



State of the Region

An analytical report of the South East economy

produced by SELEP

March 2024



**SOUTH EAST
LOCAL ENTERPRISE
PARTNERSHIP**



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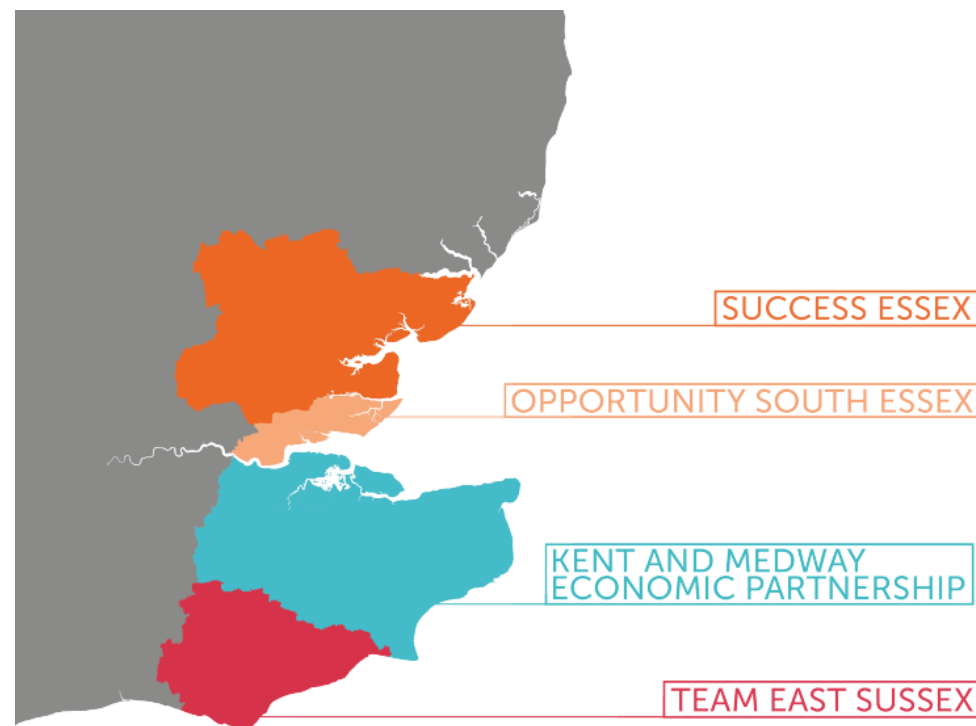


The **South East Local Enterprise Partnership (SELEP)** published its first State of the Region report in July 2023 to inform the work of SELEP Ltd and our partners, building on our robust approach to evidence based strategic economic planning. With LEP responsibilities transitioning to Local Authorities from April 2024, this report provides an updated State of the Region, using the most recent data available in **March 2024** to give an overview of current economic performance and how it has been impacted in recent years. This data is presented at a SELEP level and, where available, at a more local level to support future economic growth activities led by the Local Authorities. Where updated data has not been made available since the July 2023 report was published, the data presented in this report remains the same.

SELEP is one of the largest **Local Enterprise Partnerships (LEPs)** in the country and has made an enormous contribution to the growth of the South East's economy since its inception in 2011. The LEP encompasses the local authority areas of **East Sussex, Kent, Medway, Southend, Thurrock and Essex**. Our **business-led Strategic Board** has set the strategic direction for the LEP, providing **clear strategic leadership** and **championing shared SELEP priorities**. It has provided 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 has operated a **federated model** of local LEP Boards by geographical area, which allowed for **decision-making** and **project prioritisation** at a **local** level. The four federated boards were **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 for 2023/24 can be found in **appendix 1 (Federated Areas)**. While the federated structures for TES and KMEP will continue, data has also been provided at Upper Tier Local Authority level to enable partners to use this data as appropriate in their future structures post LEP transition.

Further details on SELEP data and intelligence can be found on the SELEP website, including the [2023 State of the Region report](#).



ECONOMIC OVERVIEW

BUSINESS

176,505
BUSINESSES AS
OF MARCH 2023



19,615
NEW BUSINESSES
IN 2023



20,340
BUSINESSES
CLOSED IN 2023



61.5%
THREE-YEAR SURVIVAL
RATE (ENGLAND: 57.5%)

15.1%

SELF-EMPLOYMENT
RATE



13.0%

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

PLACE



4.304 million

usual resident population (2022)
6.4% share of UK's population

7.1% ten-year growth (compared to UK's 5.9%)

13 Further Education colleges

9 universities



8 ports
Thames Freeport
and Freeport East

2 Freeports



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

EMPLOYMENT

79.4%
POPULATION
AGED 16-64
ECONOMICALLY
ACTIVE
(UK: 78.9%)



4.4%
UNEMPLOYMENT
AS % OF
ECONOMICALLY
ACTIVE
POPULATION
(SEPT 2023)
(UK: 3.9%)

3.3%
CLAIMANT
RATE AS % OF
POPULATION
AGED 16-64
(DEC 2023)
(UK: 3.8%)

78
JOBS PER 100 RESIDENTS
AGED 16-64 (ENGLAND: 88)

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

SKILLS



Apprenticeship starts:

Academic year 2022/23: 23,970

Academic year 2021/22: 24,590

Academic year 2020/21: 22,480

SELEP

Level 4 qualification
and above:

29.1%

Level 2 qualification
and above:

67.4%

No qualifications:

18.5%



England

Level 4 qualification
and above:

33.9%

Level 2 qualification
and above:

69.4%

No qualifications:

18.1%

ECONOMY



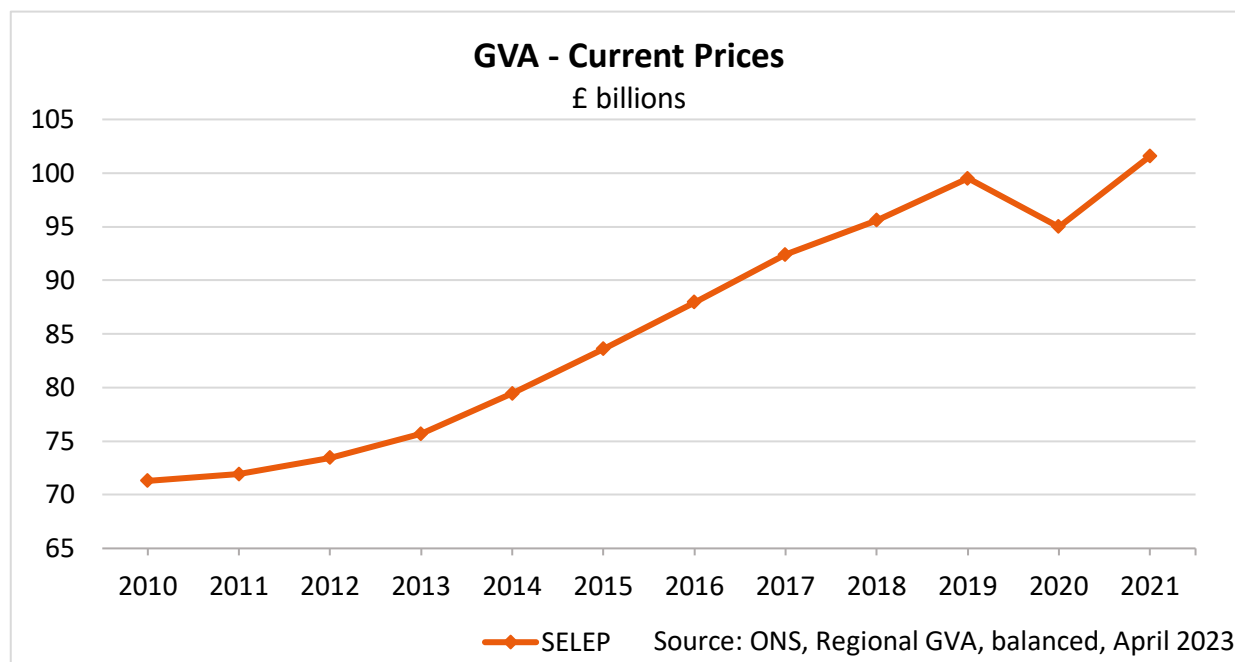


Economic output

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. New data was due to be released by ONS in March 2024, but was not available at the time of publishing.

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**.

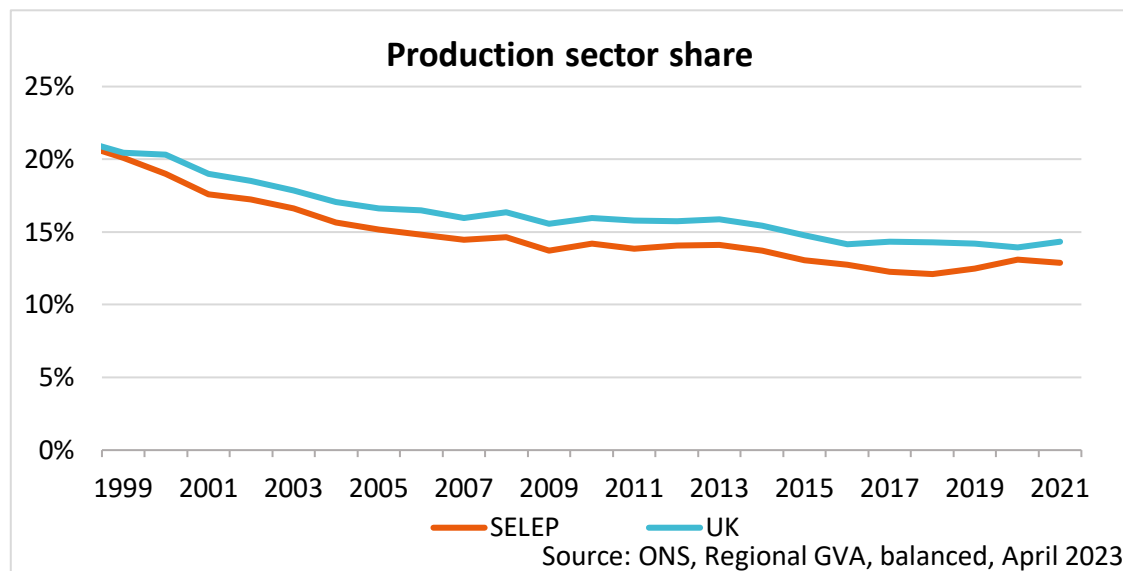
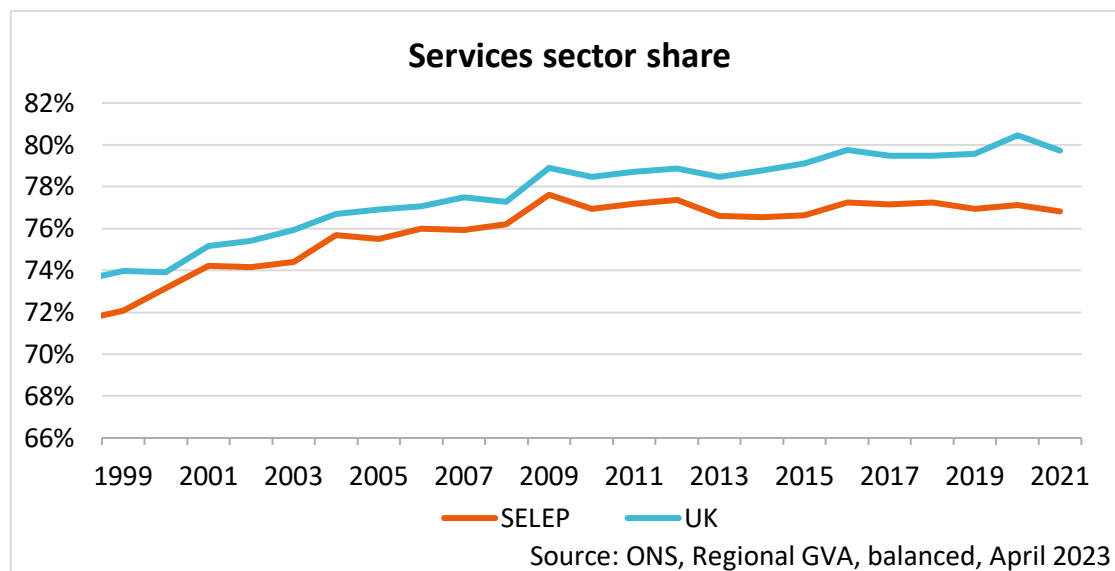
The 2021 figure compares to **£99.5 billion** in 2019 at 2019 prices. The 2021 GVA figures at 2019 prices would be **£96.3 billion**, representing a **£3.2 billion loss** or **3.2% real term reduction**. This is a **smaller reduction** than seen for the UK, where **real GVA fell by 3.6%**. While the 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**.





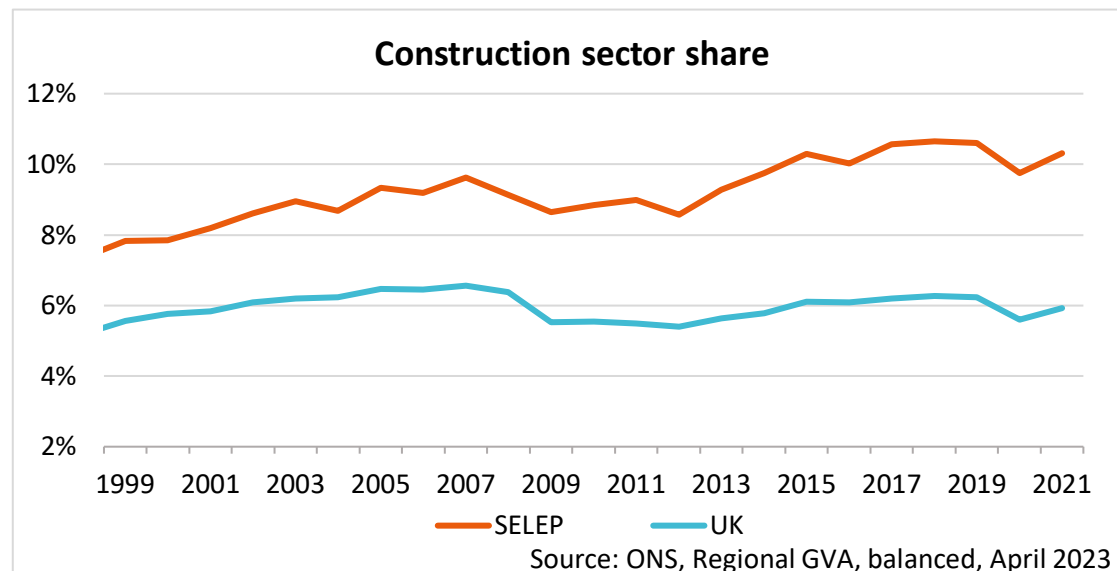
For SELEP the **Services Sector** makes up **76.8%** of GVA, with **Construction** contributing **10.3%** and the **Production Sector** **12.9%**. For the UK, the respective figures are **79.7%**, **5.9%** and **14.3%**. At this high level of analysis, SELEP shows a **strong relative economic contribution**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





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.





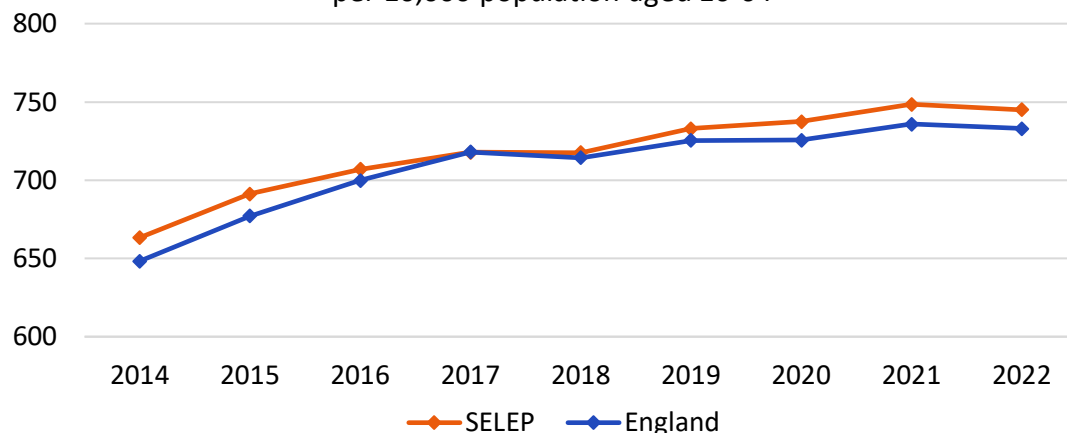
Business counts

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 **191,725 active enterprises** based in SELEP during 2022, which was **745 per 10,000 working age population**, **above** the national average of **733**. Across Federated Areas the enterprise rate per head of working age population was **highest in SE** at **801** and **lowest in KMEP** at **704**.

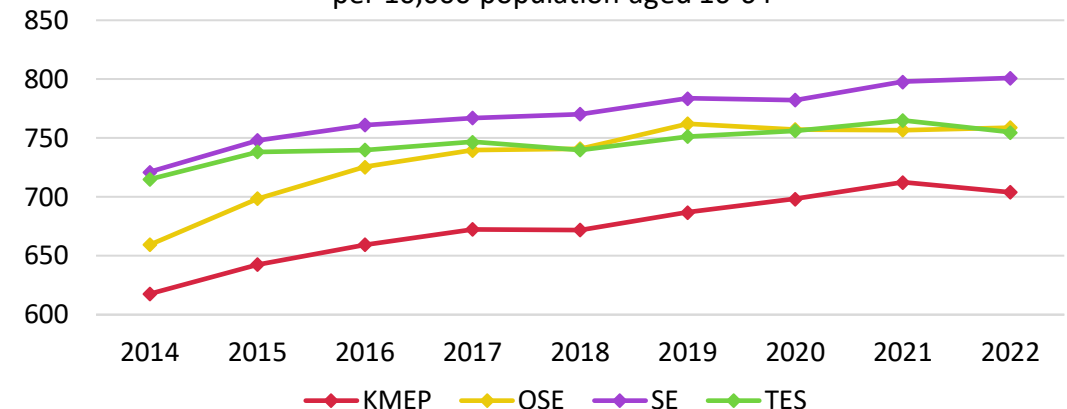
At a local authority level, the number of active businesses during 2022 was highest in **Epping Forest, Uttlesford and Brentwood** at **above 1,000** businesses per 10,000 working age population. The local authorities with the **fewest** active businesses are all **coastal**, with **Dover, Medway, Hastings, Swale, Eastbourne, Thanet and Tendring** all having **below 610** active businesses per 10,000 working age population. However, some coastal local authorities have an **above** average number of active businesses including **Wealden, Maldon, Rother, Lewes and Rochford**.

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



Source: ONS Business Demography, November 2023

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

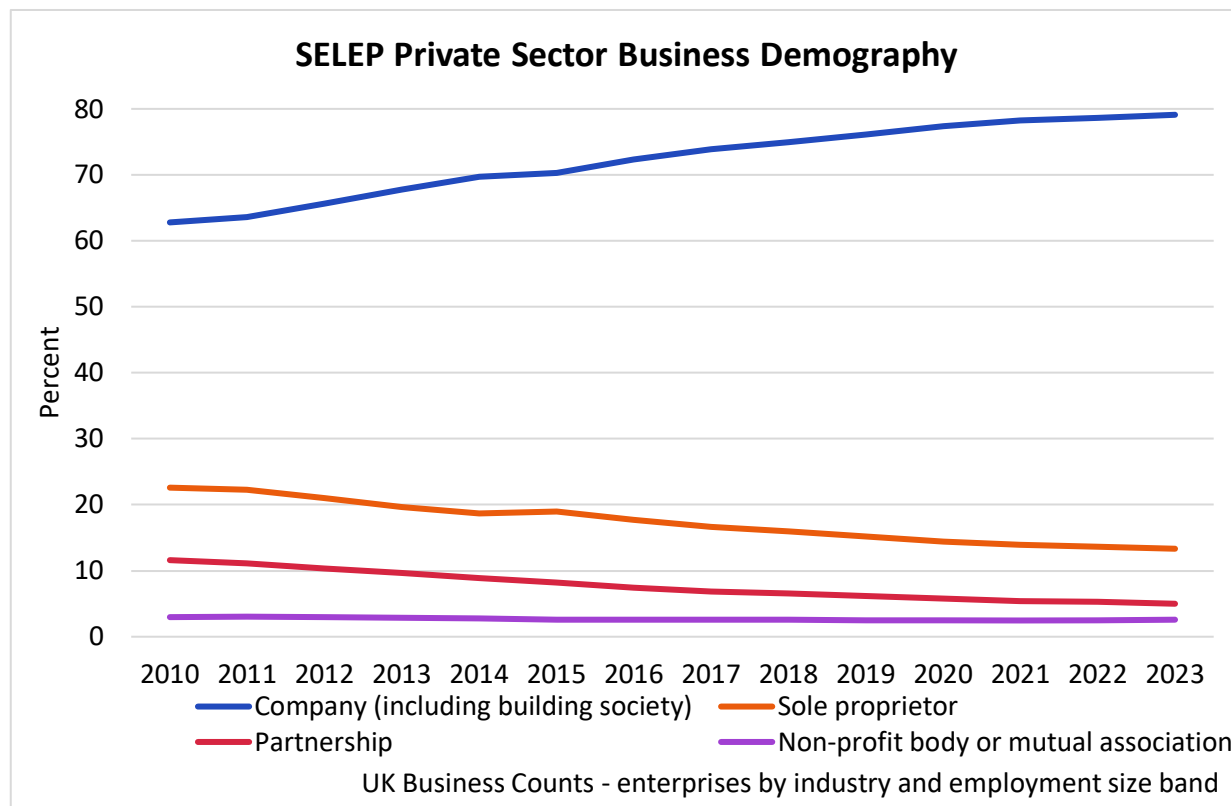


Source: ONS Business Demography, November 2023



The **stock of businesses** in SELEP in March 2023 was **176,505**, reflecting the number of businesses on a single date. This was **1% lower** than March 2021, a **smaller contraction** than seen nationally (-1.6%). SELEP business stock was **7.4%** of the England total and **6.5%** of the UK total. Business counts include some public sector organisations, with some **1,100 public sector organisations** included in the figures for SELEP, **13.4% more** than the 2022 amount.

Most private sector organisations included in the business count data are registered as **companies** which account for **79.1% of private sector business stock**. **Sole proprietors** account for **13.3% of business stock**, but this has **fallen** every year since 2015. **Partnerships** account for **5.0% of private sector business stock**, also on a **reducing trend** having been **9.7% of stock** in 2013. **Not-for-profit bodies** account for **2.6% of private sector business stock**, a number which has remained **stable** over the last 10 years. 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 **26%** since 2013. The number of not-for-profit bodies has **increased slightly** from **3,965** in 2013 to **4,495** in 2023.

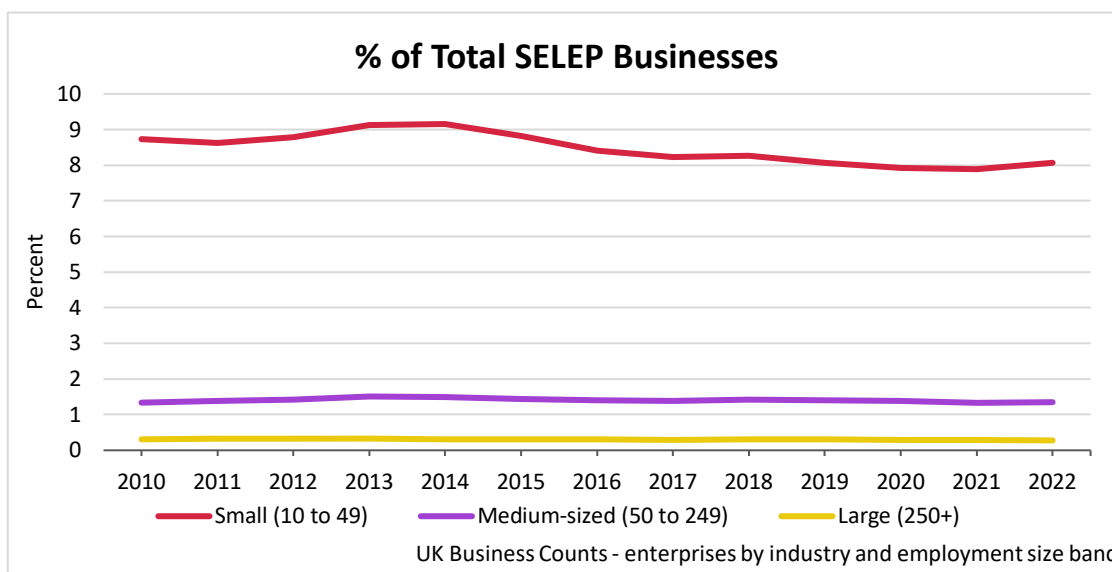
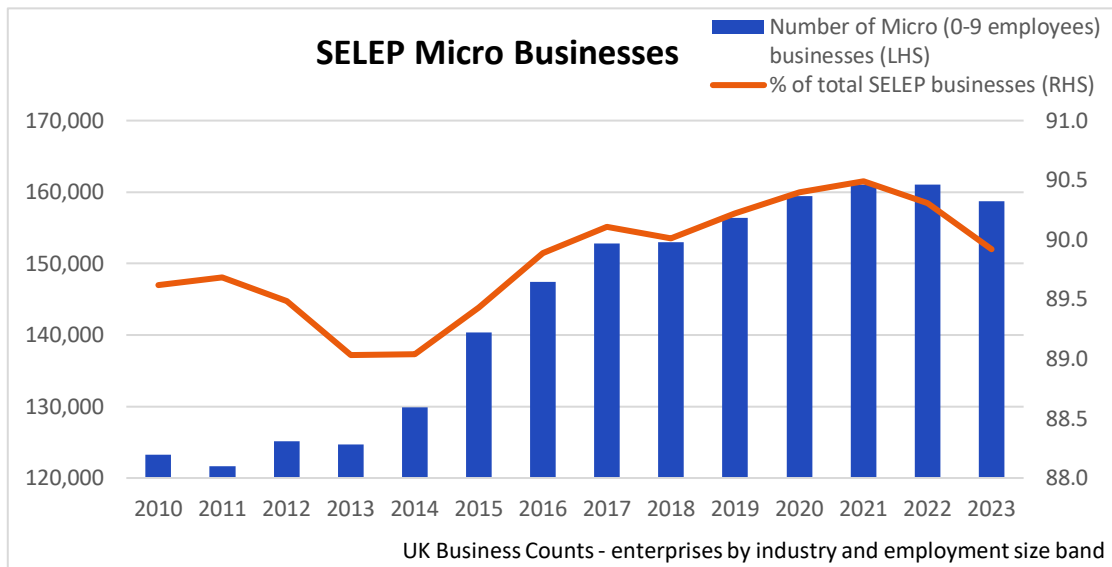




Most businesses are classed as **Micro**, which means **less than 10** employees. Micro sized businesses account for **89.9%** of stock (**158,715 businesses**), **up** from **89.0%** in 2013. **Small** businesses with **under 50** employees **but more than 9** account for **8.4%** of stock (**14,810 businesses**), **down** from **9.1%** in 2013.

Medium sized businesses (**50 to 249 employees**) account for **1.4%** of business stock (**2,475 businesses**) **down** from **1.5%** of stock in 2013. There are **505 Large** businesses with **250 or more** employees. The number of Micro businesses has **increased** by **27%** since 2013, whilst the number of Small and Medium sized businesses has **increased** at a **slower** rate (**16%** and **13%**), hence their **reducing share** of stock. The number of Large businesses has remained **consistent** since 2015.

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 **higher** proportion of Micro businesses and a **smaller** proportion of small, medium and large businesses. If SELEP had the same shares as seen nationally, we would expect there to be **1,273 fewer** micro businesses, **722 more** small businesses, **349 more** medium businesses and **201 more** large businesses. In terms of significant differences, the **shortfall of 201 large companies is most striking**. Having a slightly higher proportion of Micro business is something **SELEP shares with London and a number of LEPs 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 LEPs, in that they generally have a lower share of Micro businesses and a higher proportion of Large businesses.



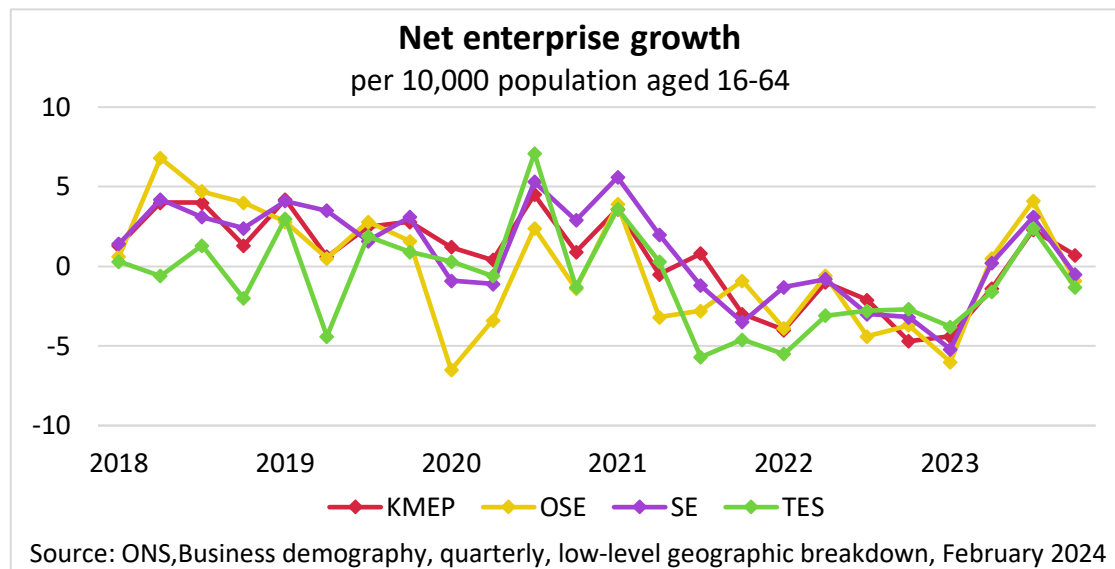
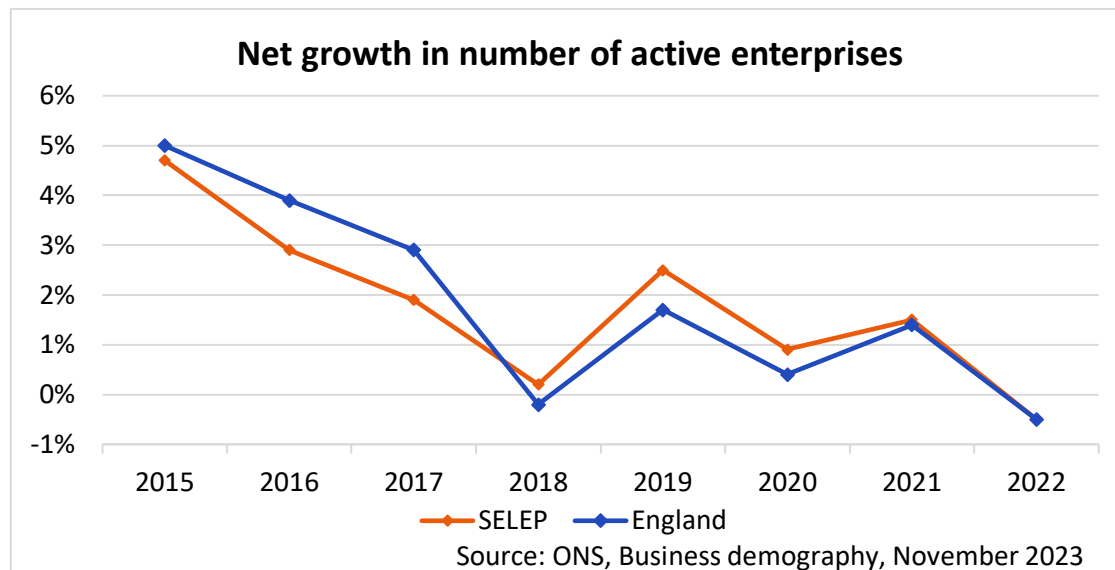


Business growth

The number of active enterprises had been **increasing** each year in SELEP, however there was a **0.5% contraction** in 2022, matching the national contraction. Across Federated Areas **SE** and **OSE** saw small **growth**, whilst **KMEP** and **TES** saw a **larger contraction** than the national average.

