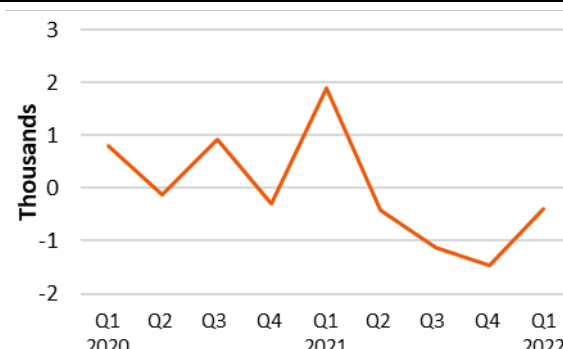




## National (UK) Context Indicators

QUARTERLY GDP		MONTHLY INDEX OF SERVICES		NET ENTERPRISE GROWTH		UNEMPLOYMENT	
<b>£569.1 bn</b>	<b>0.8%</b> ↑	<b>101.5</b>	<b>0.3%</b> ↑	<b>-820</b>	<b>18,165</b> ↑	<b>3.7%</b>	<b>-0.4%</b> ↑
Quarter to Mar-22	Improved on previous quarter	Month of Mar-22	Improved from Dec-21	Quarter to Mar-22	Improved on previous quarter	Quarter to Mar-22	Improved on previous quarter
Source: ONS	0.7% up compared to Dec-19	Source: ONS	1.5% up compared to Feb-20	Source: ONS	-14,750 down compared to 2019/20	Source: ONS	0.1% improved compared to Mar-20

## SELEP Indicators

INDICATOR	LATEST	MOVEMENT	BENCHMARK	TREND	COMMENTARY
<b>Net Business Growth</b>	<b>-400</b>	<b>1,065</b> ↑	Percentage of business stock <b>SELEP</b> -0.2% <b>UK</b> 0.0%		<p>Quarter 1 of 2022 saw continued net business closures, but to a lesser degree than the previous two quarters</p> <p>Net business closure rates since March 2021 have been significantly higher across East Sussex</p>
Source: ONS	Q1 2022	Improved on previous quarter			



INDICATOR	LATEST	MOVEMENT	BENCHMARK	TREND	COMMENTARY																				
<p><b>Claimant Count</b></p> <p>Source: DWP</p>	<p><b>98,725</b></p> <p>March 22</p>	<p><b>-5,120</b></p> <p>↑</p> <p>Improved from December</p>	<p>Percentage of pop. aged 16-64</p> <p><b>SELEP</b> 3.8%</p> <p><b>UK</b> 4.1%</p>	<table border="1"> <caption>Claimant Count Percentage</caption> <thead> <tr> <th>Month</th> <th>SELEP (%)</th> <th>UK (%)</th> </tr> </thead> <tbody> <tr> <td>Mar-20</td> <td>2.8</td> <td>2.8</td> </tr> <tr> <td>Sep-20</td> <td>6.0</td> <td>6.0</td> </tr> <tr> <td>Mar-21</td> <td>6.0</td> <td>6.2</td> </tr> <tr> <td>Sep-21</td> <td>4.8</td> <td>4.8</td> </tr> <tr> <td>Mar-22</td> <td>3.8</td> <td>4.1</td> </tr> </tbody> </table>	Month	SELEP (%)	UK (%)	Mar-20	2.8	2.8	Sep-20	6.0	6.0	Mar-21	6.0	6.2	Sep-21	4.8	4.8	Mar-22	3.8	4.1	<p>Claimant count has been reducing steadily since March 2021 but remains high compared to pre-pandemic levels</p> <p>The rate for people aged 16 to 24 has reduced most, and is now lower than for those aged 25-49</p>		
Month	SELEP (%)	UK (%)																							
Mar-20	2.8	2.8																							
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Mar-22	3.8	4.1																							
<p><b>PAYE Payroll Jobs</b></p> <p>Source: HMRC</p>	<p><b>1,829,200</b></p> <p>March 22</p>	<p><b>13,075</b></p> <p>↑</p> <p>Improved from December</p>	<p>Compared to Feb-20</p> <p><b>SELEP</b> +1.4%</p> <p><b>UK</b> +1.4%</p>	<table border="1"> <caption>PAYE Payroll Jobs (Millions)</caption> <thead> <tr> <th>Month</th> <th>SELEP (Millions)</th> </tr> </thead> <tbody> <tr> <td>Mar-20</td> <td>1.80</td> </tr> <tr> <td>Sep-20</td> <td>1.76</td> </tr> <tr> <td>Mar-21</td> <td>1.76</td> </tr> <tr> <td>Sep-21</td> <td>1.80</td> </tr> <tr> <td>Mar-22</td> <td>1.83</td> </tr> </tbody> </table>	Month	SELEP (Millions)	Mar-20	1.80	Sep-20	1.76	Mar-21	1.76	Sep-21	1.80	Mar-22	1.83	<p>Payroll jobs continue to increase and have been above pre-pandemic levels since September 2021</p> <p>However there have been net job losses in Manufacturing, and Arts &amp; Entertainment, with job growth in Health, Professional services, and Public Admin</p>								
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<p><b>New Job Postings</b></p> <p>Source: EMSI</p>	<p><b>133,400</b></p> <p>Q1 2022</p>	<p><b>36,300</b></p> <p>↑</p> <p>Improved on previous quarter</p>	<p>Compared to same quarter 2019</p> <p><b>SELEP</b> +72.1%</p> <p><b>UK</b> +68.5%</p>	<table border="1"> <caption>New Job Postings (Thousands)</caption> <thead> <tr> <th>Quarter</th> <th>SELEP (Thousands)</th> </tr> </thead> <tbody> <tr> <td>Q1 2020</td> <td>75</td> </tr> <tr> <td>Q2 2020</td> <td>45</td> </tr> <tr> <td>Q3 2020</td> <td>60</td> </tr> <tr> <td>Q4 2020</td> <td>70</td> </tr> <tr> <td>Q1 2021</td> <td>70</td> </tr> <tr> <td>Q2 2021</td> <td>85</td> </tr> <tr> <td>Q3 2021</td> <td>90</td> </tr> <tr> <td>Q4 2021</td> <td>95</td> </tr> <tr> <td>Q1 2022</td> <td>130</td> </tr> </tbody> </table>	Quarter	SELEP (Thousands)	Q1 2020	75	Q2 2020	45	Q3 2020	60	Q4 2020	70	Q1 2021	70	Q2 2021	85	Q3 2021	90	Q4 2021	95	Q1 2022	130	<p>Recent months have seen record vacancy rates, with numbers continuing to increase</p> <p>Particular hotspots for vacancies relative to the size of the local working age population include Sevenoaks, Maidstone, Dartford, Chelmsford and Lewes</p>
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**Business Resilience and Growth**

