

DEALING WITH CHALLENGES OF COASTAL COMMUNITIES IN GREATER ESSEX

KEY RECOMMENDATIONS

The wide-ranging nature of issues affecting coastal communities, as set out in this report, means that the Commission wishes to highlight a number of key recommendations. From the national perspective there is a requirement for government to better understand the issues impacting on coastal communities across the UK. Specific initiatives in Essex that Government should support include:

- *Approving new Institutes of Technology in Essex:* Investment in skills in Essex needs to be a priority for Government. Serious consideration should be given to expressions of interest in new Institutes of Technology proposed in three sectors in Essex: transport and logistics; mechanical engineering and construction; and advanced engineering linked to rail and construction. The Institute for transport and logistics is being proposed by South Essex College of Further and Higher Education in partnership with DP World, Port of Tilbury and Stobart Group.
- *Supporting offshore and other energy* Providing greater support and impetus to developing the South East Centre for Offshore Renewable Engineering (CORE), which includes Harwich and Brightlingsea, one of only six such centres around England. Eventual approval of a new nuclear reactor at Bradwell would establish Essex as a key long-term provider of nuclear energy.

At an Essex wide and local level, key recommendations span:

- *Stronger strategic focus* at county level on addressing issues affecting coastal communities. This should work towards a more joined-up approach to coastal issues. Responsibility for delivery of the strategy could involve a county-wide or regional grouping, such as the SELEP Coastal Communities Group or Essex Coastal Forum.
- *Establishing coastal path* Essex Highways need to work up a plan for a coastal path in Essex working in conjunction with Natural England. This would provide an opportunity for enhancing seaside tourism and coastal regeneration
- *Promoting trips to seaside* Visit Essex and local authorities should continue to review initiatives required to promote more visits to coastal communities. This would include developing cultural events promoting heritage and arts, developing the sea front, and expanding marine recreation such as sailing, angling and water sports.
- *Improved transport infrastructure:* Key link roads around Thurrock need to be constructed to maximise the benefit of the new Lower Thames crossing. Roads into Tendring require upgrading.
- *Allocating more workspace:* Local authorities need to allocate sufficient land to address the shortage of workspace and business premises.
- *Extending broadband:* Superfast Essex to fulfil pledge to extend broadband to reach nearly everyone by 2021.
- *Upskilling:* Expanding skills provision to meet demands of sectors, such as logistics, care, health and tourism. Upskilling spans new models of training for creative industries dominated by self-employment; putting in place extra-curricular learning so that students can engage with a range of career options; and improved careers and education advice so that students better understand the range of further and higher education options post-16.

SUMMARY OF KEY POINTS

Evidence on key challenges

Independent research has found that the issues affecting seasonal towns across the UK are distinct from those affecting older industrial towns in the north and midlands. This applies even though some of the outcomes related to higher unemployment, lower pay and greater levels of deprivation are similar. Broad findings for UK coastal towns point to higher inward migration, largely based on personal choice but also due to displacement; rising employment that may be outweighed by net inflow of people; higher hidden levels of joblessness; and better adaptation by some coastal towns to the historic shift to foreign holidays, with the South West and South East faring better in this regard than other regions.

The broader UK analysis finds some echoes in Essex. Nominal GDP for Essex coastal districts as a group has diverged from non-coastal districts. Even so, it is important to differentiate the issues that affect different coastal towns across Essex. The five districts and two unitary authorities of Greater Essex that front the coast and Thames estuary face a range of challenges. Particular problems face places such as Clacton, Harwich and Jaywick, all in Tendring. Other coastal communities, including other towns in Tendring, are faring better. Evidence set out in this working paper shows how the scale of the challenge varies between the authorities. Out of a total of 14 districts and unitary authorities in Greater Essex, the seven coastal authorities in general do not score well on the following criteria:

- *Economic inactivity and unemployment:* Four of the six authorities with highest economic labour market inactivity are in coastal districts.
- *Pay:* Five out of the seven authorities where gross pay is lowest are coastal.
- *Qualifications:* Five of the six authorities with lowest share to reach Level 4 are coastal.
- *A-Levels:* In core state-funded schools only four out 25 schools in coastal districts attained results that were at least in line with the England average.
- *Share of population 65+:* The four authorities with the highest share of residents aged 65+ are all coastal.
- *Commuting:* The four authorities with the lowest net inflow of commuters relative to outflow are coastal, pointing to greater dependence on commuting to work outside the authority.
- *Deprivation:* Five of the six authorities with the largest share of local areas in the two most deprived deciles are coastal.

Positive findings for coastal districts from economic indicators are fewer:

- *Tourism:* The number of visits is highest to the three coastal districts.
- *Apprenticeship starts:* Two of the three authorities with highest apprenticeship starts are coastal.
- *Start-ups* are higher in general across Greater Essex, including coastal districts, than the UK average.

While challenges face coastal districts they also need to be viewed in the context of significant opportunities in sectors such as tourism, ports and logistics, offshore and other energy, agri-tech, and care and health. The opportunity to meet these challenges is set out here.

Dealing with challenges

Regenerating coastal communities involves a broad mix of initiatives, often small scale. For tourism this should include improving the offer to visitors covering culture, special events, retail and local accommodation. Investment in good transport links with nearby urban centres and the region generally is vital to improved connectivity. Upgrading of skills is also key given the shortfall in many coastal districts. This will be crucial to underpinning expansion of some sectors such as logistics and care. Individual communities may also look to target particular growth sectors. Expanding availability of suitable business premises is crucial to development of local business as well as ensuring access to superfast broadband for businesses and residents. Initiatives need to connect with vulnerable households and address problems associated with deprivation.

Both the Essex Coastal Forum and the SELEP Coastal Communities Group have a county wide or regional role in addressing coastal issues. There is scope to review the current remit of these groups. In particular it would be useful to consider how a county-wide grouping could take a more proactive approach to managing coastal issues across Essex building on the partnership approach that is already established. The issues that could provide a focus for this grouping include shoreline management, developing seaside tourism, and promoting heritage and culture. It would also help to maximize the impact of the Coastal Community Teams and also for funding secured from the Coastal Communities Fund.

Developing seaside tourism: Apart from Southend where numbers have been rising, the market for tourism has been waning over the past decade. Opportunities exist to promote tourism, recreation, history and culture and landscape across Essex:

- Enhancement of tourism offer often requires implementation of small incremental changes.
- Visit Essex should continue to work with local authorities and other local partners and review what additional steps can be taken to promote visits to coastal communities.
- Establishment of a coastal path would provide an opportunity for seaside tourism and coastal regeneration. Essex Highways need to continue to develop a plan for a coastal path in Essex working in conjunction with Natural England which is determining the route of an England Coast Path.

Developing transport links: A number of transport schemes are high priority because of their linkage to supporting the economy of coastal districts. Key developments required in coastal areas include the Lower Thames Crossing and accompanying new roads and junctions to link the crossing with Tilbury and London Gateway ports, as well as to the A13, A127 and M25. Also important is the planned investment in upgrading the A13; improvements to the A120 into Harwich and the A133 road into Clacton.