Statistics on active enterprises are only released annually and the figures above are from the November 2023 release. However, Business Demography statistics on enterprise births and deaths are now available on a quarterly basis, with the latest release in February 2024. These figures suggest **significant losses** throughout 2022 in both SELEP and nationally, however the picture for 2023 is more **mixed**. Q1 2023 saw **losses** across SELEP and the UK, Q2 saw **small gains** in OSE and SE and **losses** everywhere else, Q3 saw **growth** across the UK and Q4 saw **losses everywhere** but KMEP. Whilst these figures are experimental, they give us an insight into what to expect for future releases. Overall, these figures suggest there was a **larger contraction** in SELEP compared to nationally in 2022, but a **smaller relative contraction** in 2023.

At a local authority level, net business losses over 2022 and 2023 as a percentage of business stock have been highest in **Rother, Dover and Thanet** all **above 5%** of stock. Exceptionally, **Castle Point, Eastbourne and Sevenoaks** have seen a **slight increase** in business stock during 2022 and 2023 with a **low level of losses** in **Hastings and Colchester** as well.





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. SELEP's previous State of the Region provided some analysis on R&D tax relief claims and R&D expenditure and is available to view [here](#). For the purposes of this report, data and analysis provided to SELEP by Innovate UK in February 2024 has been included.

For the following tables:

Sum of Award Offered = The total amount of grant offered

Sum of Total Costs = The total cost of the projects

Distinct Count of Participants = The number of different enterprises receiving support

Innovate UK grant offered 2013/14 to 2022/23	East Sussex			Essex			Kent & Medway			TOTAL					
	Sum of Award Offered	Sum of Total Costs	Distinct Count of Participants	Sum of Award Offered	Sum of Total Costs	Distinct Count of Participants	Sum of Award Offered	Sum of Total Costs	Distinct Count of Participants	Sum of Award Offered		Sum of Total Costs		Distinct Count of Participants	
Low Carbon Transport & Mobility	£2.0m	£3.6m	6	£63.5m	£147.0m	33	£5.1m	£7.8m	21	£70.6m	35.8%	£158.4m	44.2%	60	9.7%
Responsive, Global, Lending and Investment	£7.9m	£11.6m	70	£30.8m	£43.8m	177	£23.3m	£32.1m	166	£62.0m	31.5%	£87.5m	24.4%	411	66.6%
Health & Life Sciences	£1.2m	£1.7m	6	£4.6m	£7.3m	21	£11.2m	£24.2m	18	£17.0m	8.6%	£33.2m	9.3%	45	7.3%
Food and Agritech	£0.5m	£0.8m	3	£2.6m	£4.4m	14	£11.0m	£17.0m	49	£14.1m	7.1%	£22.2m	6.2%	65	10.5%
Clean Growth & Infrastructure	£0.8m	£1.2m	10	£6.7m	£10.9m	29	£6.4m	£10.3m	31	£13.8m	7.0%	£22.4m	6.3%	70	11.3%
Advanced Manufacturing	£2.5m	£3.7m	11	£5.3m	£10.3m	26	£3.3m	£5.2m	21	£11.1m	5.6%	£19.2m	5.4%	58	9.4%
AI & Data Economy	£0.3m	£0.5m	6	£7.1m	£13.4m	12	£1.1m	£1.5m	6	£8.5m	4.3%	£15.4m	4.3%	24	3.9%
Grand Total	£15.2m	£23.1m	93	£120.5m	£237.1m	258	£61.3m	£98.1m	271	£197.1m		£358.2m		617	
% of respective totals	7.7%	6.4%	15.1%	61.1%	66.2%	41.8%	31.1%	27.4%	43.9%						



SOUTH EAST LOCAL ENTERPRISE PARTNERSHIP

Innovate UK grant offered 2013/14 to 2022/23	East Sussex			Essex			Kent & Medway			TOTAL					
Enterprise type	Sum of Award Offered	Sum of Total Costs	Distinct Count of Participants	Sum of Award Offered	Sum of Total Costs	Distinct Count of Participants	Sum of Award Offered	Sum of Total Costs	Distinct Count of Participants	Sum of Award Offered		Sum of Total Costs		Distinct Count of Participants	
Small & Medium Enterprises	£14.4m	£21.8m	87	£44.5m	£75.9m	214	£43.3m	£71.9m	232	£102.2m	51.9%	£169.6m	47.3%	530	85.9%
Large business			2	£57.7m	£136.8m	35	£4.3m	£9.1m	30	£62.0m	31.4%	£145.9m	40.7%	67	10.9%
Academic & RTO	£0.8m	£1.2m	2	£17.1m	£23.0m	10	£13.4m	£16.8m	8	£31.3m	15.9%	£41.0m	11.4%	18	2.9%
Public sector	£0.1m	£0.1m	3	£1.2m	£1.4m	5	£0.3m	£0.3m	6	£1.6m	0.8%	£1.8m	0.5%	14	2.3%
Grand Total	£15.2m	£23.1m	93	£120.5m	£237.1m	258	£61.3m	£98.1m	271	£197.1m		£358.2m		617	
% of respective totals	7.7%	6.4%	15.1%	61.1%	66.2%	41.8%	31.1%	27.4%	43.9%						

	East Sussex			Essex			Kent & Medway			TOTAL		
	Sum of Award Offered	No. businesses / orgs	Funding per business / org	Sum of Award Offered	No. businesses / orgs	Funding per business / org	Sum of Award Offered	No. businesses / orgs	Funding per business / org	Total Award Offered	Total No. businesses / orgs	Average funding per business / org.
Small & Medium Enterprises	£14.4m	22,875	£630	£44.5m	65,855	£676	£43.3m	63,670	£680	£102.2m	152,400	£671
Large businesses		35	£ -	£57.7m	145	£397,628	£4.3m	160	£26,860	£62.0m	340	£182,217
Total businesses	£14.4m	22,910	£629	£102.2m	66,000	£1,548	£47.6m	63,830	£746	£164.2m	152,740	£1,075
Total all org types	£15.2m	23,015	£662	£120.5m	66,520	£1,812	£61.3m	64,230	£955	£197.1m	153,080	£1,287



Key takeaways:

The figures in the tables refer to the Innovate UK grant **offered**, not the Innovate UK grant spent. This is important because projects can last **up to 3 years** and as such is **not all spent in the year that the grant is offered**. In addition, projects often **underspend**, leading to a discrepancy between the amount offered and the amount spent. A final caveat is that **organisations sometimes withdraw from projects** or the **grant itself can be withdrawn**, again leading to small mismatches in the amount offered and the amount spent.

Small and medium-sized enterprises (SME) funding per business/org is **strikingly consistent** across the three areas despite the **differing number** of businesses and organisations. SMEs comprise of **86%** of the beneficiaries, enabling serious **small business innovation** within the region. Perhaps the most important takeaway given how most businesses in the SELEP region fall under this category.

Essex's large businesses have been awarded **significantly more** funding than the other two areas, explaining Essex's higher overall amount of Innovate UK funding. Conversely East Sussex's **lack of** large businesses explains their **lower** overall funding amount.

Row 4 of the third table includes businesses of all sizes as well as public sector organisations – **notably universities**. Hence the **larger** difference in the Essex, Kent and Medway figures. Due to the **increasingly diverse** nature of the businesses and organisations included in this row, **broad analysis is difficult**. Hence partners may wish to access the data directly on the Innovate UK website, available [here](#).

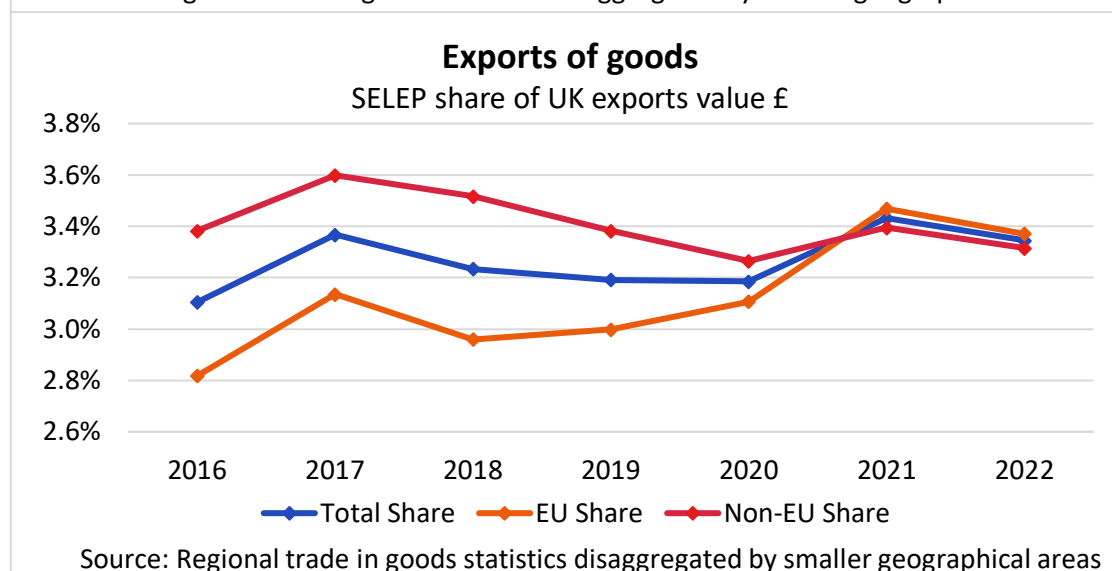
Innovate UK is **not the only source of public funding** for R&D, but its open data is a useful indicator of levels of innovation activity.



Businesses based in the SELEP area exported goods to the value of **£11.2 billion** in 2022, of which **£5.8 billion (52%)** was to the **EU**. Total exports **increased** by **16.8%**, with a **19.1% increase** in EU exports and a **14.3% increase** in Non-EU exports.

The export of goods from SELEP accounted for **3.3%** of total UK exports in goods in 2022, **down 0.1%** on 2021 despite the nominal gains. For the UK, the total value of exports of goods **increased** by **19.9%** in 2022 with EU exports **increasing** by **22.6%** and Non-EU exports **increasing** by **17.1%**.

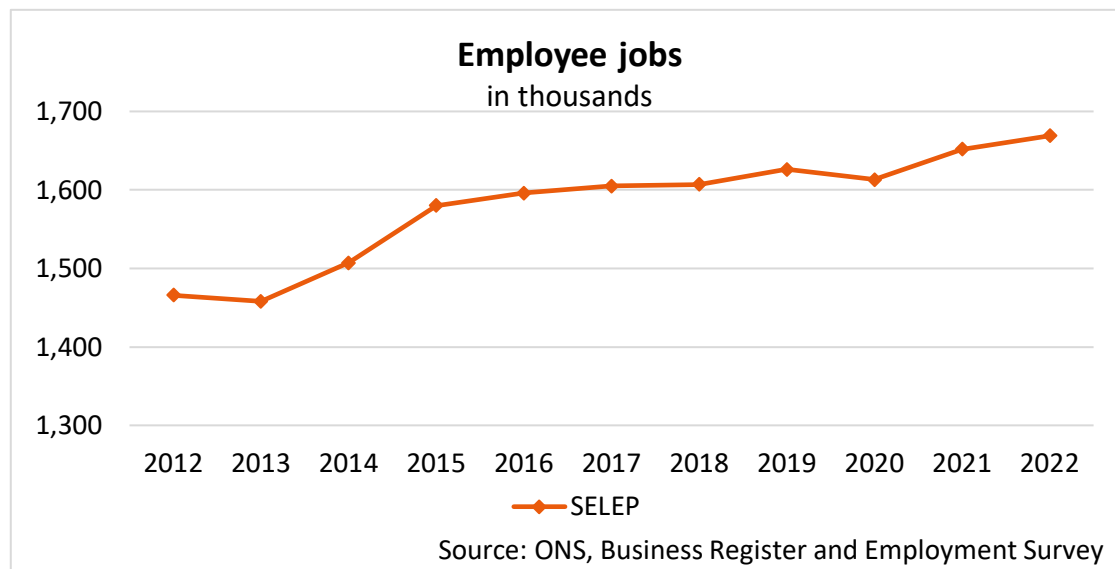
The data as published does not identify how many businesses export both to the EU and elsewhere, but we might expect that a business engaged in exporting goods will seek to trade both in the EU and elsewhere. **Essex Thames Gateway** exported the **most** to the EU in 2022 with a total value of **£1.1 billion** and **West Kent** had the most exporters to the EU with **1,108** businesses. Essex Haven Gateway, West Essex, West Kent and East Sussex CC all had **over 1,000** EU exporting businesses. **Essex Thames Gateway** also exported the **most** outside of the EU with **£1.3 billion** in 2022 and **East Sussex CC** had the **most** exporters outside of the EU with **906** businesses. West Kent, Essex Haven Gateway, and West Essex all had **more** than 800 non-EU exporting businesses.



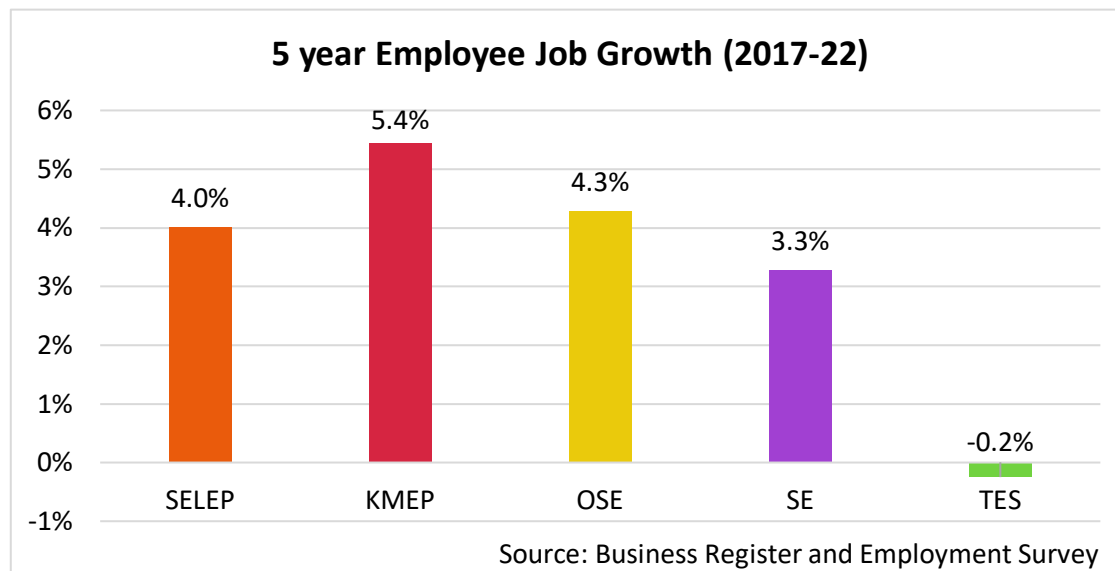


Employee jobs

Data from the Business Register and Employment Survey (BRES) recorded an estimated **1,669,000 employee jobs** across SELEP in 2022. There was an estimated **4% growth** in employee numbers over the previous five years, representing **64,400 more jobs**.



Growth was **highest** in **KMEP** at **5.4%** over five years and **lowest** in **TES** where there was a **0.2% contraction**. At a local authority level, **Dartford, Folkestone and Hythe, Tendring, Thurrock and Tonbridge and Malling** all saw **growth** of **more than 10%** over five years, while employee jobs number **fell** in **Braintree, Brentwood and Sevenoaks** by **more than 5%** in the past 5 years.

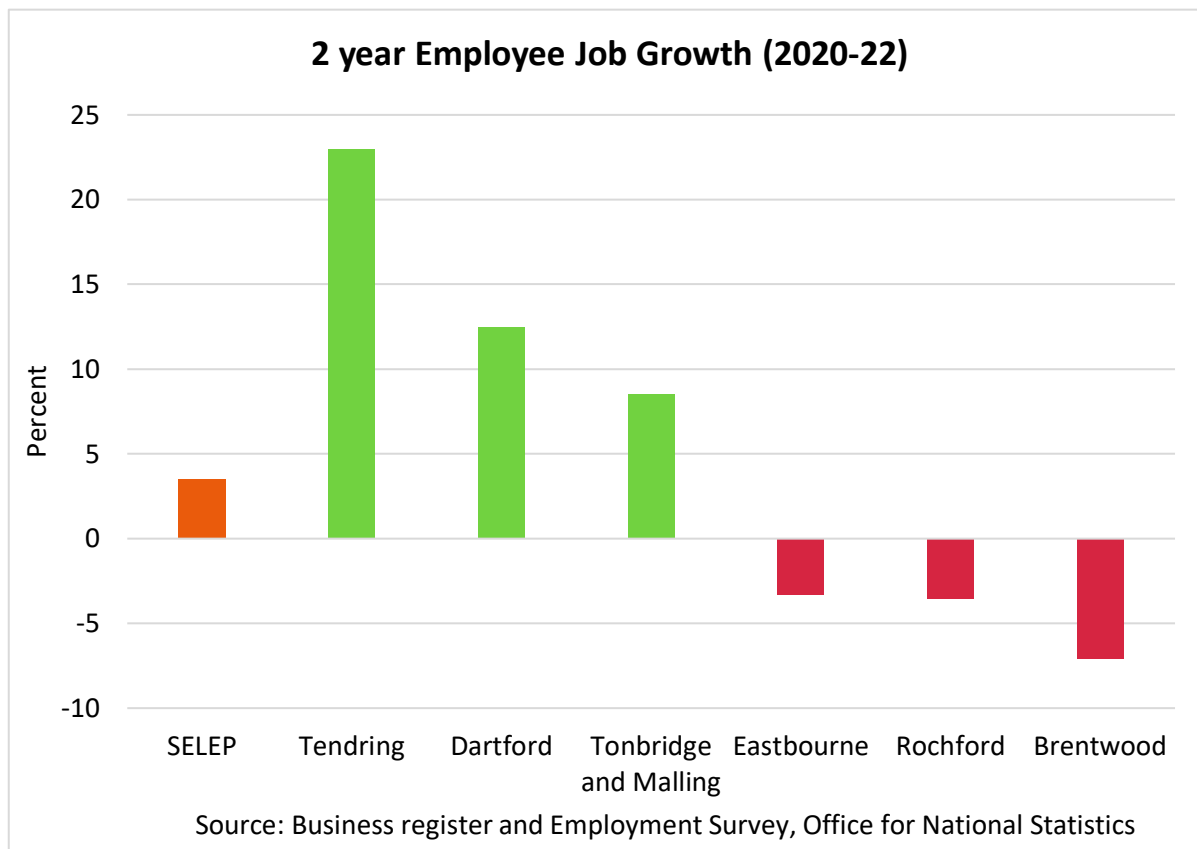




In the 2 years since 2020, Ashford, Basildon, Dartford, Dover, Epping Forest, Folkestone and Hythe, Swale, Tendring, Tonbridge and Malling and Uttlesford all saw employee job growth of over 5% suggesting these places have benefited from economic change over the course of the pandemic with Braintree, Brentwood, Castle Point, Eastbourne and Rochford all having net job losses.

The largest employment sectors across SELEP are Health, Retail and Education which together provide 32.4% of total employee jobs. In the last five years the number of jobs has increased most in Transport and Storage, Construction, Accommodation and Food Services and Public Administration. Over the same time the number of Retail jobs has reduced by 10,000 with losses also in Professional, Scientific & Technical, Education, Health, Manufacturing, Arts, Entertainment & Recreation and Information & Communication.

Compared to England as a whole, SELEP has a lower share of employee jobs in Accommodation and Food, Professional, Scientific & Technical, Arts, Entertainment & Recreation, Financial & Insurance and Information & Communication. SELEP instead has higher shares of employment in Health, Retail and Manufacturing.



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. Sectors are explored in more detail [here](#).



Table 1 - SELEP Employee jobs

Industry (broad industrial sectors)	2017	2022	5 Year Growth	2022 share of total
Health	228,000	224,000	-4,000	13%
Retail	175,000	165,000	-10,000	10%
Education	156,000	151,000	-5,000	9%
Business administration & support services	133,000	144,000	11,000	9%
Accommodation & food services	118,000	134,000	16,000	8%
Construction	107,000	125,000	18,000	7%
Professional, scientific & technical	112,000	105,000	-7,000	6%
Transport & storage (inc. postal)	83,000	104,000	21,000	6%
Manufacturing	106,000	102,000	-4,000	6%
Arts, entertainment, recreation & other services	77,000	74,000	-3,000	4%
Public administration & defence	56,000	70,000	14,000	4%
Wholesale	68,000	68,000	0	4%
Financial & Insurance	42,000	49,000	7,000	3%
Information & communication	45,000	44,000	-1,000	3%
Motor trades	35,000	39,000	4,000	2%
Property	26,000	29,000	3,000	2%
Mining, quarrying & utilities	17,000	21,000	4,000	1%
Agriculture, forestry & fishing	19,000	19,000	0	1%
Total	1,603,000	1,667,000	64,000	

Source: ONS, Business Register and Employment Survey

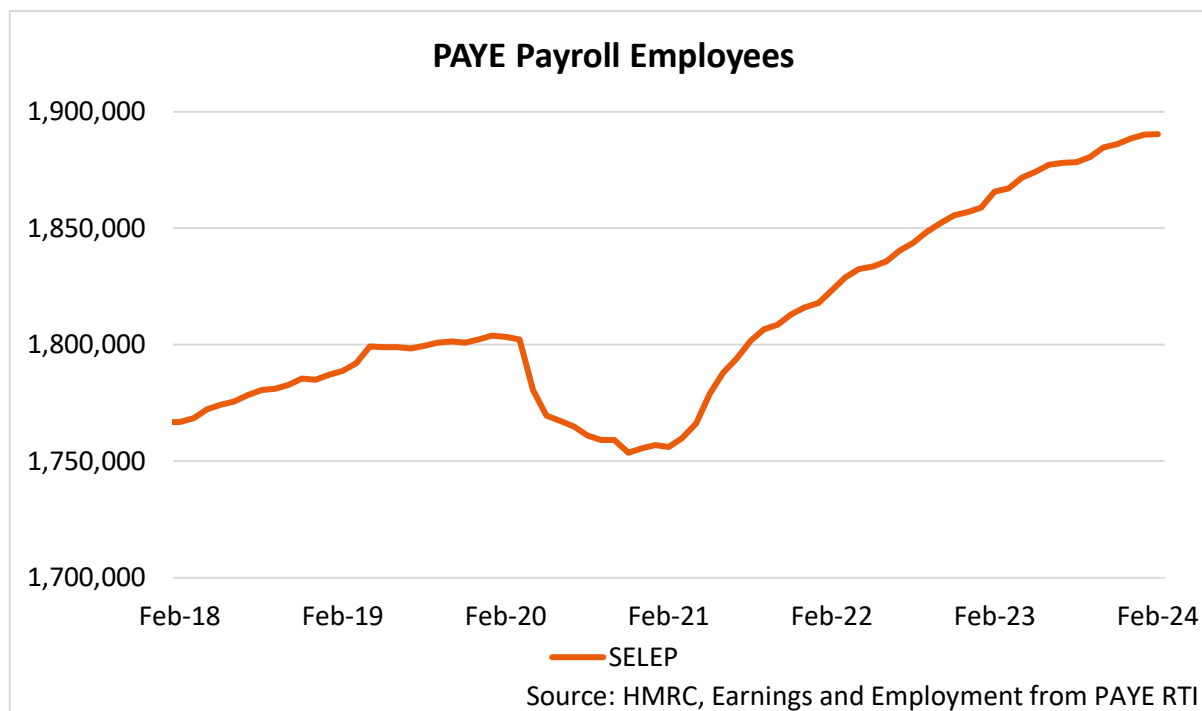


PAYE employee jobs

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 February 2024 there were **1,890,000 payrolled employees** living in SELEP, and in September 2022, some **1,849,700**, 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 must commute elsewhere to find work.

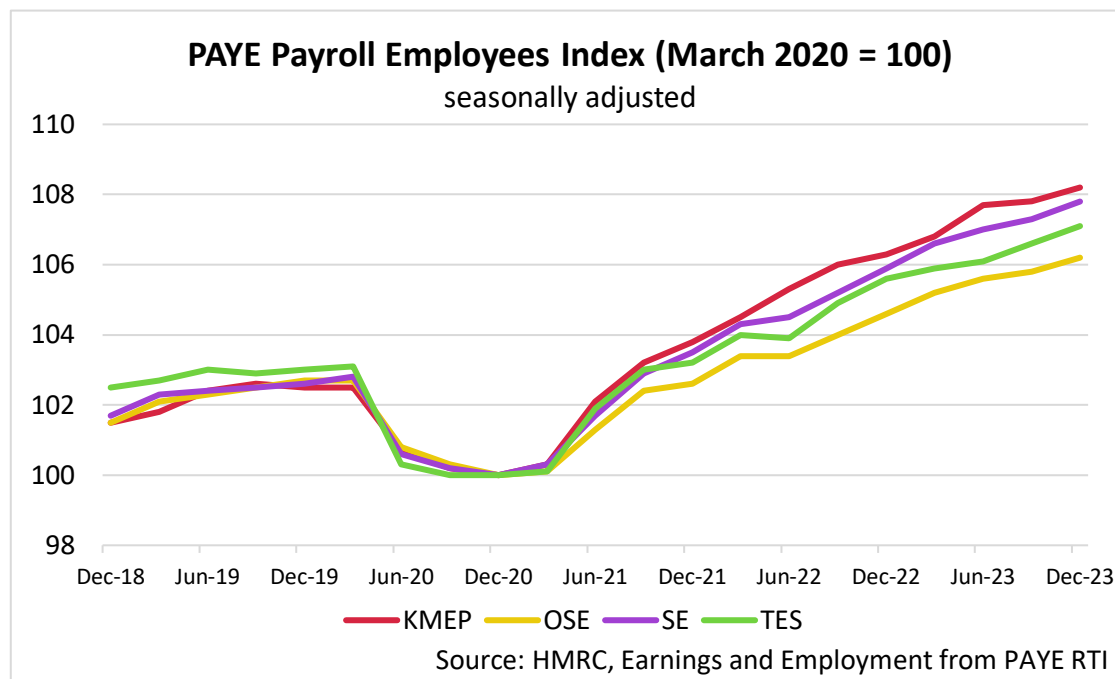
Resident employee jobs in SELEP **grew** at a rate of **1.7%** during 2023, compared to a rate of **2.2%** in 2022 and **significantly behind** the national UK job growth of **3.7%**. Resident employee jobs **grew** at a rate of **7.6%** in the past 3 years (2021-2024), slightly **below** the UK rate of **7.9%** during this period. However over five years (2018-2024) SELEP has a job growth rate of **5.8%** compared to UK growth of **5.5%**. 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 three years**.





At a Federated Area level, **KMEP** had the **strongest** employee **growth** of **6.5%** over five years. **SE** has had similar but **slightly lower** growth at **6%**. **TES** and **OSE** had **below** national growth during that period, with **4.5%** and **4.7%** respectively. In the last 3-year period (2021-2024), only **KMEP** had a growth rate **above** the national average. In 2023, **KMEP**, **OSE** and **SE** had a growth rate **above** the national average.

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** such as **Hastings**, **Rother**, **Castle Point**, **Folkestone** and **Hythe** and **Thanet** which all had rates between **2.9%** and **3.5%**. In 2023 **Medway**, **Eastbourne**, **Colchester**, **Ashford**, **Dartford** and **Maidstone** had a growth rate **above 5%**. **Hastings**, **Castle Point**, **Tendring**, **Sevenoaks**, **Folkestone** and **Hythe**, **Thanet** and **Tonbridge** and **Malling** had the lowest rates of **less than 3%**.



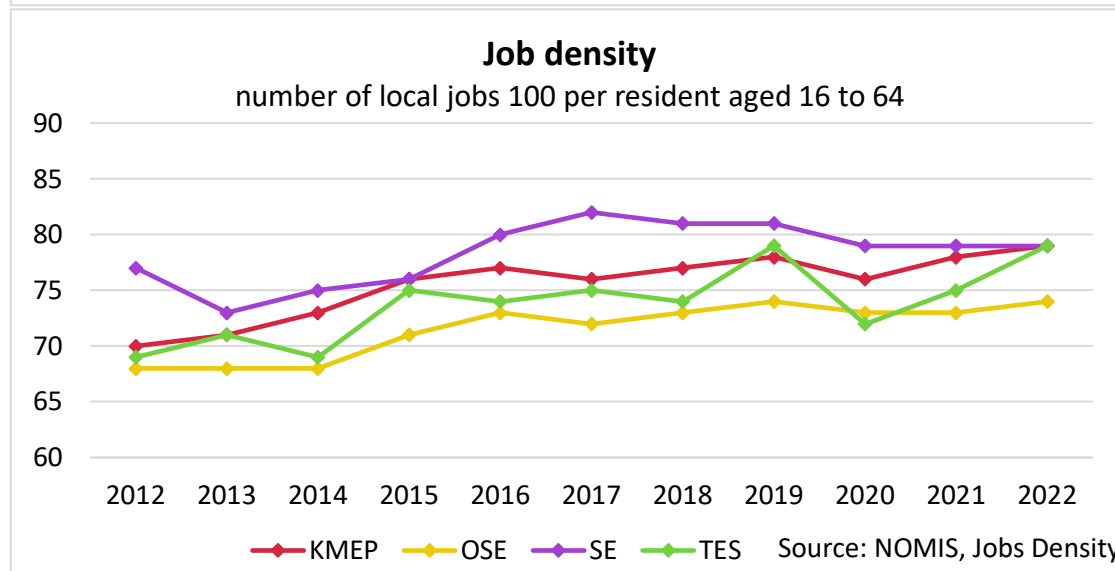
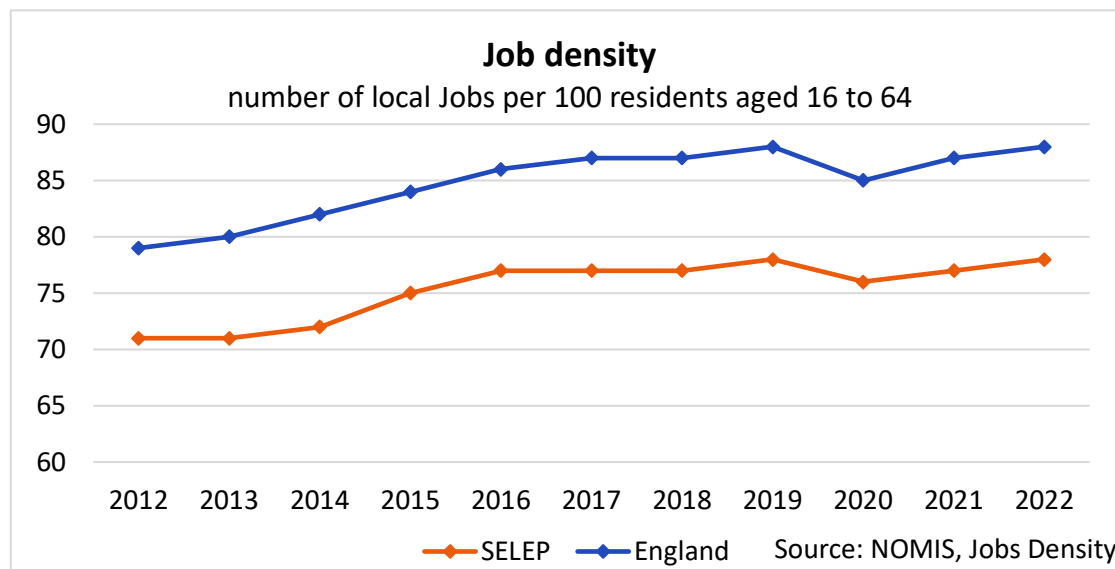


Job density

This 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 2022 was **88 jobs per 100 working age residents**, reflecting that **not all people are economically active**. For the SELEP area the figure was **78**, 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 **79** in 2012, 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.

