Tendring Economic Strategy

Socio-Economic Evidence Base

A Report by Hatch Regeneris
November 2019

Tendring District Council

Tendring Economic Strategy
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www.hatchregeneris.com

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Executive Summary

Tendring in Numbers

Employment and businesses

- The Tendring economy is comprised of 40,500 jobs and 5,200 businesses. This represents 7% of jobs in Essex and 2% of jobs in the South East LEP.
- The economy has experienced slightly slower growth in recent years relative to national and SELEP levels: 3,000 jobs have been created since 2011 and there are 500 more businesses compared to 2012.
- Tendring has low productivity levels compared to England, with £48,700 GVA per FTE. This is similar to Essex and the South East LEP.

Key sectors

- Health and care accounts for the largest share of employment – 16% of jobs are in the health and care sector with an 8% growth in jobs over the past five years.
- Construction is the largest sector in terms of businesses (16% of businesses fall into this sector) but plays a relatively minor role in terms of employment.
- The sectors with the largest job growth in recent years are tourism, ports and logistics and professional services.

Business start-ups and survival

- The business start-up rate is low relative to comparators, with 6.8 businesses started per 1,000 working-age residents.
- Tendring has better business survival and business closure rates relative to comparators.

Population and commuting patterns

- There are 9,000 self-employed residents (16%) while 6,000 people work from home.
- The Tendring population is relatively old, with 29% of residents aged 65 or over compared to only 18% nationally.
- There is a high dependency ratio of 0.84 dependents per working-age resident.
- Over the past decade, Tendring has seen an increase in its population (14%), driven by a large increase in the over 65 population.
- There is a daily net outflow of commuters of around 10,500. Colchester is the most common destination.

Qualifications and earnings

- The number of higher-level occupations, particularly manager, director and senior official roles, held by Tendring residents has grown significantly in recent years. It has grown by 35% since 2012.
- The number of higher-level occupations held by people who work in Tendring has fallen by 25% since 2012.
- Tendring has low qualification levels, with only 22% of residents holding a degree-level qualification or better (38% nationally). On the other hand, only 8% of residents have no qualifications.
- Median earnings of £27,600 for residents and £24,500 for workers are lower in Tendring than nationally. However, median earnings have grown faster than nationally since 2012.

Affordability and access

- There are some areas in Tendring with significant deprivation. 28% of Tendring's LSOAs are in the most deprived 20% nationally.
- Tendring has a high level of housing affordability, with the average house price just over 7 times the average salary.
- Tendring has a relatively average coverage of fibre broadband compared to the rest of Essex (with 88.5% fibre coverage), but it has very poor provision of ultrafast broadband, with only 0.1% of premises having the capacity to achieve it (compared to a national average of 44.1%)

Tendring SWOT Analysis

i. A set of strengths, weaknesses, opportunities and threats for Tendring is summarised below.

S

Strengths

1. The number of **high-level occupations** held by residents has grown at a fast rate in recent years.
2. Nominal **earnings** have grown at a faster rate in Tendring than nationally, for both residents and workers. However, median earnings are still below the national average.
3. There is a **low housing affordability ratio** in Tendring.
4. Tendring has a high specialisation in important sectors such as **ports & logistics** and **low carbon activities**.
5. There is a strong **business survival rate**.

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Weaknesses

1. Due to the high proportion of residents aged 65 or over, there is a **high dependency ratio** in the district.
2. There is a **low economic activity rate** and **unemployment is high**.
3. The share of residents with at least **degree-level qualifications is low**.
4. Large parts of the district, particularly on the south east coast, are **some of the most deprived areas nationally**.
5. There is **poor capacity for ultrafast broadband**. Only 0.1% of premises have that capacity.

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Opportunities

1. The strength in **low carbon activities** is well aligned with government policy, including aim for clean growth in the industrial strategy. The district could secure significant funding through this route.
2. Potential to build on Harwich's current role in the clean energy sector, especially with further investment in wind and nuclear energy expected in the near future
3. Potential to grow **ferry services** at Harwich
4. **Construction** opportunities linked to Sizewell and Bradwell, Construction Skills Centre (Colchester Institute) and housing growth.
5. **West Tendring** – opportunity to raise profile of Tendring.
6. Opportunity through this strategy to engage in discussions with **Essex CC and LEP.**
7. Potential for funding to support **coastal areas** (e.g. through Coastal Communities Fund)

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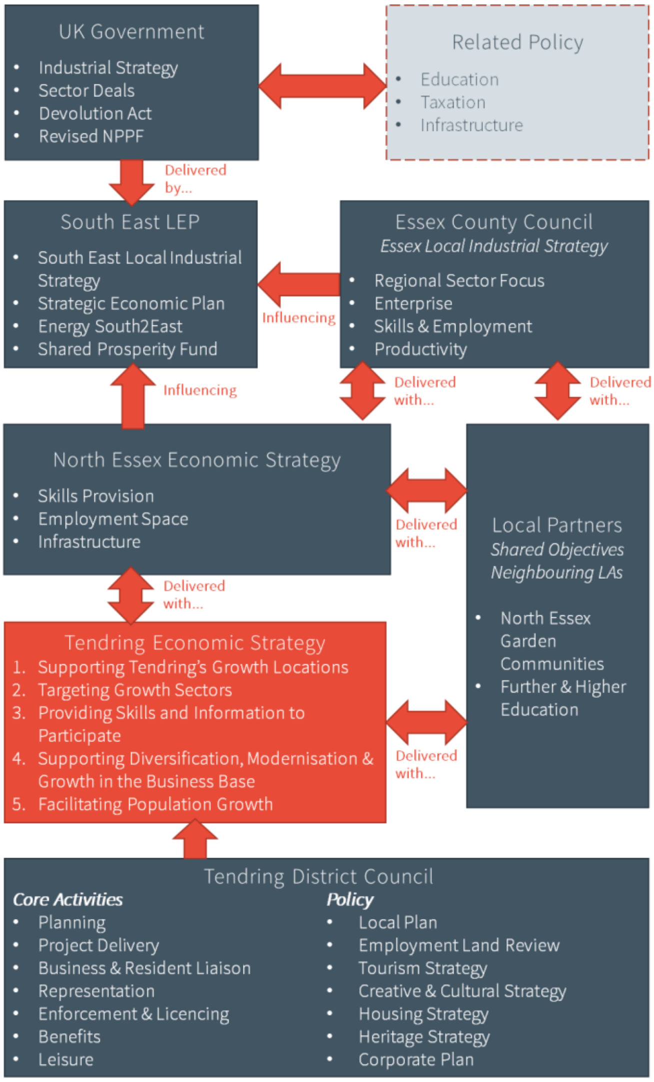
Threats

1. There is uncertainty surrounding the effects of **Brexit** on the local economy and how it will affect business and the labour market.
2. Without expansion of **transport infrastructure**, important road links could become congested.
3. Tendring faces **competition in a number of its key sectors** including from other ports such as Tilbury, Lowestoft & Great Yarmouth, and overseas low carbon businesses.
4. Tendring's relatively **old population** is expected to increase in size in the coming years. This ageing society will need to be supported.
5. Low **office rents and house prices** may influence viability/attractiveness to developers.
6. Lack of **profile and USP** for Tendring and **low aspirations** more generally.

What are the Key Strategic Messages for the Economic Strategy?

ii. The strategic context which sat behind the previous *Economic Strategy for Tendring* (2013) has undergone considerable change over the last five years.



iii. There is still a strong focus, across all strategic levels, on targeting productivity improvements through targeted sector development. The *Industrial Strategy White Paper*, *South East LEP Strategic Economic Plan*, *Economic Plan for Essex* and *Economic Vision for North Essex* all have ambitions to raise productivity levels. Sectors which are frequently mentioned (and which are of relevance to Tendring) to achieve this include advanced manufacturing, low carbon & renewables, logistics, life sciences & healthcare and creative industries.

iv. There is also recognition of the need to improve skill levels in order to address the skills deficit and to help give businesses the skills needed to grow. The Essex Employment and Skills Board (now Success Essex) identifies seven priority sectors which are set for growth and are suffering from skill shortages: advanced manufacturing and engineering, care, construction, financial & related services, health, IT, digital & creative, and logistics.

v. New alliances have been made over the last five years, including the North Essex Garden Communities and the North Essex Energy Group, which have helped to strengthen relationships with neighbouring areas. A new *North Essex Economic Strategy* has been produced to prioritise issues facing the area.

vi. Within Tendring, the recently updated *Employment Land Review* (2019) finds there is currently a more than sufficient supply of land to meet future needs. Clacton-on-Sea and Harwich continue to offer the greatest range and diversity of employment space, with other smaller markets collectively playing an important role in servicing local needs.

What are the Key Messages for the Economic Strategy?

vii. Although Tendring's economy has experienced growth since the 2013 Economic Strategy was launched, it still lags behind the rate of growth experienced by both the wider region and nationally. Employment, business and GVA growth have all slowed since 2015, with Tendring falling behind other areas.

viii. The Tendring economy is relatively diverse, without a dominant sector. The main sectors in terms of jobs are retail, health and care, tourism and education, with these sectors making up nearly 55% of all jobs in the district.

ix. Despite its relative economic diversity, Tendring still maintains a number of sector specialisms which differentiate its offer relative to the rest of the county. It has particular strengths in Ports & Logistics, Tourism, and Health & Care, with all these sectors experiencing employment growth over the last five years.

x. Tendring's population continues to have a high concentration of older people, with 29% of residents aged 65 or more (compared to 18% nationally). Tendring's recent population growth has largely been driven by the elderly population, although in recent years there has also been growth in those aged between 10 and 29 years old. It will be important to support these young people to stay in the district in the future and help develop the area's economy.

xi. Earnings continue to be low across the district, and there continues to be pockets of high deprivation, particularly around coastal communities (including Clacton-on-Sea, Harwich, Dovercourt and Jaywick).

xii. The performance across Tendring's six centres has been varied, with some performing well since the 2013 Economic Strategy, whilst others have deteriorated.

xiii. The strongest economic performance in Tendring has occurred around Harwich and Dovercourt, Frinton-on-Sea and Walton-on-the-Naze, and Brightlingsea, with all areas experiencing strong employment and business growth.

xiv. Tendring's largest economic centre, Clacton-on-Sea, has experienced a worrying economic decline over the last five years, with the number of jobs in the town centre falling by 7%. The town still maintains many of the structural challenges that were identified in the previous economic strategy, including low attainment, few people employed in high-value occupations and high unemployment. The refreshed Economic Strategy should look to prioritise the rejuvenation of Clacton-on-Sea, to ensure it becomes a thriving and viable economic centre for Tendring.

xv. Other areas of Tendring have also experienced a decline in employment since the publication of the 2013 Economic Strategy, including Jaywick, and Manningtree, Mistley & Lawford. It will be important to ensure that these areas are not left behind in developing the revised Economic Strategy.

1. Introduction

Purpose & Approach

Purpose

1.1 Having produced the ten-year Economic Strategy for Tendring (2013-2023), Hatch Regeneris was commissioned by Tendring District Council to refresh the Strategy. The new strategy will cover the period 2019 to 2024.

1.2 The purpose of this evidence base is to provide key insights into the current socio-economic performance of the district and to provide an understanding of what has changed since the 2013 Economic Strategy was produced. This will help to:

- Identify the most important questions and themes that the economic strategy must address, and
- Provide a baseline position to track future change, impact and success.

1.3 The report begins by considering the district's strategic context and that of the wider area, before assessing the district's socio-economic profile relative to comparator areas. This assessment looks at a variety of indicators including the Tendring economy; business, enterprise and inward investment; commercial space; the labour market; social inclusion; housing; and digital, transport and energy infrastructure.

1.4 The report also investigates the socio-economic characteristics of a number of key centres within the district, to understand how performance may have changed since 2013.

Approach

1.5 This evidence base brings together a wide range of socio-economic data sources to better understand the characteristics and performance of Tendring's economy. This covers a wide range of variables, including economic performance, commercial space performance, labour market, social inclusion & housing and infrastructure. Key datasets which have been used in this evidence base are detailed in the table below. In addition to this, this evidence base also includes a review of local, county-level, LEP-level and national policy and strategy documents, to understand the strategic context which currently exists in and around Tendring.

Table 1.1 Data Sources Used in this Baseline

Dataset	Latest Revision
ONS Annual Population Survey	2017
ONS Business Register and Employment Survey (BRES)	2016
ONS Annual Business Survey	2017
ONS UK Business Counts	2017
ONS Census	2011
ONS Business Demography	2016
Claimant Count	Monthly
ONS Population Estimates	2017
ONS Origin Destination Statistics	2011
Companies House	Ongoing
Index of Multiple Deprivation	2017
Annual Survey of Hours and Earnings	2017
ThinkBroadband	Ongoing

Geographies

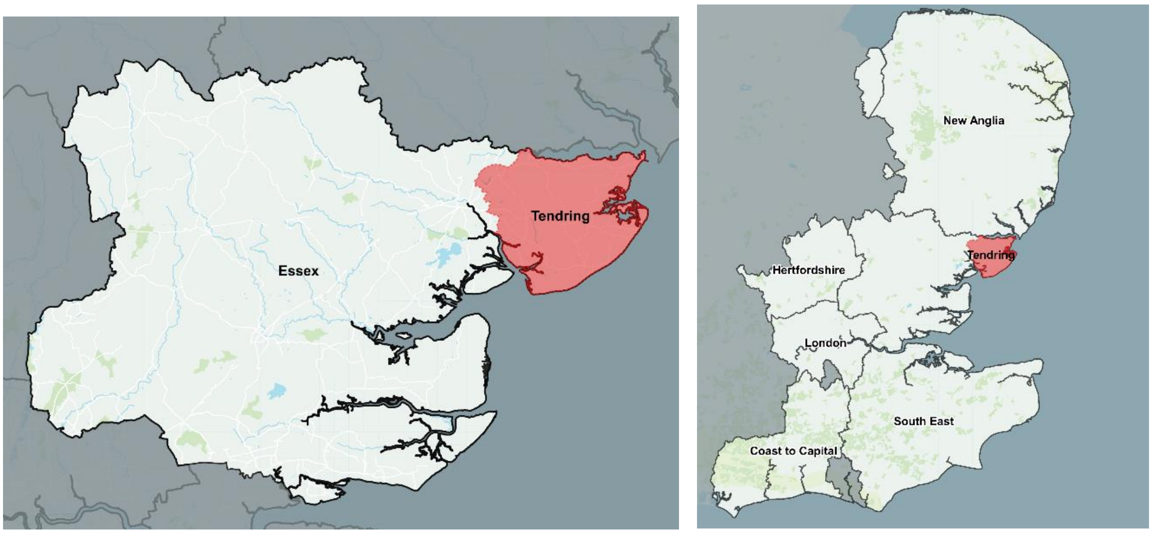
1.6 The main geography of interest for the Tendring Economic Strategy is the Tendring district. While this analysis will generally focus on the district as a whole, there has also been further analysis undertaken on a number of centres within Tendring, to show differences in economic performance across the district.

