CBI

South East

Reviving Regions:
Empowering places to revive and thrive

- South East growth priorities
- Regional scorecard identifying strengths
- 21 sub-regional scorecards

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Introduction

The UK has a productivity challenge. Productivity growth has stagnated since the financial crisis, with the knock-on impact of low wage growth and growing inequalities, which the CBI explored in **Reviving regions**, and have now expanded upon by publishing regional-specific scorecards and growth priorities.

Disparities between economic performance are large both across and within English regions. London remains the most productive part of the country in absolute terms, and many marginalised places are in the North of England. But the picture is not as clear cut as north vs. south, with most regions having areas that are doing well, and some that are underperforming.

The CBI has set out a series of recommendations to close productivity gaps and level up the country. The recommendations are underpinned by the idea that interventions must reflect local needs, and regions should be further empowered if we are to level up the country. This becomes increasingly important given the impacts of the pandemic could affect regions differently.

Click here to download the report

The report recommendations included:

- **Building vibrant local labour markets:** including increasing local capacity to deliver back to work programmes alongside a long-term focus on the devolution of adult skills to meet our growing skills gap.
- **Transforming local physical and digital infrastructure to facilitate new ways of working:** including a focus on the future of towns and cities, and a reform of regional funding to ensure a strategic approach to future investments.
- **Inspiring world-class, innovative businesses to invest in the regions:** including short term interventions to help businesses grow, locally designed and delivered business support with a focus on access to exporting opportunities, and interventions to close the gap in regional R&D funding.

The CBI has now developed a series of scorecards to support policymakers and business to understand the unique strengths of regions, and areas of focus for interventions. These provide a snapshot of the economic and social health of the nine regions of England, alongside a more detailed picture for sub-regions.

Based on this data, the recommendations set out above, as well as insights from local businesses the CBI has also developed growth priorities for each region, setting out what we hope to achieve working collaboratively with local and national stakeholders.

South East growth priorities

Context

The South East is ranked second out of nine English regions for productivity (GVA £ per hour). The region has high remote working potential, higher than average qualification levels and is an attractive destination for inward investment with links to London and an established innovation ecosystem. The South East has excellent connectivity and provides multiple access points to global markets. Recently government announced the Solent Freeport bid was successful, with the potential to create 26,000 jobs in the Solent and a further 26,000 in the wider UK supply chain. This Freeport will build on the status of the area as a global gateway for trade.

Competitive strengths

Advanced manufacturing

Professional and financial services

Health and life sciences

Leisure and tourism/Global gateway

Maritime industries

Regional assets

- Heathrow and Gatwick international airports
- Satellite Applications Catapult
- Growing Kent & Medway
- Southampton Marine and Maritime Institute
- 6G Innovation Centre

The CBI has developed the following growth priorities

- **Build vibrant local labour markets** by addressing low social mobility in the South East, the opportunities for lower income children to enter higher education are particularly challenged. A particular area of concern for business is the skills gap, lack of progression and transferable skills within the local workforce. This can be addressed through improved labour market information linked to careers guidance at all levels building upon Local Enterprise Partnership (LEP) engagement with the Careers and Enterprise Company.
- **Transform local infrastructure to facilitate new ways of working** by improving digital infrastructure. Due to the increase of hybrid working and learning it is more important than ever that digital connectivity capacity is reliable and consistent across both rural and urban areas. Improving the reliability, sustainability and capacity of physical infrastructure is a priority.
- **Inspire world-class innovative businesses to invest in the South East** by improving the innovation and R&D ecosystem by increasing the collaboration between business of all sizes, educational institutions and entrepreneurs. There is a need for targeted business support to facilitate growth and decarbonisation through bodies such as LEPs and local authorities. Catalyst South, a strategic partnership of six LEPs, should continue to develop the regional profile to help facilitate the creation of new opportunities for business investment.

Next steps

The CBI, working alongside local and national leaders, is focused on the implementation of these priorities. To become involved, please contact **Helena Coe**.

About the scorecards

The scorecards below provide a snapshot of the economic health of regions. Each scorecard includes 20 indicators, focussed on a region's productivity and some of the factors that can influence it. The scorecards are designed to help businesses, central and local government identify priority areas for intervention to improve local economic outcomes.

Regions and sub-regions

Because there are differences within regions, as well as between them, we have developed two different types of scorecards – one for each of the nine large English regions (known as ITL1 regions), and one for each of 133 sub-regions (known as ITL3 regions).

This pack contains a scorecard for the South East ITL1 region, followed by scorecards showing values for each of the 21 ITL3 sub-regions within it.