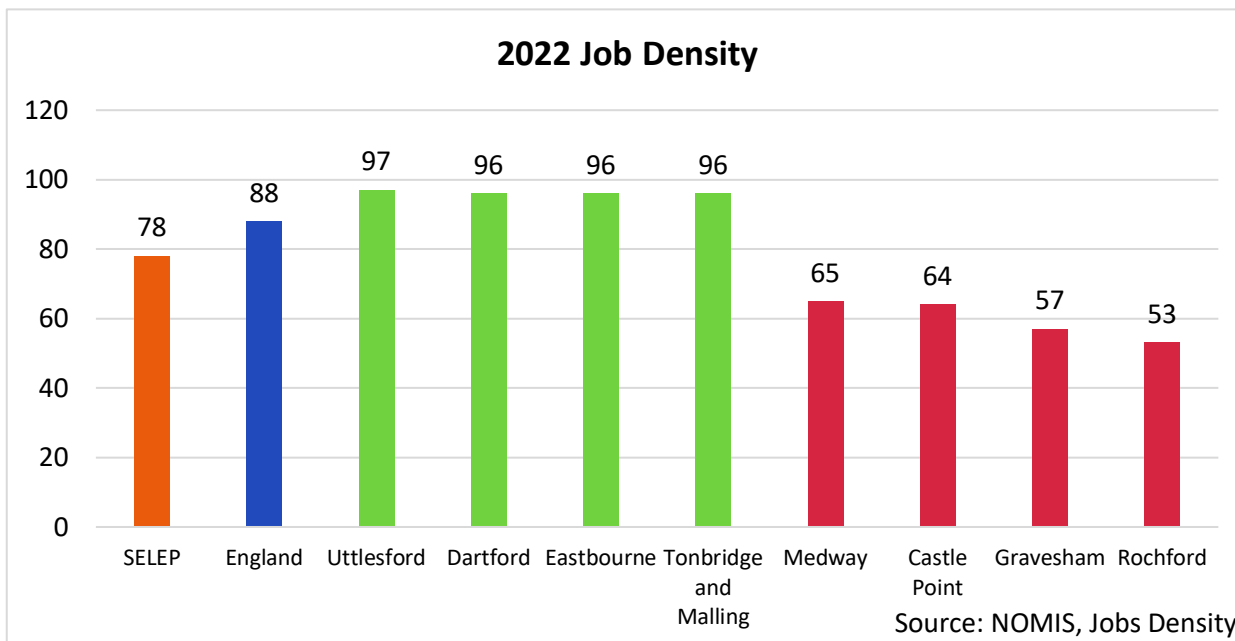
Current job densities across Federated Areas have **converged** at **79 jobs per 100 working age residents** in **KMEP, SE and TES** in 2022. **OSE's** job density has almost always been the **lowest** within SELEP and was **74** in 2022. All areas are **below** national average, with dependency on commuting to London or elsewhere for jobs a **common issue**.





Only **nine** local authority areas across SELEP are considered to be **net inward commuting** areas, where **job density is above the national average**. In 2022 these were **Uttlesford, Dartford, Eastbourne, Tonbridge and Malling, Sevenoaks, Tunbridge Wells, Chelmsford, Ashford and Canterbury**. 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.

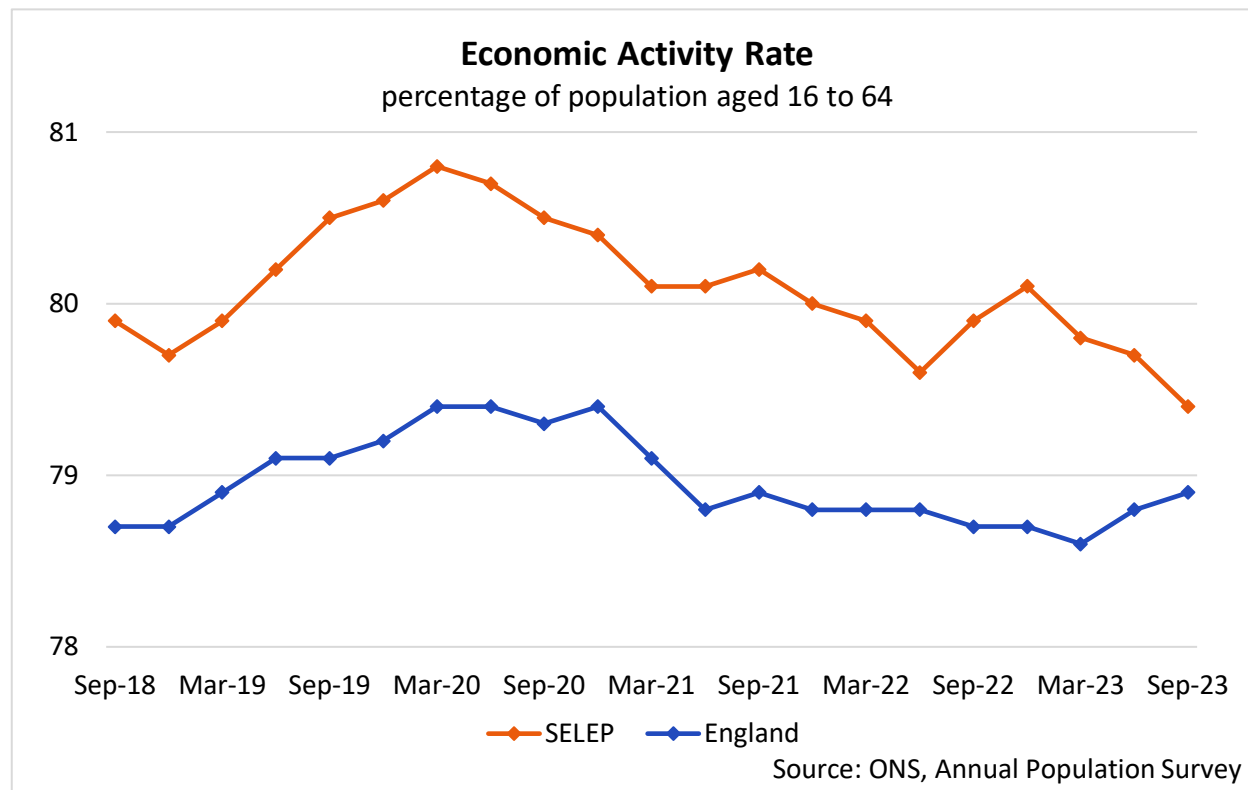
In SELEP, job density gets as **low** as **53** in **Rochford**, which is one of the **lowest** in the country, with **Gravesham, Castle Point and Medway** having a job density of **65 or below**. The list of local authorities with the lowest job density has **hardly changed** since 2011, with **Dover** previously on the list, but still with very low job density.





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.



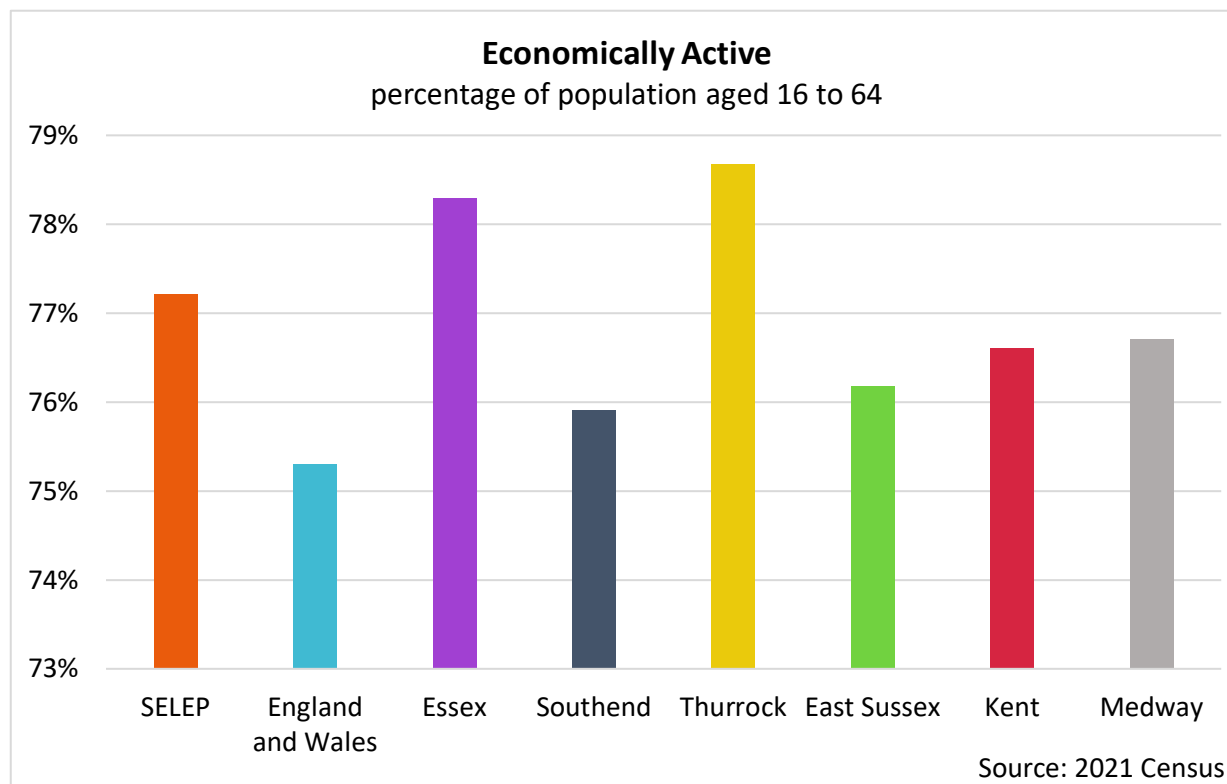


Census 2021 results provide reliable local estimates for economic activity for the first time since the 2011 Census. The results of the Census were however impacted by the **pandemic** and with many people of furlough, and so **will not reflect normal circumstances**.

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 had been **falling** nationally and for SELEP after September 2020, however SELEP saw an **increase** at the end of 2022 before **falling** once again. In September 2023 SELEP was still estimated to have self-employment rates **1.7 percentage points above** the national average, but the rate has **fallen** to about **15.1%** of working age people in employment, having **fallen** by **1.3%** since December 2022. It should be noted that these figures are not directly comparable to the Census, with the Census estimating lower rates of self-employment than the APS.





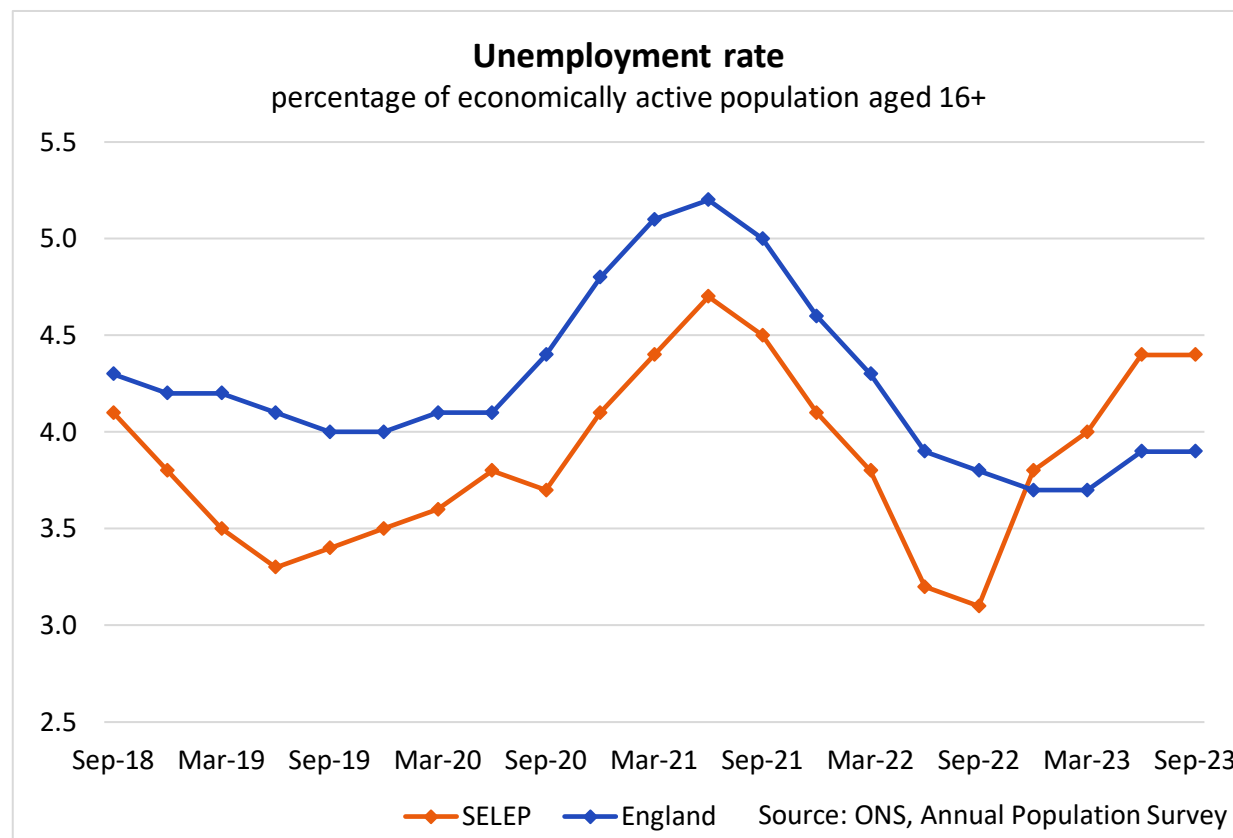
Unemployment rate

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**. However, since then unemployment has **risen significantly** and is now **above** the national rate. The percentage of economically active population who were unemployed was **4.4%** for SELEP compared to **3.9%** for England in the year up to September 2023. Unemployment rates for SELEP had 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 in 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**.



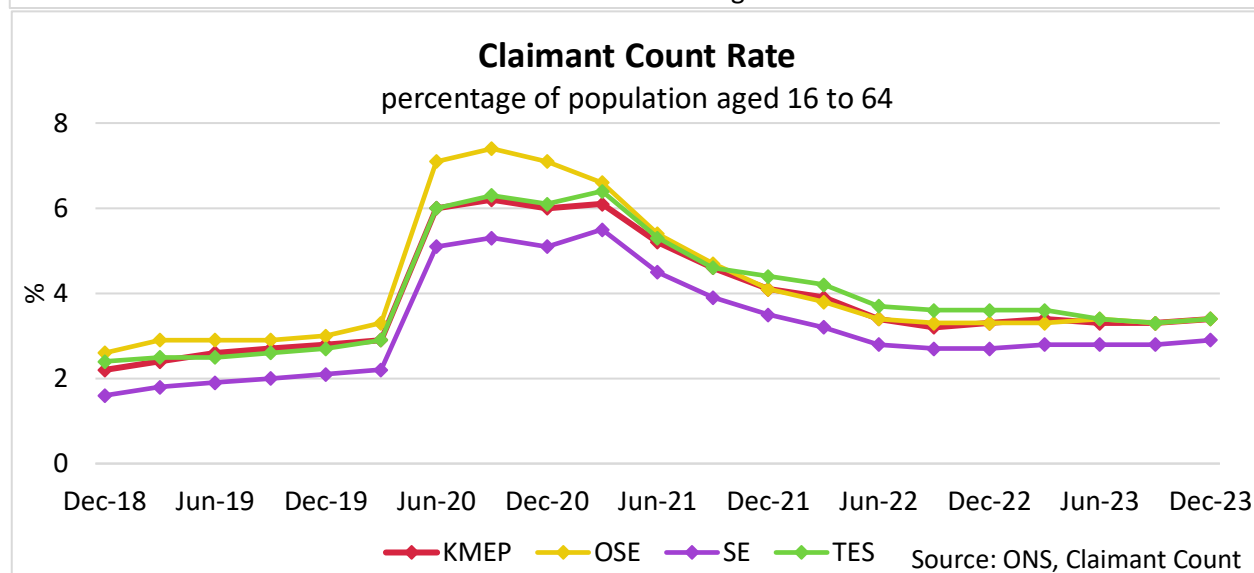
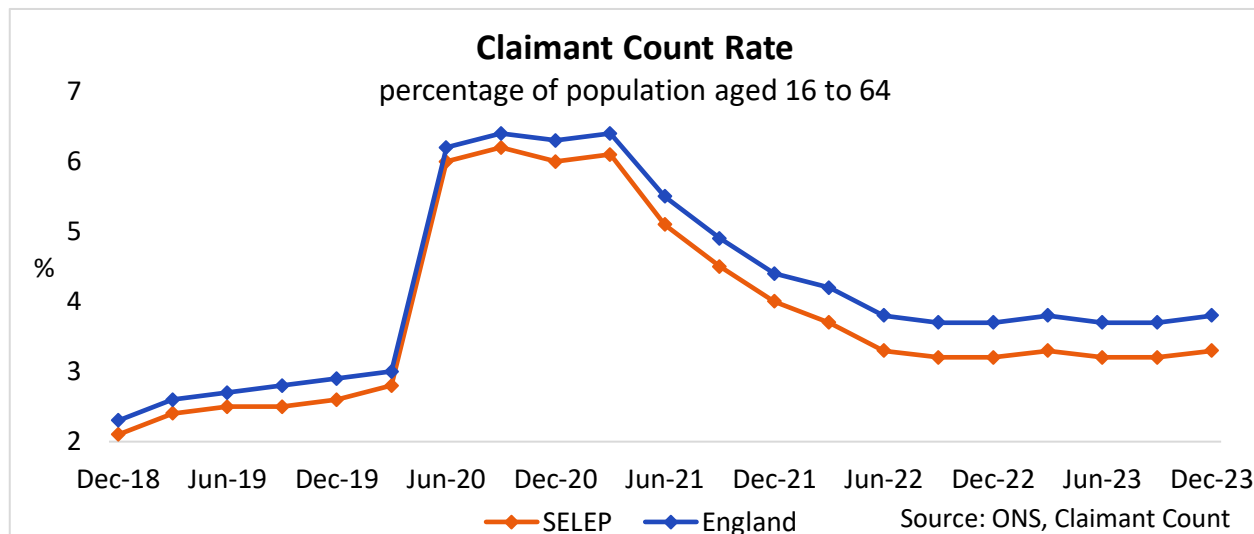


Claimant rate

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 2023.

The claimant rate for SELEP is **lower** than the national rate and is **lower** than the national average in all Federated Areas. In the year leading up to December 2023, the claimant count rate **converged** to 3.4% in KMEP, OSE and TES, whilst being 2.9% in SE.

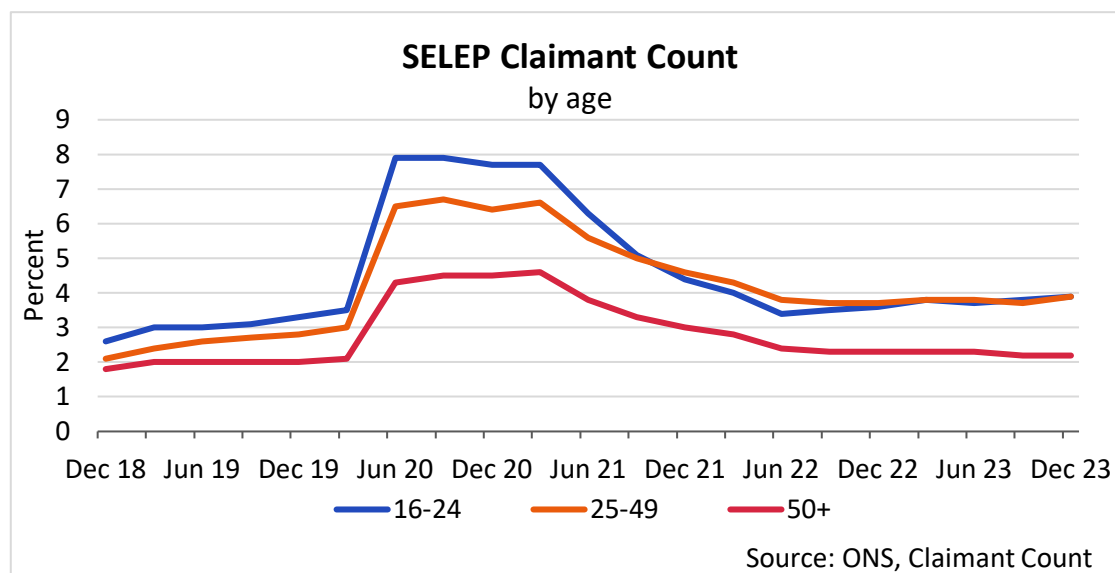
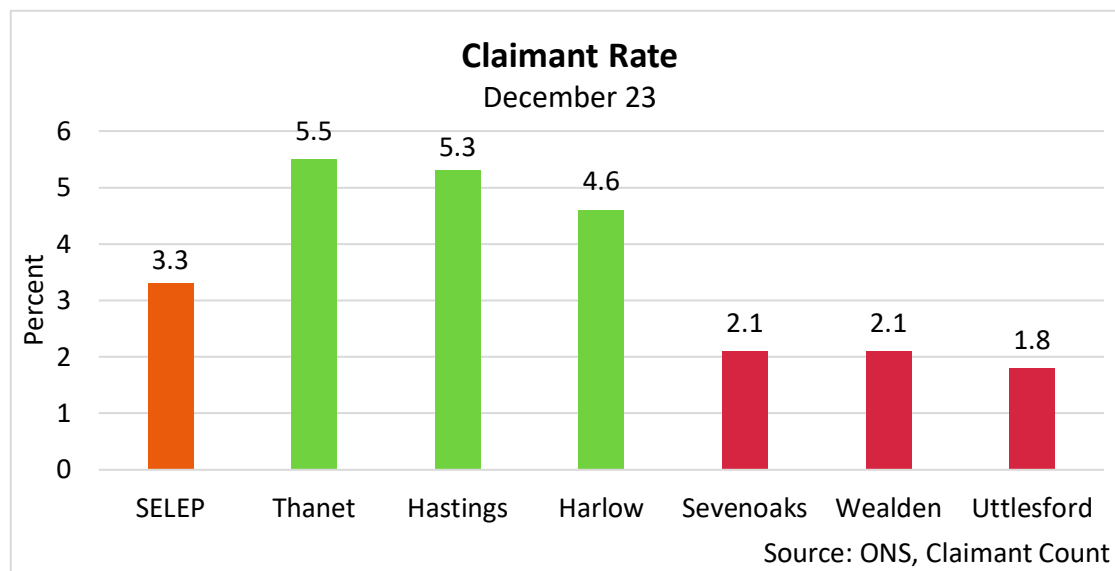




At a local authority level within SELEP the claimant rate is **highest** in Thanet at 5.5%, with **relatively high** rates also in Hastings, Harlow, Eastbourne, Southend-on-Sea, Gravesham, Tendring and Thurrock. The local authority with the **lowest** claimant rate was Uttlesford at 1.8% in December 2023, followed by Wealden, Sevenoaks, Rochford, Tonbridge and Malling and Maldon.

Over the last 5 years, the local authorities with the **largest increase** in the claimant rate are Gravesham, Maidstone, Lewes, Thurrock, Dartford and Epping Forest. The local authorities with the **smallest increase** during this period are Thanet, Tendring, Dover, Hastings and Swale.

There has been previous concern that the claimant rate was higher for younger people, but this position **changed** in December 2021 and since then the 16-24 and 25-49 claimant rates have been almost identical. In December 2023 the claimant rate for those aged 16 to 24 was 3.9%, which was **also** the case for those aged 25-49. The claimant rate for people aged 50 and above has always been **lower** and was 2.2% in December 2023.





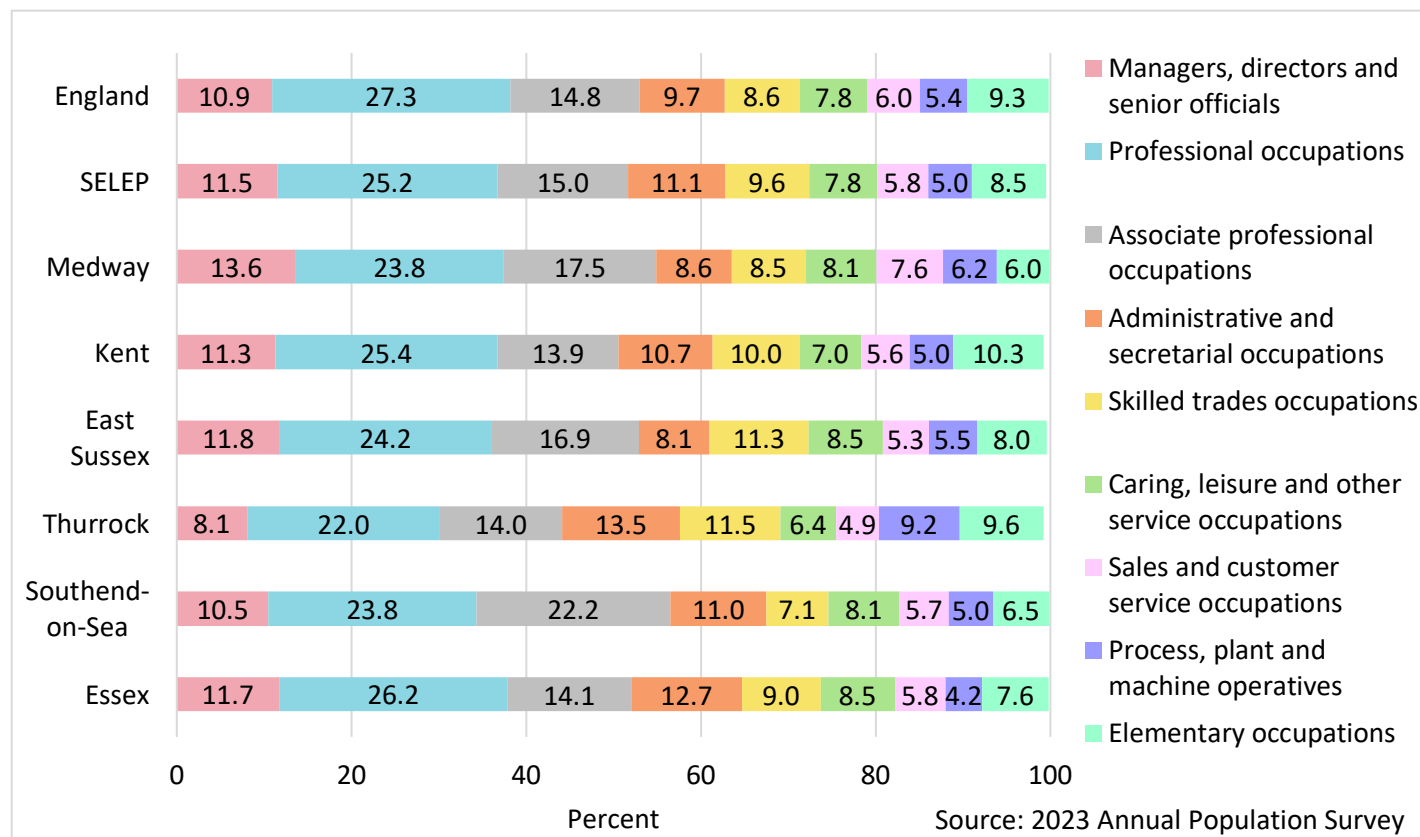
Employment Profile

This chart shows the **composition of employees** in the SELEP region compared to the national composition using data from the 2023 Annual Population Survey.

The **largest discrepancy** between the SELEP region and the national proportions is in the proportion of **Professional occupations**, where SELEP is **2.1% below** the national value.

The other occupation groups where SELEP is below the national proportions are **Process, plant and machine operatives** (0.4% **lower** in SELEP), **Elementary occupations** (0.8% **lower** in SELEP) and **Sales and customer service occupations** (0.2% **lower** in SELEP).

This is offset by SELEP having a **higher** proportion of **Skilled trade occupations** (1.0% **higher** in SELEP), **Managers** (0.6% **higher** in SELEP), **Administrative and secretarial occupations** (1.4% **higher** in SELEP) and **Associate professionals** (0.2% **higher** in SELEP).





