

Curriculum 2030 Research

**A report for EKC Group
by Steve Matthews and Dr Jonathan Pratt**

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Contents

	Executive Summary	3
1.	Introduction	7
	1.1 Background	7
	1.2 Methodology	7
	1.3 Report Structure	8
2.	Economic Needs Analysis	9
	2.1 Business Profile	10
	2.2 The East Kent Labour Market	12
	2.3 Employment by Sector and Occupation	14
	2.4 Employment in KMEP Key Sectors	17
	2.5 Trends in Employment and Productivity	19
	2.6 Forecast Employment and Skills Needs	21
	2.7 Local Stakeholder Views on Economic Needs	25
3.	Community Needs Analysis	28
	3.1 Community Profile	29
	3.2 Unemployment & Economic Inactivity	32
	3.3 Social Needs	33
	3.4 Adult Skills and Qualifications	35
	3.5 Young People	37
	3.6 Kent's Strategy for Children and Young People with Special Educational Needs and Disabilities 2021-2024	39
	3.7 Local Stakeholder Views on Community Needs	41
4.	Key Conclusions	42
	Annex 1: Summary of Individual Local Authority Positions and Priorities	43
	Annex 2: KMEP Key Sector v Sector Subject Area Matrix	56

Executive Summary

Introduction

EKC Group is taking forward an important strategic project called 'Curriculum 2030', which, with the acquisition of Ashford College and Spring Lane animal management and horticulture training centre now completed, will set the strategy for the Group's future curriculum. Curriculum 2030 aims to ensure that the Group's provision addresses the economic and community needs of East Kent¹. This report has been commissioned to support the project by providing an analysis of East Kent's skills needs from an economic and community perspective.

Economic Needs Analysis

Business profile: in common with the rest of Kent, 90% of East Kent businesses employ 9 or fewer people, but these micro-businesses account for just 31% of employment, whilst businesses with 50 or more employees account for nearly half (46%).

The East Kent Labour Market: East Kent is a low-wage, low-productivity economy. Job density is comparable with Kent and Medway and the SELEP area, but significantly below that for Great Britain. This suggests a need to stimulate growth of the economy and employment by helping businesses to start up and scale up.

Employment by sector and occupation: Education, health and retail are the largest sectors in terms of employment, accounting for 37% of jobs. In terms of business enterprises, construction and the professional services sector are the largest, highlighting the prominence of micro and small businesses in both sectors. Compared with GB as a whole, education, retail, agriculture and motor trades (sale and repair of vehicles) are also *relative* strengths in terms of employment. There is also lower percentage of people in professional occupations than across Kent & Medway as a whole, and slightly more in skilled trades and caring occupations. Construction, Property and Transport & Storage sectors are the highest productivity sectors.

Employment by sector²: the largest sectors in terms of jobs in East Kent are:

- Health (15% of jobs)
- Retail (11%)
- Education (11%)
- Accommodation and food (9%)
- Business administration and support (7%)
- Manufacturing (7%)

East Kent accounts for 63% of Kent and Medway life sciences, 51% of K&M agriculture and horticulture, 46% of K&M visitor economy.

Trends in employment and productivity: Between 2015 and 2019 employment in East Kent grew by 3% (10,500 jobs), the largest growth sectors being construction (+3,000 jobs) and the professional, science and technical services sector (+2,500 jobs). Growth in GVA per head has been significantly lower than the England average in each of the East Kent Districts. Growth has been strongest in Ashford.

The highest future trend-based growth in employment to 2027 is forecast for health and social care, the visitor experience economy, and digital tech / creative and cultural sectors.

¹ East Kent here is taken to mean the Districts / Boroughs of Canterbury, Ashford, Thanet, Dover, Swale and Folkestone & Hythe.

² This report makes use of two types of industry sector definition: 1) standard sector definitions used by the Office for National Statistics, usually labelled A to U, further details at <https://www.ons.gov.uk/methodology/classificationsandstandards/ukstandardindustrialclassificationofeconomicactivities/uksic2007> and 2) bespoke sector definitions created by KCC for the Kent and Medway Resilience and Renewal Plan to represent key sectors of the Kent economy. These are referred to as 'KMEP priority sectors' in this report.

Modelling also suggests that the overall net annual demand to 2027 for new entrants to the labour market, taking into new jobs and replacing those who leave the workforce, is over 13,000 in East Kent. This highest volume occupations required are 1,800 care staff, 1,700 corporate managers, and 1,300 business & public service associate professionals.

Local stakeholder views on economic needs: district, borough and county stakeholders identified the following priority sector skills needs:

- Manufacturing
- Visitor / experience economy
- Creative and cultural / digital tech
- Development and construction (note anticipated high levels of house building and infrastructure projects)
- Health and social care
- Transport and logistics
- Agriculture and horticulture / food / viticulture

Stakeholders also highlighted a number of more generic or 'cross-cutting' skills needs:

- Employability skills
- Re-training for adults
- Entrepreneurship and business management (including self-employment)
- IT and digital skills
- Customer-related skills

It was also noted that FE should be responding to the opportunities created by 'transformational projects' like Newtown Works in Ashford, and that growth in the hotel sector can also be expected, despite the short-term impact of Covid on the investment climate.

All stakeholders highlighted the importance of sustainability and 'net zero' (carbon emissions) in the coming decade. This will impact on multiple curriculum areas including skilled trades (eg construction, equipment installation and maintenance, transport and logistics) and increase further the need for related digital skills.

Community Needs Analysis

Community profile: East Kent has a resident population of around 819,000 people, of whom 490,000 are working age (16-64).

- Like many coastal areas, it has a higher proportion of retirement age residents than the national average and fewer working age residents.
- In the 2011 Census 5% of East Kent residents were identified as being from a Black, Asian, or Minority Ethnic (BAME) background.
- 23% of working age people in East Kent report that they have a disability in surveys by the Office for National Statistics, the local proportion varying from just 15% in Ashford to 35% in Thanet.

Unemployment and economic inactivity: there are significant challenges in terms of unemployment and economic inactivity:

- 33,000 people were unemployed in East Kent in January 2021. A further 97,000 were economically inactive, of whom over 13,000 would like a job.

- Claimant count unemployment on this measure varies significantly between East Kent Districts: unemployment in Thanet in January 2021 was double that of Canterbury, for example.
- Economic inactivity rates for working age people are also higher than the national average in three of the six East Kent Districts.
- Unemployment has increased sharply during the Covid pandemic, with more than one in ten young people unemployed in five of the six East Kent Districts in .

Social needs: there are major social challenges to be addressed:

- 96,000 East Kent working age residents are on benefits, including 25,000 people on Universal Credit in work. The picture varies by local authority area, but Thanet has the highest level of people on benefits.
- There are 25,000 children living in low-income families in East Kent, and the proportion of children in low-income families is higher than the average for the South East region in all six East Kent Districts.
- There are also significant pockets of deprivation: four of the six East Kent Districts are in the bottom quartile nationally in terms of the Employment deprivation measure.

The resident qualifications profile is poor compared with GB as a whole:

- Fewer residents have qualifications at level 3 or above (54% compared with 57%)
- Significantly fewer have qualifications at level 4 or above (32% compared with 40%).
- 40,000 East Kent residents have no qualifications at all.

The proportion of working age residents with no qualifications is slightly higher in Swale and Thanet.

Young People: the likely need for Further Education is growing:

- Following a period of contraction, the number of 15-19 year olds is expected to significantly increase over the next 5-7 years. By 2028 there will be around 20% more 15-19 year olds across Kent & Medway than now, an increase of nearly 10,000 potential students across East Kent, with the highest growth in Ashford.

In 2019, around 2,500 East Kent young people per year went into FE after Year 11. About 215 went into employment with training. 4,500 Year 11s stayed in school. For the first time since 2014, the number of leavers going into Further Education increased with the number going into V1th form declining slightly.