Expanding provision of care and assisted living along with health care: This is a major growth sector because of the high proportion of retired people aged 65+ resident in coastal communities. Investment in technological advancements and innovation would enable more independence and less direct support for some people. Investment in technology that enables more independent living generates a return in state spending by enabling people to live in their homes for longer and therefore less dependent on state support. Coastal districts in Essex are well placed to capitalise on this opportunity. Alongside such investment there is a requirement to improve the perception of care as an industry. The care sector is more prevalent in coastal districts because of the demographic profile. Demand for care is set to grow so more people with appropriate skills will be required.

Gaining accreditation and upskilling provide an opportunity for people to improve employability and earning potential.

Exploiting the potential of ports and logistics: Ports and logistics are particularly important for South Essex and Tendring. The development of the Port of Tilbury and London Gateway is contributing to the revival of the local economy, particularly in Thurrock. Harwich has significant potential for growth in offshore energy.

Key drivers for the future development of logistics include effective deployment of new technologies which will require greater IT competency amongst drivers and other staff. Recruitment of younger drivers of HGV and LGV is essential. Establishing an academy for logistics could form part of the solution for building up a skilled logistics workforce. An apprenticeship standard needs to be approved for HGV in addition to the LGV standard that is already in place. It is also important to ensure that, for example, the 25 industrial sites available in Thurrock are suitable for those logistics businesses that are looking to expand into new premises.

Expanding offshore and other energy: Offshore energy provides considerable opportunities for coastal areas, such as Harwich, with 5% of UK energy now supplied by offshore wind and 63% of UK offshore wind capacity sited off the East of England coast. Harwich offers an ideal location for offshore energy having been used as the construction port for the Gunfleet Sands wind farm. It will also benefit if Innogy's application for Harwich to be the operation and maintenance base for the Galloper Wind Farm is approved early in 2018. Brightlingsea is key centre for monitoring studies of Gunfleet Sands as well as for ferrying personnel. Harwich and Brightlingsea form part of the South East Centre for Offshore Renewable Engineering (CORE), which also includes Kent. This is one of only six such areas in the UK. The Government should provide more support to these CORE areas of strategic importance. If a new nuclear plant at Bradwell were to be approved it would establish Essex as a long-term provider of nuclear energy.

Enhancing delivery of skills: Essex needs to expand skills provision in coastal communities, as elsewhere, in order to meet demands of key sectors. Key requirements include raising attainment, particularly at A Levels; developing new models of training for creative industries dominated by self-employment; strengthening education and careers advice; developing extra-curricular learning to bridge the gap between school and technical education; and setting out clear priorities for investment in post-16 education. Sectors such as tourism, care and logistics all require both more people with qualifications as well as upskilling of existing workforce.

Expanding supply of suitable business premises: In order to address shortage of suitable workspace across Essex local authorities should look at initiatives which will give priority to allocating land for disposal to commercial workspace. Councils also need to utilise available funding options such as rent guarantees and empty space rates relief; look to pension funds and their agents to facilitate greater supply; and consider other interventions such as allocating sites specifically for start-ups.

Extend superfast broadband to all areas: Superfast Essex should deliver on its plans to reach 97% of premises by 2020 and nearly everyone by 2021. Comprehensive coverage is required by businesses, so that when, for example, a business expands and moves to a larger more suitable location, it can be assured that the broadband coverage and speed will be sufficient in its new premises.

Harnessing the potential of agri-tech: Agri-tech or agricultural technology represents the development of technology and processes that can benefit agriculture. Deployment of available technologies can bring about growth in productivity, sustainability and profitability. There is scope for coastal districts in Essex, some of which include sizeable rural areas, to derive further benefit from advances in agri-tech.

A. REVIEWING THE EVIDENCE ON CHALLENGES IN COASTAL COMMUNITIES

Challenges of coastal communities across the UK

Independent research led by Professor Steve Fothergill at Sheffield Hallam University has found that the issues affecting seasonal towns across the UK are distinct from those affecting older industrial towns in the north and midlands. This applies even though some of the outcomes related to higher unemployment, lower pay and greater levels of deprivation may be similar. Broad findings for the UK emerging from his research include:

- Higher inward migration: largely a consequence of residential preference as people choose to live in and retire to coastal towns. It is also housing driven as people are displaced into private rented accommodation in coastal towns out of more expensive rented housing in central London.
- Rising employment in some coastal towns which may be outweighed by inflow of people arising from net inward migration.
- Unemployment that is only slightly higher than the UK average, but higher hidden levels of joblessness are indicated by the larger share of those economically inactive.
- Better adaptation by some coastal towns to the historic shift to foreign holidays that has taken place since the 1970s. Regional factors come into play here, as the strength of the holiday trade in the South West and the greater prosperity of towns in the South East has helped underpin some coastal towns in those regions, compared with Wales, the North West and the East coast.

Challenges of coastal communities in Essex

The broader UK analysis finds some echoes in Essex. Analysis in this section highlights weaker economic performance, higher levels of inward migration, greater incidence of economic inactivity, lower pay and greater deprivation for some coastal districts.

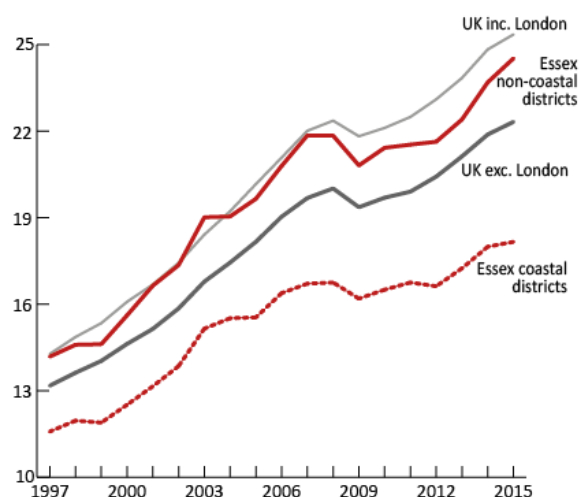
GDP per head and house prices

This is reflected in the overall weaker economic performance: nominal GVA of coastal districts in Essex has grown by 57% over nearly two decade, more slowly than the 73% in non-coastal districts in Essex (Chart 1). The rate of growth in coastal GVA per head is also slower than 70% growth in UK excluding London and 78% including London. In Essex this leaves GVA per head in 2015 of £18,160 in coastal districts trailing non-coastal GVA per head of £24,520 by 26%.

Chart 1

Nominal GVA per head

£000s, gross value added per head

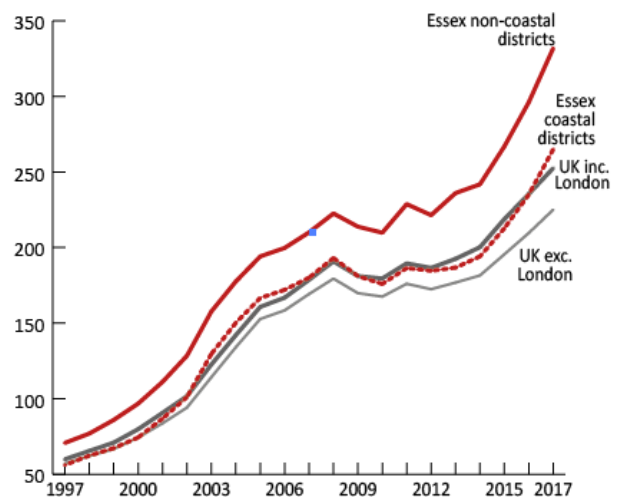


Source: ONS

Chart 2

Median house prices

£000s



Source: ONS

Median house prices in coastal districts have moved ahead of UK prices in the past year, having previously tracked them closely over the past 20 years (Chart 2).