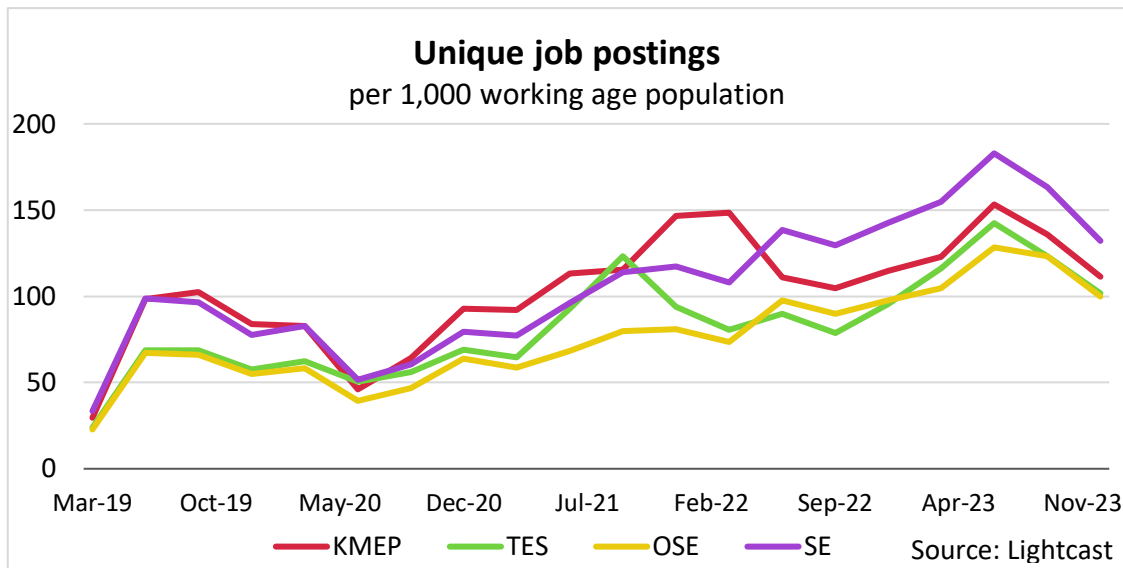
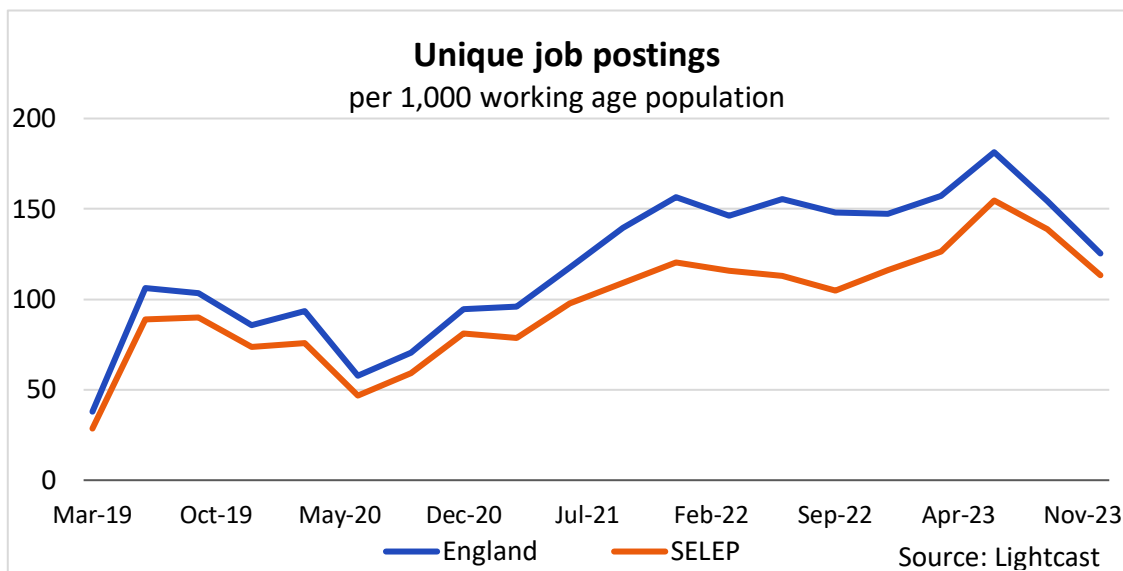
Online job postings

The number of online job postings reached a **record high** in the Q2 2023 with **400,132** postings in the SELEP region, equating to **155 postings per 1,000 working age population**. In Q4 2023 there were **292,861** new job postings across the SELEP area, which was **113 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 **125 postings per 1,000 working age population** in Q4 2023.

Across Federated Areas in Q4 2023, online job postings per 1,000 working age population were **higher** than the national average for **SE** at **132**. The other federated areas had below average postings in Q4 2023: **KMEP (111)**, **TES (102)**, **OSE (100)**. Previously job postings were at a **similar** level for **SE** and **KMEP**, with **KMEP** frequently having **higher** levels, but since Q2 2022 SE has had a **higher** value.

At a local authority level, we find that **Chelmsford, Harlow, Dartford, Colchester, Brentwood and Maidstone** have the **highest** online job postings relative to the size of the local working age population, all **consistently above** national average over time and with a value between **150 and 190** in Q4 2023.

At the other end of scale, some local authorities within SELEP have **low** levels of online job postings, **below 80 per 1,000 working age population** and in the last quarter of 2023 this included **Thanet, Maldon, Gravesham, Folkestone and Hythe, Rochford, Tendring, Rother and Castle Point**.

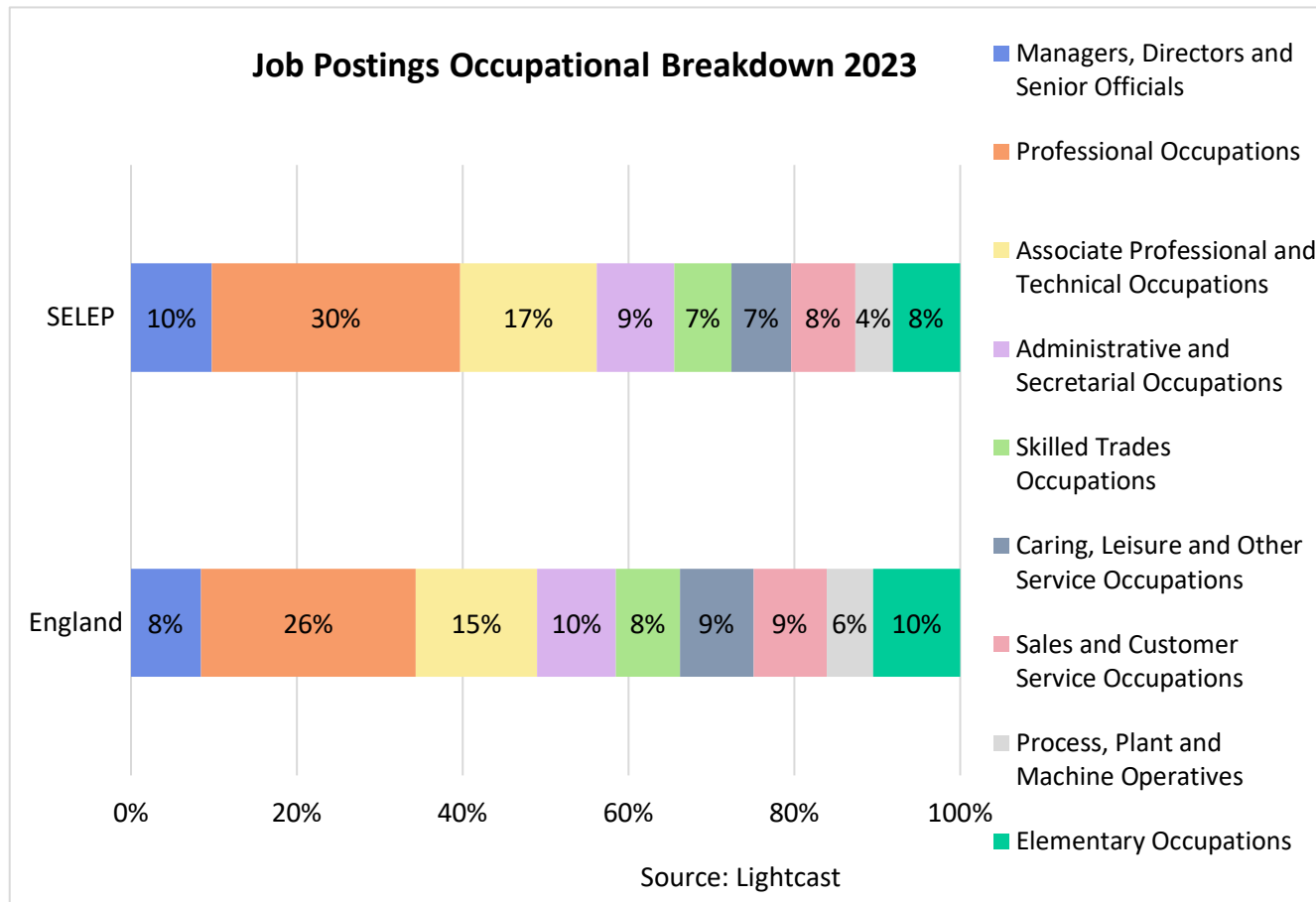




In SELEP 2023 the share of online job postings in **higher occupational groups (directors, professional and technical occupations)** was **57%** compared to the national proportion of **49%**. SELEP saw a **lower** share of job postings across all other occupational groups.

The **most in demand** occupations at a slightly more detailed occupational level of breakdown in SELEP 2023 were **Care Workers and Home Carers, Sales Related Occupations, Cleaners and Domestic, Secondary Education Teaching Professionals, Customer Service Occupations and Other Registered Nursing Professionals.**

At the most detailed occupational level the **most in demand** specific job roles were **Office / Administrative Assistant, Home Health Aide, Registered Nurse, Janitor / Cleaner, Teacher Assistant, Customer Service Representative, Laborer / Warehouse Worker and Caregiver / Personal Care Aide.** 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.



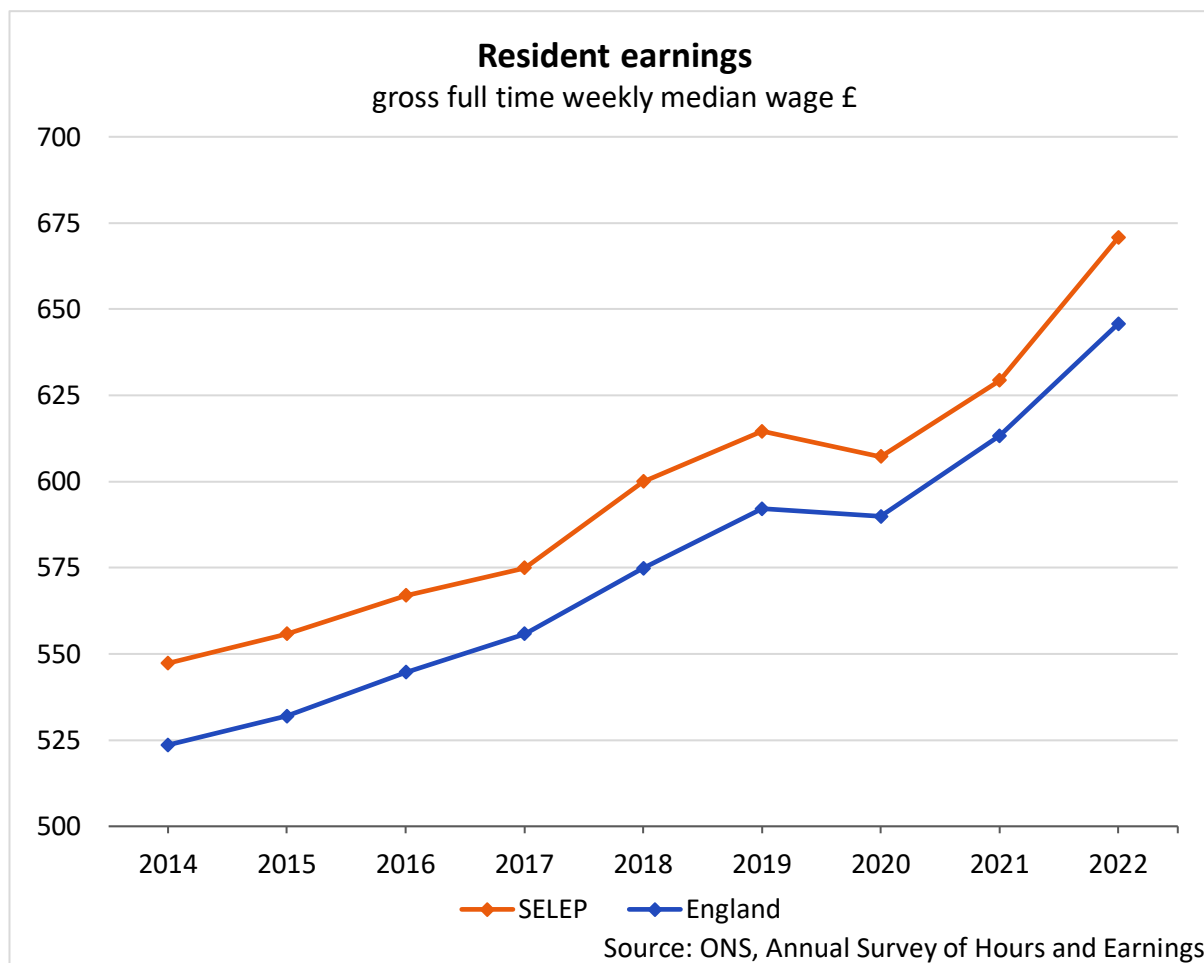


The national Annual Survey of Hours and Earnings (ASHE) provides good estimates of earnings at a LEP level, and the sample size is sufficient to give reasonable indicators of **relative wage levels** at a county level, but **not** at a local authority level. The 2023 LEP values have been delayed and thus the 2022 SELEP values will be used, however the 2023 local authority data is available and will be used.

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 **£711**, with **Kent** not far behind at between **£696** Both have **lower** wages than **London, Hertfordshire, Buckinghamshire, Oxfordshire and Hampshire**. Median full-time earnings in **East Sussex** are **much lower** at approximately **£674**, 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. With that in mind median wages for residents are **very low** in **Tendring, Thanet, Rother and Harlow**, with estimates below **£650 per week**. Weekly wages are **highest** in **Brentwood, Epping Forest and Rochford**, with estimates above **£800** in 2023.

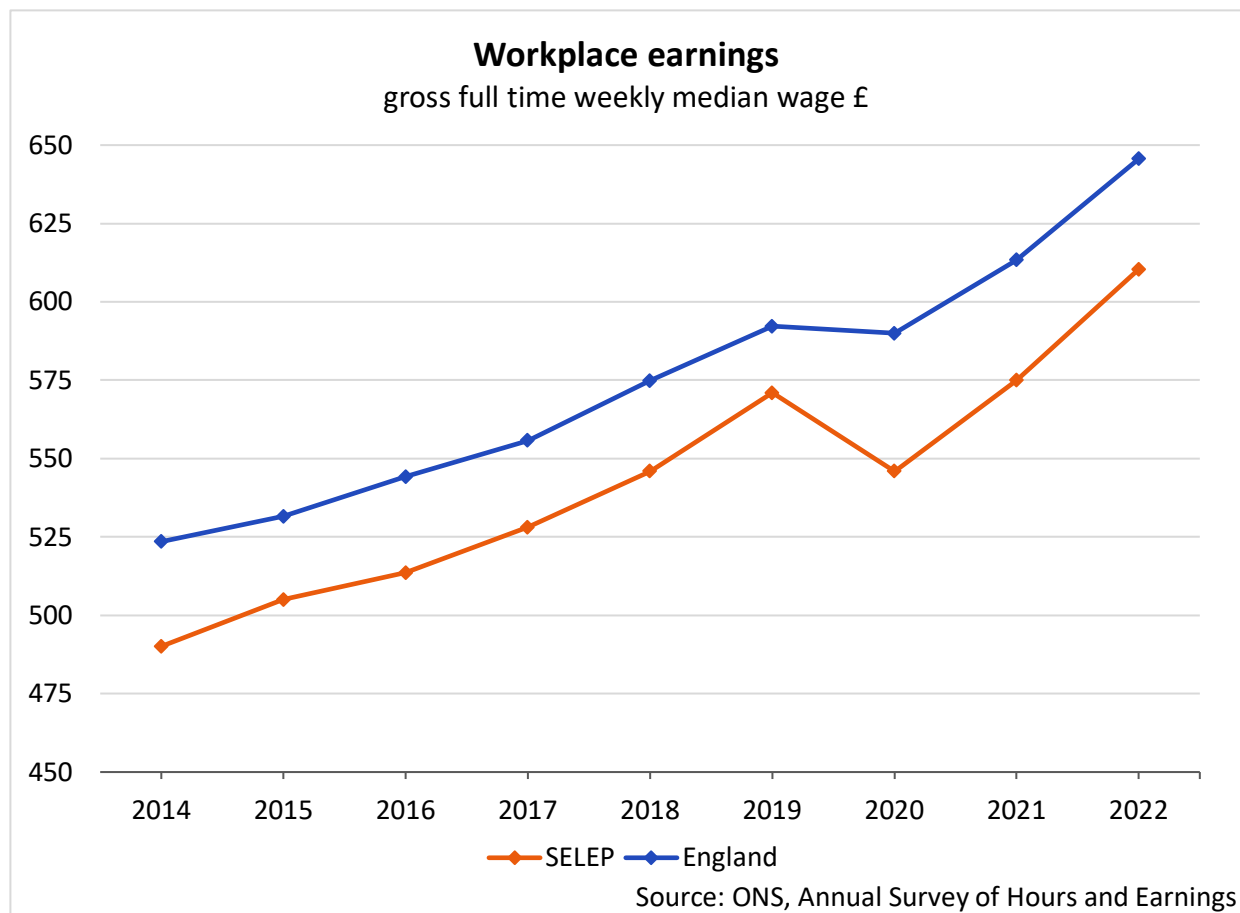




In SELEP on a workplace basis full-time median wages were estimated to be between **£603 and £618** in 2022. This is a **similar** level to median workplace earnings in **Cumbria** and **below** LEP areas in the **Midlands**.

At an English county level, **Essex** has an estimated workplace median wage of between **£658**, with **Kent** workplace earnings estimated to be **£652**. **East Sussex** had median earnings of around **£624** in 2023. 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**. However, median wages for residents are **very low** in **Thanet, Hastings, Rother and Tendring** at around **£600 per week or less**, and weekly wages are **highest** in **Gravesham, Dartford, Brentwood and Uttlesford**, in excess of **£700** in 2023.



SKILLS





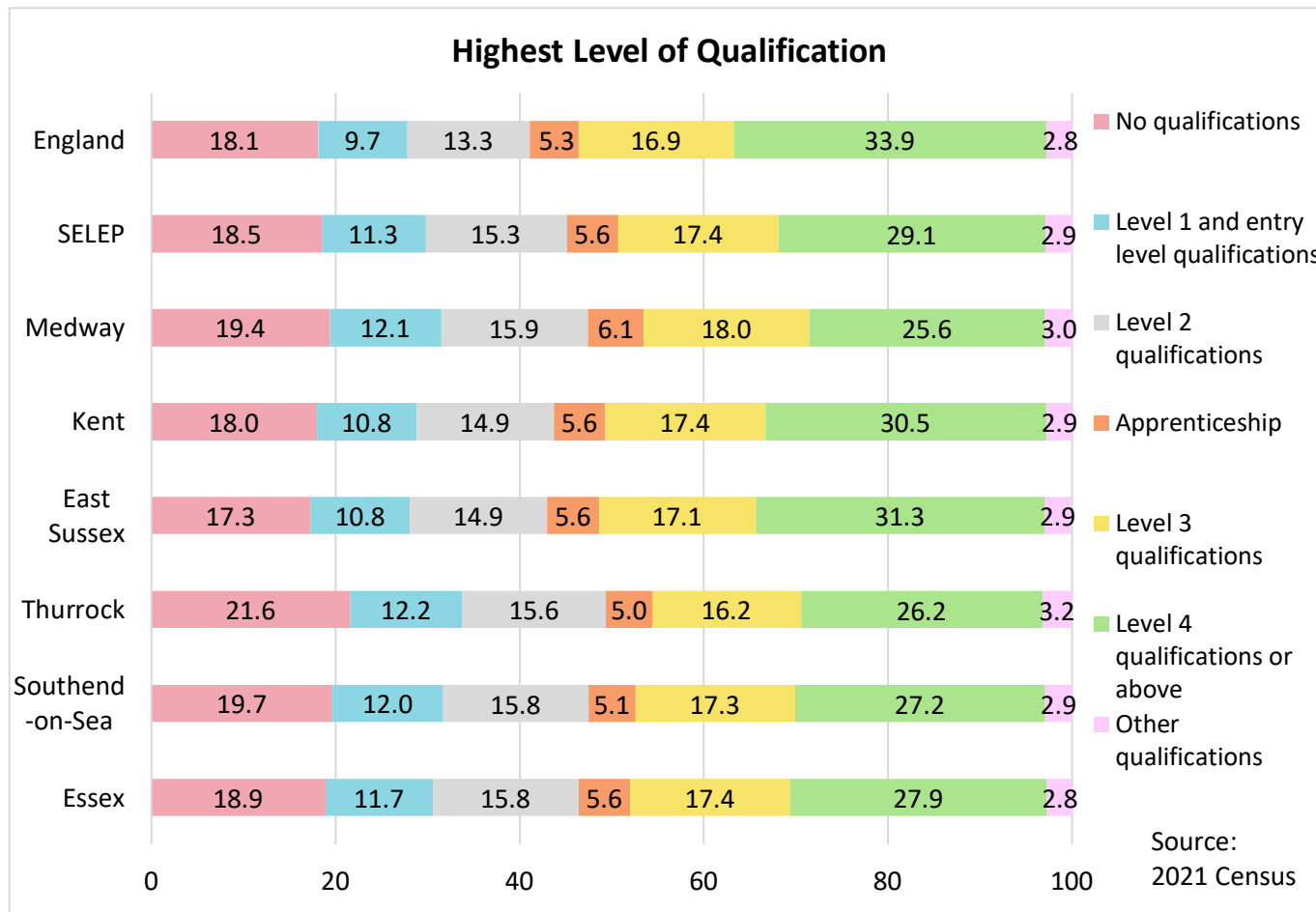
Highest level of qualification

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**).

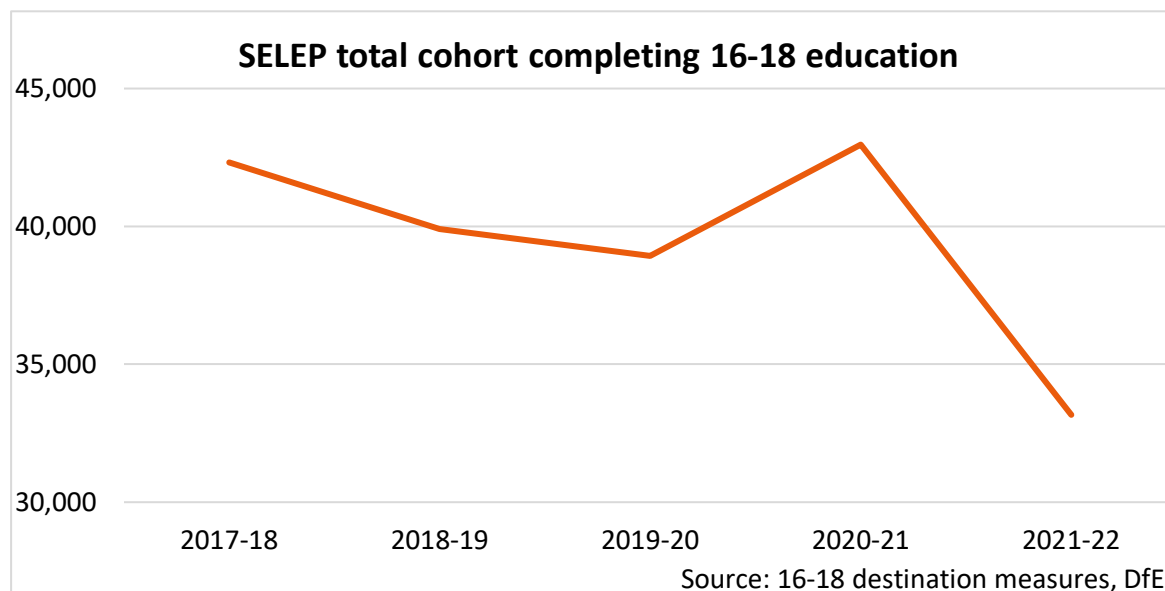




Destinations after completing 16-18 education

The Department for Education have changed the criteria for when a student is at the end of their 16 to 18 study, hence comparisons between the 2021-22 data and previous data should be made with caution. Students are no longer counted after spending two years in the same school or college and are only counted if they turn 18 in that academic year or if they enter 2 A level or equivalent qualifications that year. These changes in methodology had a disproportionately large effect on schools relative to colleges and on students studying at Level 2 and below.

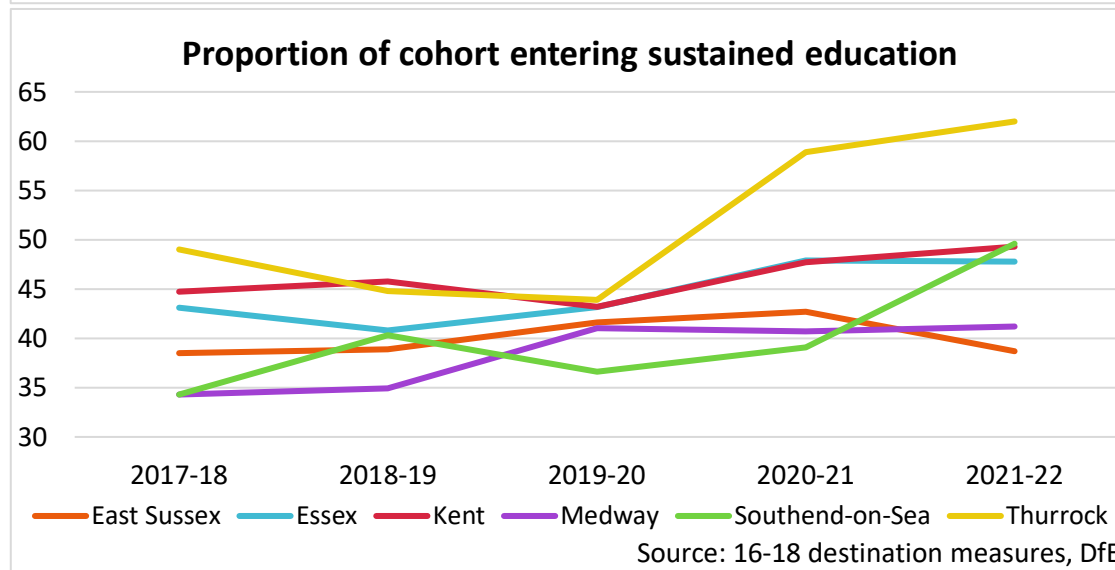
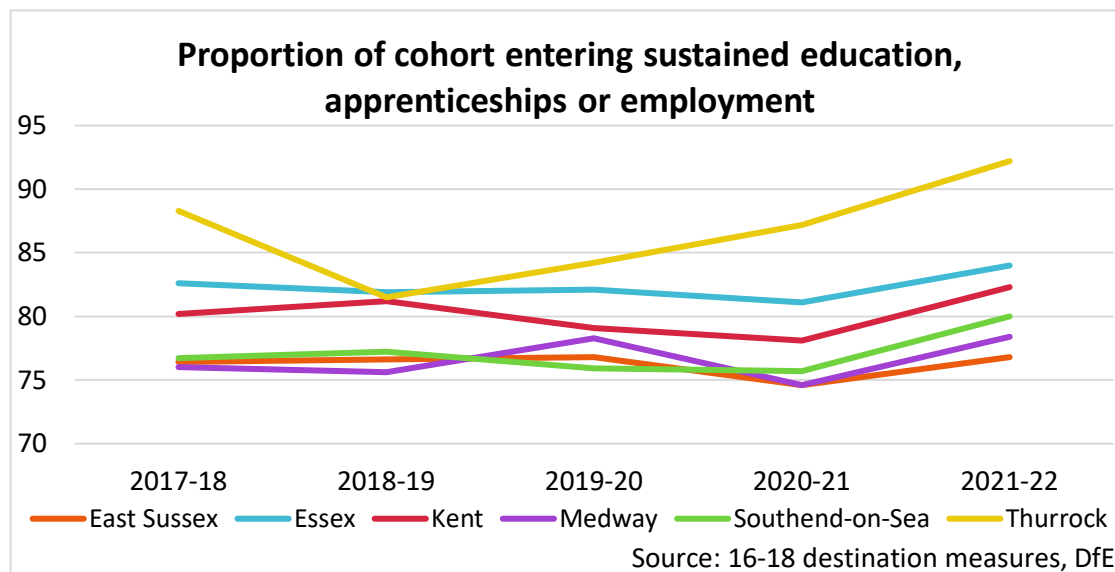
	East Sussex	Essex	Kent	Medway	Southend-on-Sea	Thurrock	SELEP
2020-21 cohort	5,005	13,233	15,524	3,689	5,155	360	42,966
2021-22 cohort	3,333	10,853	12,597	3,063	2,948	374	33,168
% change between 20-21 and 21-22	-33.4	-18.0	-18.9	-17.0	-42.8	3.9	-22.8





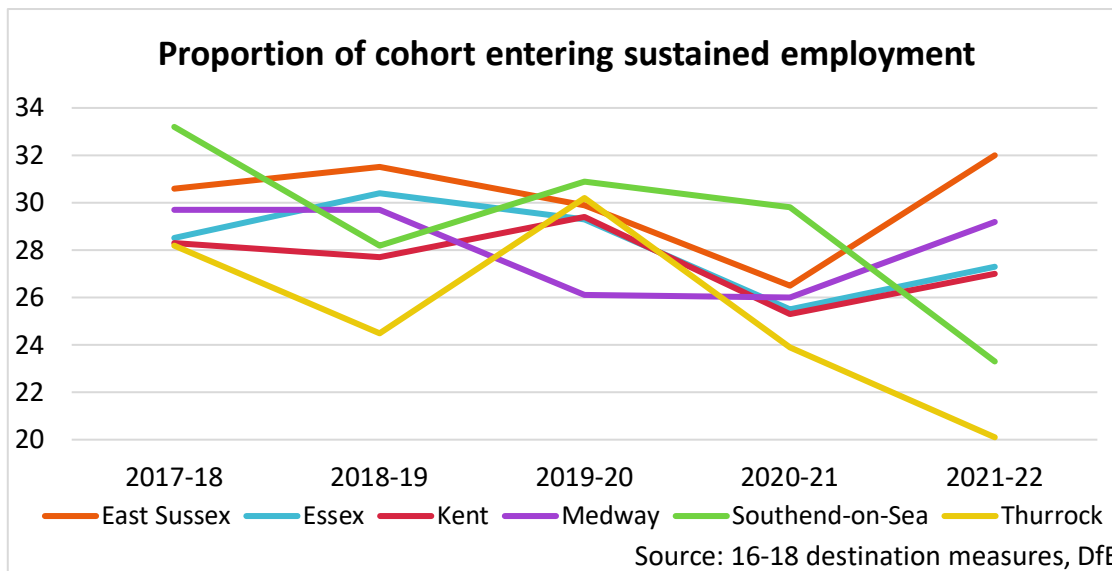
The proportion of the total cohort entering **sustained education, apprenticeships or employment** rose to **all-time highs** across the region, after **falling** in the 2020-21 cohort (except for **Thurrock**). These increases are driven by a **rise** in the number of students **entering apprenticeships and sustained employment**, as providers and employers increased staff numbers when the COVID restrictions were lifted. Across the **SELEP region** the proportion of the cohort entering one of these three destinations was **78.1%** in 2020-21 before **rising** to **81.9%** in 2021-22. Nationally, the proportion was **82.6%** in 2021-22, up on **79.4%** in 2020-21. In 2021-22 **East Sussex** had the **lowest** proportion of the cohort moving onto one of the three pathways at **76.8%** followed by **Medway (78.4%)**, **Southend-on-Sea (80%)**, **Kent (82.3%)**, **Essex (84%)** and **Thurrock (92.2%)**.