Young people with SEND: based on KCC's draft *Strategy for Children and Young People with SEND 2021-24*, it seems likely that the need for services in this area will increase, at least in the short term. It also seems that commissioning will focus on outcomes such as improved transitions between one form of provision and another, improved attainment (including Level 2 and 3 qualifications), and reduced exclusions and higher levels of attendance.

Local stakeholder views on community needs of relevance to FE tended to focus on four broad areas:

In overview, the key community needs that stand out are:

- Population growth, driven by house building, which will increase demand for all public services, including Further Education.
- Deprivation, which creates locally specific needs for actions which improve people's employability and raise skills and qualifications levels, while also aiding social inclusion and wellbeing.
- The revitalisation of town centres, due to the impact of Covid but also because of longer term structural changes.

- People re-locating to East Kent raise both opportunities and challenges. They include people in care and looked-after children, people in need of housing from London Boroughs, as well as professionals working flexibly or re-locating out of London.

Given that education and skills is seen as a bridge to employment and improved labour market prospects, many of these community challenges also tend to be linked by stakeholders to some of the skills needs identified earlier, in areas like employability, essential skills, re-training and skills of relevance to key economic sectors.

Key Conclusions

the key conclusions that can be drawn from the analysis are as follows:

1. EKC Group's offer should focus in particular on the following sectors:
 - **Those which account for most employment:** health, retail, accommodation and food, business administration and support and manufacturing.
 - **Those with the highest levels of employment growth:** which are development and construction; and professional, science and technical services.
 - **Sector priorities identified by local stakeholders,** ie: manufacturing; visitor / experience economy (including hotels); creative and cultural / digital tech; development and construction; health and social care; transport and logistics; and agriculture / horticulture / food / viticulture.
2. The curriculum should help people to access **occupations with the highest numbers of new entrants required**, the three largest of which are care staff, corporate managers and business and public service associate professionals.
3. There are also **cross-cutting skills needs** across the whole economy, which are employability skills (including essential skills); re-training for adults; entrepreneurship and business management; IT and digital skills; and customer-related skills.
4. Curriculum should respond to **major projects**, such as Newtown Works
5. Needs also arise from major cross-sectoral developments, in particular the drive for **sustainability and 'net zero' and digitalisation**.
6. EKC Group's offer can also play a role in **addressing East Kent social challenges**, such as high levels of unemployment and economic inactivity; poverty; deprivation in specific areas of East Kent; and poor levels of educational attainment in parts of the community.
7. The volume of programmes on offer is likely to need to increase, given an **anticipated increased in demand for FE**, arising from a growth in the Year 11 population in the coming years. This may also include an increased need for FE for young people with SEND.

1. Introduction

1.1 Background

EKC Group is taking forward an important strategic project called 'Curriculum 2030', which, with the acquisition of Ashford College and Spring Lane animal management and horticulture training centre now completed, will set the strategy for the Group's future curriculum.

In line with the approach set out in the *Strategic Plan 2020-2024*³, Curriculum 2030 will aim to ensure that the Group's provision addresses the economic and community needs of East Kent⁴, rather than involving a more opportunistic development of new market opportunities.

The report authors are also developing for Kent and Medway Economic Partnership (KMEP) a new *Kent and Medway Workforce Skills Evidence Base 2021 (WSEB 2021)*, which gives a sub-regional perspective on economic and community drivers of skills needs. The KMEP report will be available in late April 2021 and is a further source of useful intelligence, especially in terms of the sector-specific focus groups that were conducted with industry leaders. These provided valuable insights into the key issues and dynamics of change in the twelve industry sectors considered and potential priorities for action by FE and other partners.

This EKC Group report looks much more specifically and in greater detail at the needs of East Kent as a whole and of the individual Districts and Boroughs that make up the wider area.

1.2 Methodology

The analysis draws on the following data sources:

- A comprehensive review of national statistics and forecasts analysed for the East Kent area;
- A review of existing reports and a range of key documents; and
- Depth interviews with senior officers from all six East Kent Districts and Boroughs, KCC and Locate in Kent.

The report authors wish to thank the following senior officers from EKC Group stakeholder organisations who generously gave their time to be interviewed as part of the research:

Louise Askew, Director of Regeneration, Thanet District Council

Nick Churchill, Property & Regeneration Strategy Manager, Canterbury City Council

Ewan Green, Director of Place and Katherine Harvey, Chief Economic Development Officer, Folkestone and Hythe District Council

Tim Ingleton, Head of Inward Investment and Tourism, Dover District Council

Kieren Mansfield, Economy & Community Services Manager, Swale Borough Council

Andrew Osborne, Economic Development Manager, Ashford Borough Council

Simon Ryan, Director of Investment, Locate in Kent

David Smith, Director, Economic Development, Kent County Council

³ <https://www.ekcgroup.ac.uk/sites/default/files/Strategic%20Plan%20Consultation.pdf>

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We have then assessed all the different data sources to identify the greatest areas of need of relevance to curriculum.

The report's tables and figures refers where appropriate to specific industry sectors. In order to ensure consistency and comparability we have profiled the economy using both standard sector definitions from national statistics and the more bespoke KMEP 'key sector' definitions used in the *WSEB 2021* and the *Kent and Medway Economic Renewal and Resilience Plan* (August 2020)⁵. The KMEP 'key sectors' from WSEB include some non-standard groupings such as 'the visitor economy', 'creative and cultural industries' and 'digital tech'. These bespoke sectors overlap and taken collectively do not cover the whole economy. Using their definitions some businesses and employment will be counted more than once and others not at all. These 'key sectors' may therefore be useful for engaging with businesses and relevant stakeholders on a curriculum or subject area basis but they are not appropriate for reviewing patterns across the East Kent economy as a whole.

1.3 Report Structure

The report is divided into the following sections:

Section 2 considers the economic needs of East Kent and their implications for curriculum planning.

Section 3 undertakes a similar exercise from the perspective of community needs.

Section 4 reviews the previous 2 sections to propose some key conclusions and recommendations.

Annex 1 sets out the local authority key economic and community issues and priorities for each of the six East Kent Districts and Boroughs.

Annex 2 sets out, in matrix form, the potential relevance of Sector Subject Areas (SSAs) to the industry sectors considered in the report. While not an 'exact science' – workforce skills needs are in practice more complex – this may be of some value in the interpretation of the needs identified in this report in respect of curriculum planning. The matrix also shows the fact that many SSAs can, of course, be relevant to multiple sectors.

⁵ https://www.kent.gov.uk/__data/assets/pdf_file/0014/112280/Economic-Renewal-and-Resilience-Plan-Backing-Jobs-and-Businesses-Plan.pdf

2. Economic Needs Analysis

The future demand for skills and qualifications in East Kent will depend on the business and economic needs of the sub-region as well as those of its resident communities. This section considers the economic needs of East Kent and their implications for EKC Group's activities. It analyses the nature of the business base, the key features of the labour market, employment by sector and occupation, likely future demand for skills, and the views of key stakeholders.

Summary

Business profile: in common with the rest of Kent, 90% of East Kent businesses employ 9 or fewer people, but these micro-businesses account for just 31% of employment, whilst businesses with 50 or more employees account for nearly half (46%).

The East Kent Labour Market: East Kent is a low-wage, low-productivity economy. Job density is comparable with Kent and Medway and the SELEP area, but significantly below that for Great Britain. This suggests a need to stimulate growth of the economy and employment by helping businesses to start up and scale up.

Employment by sector and occupation: Education, health and retail are the largest sectors in terms of employment, accounting for 37% of jobs. In terms of business enterprises, construction and the professional services sector are the largest, highlighting the prominence of micro and small businesses in both sectors. Compared with GB as a whole, education, retail, agriculture and motor trades (sale and repair of vehicles) are also *relative* strengths in terms of employment. There is also lower percentage of people in professional occupations than Kent & Medway as a whole, and slightly more in skilled trades and caring occupations. Construction, Property and Transport & Storage sectors are the highest productivity sectors.