1.7 To provide context, the performance of Tendring is benchmarked throughout the document against Essex, the South East Local Enterprise Partnership (LEP) and England.

1.8 Performance against these comparators is considered throughout the analysis in Chapter 3.

Figure 1.1 Tendring District

Figure 1.2 Comparator Areas



2. Strategic Context

Implications for the Strategy:

- The strategic context which sat behind the 2013 Economic Strategy has undergone considerable change over the last five years.
- There is still a strong focus, across all strategic levels, on targeting productivity improvements through targeted sector development. The *Industrial Strategy White Paper*, *South East LEP Strategic Economic Plan*, *Economic Plan for Essex* and *Economic Vision for North Essex* all have ambitions to raise productivity levels. Sectors which are frequently referenced (and which are of relevance to Tendring) to achieve this include advanced manufacturing, low carbon & renewables, logistics, life sciences & healthcare and creative industries.
- There is also a recognition of the need to improve skills levels to both address skills shortages and help give businesses the skills needed to grow. The Essex Employment and Skills Board (now Success Essex) identifies seven priority sectors which are set for growth and are suffering from skills shortages: advanced manufacturing and engineering, care, construction, financial & related services, health, IT, digital & creative, and logistics.
- New alliances have been made over the last five years, including the North Essex Garden Communities and the North Essex Energy Group, which are aimed to strengthen relationships with neighbouring areas.
- Within Tendring, the recently updated *Employment Land Review* (2019) finds there is currently more than sufficient supply of land to meet future needs. Clacton and Harwich continue to offer the greatest range and diversity of employment space, with other smaller markets collectively playing an important role in servicing local needs.

Strategic Context: National and South East

2.1 To inform the development of the revised economic strategy and understand the context surrounding Tendring, a strategic review of relevant policies has been undertaken. This includes national, regional, sub-regional and local policies which have an influence on Tendring's refreshed Economic Strategy.

Industrial Strategy White Paper

2.2 The *Industrial Strategy* focuses on supporting the UK economy to become more productive and to drive stronger, more balanced growth. It argues that there are five foundations of productivity growth: ideas, people, business environment, infrastructure and places. It also identifies four grand challenges: Artificial Intelligence (AI) and the data economy, future of mobility, ageing society, and clean growth.

2.3 The concept of City Deals and Growth Deals has also been extended to economic sectors, through Sector Deals. Rather than the national Government researching and prioritising sectors, LEPs and local government are asked to come together themselves, setting out their ambition to grow on their own terms. The UK Government has already partnered with industry to develop Sector Deals in life sciences, construction, artificial intelligence, the automotive sector, and energy (offshore wind energy).

2.4 There are currently a number of sector deals that have been established with industry or are under discussion. Those of immediate relevance to Tendring, include: creative industries; tourism; industrial digitalisation and nuclear energy.

South East LEP Strategic Economic Plan

2.5 The *South East LEP Strategic Economic Plan* (SEP) was published in 2014, covering East Sussex, Essex, Kent, Medway, Thurrock and Southend. At the time of writing this was being refreshed, with a new Strategic Economic Statement which was launched in early 2019. This presents a number of priorities which are needed to create the conditions for growth. These include:

- Creating ideas and enterprise to create a 'smarter' economy.
- Developing tomorrow's workforce to deliver productivity gains.
- Accelerating infrastructure delivery to support future growth.
- Creating places which improve living standards and create communities to which residents and businesses aspire.
- Working together with London and other parts of the Greater South East to deliver economic growth together.

2.6 The SEP identifies the A120 corridor as a key investment area within the South East LEP area. This area includes much of North Tendring including the Harwich ports. It sees a number of investment opportunities in sectors such as environmental technologies & energy; life sciences & healthcare; advanced manufacturing; creative, cultural & the visitor economy; and logistics.

Energy South2East

2.7 The Coast to Capital, Enterprise M3 and South East LEPs have come together to create a Local Energy Strategy for the South East. It aims to drive forward local energy initiatives at a scale which will help transform the energy ecosystem, support the growth of the local carbon economy and enable significant carbon emissions savings. Tendring is identified as having the smallest emissions reduction of any local authority in the tri-LEP area over the last ten years, falling by 22% compared to an average of 31%. There are five priority themes for the strategy:

- Low Carbon Heating: incorporating the District Heat Networks rollout and off-gas grid homes.
- Energy Saving and Efficiency: including improving the energy efficiency of homes and SME support to reduce emissions.
- Renewable Generation: developing offshore wind, solar development, biomass fuel supply chain development; biofuel evolution.
- Smart Energy System: including EV charging and hydrogen fuelling system, supporting CO_2 capture development, and solar and micro-grid developments on landfill sites.
- Transport Revolution: developing CNG fleet fuelling and modernising the energy infrastructure of ports.

Strategic Context: Essex and North Essex

Economic Plan for Essex

2.8 The *Economic Plan for Essex* was published in 2014 and outlines plans to enable over 117,000 new jobs and over 81,000 new homes by 2021. The plan mainly focuses on improving skills across the Essex workforce, particularly by: closing the skills gap; investing £1bn into infrastructure in four strategic growth corridors, including the A120; and enhancing productivity within the Essex economy, focusing support on five growth sectors.

2.9 The five key growth sectors considered in the *Economic Plan* are advanced manufacturing, low carbon & renewables, logistics, life sciences & healthcare and digital, cultural & creative.

2.10 For Tendring, the *Economic Plan* sees similar investment opportunities to those outlined in the *South East LEP SEP*.

Essex Employment and Skills Board (now Success Essex)

2.11 The Success Essex Board was established due to a mismatch between skills acquired by the workforce and skills required in Essex. The Board works with large employers, academic institutions, SMEs and local government to solve the skills challenges many industries face. They also look to support people into training opportunities to develop their career.

2.12 They identify seven priority sectors which are set for growth and are suffering from skill shortages: advanced manufacturing and engineering, care, construction, financial & related services, health, IT, digital & creative, and logistics.

Economic Vision and Strategy for the North Essex Sub-Region

2.13 In January 2017, a group was set up to deliver three garden communities in North Essex. These are expected to be located at West of Braintree, Colchester-Braintree Borders and Tendring-Colchester Borders. An economic vision and strategy was required to shape the area's economic, social and environmental development over the coming decades. This is being taken forward by a separate Board to the NEGC and is being led by Essex County Council and relevant local authorities (including Tendring). There are plans that, in the long-term, the three garden communities will house approximately 120,000 people and provide 43,000 jobs. The document identifies a range of strategic opportunities, including links to Stansted Airport and the University of Essex. The report discusses some opportunities for supporting the development of the sub-region. These include: nuclear energy projects; renewable energy; expansion of University of Essex and university-business partnerships; London-Stansted corridor; and other opportunities in the Greater South East.

North Essex Energy Group

2.14 The North Essex Energy Group is a partnership between the North Essex authorities, the Haven Gateway Partnership, Hutchinson Ports, University of Essex and Colchester Institute. In late 2017, they convened a facilitated workshops on the strategic priorities in the energy, renewables and wider low carbon sectors for North Essex. The discussion was intended to understand the challenges and opportunities for the energy sector in North Essex, to explore the options for unlocking local growth and to develop a clear roadmap for collective action. Eight recommendations were developed, including: raising awareness of new opportunities; a need for investment funding and helping businesses to navigate the complex support landscape; strengthening the regional proposition for inward investment; investment in supporting infrastructure; skills & training support; and proactive planning and investment to secure major projects. Significant opportunities which are identified in energy for North Essex over the next 10 years includes the construction of Sizewell C and Bradwell B nuclear power stations, new investment in 5GW of offshore wind farms in the Southern North Sea, £17bn to be spent decommissioning oil and gas production infrastructure and piloting new energy generation, and storage technologies in three new garden communities.

Strategic Context: Tendring

Economic Strategy for Tendring

2.15 The most recent *Economic Strategy for Tendring* was published alongside *the Employment Land Review* in 2013. The publication gives a detailed review of the economy in Tendring and produces a number of recommendations. The report discussed five objectives:

- Supporting Tendring's growth locations of Harwich, Clacton and the West of Tendring
- Targeting growth sectors including offshore energy and care & assisted living
- Ensuring residents have the skills and information to participate in the opportunities promoted in the strategy
- Support modernisation, diversification and growth within the business base
- Facilitate population growth where it supports economic objectives

Tendring Local Plan

2.16 The *Draft Tendring District Local Plan* was submitted in 2017 and covers the period up to 2033. Due to strategic cross-boundary policies and allocations, Section 1 of the plan also includes North Essex.

2.17 In terms of the discussion on employment space provision, the Plan acknowledges opportunities for Tendring to develop strengths in offshore wind and in care & assisted living.

2.18 The document suggests that there will be annual employment growth of 490 jobs in Tendring. The analysis suggests that there is a requirement for the provision of between 20 and 38 ha of additional B use employment land in Tendring between 2016 and 2033. The Plan suggests that there will be a need for between 65 and 137.1 ha of B use employment land across the whole of north Essex (including Braintree and Colchester).

2.19 Tendring District Council submitted their Local Plan to the Secretary of State on 9th October 2017. The Examination of Section 1 of the Local Plan took place in January 2018.

2.20 The Inspector has confirmed that he is broadly happy with the targets set out within the Draft Local Plan including an objectively assessed need (OAN) figure of 550 dwellings per annum (dpa). Following modifications by Tendring District Council, the employment land requirement was adjusted to between 12 ha and 20 ha employment land up to 2033. The Inspector has accepted this target, though further evidence is required to support proposals for the North Essex Garden Communities.

Employment Land Review, 2019

2.21 Alongside the development of an updated economic strategy, the *Employment Land Review* for Tendring has also been updated.

2.22 The demand assessment undertaken suggests that there is an overall requirement of between -1.41 ha (Labour Supply scenario) and 8.7 ha (Past Completions scenario).

2.23 In terms of supply, a total of 44.23 ha with planning approval has been identified, comprising of the following:

- 16.63 ha of employment land allocations
- 27.6 ha of additional sites with employment land planning permission (outline or detailed)

2.24 In quantitative terms, at a district level, there is more than sufficient supply of land to meet future needs even if the most optimistic scenario (8.7 ha) is adopted.

2.25 A more qualitative assessment of employment land and floorspace finds that Clacton and Harwich continue to offer the greatest range and diversity of employment space, with other smaller markets collectively playing an important role in servicing local needs (e.g. Ardleigh & Elmstead Market). In terms of office space, there is a need to encourage the delivery of smaller scale mixed units with flexible terms to support newly established businesses.

3. Tendring Socio-Economic Profile

Implications for the Strategy

- Although Tendring's economy has experienced growth since the 2013 Economic Strategy, it still lags behind the rate of growth experienced by both the wider region and nationally. Employment, business and GVA growth have all slowed since 2015, with Tendring falling behind other areas.
- The Tendring economy is relatively diverse, without a dominant sector. The main sectors in terms of jobs are retail, health and care, tourism and education. These sectors make up nearly 55% of all jobs in the district.
- Tendring still maintains a number of sector specialisms which differentiate its offer relative to the rest of the county. It has particular strengths in Ports & Logistics, Tourism, and Health & Care, with all these sectors experiencing employment growth over the last five years.
- Tendring's population continues to have a high concentration of older people, with 29% of residents being aged 65 or more (compared to 18% nationally). Tendring's recent population growth has largely been driven by the elderly population, although in recent years there has also been growth in those aged between 10 and 29 years old. It will be important to support these young people to stay in the district in the future and help develop the area's economy.
- Earnings continue to be low across the district, and there continues to be pockets of high deprivation, particularly around coastal communities (including Clacton-on-Sea, Harwich & Dovercourt and Jaywick).

Introducing the Economy

Recent Performance

3.1 The Tendring economy has had a mixed performance since the 2013 Economic Strategy was produced, with growth occurring across employment, businesses and GVA. However, this has not been as strong as experienced by other comparator areas including Essex, the South East LEP and England.

3.2 Table 3.1 provides key figures relating to the Tendring economy. As seen below, there are currently around 40,500 people employed in Tendring, comprising around 7% of all jobs in Essex. Employment in both Tendring and wider Essex has grown by 7% over the past five years.

3.3 Tendring is also home to around 5,200 businesses. With only an 11% growth over the past five years, growth in the number of businesses in Tendring has been much slower than Essex (17%) and England as a whole (22%).

3.4 Tendring generated £4.3 billion of GVA in 2015, which equated to £48,700 per FTE worker. This is significantly lower than the national GVA per FTE worker but marginally better than Essex and the SELEP. Productivity growth has also been relatively weak in Tendring relative to the comparator areas.