KEY ACTIVITIES	OUTPUTS/OUTCOMES	KEY INDICATORS
Delivery of the COVID-19 Recovery Fund programme, including business support activities and training for skills. <i>A detailed update is available in the Board pack</i>	1136 businesses have applied to access business support. 271 business support and visitor economy grants have been awarded totalling £593,948. Over 1100 enrolments/ referrals to skills programmes; 190 trained and into jobs and a further 236 trained/in training.	<p>Total SELEP GVA in 2019 = £98.9bn</p> <p>Enterprise 3 year survival rates (2020): SELEP 58.2%, England 53%</p> <p>Job density per 100 residents aged 16 to 64 (2020): SELEP 76, England 85 (both down compared to 2019)</p> <p>Skills level (2021): Level 4+: SELEP 36.3%, UK 43.5% Level 2+: SELEP 76.8%, UK 78.1% No Quals: SELEP 6%, UK 6.7%</p> <p>Apprenticeship starts (2020/21): 24,480. Up 2.4% from 2019/20 and 15.5% down from 2018/19</p> <p>Apprenticeship vacancies (at 23/05/22): 2,039 or 1.13 per 1,000 jobs. Increases in engineering and agriculture &amp; reductions in hospitality</p>
Continued delivery of Growth Hub services across SELEP and evolution of the Growth Hub delivery model.	Work to realign activity to new budget and more sustainable model. 3,397 interactions across 1,378 businesses (Q1, 2022), with activity significantly increased back to levels last seen in late 2020 due to extra activity through the Peer Network Programme.	
SAP/Skills activities including delivery against the Skills Strategy and Skills Report, aligning to Local Skills Improvement Plans (LSIPs) and overseeing future plans and priorities for the Digital Skills Partnership (DSP).	Continued support for the trailblazer LSIPs and for their development in Essex and Thurrock. Ongoing discussions with DCMS and South LEs to confirm future objectives for DSP.	
LGF Project: Completion of Kent and Medway Engineering, Design, Growth and Enterprise (EDGE) Hub.	Building complete and operating but additional LGF (allocated Sept 21) being spent on adaptation due to Covid-19 and delivery models around technology adoption to meet changing business needs.	
GBF Project: Harlow Library – Adult Community Learning (ACL) relocation to Harlow Library to enhance skill levels of residents.	51 jobs safeguarded and 33 housing units to be offered by seeking a refurbishment opportunity of the former ACL building.	
GBF Project: Modus, Harlow – development of mid-tech buildings providing 5 commercial operators for laboratory, R&D and advanced manufacturing.	Project complete, site open. Lettings commenced.	
GBF Project: Nexus, Harlow – Flagship multi-tenanted office building for targeted industries.	Project fit out underway.	