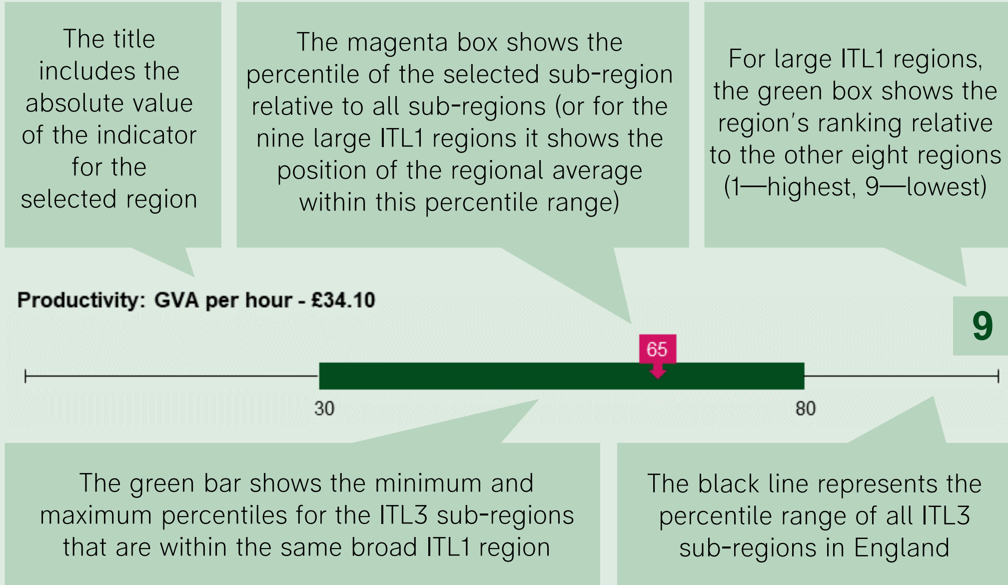
How to read the charts

All data in the charts are expressed as percentiles, which show how the value of an indicator for the selected area compares with the values of all English sub-regions. Taking productivity as an example, if a sub-region's productivity is at the 65th percentile, this means it is more productive than 65% of sub-regions.

The charts in the first scorecard show the range of outcomes within the South East ITL1 region (the dark green bar), plotting the position of the average for the region within this range (the magenta box).

Rankings are also provided showing how the averages for the South East ITL1 region compare with the averages of other large English regions.

The ITL1 scorecard is followed by scorecards showing values for each ITL3 sub-region within it, with the figure in the magenta box representing the percentile for the selected sub-region.



Is productivity converging or diverging?

To capture how productivity has changed over the decade to 2018 (latest available data), the scorecards assign each region to one of four groups:

- Above average productivity and above average productivity growth. Regions have pulled further ahead, increasing their advantage.
- Above average productivity but below average productivity growth. Regions are still doing well but have lost ground relative to the average.
- Below average productivity but above average productivity growth. Regions have narrowed the gap to the average, but some still lag behind.
- Below average productivity and below average productivity growth. Regions are falling further behind the average.

South East

Economic & social outcomes[1, 2]

Household income: £24,318 p/c — 2
79
15 95

Employment rate: 78.9% — 1
77
20 98

Deprivation index: 15.5 — 9
19
0 76

Life satisfaction index: 7.7 — 4
59
0 92

Scorecard key

x	Rank out of 9 regions, 1=highest value
	Percentile of average for ITL1 region[3]
	Range of ITL3 sub-regions within ITL1 region[3]
	Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £37.79 — 2
83
4 96

- Above average and gaining ground
- Above average but losing ground
- Below average but gaining ground
- Below average and losing ground

Vibrant local labour markets

Schools above standard: 89.6% — 4
56
3 88

Graduates in workforce: 43.4% — 2
72
27 92

In-work training: 18.8% — 5
38
5 83

Working-age population & projected change by 2030
5,621,495
1.7%

Well-connected, accessible places

Broadband speed: 54.2 mb/s — 7
43
4 94

Commute time: 31.8 mins — 2
69
1 93

Home working index: 3.4 — 2
74
5 93

Median house prices: £327,500 — 2
75
42 86

World-class, innovative businesses[3]

R&D per head (ILT2): £771 — 2
83
42 95

Innovation activity (ITL1): 40.2% — 2
76

High growth firms: 4.6% — 2
70
4 100

Exports intensity: 28.6% of GVA — 4
73
6 96

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data is for ITL2 level regions. For innovation activity all data is for ITL1 regions only.

Berkshire

South East

Classification: Predominantly Urban

Economic & social outcomes[1, 2]

Household income: £25,067 p/c

82 — 15 – 95

Employment rate: 79.6%

83 — 20 – 98

Deprivation index: 12.8

11 — 0 – 76

Life satisfaction index: 7.7

58 — 0 – 92

Scorecard key

- Percentile of ITL3 sub-region[3]
- Range of ITL3 sub-regions within ITL1 region[3]
- Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £47.25

94 — 4 – 96

- Above average and gaining ground
- Above average but losing ground
- Below average but gaining ground
- Below average and losing ground

Vibrant local labour markets

Schools above standard: 92.3%

67 — 3 – 88

Graduates in workforce: 47.7%

82 — 27 – 92

In-work training: 18.2%

26 — 5 – 83

Working-age population & projected change by 2030

574,997

1.0%

Well-connected, accessible places

Broadband speed: 57.7 mb/s

55 — 4 – 94

Commute time: 32.9 mins

73 — 1 – 93

Home working index: 3.5

83 — 5 – 93

Median house prices: £370,000

80 — 42 – 86

World-class, innovative businesses[3]

R&D per head (ILT2): £1,617

95 — 42 – 95

Innovation activity (ITL1): 40.2%

76

High growth firms: 5.4%

88 — 4 – 100

Exports intensity: 35.3% of GVA

83 — 6 – 96

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

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Milton Keynes

South East

Classification:
Predominantly Urban

Economic & social outcomes[1, 2]

Household income: £21,717 p/c

63

15 95

Employment rate: 79.6%

83

20 98

Deprivation index: 18.0

33

0 76

Life satisfaction index: 7.6

33

0 92

Scorecard key

- Percentile of ITL3 sub-region[3]
- Range of ITL3 sub-regions within ITL1 region[3]
- Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £42.26