In 2021-22 the proportion of the cohort continuing down the **education pathway (Higher, Further and Other)** rose to **all-time highs** in **Kent, Medway, Southend-on-Sea and Thurrock**, but **fell** slightly in **East Sussex and Essex**. Across the **SELEP region** the proportion of the cohort continuing education **increased** to **47.2%** in 2021-22 from **45.6%** in 2020-21. Nationally, the proportion was **51.2%** in 2021-22, **down** on **51.9%** in 2020-21. There was a notable **increase** in the rate going into **Higher Education** institutions, partially due to the new grading system for this cohort, which led to overall higher grades. **East Sussex** has the **lowest** proportion of 16-18 graduates continuing their education at **38.7%**, followed by **Medway (41.2%)**, **Essex (47.8%)**, **Kent (49.3%)**, **Southend-on-Sea (49.6%)** and **Thurrock (62%)**

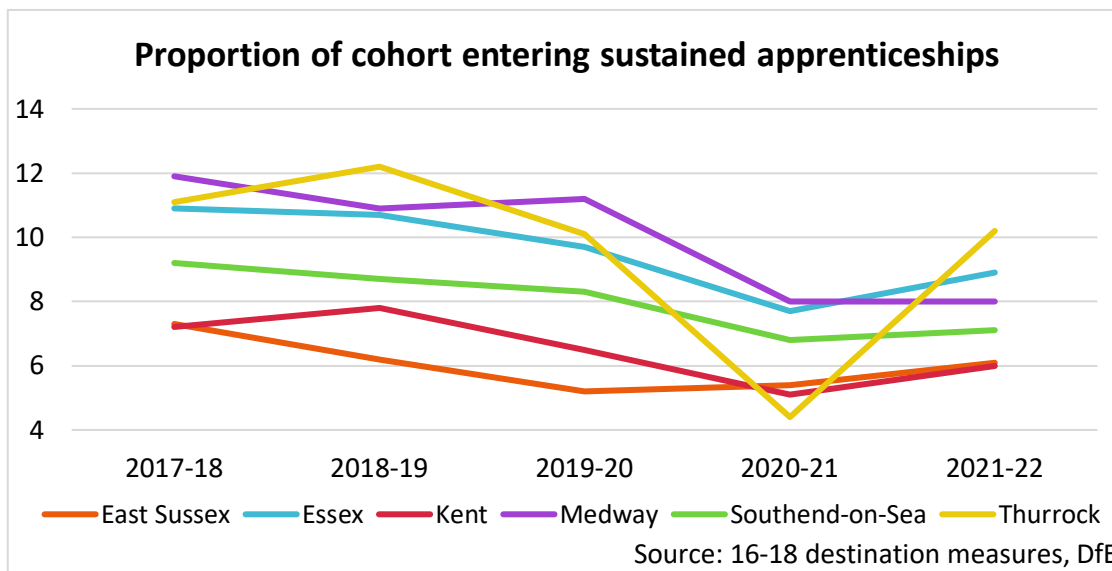




In 2021-22 the proportion of the cohort choosing to enter **employment rose** in East Sussex, Essex, Kent and Medway and fell in Southend-on-Sea and Thurrock. Across the SELEP region the proportion of the cohort entering employment **rose** to **27.4%** in 2021-22 from **26.1%** in 2020-21. Nationally, the proportion was 24.2% in 2021-22, up on 21.1% in 2020-21. Students from **East Sussex** were the **most likely** to take this route (**32%**), followed by **Medway** (**29.2%**), **Essex** (**27.3%**), **Kent** (**27%**), **Southend-on-Sea** (**23.3%**) and **Thurrock** (**20.1%**).



In 2021-22 the proportion of the cohort choosing to undergo an **apprenticeship rose** across the region **apart from in Medway where it remained the same**. Across the SELEP region the proportion of the cohort starting an Apprenticeship **rose** to **7.3%** in 2021-22 from **6.4%** in 2020-21. Nationally, the proportion was **7.2%** in 2021-22, **up** on **6.4%** in 2020-21. **Kent** had the **lowest** proportion of the cohort starting an apprenticeship (**6%**), followed by **East Sussex** (**6.1%**), **Southend-on-Sea** (**7.1%**), **Medway** (**8%**), **Essex** (**8.9%**) and **Thurrock** (**10.2%**).

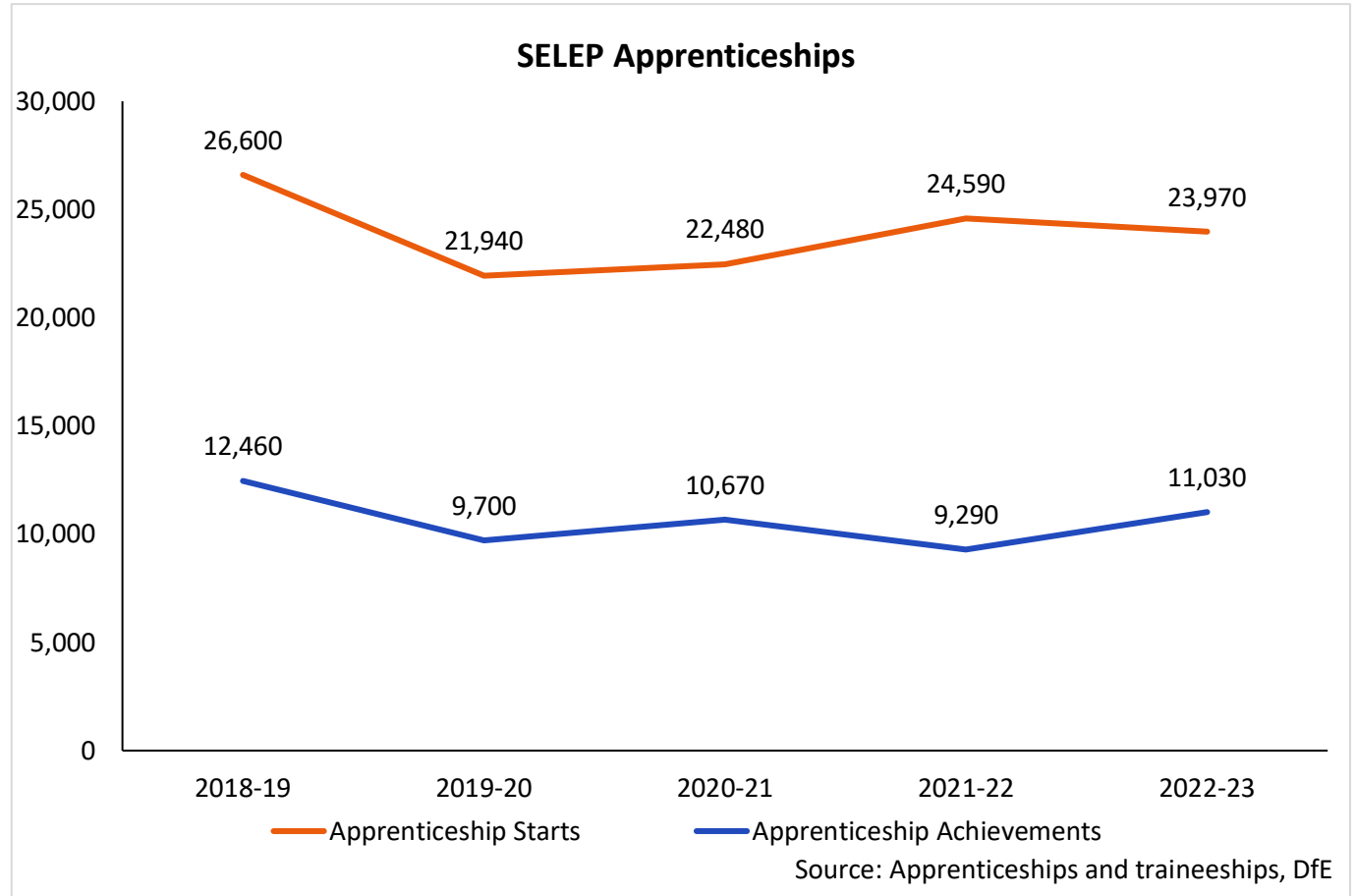




Apprenticeships

Total apprenticeship starts in the SELEP region **decreased to 23,970** in 2022-23 compared to **24,590** in 2021-22. Numbers remain **below** the pre-pandemic amount of **26,600** in 2018-19, although there was a **rise** in starts in 2020-21 and 2021-22.

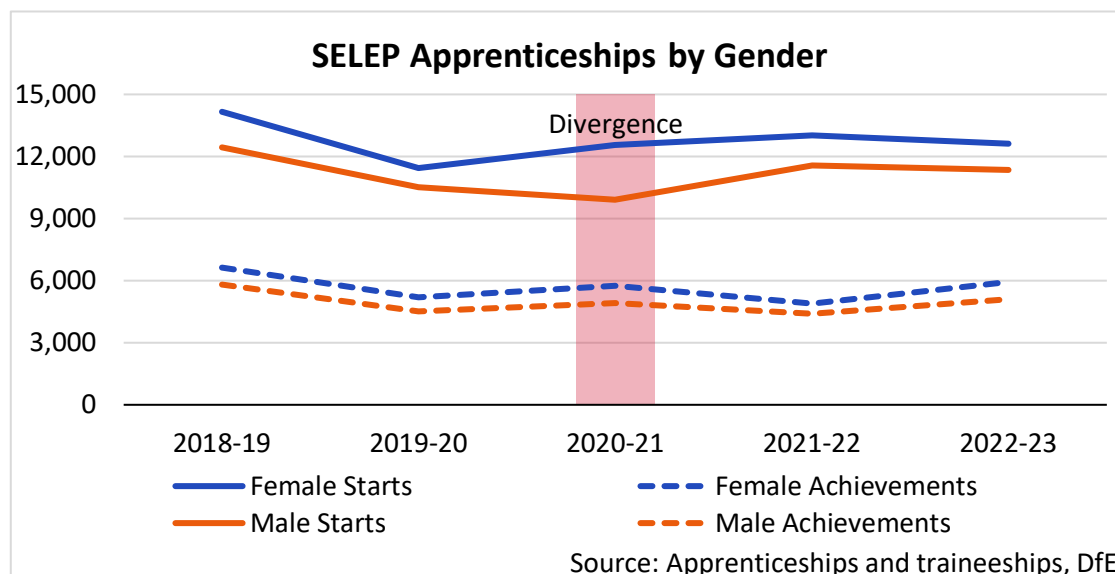
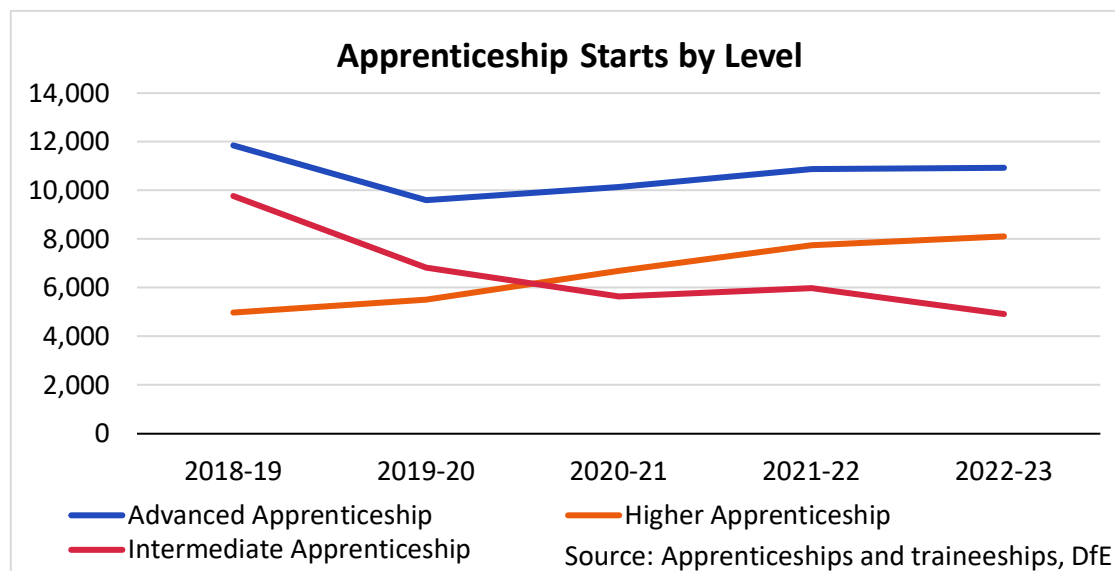
Total apprenticeship achievements in the SELEP region **rose** from **9,290** in 2021-22 to **11,030** in 2022-23 but remain **below** the **12,460** achievements in 2018/19. As achievements lag starts, we can expect more recovery in next year's figures.





Advanced and Higher Apprenticeships saw an **increase** in starts in 2022-23 compared to the previous year, whilst **Intermediate Apprenticeships** resumed a **fall** in numbers after a slight rise in the 2021-22 cohort. **Higher Apprenticeship** starts (**8,810**) are now **significantly higher** than Intermediate Apprenticeship starts (**4,920**). 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 2022-23 female starts (**12,630**) were **1290 higher** than male starts (**11,340**) and female achievements (**5940**) were **850 higher** than male achievements (**5,090**). The difference in **starts decreased** slightly, however the disparity in **achievements increased** significantly.





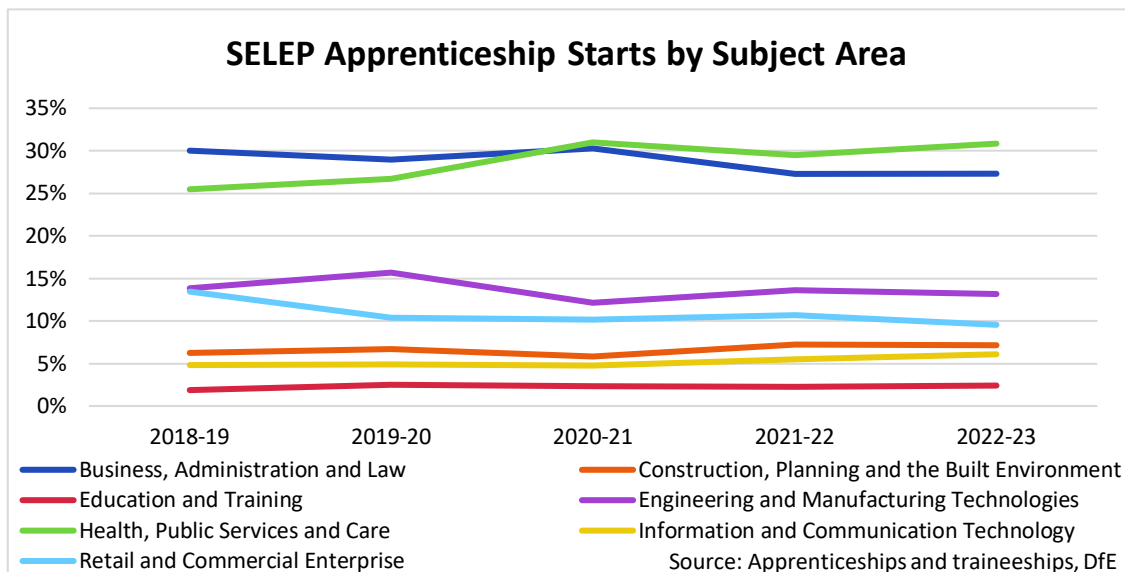
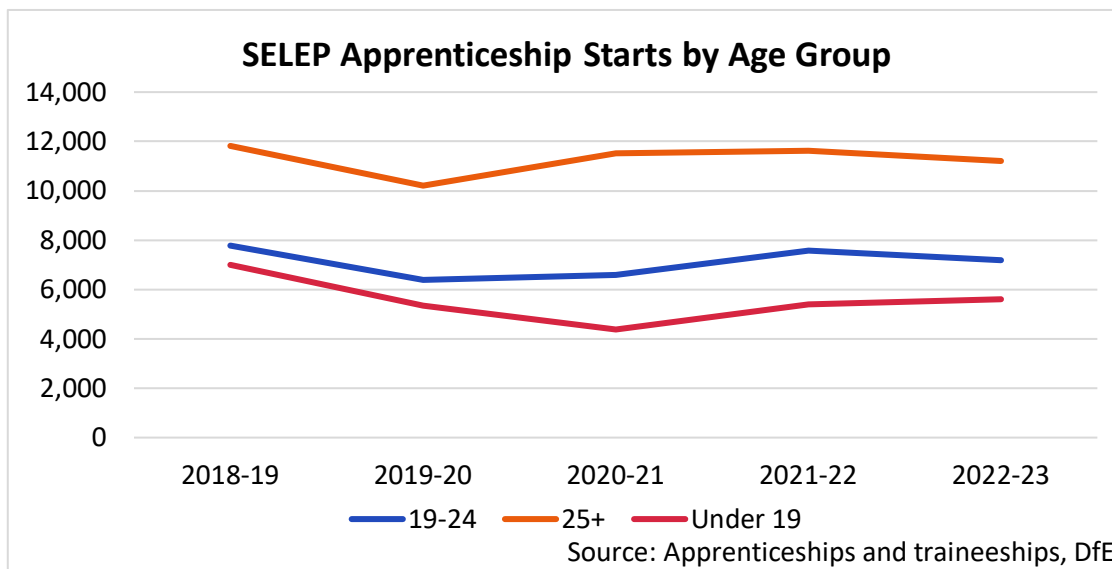
In 2022-23 apprentices over the age of 25 made up 47% of the total apprenticeship starts, whilst 30% of starters were between the age of 19 and 24 and 23% of starters were under 19. The proportion of apprentices between 19 and 24 has consistently been around 30% over the last 5 years. Whereas the proportion 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 2022-23 with 31% of starts being in the former and 27% in the latter. Health, Public Services and Care saw a nominal increase of 130 starts on the previous year, leading to its share of all apprenticeship starts to rise by 1.3%. Business, Administration and Law starts fell by 170 students, but its share of apprenticeship starts remained the same.

Engineering and Manufacturing Technologies remains the region's third most popular subject area despite starts decreasing by 190 in 2022-23 on the previous year – the subject area now accounts for 13% of total starts.

Starts in Retail and Commercial Enterprise Apprenticeships have fell by 350 students on the previous year. Starts in the subject sector area are 1300 (36%) fewer than the pre-pandemic figures in 2018/19.

Construction, Planning and the Built Environment saw apprenticeship starts fall by 70 starts (4%) in 2022-23 - the subject area continues to make up 7% of total starts.





Higher Education Progression Rate

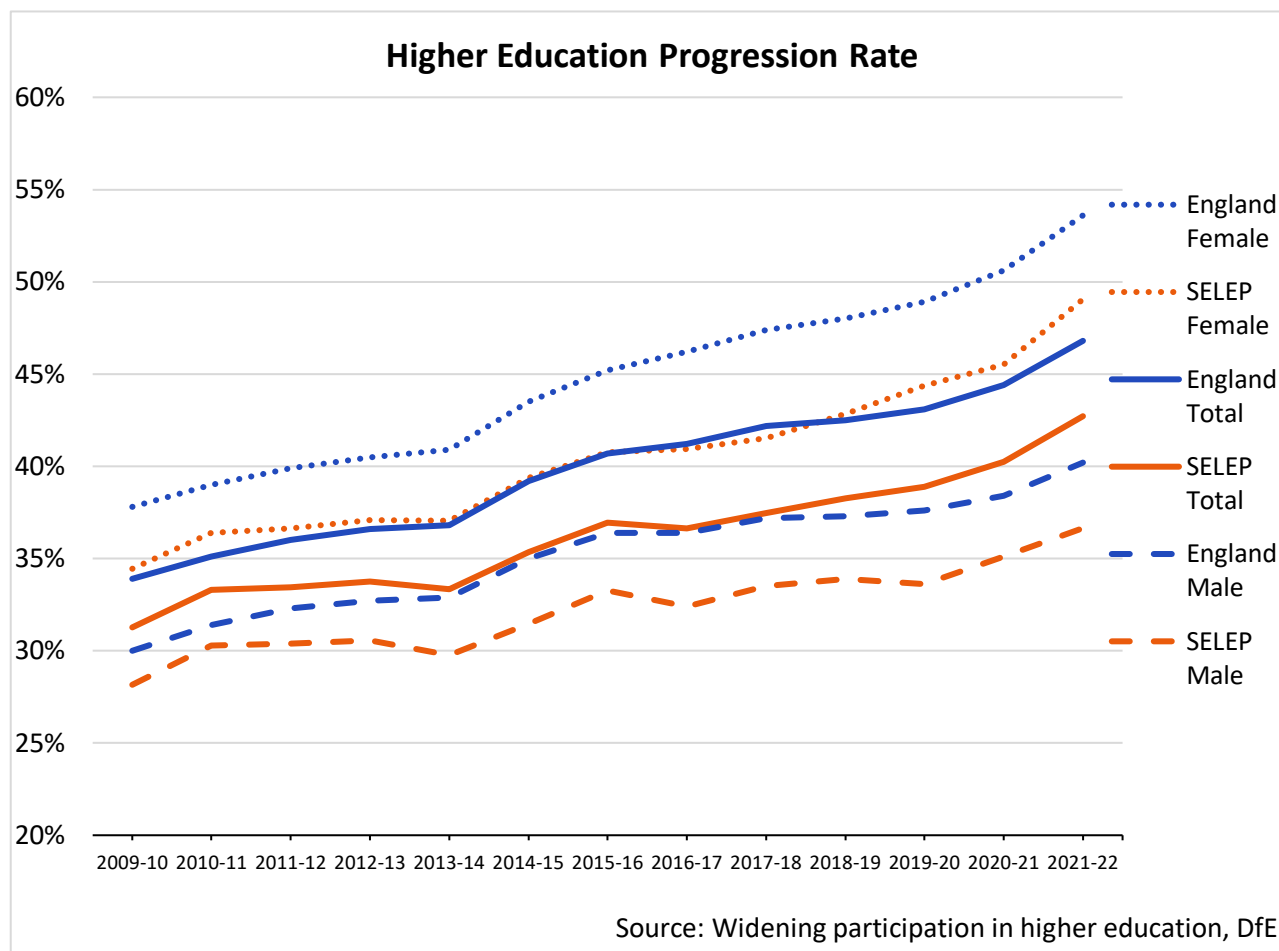
The following insights are from the Widening Participation in Higher Education publication from the Department of Education and contain data as recent as 2021/22.

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 Female Higher Education Progression Rate** has also **increased** every year since 2009/10, however the **Male rate dipped** in 2013/14, 2016/17 and 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 **4.1%** in 2021/22 (SELEP rate **42.7%**; National rate **46.8%**).

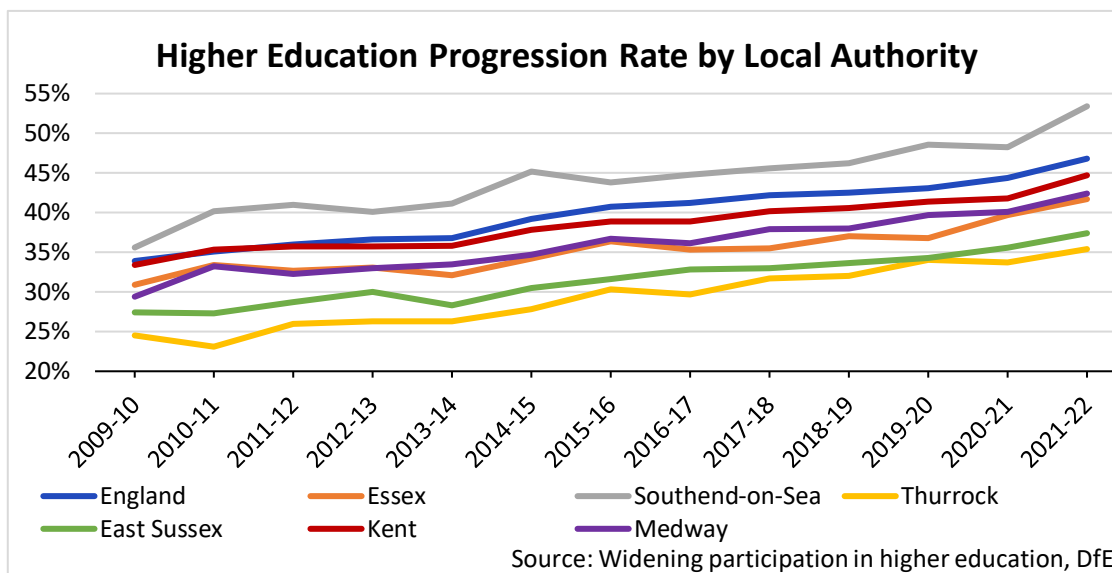
In 2021/22 the national female progression rate was **13.4% higher** than the national male progression rate, a **larger difference** than in the SELEP region, where the female progression rate was **12.4% higher** than the male progression rate. The gender difference has never been larger both nationally and in the SELEP region.

In 2021/22 the national female progression rate was **4.6% higher** than the SELEP female progression rate (National **53.6%**; SELEP **49.1%**), whilst the national male progression rate was **3.6% higher** than the SELEP male progression rate (National **40.2%**; SELEP **36.6%**).

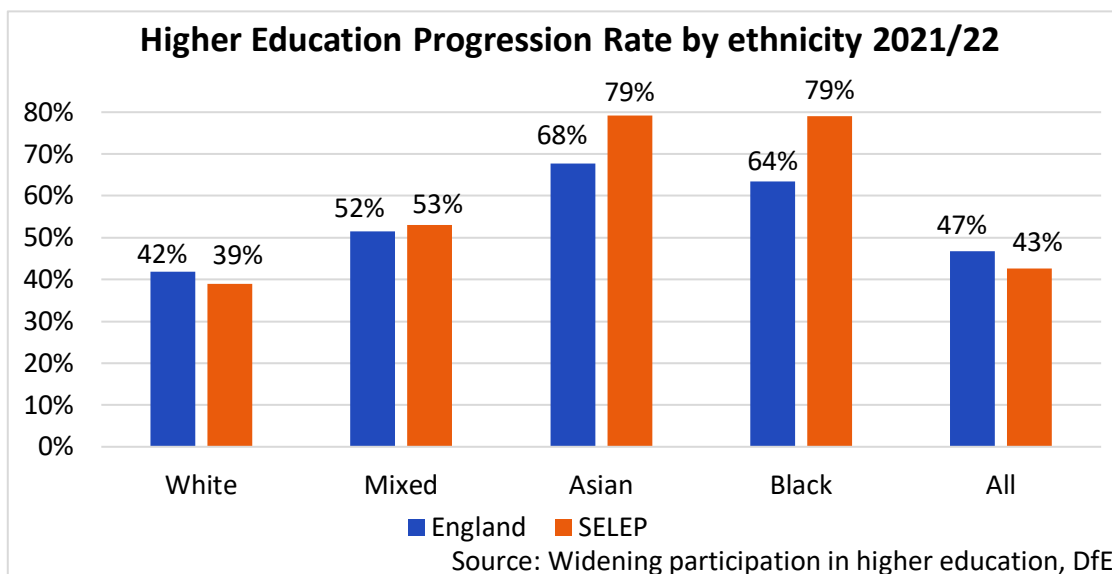




At a local authority level, **Southend-on-Sea** was the only area with a **higher** progression rate than the national rate (**53.4%** in 2021/22 compared to **46.8%** nationally). **Thurrock** had the **lowest** progression rate in the region in 2021/22 at **35.4%** followed by **East Sussex** (**37.4%**), **Essex** (**41.7%**), **Medway** (**42.4%**) and **Kent** (**44.7%**).



When looking at ethnicity it is important to understand that **86.9%** of the cohort in 2021/22 considered themselves to be **white**. The progression rate for **white** students in the SELEP region was **39.0%** in 2021/22, **2.8% lower** than the national rate for **white** students. **Mixed** students made up the **second largest** proportion of the cohort (**4.2%**) and had a progression rate of **53.1%**, **1.6% higher** than the national average for mixed students. **Asian** students comprised of the **third largest** portion of the cohort (**3.6%**) and had a progression rate of **79.2%**, **11.4% higher** than the national average for **Asian** students. **Black** students made up the **fourth largest** proportion of the SELEP cohort (**3.1%**) and had a progression rate of **79.1%**, **15.6% higher** than the national average for **Black** students.





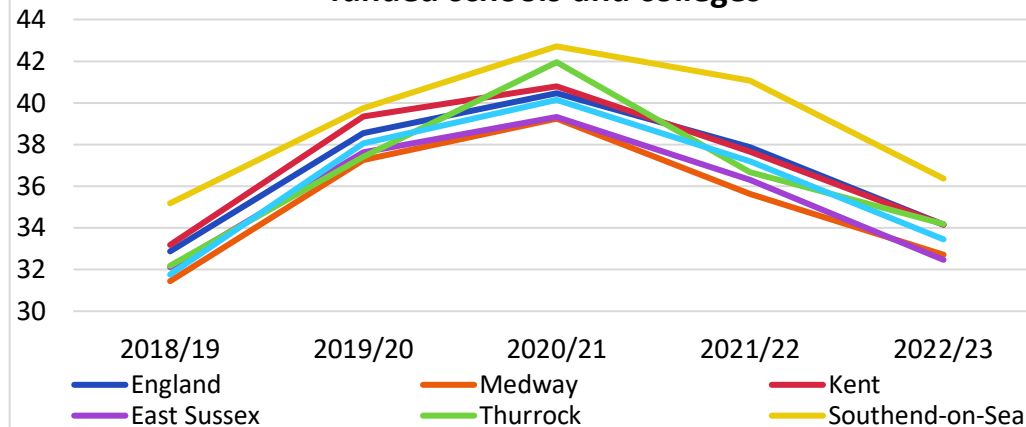
A level and other 16 to 18 results

The national Average Point Score (APS) per A level entry **fell** in 2022/23 to **34.2** (from **37.9** in 2021/22). This pattern **also** occurred across the SELEP region with the APS **falling** from **37.4** in 2021/22 to **33.8** in 2022/23, as exams in England largely returned to their pre-pandemic grading in summer 2023 – with a few added protections.

The APS across SELEP **varies dramatically** with **Southend-on-Sea** at **36.3** and **East Sussex** at **32.5** in 2022/23. The other local authorities had APS per entry between these extremes; **Medway** (**32.7**), **Essex** (**33.5**), **Kent** (**34.2**) and **Thurrock** (**34.2**). 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**, **Wokingham** and **Surrey** who all have APS of over 36. **Southend-on-Sea** **only trails** **Cambridgeshire** in the East of England region and **Essex** and **Thurrock** sit in the **middle** of the pack.