**KEY ACTIVITY/DEADLINES FOR NEXT QUARTER**

- Completion of COVID-19 Recovery Fund programmes.
- Monitoring of GBF projects as programme moves towards conclusion and ongoing review of projects which have received approval for retention of GBF funding beyond March 2022.
- GBF project: First and Second Floors, Building 500, Discovery Park, Sandwich (Discovery Park Incubator) - occupation of the new incubator facility to begin Q3 (construction March-August 2022. Incubator complete August 2022.
- GBF Project: Harlow Library – Adult Community Learning (ACL) to enhance skill levels of residents to complete summer 2022.



**UK's Global Gateway**

<b>KEY ACTIVITIES</b>	<b>OUTPUTS/OUTCOMES</b>
Working with Freeport East and Thames Freeport following full business case submission.	Continue to support Thames Freeport in developing its skills strategy and plan. Significant support provided to Freeport East on economic modelling, skills and innovation. FBC submitted April.
Ongoing work through Major Projects Group on skills, supply chain engagement and low carbon/sustainability.  Finalisation and implementation of skills action plan to support Major Projects Group Skills sub-group.	Skills action plan developed and shared with SWG via their joint meeting with the MPG Skills Group. A T&F group will take place on 30/06/22 to respond to the plan. MPG skills webinar held 8th June with over 50 attendees. Supply chain portal via HGP has been commissioned. MPG meeting held 25/05/22, with a focus on low carbon/sustainability ambitions.
Working with the DiT ERDF Internationalisation project supporting businesses looking to trade abroad, ensuring promotion and referrals through the Growth Hub.	As at 31/03/22, a total of £1,153,795 in grants awarded by DiT across 158 applications from businesses in SELEP area. Promotional event held 19/5/22, and last event scheduled for 29/06/22 to attract new eligible businesses to draw down the remaining ERDF allocations for the region.
South East Export Development (SEED) SSF project is working with DIT to address known export barriers in three priority sectors, working to target international markets such as US, Hong Kong, Vietnam, UAE, Ireland and South Korea.	50 Eols received with 30 businesses actively engaged to date across the UAE, Ireland, Vietnam and Canada. At least 100 SMEs exposed to new contacts and opportunities.
LGF Project: A13 Widening improving links in south Essex, including between Tilbury and London Gateway docks with the M25 and beyond.	Open to traffic as of 02/05/22. Works continue to landscape areas.

<b>KEY INDICATORS</b>
<p>Dover ferry passengers (2021): 3.1 million compared to 4.3 in 2020 and 10.9 million in 2019</p> <p>Airport passengers (Q1 2022): 3.3 million which was 53.7% of 2019 level, with UK overall passenger numbers at 51.1% of 2019 level</p> <p>Export value of goods (all countries, 2020): £8.3bn (2.9% share of England trade) of which £4.1bn was to EU countries, with overall 18% decline compared to 2019</p>

<b>KEY ACTIVITY/DEADLINES FOR NEXT QUARTER</b>
<ul style="list-style-type: none"> <li>• Responding to outcomes and actions from the MPG meeting, including working with Haven Gateway Partnership on the supply chain platform and advancing discussions on decarbonisation.</li> <li>• Continue engagement with Freeport East, including working on the implementation of the Full Business Case for the project.</li> <li>• Continue to work with Thames Freeport to develop its skills plan.</li> <li>• Continue to collaborate with industry leads and Maritime UK in our support of the sector.</li> <li>• Support local engagement with Lower Thames Crossing consultation.</li> </ul>