Employment by sector⁶: the largest sectors in terms of jobs in East Kent are:

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It was also noted that FE should be responding to the opportunities created by 'transformational projects' like Newtown Works in Ashford, and that growth in the hotel sector can also be expected, despite the short-term impact of Covid on the investment climate.

All stakeholders highlighted the importance of sustainability and 'net zero' (carbon emissions) in the coming decade. This will impact on multiple curriculum areas including skilled trades (eg construction, equipment installation and maintenance, transport and logistics) and increase further the need for related digital skills.

2.1 Business Profile

Despite the unprecedented challenges facing East Kent (and the UK) in 2021, the future demand for skills will continue to be strongly influenced by the profile of current businesses.

According to national statistics there are 28,000 business enterprises in East Kent and over 33,000 local business units. An enterprise is defined as the smallest group of legal business units that has a significant degree of autonomy. These businesses employ over 291,000 people in East Kent and a further 82,000 are self-employed in the sub-region (Fig 2.1 below).

Fig 2.1: Business Population and Employment

	East Kent	% K&M
Enterprises	28,400	39%
Local Units	33,540	40%
Employees	291,500	40%
Jobs (incl self-employment)	373,600	43%

Source: ONS UK Business Counts 2020, BRES & Jobs Density 2019

East Kent accounts for around 40% of Kent & Medway's businesses and employment. Within the sub-region, Canterbury is the largest District in terms of employment, closely followed by Ashford (Fig 2.2 below).

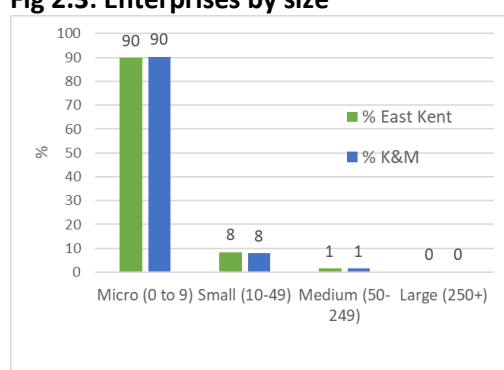
Fig 2.2: Enterprises & Employment by District

	% East Kent		% East Kent	
	Enterprises		Employment	
Ashford	6,575	23%	60,500	20%
Canterbury	5,400	19%	69,000	23%
Dover	3,570	13%	37,000	12%
Folkestone & Hythe	3,750	13%	40,000	13%
Swale	5,020	18%	53,000	17%
Thanet	4,050	14%	44,000	14%
East Kent	28,365	100%	303,500	100%

Source: ONS UK Business Counts 2020, BRES 2019

Most business enterprises are very small (see Figure 2.3 below), **90% employ fewer than ten people** (including business owners).

Fig 2.3: Enterprises by size

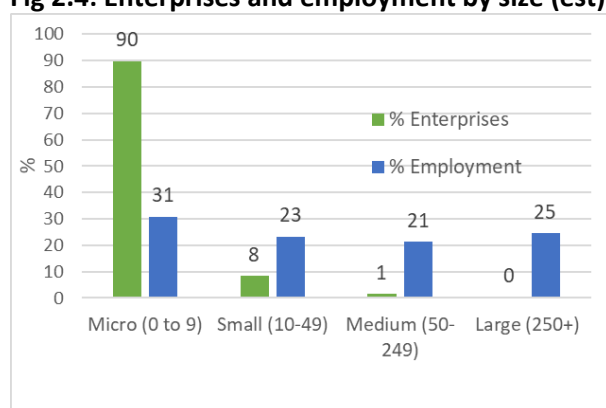


Source: ONS UK Business Counts 2020

However, when viewed in terms of employment, there is a much more even spread (see Figure 2.4 below).

Micro businesses account for just 31% of employment whilst businesses with 50 or more employees account for nearly half (46%). This highlights the importance of the College engaging with the relatively small number of medium to large businesses in the area, as well as microbusinesses.

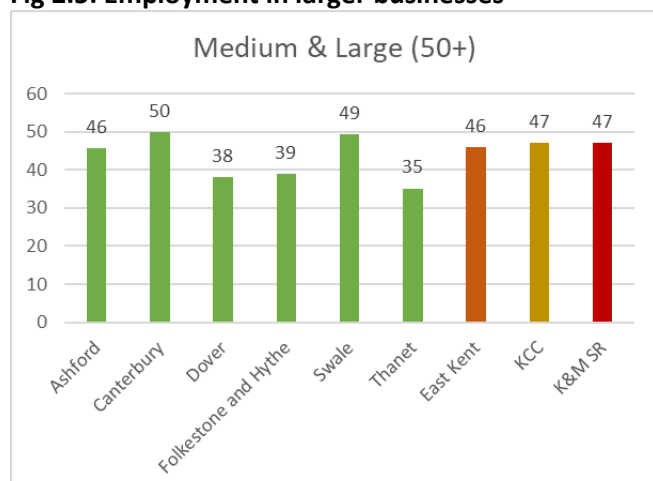
Fig 2.4: Enterprises and employment by size (est)



Source: Estimated from ONS UK Business Counts 2020, BRES 2019

Figure 2.5 (below) highlights that the proportion of medium and large enterprises (businesses and other organisations) does vary between East Kent Districts. In Canterbury, 50% of employment is in larger enterprises, whilst in Thanet it is just over a third (35%).

Fig 2.5: Employment in larger businesses



Source: Estimated from ONS UK Business Counts 2020, BRES 2019

2.2 The East Kent Labour Market

Although East Kent is a sizable local economy, there are fewer local jobs than would be expected if the sub-region reflected the GB economy as a whole. Nationally, there are 0.89 jobs for every working age (16-64) adult but only 0.77 in East Kent (Fig 2.6).

Fig 2.6: Job density (labour market stress/slack)

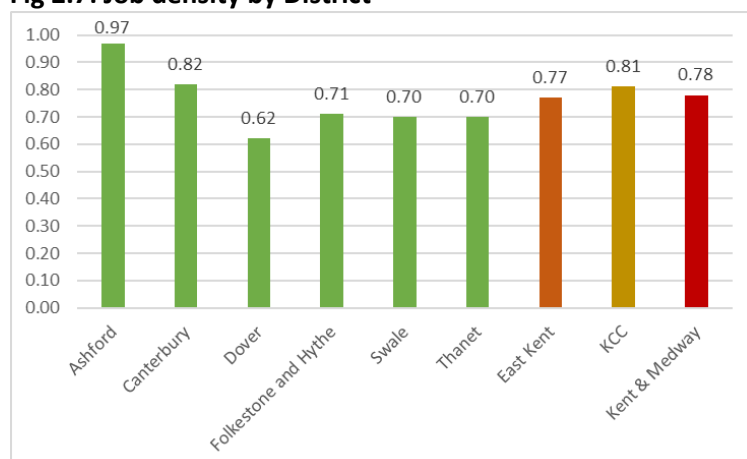
	East Kent (density)	KM (density)	SELEP (density)	GB (density)
Jobs density	0.77	0.78	0.78	0.87

Source: ONS Jobs Density 2019

This indicates a certain level of slack in the labour market in East Kent and the wider sub-region and suggests a **need to stimulate growth of the economy and employment by helping businesses to start up and scale up**. The challenge is further underlined by the relative absence of larger employers who can contribute significantly to local employment.

Figure 2.7 (below) shows that job densities also vary by District / Borough within East Kent. Ashford has a job density significantly above the national average, but four of the six districts have job densities between 0.62 and 0.70, significantly below national and regional averages.