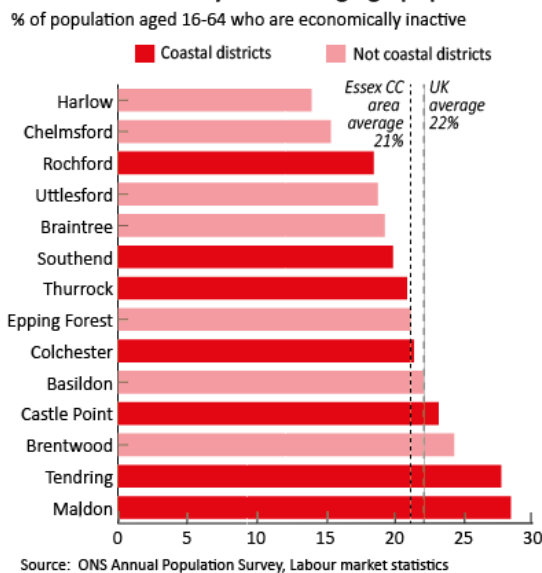
Table 1

Gross weekly pay		
All employees, 2016, £ per week		
	Number	Mean
Description	of jobs	average
	(thousand)	
Uttlesford	33	738.4
Brentwood	28	691.8
Maldon	24	671.1
Epping Forest	46	644.9
Chelmsford	69	588.5
Rochford	32	578.3
Basildon	73	573.3
Southend	73	548.9
Braintree	62	544.2
Thurrock	63	530.8
Colchester	73	519.7
Castle Point	31	509.3
Harlow	33	496.4
Tendring	48	455.5
Essex CC	550	572.7
UK	25,762	524.5

Source: ONS Annual Survey of Hours & Earnings

Chart 3

Economic inactivity in working age population



It is important to differentiate the issues that affect different coastal towns across Essex. Other independent research also undertaken by Fothergill for the South East LEP on Coastal Communities reviewed a number of coastal towns in Greater Essex, particularly those located in Tendring district council. Based on this research, coastal towns were categorised as follows (with council in brackets):

- Larger seaside towns facing substantial challenges: Clacton (Tendring)
 - Larger seaside town facing significant challenges: Southend (Southend)
 - Seaside towns that are faring reasonably well: Frinton/Walton (Tendring)
 - Port with significant socio-economic challenge: Harwich (Tendring)
 - Small place with acute difficulties: Jaywick (Tendring)
 - Smaller more prosperous communities: Brightlingsea (Tendring)
- West Mersea (Colchester), Tollesbury (Maldon), Burnham (Maldon)

Lower pay

Based on gross weekly pay of employees five of the seven districts with the lowest mean average pay are coastal districts (Table 1). Lowest is Tendring at £455, with Castle Point, Colchester and Thurrock between £510 to £530 and Southend £549. Mean weekly gross pay is above the Essex average of £573 in Maldon and Rochford.

Higher inactivity and unemployment

Employment levels are generally high in Essex at 76% of the 16-64 age group for the Essex county council area, slightly higher than 74% for the UK. Employment levels in coastal districts are generally lower with Tendring and Maldon the only two districts in Essex to have less than 70% employment amongst the 16-64 age range, 68% and 67% respectively (Chart 3).

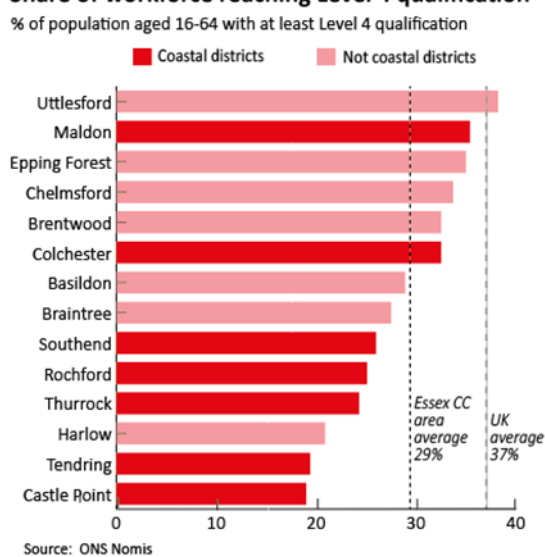
Table 2

Inactivity and unemployment in Greater Essex					
% of total workforce, year to March 2017			Economic		Claimant Count
	Emplymt.	inactivity	Unempt		
	16-64	16-64			
	UK	74.0	22.2	4.7	1.9
Essex Haven	Tendring	68.5	27.7	5.5	2.8
Gateway	Braintree	78.0	19.3	3.6	1.1
	Colchester	75.9	21.4	4.0	1.2
Heart of Essex	Maldon	67.2	28.4	3.9	0.9
	Chelmsford	82.7	15.4	3.0	1.1
	Brentwood	72.3	24.3	3.4	0.8
West Essex	Epping Forest	76.8	21.2	3.7	1.2
	Uttlesford*	81.2	18.8	2.1	0.5
	Harlow	83.3	14.0	4.0	1.8
South Essex	Thurrock	74.8	20.9	5.0	2.0
	Rochford*	79.2	18.5	2.8	0.8
	Basildon*	73.9	22.1	4.9	1.8
	Southend	76.0	19.9	4.6	2.0
	Castle Point*	75.4	23.2	3.7	1.3
	Essex CC	76.5	20.8	3.8	1.3

*Essex Thames Gateway
Source: Annual Population Survey, ONS Labour market statistics

Chart 4

Share of workforce reaching Level 4 qualification



Economic inactivity is the inverse of employment and varies across Essex. It is highest in Tendring and Maldon at around 28%, well above the Essex average of 21% and at about half this level 14% in non-coastal districts Chelmsford and Harlow (Table 2). The difference in the share of economic inactivity across districts in Essex is about 14%, pointing to a higher level of hidden unemployment in some coastal communities. Unemployment is highest in Tendring at 5.5% and lowest in Uttlesford at 2.1%, a range of just 3.4%: the difference in unemployment rates therefore explain only a quarter of the 14% difference in economic inactivity.

Weaker base of qualifications and skills

Although the overall share of people reaching level 4 qualification across Essex County Council area has increased to 29%, this share still falls well behind the 37% average for the UK. Five of the six lowest shares are found in coastal districts (Chart 4). Castle Point and Tendring record the lowest share of local population reaching Level 4, both at 19%, while the share reaching Level 4 in Thurrock, Rochford and Southend is in the 24% to 26% range. Harlow is the single non-coastal district amongst the fewest in this category. Colchester and Maldon were the only coastal districts to have a higher share reaching level 4 than the Essex CC average at 33% and 35%, respectively.