Table 3.1 Summary of the Tendring Economy

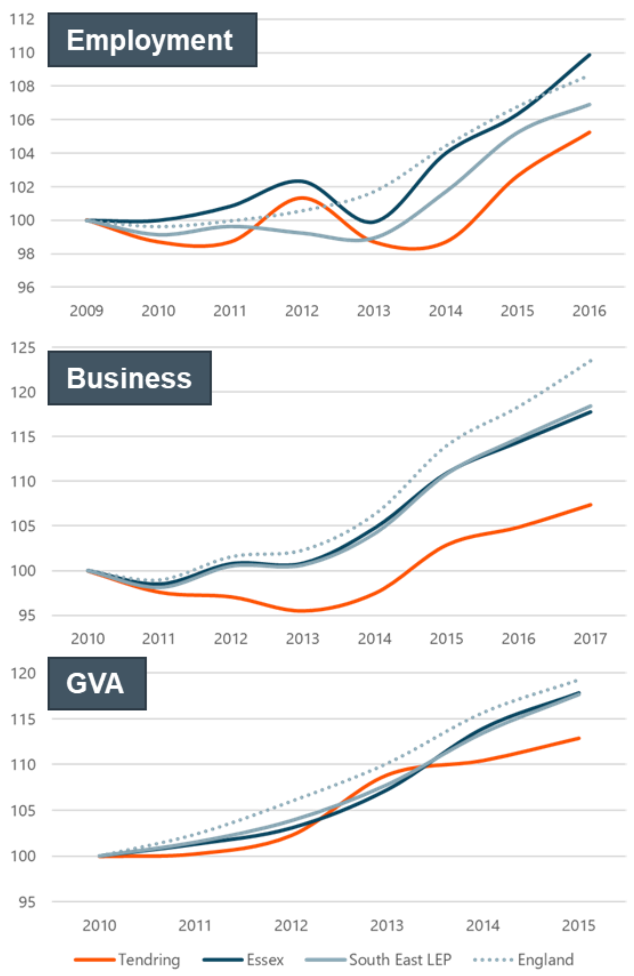
	Tendring	Essex	South East LEP	England
No. of jobs, 2016	40,500	595,500	1.6m	26.4m
Employment change (2011-16)	+7%	+7%	+9%	+9%
No. of businesses, 2017	5,200	72,100	195,000	2.7m
Business change (2012-17)	+11%	+17%	+18%	+22%
GVA, 2015	£4.3bn	£63.3bn	£171.6bn	£3809.3bn
GVA per FTE worker	£48,700	£48,400	£46,600	£63,700
Productivity growth (2010-15)	+5%	+8%	+9%	+10%

Source: BRES, 2009-16, UK Business Count, 2010-17

3.5 Figure 3.1 illustrates changes across Tendring and comparator economies since 2009 and 2010.

3.6 Tendring GVA growth tended to keep pace with the comparator areas leading up to 2013. It has fallen behind in this regard since 2013.

Figure 3.1 Recent Changes in Employment, Business & GVA



Source: BRES, 2009-16, UK Business Count, 2010-17

Note: Indexed, with 2009 = 100

Composition of the Economy

3.7 Figure 3.2 presents the composition of the Tendring economy, illustrating its various sector strengths and weaknesses.

3.8 The Tendring economy is relatively diverse, without a dominant sector. The main sectors in terms of jobs are **retail, health and care, tourism and education**. These sectors make up nearly 55% of all jobs in the district.

3.9 Tendring has a number of employment specialisms which differentiate it from the national economy. These are:

- **Ports & Logistics** – 1.5 times more specialised compared to England, with around 2,250 jobs
- **Tourism** – 1.3 times more concentrated compared to England, with around 5,000 jobs
- **Health and Care** – 1.3 times more specialised compared to England, with around 6,500 jobs.

3.10 Tendring also has a specialism in terms of cross-cutting low carbon and energy activities, where it is 1.8 times more specialised than England in terms of businesses.

3.11 Tendring also has a number of growth sectors. In terms of the number of jobs created in the past five years, the most significant growth sectors are **tourism, health & care, and ports & logistics. ICT & Digital** employment has also experienced growth, albeit from a very low base.

Figure 3.2 Composition of the Economy

Sector		Businesses				Employment			
		UK Business Count				BRES			
		2017			Change	2016			Change
		No.	%	LQ	2012-17	No.	%	LQ	2011-16
Creative & Professional	**Creative Services**	325	6%	0.7	10%	1,000	2%	0.5	0%
	Business Support	340	7%	0.7	31%	2,500	6%	0.7	17%
	ICT & Digital	35	1%	0.7	17%	230	1%	0.7	229%
	Professional and Financial	660	13%	0.6	29%	2,375	6%	0.4	27%
	Other Services	220	4%	1.2	22%	800	2%	0.9	-10%
Support Industries	**Ports & Logistics**	185	4%	1.0	3%	2,250	6%	1.5	20%
	Transport	160	3%	1.1	-14%	2,125	5%	1.7	-11%
	Construction	820	16%	1.5	22%	2,500	6%	1.3	18%
	Wholesale	175	3%	0.8	-3%	1,500	4%	0.9	20%
Local Services	Retail	785	15%	1.3	-2%	6,500	16%	1.5	0%
	Tourism	480	9%	1.1	5%	5,000	12%	1.3	35%
Industrial	Manufacturing	310	6%	1.3	9%	3,000	7%	0.9	0%
	Adv. Manufacturing	115	2%	1.5	21%	1,375	3%	1.1	22%
	Utilities and Waste	30	1%	1.1	0%	475	1%	1.2	19%
Public Services	**Health and Care**	350	7%	1.2	-4%	6,500	16%	1.3	8%
	Public Admin	50	1%	1.4	-9%	1,375	3%	0.9	-8%
	Education	130	3%	1.0	24%	4,250	10%	1.2	-11%
Total Jobs / Businesses		5,200				40,500			
Low Carbon/Energy		300	6%	1.8	0%	1,300	3%	1.0	8%

Source: BRES, 2011, 2016, UK Business Count, 2011, 2017 Note: The sub-sectors included are not comprehensive and the sum of jobs and businesses do not necessarily add up to the total. Location Quotient calculated as the percentage of jobs/businesses in a given sector in Tendring divided by the percentage in that sector in England.

Key Sectors

3.12 The following section analyses some key sectors in greater depth. It looks at businesses and jobs, broken down by local centres and sub-sector specialisms, as well as key assets, opportunities and threats.

3.13 The sectors which are the focus of this Section are summarised in Table 3.2, together with some headline figures on their performance.

Table 3.2 Key Sectors Profile

	Existing & Core Sector Strengths					
	Ports & Logistics	Tourism	Health & Care	Advanced Manufacturing	Low Carbon Activities	Rest of the Economy
Number of Jobs	2,250	5,000	6,500	1,375	1,300	40,500
Level of Specialisation	1.5	1.3	1.3	1.1	1.0	1.0
Employ. Growth	+20	+35	+8	+22	+8	+7

Source: BRES, 2011, 2016

Ports and Logistics

3.14 This sector includes freight transport, cargo handling, operation of warehouses, postal activities and transport support activities.

CURRENT OVERVIEW

JOBS (2016)

Number	2,250
% of all jobs	6%
LQ vs GB	1.5
% Change (2011-16)	+20%

BUSINESSES (2017)

Number	185
% of all businesses	4%
LQ vs GB	1.0
% Change (2012-17)	+3%

LOCAL SPECIALISMS

Water Transport Services
700 jobs; LQ = 15.1

Water Freight Transport
40 jobs; LQ = 3.4

Road Freight Transport
600 jobs; LQ = 1.1

KEY LOCATIONS

Location	Jobs (2016)	LQ vs. England
Brightlingsea	170	2.1
Clacton-on-Sea	300	0.6
Frinton-on-Sea and Walton-on-the-Naze	45	0.4
Harwich and Dovercourt	1,000	4.0
Jaywick	5	0.5
Manningtree, Mistley and Lawford	80	1.2

KEY ASSETS

- Haven Gateway is a nationally important cluster of ports.
- Harwich International Port is used for international ferry services.
- The port is also used for freight container vessels and for cruises.
- Galloper Offshore Wind Farm has established its O&M base in Harwich.
- The strategic road network (particularly the A12 and A120) offers connections across the East of England and towards London.

OPPORTUNITIES

- The sector was identified as a key sector in the Essex Growth Strategy and South East LEP SEP.
- The ports and logistics sector combines well with other prominent sectors in Tendring, including low carbon activities and construction.
- There will be continued high investment in R&D and improved technology through collaboration between higher education institutions and ports.

THREATS

- There is significant competition from other ports including Tilbury.
- Brexit may cause issues affecting ease of imports and exports.
- The sector increasingly needs higher skilled workers and will need to attract younger people to replace an ageing workforce.
- Transport connectivity is very important. At present, road infrastructure can get congested, causing delays.

Tourism

3.15 This sector includes holiday accommodation, restaurants and cafés, and cultural and visitor attractions.

CURRENT OVERVIEW

JOBS (2016)

Number	5,000
% of all jobs	12%
LQ vs GB	1.3
% Change (2011-16)	+35%

BUSINESSES (2017)

Number	480
% of all businesses	9%
LQ vs GB	1.1
% Change (2012-17)	+5%

LOCAL SPECIALISMS

Camping Grounds & Trailer Parks
750 jobs; LQ = 12.2

Tour Operator Activities
125 jobs; LQ = 2.3

Hotels
950 jobs; LQ = 1.4

KEY LOCATIONS

Location	Jobs (2016)	LQ vs. England
Brightlingsea	190	0.9
Clacton-on-Sea	1,375	1.0
Frinton-on-Sea and Walton-on-the-Naze	550	2.1
Harwich and Dovercourt	1,250	2.0
Jaywick	80	2.9
Manningtree, Mistley and Lawford	275	1.6

KEY ASSETS

- The coastal location has given rise to several seaside resorts. There are particularly prominent resorts in Clacton, Walton and Frinton.
- These resorts are home to piers, beaches and seaside gardens.
- There is a strong tourist accommodation offer, with caravan parks and hotels well-established in the main towns.
- Large events in the local area are important in helping to draw in people to the area (including the Clacton Airshow).

OPPORTUNITIES

- As the population increases, demand for culture and tourism will also increase. This is particularly the case with Tendring's active elder population.
- The weaker pound could make holidays in the UK more attractive than elsewhere for both foreign tourists and Britons.
- World Travel and Tourism Council (WTTC) expects the UK tourism sector to grow by 3.2% per annum between 2015-25. Tendring should try to capitalise on this growth.

THREATS

- The market is highly competitive, both domestically and internationally. Other day-trip locations for Londoners such as Oxford and Cambridge have experienced fast growth in recent years.
- Jobs in the sector tend to be low value and seasonal in nature. The expansion of this sector could limit the potential for economic development in the area. It is also possible that the sector will see labour shortages if there is a reduction in immigration following Brexit.

Health and care

3.16 This sector includes medical, dental and other health activities, nursing care, social work and childcare.

CURRENT OVERVIEW

JOBS (2016)

Number	6,500
% of all jobs	16%
LQ vs GB	1.3
% Change (2011-16)	+8%

BUSINESSES (2017)

Number	350
% of all businesses	7%
LQ vs GB	1.2
% Change (2012-17)	-5%

LOCAL SPECIALISMS

Elderly and Disabled Residential Care
1,375 jobs; LQ = 3.2

Other Residential Care
1,000 jobs; LQ = 2.6

Social Work Activities
950 jobs; LQ = 1.8

KEY LOCATIONS

Location	Jobs (2016)	LQ vs. England
Brightlingsea	240	0.8
Clacton-on-Sea	2,750	1.5
Frinton-on-Sea and Walton-on-the-Naze	600	1.7
Harwich and Dovercourt	500	0.6
Jaywick	130	3.5
Manningtree, Mistley and Lawford	140	0.6

KEY ASSETS

- The University of Essex has research strengths in health and care, and is home to the Essex Biomedical Science Centre.
- There is already a strong healthcare and life sciences sector in West Essex.
- There is a large residential care sector in Tendring, driven by its significant number of care homes.

OPPORTUNITIES

- It is a key sector due to the UK's ageing population.
- The ageing population is identified as a key challenge in the Industrial Strategy.
- Technological improvements could create a requirement for more specialised and more skilled care workers, creating higher value jobs in the area.
- There is evidence that consumers are spending greater amounts on health-related products and services than was previously the case.

THREATS

- Technological improvements could lead to activities becoming more automated, potentially reducing the demand for labour in the care sector.
- However, there is limited evidence of higher value health and care activities currently in Tendring.
- Declining public sector funding in recent years has made it difficult for local authorities to support local public services.

Low carbon activities

3.17 This sector includes decarbonising the energy system, improving resource efficiency, preserving and enhancing the natural environment and multi-disciplinary activities.

CURRENT OVERVIEW

JOBS (2016)

Number	1,300
% of all jobs	3%
LQ vs GB	1.0
% Change (2011-16)	+8%

BUSINESSES (2017)

Number	300
% of all businesses	6%
LQ vs GB	1.8
% Change (2012-17)	0%

KEY LOCATIONS

Location	Jobs (2016)	LQ vs. England
Brightlingsea	80	1.2
Clacton-on-Sea	550	1.2
Frinton-on-Sea and Walton-on-the-Naze	40	0.4
Harwich and Dovercourt	50	0.2
Jaywick	5	0.5
Manningtree, Mistley and Lawford	40	0.7

Note: Low carbon activities were calculated using the Hatch Regeneris Low Carbon Model, which cannot be used to effectively establish sub-sector specialisms

KEY ASSETS

- Key infrastructure is already in place in Harwich for the operation and maintenance of offshore energy generation at the Galloper Offshore Wind Farm.
- The Energy Skills Centre in Harwich aids local skills development, particularly skills suited to supporting the offshore wind industry.

OPPORTUNITIES

- One of the four challenges in the Industrial Strategy is working out how to deliver clean growth. This sector is key to solving this problem.
- Government produced a Clean Growth Strategy in 2017, outlining a blueprint for a low carbon future.
- A number of Tendring's significant sectors, such as ports & logistics and construction are suited to the development of low carbon activities.