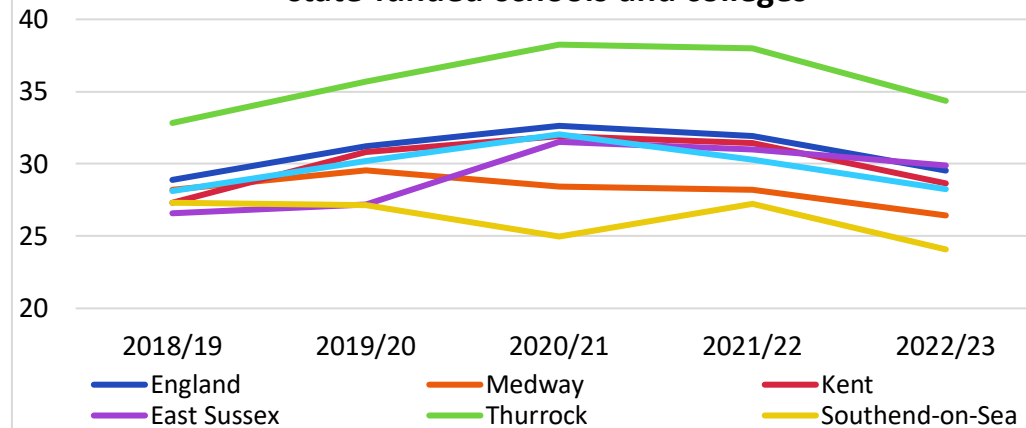
The national APS per general qualification entry **fell** from **31.9** in 2021/22 to **29.5** in 2022/23. Historically the South-East and East of England have had the **worst** APS scores and **continue** to show this in the 2022/23, although London has fallen into this lower end too. **Thurrock** had the **best** APS per general qualification entry in the SELEP region at **34.4** points, this was also the **highest** score in the **East of England** region. However, **Essex** (**28.3**) and **Southend-on-Sea** (**24.1**) had much poorer general qualification APS, with **Southend-on-Sea** being the **worst** performing local authority in the East of England and the **third worst** in the whole country. **Medway** (**26.4**) and **Kent** (**28.7**) fell **below** the national average APS, unlike **East Sussex** (**29.9**). **Medway** was the **second worst** performing local authority in the South-East region; **Kent** was amongst the **middle** performers and **East Sussex** came **fourth**.

Average Point Score per A level entry for all state-funded schools and colleges



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

Average Point Score per applied general entry for all state-funded schools and colleges



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



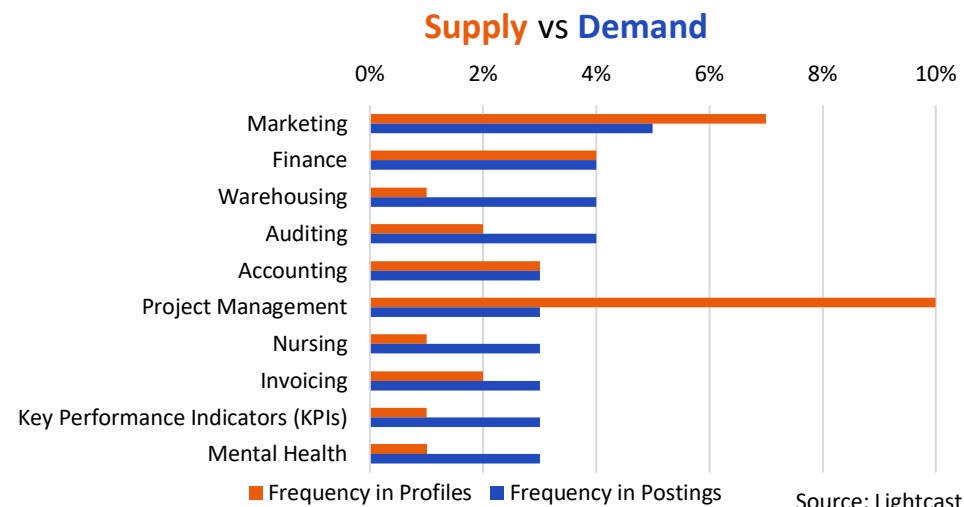
Skills Demand and Supply

The following provides insight into the supply and demand of relevant skills by comparing the frequency of skills present in job postings against skills present in today's workforce. Lightcast is a provider that enables Labour Market and Job Postings analysis. Along with Lightcast's job posting analytics, this comparison leverages Lightcast's dataset of more than 100M online resumés and profiles. All resumés and profiles used in these comparisons have been updated within the last three years. This specific data comes from 1,405,446 job postings and 839,583 profiles from the period between November 2020 and November 2023.

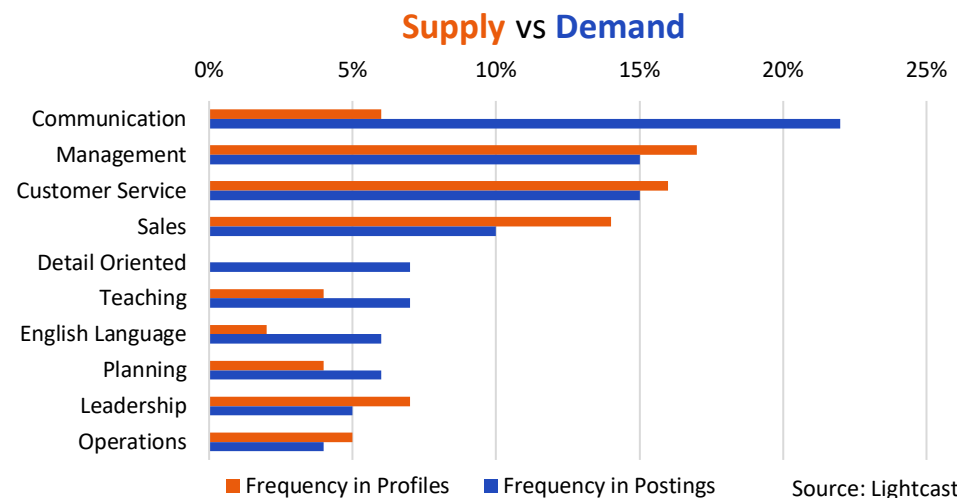
The top 10 specialised skills are largely a reflection of the **most common occupations** within the SELEP region. Of the top 10, only **Marketing** and **Project Management** are **oversupplied** in proportional terms and **Project Management** is the **only** skill to be mentioned in **more** profiles than postings (**36,885 more**). For reference **Marketing** appeared in **7 percent** of profiles and only **5 percent** of postings, yet in absolute terms it featured in **19,152 more** job postings than profiles. **Warehousing, Auditing, Nursing, KPIs** and **Mental Health** appeared between **2-3 percent** more in profiles than in job postings proportionally.

Communication was by far the **most sought-after** skill and yet there was a **16% undersupply** proportionally, which meant nominally that there were **262,745 more** job postings mentioning communication than there were candidate profiles. The other notable **undersupply** was regarding being **Detail Oriented**, as only **3,814** of the **839,583** profiles mentioned it and **100,0623** job postings looked for it. **Sales, Management, Customer Service, Leadership** and **Operations** all proportionally appeared **more** often in profiles than in postings.

SELEP top 10 most demanded specialised skills



SELEP top 10 most demanded transferable skills



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 85 sectors, which is sufficient for most analysis.

Sectors with **larger** SELEP growth than national growth include **Media activities, Creative, arts and entertainment and Warehousing and support activities for transportation, Security and investigation activities, Construction of buildings, Services to buildings and landscape activities, Public administration and defence, Waste collection and Specialised construction activities.**

Sectors with **larger** national growth than SELEP growth include **Repair of computers and personal and household goods, Programming and broadcasting activities, Scientific research and development, Postal and courier activities, Real estate activities and Human health activities.**

Sectors with SELEP **contraction** and national **growth** include **Advertising and market research, Architectural and engineering activities, Publishing activities and Computer programming.**

Sectors with national **contraction** and SELEP **growth** include **Manufacture of textiles, Manufacture of motor vehicles, Financial service activities except insurance and pension funding, Land transport and transport via pipelines and Other professional, scientific and technical activities.**

Sectors with **larger** SELEP contraction than national contraction include **Printing and reproduction of recorded media, Manufacture of rubber and plastic products and Manufacture of electrical equipment.**

Sectors with **larger** national contraction than SELEP contraction include **Travel agency, Electricity, gas, steam and air conditioning supply, Civil engineering and Retail trade.**

Sector	Employment numbers (2022)
Retail trade	165,000
Education	151,000
Human Health	127,000
Food and beverage serving activities	114,000
Specialised construction activities	76,000
Public Administration and defence	70,000
Wholesale trade	68,000
Residential care activities	50,000
Services to buildings and landscape activities	49,000
Warehousing and support activities for transportation	49,000



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**” have three of the highest Location Quotients in the SELEP region, with values of **1.6, 2.7 and 1.7** respectively. Thus, the employment share in these industries in SELEP is around **twice as high** as the national average. However, these are **relatively small** industries and employ just **0.3%** of the total workforce in SELEP. These are also industries which tend to be **highly specialised** in a few places. For example, only **7** of the **32** SELEP local authorities have a specialism (location quotient >1) in **Water Transport** and upon further investigation we find that **Dover** has a LQ of **44**, making it a major hub nationally and accounting for most of this insight.

Other sectors where SELEP has an overall **high relative specialism**, with an LQ of **1.5** or above are **Crop and animal production, Manufacture of computer, electronic and optical products, Specialised construction activities, Forestry and logging, Waste collection, treatment and disposal activities and Manufacture of other non-metallic mineral products.**

There are 20 sectors with LQs **between 1.0 and 1.5** and includes some related activities. The largest of these sectors (by employee numbers) includes: **Construction of buildings, Trade and repair of motor vehicles and motorcycles, Residential care activities, Warehousing and support activities for transportation, Services to buildings and landscape activities, Civil Engineering, Land transport and transport via pipelines, Sports activities and amusement and recreation activities, Retail Trade, Postal and courier activities, Education, Wholesale trade and Food and beverage service activities Social work 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**”.



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, the table below identifies all local authorities with a location quotient above 5.

Sector	Local authorities with strong specialism (LQ > 5)
01 : Crop and animal production, hunting and related service activities	Swale
02 : Forestry and logging	Maldon, Rochford, Tunbridge Wells, Wealden
03 : Fishing and aquaculture	Brentwood, Colchester, Rochford, Southend-on-Sea
11 : Manufacture of beverages	Lewes
13 : Manufacture of textiles	Maldon
17 : Manufacture of paper and paper products	Gravesham
19 : Manufacture of coke and refined petroleum products	Gravesham, Tendring
23 : Manufacture of other non-metallic mineral products	Braintree, Castle Point, Maldon, Rochford
26 : Manufacture of computer, electronic and optical products	Hastings, Maldon
29 : Manufacture of motor vehicles, trailers and semi-trailers	Basildon, Rochford
36 : Water collection, treatment and supply	Tonbridge and Malling, Braintree, Chelmsford, Maldon
39 : Remediation activities and other waste management services	Basildon
50 : Water transport	Dover
51 : Air transport	Uttlesford
52 : Warehousing and support activities for transportation	Thurrock
64 : Financial service activities, except insurance and pension funding	Tendring
65 : Insurance, reinsurance and pension funding, except compulsory social security	Tunbridge Wells
66 : Activities auxiliary to financial services and insurance activities	Rother
72 : Scientific research and development	Dover
79 : Travel agency, tour operator and other reservation service and related activities	Folkestone and Hythe
94 : Activities of membership organisations	Folkestone and Hythe
95 : Repair of computers and personal and household goods	Tunbridge Wells



Focus on Sectors

There is particular interest in certain sectors from stakeholders, either due to **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**.

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 and Trade (DBT)**, **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**.



Top 5 Sectors by Business Count Location Quotient

Data as of March 2024

Local Authority	1	2	3	4	5
Ashford	Wearables and Quantified Self	Business Support Services	MedTech	Geospatial Economy	Digital Creative Industries
Basildon	Modular Construction	Design and Modelling Technologies	E-Commerce	Internet of Things	Photonics
Braintree	Telecommunications	Supply Chain Logistics	Gaming	Design and Modelling Technologies	Land Remediation
Brentwood	Design and Modelling Technologies	Engineering Biology Application	Business Support Services	Immersive Technologies	Pharma
Canterbury	Space Energy	Digital Creative Industries	Software as a Service (SaaS)	Biopharmaceutical	EdTech
Castle Point	Land Remediation	In-Orbit Space Manufacturing	Design and Modelling Technologies	Rehabilitation	Energy Management
Chelmsford	EdTech	AdTech	Data Intermediaries	In-Orbit Space Manufacturing	Space Energy
Colchester	Internet of Things	Energy Generation	Marine and Maritime	Omics	Sensors
Dartford	Modular Construction	Supply Chain Logistics	Land Remediation	Internet of Things	Cyber
Dover	Engineering Biology Application	Land Remediation	Pharma	Data Intermediaries	Marine and Maritime
Eastbourne	Life Sciences	Streaming Economy	Space Economy	Energy Generation	Land Remediation
Epping Forest	E-Commerce	Supply Chain Logistics	Pharma	Business Support Services	Wearables and Quantified Self
Folkestone and Hythe	E-Commerce	Gaming	Digital Creative Industries	Autonomy and Robotics	Software as a Service (SaaS)
Gravesham	Internet of Things	E-Commerce	Electronics Manufacturing	Marine and Maritime	Quantum Economy
Harlow	Data Intermediaries	Geospatial Economy	Artificial Intelligence	Design and Modelling Technologies	Data Infrastructure
Hastings	Space Energy	Omics	AdTech	Photonics	Engineering Biology Supply Chain



Lewes	Engineering Biology Application	Data Intermediaries	Pharma	Immersive Technologies	CleanTech
Maidstone	Pharma	Digital Creative Industries	Legal Services	Media and Publishing	Data Infrastructure
Maldon	Modular Construction	Supply Chain Logistics	Computer Hardware	Wearables and Quantified Self	Photonics
Medway	Autonomy and Robotics	Electronics Manufacturing	Photonics	Geospatial Economy	Marine and Maritime
Rochford	Geospatial Economy	Photonics	Design and Modelling Technologies	Computer Hardware	Energy Storage
Rother	Quantum Economy	Photonics	Space Energy	Data Intermediaries	Food Technology
Sevenoaks	Sensors	Land Remediation	E-Commerce	Business Support Services	Computer Hardware
Southend-on-Sea	E-Commerce	Software as a Service (SaaS)	Design and Modelling Technologies	MedTech	Autonomy and Robotics
Swale	Autonomy and Robotics	Quantum Economy	Marine and Maritime	Biopharmaceutical	Land Remediation
Tendring	Land Remediation	Media and Publishing	Engineering Biology Supply Chain	Food Technology	Energy Storage
Thanet	Immersive Technologies	Gaming	MedTech	Cryptocurrency Economy	Digital Creative Industries
Thurrock	E-Commerce	Supply Chain Logistics	Land Remediation	Streaming Economy	Photonics
Tonbridge and Malling	MedTech	Autonomy and Robotics	Design and Modelling Technologies	Engineering Biology Supply Chain	Quantum Economy
Tunbridge Wells	Legal Services	Engineering Biology Supply Chain	Agency Market	CleanTech	Energy Storage
Uttlesford	Engineering Biology Application	Omics	Engineering Biology Supply Chain	Biopharmaceutical	EdTech
Wealden	Engineering Biology Supply Chain	Biopharmaceutical	Gaming	Design and Modelling Technologies	Computer Hardware



Top 5 Sectors by Employees Location Quotient

Data as of March 2024

Local Authority	1	2	3	4	5
Ashford	Wearables and Quantified Self	Land Remediation	Media and Publishing	MedTech	Business Support Services
Basildon	Modular Construction	Design and Modelling Technologies	Advanced Manufacturing	Autonomy and Robotics	Business Support Services
Braintree	Land Remediation	Supply Chain Logistics	Design and Modelling Technologies	Advanced Materials	E-Commerce
Brentwood	Artificial Intelligence	Pharma	Immersive Technologies	Business Support Services	Media and Publishing
Canterbury	Digital Creative Industries	Advanced Manufacturing	Media and Publishing	Business Support Services	Agency Market
Castle Point	Land Remediation	Business Support Services	Rehabilitation	Data Infrastructure	Photonics
Chelmsford	Geospatial Economy	EdTech	Computer Hardware	AdTech	Design and Modelling Technologies
Colchester	Media and Publishing	Rehabilitation	Legal Services	Computer Hardware	Energy Generation
Dartford	Modular Construction	Land Remediation	Energy Management	Rehabilitation	Business Support Services
Dover	Land Remediation	Cyber	Data Infrastructure	Software Development	Advanced Manufacturing
Eastbourne	EdTech	Data Intermediaries	Business Support Services	Streaming Economy	Life Sciences
Epping Forest	E-Commerce	Supply Chain Logistics	Business Support Services	Cyber	Agency Market
Folkestone and Hythe	E-Commerce	Autonomy and Robotics	Agency Market	Geospatial Economy	Energy Generation
Gravesham	Business Support Services	Electronics Manufacturing	Advanced Manufacturing	Immersive Technologies	Media and Publishing
Harlow	Advanced Manufacturing	Geospatial Economy	Business Support Services	Photonics	Computer Hardware
Hastings	Computer Hardware	Electronics Manufacturing	CleanTech	Space Energy	E-Commerce



Lewes	Wearables and Quantified Self	Agency Market	Digital Creative Industries	Data Intermediaries	Electronics Manufacturing
Maidstone	Food Technology	Data Intermediaries	Agency Market	Digital Creative Industries	Data Infrastructure
Maldon	Wearables and Quantified Self	Supply Chain Logistics	Computer Hardware	Electronics Manufacturing	Data Intermediaries
Medway	Geospatial Economy	Land Remediation	Electronics Manufacturing	Computer Hardware	Photonics
Rochford	Computer Hardware	Gaming	Electronics Manufacturing	Design and Modelling Technologies	Geospatial Economy
Rother	Quantum Economy	Streaming Economy	Electronics Manufacturing	Photonics	Sensors
Sevenoaks	Sensors	Business Support Services	Data Intermediaries	Land Remediation	E-Commerce
Southend-on-Sea	Business Support Services	E-Commerce	Advanced Manufacturing	Agency Market	Media and Publishing
Swale	Digital Creative Industries	Quantum Economy	Geospatial Economy	Autonomy and Robotics	Energy Generation
Tendring	Computer Hardware	Photonics	Land Remediation	Advanced Manufacturing	Media and Publishing
Thanet	Immersive Technologies	Digital Creative Industries	Energy Management	Gaming	Electronics Manufacturing
Thurrock	Media and Publishing	E-Commerce	Land Remediation	Business Support Services	Rehabilitation
Tonbridge and Malling	Design and Modelling Technologies	Agency Market	Business Support Services	Quantum Economy	Food Technology
Tunbridge Wells	Energy Storage	Legal Services	Agency Market	Software as a Service (SaaS)	Supply Chain Logistics
Uttlesford	Omics	Engineering Biology Supply Chain	Advanced Manufacturing	Biopharmaceutical	EdTech
Wealden	Immersive Technologies	Media and Publishing	Land Remediation	Design and Modelling Technologies	Life Sciences



Top 5 Sectors by Turnover Location Quotient

Data as of March 2024

Local Authority	1	2	3	4	5
Ashford	Wearables and Quantified Self	Land Remediation	Business Support Services	MedTech	Electronics Manufacturing
Basildon	Modular Construction	Supply Chain Logistics	Autonomy and Robotics	Business Support Services	Wearables and Quantified Self
Braintree	Supply Chain Logistics	Land Remediation	Electronics Manufacturing	Gaming	Design and Modelling Technologies
Brentwood	Artificial Intelligence	Immersive Technologies	Pharma	Media and Publishing	Design and Modelling Technologies
Canterbury	Advanced Manufacturing	Media and Publishing	Advanced Materials	Digital Creative Industries	Agency Market
Castle Point	Land Remediation	Business Support Services	Rehabilitation	Design and Modelling Technologies	Advanced Manufacturing
Chelmsford	EdTech	Geospatial Economy	Computer Hardware	Advanced Manufacturing	In-Orbit Space Manufacturing
Colchester	Media and Publishing	Rehabilitation	Computer Hardware	In-Orbit Space Manufacturing	Agency Market
Dartford	Modular Construction	Land Remediation	Rehabilitation	Business Support Services	Advanced Manufacturing
Dover	Land Remediation	Cyber	Software Development	Data Infrastructure	Advanced Manufacturing
Eastbourne	Business Support Services	Biopharmaceutical	Rehabilitation	EdTech	Geospatial Economy
Epping Forest	E-Commerce	Supply Chain Logistics	Business Support Services	Agency Market	Cyber
Folkestone and Hythe	E-Commerce	Autonomy and Robotics	Geospatial Economy	Agency Market	Business Support Services
Gravesham	Electronics Manufacturing	Business Support Services	Advanced Manufacturing	Streaming Economy	Immersive Technologies
Harlow	Artificial Intelligence	Geospatial Economy	Data Infrastructure	Advanced Manufacturing	Business Support Services
Hastings	Computer Hardware	Electronics Manufacturing	Business Support Services	Agency Market	E-Commerce



Lewes	Wearables and Quantified Self	Electronics Manufacturing	Agency Market	Digital Creative Industries	Energy Storage
Maidstone	Data Intermediaries	Food Technology	Digital Creative Industries	Data Infrastructure	Agency Market
Maldon	Supply Chain Logistics	Computer Hardware	Wearables and Quantified Self	Data Intermediaries	Modular Construction
Medway	Geospatial Economy	Land Remediation	Computer Hardware	Electronics Manufacturing	Photonics
Rochford	Gaming	Computer Hardware	Electronics Manufacturing	Photonics	Design and Modelling Technologies
Rother	Quantum Economy	Electronics Manufacturing	Agency Market	Photonics	Streaming Economy
Sevenoaks	Business Support Services	Sensors	FinTech	Gaming	Data Intermediaries
Southend-on-Sea	E-Commerce	Advanced Manufacturing	Business Support Services	Agency Market	Media and Publishing
Swale	Digital Creative Industries	Geospatial Economy	Quantum Economy	Marine and Maritime	Life Sciences
Tendring	Photonics	Computer Hardware	Advanced Manufacturing	Land Remediation	Marine and Maritime
Thanet	EdTech	MedTech	Digital Creative Industries	Immersive Technologies	Electronics Manufacturing
Thurrock	Land Remediation	E-Commerce	Rehabilitation	Supply Chain Logistics	Business Support Services
Tonbridge and Malling	Business Support Services	Design and Modelling Technologies	Agency Market	Rehabilitation	Quantum Economy
Tunbridge Wells	Software as a Service (SaaS)	Agency Market	Legal Services	Engineering Biology Supply Chain	Supply Chain Logistics
Uttlesford	Biopharmaceutical	Advanced Manufacturing	Omics	Food Technology	EdTech
Wealden	Immersive Technologies	Media and Publishing	Rehabilitation	Computer Hardware	Land Remediation



Life Sciences

All eyes were on the **Life Sciences** sector during the Covid-19 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 **£34.9 billion investment funding** and **£3.1 billion Innovate UK grant funding** over the last 10 years. In 2021 alone, **£10.8 billion of investment funding** was given to the sector, **£4.3 billion** in 2022 and **£8 billion** in 2023 - 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.

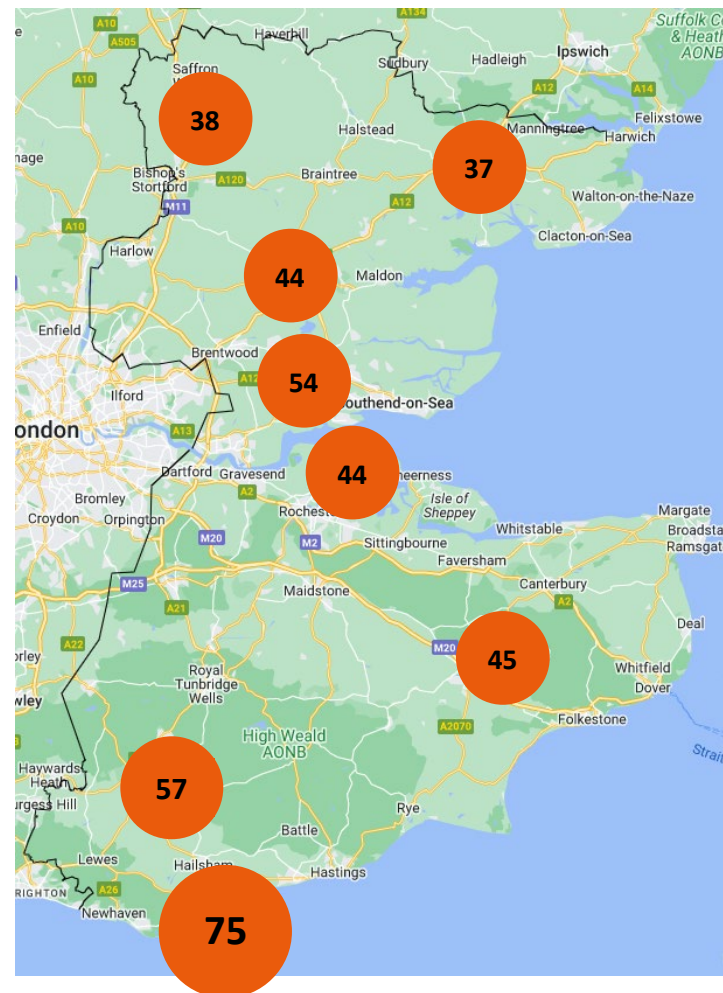
Data city defines this RTIC sector as those companies involved in **Biology and BioTech, Chemical products and services, Environmental Sciences Products and Services, Human Health Services, Life Sciences Manufacturing, Research** and **Synthetic Biotechnology**. In March 2024 analysis identified **998** companies in this RTIC sector in the SELEP region, in 2023 there were 1,101 companies identified.

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

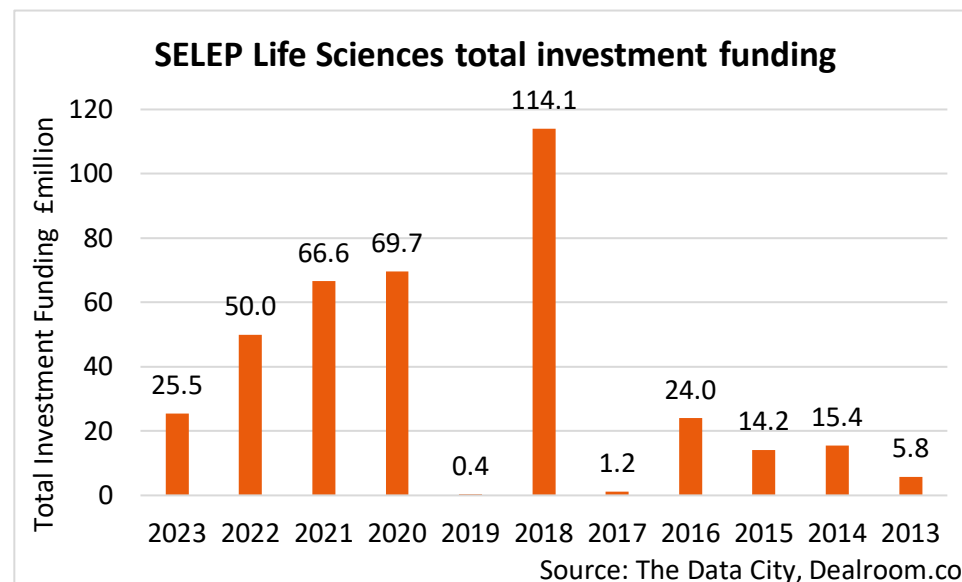
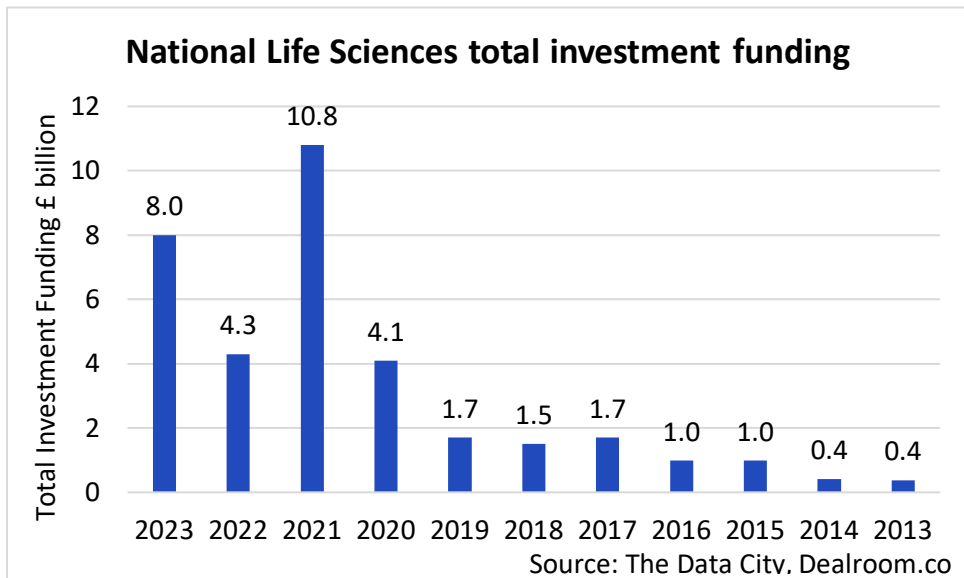
Source: The Data City, Google Maps





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 **75** companies, and **Wealden** was the **second** most common with **57** companies. **Ashford, Chelmsford, Medway, Basildon and Brentwood** all had **over 40** companies. **Castle Point** had the **fewest** companies at **12** and **Dover, Gravesham, Harlow, Hastings, Maldon, Rother and Tendring** all had **fewer than 20** companies.

At a national level, The Data City estimates **20,211** companies with **992,503** employees and a total turnover of **£259.9 billion**. They also estimate a **+7.5% 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.





LQ <1 = below national average
LQ = 1 = equal to national average
LQ > 1 = above national average

Life Sciences (LQ = Location Quotient)

Local Authority	Business Count	Business Count LQ	Employee LQ	Turnover LQ
Ashford	45	1.3	0.7	0.7
Basildon	54	1.0	0.3	0.1
Braintree	34	1.0	0.2	0.2
Brentwood	41	1.4	0.2	0.1
Canterbury	36	1.1	0.8	0.4
Castle Point	12	0.5	0.1	0.2
Chelmsford	44	0.9	0.2	0.1
Colchester	37	0.8	0.2	0.1
Dartford	29	0.8	0.1	0.2
Dover	19	1.0	0.3	0.1
Eastbourne	75	3.0	1.7	1.0
Epping Forest	26	0.5	0.1	0.1
Folkestone and Hythe	20	0.9	0.8	0.6
Gravesham	15	0.5	0.4	0.2
Harlow	19	0.7	0.2	0.2
Hastings	13	0.9	0.8	0.7
Lewes	23	1.3	0.3	0.2
Maidstone	39	0.9	0.6	0.4
Maldon	19	1.1	0.6	0.4
Medway	44	0.7	0.5	0.4
Rochford	21	1.1	3.0	1.4
Rother	17	0.7	0.1	0.1
Sevenoaks	34	0.8	0.3	0.5
Southend-on-Sea	32	0.5	0.2	0.4
Swale	27	1.1	0.4	1.8
Tendring	19	0.9	0.6	0.4
Thanet	21	0.8	0.5	0.6
Thurrock	27	0.6	0.2	0.1
Tonbridge and Malling	30	0.8	0.1	0.1
Tunbridge Wells	31	0.9	0.9	0.8
Uttlesford	38	1.4	0.7	0.4
Wealden	57	1.3	3.0	3.8



Clean growth in the South East was one of SELEP’s mainstay objectives, as highlighted in our [Economic Recovery and Renewal Strategy](#), whether through **reducing emissions** or **boosting local low carbon industries**. The pressing nature of Climate Change means it is a high priority throughout the country, with **£19.6 billion investment funding** and **£708 million Innovate UK grant** funding in the last 5 years.