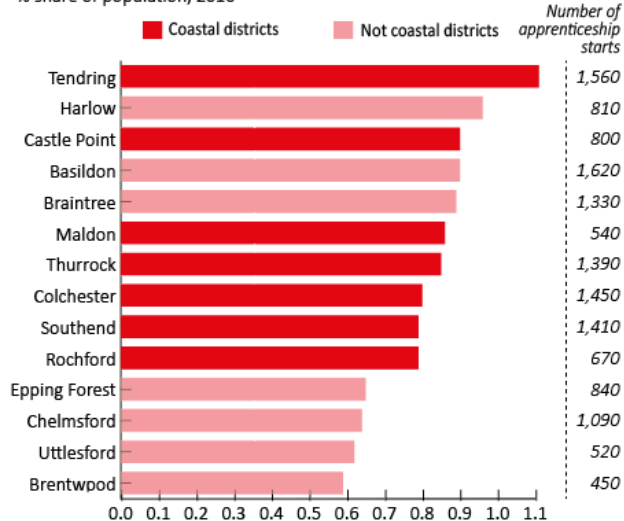
Across the UK, counties with a larger share of people with higher level qualifications also tend to attract more jobs in higher level occupations. The picture in Essex is more uneven. In Castle Point and Southend the gap between the two is particularly wide with many more people working in higher level occupations relative to the share reaching Level 4 (Table 3). Tendring and Thurrock show up as having both a smaller proportion of people with stronger qualifications as well as a lower share in higher level occupations (Table 3). In Colchester the share of those with at least Level 4 qualification is closer to matching the share of those working in high level occupations.

Take up of apprenticeships is highest in Tendring: 1,560 starts in 2015/16, equivalent to 1.1% of the local population, the highest in Greater Essex (Chart 5). Castle Point was the next coastal district

Chart 5

Apprentice starts

% share of population, 2016



Source: Department for Education, Skills Funding Agency

Table 3

Higher level occupational employment and qualifications			
% share of population, aged 16-64			
2015	% with NVQ4+	Occupation level 1-3	Difference
<i>Essex Haven Gateway</i>			
Tendring	19.4	32.2	13
Braintree	27.5	35.3	8
Colchester	32.5	39.2	7
<i>Heart of Essex</i>			
Maldon	35.4	50.1	15
Chelmsford	33.7	48.9	15
Brentwood	32.5	51.6	19
<i>West Essex</i>			
Epping Forest	35.0	48.8	14
Uttlesford	38.2	42.3	4
Harlow	20.9	40.5	20
<i>South Essex</i>			
Thurrock	24.3	34.4	10
Rochford	25.1	38.0	13
Basildon	28.9	44.9	16
Southend	26.0	46.1	20
Castle Point	19.0	48.6	30
<i>Essex CC</i>			
Essex CC	29.2	43.0	14
UK	36.9	44.0	7

Source: ONS Nomis

with apprenticeships making up 0.9% of local population. Other coastal districts were in the mid-range with apprenticeship starts around 0.8% of local population.

Average attainment at A Levels in core state-funded schools in coastal districts (which does not include grammar schools) is below average with only four out of 25 such schools in coastal districts achieving an average grade in 2015/16 that was at least in line with the average for England as a whole.

Trends in demographics, commuting and internal migration

Three key points impacting on coastal districts can be picked out of trends in demographics, commuting patterns and internal migration flows:

Firstly, coastal districts tend to have a larger relative share of the population aged 65 and over. The four local authorities with the highest share of the 65+ age range are all coastal (Chart 6). Most prominent is Tendring where 29% are 65+, followed by Castle Point 25%, Maldon 24% and Rochford 23%. These are all higher than the Greater Essex average of 19.5%. Thurrock has the smallest share with just 14% aged 65+. A 2013 survey by Liverpool Victoria placed Clacton as the fifth most popular coastal retirement town in England with 32% of residents claiming state pensions.

Secondly, net inward migration is adding to the older age group in some coastal authorities, particularly Tendring. Over the five years to June 2016 there was a net inflow of 1,490 people in the 65+ age range and an even larger net inflow of 2,970 people in the 45-64 age range (Table 4). Other coastal districts including Southend, Castle Point, Maldon and Colchester also have a net inflow in the 65+ stage but the scale of the inflow is less. By contrast, significant net outward flows of people between 2011 and 2016 in both the 65+ and 45-65 age ranges show up in the internal migration figures for Thurrock; which points to fewer people resident in this authority in older age groups.

Table 4

Internal migration: inflows and outflows to local authorities					-----net flow by age-----				
July 2011-June 2016, aggregated flows over five years					0-14	15-24	25-44	45-64	65+
		Inflow	Outflow	Net flow					
Essex Haven Gateway	Tendring	33451	25357	8094	1290	-1400	1020	2970	1490
	Colchester	50417	46024	4394	1050	1170	1590	540	180
	Braintree	34541	33261	1280	90	-1170	1050	390	720
Heart of Essex	Brentwood	21467	19623	1844	730	-440	1550	-290	60
	Maldon	15618	13889	1730	460	-770	460	680	370
	Chelmsford	40738	39918	820	750	-880	1020	-940	40
West Essex	Uttlesford	25949	21456	4493	1500	-1130	2290	450	380
	Epping Forest	37738	35564	2174	510	-290	2280	-190	120
	Harlow	17965	19056	-1092	10	-230	360	-440	-240
South Essex	Southend	40727	37839	2888	90	-190	1350	370	660
	Basildon*	39366	36706	2660	680	-490	2470	-380	-290
	Rochford*	20622	18321	2301	990	-510	1160	300	30
	Castle Point*	20337	18089	2249	960	-560	300	390	400
	Thurrock	34832	33646	1185	770	-460	1830	-680	-470

*Essex Thames Gateway
Source: ONS Internal migration, England and Wales (Statistical Bulletin)

Thirdly, coastal districts tend to have far more people commuting out of the district area to travel to work, than they have commuting into the district. So, the four local authorities with the lowest net inflow of commuters are all coastal districts (Chart 7). Castle Point has only 32 people travelling into the authority to work for every 100 commuting out. The other authorities with the lowest net inflow of commuters are Tendring 39, Rochford 43, and Maldon 47. This strong net outflow doesn't apply to all coastal districts with Colchester having 95 people commuting in for every 100 commuting out.

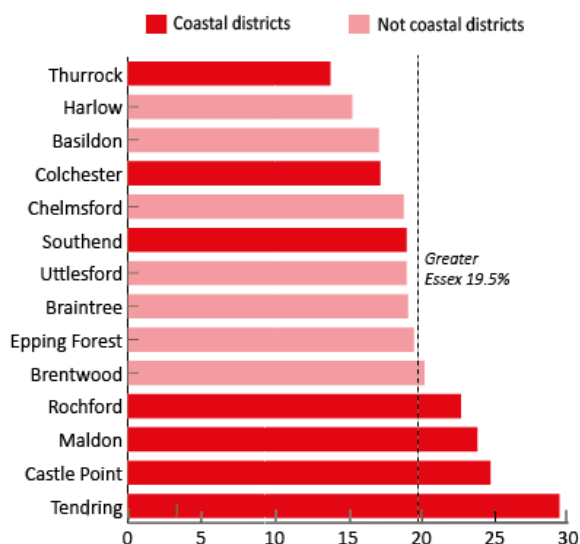
Fourthly, employment is not keeping up with levels of inward migration for those of working age:

- In Tendring employment increased by 3% or some 1,200 between 2009 and 2015, but inward migration between 2011 and 2016 was three times higher, nearly 4,000 for those aged 25-64 group, as well as a net 1,490 for those aged over 65.
- In Maldon for the same periods employment declined slightly by nearly 100, while net inward migration for those aged 25-64 was 1,120 and 370 for 65+.
- In Southend employment declined by 700 while there was a net inflow of 1720 in the 25-64 group as well as 660 amongst those aged 65+.