88

4 96

- Above average and gaining ground
- Above average but losing ground
- Below average but gaining ground
- Below average and losing ground

Vibrant local labour markets

Schools above standard: 81.8%

21

3 88

Graduates in workforce: 43.9%

75

27 92

In-work training: 23.5%

79

5 83

Working-age population & projected change by 2030

168,784

1.8%

Well-connected, accessible places

Broadband speed: 54.8 mb/s

43

4 94

Commute time: 26.2 mins

39

1 93

Home working index: 3.4

78

5 93

Median house prices: £297,250

70

42 86

World-class, innovative businesses[3]

R&D per head (ILT2): £1,617

95

42 95

Innovation activity (ITL1): 40.2%

76

High growth firms: 4.2%

54

4 100

Exports intensity: 20.1% of GVA

49

6 96

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

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Buckinghamshire

South East

Classification:
Urban with Significant Rural

Economic & social outcomes[1, 2]

Household income: £30,079 p/c

94 — 15 – 95

Employment rate: 78.6%

75 — 20 – 98

Deprivation index: 10.1

1 — 0 – 76

Life satisfaction index: 7.7

73 — 0 – 92

Scorecard key

- Percentile of ITL3 sub-region[3]
- Range of ITL3 sub-regions within ITL1 region[3]
- Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £34.96

69 — 4 – 96

- Above average and gaining ground
- Above average but losing ground
- Below average but gaining ground
- **Below average and losing ground**

Vibrant local labour markets

Schools above standard: 94.1%

73 — 3 – 88

Graduates in workforce: 45.2%

77 — 27 – 92

In-work training: 16.1%

5 — 5 – 83

Working-age population & projected change by 2030

328,473

1.5%

Well-connected, accessible places

Broadband speed: 47.6 mb/s

27 — 4 – 94

Commute time: 35.8 mins

81 — 1 – 93

Home working index: 3.6

90 — 5 – 93

Median house prices: £399,950

83 — 42 – 86

World-class, innovative businesses[3]

R&D per head (ILT2): £1,617

95 — 42 – 95

Innovation activity (ITL1): 40.2%

76

High growth firms: 4.8%

77 — 4 – 100

Exports intensity: 24.2% of GVA

64 — 6 – 96

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

Oxfordshire CC

South East

Classification: Predominantly Rural

Economic & social outcomes[1, 2]

Household income: £25,071 p/c

83

15 95

Employment rate: 82.6%

97

20 98

Deprivation index: 11.6

3

0 76

Life satisfaction index: 7.7

58

0 92

Scorecard key

- Percentile of ITL3 sub-region[3]
- Range of ITL3 sub-regions within ITL1 region[3]
- Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

- Above average and gaining ground
- Above average but losing ground
- Below average but gaining ground
- **Below average and losing ground**

Productivity (GVA per hour): £33.57

58

4 96

Vibrant local labour markets

Schools above standard: 91.2%

60

3 88

Graduates in workforce: 50.9%

86

27 92

In-work training: 21.2%

64

5 83

Working-age population & projected change by 2030

432,168

1.8%

Well-connected, accessible places

Broadband speed: 56.2 mb/s

50

4 94

Commute time: 27.8 mins

49

1 93

Home working index: 3.5

86

5 93

Median house prices: £350,000

76

42 86

World-class, innovative businesses[3]

R&D per head (ILT2): £1,617

95

42 95

Innovation activity (ITL1): 40.2%

76

High growth firms: 5.2%

86

4 100

Exports intensity: 26.5% of GVA

69

6 96

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

Brighton and Hove

South East

Classification:
Predominantly Urban

Economic & social outcomes[1, 2]

Household income: £22,437 p/c

69

15 95

Employment rate: 75.2%

39

20 98

Deprivation index: 20.8

47

0 76

Life satisfaction index: 7.6

36

0 92

Scorecard key

Percentile of ITL3 sub-region[3]

Range of ITL3 sub-regions within ITL1 region[3]

Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £32.55

49

4 96

Above average and gaining ground

Above average but losing ground

Below average but gaining ground

Below average and losing ground

Vibrant local labour markets

Schools above standard: 90.0%

57

3 88

Graduates in workforce: 56.4%

92

27 92

In-work training: 23.7%

80

5 83

Working-age population & projected change by 2030

207,228

3.3%

Well-connected, accessible places

Broadband speed: 76.0 mb/s

92

4 94

Commute time: 33.1 mins

73

1 93

Home working index: 3.6

92

5 93

Median house prices: £365,000

80

42 86

World-class, innovative businesses[3]

R&D per head (ILT2): £502

61

42 95

Innovation activity (ITL1): 40.2%

76

High growth firms: 7.0%

100

4 100

Exports intensity: 20.0% of GVA

48

6 96

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

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East Sussex CC

South East

Classification:
Urban with Significant Rural

Economic & social outcomes[1, 2]

Household income: £22,881 p/c

73

15 95

Employment rate: 77.9%

66

20 98

Deprivation index: 19.7

42

0 76

Life satisfaction index: 7.6

45

0 92

Scorecard key

- Percentile of ITL3 sub-region[3]
- Range of ITL3 sub-regions within ITL1 region[3]
- Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £26.19

4

4 96

- Above average and gaining ground
- Above average but losing ground
- Below average but gaining ground
- **Below average and losing ground**