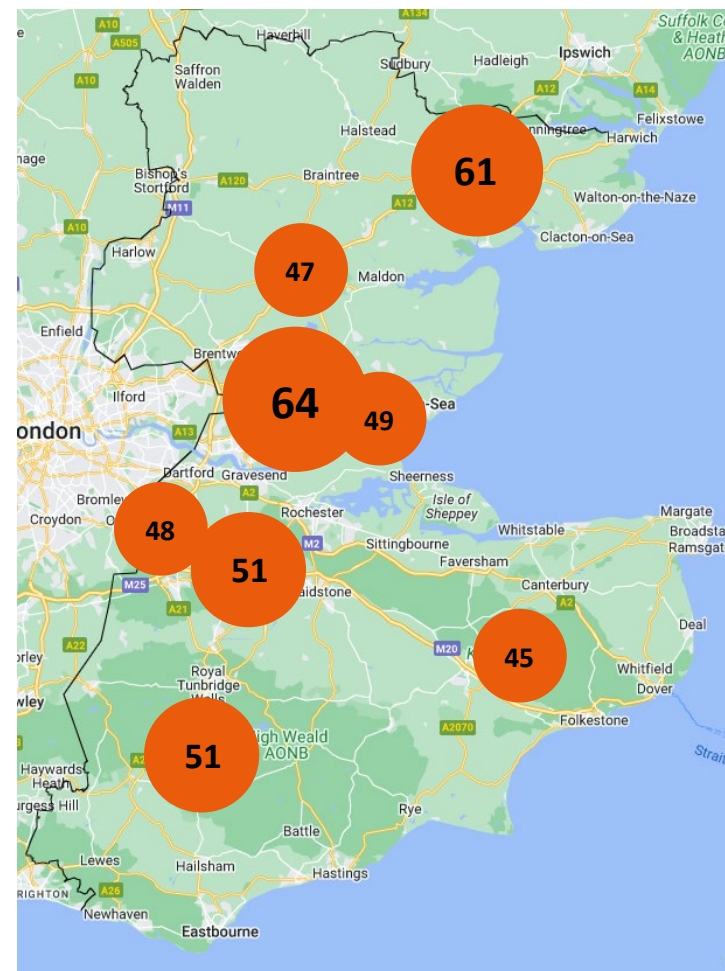
Data city defines this RTIC sector as those companies in the **Net Zero Supply chain**, which covers many industries working to **reduce greenhouse gas emissions**. These include; **Agritech, Building Technologies, Carbon Capture, Diversion of Biodegradable Waste from Landfill, Energy Cooperatives, Energy Storage, Green Finance, Grid, Heating, Low Carbon, Low Carbon Consultancy Advisory and Offsetting Services, Low Emission Vehicles, Pollution Control and Mitigation, Renewables, Renewable Energy Planning Database, Waste Management and Recycling**. In March 2024 analysis identified **1,041** companies in this RTIC sector in the SELEP region, in 2023 there were 931 companies identified.

Of the total number of companies identified in this sector, most (**20%**) are classified at Companies House as being within the **Construction** SIC sector, **19%** fall under **Professional, scientific and technical activities**, **16%** fall under **water supply, sewerage, waste management and remediation**, **12%** under **administrative and support service activities** and **8%** under **wholesale and retail trade; repair of motor vehicles and motorcycles**.

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**.

Business count by local authority

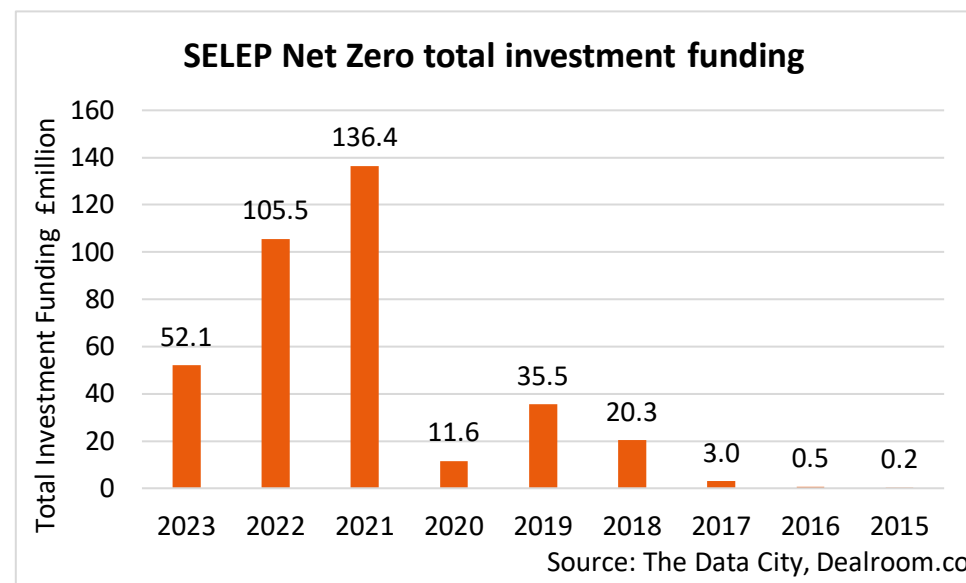
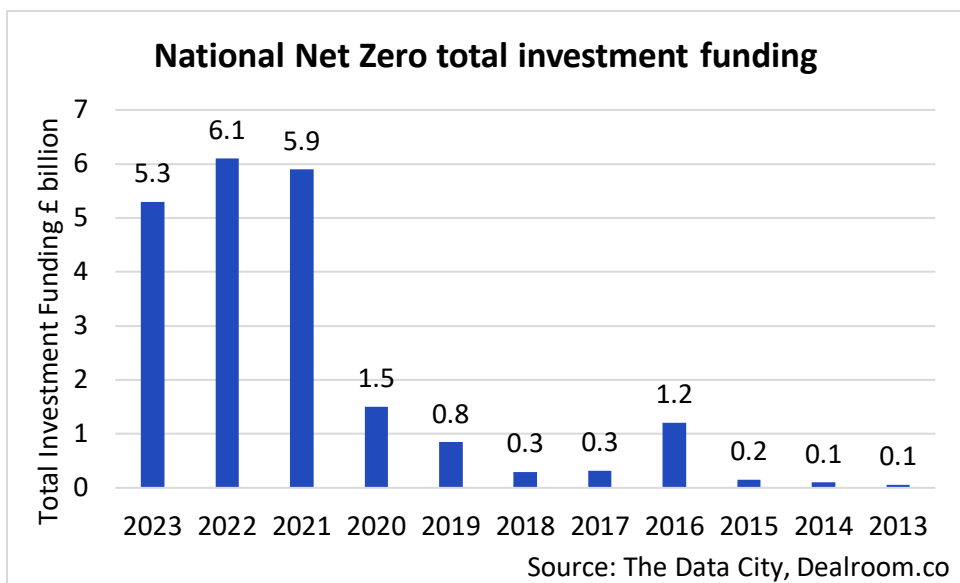
Source: The Data City, Google Maps





Of the businesses identified within the SELEP region, **all 32 local authorities were present** within the RTIC sector. **Basildon** was the **most common** location with **64** companies. **Colchester, Tonbridge and Malling and Wealden** had **over 50** companies. **Folkestone and Hythe** had the **fewest** companies at **7**, an outlier as the other local authorities had **more than 13** Net Zero businesses. **Gravesham, Harlow, Hastings, Maldon, Tendring and Thanet** had between **14-18** businesses within the RTIC sector.

At a national level, The Data City estimates **22,960** companies with **854,736** employees and a total turnover of **£1.2 trillion**. They also estimate a **+4.0%** 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.





LQ <1 = below national average
LQ = 1 = equal to national average
LQ > 1 = above national average

Net Zero (LQ = Location Quotient)

Local Authority	Business Count	Business Count LQ	Employee LQ	Turnover LQ
Ashford	45	1.2	0.3	0.2
Basildon	64	1.1	0.2	0.0
Braintree	31	0.8	0.3	0.2
Brentwood	29	0.9	0.2	0.0
Canterbury	36	1.0	0.4	0.1
Castle Point	22	0.9	0.2	0.1
Chelmsford	47	0.9	0.2	0.3
Colchester	61	1.2	0.5	0.1
Dartford	35	0.8	0.3	0.1
Dover	25	1.2	0.4	0.0
Eastbourne	25	0.9	0.2	0.1
Epping Forest	38	0.7	0.3	0.1
Folkestone and Hythe	7	0.3	0.2	0.0
Gravesham	17	0.5	0.0	0.0
Harlow	16	0.5	0.1	0.0
Hastings	15	0.9	0.8	0.1
Lewes	26	1.3	0.4	0.1
Maidstone	31	0.6	0.1	0.0
Maldon	14	0.7	0.5	0.1
Medway	43	0.7	0.3	0.1
Rochford	21	1.0	0.1	0.0
Rother	26	0.9	0.3	0.1
Sevenoaks	48	1.0	0.6	0.4
Southend-on-Sea	49	0.7	0.2	0.1
Swale	23	0.8	1.4	0.5
Tendring	16	0.7	0.2	0.1
Thanet	18	0.6	0.1	0.0
Thurrock	37	0.7	0.4	0.1
Tonbridge and Malling	51	1.2	0.1	0.1
Tunbridge Wells	31	0.8	0.4	0.1
Uttlesford	43	1.4	0.4	0.1
Wealden	51	1.1	0.6	0.3



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** including **Advertising, Architecture, Culture and Heritage, Design, Entertainment and Performing Arts, Non-fungible Tokens, Photography and Streaming**.

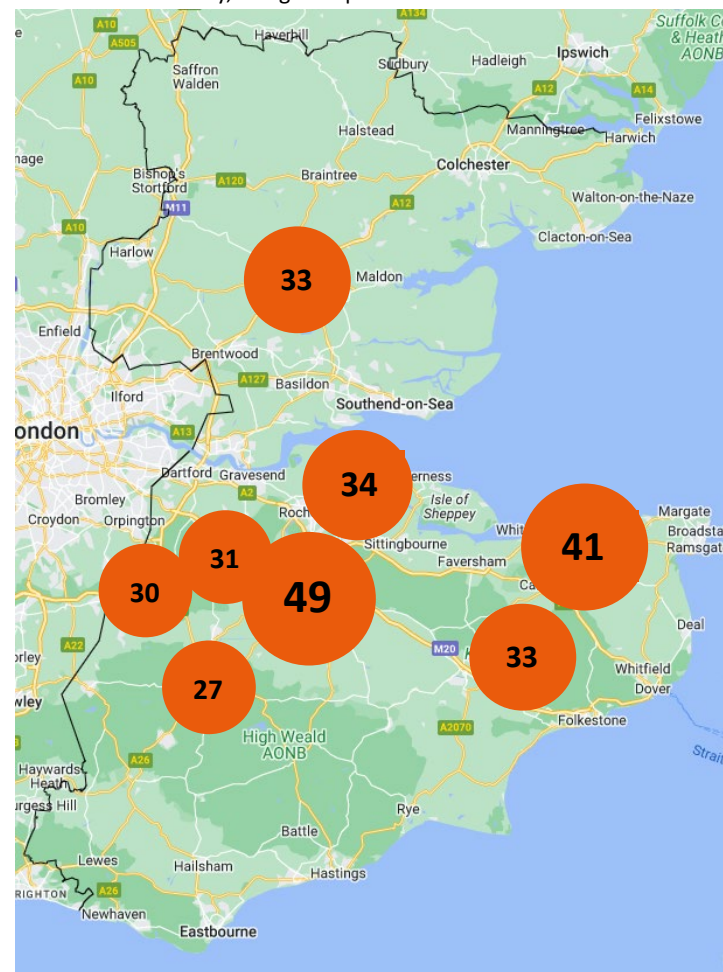
An initial review of the sector using the RTIC method identifies some **654** registered businesses across SELEP in this sector in March 2024, but with many being **micro** businesses with no published information on employee numbers or turnover. In 2023 there were 763 companies identified. Only **5** 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

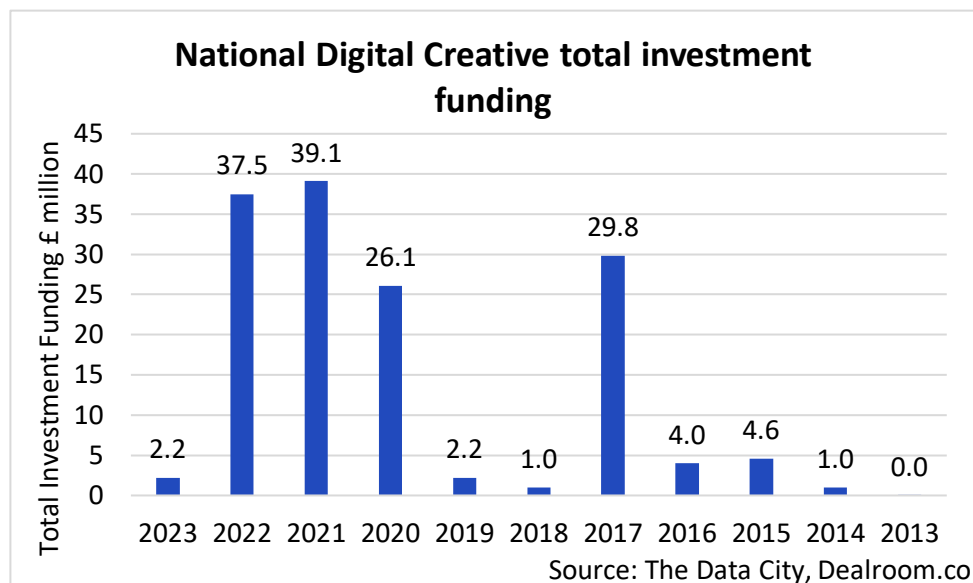
Source: The Data City, Google Maps





Of the businesses identified within the SELEP region, **all 32 local authorities were present** within the RTIC sector, with the **highest** numbers in **Maidstone (49)**, and **more than 30** in each of **Ashford, Canterbury, Chelmsford, Medway and Tonbridge and Malling**. There is a **very low** presence in **Dartford, Castle Point, Gravesham and Harlow**, with some **coastal areas** also with **quite low** presence including **Dover, Hastings, Maldon, Tendring and Rochford**.

At a national level, The Data City estimates **9,391** companies with **52,853** employees and a total turnover of **£6.3 billion**. They also estimate a **+6.6%** company growth rate per year and note that **venture capital funding** is **not increasing** as fast as other emerging sectors. Please note that these high-level summary figures are likely to be overestimates due to the methodology of their analysis.





LQ <1 = below national average
LQ = 1 = equal to national average
LQ > 1 = above national average

Digital Creative (LQ = Location Quotient)

Local Authority	Business Count	Business Count LQ	Employee LQ	Turnover LQ
Ashford	33	1.8	0.8	0.6
Basildon	21	0.8	0.3	0.1
Braintree	18	1.0	1.1	0.8
Brentwood	14	0.9	1.1	1.2
Canterbury	41	2.4	8.3	3.7
Castle Point	8	0.7	1.2	1.5
Chelmsford	33	1.3	2.3	2.0
Colchester	23	1.0	0.7	0.9
Dartford	6	0.3	0.1	0.1
Dover	10	1.0	1.3	0.9
Eastbourne	19	1.4	0.8	1.0
Epping Forest	16	0.6	0.4	0.3
Folkestone and Hythe	24	2.1	1.7	1.4
Gravesham	7	0.5	0.4	0.4
Harlow	6	0.4	0.3	0.3
Hastings	13	1.7	1.2	1.3
Lewes	18	1.9	2.3	3.8
Maidstone	49	2.1	1.8	2.4
Maldon	10	1.1	0.9	0.7
Medway	34	1.1	2.6	3.0
Rochford	12	1.2	1.3	0.8
Rother	18	1.3	0.8	1.2
Sevenoaks	30	1.3	1.1	0.8
Southend-on-Sea	23	0.7	0.7	1.1
Swale	21	1.6	52.0	81.9
Tendring	10	0.9	0.6	0.8
Thanet	24	1.6	2.0	4.2
Thurrock	10	0.4	0.2	0.1
Tonbridge and Malling	31	1.5	0.4	0.6
Tunbridge Wells	27	1.5	0.9	0.8
Uttlesford	20	1.4	1.5	1.0
Wealden	25	1.1	1.0	1.0



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 £7.9 billion in investment funding and £174 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.

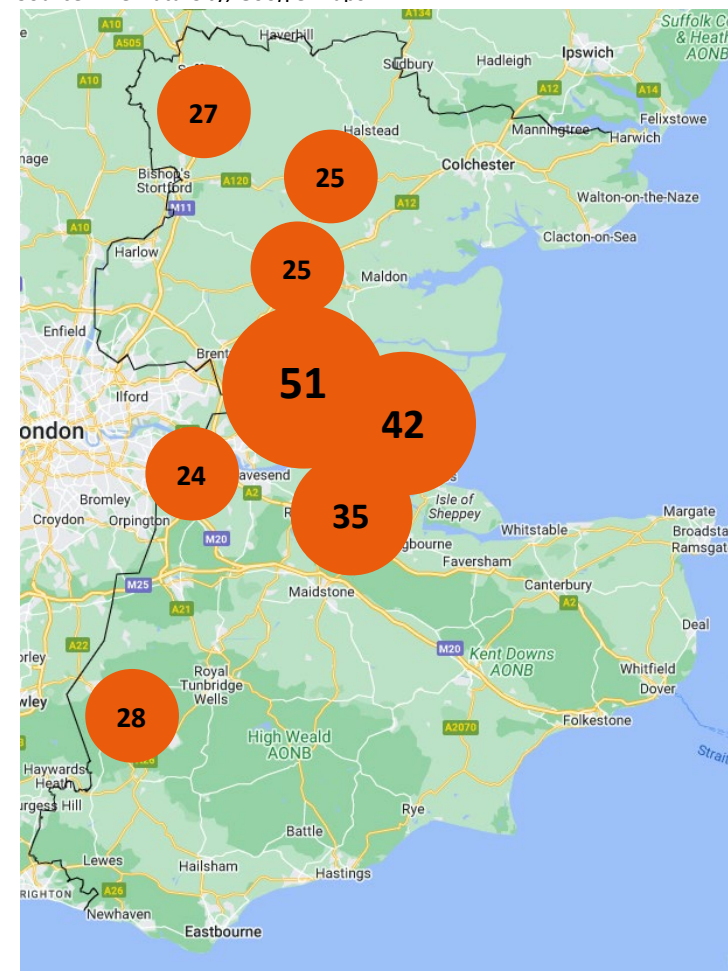
Data city defines this RTIC sector as those companies using the most innovative technologies and processes to increase productivity, often in the highest value-add parts of manufacturing sectors. This includes companies involved in Advanced Measurement, Artificial Intelligence, Augmented and Virtual 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. In March 2024 analysis identified 576 companies in this RTIC sector in the SELEP region, in 2023 there were 584 companies identified.

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

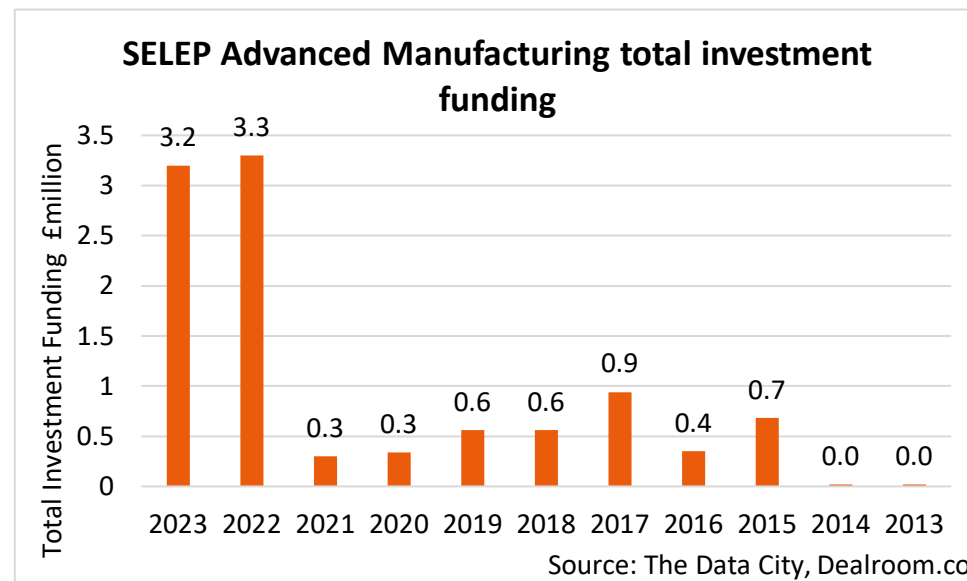
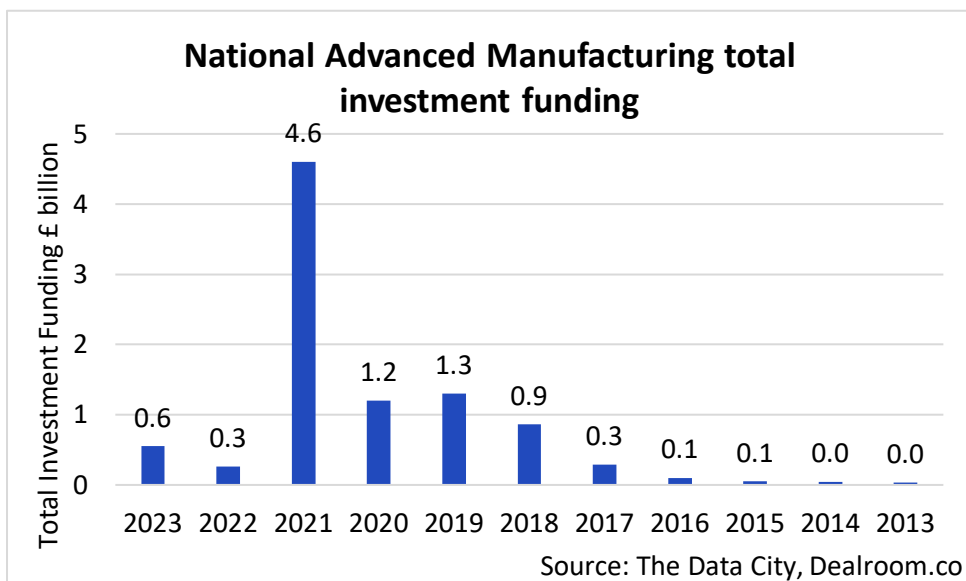
Source: The Data City, Google Maps





Of the businesses identified within the SELEP region, **all 32 local authorities were present within the RTIC sector**. **Basildon** was the **most common** location with **51** companies, **Southend-on-Sea** second (**42**) and **Medway** third (**35**). **Hastings** had the **fewest** Advanced Manufacturing companies with only **2**. **Gravesham, Rother, Folkestone and Hythe, Rochford and Lewes** all had **10 or fewer** companies within the RTIC sector.

At a national level, The Data City estimates **11,598** companies with **275,337** employees and a total turnover of **£120.6 billion**. They also estimate a **+3.7%** 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.





LQ <1 = below national average
LQ = 1 = equal to national average
LQ > 1 = above national average

Advanced Manufacturing (LQ = Location Quotient)

Local Authority	Business Count	Business Count LQ	Employee LQ	Turnover LQ
Ashford	13	0.6	0.2	0.4
Basildon	51	1.6	1.5	0.9
Braintree	25	1.2	1.9	3.6
Brentwood	11	0.6	0.5	0.5
Canterbury	17	0.8	3.1	21.2
Castle Point	14	1.0	0.8	2.8
Chelmsford	25	0.9	1.3	10.2
Colchester	21	0.7	0.1	0.2
Dartford	24	1.0	0.4	0.6
Dover	13	1.1	1.8	1.0
Eastbourne	17	1.1	0.8	1.7
Epping Forest	20	0.6	0.4	0.4
Folkestone and Hythe	10	0.8	0.3	0.2
Gravesham	7	0.4	1.3	1.0
Harlow	13	0.8	3.7	2.4
Hastings	2	0.2	0.5	1.1
Lewes	7	0.6	1.2	2.5
Maidstone	16	0.6	1.3	1.4
Maldon	14	1.3	3.7	3.6
Medway	35	1.0	1.1	1.2
Rochford	7	0.6	0.5	0.2
Rother	3	0.2	0.0	0.1
Sevenoaks	13	0.5	0.3	0.2
Southend-on-Sea	42	1.1	2.1	5.4
Swale	20	1.3	1.0	1.5
Tendring	11	0.9	1.6	2.7
Thanet	16	0.9	0.6	1.5
Thurrock	18	0.6	0.4	0.5
Tonbridge and Malling	19	0.8	0.3	0.6
Tunbridge Wells	17	0.8	0.3	0.2
Uttlesford	27	1.6	6.8	7.2
Wealden	28	1.1	1.4	2.4



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, **£8 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 and Total Investment returned to a low level of £63 million in 2023. 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**.

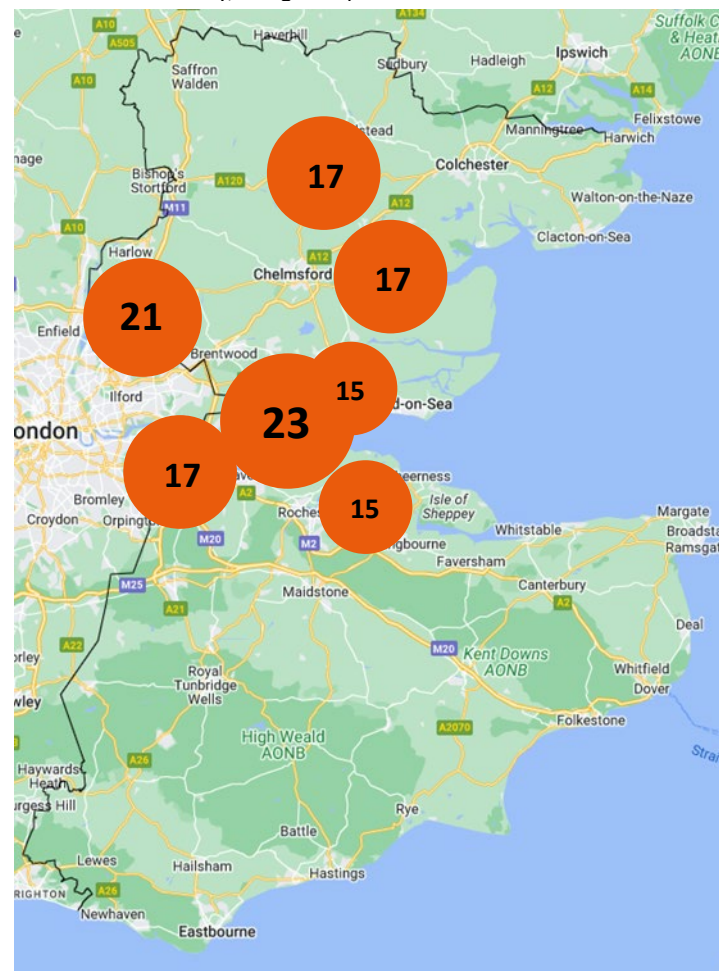
Data city defines this sector as those companies that **optimise logistics** often by **tracking products** and **improving operational efficiency** across supply chains through **innovative technology** or **processes**. This includes companies that utilise **Artificial Intelligence, Automation, Blockchain and Digital Twins, Freight Tracking Technology, Management Platforms, Service Providers and Supply Chain Visibility**. In March 2024 analysis identified **235** companies in this RTIC sector in the SELEP region, in 2023 there were 237 companies identified.

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

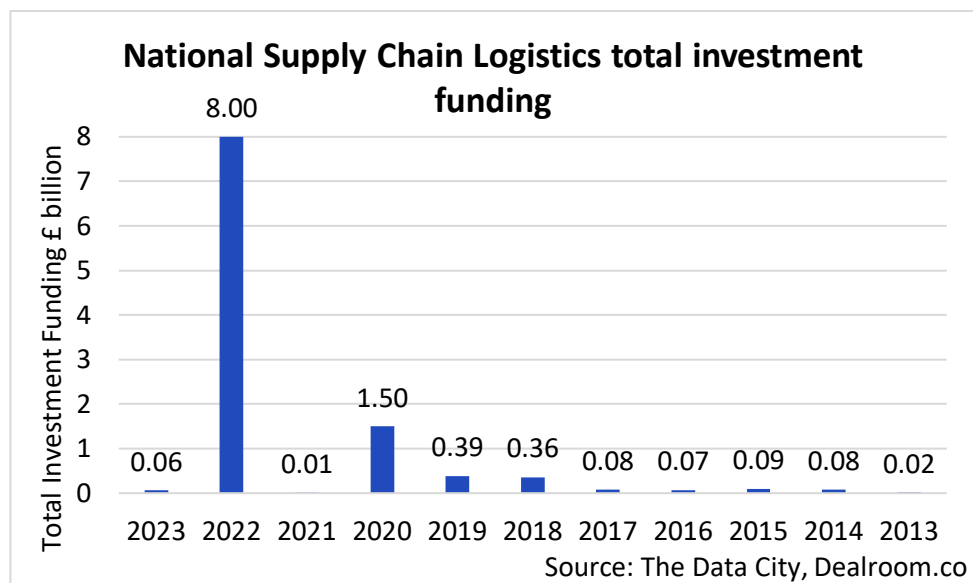
Source: The Data City, Google Maps





Of the businesses identified within the SELEP region, **31 of the 32 local authorities were present within the RTIC sector**, Eastbourne being the absent local authority. The other local authorities with the **lowest presence** in the RTIC sector, were **Ashford, Brentwood, Canterbury, Hastings, Lewes, Rother, Sevenoaks, Swale and Uttlesford** who all had between 1-3 companies within the RTIC sector. It is somewhat surprising that there is such a **low** presence across the region **coastally**, with the exception of **Medway** and **Maldon**. **Thurrock** was the **most common** local authority with **23** companies. **Dartford, Epping Forest, Braintree, Basildon, Maldon and Medway** all had between 15-21 companies operating within the RTIC sector.

At a national level, The Data City estimates **3,678** companies with **202,894** employees and a total turnover of **£59.5 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.