Chart 6

Demographic pressures

% share of local population aged 65+ in 2015

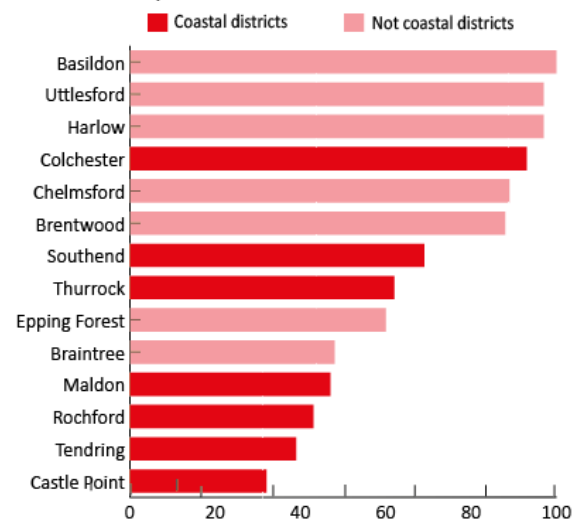


Source: ONS population estimates

Chart 7

Local commuting flows

Inflow of commuters as % share of outgoing commuters for each authority



Source: ONS population estimates

Strong record in start-ups

Greater Essex generally has a good record in start-ups of new enterprises: Relative to each £1bn of GVA in 2015 total start-ups in Greater Essex totalled 254, compared with 217 for the UK. These figures are available only at the corridor or unitary level. Start-ups for coastal districts such as Southend and Thurrock were higher still at 313 and 280. In Essex Thames Gateway which mostly consists of coastal districts there were 254. Essex Haven Gateway has the lowest start up rate in the county, at 220 start-ups per £1bn of GVA, but this is still ahead of the UK average.

Uneven spread of deprivation

Measures of deprivation available at the local area level provide a picture of the spread of deprivation across each local authority. The Index of Multiple Deprivation divides local areas into deciles for the purpose of analysis. In Greater Essex five of the six local authorities that have the largest share of local areas in the two most deprived deciles are in coastal areas (Chart 8). Tendring has the highest share with 28% of its local areas in the most deprived two deciles; it is followed by Southend 24%, Thurrock 13%, Colchester 10% and Thurrock 9%. Not all coastal authorities feature in areas with high levels of deprivation: neither Rochford nor Maldon have any local areas in the most deprived two deciles.

The overall picture needs to be balanced by taking account of the share of local areas in the least deprived two deciles. While Tendring has no local areas at all in this category, Colchester has 21% and Southend 18%, pointing to significant variation in levels of deprivation across these two authorities. This variation also applies to some extent in Thurrock and Castle Point. Rochford has nearly half of its local areas in the two least deprived deciles, Castle Point 23% and Maldon 18%.

A high share of local areas in the two most deprived deciles is strongly linked to the rankings for the overall Index of Mass Deprivation as well as the share of children in households receiving out of work benefits. Five of the seven authorities with higher levels of deprivation on these criteria are coastal districts (Table 5): the same five as appear in Chart 8 with a larger share of local areas in the two most deprived deciles.

Chart 8

Spread of deprivation

% share of local areas that are most and least deprived in each authority 2015

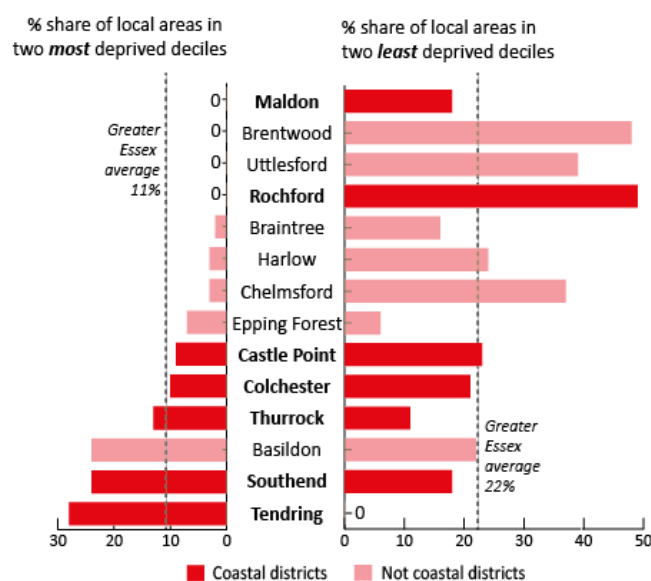


Table 5

Index of Multiple Deprivation (IMD) & children in out-of-work households

	Index of mass deprivation*	Children in out of work households as % share of all local children
Uttlesford	297	5%
Brentwood	294	6%
Rochford	285	8%
Chelmsford	261	9%
Maldon	204	9%
Epping Forest	199	10%
Braintree	197	10%
Castle Point	187	12%
Colchester	185	12%
Basildon	113	16%
Thurrock	111	16%
Southend	105	15%
Harlow	71	16%
Tendring	49	20%

*Average ranking of 326 local authority districts:

326 least deprived - 1 most deprived
Source: Dept. of Communities & Local Govt., Dept. of Work & Pensions

An ONS report profiling seaside deprivation in England found that, after Blackpool, Clacton was ranked the second most deprived larger seaside destination out of 31 centres. Southend was ranked 24th in this ranking, still slightly more deprived than the average for England. Out of 26 mid-sized seaside destinations, Harwich was rated the 10th most deprived.

Seaside tourism still important

Seaside tourism remains important to Essex Seaside tourism still plays an important role for some coastal communities, particularly Southend, Colchester and Tendring. While coastal resorts in Essex and the South East of England no longer attract large numbers of people for their main summer holiday, many people still take short breaks or day trips.

But trips to Essex have been in decline Despite its importance and potential, the number of trips to Essex fell between 2006 and 2016. Visit Britain's Great Britain Tourism Survey (GBTS) shows that visits to Greater Essex dropped by 24% between the 2006-08 period and the 2014-16 period (Table 6). During this period all trips in England were unchanged, although this was driven by 18% growth in trips to London. Essex share of the English market for trips has dropped from 1.4% to 1.0% over the period.

The most significant destinations in Essex are coastal districts Tendring, Southend and Colchester. Overall coastal districts in Essex account for just over a half of overnight trips to the county. Southend is the only major destination in Essex to have gone against the downward trend, with a 17% increase in trips during the past decade. Southend Pier is one of the UK's major paid-for tourist sites, attracting around 400,000 visitors a year with the aim of reaching one million visitors.

Economic importance Data from Destination Research derived from the GB Tourism Survey indicates that a total of 60,000 people in Essex are employed in the tourist industry. The largest presence of over 8,000 people is in both Southend and Tendring, with 6,400 in Colchester and over 3,000 in each of Thurrock and Maldon (Table 7). Availability of broadband, discussed below, is important to sustaining tourism with visitors looking for connectivity in the places that they are visiting.