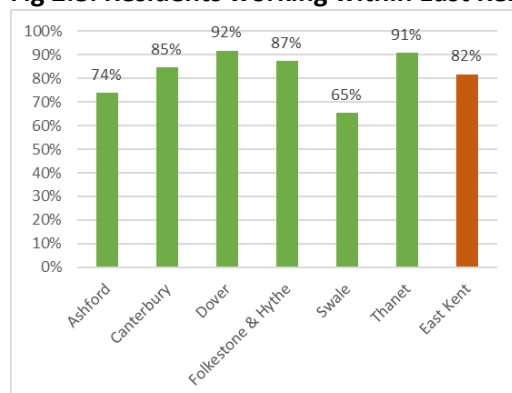
Fig 2.7: Job density by District



Source: ONS Jobs Density 2019

The East Kent labour market is relatively self-contained. Some 82% of employed residents from East Kent work within the area. This rises to 92% in Dover and 91% in Thanet (Fig 2.8 below). The relative isolation of East Kent as a peninsular economy is also apparent in these figures.

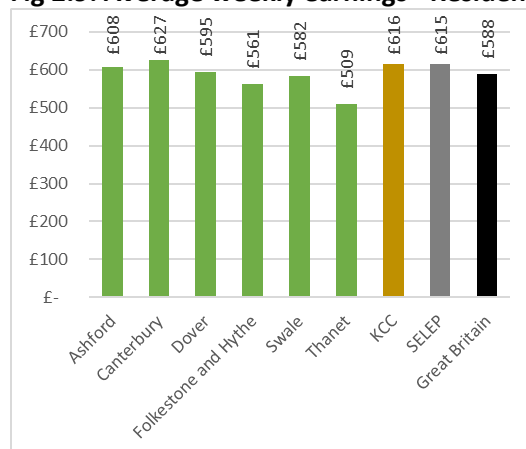
Fig 2.8: Residents working within East Kent



Source: Census 2011. Adults in work resident in East Kent

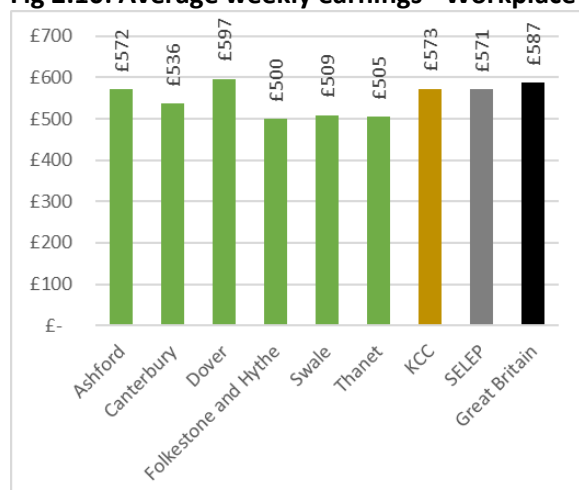
Figures 2.9 and 2.10 (below) highlight that average earnings in East Kent are higher for residents than they are for those who work in the area. This suggests that, despite relative self-containment, commuting has a significant positive economic impact, bringing money into the sub-region's economy. However, it also suggests a relative paucity of highly paid job opportunities locally, that **East Kent is a low-wage economy** compared with Kent, SELEP and Great Britain.

Fig 2.9: Average weekly earnings - Residents



Source ASHE 2019. Median weekly pay – full-time workers

Fig 2.10: Average weekly earnings - Workplace



Source ASHE 2019. Median weekly pay – full-time workers

National statistics also suggest that **East Kent is a low-productivity economy**, with GVA per head significantly below the national average. Figure 2.11 (below) highlights that the value added by economic activity in every district in East Kent is significantly below the national average when divided by the number of residents. This falls to around half the national average in Thanet and is only 79% in Ashford, the best performing East Kent District.

Figure 2.11: Productivity in East Kent (£ per head)

	GVA per head	% of England average
Ashford	23,100	79%
Canterbury	19,700	67%
Dover	19,800	67%
Folkestone & Hythe	20,900	71%
Swale	18,100	62%
Thanet	14,700	50%
Kent	23,500	80%
Kent & Medway	23,000	78%
England	29,400	100%

Source: ONS GVA 2018, KCC Strategic Commissioning - Analytics

2.3 Employment by Sector & Occupation

Figure 2.12 (below) shows the current profile of East Kent businesses and employment by standard industrial sectors. **Education, health and retail are the largest sectors in terms of employment**, accounting for 37% of the East Kent labour market. However, **in terms of business enterprises, construction and the professional services sector are the largest**, highlighting the prominence of micro and small businesses in both sectors.

Fig 2.12: Enterprises and employment by sector

Standard Industries	Enterprises	% ents	% emp
1 : Agriculture, forestry & fishing (A)	1,280	5%	3%
2 : Mining, quarrying & utilities (B,D,E)	165	1%	1%
3 : Manufacturing (C)	1,525	5%	7%
4 : Construction (F)	4,690	17%	5%
5 : Motor trades (Part G)	865	3%	2%
6 : Wholesale (Part G)	1,085	4%	4%
7 : Retail (Part G)	2,040	7%	11%
8 : Transport & storage (H)	1,075	4%	5%
9 : Accommodation & food (I)	2,060	7%	9%
10 : Information & communication (J)	1,690	6%	2%
11 : Financial & insurance (K)	665	2%	2%
12 : Property (L)	925	3%	1%
13 : Prof, sci. & tech (M)	4,345	15%	6%
14 : Business admin & support (N)	2,365	8%	7%
15 : Public administration & defence (O)	150	1%	4%
16 : Education (P)	525	2%	11%
17 : Health (Q)	1,115	4%	15%
18 : Arts etc (R,S,T, U)	1,795	6%	4%
Total	28,360	100%	100%

Source: ONS UK Business Counts 2020, BRES 2019. SIC 2007.

Education, health, and retail are major employment sectors throughout the UK economy. However, Figure 2.13 shows that **education, retail, agriculture and motor trades (sale and repair of vehicles) are also relative strengths in East Kent**. (An index of 2 would indicate twice the national proportion of employment. An index of 0.5 would indicate half as much.) Agriculture employs almost twice as many people in the sub-region as you would expect if the East Kent economy reflected the structure of Great Britain as a whole. Education employs 30% more than expected.

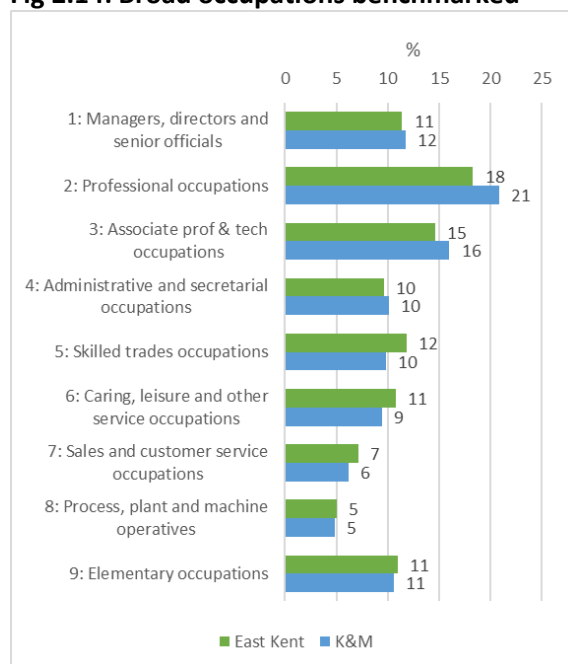
Fig 2.13: Sector employment (compared with GB)

Standard Industries	East Kent	K&M
1 : Agriculture, forestry & fishing (A)	1.9	1.5
2 : Mining, quarrying & utilities (B,D,E)	1.0	1.1
3 : Manufacturing (C)	0.9	0.8
4 : Construction (F)	1.1	1.4
5 : Motor trades (Part G)	1.2	1.3
6 : Wholesale (Part G)	1.0	1.1
7 : Retail (Part G)	1.2	1.2
8 : Transport & storage (H)	1.1	1.1
9 : Accommodation & food (I)	1.1	1.0
10 : Information & communication (J)	0.5	0.6
11 : Financial & insurance (K)	0.5	0.7
12 : Property (L)	0.6	0.8
13 : Prof, sci. & tech (M)	0.7	0.8
14 : Business admin & support (N)	0.8	1.0
15 : Public administration & defence (O)	0.9	0.9
16 : Education (P)	1.3	1.1
17 : Health (Q)	1.1	1.0
18 : Arts etc (R,S,T, U)	1.0	0.9
Total	1.0	1.0

Source: ONS BRES 2019. Location Quotients.