LQ <1 = below national average
LQ = 1 = equal to national average
LQ > 1 = above national average

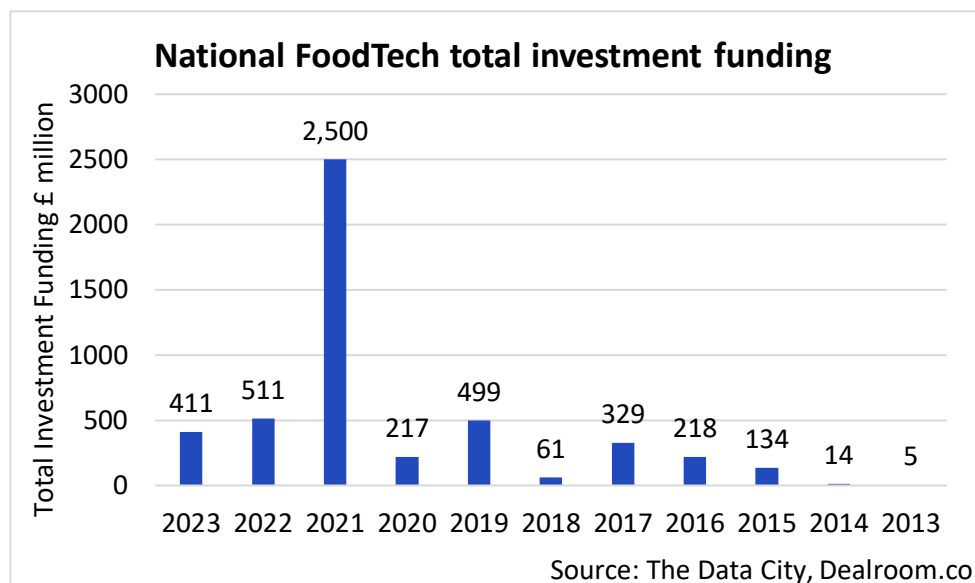
Supply Chain Logistics (LQ = Location Quotient)

Local Authority	Business Count	Business Count LQ	Employee LQ	Turnover LQ
Ashford	2	0.3	0.0	0.0
Basildon	15	1.6	0.6	2.9
Braintree	17	2.9	8.1	50.0
Brentwood	3	0.6	0.2	0.7
Canterbury	2	0.3	0.4	0.9
Castle Point	4	1.0	0.1	0.0
Chelmsford	7	0.8	0.1	0.1
Colchester	8	1.0	0.2	0.2
Dartford	17	2.6	0.3	0.1
Dover	7	2.1	1.0	0.2
Eastbourne	0	0.0	0.0	0.0
Epping Forest	21	2.3	6.9	6.0
Folkestone and Hythe	4	1.0	0.1	0.0
Gravesham	6	1.2	0.4	0.2
Harlow	5	1.1	0.2	0.2
Hastings	2	0.8	0.0	0.0
Lewes	3	0.9	0.2	0.1
Maidstone	6	0.8	0.2	0.2
Maldon	17	5.6	29.3	84.4
Medway	15	1.4	0.4	0.3
Rochford	5	1.4	0.3	0.5
Rother	3	0.7	0.1	0.1
Sevenoaks	3	0.4	0.5	1.2
Southend-on-Sea	7	0.6	0.8	1.5
Swale	3	0.7	0.0	0.0
Tendring	4	1.1	0.1	0.0
Thanet	4	0.8	0.2	0.1
Thurrock	23	2.8	2.0	2.6
Tonbridge and Malling	8	1.1	0.1	0.3
Tunbridge Wells	7	1.2	1.9	2.4
Uttlesford	3	0.6	0.0	0.0
Wealden	4	0.5	0.1	0.0



Of the businesses identified within the SELEP region, **31 of the 32 local authorities were present within the RTIC sector**, Thurrock being the absent local authority. The other local authorities with the **lowest presence** in the RTIC sector, were **Dartford, Gravesham, Hastings, Lewes, Maldon and Rochford** who all had a **single** company within the RTIC sector. **Wealden** had the **most** FoodTech companies at **10**, followed by **Medway** with **9** and **Basildon** with **8**.

At a national level, The Data City estimates **2,963** companies with **199,472** employees and a total turnover of **£55.9 billion**. They also estimate a **+1.5% 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.





LQ <1 = below national average
LQ = 1 = equal to national average
LQ > 1 = above national average

FoodTech (LQ = Location Quotient)

Local Authority	Business Count	Business Count LQ	Employee LQ	Turnover LQ
Ashford	5	1.0	0.1	0.1
Basildon	8	1.1	0.2	0.2
Braintree	4	0.8	0.2	0.2
Brentwood	3	0.7	0.0	0.1
Canterbury	6	1.3	0.4	0.4
Castle Point	3	0.9	0.1	0.1
Chelmsford	6	0.9	0.8	0.2
Colchester	3	0.4	0.1	0.0
Dartford	1	0.2	0.0	0.0
Dover	3	1.1	0.0	0.1
Eastbourne	3	0.8	0.0	0.0
Epping Forest	4	0.5	0.0	0.1
Folkestone and Hythe	3	0.9	0.2	0.2
Gravesham	1	0.2	0.0	0.0
Harlow	2	0.5	0.2	0.4
Hastings	1	0.5	0.1	0.0
Lewes	1	0.4	0.0	0.1
Maidstone	7	1.1	8.4	7.5
Maldon	1	0.4	0.0	0.0
Medway	9	1.0	0.4	0.2
Rochford	1	0.3	0.0	0.0
Rother	7	1.9	0.2	0.1
Sevenoaks	6	1.0	0.1	0.1
Southend-on-Sea	7	0.8	0.1	0.0
Swale	4	1.1	0.1	0.2
Tendring	4	1.3	0.1	0.1
Thanet	6	1.5	0.2	0.1
Thurrock	0	0.0	0.0	0.0
Tonbridge and Malling	6	1.0	0.6	0.7
Tunbridge Wells	7	1.4	0.0	0.0
Uttlesford	5	1.2	5.7	0.7
Wealden	10	1.6	0.3	0.2



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 also ran a project on **Tutor Shortages** with a specific focus on the **Construction and Engineering Sectors**.

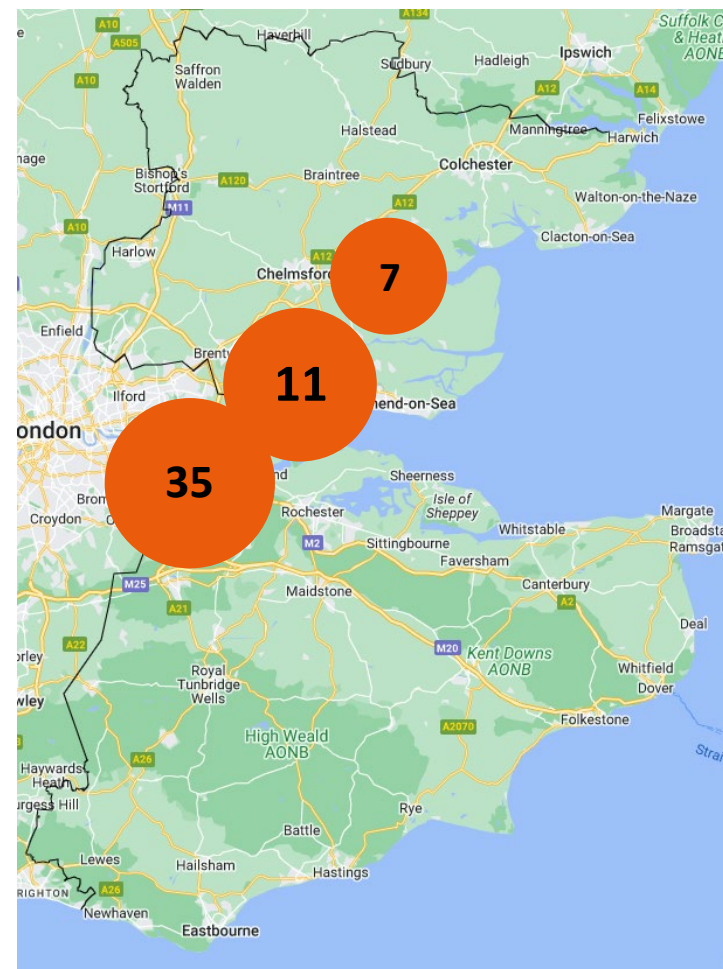
Data city defines this RTIC sector as those companies **producing buildings or parts of buildings in factories for later assembly on site**. These companies are involved in **Offsite construction, Permanent Modular Buildings and Supply Chain**. In March 2024 analysis identified **68** companies in this RTIC sector in the SELEP region, in 2023 there were 83 companies identified.

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

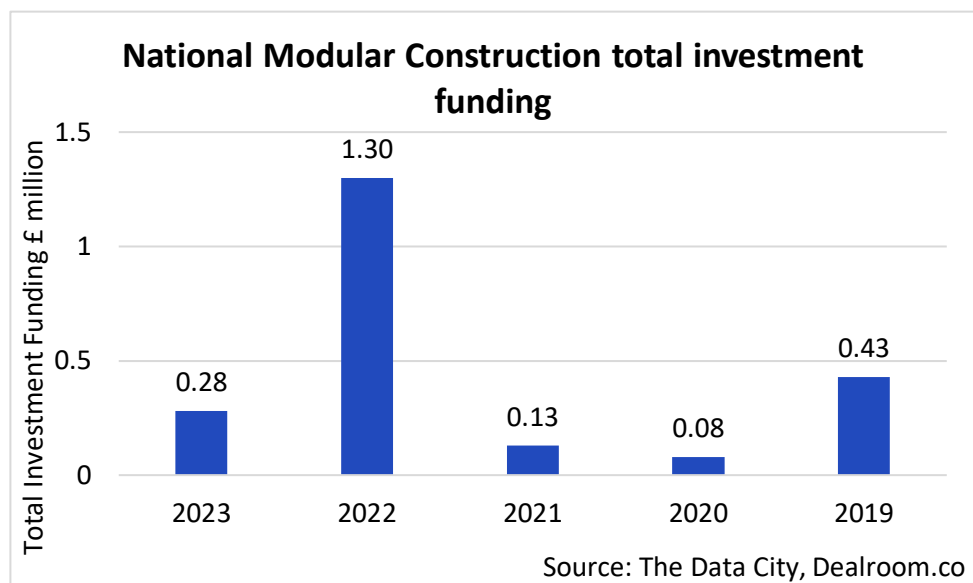
Source: The Data City, Google Maps





Of the businesses identified within the SELEP region, **15 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 **35** companies. **Basildon** and **Maldon** were the **next most common** locations with **11** and **7** companies respectively. The local authorities absent in the sector are Canterbury, **Castle Point**, **Colchester**, **Dover**, **Epping Forest**, **Folkestone** and **Hythe**, **Gravesham**, **Harlow**, **Hastings**, **Lewes**, **Rochford**, **Sevenoaks**, **Southend-on-Sea**, **Swale**, **Tendring**, **Thurrock** and **Tonbridge and Malling**.

At a national level, The Data City estimates **692** companies with **40,808** employees and a total turnover of **£12.2 billion**. They also estimate a **+4.2%** 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.





LQ <1 = below national average
LQ = 1 = equal to national average
LQ > 1 = above national average

Modular Construction (LQ = Location Quotient)

Local Authority	Business Count	Business Count LQ	Employee LQ	Turnover LQ
Ashford	2	1.7	0.4	0.2
Basildon	11	6.1	30.9	30.7
Braintree	1	0.9	0.3	0.1
Brentwood	1	1.0	0.1	0.0
Canterbury	0	0.0	0.0	0.0
Castle Point	0	0.0	0.0	0.0
Chelmsford	1	0.6	0.0	0.0
Colchester	0	0.0	0.0	0.0
Dartford	35	24.2	147.6	120.3
Dover	0	0.0	0.0	0.0
Eastbourne	1	1.1	0.9	0.3
Epping Forest	0	0.0	0.0	0.0
Folkestone and Hythe	0	0.0	0.0	0.0
Gravesham	0	0.0	0.0	0.0
Harlow	0	0.0	0.0	0.0
Hastings	0	0.0	0.0	0.0
Lewes	0	0.0	0.0	0.0
Maidstone	1	0.7	0.1	0.1
Maldon	7	11.8	3.1	11.1
Medway	2	1.0	0.2	0.1
Rochford	0	0.0	0.0	0.0
Rother	1	1.1	0.1	0.1
Sevenoaks	0	0.0	0.0	0.0
Southend-on-Sea	0	0.0	0.0	0.0
Swale	0	0.0	0.0	0.0
Tendring	0	0.0	0.0	0.0
Thanet	1	1.0	0.1	0.1
Thurrock	0	0.0	0.0	0.0
Tonbridge and Malling	0	0.0	0.0	0.0
Tunbridge Wells	1	0.9	0.0	0.0
Uttlesford	1	1.0	0.0	0.0
Wealden	1	0.7	0.0	0.0



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 **£202 million** investment in **2023**. 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**. In March 2024 analysis identified **32** companies in this RTIC sector in the SELEP region, in 2023 there were 44 companies identified.

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

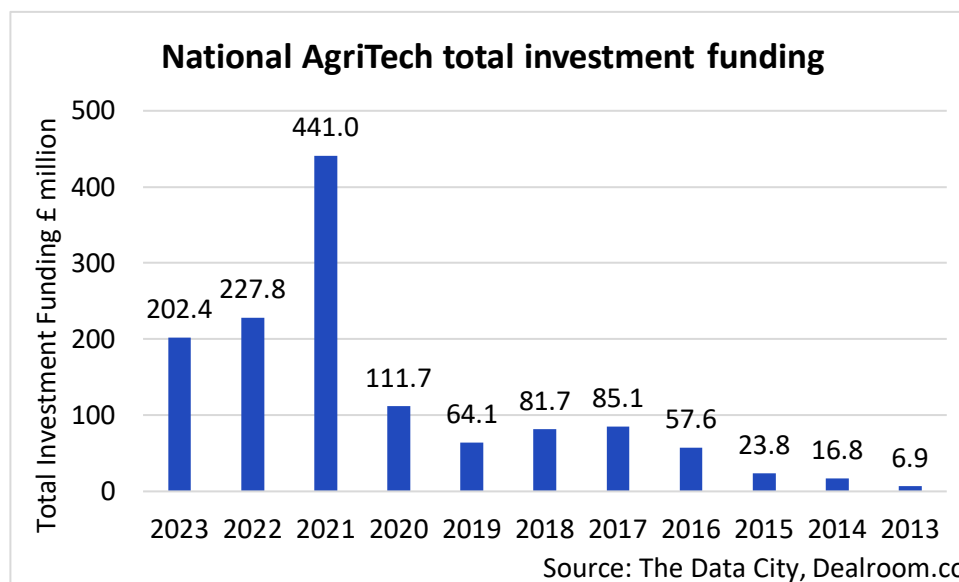
Source: The Data City, Google Maps





Of the businesses identified within the SELEP region, **25 of the 32 local authorities were present within the RTIC sector**. Epping Forest, Southend-on-Sea and Uttlesford were the local authority with the **largest presence (3)**. Brentwood, Dover, Eastbourne, Folkestone and Hythe, Harlow, Medway and Tonbridge and Malling all had **2** companies within the sector. The local authorities absent in the sector are Castle Point, Lewes, Maldon, Swale, Thurrock, Tunbridge Wells and Wealden.

At a national level, The Data City estimates **1,207** companies with **23,360** employees and a total turnover of **£13.4 billion**. They also estimate a **+6.5%** 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.





LQ <1 = below national average
LQ = 1 = equal to national average
LQ > 1 = above national average

AgriTech (LQ = Location Quotient)

Local Authority	Business Count	Business Count LQ	Employee LQ	Turnover LQ
Ashford	1	0.5	0.1	0.0
Basildon	1	0.3	0.0	0.0
Braintree	1	0.5	0.0	0.0
Brentwood	2	1.2	0.4	0.1
Canterbury	1	0.5	1.4	0.6
Castle Point	0	0.0	0.0	0.0
Chelmsford	1	0.4	0.0	0.0
Colchester	1	0.4	1.2	0.5
Dartford	1	0.5	0.0	0.0
Dover	2	1.9	0.3	0.1
Eastbourne	2	1.4	0.1	0.1
Epping Forest	3	1.0	0.8	0.3
Folkestone and Hythe	2	1.6	0.1	0.0
Gravesham	1	0.6	0.0	0.0
Harlow	2	1.3	0.0	0.0
Hastings	1	1.2	0.4	0.0
Lewes	0	0.0	0.0	0.0
Maidstone	1	0.4	0.0	0.0
Maldon	0	0.0	0.0	0.0
Medway	2	0.6	0.1	0.0
Rochford	1	0.9	0.1	0.0
Rother	1	0.7	0.2	0.1
Sevenoaks	1	0.4	0.1	0.1
Southend-on-Sea	3	0.9	0.1	0.1
Swale	0	0.0	0.0	0.0
Tendring	1	0.8	0.2	0.1
Thanet	1	0.6	0.0	0.0
Thurrock	0	0.0	0.0	0.0
Tonbridge and Malling	2	0.9	0.2	0.3
Tunbridge Wells	0	0.0	0.0	0.0
Uttlesford	3	1.9	2.4	0.0
Wealden	0	0.0	0.0	0.0



Marine and Maritime

Marine and Maritime is another logical sector to investigate given SELEP's long coastline across all three counties. Investment funding has **stepped up** in the last few years, with **£1.1 billion in investment funding** across the last four years, with **£470 million** investment in **2023** – the **largest** amount yet. Innovate UK funding was slightly **lower** in **2023** than the **2020** amount, despite **£330 million more** funding in **2023**. Before **2020** total funding was consistently **below £100 million** and has **exceeded** that benchmark since. There is a **significant** presence within the SELEP region, especially in coastal areas as is to be expected, although in some coastal authorities more than others.

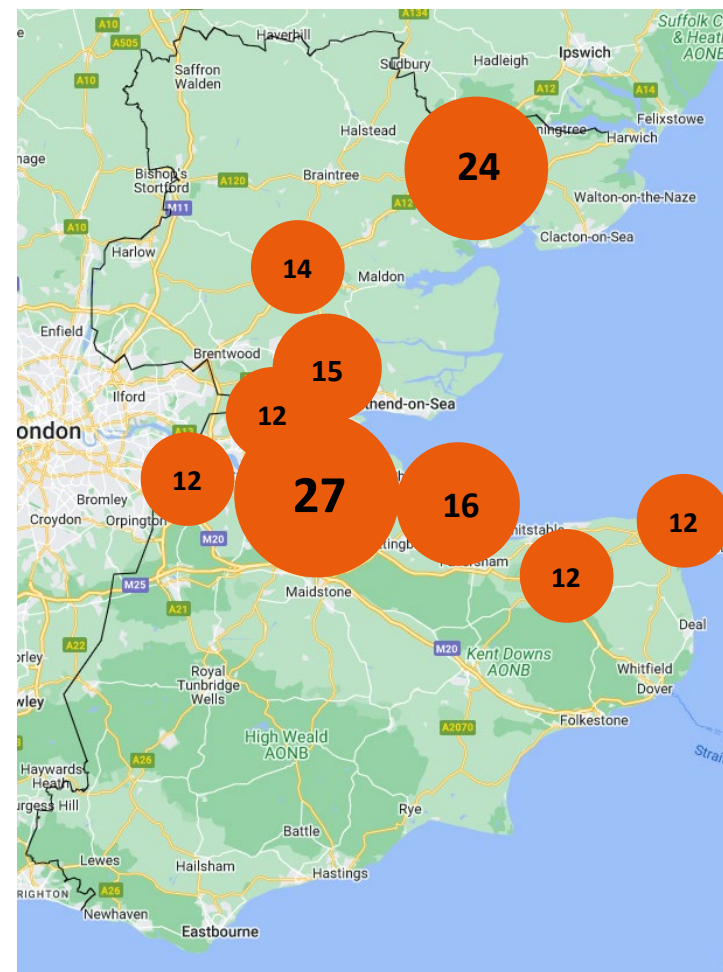
Data city defines this RTIC sector as those Companies involved in **Aquaculture, Autonomy & Robotics, Leisure, Marine Engineering & Naval Architecture, Naval Defence, Ports Ecosystem, Professional Services, Shipping – Container, bulk, RoRo and Tanker, Shipping – Cruise and Passenger and Shipping – Workboats**. In March 2024 analysis identified **276** 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, **17%** fall under the **Transportation and storage** SIC sector, **14%** are classified under **Administrative and support service activities** and **9%** come under **Manufacturing**. Again this demonstrates the difficulties that traditional SIC analysis would encounter, as the sector is fairly diffuse.

At a more detailed SIC level, the companies identified are **strongly present** in fields such as: **Other business support service activities n.e.c, Sea and coastal freight water transport, Other professional, scientific and technical activities n.e.c., Management consultancy activities other than financial management, Activities of head offices and Other service activities n.e.c.**

Business count by local authority

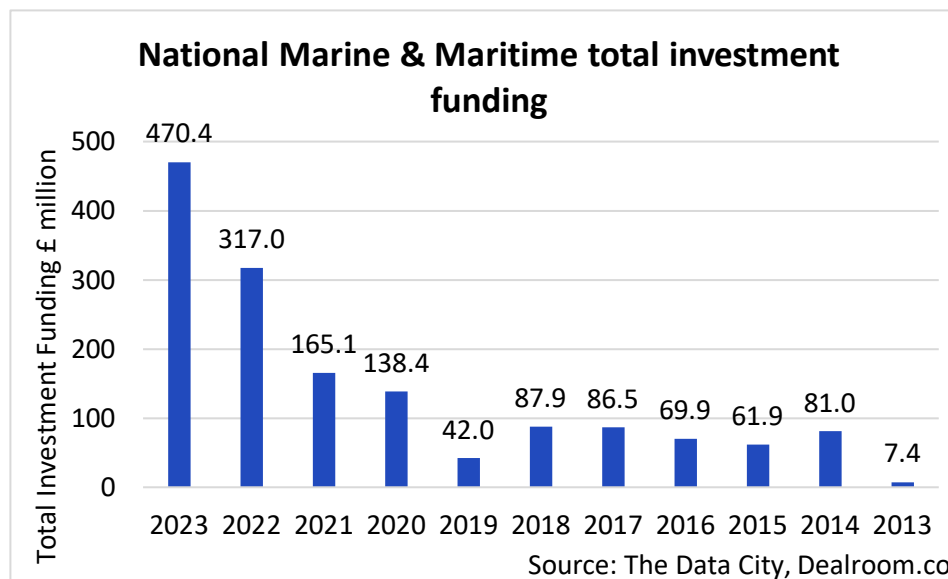
Source: The Data City, Google Maps





Of the businesses identified within the SELEP region, **31 of the 32 local authorities were present within the RTIC sector**, with **Harlow** being the absent local authority. **Medway** was the most common local authority with 27 Marine and Maritime companies. Across the coast the picture is fairly **varied**, **Castle Point (3)**, **Dover (11)**, **Eastbourne (4)**, **Folkestone and Hythe (7)**, **Hastings (3)**, **Lewes (2)**, **Maldon (10)**, **Medway (27)**, **Rochford (4)**, **Rother (4)**, **Southend-on-Sea (11)**, **Swale (16)**, **Tendring (5)**, **Thanet (12)** and **Wealden (7)**.

At a national level, The Data City estimates **5,780** companies with **248,037** employees and a total turnover of **£68.9 billion**. They also estimate a **+2.0%** 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.





LQ <1 = below national average
LQ = 1 = equal to national average
LQ > 1 = above national average

Marine & Maritime (LQ = Location Quotient)

Local Authority	Business Count	Business Count LQ	Employee LQ	Turnover LQ
Ashford	9	1.0	0.2	0.1
Basildon	15	1.1	0.6	0.9
Braintree	9	1.0	0.3	0.3
Brentwood	2	0.3	0.0	0.0
Canterbury	12	1.4	0.2	0.3
Castle Point	3	0.5	0.3	0.3
Chelmsford	14	1.1	0.3	3.4
Colchester	24	2.0	0.1	0.2
Dartford	12	1.2	0.1	0.0
Dover	11	2.2	1.7	0.6
Eastbourne	4	0.6	0.3	0.2
Epping Forest	3	0.2	0.0	0.0
Folkestone and Hythe	7	1.2	0.0	0.1
Gravesham	11	1.5	0.3	0.6
Harlow	0	0.0	0.0	0.0
Hastings	3	0.8	0.0	0.0
Lewes	2	0.4	0.3	0.2
Maidstone	6	0.5	0.0	0.0
Maldon	10	2.2	1.3	1.5
Medway	27	1.7	2.5	5.0
Rochford	4	0.8	0.1	0.0
Rother	4	0.6	0.0	0.1
Sevenoaks	5	0.4	0.1	0.0
Southend-on-Sea	11	0.7	0.1	0.3
Swale	16	2.4	1.3	2.8
Tendring	5	0.9	1.1	2.3
Thanet	12	1.6	0.2	0.4
Thurrock	12	1.0	0.4	0.3
Tonbridge and Malling	9	0.9	0.0	0.1
Tunbridge Wells	2	0.2	0.0	0.0
Uttlesford	5	0.7	0.0	0.0
Wealden	7	0.6	0.1	0.2



Cleantech

CleanTech, also known as Green Energy or Eco-Technology is a sector that has **rapidly grown** in **investment** since the term was popularised in the 1990s and contains some of the **fastest growing jobs globally**. Improving **environmental sustainability** continues to be a goal nationally and across the SELEP region, with **strong investment** levels since **2018**, **peaking** in **2023** at **£2.6 billion**. The sector has received **£8.2 billion investment** in the **last 6 years**. The sector has a **mixed presence** across the region, which is not unusual for a large sector.

Data city defines this RTIC sector as those Companies in **clean energy, environmentally sustainable product or service design and provision** such as **water purification, biofuels and other adapted goods**. These companies are involved in: **Adapted Goods, Agriculture, Forestry and Biodiversity, Energy Production, Management and Storage, Environmental Protection and Monitoring, Mining, Fuels and Biofuels and Water Processing**. In March 2024 analysis identified **189** 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 **Professional, scientific and technical activities** SIC sector, **13%** fall under the **Electricity, gas, steam and air conditioning supply** SIC sector, **11%** are classified under **Manufacturing** and **10%** come under **Administrative and support service activities**.

At a more detailed SIC level, the companies identified are **strongly present** in fields such as: **Production of electricity, Other business support service activities n.e.c., Other professional, scientific and technical activities n.e.c., Management consultancy activities other than financial management, Other research and experimental development on natural sciences and engineering, Environmental consulting activities, Activities of other holding companies n.e.c.**

Business count by local authority

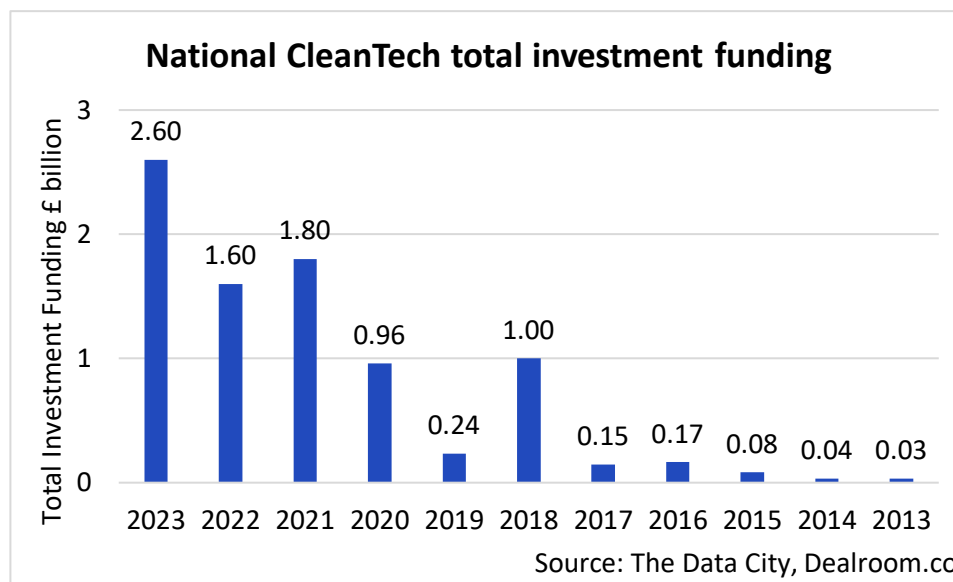
Source: The Data City, Google Maps





Of the businesses identified within the SELEP region, **31 of the 32 local authorities were present within the RTIC sector**, with Folkestone and Hythe being the absent local authority. **Uttlesford** was the **most common** local authority with **19** CleanTech companies, followed by **Tunbridge Wells (14)**, **Chelmsford (13)**, **Southend-on-Sea (12)** and **Medway (11)**. The local authorities with the **smallest presence** were **Maldon** and **Rother** with a **single company** and **Eastbourne, Harlow and Sevenoaks** each with **2 companies**.

At a national level, The Data City estimates **4,788** companies with **200,914** employees and a total turnover of **£352 billion**. They also estimate a **+9.8%** 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.





LQ <1 = below national average
LQ = 1 = equal to national average
LQ > 1 = above national average

CleanTech (LQ = Location Quotient)

Local Authority	Business Count	Business Count LQ	Employee LQ	Turnover LQ
Ashford	10	1.3	1.4	0.5
Basildon	6	0.5	0.0	0.0
Braintree	3	0.4	0.0	0.0
Brentwood	6	1.0	0.1	0.0
Canterbury	4	0.6	0.1	0.0
Castle Point	4	0.8	0.1	0.0
Chelmsford	13	1.3	0.2	0.1
Colchester	9	0.9	0.1	0.0
Dartford	6	0.7	0.2	0.1
Dover	3	0.7	0.0	0.0
Eastbourne	2	0.4	0.1	0.0
Epping Forest	4	0.4	0.0	0.0
Folkestone and Hythe	0	0.0	0.0	0.0
Gravesham	4	0.7	0.0	0.0
Harlow	2	0.3	0.0	0.0
Hastings	3	0.9	1.9	0.8
Lewes	9	2.3	0.3	0.1
Maidstone	5	0.5	0.0	0.0
Maldon	1	0.3	0.0	0.0
Medway	11	0.9	0.8	0.5
Rochford	8	1.9	0.2	0.1
Rother	1	0.2	0.0	0.0
Sevenoaks	2	0.2	0.1	0.0
Southend-on-Sea	12	0.9	0.2	0.1
Swale	6	1.1	0.2	0.1
Tendring	4	0.9	0.0	0.0
Thanet	4	0.7	0.1	0.0
Thurrock	4	0.4	0.9	1.9
Tonbridge and Malling	5	0.6	0.0	0.0
Tunbridge Wells	14	1.9	1.4	0.2
Uttlesford	19	3.2	0.6	0.1
Wealden	5	0.5	0.1	0.0



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.

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	Innovate UK funded projects since 2004, UK Research and Innovation
Exports	Regional trade in goods statistics disaggregated by smaller geographical areas
Employee jobs	Business register and Employment Survey, Office for National Statistics
PAYE employee jobs	HMRC, 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
Employment Profile	Annual Population Survey, 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
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



Skills Demand and Supply	Lightcast
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