Online job postings	Job Postings Analytics, Lightcast
Wages	Annual Survey of hours and earnings, Office for National Statistics via NOMIS
Jobs in knowledge intensive sectors	Business register and Employment Survey, Office for National Statistics Industry (SIC07) at 2 digit level by level of highest qualification held: 2004 to 2015,
Jobs in low pay sector	Business register and Employment Survey, Office for National Statistics Annual Survey of hours and earnings, Office for National Statistics
Highest level of qualification	Census 2021, Office for National Statistics
Destinations after completing 16-18 education	16-18 destination measures, Department for Education
Apprenticeships	Apprenticeships and traineeships, Department for Education
Higher Education Progression Rate	Widening participation in higher education, Department for Education
A level and other 16 to 18 results	A level and other 16 to 18 results, Department for Education
Employment Profile	Annual Population Survey, Office for National Statistics via NOMIS
Sectors - Size and growth/Sector Specialisation	Business register and Employment Survey, Office for National Statistics
Focus on Sectors	The Data City - a data as a service company providing unique, real-time industrial data on the most dynamic emerging economic sectors