**Communities for the Future**

KEY ACTIVITIES	OUTPUTS/OUTCOMES	KEY INDICATORS
Housing and Development Group (HDG) to assess the Levelling Up White Paper and its impact on the housing agenda in the South East.	The HDG met on 7 <sup>th</sup> June and discussed the importance of housing to the levelling up agenda. Homes England attended the session and noted the organisation’s change of focus, from housing supply to housing regeneration. Difficulties facing the planning sector were also noted as a key barrier to growth and DLUCH would be engaged on addressing this challenge moving forward, including feedback to the Housing Minister.	Housing growth (EPC): 17,900 in 12 months to Mar-22, 6.7% increase on prior year, with 85.1% energy efficiency rating A or B.
The South East Creative Economy Network (SECEN) published their Statement of Intent, setting out a refreshed portfolio of sector-led pledges for initiatives that can be delivered in partnership (available to download on the <a href="#">SELEP website</a> ).	SECEN met on 15 <sup>th</sup> June 2022 and emphasised the importance of continued support for partnership-led activities, such as a collective response to the DCMS Creative Growth Fund Programme Opportunity. The group also agreed to explore the development of an in-person AGM for the end of the year.	Commercial space (Mar-20): 33.0 million square meters floorspace. 5 years growth - 0.9 mill sq. metre, 2.8% growth. 0.2% retail growth, 4.7% loss office space, 4.5% industrial growth, 6.8% growth other
Arts Council England/ SELEP Report ‘Creative High Streets’ finalised and published.	Following the launch of the report, SELEP and ACE are working to understand a baseline for progress and continue to engage on priorities outlined in the report, principally through regular meetings of SECEN.	Construction sector workforce (2020): 124,000 employee jobs in SELEP
SSF Project: Accelerating climate-based solutions project. (LA case study areas agreed are Swale, Lewes, Thurrock, and Colchester).	Three businesses recruited for demand analysis, a further two in pipeline. Land use and habitat mapping completed for all four LAs. Brief developed to commission a review of existing brokerage hubs in the UK.	Job density per 100 residents 16 to 64 – SELEP 4.8, England 3.5;
SSF Project: Building Back Better.	The project started in May 2022 following Board approval in February.	10.7% increase on 2019 (England reduction of 4.2%)
GBF Project: South Essex No Use Empty.	No Use Empty scheme launched 19 <sup>th</sup> April 2022.	Digital infrastructure (Jan-22), % of premises with access to Gigabit broadband – SELEP 55; England 67 – significant increase on last report as Virgin completed major upgrades
GBF Project: Seven Sisters Country Park Visitor infrastructure uplift.	Seven Sisters Country Park Visitor Centre open April 2022.	
Participation in Building Garden Communities, RIBA event on 24 May 2022.	Successful event with key note speech from Rt Hon Stuart Andrew, Minister for Housing. Attended by over 200 delegates, the event discussed the biggest opportunities and challenges faced by garden community developments.	

**KEY ACTIVITY/DEADLINES FOR NEXT QUARTER**

- Housing and Development Group discussions, with officials, about concerns in productivity due to adverse market conditions in labour and materials. Engaging local authorities and civil servants on the First Homes policy to maximise the potential benefits and mitigate unintended consequences. Focussing on the impact of the shortages of planners and delays in the system.
- Continue to provide direct industry insight into government around key issues with monthly meetings with Homes England and DLUHC officials. Seeking to establish new series meetings with new Housing Minister, Stuart Andrews.
- GBF Project: Tindal Square to complete Autumn 2022.



**Coastal Catalyst**

KEY ACTIVITIES	OUTPUTS/OUTCOMES	KEY INDICATORS
COVID-19 Recovery Fund project supporting the South East Visitor Economy, including 100% Revi-VE grant for businesses and development of place-based networks and re-boot campaigns.	139 grants have been paid out totalling £360,794 (80% of the total grant pot, with an average grant payment of £2,800).  Place re-boot campaigns will be running through Q2 and Q3, with the first being launched by Visit Kent at a network event on 21st June.	<p>Claimant rate population 16 to 64 (Mar-22): Coastal 5.1%, non-coastal 3.4%, both on reducing trend</p> <p>Gross Disposable Household Income (net household incomes after housing costs) (2018): coastal 27,000; non-coastal 30,300</p> <p>Digital infrastructure (Jan-22), % of premises with access to Gigabit broadband – coastal 43.8, non-coastal 59.7</p> <p>Net new businesses per 10,000 working age population (year to Mar-21): Coastal 15 (2.7% growth), non-coastal 8 (1.1% growth). First time in 5+ years that coastal areas saw higher business growth.</p>
Rural working group to prepare submission to the National Food Strategy.	Working group members were engaged on the National Food Strategy and feedback from this was sent through to DEFRA colleagues in March 2022.	
SSF Project: Catalyst for Culture.	Project completed: 330,668 members for performances, 14 new creative commissions, 12 dancers at the Cygnet School and 325 artist & freelancers supported.	
GBF Project: Acceleration of full-fibre broadband deployment in very rural or very hard to reach premises (Essex).	Completion of the first connections commenced in April 2022.	
GBF Project: Extension of full-fibre broadband rollout in Essex to reach rural and hard to reach premises.	Deployment phase commencing June 2022.	
GBF Project: Jaywick Market and Commercial Space.	Construction in Jaywick Market started May 2022, due to complete spring 2023.	

**KEY ACTIVITY/DEADLINES FOR NEXT QUARTER**

- Provision of regularly updated data and evidence to inform the work of the Coastal Communities Group.
- Review impacts of the Creative High Streets agenda, particularly in coastal communities, engaging with the Coastal Communities and SECEN groups.
- GBF project: Tendring Bikes and Cycle Infrastructure, which allows access to loan bikes to enable local people access to work and services – construction expected to complete Autumn 2022.
- GBF projects: Restoring the Glory of Winter Gardens and Britton Farm Development due to complete July 2022.