Vibrant local labour markets

Schools above standard: 92.6%

69

3 88

Graduates in workforce: 35.6%

44

27 92

In-work training: 17.5%

19

5 83

Working-age population & projected change by 2030

317,861

0.3%

Well-connected, accessible places

Broadband speed: 39.8 mb/s

5

4 94

Commute time: 35.1 mins

79

1 93

Home working index: 3.3

62

5 93

Median house prices: £292,000

68

42 86

World-class, innovative businesses[3]

R&D per head (ILT2): £502

61

42 95

Innovation activity (ITL1): 40.2%

76

High growth firms: 3.0%

5

4 100

Exports intensity: 15.0% of GVA

23

6 96

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

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West Surrey

South East

Classification:
Predominantly Urban

Economic & social outcomes[1, 2]

Household income: £30,748 p/c

95

15 — 95

Employment rate: 80.8%

91

20 — 98

Deprivation index: 9.9

0

0 — 76

Life satisfaction index: 7.7

61

0 — 92

Scorecard key

- Percentile of ITL3 sub-region[3]
- Range of ITL3 sub-regions within ITL1 region[3]
- Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £43.45

92

4 — 96

- **Above average and gaining ground**
- Above average but losing ground
- Below average but gaining ground
- Below average and losing ground

Vibrant local labour markets

Schools above standard: 98.1%

86

3 — 88

Graduates in workforce: 51.0%

87

27 — 92

In-work training: 18.0%

23

5 — 83

Working-age population & projected change by 2030

488,281

-1.7%

Well-connected, accessible places

Broadband speed: 62.0 mb/s

68

4 — 94

Commute time: 35.5 mins

80

1 — 93

Home working index: 3.5

87

5 — 93

Median house prices: £450,000

86

42 — 86

World-class, innovative businesses[3]

R&D per head (ILT2): £502

61

42 — 95

Innovation activity (ITL1): 40.2%

76

High growth firms: 4.7%

72

4 — 100

Exports intensity: 33.1% of GVA

82

6 — 96

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

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East Surrey

South East

Classification:
Predominantly Urban

Economic & social outcomes[1, 2]

Household income: £29,971 p/c

93 — 15 — 95

Employment rate: 83.0%

98 — 20 — 98

Deprivation index: 10.5

2 — 0 — 76

Life satisfaction index: 7.8

83 — 0 — 92

Scorecard key

Percentile of ITL3 sub-region[3]

Range of ITL3 sub-regions within ITL1 region[3]

Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £46.06

93 — 4 — 96

Above average and gaining ground

Above average but losing ground

Below average but gaining ground

Below average and losing ground

Vibrant local labour markets

Schools above standard: 98.1%

86 — 3 — 88

Graduates in workforce: 53.6%

90 — 27 — 92

In-work training: 18.0%

23 — 5 — 83

Working-age population & projected change by 2030

243,633

0.5%

Well-connected, accessible places

Broadband speed: 52.2 mb/s

35 — 4 — 94

Commute time: 40.2 mins

93 — 1 — 93

Home working index: 3.4

77 — 5 — 93

Median house prices: £450,000

86 — 42 — 86

World-class, innovative businesses[3]

R&D per head (ILT2): £502

61 — 42 — 95

Innovation activity (ITL1): 40.2%

76

High growth firms: 3.7%

22 — 4 — 100

Exports intensity: 30.0% of GVA

76 — 6 — 96

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

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West Sussex (South West)

South East

Classification:
Predominantly Urban

Economic & social outcomes[1, 2]

Household income: £23,276 p/c

74
15 95

Employment rate: 79.5%

81
20 98

Deprivation index: 16.9

27
0 76

Life satisfaction index: 6.7

0
0 92

Scorecard key

- Percentile of ITL3 sub-region[3]
- Range of ITL3 sub-regions within ITL1 region[3]
- Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £33.65

60
4 96

- Above average and gaining ground
- Above average but losing ground
- Below average but gaining ground
- **Below average and losing ground**

Vibrant local labour markets

Schools above standard: 91.9%

64
3 88

Graduates in workforce: 40.3%

62
27 92

In-work training: 19.7%

47
5 83

Working-age population & projected change by 2030

259,521

3.2%

Well-connected, accessible places

Broadband speed: 50.6 mb/s

33
4 94

Commute time: 29.3 mins

58
1 93

Home working index: 3.2

42
5 93

Median house prices: £310,000

73
42 86

World-class, innovative businesses[3]

R&D per head (ILT2): £502

61
42 95

Innovation activity (ITL1): 40.2%

76

High growth firms: 4.5%

64
4 100

Exports intensity: 19.0% of GVA

43
6 96

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

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West Sussex (North East)

South East

Classification:
Urban with Significant Rural

Economic & social outcomes[1, 2]

Household income: £24,809 p/c

80

15 95

Employment rate: 81.0%

92

20 98

Deprivation index: 11.6

4

0 76

Life satisfaction index: 7.8

92

0 92

Scorecard key

Percentile of ITL3 sub-region[3]

Range of ITL3 sub-regions within ITL1 region[3]

Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £33.42

56

4 96

Above average and gaining ground

Above average but losing ground

Below average but gaining ground

Below average and losing ground

Vibrant local labour markets

Schools above standard: 91.9%

64

3 88

Graduates in workforce: 43.6%

73

27 92

In-work training: 19.7%

47

5 83

Working-age population & projected change by 2030

247,488

3.4%

Well-connected, accessible places

Broadband speed: 50.5 mb/s

33

4 94

Commute time: 31.5 mins

68

1 93

Home working index: 3.6

93

5 93

Median house prices: £360,000

78

42 86

World-class, innovative businesses[3]