Table 6

Total trips to Essex			
Thousands, averaged over three years			
	2006-08	2014-16	% change
Tendring	348	278	-20
Southend	213	249	17
Colchester	531	248	-53
Chelmsford	285	237	-17
Uttlesford	169	132	-22
Epping Forest	103	119	16
Basildon	153	112	-27
Braintree	146	109	-25
Harlow	80	71	-11
Maldon	81	66	-18
Brentwood	75	61	-19
Thurrock	111	54	-52
Rochford	28	39	38
Castle Point	21	17	-17
Essex	2344	1792	-24
England	98265	98228	0

Source: GB Tourism Survey

Table 7

Economic impact of tourism		
2016	Total	Total
	visitor	employment
	spending	
	£m	
Southend	316	8980
Tendring	278	8329
Colchester	263	6410
Maldon	161	3490
Thurrock	133	3897
Other districts	1159	29757
Essex total	2310	60863

Source: Destinationresearch

In Clacton the recent restoration of five kilometres of coastline, involving 23 new beaches in separate bays, was a central part of the £36m Sea Defence Project completed in 2015. In seeking to protect 3,000 homes for 100 years, the investment is also aimed at enhancing seaside tourism in Tendring. Stretches of a coastal path already exist in Essex, but Essex Highways are planning a complete route for a coastal path in conjunction with Natural England. When concluded this will provide an additional opportunity for promoting tourism.

Superfast broadband coverage improved but still deficient

Coverage of superfast broadband has improved steadily in recent years. The latest detailed dataset in 2016 showed 83% coverage for Greater Essex to be behind the UK figure of 88% (Table 8). The four coastal districts in South Essex have some of the best coverage in the county, mostly in excess of 90% coverage. However coverage in Tendring and Maldon, at 79% and 71% respectively, is much less comprehensive.

During 2017 UK coverage for superfast broadband has risen to 94% so coverage in Essex will also have risen. Even so, there is further to go: SuperfastEssex, part of the Superfast Britain programme, aims to improved broadband coverage so that by 2020 97% of the county has access to fibre broadband, with the ambition ‘to reach nearly everyone by the end of 2021’. The programme is also seeking to ensure that a minimum of 2mb/s download speed is available across the county. Despite sustained progress in the installation of superfast broadband, significant blank areas remain: so, for 10 wards in Clacton and Harwich area and seven in Maldon, fewer than half the properties can download at more than 10mb/s.

Table 8

Superfast broadband availability			
% of premises, 2016	unable to download at		
	SFBB availability	2Mbit/s	10Mbit/s
Harlow	97	0	1
Castle Point	97	0	1
Southend-on-Sea	95	0	0
Thurrock	92	0	4
Basilidon	91	0	3
Rochford	89	0	3
Chelmsford	86	1	4
Brentwood	85	1	6
Colchester	84	1	9
Epping Forest	82	1	4
Tendring	79	1	7
Maldon	71	1	11
Braintree	68	1	8
Uttlesford	60	2	18
Essex County	83	1	6
UK	88	3	5
Source: Broadband Delivery UK			

Managing the shoreline and coastal waters

The coastal shoreline is at the forefront of coastal issues with the ongoing containment and management of coastal erosion and flood defences. Key initiatives relevant to Essex in the management of shoreline and coastal sea waters for Greater Essex include:

- *Essex and South Suffolk Shoreline Management Plan (SMP)*, which was agreed in 2010. An SMP describes how a stretch of shoreline could be managed to address flood and/or erosion during the period to 2025. Stretches of coast are divided up into manageable sections, for each of which there will be a policy focused on some combination of no active intervention, holding the line, some managed realignment or advancing the line. As highlighted above, a major local project in Essex has been the £36m sea defence project in the Clacton area, involving a recharge of sand and stones and the construction of fish tail groynes. The project is intended to contribute to a renaissance of tourism in the area.
- *South East Marine Plan (SEMP)* Under the auspices of the Marine Management Organisation, which licenses, regulates and plans marine activities in the seas around England, the SEMP is intended to secure sustainable development of inshore coastal waters. This involves a balance between development of fishing and aquaculture; protection of the diverse marine habitat; and fostering economic development, including essential activities such as dredging to ensure access to the ports. Beneficial use of dredged material from port and marine activities can benefit coastal management by prolonging the life of sea defences and reducing the ongoing maintenance costs when it is deposited appropriately.

The Essex Coastal Forum was established in 2011 in response to the development of the Essex and South Suffolk SMP, with a remit to ensure the incorporation of that Plan into a wider coastal agenda. By establishing a partnership involving a wide range of organisations with a stake in coastal issues it seeks to establish an integrated approach to managing coastal issues across Essex, ensuring consistent decision making.

Coastal regeneration government initiatives

In addition to the Essex Coastal Forum, the SELEP Coastal Communities Group has a regional role in determining priorities on coastal issues to input to the SELEP Strategic Economic Plan.

Beyond such initiatives to revive coastal communities led by local authorities and regional groups, Government is undertaking other initiatives focused on seaside regeneration:

Coastal Community Teams (CCTs) Over 100 local CCTs have been established in total, including eight in Essex, with a remit to revive coastal towns. CCTs bring together local businesses, council and local people. The eight in Greater Essex include Jaywick, Harwich and Dovercourt, Canvey Island, Maldon and Blackwater, River Crouch, Leigh-on-Sea, Shoeburyness and Southend.

There is difference in scope for these CCT projects from major redevelopment to local improvements such as street signage. The Jaywick CCT, for example, represents a wholesale redevelopment, involving the purchase of former business units, contaminated sites and vacant residential units, leading to clearance and rebuild. The new development will comprise of mixed tenure homes (high quality flood resistant units) with the aim of relocating residents from substandard, poor quality and flood susceptible properties. By improving the standard of homes and stimulating private investment the project aims to regenerate Jaywick and to deliver economic sustainability.

Coastal Communities Fund CCTs have also been given a role in seaside regeneration with the opportunity to apply for funds from the Coastal Communities Fund. Agreement amongst CCTs in an area is helpful when submitting application for funding from The Coastal Communities Fund as it demonstrates that the project has the wider support of the community and fits with the CCTs' own economic plans. Overall the CCF can allocate up to £209m from its launch in 2012 up to 2020, with the current round providing a fund of £40m. A Coastal Revival Fund of £3m is also available for projects that support or restore local heritage and facilities benefitting the wider community.

Analysis of CCF spending indicates that four projects in Essex are largely focused on improving the tourism offer. While tourism is also an important feature of CCF in Suffolk and Kent projects there also have a broader focus: three of the seven projects in Suffolk involve enhancement of skills, while three of the six in Kent include development of business premises.