THREATS

- Businesses working in the low carbon sector face strong competition from overseas businesses. There is significant expertise in northern Europe.
- Jobs in the low carbon sector tend to require high skill levels. Growth of this sector could be hindered by a skills gap.

Advanced manufacturing

3.18 This sector includes manufacture of chemicals, pharmaceuticals, computers and electricals, machinery, vehicles and trailers, transport equipment and machinery repair and installation.

CURRENT OVERVIEW

JOBS (2016)

Number	1,375
% of all jobs	3%
LQ vs GB	1.1
% Change (2011-16)	+22%

BUSINESSES (2017)

Number	115
% of all businesses	2%
LQ vs GB	1.5
% Change (2012-17)	+21%

LOCAL SPECIALISMS

Manufacture of Electricity Distribution and Control Apparatus
225 jobs; LQ = 11.0

Manufacture of General Purpose Machinery
180 jobs; LQ = 5.6

Repair of Machinery
170 jobs; LQ = 3.2

KEY LOCATIONS

Location	Jobs (2016)	LQ vs. England
Brightlingsea	80	1.1
Clacton-on-Sea	250	0.8
Frinton-on-Sea and Walton-on-the-Naze	25	0.3
Harwich and Dovercourt	170	0.8
Jaywick	0	0
Manningtree, Mistley and Lawford	80	1.4

KEY ASSETS

- The University of Essex is building a state-of-the-art STEM skills centre in Colchester. It will include an innovation centre, which will accommodate 50 high tech start-ups.
- A number of high-profile companies engaged in advanced manufacturing activities are located in Tendring and Essex.
- Tendring is located next to advanced manufacturing hubs and is close to transport links including ports and airports.

OPPORTUNITIES

- This high value sector has a strong presence in other parts of the Haven Gateway, requiring supply chains.
- Demographic change will create new manufacturing demand, particularly in health and pharmaceutical related manufacturing.
- Given its proximity to both Cambridge and London, Essex is well-located to access significant centres of technology innovation and funding.

THREATS

- Though it is only a subset of the manufacturing sector, the wider sector has declined significantly over recent decades and this trend is expected to continue.
- It is a high value sector and requires skilled workers. Brexit could lead to labour shortages in these types of sectors.
- In fact, Greater Essex companies already find it difficult to recruit enough people with technical and research expertise.

Business and Enterprise

Business Size

3.19 Tendring has a diverse business base with a mix of business sizes, activities and performances. There are around 5,200 businesses located in Tendring. This has grown by 11% since 2012, with a large part of that growth occurring in recent years.

3.20 While lower than in comparator areas, a large proportion (84%) of Tendring's businesses employ fewer than ten people. While Tendring is also home to a higher proportion of small and medium sized businesses, large businesses with over 250 employees are less prevalent in Tendring. Tendring has 5 large businesses, which represent 0.1% of all businesses in Tendring.

Table 3.3 Size of Businesses, 2017

Business Size	Tendring		Essex	South East LEP	England
	No	%	%	%	%
Micro (0-9)	4,330	84%	86%	86%	85%
Small (10-49)	680	13%	12%	12%	12%
Medium (50-249)	140	3%	2%	2%	3%
Large (250+)	5	0.1%	0.3%	0.3%	0.4%
Total	**5,155**	**100%**	**100%**	**100%**	**100%**

Source: UK Business Count, 2017

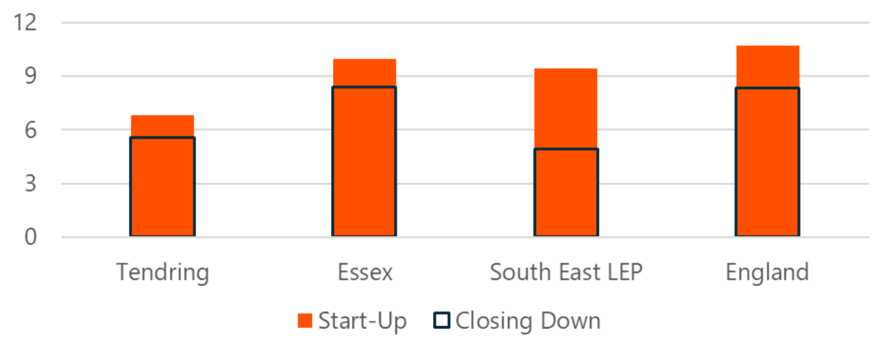
Business Start Up

3.21 Business demography data shows that there were fewer new businesses started (or business 'births') in Tendring in 2016 relative to the comparator areas (as seen in Figure 3.3). There were around 6.8 businesses started per 1,000 working-age residents in Tendring compared to around 10 in Essex.

3.22 Business closures (or 'deaths') were lower in Tendring compared to Essex and England, but higher compared to the South East LEP. However, given low business start rates, net birth rates were overall lower in Tendring relative to the comparator areas. This has remained relatively steady across Tendring and comparator areas since 2013, as seen in Figure 3.4.

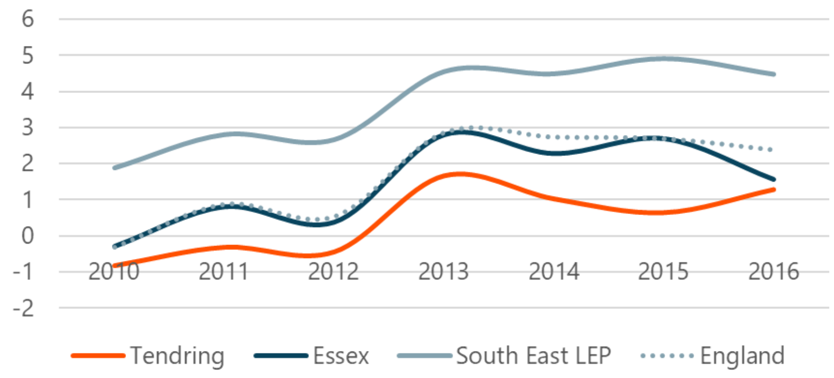
3.23 Data from Companies House shows that 630 new businesses started up in Tendring in 2017. Of all businesses active in 2017, 15% of them were formed in 2017.

Figure 3.3 Business Birth and Death Rate per 1,000 Working-Age Residents, 2016



Source: UK Business Demography, 2016

Figure 3.4 Business Net Birth Rate per 1,000 Working-Age Residents



Source: UK Business Demography, 2016

Enterprise & Business Survival

3.24 While Tendring has a relatively low business start-up rate, those businesses that do establish themselves in the district have relatively high survival rates compared to Essex, the South East LEP and England (see Table 3.4).

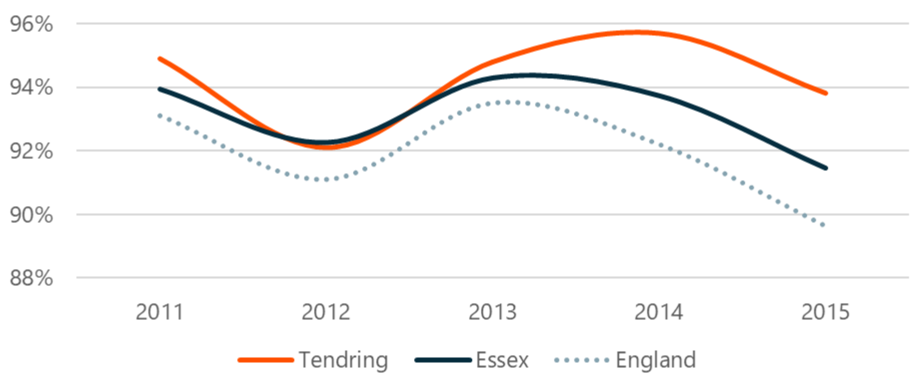
Table 3.4 Business Survival Rate, 2010 births

	1 Year	3 Years	5 Years
Tendring	95%	62%	45%
Essex	94%	62%	45%
South East LEP	94%	61%	44%
England	93%	60%	44%

Source: UK Business Demography, 2016

3.25 For new businesses started in 2015, one-year survival rates in Tendring are around 95%, which exceed those of the comparators. These rates have only fluctuated slightly over recent years (Figure 3.5).

Figure 3.5 Business One Year Survival Rate



Source: Business Demography, ONS, 2016

3.26 Self-employment and home-working levels can be used as an indicator for the entrepreneurial levels of the local population.

3.27 According to the latest Annual Population Survey data, there are approximately 9,000 people who are self-employed in Tendring, shown in Table 3.5 below. This represents 16% of the population, which is similar to the national average and the local comparators, Essex and the South East LEP.

3.28 There are around 6,000 people who work from home in Tendring. These people make up 15% of the population. This is slightly higher than the share in England of 13%.

Table 3.5 Self-Employment & Home-Working Levels

	% Self-Employed (2017)		% Home-working (2011)	
	No.	%	No.	%
Tendring	9,000	16%	6,000	15%
Essex	121,000	17%	-	-
South East LEP	353,000	17%	-	-
England	4,185,000	15%	2,632,000	13%

Source: Annual Population Survey, 2017; Census, 2011

Commercial Property Market Performance

3.29 The property market in Tendring is small and localised. It has low transaction volumes and units that are taken up are generally small. This is true for both the office and industrial markets. The district has high occupancy rates.

3.30 Table 3.6 shows that between 2008 and 2018, there has been an even split between office (52%) and industrial / warehouse (48%) deals. However, substantially more industrial / warehouse floorspace was traded compared to office floorspace, accounting for 75% of the total.

3.31 Recent years have seen an increase in deals and floorspace volumes transacted in both office and industrial markets, suggesting growing confidence.

Table 3.6 Number of Deals by Year – Tendring District

	Office		Industrial		Total	
	No. of Deals	Floorspace (Sqm)	No. of Deals	Floorspace (Sqm)	No. of Deals	Floorspace (Sqm)
2008	1	351	2	390	3	741
2009	3	284	6	12,862	9	13,146
2010	2	337	5	1,309	7	1,646
2011	4	432	4	2,059	8	2,491
2012	10	1,905	3	3,139	13	5,044
2013	9	2,565	8	2,929	17	5,494
2014	4	472	6	5,587	10	6,059
2015	10	1,624	7	2,689	17	4,313
2016	9	718	11	5,243	20	5,961
2017	14	2,429	12	4,198	26	6,627
2018 (YTD)	5	2,819	2	767	7	3,586
Total	**71**	**13,936**	**66**	**41,172**	**137**	**55,108**

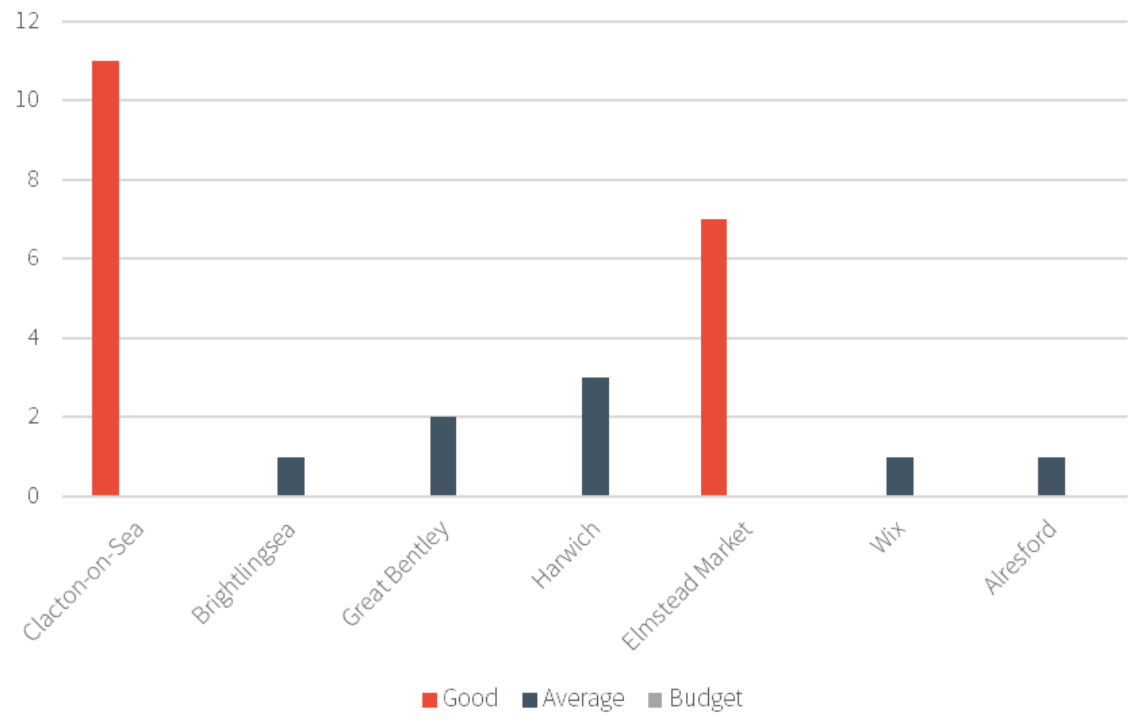
Source: EGi, 2018

3.32 Clacton-on-Sea remains the centre point of the office market with the largest number of deals and largest amount of floorspace transacted. Other important local office markets include Harwich, Ardleigh and Elmstead.

3.33 Based on available rental information between 2008 and 2018, the average office rent in the district is £96.45/sqm, and £55/sqm for industrial rent. Office occupancy rates are at around 90-95% which suggests Tendring has a vibrant and attractive market with capacity for growth but with limited choice in the market.

3.34 Figure 3.6 shows that 18 available properties (69 percent) were of a good quality, with a further eight (31 percent) being of average quality. No budget options can be found available at present. This rating was based upon a review of the marketing for the premises and the price points set for each unit. Clacton-on-Sea contains the highest number of available properties, with 100 percent of the properties on the market here available on a leasehold basis and considered to be of a good quality.