R&D per head (ILT2): £502

61

42 95

Innovation activity (ITL1): 40.2%

76

High growth firms: 4.3%

58

4 100

Exports intensity: 42.3% of GVA

90

6 96

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

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Portsmouth

South East

Classification:
Predominantly Urban

Economic & social outcomes[1, 2]

Household income: £16,297 p/c
15
15 95

Employment rate: 72.6%
20
20 98

Deprivation index: 26.9
76
0 76

Life satisfaction index: 7.7
59
0 92

Scorecard key

Percentile of ITL3 sub-region[3]
Range of ITL3 sub-regions within ITL1 region[3]
Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £33.76
61
4 96

Above average and gaining ground
Above average but losing ground
Below average but gaining ground
Below average and losing ground

Vibrant local labour markets

Schools above standard: 80.0%
15
3 88

Graduates in workforce: 33.1%
33
27 92

In-work training: 22.4%
73
5 83

Working-age population & projected change by 2030
144,861
2.1%

Well-connected, accessible places

Broadband speed: 78.1 mb/s
94
4 94

Commute time: 26.4 mins
40
1 93

Home working index: 3.2
42
5 93

Median house prices: £220,000
42
42 86

World-class, innovative businesses[3]

R&D per head (ILT2): £531
70
42 95

Innovation activity (ITL1): 40.2%
76

High growth firms: 4.1%
50
4 100

Exports intensity: 31.2% of GVA
77
6 96

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

Southampton

South East

Classification: Predominantly Urban

Economic & social outcomes[1, 2]

Household income: £16,994 p/c

23

15 95

Employment rate: 74.2%

32

20 98

Deprivation index: 26.9

75

0 76

Life satisfaction index: 7.6

25

0 92

Scorecard key

- Percentile of ITL3 sub-region[3]
- Range of ITL3 sub-regions within ITL1 region[3]
- Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £40.04

83

4 96

- Above average and gaining ground
- **Above average but losing ground**
- Below average but gaining ground
- Below average and losing ground

Vibrant local labour markets

Schools above standard: 63.6%

4

3 88

Graduates in workforce: 38.1%

55

27 92

In-work training: 23.8%

83

5 83

Working-age population & projected change by 2030

171,906

4.0%

Well-connected, accessible places

Broadband speed: 57.6 mb/s

53

4 94

Commute time: 27.8 mins

50

1 93

Home working index: 3.3

57

5 93

Median house prices: £220,000

42

42 86

World-class, innovative businesses[3]

R&D per head (ILT2): £531

70

42 95

Innovation activity (ITL1): 40.2%

76

High growth firms: 3.4%

12

4 100

Exports intensity: 20.9% of GVA

52

6 96

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

CBI

Isle of Wight

South East

Classification: Predominantly Rural

Economic & social outcomes[1, 2]

Household income: £18,366 p/c

32

15 95

Employment rate: 73.3%

25

20 98

Deprivation index: 23.3

57

0 76

Life satisfaction index: 7.6

44

0 92

Scorecard key

Percentile of ITL3 sub-region[3]

Range of ITL3 sub-regions within ITL1 region[3]

Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £27.83

14

4 96

Above average and gaining ground

Above average but losing ground

Below average but gaining ground

Below average and losing ground

Vibrant local labour markets

Schools above standard: 60.0%

3

3 88

Graduates in workforce: 31.8%

27

27 92

In-work training: 19.3%

43

5 83

Working-age population & projected change by 2030

79,564

-1.5%

Well-connected, accessible places

Broadband speed: 39.8 mb/s

5

4 94

Commute time: 18.3 mins

1

1 93

Home working index: 3.0

5

5 93

Median house prices: £220,000

42

42 86

World-class, innovative businesses[3]

R&D per head (ILT2): £531

70

42 95

Innovation activity (ITL1): 40.2%

76

High growth firms: 2.7%

4

4 100

Exports intensity: 22.3% of GVA

57

6 96

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

LLOYDS BANKING GROUP

South Hampshire

South East

Classification:
Predominantly Urban

Economic & social outcomes[1, 2]

Household income: £21,117 p/c

58

15 95

Employment rate: 78.2%

69

20 98

Deprivation index: 15.0

17

0 76

Life satisfaction index: 7.7

73

0 92

Scorecard key

Percentile of ITL3 sub-region[3]

Range of ITL3 sub-regions within ITL1 region[3]

Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Above average and gaining ground

Above average but losing ground

Below average but gaining ground

Below average and losing ground

Productivity (GVA per hour): £37.71

83

4 96

Vibrant local labour markets

Schools above standard: 86.8%

42

3 88

Graduates in workforce: 37.7%

53

27 92

In-work training: 18.6%

31

5 83

Working-age population & projected change by 2030

276,803

0.8%

Well-connected, accessible places

Broadband speed: 61.9 mb/s

67

4 94

Commute time: 25.5 mins

33

1 93

Home working index: 3.2

51

5 93

Median house prices: £280,000

63

42 86

World-class, innovative businesses[3]