East Kent's occupational profile reveals a **lower percentage of people in professional occupations than Kent & Medway as a whole and slightly more in skilled trades and caring occupations** (Figure 2.14 below).

Fig 2.14: Broad occupations benchmarked



Source: ONS APS Oct19-Sep20. SOC 2010. Jobs (employment and self-employment)

Nevertheless, **professional occupations are the largest overall broad category** and Figure 2.15 (below) highlights that there are over 70,000 people working in these occupations in East Kent.

Fig 2.15: Jobs by broad occupation

Standard Broad Occupations (SOC 2010)	East Kent
1: Managers, directors and senior officials	44,200
2: Professional occupations	70,800
3: Associate prof & tech occupations	56,400
4: Administrative and secretarial occupations	37,100
5: Skilled trades occupations	45,600
6: Caring, leisure and other service occupations	41,800
7: Sales and customer service occupations	27,500
8: Process, plant and machine operatives	19,300
9: Elementary occupations	42,700

Source: ONS APS Oct19-Sep20. SOC 2010. Jobs (employment and self-employment)

Improving workforce skills is a key component of increasing economic output through greater productivity. Figure 2.16 (below) highlights that the **Construction, Property and Transport & Storage sectors are the highest productivity sectors in East Kent**, accounting for a higher proportion of the economic output than their employment numbers would suggest.

Fig 2.16: GVA by sector in East Kent (£millions)

Standard Industries	GVA	% GVA	% Emp
1,2 : Primary industries & Utilities (A)	731	5%	4%
3 : Manufacturing (C)	1,324	8%	7%
4 : Construction (F)	1,194	8%	5%
5,6,7 : Wholesale & Retail	1,826	12%	17%
8 : Transport & storage (H)	1,431	9%	5%
9 : Accommodation & food (I)	493	3%	9%
10 : Information & communication (J)	353	2%	2%
11 : Financial & insurance (K)	172	1%	2%
12 : Property (L)	2,632	17%	1%
13 : Prof, sci. & tech (M)	808	5%	6%
14 : Business admin & support (N)	747	5%	7%
15 : Public administration & defence (O)	788	5%	4%
16 : Education (P)	1,355	9%	11%
17 : Health (Q)	1,148	7%	15%
18 : Arts etc (R,S,T, U)	664	4%	4%
Total	15,666	100%	100%

Source: ONS GVA 2018, KCC Strategic Commissioning - Analytics

2.4 Employment in KMEP Key Sectors

Kent & Medway Economic Partnership's *Renewal & Resilience Plan*, developed in the light of the challenges of Brexit, Covid-19 and global economic uncertainty, highlights a number of key sectors for Kent and Medway.

Fig 2.17: Employment in KMEP Key Sectors

Key Sectors	Employment	% East Kent Emp	% of K&M sector in East Kent
Agriculture	9,000	3%	51%
Creative & Cultural Industries	4,250	1%	37%
Development & Construction	20,000	7%	32%
Digital Tech	5,500	2%	32%
Education	32,500	11%	45%
Energy, Utilities & Environmental Tech	3,750	1%	38%
Financial and Professional Services	45,000	15%	34%
Health & Social Care	44,500	15%	45%
Life Sciences	2,685	1%	63%
Manufacturing	22,000	7%	45%
Retail & Wholesale	52,000	17%	40%
Transport & Logistics	16,500	5%	41%
Visitor Economy	34,500	11%	46%

Source: ONS BRES 2019

Figure 2.17 (above) highlights that **East Kent accounts for the following percentages of Kent and Medway employment by sector:**

- 63% of life sciences
- 51% of agriculture and horticulture
- 46% of visitor economy
- 45% of each of manufacturing, education, and health and social care
- 41% of transport and logistics, and
- 40% of retail and wholesale

By these definitions the **largest sectors in terms of jobs in East Kent** are:

- Retail and wholesale (52,000)
- Financial and professional services (45,000)
- Health and social care (44,500)
- Visitor economy (34,500) and
- Education (32,500)

Although employment in the life sciences sector is relatively small in scale, Ashford, Dover and Swale all have concentrations of employment in the sector that are above the national average. Figure 2.18 (below) highlights that there are also local concentrations of employment in transport & logistics and the visitor economy.

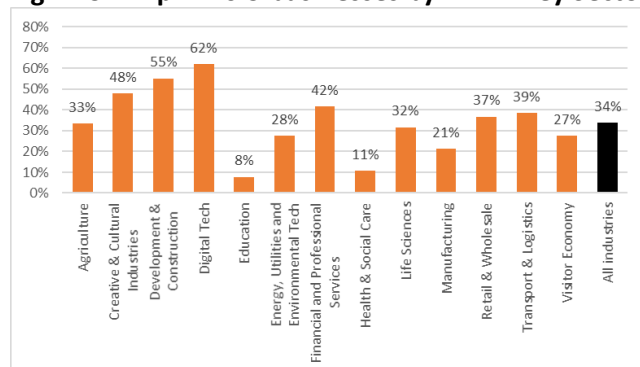
Fig 2.18: KMEP Key Sector Employment Location Quotients by District

Key Sectors	Ashford	Canterbury	Dover	Folkestone & Hythe	Swale	Thanet	East Kent
Agriculture	2.4	1.7	1.9	1.0	3.6	0.4	1.9
Creative & Cultural Industries	0.6	0.7	0.7	0.7	0.4	0.6	0.6
Development & Construction	1.0	0.8	0.9	0.9	1.2	1.0	1.0
Digital Tech	0.7	0.6	0.4	0.5	0.4	0.5	0.5
Education	0.8	2.1	1.1	0.8	1.0	1.4	1.3
Energy, Utilities & Env	0.9	0.3	0.7	1.8	1.7	1.0	1.0
Financial & Prof Services	0.7	0.7	0.6	1.1	0.7	0.5	0.7
Health & Social Care	1.2	1.3	1.0	1.0	0.7	1.6	1.1
Life Sciences	1.4	0.1	5.1	0.1	1.4	0.2	1.2
Manufacturing	1.2	0.4	1.1	0.6	1.6	0.9	1.0
Retail & Wholesale	1.4	1.2	0.9	0.9	1.1	1.2	1.2
Transport & Logistics	0.9	0.4	2.2	1.3	1.9	0.8	1.1
Visitor Economy	0.9	1.1	1.1	1.6	0.8	1.2	1.1

Source: ONS BRES 2019

Supporting key sectors will also mean engaging with businesses of different sizes. The preponderance of micro-businesses varies significantly by sector. Figure 2.19 (below) shows that nearly two thirds of employment (62%) in the digital tech sector, for example, is in micro-businesses employing fewer than ten people, while for health and social care the figure is only 11%. This has important implications for employer engagement by EKC Group: small businesses may have less sophisticated approaches to people management and, with fewer staff, their scope and need to engage with EKC group services and activities is lower.