Figure 3.6 Quality of Marketed Office Property



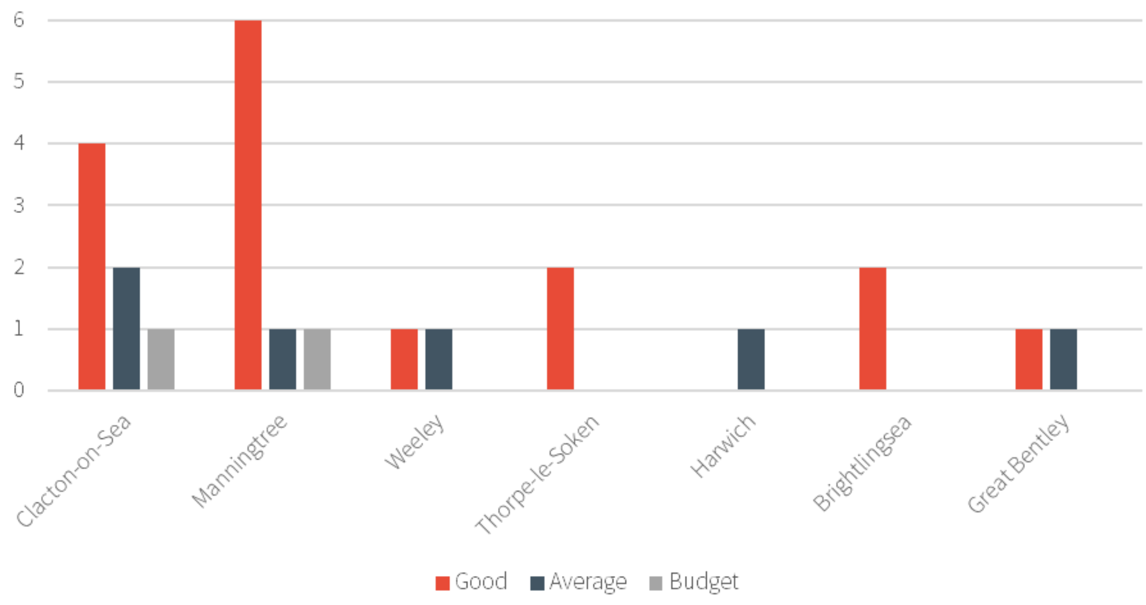
Source: BE Group, 2018

3.35 In terms of the industrial market, industrial transactions have been fairly consistent over the last decade but have increased in the last couple of years. Clacton remains the dominant focus of this market with Gorse Lane industrial estate seeing the largest levels of activity.

3.36 Longer term leases are being offered on good quality industrial stock which suggests that there is some confidence in the market. Again, occupancy levels are generally high and there is a shortage of readily available stock in the market.

3.37 Figure 3.7 shows that the majority of available space within Tendring is of a good quality with 16 units (66 percent) rated as good based on a review of the properties and price points. The majority of these are based in Manningtree and Clacton on Sea. A further six units (25 percent) are of an average quality and, unlike with office units within Tendring, there are budget offerings available. Two units (nine percent) are available at budget level, within Clacton-on-Sea and Manningtree. A full range of quality of marketed units is only seen in these two locations.

Figure 3.7 Quality of Marketed Industrial Property



Source: BE Group, 2018

3.38 Consultations with local commercial agents to inform the *Employment Land Review* indicate good demand for stock in Tendring (predominantly small units) but a lack of supply.

3.39 The findings suggest that while the market is small, it is a strong market with high occupancy levels and above average transaction volumes in the most recent years. The low vacancy levels suggest that the momentum of these transaction volumes may struggle to be maintained without further stock being brought to the market.

Tendring's Labour Market

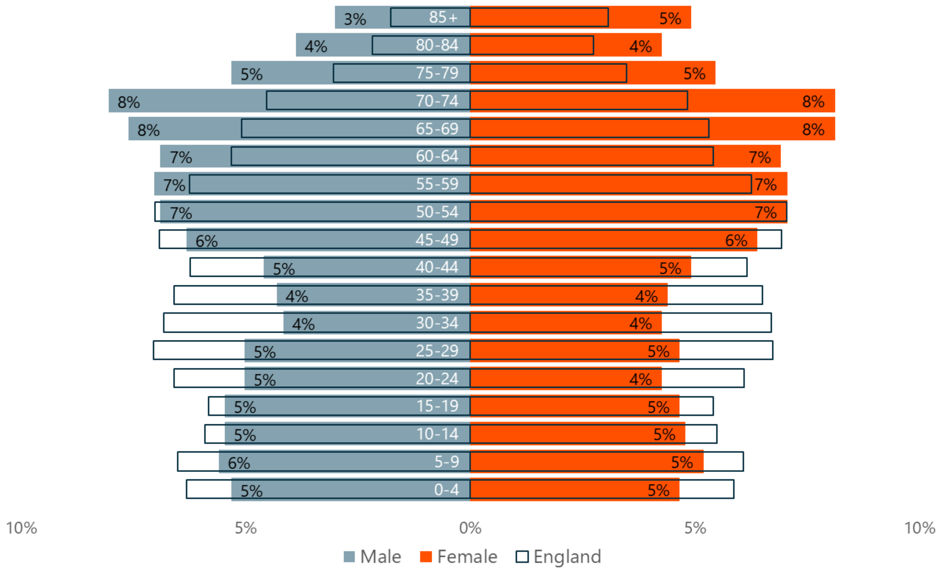
Population & Age Structure

3.40 Table 3.7 provides a breakdown of Tendring's population in key figures. As seen overleaf, Tendring has a resident population of almost 145,000, comprising around 10% of Essex's total population.

3.41 Tendring has a relatively small working-age population, with only 54% of residents aged between 16 and 64 compared with 63% nationally.

3.42 As seen in Figure 3.8, this is largely influenced by Tendring's high concentration of older people. 29% of Tendring's residents are aged 65 or more, while those aged between 65 and 74 are particularly common when compared to England.

Figure 3.8 Tendring Population Age Breakdown, 2017 Estimates



Source: Mid-Year Population Estimates, 2017

3.43 Conversely, Tendring has a low proportion of residents aged 15 or under compared to England. Younger people make up 16% of Tendring's population compared to 19% nationally.

3.44 This age structure indicates that Tendring has a relatively high dependency ratio, which could act as a constraint on the local economy.

Table 3.7 Population Breakdown, 2017 Estimates

Area	Total	Aged 0-15		Aged 16-64		Aged 65+	
	No	No	% of total	No	% of total	No	% of total
Tendring	144,600	23,600	16%	78,400	54%	42,600	29%
Essex	1.47m	275,100	19%	893,300	61%	299,700	20%
South East LEP	4.20m	800,300	19%	2.55m	61%	852,200	20%
England	55.62m	10.64m	19%	34.95m	63%	10.03m	18%

Source: Mid-Year Population Estimates, 2017

Population Growth

3.45 Figure 3.9 provides an indication of population age structures in Tendring and comparator areas over time.

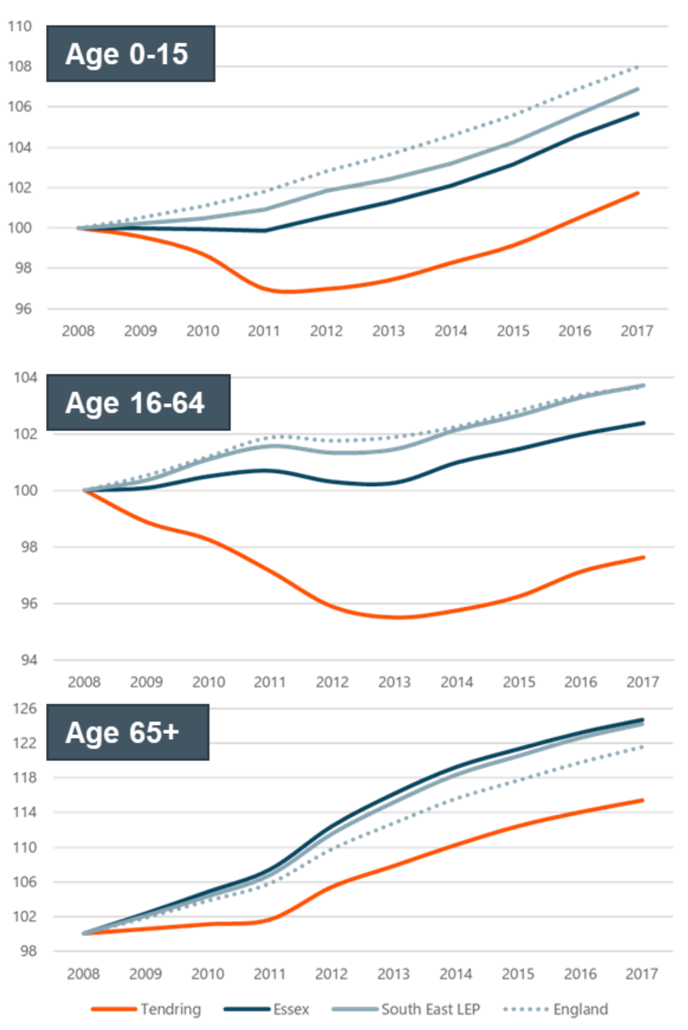
3.46 Tendring's working-age population has grown slightly since 2013 but is still below its 2008 level.

3.47 There is a similar story for its young population. There was a sharp drop until 2011, followed by a steady rise in residents aged 15 or less. However, the number of people aged under 16 has overtaken its 2008 level.

3.48 Unlike in Tendring, the number of people in these age groups has consistently risen over the period in the three comparators.

3.49 Over the past decade, the main driver of population growth in Tendring has been the over 65 age group. This age bracket has seen consistently positive growth, accelerating after 2011. At a growth rate of 14% (5,500 people) over the past decade, the 65+ population has grown at a faster rate in the comparator areas.

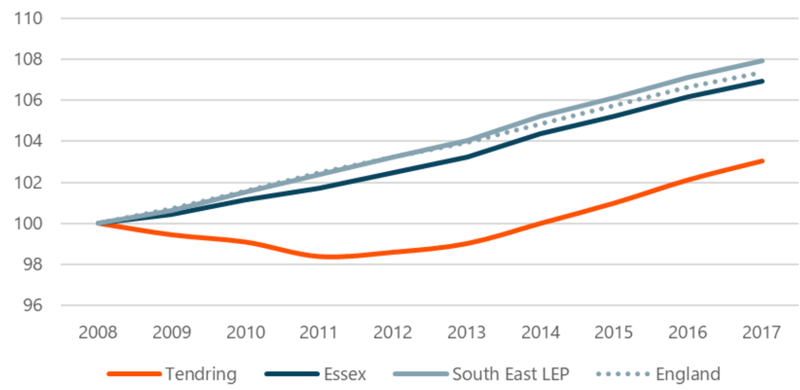
Figure 3.9 Population Growth by Age Group (Base Year = 2008)



Source: Mid-Year Population Estimates, 2008-17

3.50 Together, these findings indicate that population growth has been relatively weak in Tendring over the past decade, though there has been an upward trend in growth since 2013.

Figure 3.10 Population Growth (Base Year = 2008)



Source: Mid-Year Population Estimates, 2008-17

Population Forecasts

3.51 As seen in Table 3.8, the total population of Tendring is projected to grow by 10% to 157,500 by 2033. It is projected to grow at a relatively stable rate across the period.

3.52 The working age population is expected to grow by 8% over the period with most of the growth occurring by 2028. Given that population growth was relatively slow for this age group between 2008 and 2017, this represents an increase in the growth rate.

3.53 The Experian estimates suggest that, in 2017, 53% of residents were of working age population. This is low compared to Essex and England, where ONS data suggests the proportion is over 60%. The estimates suggest that the share of working-age residents is expected to fall slightly to 52% over the period to 2033.

Table 3.8 Experian Population Projections

Year	Working-Age Population		Total Population	
	No.	Growth since 2017	No.	Growth since 2017
2017	76,600	0%	143,200	0%
2023	79,500	4%	148,300	4%
2028	82,600	8%	152,900	7%
2033	82,400	8%	157,500	10%

Source: Experian Population Projections, 2017 (as used in the *Tendring Employment Land Review* 2019)

Labour Market Participation

3.54 As seen in Table 3.9, there were over 56,000 people living in Tendring in 2017 who were economically active. This was around three quarters of working age residents, which was slightly below the national average. However, the activity rate has risen faster in Tendring over the past five years relative to comparator areas.

3.55 71% of working age residents in Tendring are in employment. This is also lower than in the comparator areas, but again, Tendring is catching up.

3.56 Similarly, at 7% in 2017, Tendring has a relatively high unemployment rate. This is significantly higher than the rate in comparator areas but has shown signs of decline. While the female unemployment rate is similar to those of the comparators, Tendring has a relatively high male unemployment rate. This is the main driver of Tendring's high overall unemployment rate.

3.57 Youth unemployment is also higher in Tendring compared to comparators, with 14% of 18-24 year olds residents unemployed, compared to 8% nationally.

3.58 Tendring has a slightly higher rate of Job Seeker's Allowance claimants. However, the rate has almost halved since 2012, following national trends.

Table 3.9 Labour Market Participation (pp indicates percentage points)									
	Tendring			Essex		South East LEP		England	
	No.	%	Change Since 2012	%	Change Since 2012	%	Change Since 2012	%	Change Since 2012
Economic Activity Rate (16-64)	56,200	76%	+4pp	81%	+2pp	80%	+2pp	79%	+2pp
Employment Rate (16-64)	52,300	71%	+7pp	78%	+4pp	77%	+5pp	75%	+4pp
Unemploy. Rate (16-64)	3,900	7%	-4pp	4%	-3pp	4%	-4pp	5%	-4pp
% of 18-24 unemployed	1,600	14%	-8pp	8%	-6pp	7%	-7pp	8%	-6pp
Male Unemploy. Rate (16-64)	3,000	10%	-1pp	4%	-4pp	4%	-4pp	5%	-4pp
Female Unemploy. Rate (16-64)	900	4%	-7pp	4%	-3pp	4%	-4pp	4%	-3pp
Job Seeker's Allowance Claimants	1,600	2%	-2pp	1%	-4pp	1%	-2pp	1%	-3pp

Source: Annual Population Survey, 2012, 2017, Jobs Seeker's Allowance Data, 2012, 2018

Commuting Patterns

3.59 Table 3.10 summarises commuting patterns in Tendring in 2011. It shows a net outflow of commuters from Tendring, with around 17,000 residents commuting out and nearly 7,000 commuting in each day.