R&D per head (ILT2): £531

70

42 95

Innovation activity (ITL1): 40.2%

76

High growth firms: 4.3%

61

4 100

Exports intensity: 32.3% of GVA

80

6 96

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

Central Hampshire

South East

Classification: Predominantly Rural

Economic & social outcomes[1, 2]

Household income: £26,302 p/c

Percentile: 88 — Range: 15 – 95

Employment rate: 77.7%

Percentile: 64 — Range: 20 – 98

Deprivation index: 11.4

Percentile: 2 — Range: 0 – 76

Life satisfaction index: 7.7

Percentile: 62 — Range: 0 – 92

Scorecard key

- Percentile of ITL3 sub-region[3]
- Range of ITL3 sub-regions within ITL1 region[3]
- Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £35.11

Percentile: 70 — Range: 4 – 96

- Above average and gaining ground
- Above average but losing ground
- **Below average but gaining ground**
- Below average and losing ground

Vibrant local labour markets

Schools above standard: 86.8%

Percentile: 42 — Range: 3 – 88

Graduates in workforce: 48.0%

Percentile: 84 — Range: 27 – 92

In-work training: 18.6%

Percentile: 31 — Range: 5 – 83

Working-age population & projected change by 2030

320,578

-0.6%

Well-connected, accessible places

Broadband speed: 44.3 mb/s

Percentile: 21 — Range: 4 – 94

Commute time: 30.0 mins

Percentile: 62 — Range: 1 – 93

Home working index: 3.4

Percentile: 68 — Range: 5 – 93

Median house prices: £350,000

Percentile: 76 — Range: 42 – 86

World-class, innovative businesses[3]

R&D per head (ILT2): £531

Percentile: 70 — Range: 42 – 95

Innovation activity (ITL1): 40.2%

Percentile: 76

High growth firms: 4.5%

Percentile: 65 — Range: 4 – 100

Exports intensity: 40.8% of GVA

Percentile: 89 — Range: 6 – 96

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
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3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

North Hampshire

South East

Classification: Predominantly Urban

Economic & social outcomes[1, 2]

Household income: £25,364 p/c

84

15 — 95

Employment rate: 81.3%

94

20 — 98

Deprivation index: 11.7

5

0 — 76

Life satisfaction index: 7.7

52

0 — 92

Scorecard key

- Percentile of ITL3 sub-region[3]
- Range of ITL3 sub-regions within ITL1 region[3]
- Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £49.12

96

4 — 96

- Above average and gaining ground
- Above average but losing ground
- Below average but gaining ground
- Below average and losing ground

Vibrant local labour markets

Schools above standard: 86.8%

42

3 — 88

Graduates in workforce: 43.5%

73

27 — 92

In-work training: 18.6%

31

5 — 83

Working-age population & projected change by 2030

230,146

-2.2%

Well-connected, accessible places

Broadband speed: 63.3 mb/s

70

4 — 94

Commute time: 29.9 mins

61

1 — 93

Home working index: 3.5

84

5 — 93

Median house prices: £337,000

75

42 — 86

World-class, innovative businesses[3]

R&D per head (ILT2): £531

70

42 — 95

Innovation activity (ITL1): 40.2%

76

High growth firms: 5.6%

91

4 — 100

Exports intensity: 57.3% of GVA

96

6 — 96

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

CBI

Medway

South East

Classification:
Predominantly Urban

Economic & social outcomes[1, 2]

Household income: £18,885 p/c

36

15 95

Employment rate: 73.6%

27

20 98

Deprivation index: 23.9

59

0 76

Life satisfaction index: 7.7

67

0 92

Scorecard key

- Percentile of ITL3 sub-region[3]
- Range of ITL3 sub-regions within ITL1 region[3]
- Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £35.38

73

4 96

- Above average and gaining ground
- Above average but losing ground
- **Below average but gaining ground**
- Below average and losing ground

Vibrant local labour markets

Schools above standard: 100.0%

88

3 88

Graduates in workforce: 32.9%

32

27 92

In-work training: 20.3%

55

5 83

Working-age population & projected change by 2030

175,268

0.3%

Well-connected, accessible places

Broadband speed: 72.1 mb/s

83

4 94

Commute time: 36.4 mins

83

1 93

Home working index: 3.1

23

5 93

Median house prices: £250,000

56

42 86

World-class, innovative businesses[3]

R&D per head (ILT2): £348

42

42 95

Innovation activity (ITL1): 40.2%

76

High growth firms: 3.9%

36

4 100

Exports intensity: 14.2% of GVA

18

6 96

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

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CBI

Kent Thames Gateway

South East

Classification:
Urban with Significant Rural

Economic & social outcomes[1, 2]

Household income: £20,598 p/c

55

15 95

Employment rate: 81.3%

94

20 98

Deprivation index: 22.9

55

0 76

Life satisfaction index: 7.7

67

0 92

Scorecard key

Percentile of ITL3 sub-region[3]

Range of ITL3 sub-regions within ITL1 region[3]

Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £32.18

46

4 96

Above average and gaining ground

Above average but losing ground

Below average but gaining ground

Below average and losing ground

Vibrant local labour markets

Schools above standard: 86.2%

37

3 88

Graduates in workforce: 32.2%

30

27 92

In-work training: 20.1%

52

5 83

Working-age population & projected change by 2030

227,609

7.9%

Well-connected, accessible places

Broadband speed: 52.6 mb/s

36

4 94

Commute time: 35.2 mins

80

1 93

Home working index: 3.2

40

5 93

Median house prices: £283,000

65

42 86

World-class, innovative businesses[3]