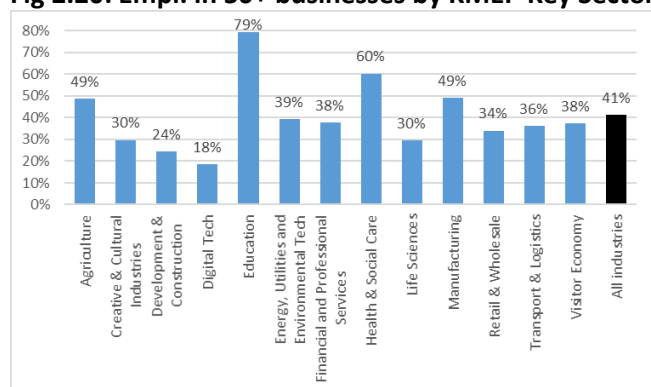
Fig 2.19: Empl. in 0-9 businesses by KMEP Key Sector



Source: Estimated from ONS UK Business Counts 2020, BRES 2019

Figure 2.20 (below) highlights that employment in the Education, Health and Manufacturing sectors is especially focused on medium and large businesses and organisations.

Fig 2.20: Empl. in 50+ businesses by KMEP Key Sector



Source: Estimated from ONS UK Business Counts 2020, BRES 2019

2.5 Trends in Employment and Productivity

Over the last few years for which we have consistent employment data (2015-2019), **employment in East Kent grew by 3% (10,500 jobs)**. **Figure 2.21 (below) highlights that the largest growth sectors were construction (+3,000 jobs) and the professional, science and technical services sector (+2,500 jobs).**

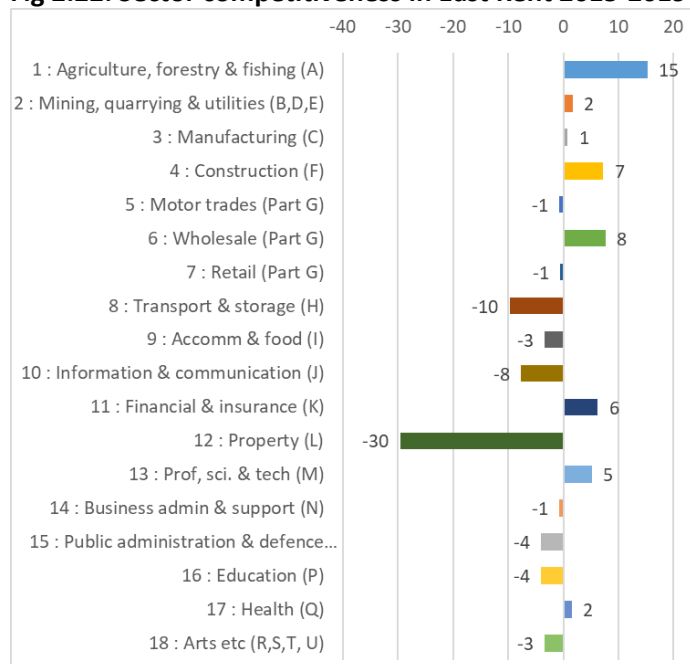
Fig 2.21: Employment change 2015-2019

Standard Industries	East Kent	E. Kent %	K&M %
1 : Agriculture, forestry & fishing (A)	1,500	+17	+6
2 : Mining, quarrying & utilities (B,D,E)	250	+7	+15
3 : Manufacturing (C)	500	+2	+3
4 : Construction (F)	3,000	+18	+17
5 : Motor trades (Part G)	500	+7	+14
6 : Wholesale (Part G)	1,000	+8	-2
7 : Retail (Part G)	-1,000	-3	-2
8 : Transport & storage (H)	0	0	+5
9 : Accommodation & food (I)	1,500	+6	+9
10 : Information & communication (J)	0	0	-3
11 : Financial & insurance (K)	500	+9	-3
12 : Property (L)	-750	-20	-18
13 : Prof, sci. & tech (M)	2,500	+13	0
14 : Business admin & support (N)	500	+2	-2
15 : Public administration & defence (O)	0	0	-2
16 : Education (P)	-1,500	-5	-1
17 : Health (Q)	2,000	+4	+1
18 : Arts etc (R,S,T, U)	0	0	-2
Total	10,500	+3	+2

Source: ONS BRES 2015-19

Figure 2.22 looks at the sector competitiveness of the East Kent economy over that period using 'shift-share' analysis that takes out 'general' economic growth and sector dynamics at a national level. This highlights that the agriculture, construction, and wholesale sectors have performed better than expected in the sub-region but that the property (real estate), transport and storage, and ICT sectors have performed significantly worse.

Fig 2.22: Sector competitiveness in East Kent 2015-2019



Source: Shift-share analysis based on BRES 2015-19

Between 2013 and 2018 (latest available data), the economic output of the East Kent economy grew by 17%. Figure 2.23 highlights that **the property (real estate) and professional, scientific and technical services played a significant part in that growth, offsetting a significant contraction in output from the finance and insurance sector in East Kent.**

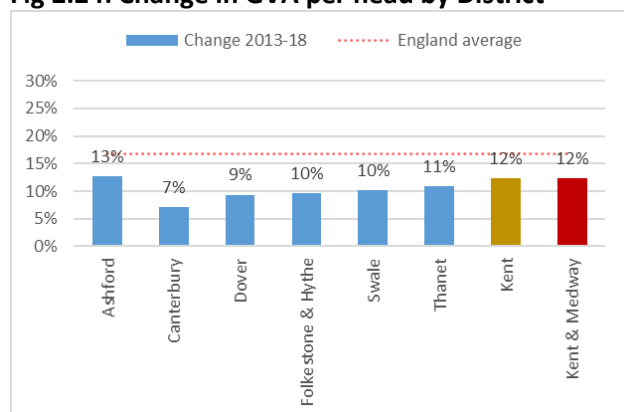
Fig 2.23: Change in GVA 2013-2018

Standard Industries	Change in GVA 2013-2018	% of East Kent's growth
1,2 : Primary industries & Utilities (ABD)	17%	5%
3 : Manufacturing (C)	-1%	-1%
4 : Construction (F)	34%	13%
5,6,7 : Wholesale & Retail	26%	17%
8 : Transport & storage (H)	19%	10%
9 : Accommodation & food (I)	18%	3%
10 : Information & communication (J)	23%	3%
11 : Financial & insurance (K)	-58%	-11%
12 : Property (L)	26%	24%
13 : Prof, sci. & tech (M)	26%	24%
14 : Business admin & support (N)	2%	1%
15 : Public administration & defence (O)	-5%	-2%
16 : Education (P)	14%	7%
17 : Health (Q)	29%	11%
18 : Arts etc (R,S,T, U)	39%	3%
Total	17%	100%

Source: ONS GVA 2013-18, KCC Strategic Commissioning - Analytics

However, **growth in GVA per head was significantly lower than the national (England) average (17%) in each of the East Kent Districts. Growth was strongest in Ashford.**

Fig 2.24: Change in GVA per head by District



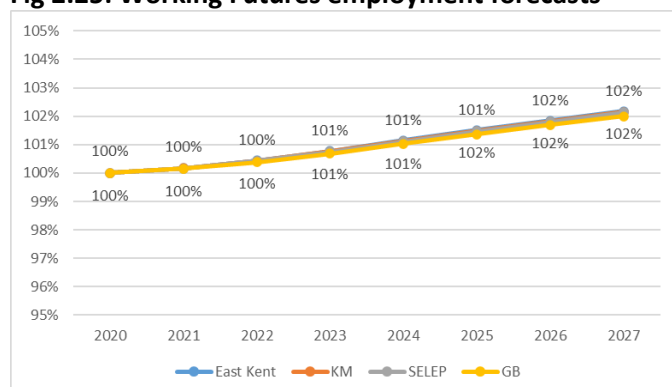
Source: ONS GVA 20-1318, KCC Strategic Commissioning - Analytics

This highlights the continuing need to support local businesses to improve productivity and competitiveness through developing the skills of their workforce.

2.6 Forecast Employment and Skills Needs

The Department for Education's Working Futures employment forecasting model predicts that employment growth in the South East Local Enterprise Partnership area will be close to the national average (2% by 2027).