3.60 A more detailed breakdown shows that nearly 9,000 of these commuters travel to Colchester, while nearly 2,500 travel to London. Colchester is also the most common location from which in-commuters come from.

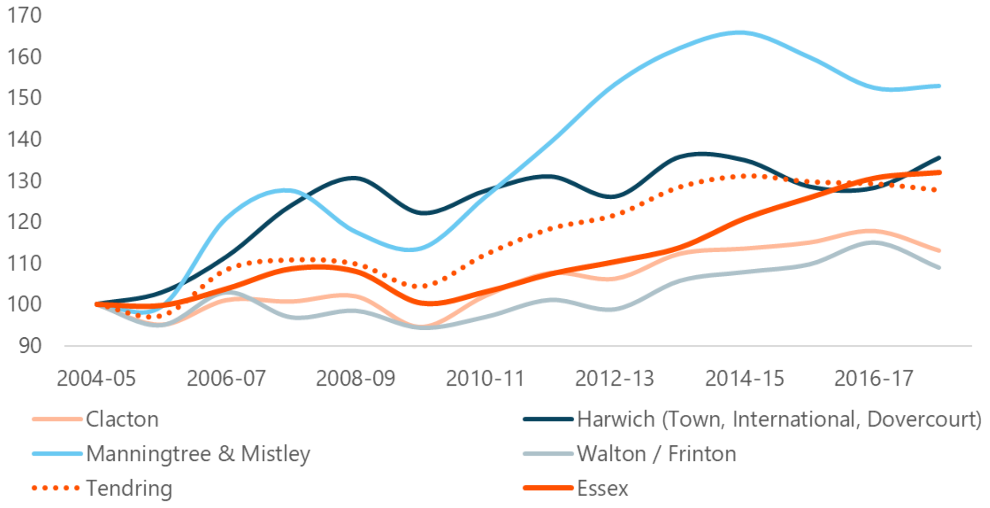
3.61 Around 26,000 people live and work in the district, which is around 60% of employed residents. There is a relatively high number of people who work from home in Tendring. Over 6,000 people use their home as a primary base for work.

Table 3.10 Commuting Patterns within Tendring, 2011	
Indicator	Tendring
Total living in Tendring (in employment)	43,400
Total working in Tendring	32,900
Commuting Patterns	
Out-commuters	17,300
In-commuters	6,800
Tendring's Workers & Residents	
Total living and working in Tendring	26,100
Home workers	6,400
No fixed workplace	5,400

Source: Census, 2011

3.62 More recent trends on commuting (especially to London) can in part be derived from trends in entries/exits to Tendring's railway stations, shown in Figure 3.11. There have been strong increases in the number of rail users in Manningtree & Mistley relative to the rest of the District, with a 40% increase between 2009 and 2015. By comparison Clacton and Walton & Frinton have both experienced declining numbers of rail passengers over the last year.

Figure 3.11 Rail Passenger Entries / Exits, 2017/18



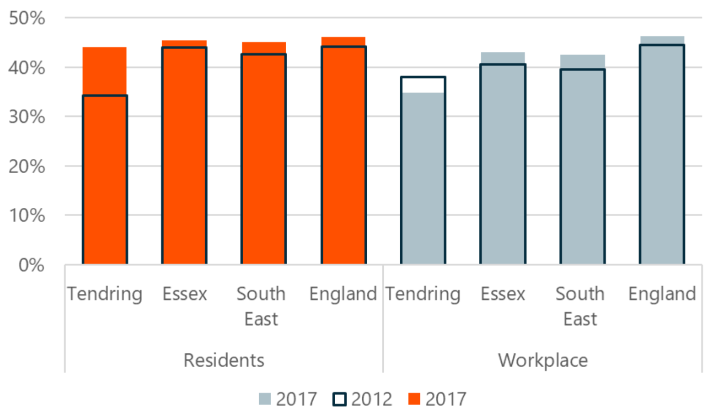
Source: Estimates of Station Usage, 2017/18

Note: Stations have been grouped together based on geographical area

Occupations

3.63 Occupational analysis shows variance between those who live in Tendring and those who work in Tendring. As seen in Figure 3.12, there is a higher proportion of Tendring residents in higher level occupations compared to those who work in Tendring.

Figure 3.12 Proportion of Residents & Workers in Higher Level Occupations



Source: Annual Population Survey, 2012, 2017

3.64 Table 3.11 provides a detailed breakdown of occupations. For those who live in Tendring, there has been a significant rise in higher level occupations since 2012, particularly driven by growth in managers, directors & senior officials. Higher level occupations are the most common type in Tendring.

3.65 The proportion of residents in these types of jobs has almost caught up with comparator areas. Tendring was lagging behind in 2012, but these job types have grown faster than in other areas.

3.66 On the other hand, there has been a reduction in the number of higher level jobs based in Tendring over the five year period. This has occurred while the proportion of these type of jobs has risen in the comparator areas.

3.67 However, it is worth noting that this information is based on surveys, with low confidence intervals at smaller geographies.

Table 3.11 Occupations of Tendring's Residents & Workers				
	Tendring's Residents		Tendring's Workers	
	Jobs (2017)	Change (2012-17)	Jobs (2017)	Change (2012-17)
Managers, Directors & Senior Officials	9,000	+114%	4,400	-10%
Professional	6,900	+33%	4,600	-26%
Associate Prof & Tech	8,100	-4%	3,000	-40%
Higher Level Occupations (total)	24,000	+35%	12,000	-25%
Administrative & Secretarial	5,700	-20%	4,000	+0%
Skilled Trades	6,700	-8%	4,400	-15%
Elementary	5,900	-13%	5,100	-2%
Caring, Leisure & Other Service	3,300	+18%	2,300	+5%
Sales & Customer Service	3,500	-19%	2,300	-43%
Process, Plant & Machine	5,500	+0%	4,400	-21%

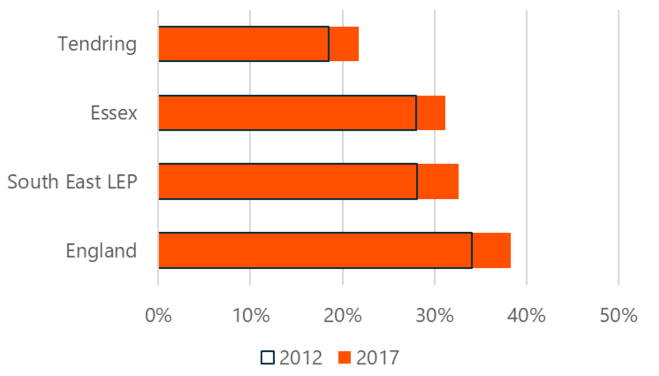
Source: Annual Population Survey, 2012, 2017

Qualifications

3.68 The Tendring population is characterised as having a relatively small proportion of residents with level 4 (degree level) qualifications, as seen in Figure 3.13. Only 22% are qualified to that level, compared with 38% nationally. It is also significantly lower than the rates in Essex (31%) and the South East LEP (33%).

3.69 The proportion of residents with degree level qualifications has risen slightly since 2012.

Figure 3.13 Proportion of Residents with Degree Level Qualifications



Source: Annual Population Survey, 2012, 2017

3.70 As seen in Table 3.12, there is a high proportion of residents in Tendring who are qualified up to level 1 or 2. However, there are similar rates to the national average in terms of residents with no qualifications or other qualifications.

Table 3.12 Occupations of Tendring's Residents & Workers					
	Tendring		Essex	South East LEP	England
	No	%			
No Qualifications	6,000	8%	7%	7%	8%
Level 1	13,800	19%	15%	14%	11%

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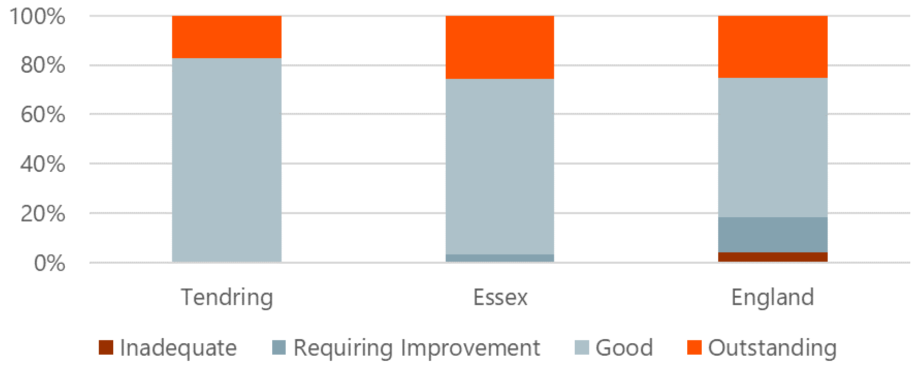
Level 2	17,600	24%	22%	20%	18%
Level 3	14,400	20%	19%	20%	19%
Level 4	15,900	22%	31%	33%	38%
Other	5,400	7%	6%	6%	7%

Source: Annual Population Survey, 2012, 2017

Education

3.71 Data on GCSE performance, summarised in Table 3.13, shows that performance in Tendring is worse than the Essex and national average. Only 54% of pupils attained A*-C in English and Maths GCSEs, compared to 64% in Essex and 63% in England. Tendring also performs worse in terms of its average attainment 8 score relative to Essex and England.

Figure 3.14 Ofsted School Rating (based on total pupils), 2017/18



Source: Ofsted, 2018

3.72 45% of 19-year olds in Tendring have achieved level 3 qualifications. This is relatively low compared to Essex and England, where the rates are 56% and 57% respectively.

3.73 Figure 3.14 shows Ofsted School Ratings across Tendring and comparator areas. There are no secondary schools in Tendring rated by Ofsted as requiring improvements or as inadequate. Of the 7,032 pupils in the District, 17% attend a school rated as outstanding, while the remaining 83% attend schools rated as good.

3.74 This compares favourably to Essex and England, where the proportion of pupils attending schools requiring improvement or rated as inadequate are 3% and 17% respectively. However, Tendring has a lower proportion of pupils attending outstanding schools, with 26% in Essex and 25% in England.

Table 3.13 Qualifications Achieved in Tendring

	Tendring	Essex	England
% of Pupils Attaining A*-C English and Maths GCSEs	54%	64%	63%
Average Attainment 8 Score	45.5	50.4	50.1
% of 19 Year Olds Attaining Level 3 Qualifications	45%	56%	57%

Source: Annual Population Survey, 2012, 2017

Social Inclusion

Resident Backgrounds

3.75 As seen in Table 3.14, Tendring is significantly less ethnically diverse than England, with 98% of residents being of white ethnic background according to the 2011 census.

Table 3.14 Ethnic Background, 2011

Ethnic Group	Tendring	England
White	98%	85%
Mixed/Multiple Ethnic Groups	1%	2%
Asian/Asian British	1%	8%
Black/African/Caribbean/Black British	0%	4%
Other Ethnic Group	0%	1%

Source: Census 2011

3.76 As seen in Table 3.15, Tendring also has a higher proportion of residents born in England compared to the national average. 94% of residents are born in England, while 2% come from the rest of the UK, 2% from the rest of the EU and 2% come from outside the EU.

3.77 The number of residents born in EU countries (members in 2001 only) fell in the decade leading up to 2011, while it rose nationally.

Table 3.15 Country of Birth, 2011

Country of Birth	Tendring		England	
	%	Growth Since 2001	%	Growth Since 2001
England	94%	-1%	84%	+3%
Rest of the UK	2%	-22%	3%	-12%
Other EU Members in 2001	1%	-9%	2%	29%
Other EU Members Joined after 2001	1%	-	2%	-
Other Countries	2%	+8%	9%	+46%

Source: Census, 2001, 2011

Earnings

3.78 As seen in Figure 3.15 Tendring's workers earn on average around £24,500 per year, while its residents earn around £27,600. This disparity between workplace and resident earnings reflects the difference in the type of occupations the two groups hold. A greater proportion of residents hold higher value jobs.

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Figure 3.15 Median Full-Time Gross Annual Earnings for Workers and Residents

Source: Annual Survey of Hours and Earnings, 2017

3.79 Table 3.16 provides a more detailed breakdown of salaries. Both the median salary of Tendring's workers and residents are lower than the respective salaries for the comparator areas of Essex, the South East LEP and England. Salaries are particularly high in Essex.

3.80 The difference in resident and workplace salaries of around £3,000 is relatively common across Tendring, Essex and the South East LEP.