R&D per head (ILT2): £348

42

42 95

Innovation activity (ITL1): 40.2%

76

High growth firms: 3.2%

7

4 100

Exports intensity: 12.2% of GVA

11

6 96

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

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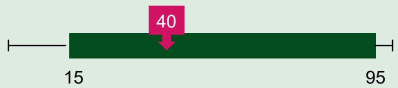
East Kent

South East

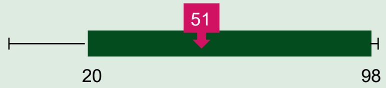
Classification: Predominantly Urban

Economic & social outcomes[1, 2]

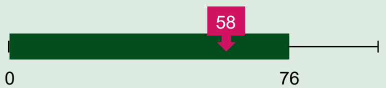
Household income: £19,379 p/c



Employment rate: 76.2%



Deprivation index: 23.3



Life satisfaction index: 7.5

Scorecard key

Percentile of ITL3 sub-region[3]

Range of ITL3 sub-regions within ITL1 region[3]

Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £30.05

Above average and gaining ground

Above average but losing ground

Below average but gaining ground

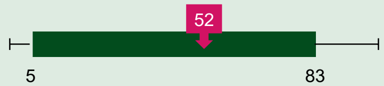
Below average and losing ground

Vibrant local labour markets

Schools above standard: 86.2%

Graduates in workforce: 31.8%

In-work training: 20.1%



Working-age population & projected change by 2030

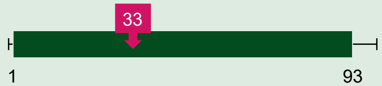
321,761

4.1%

Well-connected, accessible places

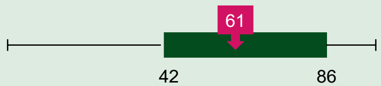
Broadband speed: 39.7 mb/s

Commute time: 25.5 mins



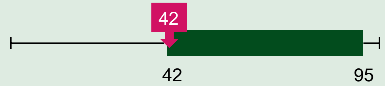
Home working index: 3.3

Median house prices: £270,000



World-class, innovative businesses[3]

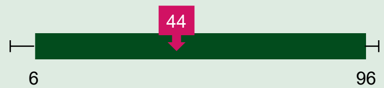
R&D per head (ILT2): £348



Innovation activity (ITL1): 40.2%

High growth firms: 4.4%

Exports intensity: 19.1% of GVA



1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

CBI

Mid Kent

South East

Classification:
Urban with Significant Rural

Economic & social outcomes[1, 2]

Household income: £22,196 p/c
67
15 — 95

Employment rate: 80.7%
90
20 — 98

Deprivation index: 17.4
30
0 — 76

Life satisfaction index: 7.8
78
0 — 92

Scorecard key

- Percentile of ITL3 sub-region[3]
- Range of ITL3 sub-regions within ITL1 region[3]
- Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

Productivity (GVA per hour): £29.84
29
4 — 96

- Above average and gaining ground
- Above average but losing ground
- **Below average but gaining ground**
- Below average and losing ground

Vibrant local labour markets

Schools above standard: 86.2%
37
3 — 88

Graduates in workforce: 39.0%
58
27 — 92

In-work training: 20.1%
52
5 — 83

Working-age population & projected change by 2030
182,425
7.6%

Well-connected, accessible places

Broadband speed: 52.7 mb/s
39
4 — 94

Commute time: 34.3 mins
76
1 — 93

Home working index: 3.1
22
5 — 93

Median house prices: £307,788
72
42 — 86

World-class, innovative businesses[3]

R&D per head (ILT2): £348
42
42 — 95

Innovation activity (ITL1): 40.2%
76

High growth firms: 3.9%
35
4 — 100

Exports intensity: 16.3% of GVA
30
6 — 96

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

LLOYDS BANKING GROUP

CBI

West Kent

South East

Classification:
Urban with Significant Rural

Economic & social outcomes[1, 2]

Household income: £27,655 p/c

89

15 95

Employment rate: 76.1%

48

20 98

Deprivation index: 12.4

9

0 76

Life satisfaction index: 7.8

81

0 92

Scorecard key

Percentile of ITL3 sub-region[3]

Range of ITL3 sub-regions within ITL1 region[3]

Range of English ITL3 sub-regions[3]

Productivity drivers & barriers[1, 2]

- Above average and gaining ground
- Above average but losing ground
- Below average but gaining ground
- Below average and losing ground

Productivity (GVA per hour): £41.16

85

4 96

Vibrant local labour markets

Schools above standard: 86.2%

37

3 88

Graduates in workforce: 46.2%

80

27 92

In-work training: 20.1%

52

5 83

Working-age population & projected change by 2030

222,140

3.4%

Well-connected, accessible places

Broadband speed: 46.3 mb/s

25

4 94

Commute time: 37.8 mins

87

1 93

Home working index: 3.5

79

5 93

Median house prices: £380,000

81

42 86

World-class, innovative businesses[3]

R&D per head (ILT2): £348

42

42 95

Innovation activity (ITL1): 40.2%

76

High growth firms: 5.2%

85

4 100

Exports intensity: 9.3% of GVA

6

6 96

1) Indicators are plotted on a percentile scale of all ITL3 areas in England.
2) For indices, higher scores imply higher levels of deprivation/life satisfaction/home working potential, as appropriate.
3) For R&D sub-regional data and percentiles are for ITL2 level regions. For innovation activity data and percentiles are for ITL1 regions only.