Challenges for Coastal Districts in Greater Essex								
		Tendring	Colchester	Maldon	Rochford	Southend	Castle Point	Thurrock
Inactivity	High economic inactivity > 25% of 16-64 age group	X		X				
	Unemployment > 5% of 16+ age group	X				X		X
Pay	Gross mean average pay < £540 per week	X	X				X	X
Demographics	Larger retired population > 20% aged 65+ of total population	X		X	X		X	
Commuting flows	Inflow of commuters < 50% of outflow	X		X	X		X	
Qualifications	Level 4 and above < 27% of 16-64 age group	X			X	X	X	X
Quality of life	Index of multiple deprivation <120th most deprived out of 326	X				X		X
	> 10% of local areas in two most deprived deciles	X				X		X
	Children in households claiming out-of-work benefits > 15%*	X				X		X
Broadband	Superfast availability <85% of all households	X	X	X				
Tourism	Domestic overnight trips < 70k per year			X	X		X	X

Table 9

Table 10

Coastal Indicators Summary											
		Economically inactive 16-64 % share	Mean average gross pay £ per week	Qualificatns Level 4+ 16-64 % share	Apprentice starts % share of local popn.	Demographic pressure Population Age 65+ % share	Local Commuting flows: Inflow as % share of outflow	Local areas in 2 most deprived deciles % share	Children in out-of-work households as % share of all local children	Domestic overnight trips Thousands average over 3 years	Start-ups 2010-15 relative to GVA in 2015
<i>Essex</i>	Tendring	28	456	19	1.11	29	39	28	20	249	}
<i>Haven</i>	Braintree	19	544	28	0.89	19	48	2	10	132	}
<i>Gateway</i>	Colchester	21	520	33	0.80	17	93	10	12	250	}
<i>Heart of Essex</i>	Maldon	28	671	35	0.86	24	47	0	9	61	}
	Chelmsford	15	589	34	0.64	19	89	3	9	212	}
	Brentwood	24	692	33	0.59	20	88	0	6	69	}
<i>West Essex</i>	Epping Forest	21	645	35	0.65	20	60	7	10	107	}
	Uttlesford	19	738	38	0.62	19	97	0	5	136	}
	Harlow	14	496	21	0.96	15	97	3	16	79	}
<i>South Essex</i>	Southend	20	549	26	0.79	19	69	24	15	269	313
	Thurrock	21	531	24	0.80	14	62	13	16	57	280
	Rochford	19	578	25	0.79	23	43	0	8	44	}
	Basildon	22	573	29	0.90	17	100	24	16	116	}
	Castle Point	23	509	19	0.90	25	32	9	12	16	}
	Greater Essex	21*	573*	29*	0.82	19	---	11	13	---	254
	UK	22	525	37	0.92**	18	---	20	15	---	217
*Essex County council area, **England											
Ranking of indicators											
<i>Essex</i>	Tendring	13	14	13	1	14	13	14	14=	3	
<i>Haven</i>	Braintree	5	9	8	5	8	10	5	6=	6	
<i>Gateway</i>	Colchester	5	11	5=	8	4	4	10	8=	2	
<i>Heart of Essex</i>	Maldon	14	3	1	6	12	11	1=	4=	11	
	Chelmsford	2	5	4	12	5	5	7	4=	4	
	Brentwood	12	2	5=	14	10	6	1=	2	10	
<i>West Essex</i>	Epping Forest	8	4	3	11	9	9	8	6=	8	
	Uttlesford	3	1	2	13	6=	2	1=	1	5	
	Harlow	1	13	12	2	2	3	6	11=	9	
<i>South Essex</i>	Southend	6	8	9	9	6=	7	13	10	1	
	Thurrock	7	10	11	7	1	8	11	11=	12	
	Rochford	4	6	10	10	11	12	1=	3	13	
	Basildon	10	7	7	4	3	1	12	11=	7	
	Castle Point	11	12	14	3	13	14	9	8=	14	

B. DEALING WITH THE CHALLENGES OF COASTAL DISTRICTS

The analysis and ranking of criteria for coastal districts points to variation in the extent of challenges faced by different authorities.

Regenerating coastal communities: Regenerating coastal communities involves a broad mix of initiatives, often small scale. For tourism this should include improving the offer to visitors covering culture, special events, retail and local accommodation. Investment in good transport links with nearby urban centres and the region generally is vital to improved connectivity. Upgrading of skills is also key given the shortfall in many coastal districts and this will be crucial to underpinning expansion of some sectors such as logistics and care. Individual communities may also look to target particular growth sectors. Expanding availability of suitable business premises is crucial to development of local business as well as ensuring access to superfast broadband for businesses and residents. Initiatives need to connect with vulnerable households and address problems associated with deprivation.

The Essex Coastal Forum was established in 2011 in response to the development of the Essex and South Suffolk Shoreline Management Plan, with a remit to ensure the incorporation of that Plan into a wider coastal agenda. Both the Essex Coastal Forum and the SELEP Coastal Communities Group have a county wide or regional role in addressing coastal issues.

There is scope to review the current remit of these groups. It would be useful to consider how a county-wide grouping could take a more proactive approach to managing coastal issues across Essex building on the partnership approach that is already established. The issues that could provide a focus for this grouping include shoreline management, developing seaside tourism, and promoting heritage and culture. It would also help to maximize the impact of the Coastal Community Teams and also for any funding secured from the Coastal Communities Fund.

Developing seaside tourism: Apart from Southend, where visitor numbers have been rising, the market for tourism has been waning over the past decade. Opportunities exist to promote tourism, recreation, history and culture and landscape in Essex:

- Visit Essex should continue to work with local authorities and other local partners, reviewing additional steps can be taken to promote visits to coastal communities.
- Establishment of a coastal path would provide an opportunity for seaside tourism and coastal regeneration. Essex Highways need to continue to develop a plan for a coastal path in Essex working in conjunction with Natural England which is determining the route of an England Coast Path.
- Develop cultural events that promote heritage and arts, and expand marine recreation such as sailing, angling and water sports.

Tendring's 'Resorting to the Coast', funded by Essex County Council and the Heritage Lottery Fund, is an example of a coastal heritage initiative. The project, running to 2019, enables people to rediscover and celebrate the history of local seaside resorts through a range of free events including training courses, a programme in 10 schools, and two seaside conferences to showcase British seaside heritage focusing on Tendring. Depending on the outcome, this type of initiative could be adopted elsewhere in Essex. Southend has improved its offer by coupling tourism with development of culture, leisure and retail activities. It has a broad ranging tourism strategy 'Destination Southend-on-Sea', which sets out a vision across the borough over the decade to 2027.

Developing transport links: A number of transport schemes are high priority because of their linkage with supporting the economy of coastal districts. Key developments required for the Essex ports include:

- *Lower Thames Crossing* and accompanying new roads and junctions to link the crossing with Tilbury and London Gateway ports, as well as to the A13, A127 and M25.
- A13 corridor linking South Essex to the M25 and the capital. £300m is being invested by local authorities to improve and widen the A13.
- A120 linking Harwich port and local Tendring and Colchester economies with Stansted airport. Improvement required at the eastern end which is not dualled to reduce congestion into Harwich.
- A133 road into Clacton also needs investment to relieve congestion during summer months.

Expanding provision of care and assisted living along with healthcare: Care is a major growth sector because of the high proportion of retired people aged 65+ resident in coastal areas, particularly Tendring, Castle Point, Maldon and Rochford. Investment in technological advancements and innovation would enable more independence and less direct support for some people. Investment that enables more independent living generates a return in state spend by enabling people to live in their homes for longer and therefore less dependent on state support. Coastal authorities in Essex are well placed to capitalise on this opportunity. Alongside such investment there is a requirement to improve the perception of care as an industry. The care sector is more prevalent in coastal districts because of the demographic profile. Demand for care is set to grow so more people with appropriate skills will be required. Gaining accreditation and upskilling provide an opportunity for people to improve employability and earning potential.