Table 3.16 Median Full-Time Gross Annual Earnings for Workers and Residents

	Residents		Workers	
	Median Earnings (2016)	Change (2012-17)	Median Earnings (2016)	Change (2012-17)
Tendring	£27,600	+9%	£24,500	+10%
Essex	£31,800	+8%	£28,700	+8%
South East LEP	£30,500	-	£27,600	-
England	£29,100	+8%	£29,100	+8%

Source: Annual Survey of Hours and Earnings, 2017

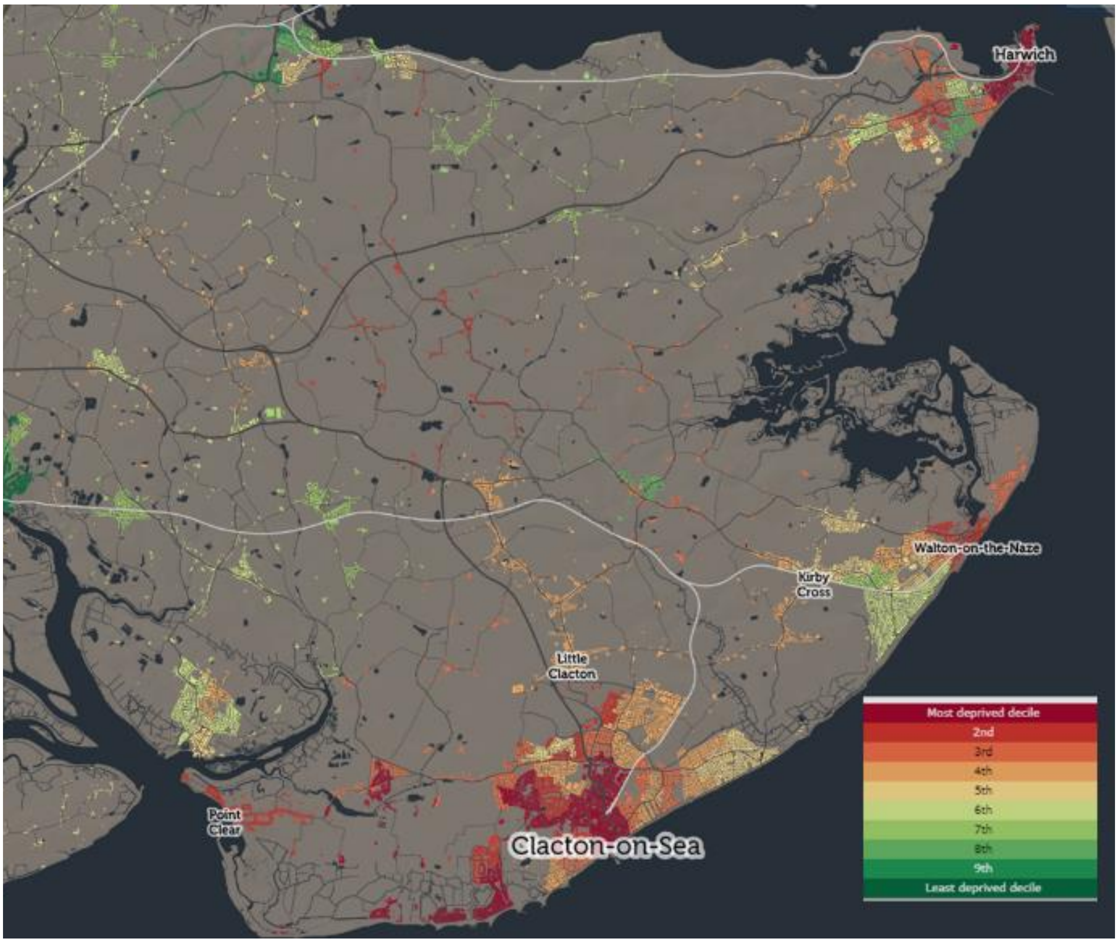
Deprivation

3.81 Data from the Index of Multiple Deprivation (produced by DCLG in 2015) shows that there are significant areas of Tendring with severe deprivation (see Figure 3.16). There are a number of lower super output areas (LSOAs) which are in the most deprived 10% of LSOAS.

3.82 These deprived areas are particularly found in the south of the district. However, there are others in the centre and towards the east of the district. In total, 28% of Tendring's LSOAs are in the most deprived 20% of LSOAs nationally.

3.83 There are some areas with low deprivation levels, particularly towards the north west of the district. While no LSOAs appear in the least deprived 10% of LSOAs, two are in the least deprived 20%.

Figure 3.16 Index of Multiple Deprivation – Overall, 2019



Source: Index of Multiple Deprivation, CRDC, 2019

3.84 In terms of the domains of deprivation, Tendring performs poorly in terms of both employment deprivation, and education, skills and training deprivation.

3.85 Tendring performs well in terms of a lack of living environment deprivation and barriers to housing and services deprivation.

Health

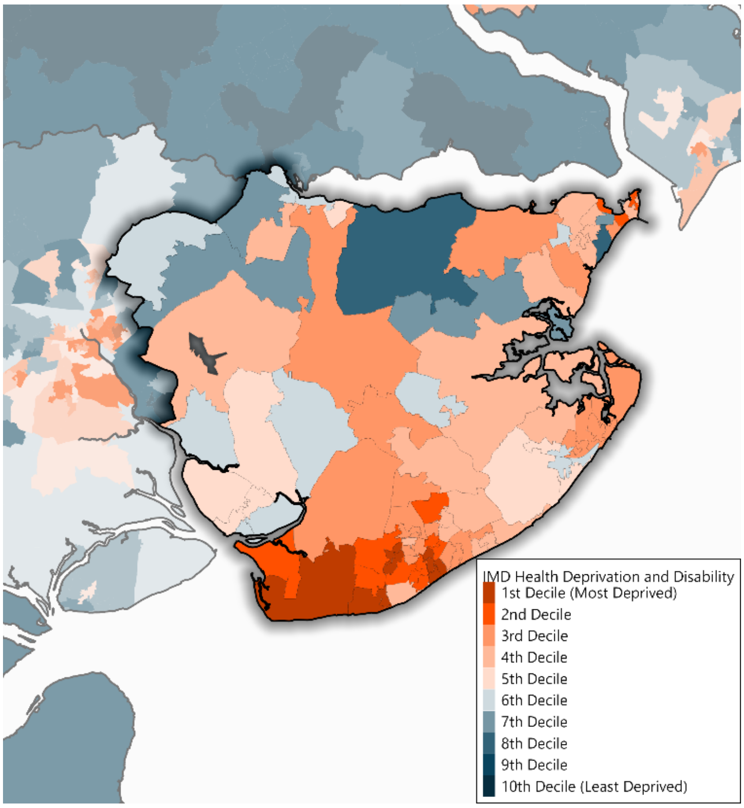
3.86 Public Health England have produced a summary document on the health situation in Tendring.

3.87 It notes that health in the local authority is generally worse than the England average. Tendring is one of the 20% most deprived districts in England.

3.88 The report provides a snapshot of poor child health. In year 6, 20% of children are classified as obese, while levels of GCSE attainment, breastfeeding initiation and smoking at time of delivery are all worse than the England average.

3.89 Findings are similar for adult health, with high levels of alcohol-related hospital stays, high levels of adult excess weight and high rates of violent crime.

Figure 3.17 Index of Multiple Deprivation – Health Deprivation and Disability, 2015



Source: Index of Multiple Deprivation, DCLG, 2015

3.90 Life expectancy in the area is lower than the England average. Between the most deprived and least deprived area in Tendring, there is a 10.7-year life expectancy gap for males and 6.5 years for females.

3.91 Data from the Index of Multiple Deprivation (depicted in Figure 3.17) shows that there is significant health deprivation in the south west of the district. In total there are 21 LSOAs (23% of total) in Tendring that fall in the 20% most deprived LSOAs in England.

Housing

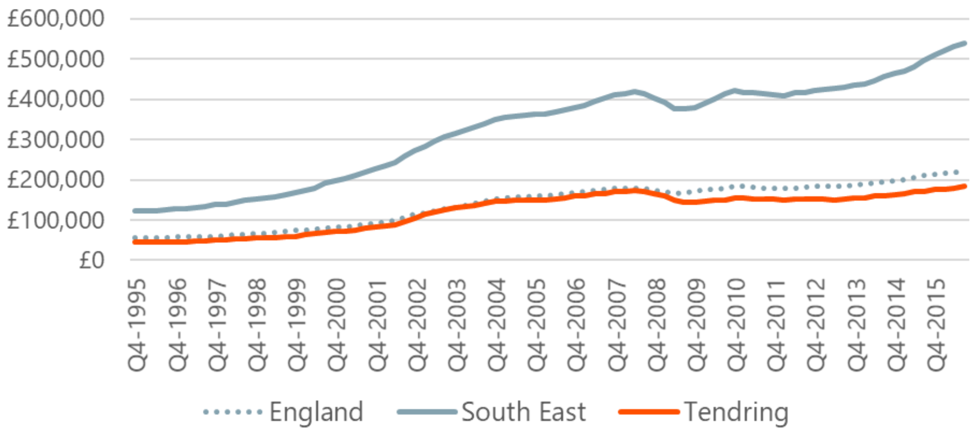
Housing Affordability

3.92 Over the past twenty years, house prices in Tendring have tended to be similar to those in England overall, but much lower than in the South East. This can be seen in Figure 3.18.

3.93 In recent years, house prices have increased significantly in the South East, but they have remained relatively stable in Tendring. In fact, house price growth since 2008 in England has outstripped that in Tendring.

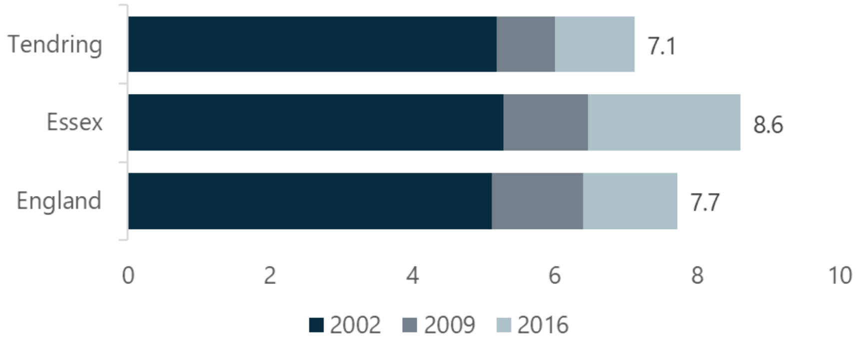
3.94 Tendring's housing affordability ratio is relatively low compared to Essex and England, as seen in Figure 3.19. The median house price is around seven times the average salary in Tendring. The housing affordability ratio has grown at a slower pace in Tendring compared to Essex and England since 2009.

Figure 3.18 Average House Prices, 2009-16



Source: ONS House Price Statistics for Small Areas, 2016

Figure 3.19 Housing Affordability Ratios, 2002, 2009, 2016



Source: ONS House Price Statistics for Small Areas, 2016, Annual Survey of Hours and Earnings, 2016

Note: Housing affordability ratios are calculated as the median house price divided by the median annual income.

Housing Requirement

3.95 The Tendring Local Plan sets out the ambitions of the North Essex Authorities (Tendring, Colchester and Braintree) to deliver housing growth across the area. This has been submitted to the Inspector.

3.96 It is expected that Tendring will aim towards delivering 550 new houses per annum (based on the Objectively Assessed Need for Housing), which equates to 11,000 new homes over the plan period (2013-2033). These figures are based on demographic projections for the area, although these calculations are complicated by uncertainty arising from unattributed population change.

3.97 The Tendring Planning Authority Monitoring Report 2015/16 examines how the area has performed against its housing targets. The results of this audit are summarised in Table 3.17.

3.98 Tendring did not meet its annual target for new homes in any of the years between 2013/14 and 2015/2016. In fact, 934 fewer homes were delivered than required over the three years. This means that there needs to be a further 10,300 completions between 2016 and 2033. A significant improvement was made in the delivery of homes in 2016/17, but a large shortfall still remained across the four years.

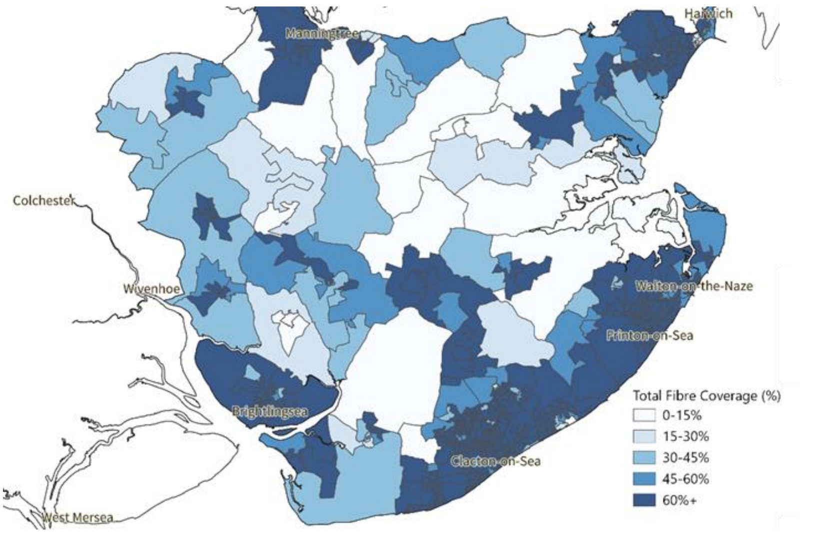
Table 3.17 Housing Plan Requirements in Tendring	
Annual Net Dwellings Required - Reported Years from Base Date	
Plan Period 2013-2033	11,000
Net Completions - Reported Years from Base Date	
2013/14	204
2014/15	267
2015/16	245
2016/17	658
Total	1,374
Shortfall – Reported Years from Base Date	
Total	826
Net dwellings from Base Date still required	
Total	9,626

Source: Tendring District Local Plan – Final Publication Draft (2017)

Digital, Transport and Energy Infrastructure

Digital Infrastructure

Figure 3.20 Total Fibre Coverage by Output Area, 2018



Source: Ofcom, 2018

3.99 Tendring has relatively poor fibre broadband coverage, with only 88.5% of premises having capacity for download speeds of over 30 Mbps. This is compared to 93.2% nationally.

3.100 While total fibre coverage is only slightly below the national average, Tendring falls down significantly in terms of capacity for ultrafast broadband.

3.101 Only 0.1% of premises in Tendring have capacity for download speeds of over 300 Mbps. This is significantly below the national average of 44.1%. This could partly be due to Tendring's rural location. However, it is also significantly lower than similarly rural areas such as West Sussex.

3.102 As seen in in Figure 3.20, there are also significant imbalances within the district, with much of central Tendring having poor capacity for superfast broadband. On the other hand, there is strong capacity for superfast broadband in coastal areas.

3.103 In fact, only four output areas in Tendring have any capacity for ultrafast broadband. Three of these are located close to Manningtree, while the other is near Brightlingsea.