Fig 2.25: Working Futures employment forecasts



Source: DfE Working Futures 2017-2027. SELEP workbook. East Kent & KM figures estimated using Working Futures and ONS BRES 2019.

Looking at the DfE forecasts by sector and adjusting for local economic mix, suggests there is no reason why employment in East Kent should not also grow by 2% over the next few years. These forecasts were published in 2020 and take some account of the economic outlook post-Brexit. However, the model was developed before the Covid-19 pandemic and can best be described as a backdrop on which we must overlay intelligence about the relative economic impact of the pandemic on the outlook for different business sectors, as it emerges. The Office for Budget Responsibility is currently forecasting that GDP and employment rates may not return to 2019 (pre-COVID) levels until late 2022.⁷

Figure 2.26 highlights that the Working Futures 'backdrop' forecast suggests that the manufacturing sector will further decline in employment over the next six years but that this will be offset by an increase in employment in the health and social care sector, the accommodation and food sector and the education

⁷ Office for Budget Responsibility (OBR), March 2021. Economic and fiscal outlook.

sector. The accommodation and food sector has however been particularly hard hit by the current pandemic.

Fig 2.26: Employment forecasts by sector

Standard Industries (SIC 2007)	2020-2027	East Kent est.
1 : Agriculture, forestry & fishing (A)	-3%	-300
2 : Mining, quarrying & utilities (B,D,E)	3%	+100
3 : Manufacturing (C)	-10%	-2200
4 : Construction (F)	2%	+300
5-7 : Wholesale & Retail	2%	+1000
8 : Transport & storage (H)	-1%	-200
9 : Accommodation & food (I)	7%	+1900
10 : Information & communication (J)	3%	+200
11 : Financial & insurance (K)	-6%	-300
12 : Property (L)	6%	+200
13 : Prof, sci. & tech (M)	3%	+600
14 : Business admin & support (N)	3%	+700
15 : Public administration & defence (O)	0%	-100
16 : Education (P)	4%	+1300
17 : Health (Q)	7%	+2900
18 : Arts etc (R,S,T, U)	2%	+300
All industries	2%	+6600

Source: DfE Working Futures 2017-2027. SELEP workbook. Local figures estimated using Working Futures and ONS BRES 2019.

In terms of the non-standard key sectors highlighted by the KMEP *Renewal and Resilience Plan*, the key points to note from the forecasts (see Figure 2.27 below) are that:

- **Health and social care has the highest forecast growth in employment (2,900 extra jobs).**
- **Employment growth in the Visitor economy is also expected to be strong**, although as we noted above, this would require a significant bounce back in an immediate post-Covid context.
- **Some employment growth is expected in the digital tech and creative and cultural sectors** although it is expected to be relatively modest.
- **Employment in life sciences is not forecast to grow significantly.** In part this is because the outlook for employment in pharmaceutical manufacturing is less buoyant than that for research and development activities.

Fig 2.27 Employment forecasts by KMEP key sector

Key Sectors	% Change 2020-2027	East Kent equivalen
Agriculture	-3%	-300
Creative & Cultural Industries	2%	+100
Development & Construction	3%	+500
Digital Tech	3%	+200
Education	4%	+1300
Energy, Utilities and Environmental Tec	4%	+100
Financial and Professional Services	2%	+900
Health & Social Care	7%	+2900
Life Sciences	-1%	0
Manufacturing	-10%	-2100
Retail & Wholesale	2%	+1000
Transport & Logistics	-1%	-200
Visitor Economy	6%	+2200
All industries	2%	+6600

Source: DfE Working Futures 2017-2027. SELEP workbook. Local figures estimated using Working Futures and ONS BRES 2019.

Most employment demand, though, relates to the replacement of people in jobs that already exist in the economy. Figure 2.27 shows that, despite the relatively low expectations of overall employment growth, the demand for new skills and qualifications will continue to be significant. In many occupations, the demand for new entrants to replace those retiring is about 3-4% of the workforce each year.

The overall net annual demand for new entrants, taking into account both replacement and expansion demand, is over 13,000 in East Kent. This includes 1,800 care staff, 1,700 corporate managers, and 1,300 business & public service associate professionals.

Fig 2.27 Forecasts by occupation (including replacement demand)

Standard Occupations SOC 2010	Est jobs	Annual Expansion demand	Annual Repl Demand	Net annual demand
11 Corporate managers	33,300	1%	4%	1,700
12 Other managers	12,200	1%	4%	700
21 Science, eng. & tech profs	20,000	1%	3%	700
22 Health professionals	14,500	1%	4%	800
23 Teaching & ed profs	17,400	2%	4%	900
24 Busn, media & public profs	19,800	1%	4%	900
31 Sci, eng & tech assoc. profs	6,700	0%	3%	200
32 Health & care assoc profs	5,100	1%	4%	300
33 Protective service occs	4,800	0%	2%	100
34 Culture, media & sports	10,000	1%	3%	400
35 Busn & public assoc profs	28,800	1%	3%	1,300
41 Admin occupations	28,800	-1%	3%	600
42 Secretarial & related	7,400	-5%	3%	- 200
51 Skilled agric & related	3,400	0%	4%	100
52 Skilled metal, elec & electronic	12,100	-1%	2%	100
53 Skilled construction	13,700	0%	3%	400
54 Textiles, print & othr skilled	7,700	-1%	3%	100
61 Caring personal service occs	29,300	2%	4%	1,800
62 Leisure, travel & personal service	9,400	0%	3%	300
71 Sales occupations	20,900	-1%	3%	500
72 Customer service occs	6,900	1%	3%	300
81 Process, plant & machine	6,000	-2%	2%	-
82 Transport & machine ops	13,600	0%	4%	500
91 Elementary trade occs	5,200	-1%	2%	100
92 Elementary admin occs	36,700	0%	3%	1,200
Total	373,600	0%	3%	13,600

Source: DfE Working Futures 2017-2027. SELEP workbook. Local figures estimated using Working Futures and ONS BRES 2019.

Figure 2.28 (below) shows the current qualification profile of people in these occupations. The shading highlights the highest qualifications that more than a quarter of those in an occupation have. It shows that **skills and qualifications at all levels will be needed to fulfil the replacement demand for staff.**

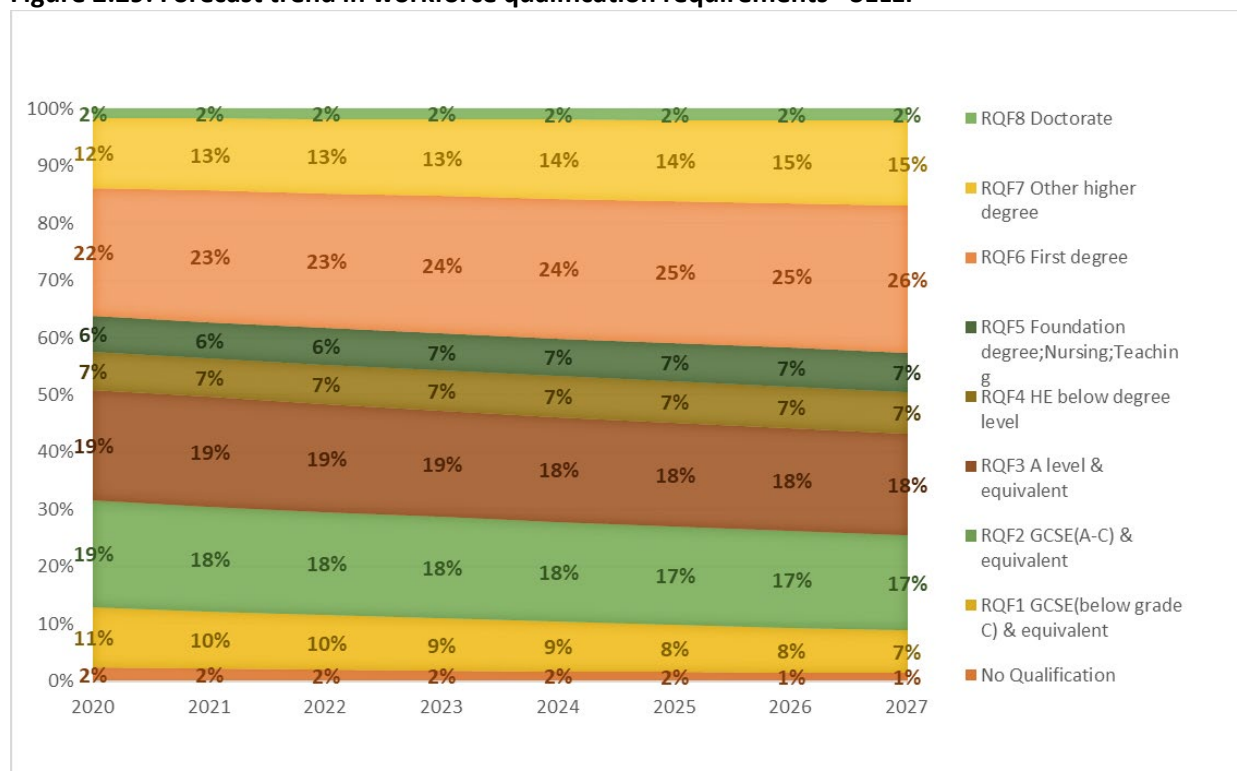
Fig 2.28 Employment by Qualification level