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Notes and sources

Regions & classifications

Units of analysis
The geographic areas for much of our analysis are defined by the International Territorial Levels (ITLs), which were introduced in 2021 as a successor to the EU's Nomenclature of Units for Territorial Statistics (NUTS) classifications. There are two different types of scorecards:

- ITL1 regions: Nine major English regions, with an average population of 6.3m, ranging from a minimum of 2.7m (North East) to 9.2m (South East).
- ITL3 regions: 133 smaller regions with an average population of 423k, ranging from a minimum of 106k (Darlington) to a maximum of 1.2m (Hertfordshire).

In all but two cases the ITL3 and the old NUTS3 boundaries are aligned. The exceptions are "Bournemouth and Poole" and "Dorset CC", which under ITLs are classified as "Bournemouth, Christchurch and Poole", and "Dorset". Where possible we have created ITL data for these two sub-regions using Local Authority District (LAD) data.

Rural-urban classification
Region is defined as: Predominantly Rural if the rural population share is greater than or equal to 50%; Urban With Significant Rural if the rural population share is 26%-49%; Predominantly Urban if the rural population share is less than or equal to 25%. ONS 2011 Census data. Percentiles are based on ITL regions, mapped from NUTS3 and LAD data.

Economic & social outcomes

Household income – £ per person
Gross disposable household income per capita. Current basic prices. ONS 2018 data. Percentiles are based on ITL regions, mapped from NUTS3 and LAD data.

Employment rate – %
Employment rate for 16-64 year-old residents. ONS data for October 2019 to September 2020. Percentiles are based on ITL regions, mapped from NUTS3 and LAD data.

Deprivation index
Index of Multiple Deprivation Average Score, where the larger the score, the more deprived the area. Ministry of Housing, Communities & Local Government data for 2019. Scores derived from LAD values, weighted by population. Percentiles are based on ITL regions, mapped from NUTS3 and LAD data.

Life satisfaction index
Average rating, ranging from 0 to 10, where 10 implies complete satisfaction. ONS data for 2019/20. Data derived from LAD values, weighted by population. Percentiles based on NUTS regions, mapped from LAD data.

Productivity

Productivity – GVA per hour worked, £
Gross value added per hour worked in £, nominal (smoothed). ONS 2018 data. Percentiles are based on ITL regions, mapped from NUTS3 and LAD data.

Productivity – convergence/divergence taxonomy
The level of productivity is defined by gross value added per hour in £, nominal (smoothed). ONS 2018 data. Productivity growth is annual average % change in real value added per hour over 2009-18. NUTS regions. The methodology is based on an approach used in "UK Regional Productivity Differences: An Evidence Review", Industry Strategy Council.

Notes and sources

Vibrant Local Labour Markets

Schools above standard – %
Percentage of schools categorised as above floor standard. Department for Education 2017/18 data. Values derived from Local Education Authority (LEA) data. Where the LEA encompasses more than one ITL3 region, the value for the LEA is used for all relevant sub-regions.

Graduates in workforce – %
Percentage of 16-64 year-old population with NVQ4+. ONS data for 2019. Percentiles are based on ITL regions, mapped from NUTS3 and LAD data.

In-work training – %
Percentage of firms offering management training. Data from Department for Education, Employers Skills Survey 2019. Values derived from LEA data. Where the LEA corresponds to more than one ITL3 region, the value for the LEA is used for all relevant sub-regions.

Working-age population
Number of people aged 16-64. ONS data for 2019. Projected % change, 2019-2030. Percentiles are based on ITL regions, mapped from NUTS3 and LAD data.

Well-Connected Places

Broadband Speed – mb/s
Median download speed in megabits per second. Ofcom data for 2020. Values are derived from LAD data, weighted by population. Percentiles are based on ITL regions, mapped from LAD data.

Commute times – minutes
Usual home to work travel time in minutes. Figures provided by ONS. 2019 data. Percentiles based on NUTS regions.

Home working index
CBI index of ability to home work, with scores ranging from 0 to 5, where 5 implies the ability for all tasks to be carried out remotely. Calculated from ONS "Which jobs can be done from home?" (derived from US Labor Department) and ONS Annual Population Survey on occupational employment by NUTS3, 2018 data. Percentiles based on NUTS regions.

Median house prices – £
Median price paid (all house types). ONS data for year ending September 2020. Percentiles based on NUTS regions.

World-class, innovative businesses

R&D per head – £
Gross domestic R&D expenditure (GERD), £ per inhabitant. Eurostat data for 2018. Data are only available at NUTS1 and NUTS2 levels, therefore each NUTS3 sub-region takes the value of the larger NUTS2 region of which it is a part. Percentiles are based on NUTS2 regions.

Innovation activity – %
Percentage of businesses that are classified as innovation active. Data from BEIS, UK Innovation Survey for 2016-18. Data are only available at NUTS1 level, therefore each NUTS3 sub-region takes the value of the larger NUTS1 region of which it is a part. Percentiles also based on NUTS1 regions.

High Growth Firms – %
Percentage of businesses that are classified as "high growth". ONS data for 2019. Percentiles are based on ITL regions, mapped from LAD data.

Exporting intensity – % of GVA
Exports of goods and services as a % of gross value added. Data derived from HMRC and ONS. Percentiles based on NUTS regions.