Table 3.18 Digital Infrastructure Statistics					
Area	Tendring	West Sussex	Essex	South East LEP	England
Superfast Broadband Capacity	88.4%	66.2%	60.6%	58.9%	49.1%
Ultrafast Broadband Capacity	0.1%	27.8%	27.6%	32.7%	44.1%
Total Fibre Coverage	88.5%	94.0%	88.2%	91.6%	93.2%
Full Fibre to the Premises	0.1%	2.8%	1.7%	2.0%	4.1%

Source: Ofcom, 2018

Note: Superfast broadband defined as download speeds ≥ 30 Mbps and < 300 Mbps; ultrafast broadband defined as download speeds ≥ 300 Mbps; total fibre coverage defined as superfast coverage plus ultrafast coverage; and full fibre to the premises is where there is seamless fibre optic connection to a building/property.

Transport Infrastructure

3.104 A number of documents set out the key issues for Tendring in relation to transport infrastructure as follows:

- The **Tendring Infrastructure Delivery Plan (2017)** explains that there is a strong movement of people from Tendring into Colchester by road, while there is also a significant set of rail commuters to London.
- The **Infrastructure Delivery Plan** states that some parts of Tendring's road network are over capacity in the morning and evening peaks and could become an issue if there are further increases in housing and employment in the area.
- The **South East LEP Strategic Economic Plan** identifies a growth corridor along the A120 from Bishop Stortford and Stansted Airport in the west to Harwich in the east. It suggests that the corridor's growth potential is limited by capacity on the A120.
    - The SEP suggests interventions, such as dualling key sections of the road, to improve road infrastructure and to unlock further growth along the corridor.
    - The LEP argues that as a result of their suggested improvements, the corridor will be able to support 4,785 jobs and 2,953 new homes by 2021 and a further 24,100 jobs and 28,500 homes through the proposed transport schemes.
    - The A133 is another strategic road linking Clacton-on-Sea to Colchester. According to the previous economic development strategy, the route can get congested at peak summer weekends.

Energy Infrastructure

3.105 The 2017 *Tendring Infrastructure Delivery Plan* discusses current energy infrastructure in Tendring and potential future need. The report notes that there are no areas of Tendring District that will require additional gas infrastructure to accommodate the levels of growth proposed by the National Grid.

3.106 There are two Electricity Grid substations, one at Lawford and one at Clacton, which supply several other substations to meet local requirements. The report notes that there could be a need for significant new infrastructure in the future in the East Colchester Garden Community. However, this would not be required in the immediate future.

3.107 To accommodate further development in the Weeley area, it is envisaged that the Clacton Electricity Grid substation will need to be extended. The report notes that the Grid substation at Clacton is due to be reinforced in the coming years.

3.108 While no other residential sites in the area are expected to create any issues, any additional larger sites (50 dwellings or more) would require a new secondary substation on site.

4. Tendring Sub-Area Profiles

Implications for the Strategy

- Performance across Tendring's six centres has been varied, with some performing well since 2013, while others have deteriorated.
- The strongest economic performance in Tendring has occurred around Harwich & Dovercourt, Frinton-on-Sea & Walton-on-the-Naze, and Brightlingsea, with all areas experiencing strong employment and business growth.
- Tendring's largest economic centre, Clacton-on-Sea, has experienced a worrying economic decline over the last five years, with the number of jobs in the town centre falling by 7%. The town still maintains many of the structural challenges which were identified in 2013, including low attainment, few people employed in high-value occupations and high unemployment. The Economic Strategy should look to prioritise the rejuvenation of Clacton-on-Sea, to ensure it becomes a thriving and viable economic centre for Tendring.
- Other areas of Tendring have also experienced economic decline since the publication of the 2013 Economic Strategy, including Jaywick, and Manningtree, Mistley & Lawford. It will be important to ensure that these areas are not left behind in developing Tendring's refreshed *Economic Strategy.*

4.1 This section reviews data for six centres within Tendring. These locations are assessed on their performance in terms of jobs and business, the labour market, key sectors and deprivation.

4.2 The centres discussed are:

- Brightlingsea
- Clacton-on-Sea
- Frinton-on-Sea and Walton-on-the-Naze
- Harwich and Dovercourt
- Jaywick
- Manningtree, Mistley and Lawford

4.3 The evidence (as shown in Table 4.1) suggests that Tendring's six centres have had a mixed economic performance in recent years, with some experiencing strong growth over the past five years, whereas others have experienced economic decline.

4.4 Tendring's largest town centre is Clacton, which has a total of 14,500 jobs and 1,100 active businesses. It has experienced a decline in the number of jobs in recent years, falling by 7% over the last five years. The town has relatively low levels of people engaged in higher-value occupations, accounting for a quarter of all jobs in the town (the lowest level experienced across Tendring's towns outside of Jaywick).

4.5 The next largest clustering of employment is around Harwich and Dovercourt, with 6,000 people employed in this area in 420 active businesses. Compared to Clacton, Harwich and Dovercourt has a more positive economic story, with strong employment growth in recent years (+20%).

4.6 Amongst Tendring's other sub-areas, there has been a mix of economic trajectories over the last five years, with economic growth in Brightlingsea and Frinton-on-Sea & Walton-on-the-Naze, and economic decline in Jaywick and Manningtree, Mistley & Lawford. Three of these sub-areas (Brightlingsea, Frinton-on-Sea & Walton-on-the-Naze and Manningtree, Mistley & Lawford) have a relatively high proportion of people in higher value occupations, suggesting there are some high-value activities taking place in these areas.

Table 4.1 Tendring's Sub-Areas

Centre	Employ.	Employ. Growth 2011-16	Active Businesses, 2017	New Start-Ups in 2017	% in high-value occupations
Clacton	14,500	-7%	1,100	203	25%
Harwich & Dovercourt	6,000	+20%	420	76	27%
Brightlingsea	2,125	+13%	220	37	35%
Frinton-on-Sea & Walton-on-the-Naze	3,000	+20%	500	56	36%
Jaywick	325	-13%	34	9	21%
Manningtree, Mistley & Lawford	1,750	-8%	170	24	40%

Source: BRES, 2016, UK Business Count, 2017, Annual Population Survey, 2017

Brightlingsea

Jobs & Businesses

2,125 jobs in 2016
13% (250 jobs) rise since 2011

220 active businesses in 2017
37 new start-ups in 2017

Key Sectors in Brightlingsea

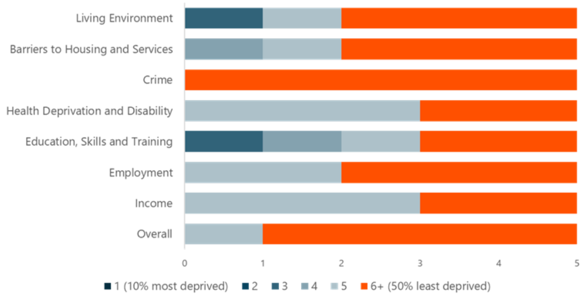
Sector	Jobs	Jobs Change since 2011	Location Quotient
Education	375	-6%	1.9
Construction	190	-14%	1.8
Utilities & Waste	90	+80%	3.9

Labour Market

	Brightlingsea	National
Total Population	8,000	-
% working aged population	56%	
% with degree level qualifications	20%	27%
% in high-value occupations	35%	41%
No. of claimants (June 2018)	50	-
% of claimants of working-age population	1%	2%

Deprivation

Number of LSOAs in each decile (5 in Brightlingsea)



Clacton-on-Sea

Jobs & Businesses

14,500 jobs in 2016
7% (1,000 jobs) **fall** since 2011

1,100 active businesses in 2017
203 new start-ups in 2017

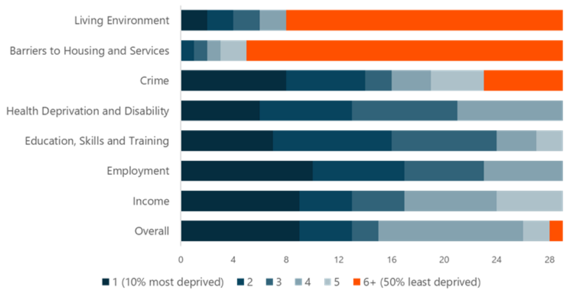
Key Sectors in Clacton-on-Sea

Sector	Jobs	Jobs Change since 2011	Location Quotient
Health & Care	2,750	0%	1.5
Retail	3,000	-8%	1.9
Utilities & Waste	220	+22%	1.5

Labour Market

	Clacton-on-Sea	National
Total Population	47,000	-
% working aged population	53%	
% with degree level qualifications	11%	27%
% in high-value occupations	25%	41%
No. of claimants (June 2018)	1,020	-
% of claimants of working-age population	4%	2%

Deprivation



Frinton-on-Sea and Walton-on-the-Naze

Jobs & Businesses

3,000 jobs in 2016
20% (500 jobs) **rise** since 2011

500 active businesses in 2017
56 new start-ups in 2017

Key Sectors

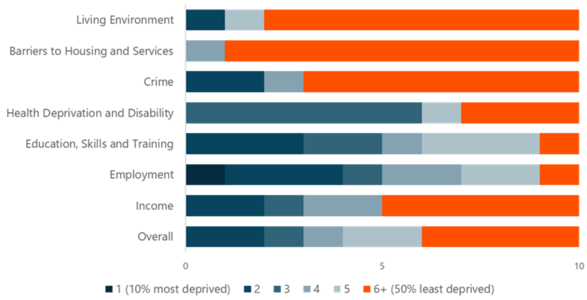
Sector	Jobs	Jobs Change since 2011	Location Quotient
Health & Care	600	+9%	1.7
Retail	550	+22%	1.7
Tourism	550	+47%	2.1

Labour Market

	Frinton-on-Sea and Walton-on-the-Naze	National
Total Population	14,000	-
% working aged population	46%	
% with degree level qualifications	19%	27%
% in high-value occupations	36%	41%
No. of claimants (June 2018)	105	-
% of claimants of working-age population	2%	2%

Deprivation

Number of LSOAs in each decile *(10 in Frinton-on-Sea and Walton-on-the-Naze)*



Harwich and Dovercourt

Jobs & Businesses

6,000 jobs in 2016
20% (1,000 jobs) **rise** since 2011

420 active businesses in 2017
76 new start-ups in 2017

Key Sectors in Harwich & Dovercourt

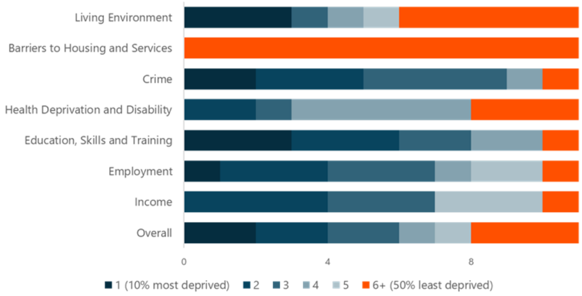
Sector	Jobs	Jobs Change since 2011	Location Quotient
Tourism	1,250	+113%	2.0
Transport	950	-16%	4.4
Ports & Logistics	1,000	0	4.0

Labour Market

	Harwich and Dovercourt	National
Total Population	19,000	-
% working aged population	57%	
% with degree level qualifications	14%	27%
% in high-value occupations	27%	41%
No. of claimants (June 2018)	390	-
% of claimants of working-age population	4%	2%

Deprivation

Number of LSOAs in each decile *(11 in Harwich & Dovercourt)*



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Jaywick

Jobs & Businesses

325 jobs in 2016
13% (50 jobs) **fall** since 2011

34 active businesses in 2017
9 new start-ups in 2017

Key Sectors in Jaywick

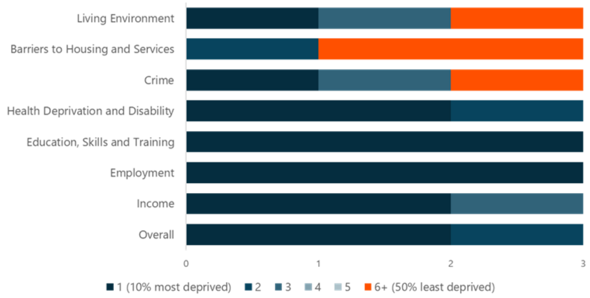
Sector	Jobs	Jobs Change since 2011	Location Quotient
Health & Care	130	+30%	3.5
Tourism	80	-20%	2.9
Retail	70	-13%	2.1

Labour Market

	Jaywick	National
Total Population	5,200	-
% working aged population	51%	
% with degree level qualifications	7%	27%
% in high-value occupations	21%	41%
No. of claimants (June 2018)	200	-
% of claimants of working-age population	7%	2%

Deprivation

***Number of LSOAs in each decile** (3 in Jaywick)*



Manningtree, Mistley and Lawford

Jobs & Businesses

1,750 jobs in 2016
8% (125 jobs) **fall** since 2011

170 active businesses in 2017
24 new start-ups in 2017

Key Sectors

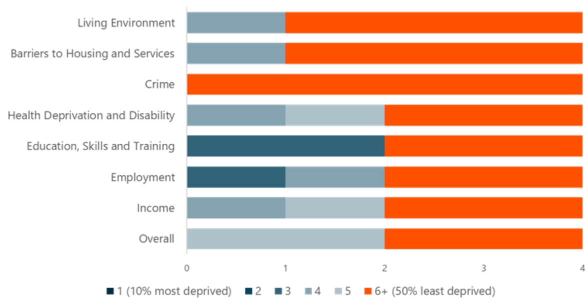
Sector	Jobs	Jobs Change since 2011	Location Quotient
Construction	300	+76%	3.6
Tourism	275	+86%	1.6
Manufacturing	230	-29%	1.6

Labour Market

	M, M & L	National
Total Population	5,800	-
% working aged population	61%	
% with degree level qualifications	26%	27%
% in high-value occupations	40%	41%
No. of claimants (June 2018)	40	-
% of claimants of working-age population	1%	2%

Deprivation

***Number of LSOAs in each decile** (4 in Manningtree, Mistley and Lawford)*



www.hatchregeneris.com
London: +44(0)207 336 6188 Manchester: +44(0)161 234 9910