Exploiting the potential of ports and logistics: Ports and logistics are important along the coast particularly for South Essex and Tendring. The development and expansion of the Port of Tilbury and London Gateway are contributing to the revival of the local economy, particularly in Thurrock. Tilbury 2 involves the establishment of a new port terminal and associated facilities on land that previously formed part of the Tilbury power station site. London Gateway combines the UK's most advanced deep sea port with one of Europe's largest logistics parks. While the proposed Bathside Bay development at Harwich has the potential to create a deep sea container port, the high level of container capacity in the region means that it is unlikely to be developed for the foreseeable future. However, Harwich does have significant potential for growth in offshore energy as set out in the next section.

Key drivers for the future development of logistics, particularly in South Essex, include:

- Effective deployment of new technologies, with mobile, location-based technologies and hand-held computer systems requiring greater IT competency amongst drivers and other staff.
- Recruitment of younger drivers of HGV and LGV, including more women, to replace ageing male workforce. Establishing an Institute of Technology in transport and logistics could form part of the solution to building up a skilled logistics workforce. While an apprenticeship standard has been developed for LGV, it has yet to be approved for HGV.
- Ensuring that the 25 industrial sites available in Thurrock are suitable for those logistics businesses that are looking to expand into new premises.

Expanding offshore and other energy:

Offshore energy Considerable opportunities stem from offshore energy in places such as Harwich, with 5% of UK energy now supplied by offshore wind and 63% of UK offshore wind capacity sited off the East of England coast. The Energy Sector Review by Nautilus Associates noted that the energy and low carbon sector employs over 8,000 people in Essex in some 1,500 mainly smaller businesses.

Harwich, according to the Nautilus Associates report, offers an ideal location to support assembly, installation, operations and maintenance (O&M). Harwich was used as the construction port for the Gunfleet Sands and wind farm. It will also benefit if Innogy's application for Harwich to be the O&M base for the Galloper Wind Farm is approved early in 2018. Supplementing the role of Harwich, boats operating out of Brightlingsea carry out monitoring surveys and continuing environmental studies on Gunfleet Sands as well as ferrying personnel.

Harwich and Brightlingsea form part of the South East Centre for Offshore Renewable Engineering (CORE), which also includes Kent. This is one of only six areas in the UK officially designated by Government as areas of England best able to service the offshore wind industry. The Government should provide more impetus to these CORE areas of strategic importance. This would help to promote the role of Essex ports in supplying specialist logistics, assembly and construction services to the offshore wind industry.

Nuclear energy Construction of a new nuclear reactor at Bradwell is planned in a joint venture between EDF Energy and China General Nuclear. The intention is to locate the new plant next to the existing Magnox site. The proposal has gone through to the second of four phases of its official assessment by regulators, with the total process if it reaches approval likely to take four years.

Enhancing delivery of skills in Greater Essex: Essex needs to expand skills provision in the local economy in order to meet present and future demands of key sectors, including those with a strong presence in coastal districts such as construction and infrastructure, logistics, care, health, manufacturing, IT digital and creative industries. Key requirements for coastal districts include:

- *Raise attainment at GCSEs and A Levels* Average attainment at A Levels in core state-funded schools is poor with only four out of 25 schools in coastal districts achieving attainment that is at least in line with the average for England.
- *Strengthen education and careers advice* Advice and guidance on education and career options post-16 should be strengthened with greater coordination across agencies involved. Schools need to establish stronger links with the FE sector so that 16 year olds can make more informed choices about the range of technical and professional options available in addition to A-Levels.
- *Develop extra-curricular learning to bridge the gap between school and technical education* Providing funding so that more school students and young people can be involved, for example, in extra-curricular learning at the weekend. This would enable students to find out more about sectors, such as logistics, to improve their understanding of those sectors and spark motivation that could lead to a career choice.
- *New models for training and apprenticeships for self-employed* New models of training should include provision for people entering professions where self-employment is the main career option and therefore formal in-work training options are currently limited.
- *Set out clear priorities for action and investment in post-16 education* Essex needs to agree clear priorities on how it believes the skills agenda can best be delivered, including priorities

for 16-19 year olds, for apprenticeships and for adult education. This will help to ensure that both local and national sources of funding can be channelled into areas which are most in need of resources.

- *Improvement in tourist-related customer service skills* This would enhance the visitor experience and should therefore encourage repeat visits.
- *Approving new Institutes of Technology in Essex*: Investment in skills in Essex needs to be a priority for Government. Serious consideration should be given to expressions of interest in new Institutes of Technology proposed in three sectors in Essex: transport and logistics; mechanical engineering and construction; and advanced engineering linked to rail and construction. The Institute for transport and logistics is being proposed by South Essex College of Further and Higher Education in partnership with DP World, Port of Tilbury and Stobart Group.

Expanding supply of suitable business premises: A shortage of suitable business premises in coastal areas and across Essex is an emerging theme of recent research into factors constraining businesses. In The Essex Business Survey of 2014, 17% of businesses surveyed said shortage of premises was a constraint on expansion. The Commission set out local recommendations for Essex in its working paper 'Addressing the scarcity of commercial workspace in Greater Essex' which would apply in coastal districts. The public sector has a crucial role to play with regard to:

- *Disposal of public sector land*, when allocation of land to commercial workspace should be a key consideration.
- *Securing increased allocation to commercial workspace* in Local Plans by strengthening the role of district authorities in the monitoring and delivery of sites, so that such sites aren't allocated solely to residential by default.
- *Utilising available funding options* such as rent guarantees and empty space rates relief; interest-free loans for start-ups; gifting or underwriting land for new space; and direct funding of new sites to kick start development.
- *Identifying pension funds which own workspace and their lead agents* to facilitate greater supply of business premises.
- *Other interventions* such as identifying opportunities for development of grow-on space: improving infrastructure, planning frameworks for new communities; and allocating sites for specific use by start-ups.

Additional factors that may affect the supply of available land in coastal districts include flood risk, extent of green belt and agricultural land use.

Extend high speed broadband: Superfast Essex need to deliver on its plans to reach 97% of premises by 2020 and nearly everyone by 2021. Comprehensive coverage is required by businesses, so that when, for example, a business expands and moves to a larger more suitable location, it can be assured that the broadband coverage and speed will be sufficient.

Harnessing the potential of agri-tech: Agri-tech or agricultural technology represent the development of technology and processes that can benefit agriculture. Deployment of available technologies can bring about growth in productivity, sustainability and profitability. Coastal districts in Essex, some of which include sizeable rural districts, are benefitting from advances in agri-tech. Agri-tech strategy involves:

- Systematic analysis through use of unmanned aerial systems; diagnostics tools to identify endemic diseases in livestock; and Data to help farmers in decisions about planting choices.
- Precision farming and engineering, in which agriculture draws on robotics to drive tractors, kill weeds with lasers to target use of chemicals, pick and grade strawberries, and plant seeds.

Agri-tech represents an increasing share of agricultural production and nationally employs over half a million people.

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