Standard Occupations SOC 2010	L4+	L3	L2	L1 or below
11 Corporate managers	56%	19%	14%	10%
12 Other managers	48%	19%	19%	14%
21 Science, eng. & tech profs	73%	13%	9%	6%
22 Health professionals	80%	10%	7%	4%
23 Teaching & ed profs	92%	3%	3%	2%
24 Busn, media & public profs	76%	12%	7%	5%
31 Sci, eng & tech assoc. profs	57%	19%	14%	11%
32 Health & care assoc profs	75%	11%	9%	5%
33 Protective service occs	45%	22%	21%	12%
34 Culture, media & sports	70%	16%	8%	7%
35 Busn & public assoc profs	57%	19%	15%	10%
41 Admin occupations	41%	21%	24%	14%
42 Secretarial & related	33%	20%	25%	22%
51 Skilled agric & related	31%	16%	24%	29%
52 Skilled metal, elec & electronic	19%	43%	24%	14%
53 Skilled construction	11%	38%	31%	20%
54 Textiles, print & othr skilled	20%	28%	25%	27%
61 Caring personal service occs	34%	34%	26%	6%
62 Leisure, travel & personal service	29%	28%	25%	18%
71 Sales occupations	24%	28%	27%	22%
72 Customer service occs	34%	25%	26%	15%
81 Process, plant & machine	12%	27%	31%	30%
82 Transport & machine ops	14%	23%	30%	33%
91 Elementary trade occs	12%	20%	27%	40%
Total	17%	20%	30%	33%

Source: DfE Working Futures 2017-2027. SELEP workbook.

The DfE Working Futures model also suggests that the trend towards increasing qualification requirements in many occupations will continue. Figure 2.29 (below) shows that **the proportion of the workforce with a first degree is expected to increase from 23% to 26% and with a further degree from 12% to 15% whilst the proportion requiring qualifications at level 1 or below will fall from 13% to 8%.**

Figure 2.29: Forecast trend in workforce qualification requirements - SELEP



Source: DfE Working Futures 2017-2027. SELEP workbook.

2.7 Local Stakeholder Views on Economic Needs

Figure 2.30 (below) summarises the key sector skills needs and significant developments in each of the East Kent Districts and Boroughs, based on interviews with lead economic development officers. A full account of each District or Borough's current position in terms of key economic and community issues and priorities can be found in Annex 1.

Figure 2.30: Summary of District / Borough

Ashford	<ul style="list-style-type: none"> Manufacturing Retail and wholesale Visitor / experience economy (including viticulture) Health and social care Creative and cultural / Digital Tech Employability Re-training
Canterbury	<ul style="list-style-type: none"> Manufacturing Creative and cultural / digital tech Development and construction Health and social care Agriculture and horticulture / food Transport and logistics Entrepreneurship and business management
Dover	<ul style="list-style-type: none"> Manufacturing Creative and cultural / digital tech (Tech Fort) Life sciences (Discovery Park) Transport and logistics (including port activities) Visitor / experience economy
Folkestone and Hythe	<ul style="list-style-type: none"> Development and construction Health and social care Transport and logistics Creative and cultural / digital tech Re-training Enterprise and 'adaptability'
Swale	<ul style="list-style-type: none"> Visitor / experience economy Retail and wholesale Development and construction Agriculture and horticulture / food Transport and logistics Manufacturing Re-training (inc IT and digital skills for adults) More vocational opportunities for young people Entrepreneurship and business management
Thanet	<ul style="list-style-type: none"> Creative and cultural / digital tech Visitor / experience economy Energy, utilities and environmental technologies Re-training Enterprise and entrepreneurship Customer-related skills

Source: depth interviews conducted with senior officers in each Local Authority February / March 2021.

It should be noted that all Local Plans envisage high levels of house building in the coming years. Taken with the pipeline of major infrastructure and other projects, this is expected to lead to high levels of demand for construction skills.

Taken together, the local priorities indicate that prioritisation should be considered by EKC Group for the following KMEP priority sectors⁸:

- **Manufacturing**
- **Visitor / experience economy**
- **Creative and cultural / digital tech**
- **Development and construction**
- **Health and social care**
- **Transport and logistics**
- **Agriculture and horticulture / food / viticulture** (can link to the visitor / experience economy)

The local authorities also highlighted a number of more generic or 'cross-cutting' skills requirements that arise from economic needs:

- **Employability skills**
- **Re-training for adults**
- **Entrepreneurship and business management (including self-employment)**
- **IT and digital skills**
- **Customer-related skills**

These identified needs reflect a number of issues that apply across some or all of the local authority areas. Firstly, **employability skills** are needed by those who are farthest from the labour market. These are in part to do with attitudes, behaviours and communication, but would also include essential skills like English and Maths. This requirement is often seen as being relevant to many young people and to more deprived communities.

Secondly, **re-training for adults** is seen as a priority because of the need for people to re-direct their working lives after the 'shake out' brought about by Covid, but also by wider, long term structural change in employment.

Thirdly, **entrepreneurship and business management** skills are considered to be a growing need for a number of reasons. Self-employment seems to be growing and may even be 'required' at times in some sectors (Swale cited hairdressing as an example of this). So people need to know about their legal responsibilities and how to manage themselves as a business. A further issue is that business start up is expected to grow following pandemic-related redundancies and an apparent trend for people to 'localise' more their working lives or re-locate to places like East Kent. Finally, employment growth will in large part depend on existing businesses being able to scale up, and business owners with a craft, technical or professional skill may lack the management skills to do this.

⁸ Creative and cultural, and digital tech are presented together, given how closely integrated and, to some extent interchangeable, the two sectors are.

Fourthly, **IT and digital skills** are seen as being increasingly indispensable, especially since the growth of flexible working and the growth of packages like Office 365 and all it has to offer, as well as the increasing digitisation of all sectors of the economy.

Finally, **customer-related skills** are considered to be the lynchpin of the burgeoning visitor / experience economy and important to all sectors more generally.

Local authorities also highlighted the important role that FE can play in helping to make a success of key local projects as they evolve in the coming years, where the skills need may be more specialised and involving lower volumes. Examples of such opportunities include Newtown Works, Ashford (where EKC Group is already fully engaged) and Discovery Park and Tech Fort, Dover. Manston is also seen as a key local project potentially, whatever the outcome of the current review and the eventual use of the site.

A theme running through all local authority planning and their understanding of the local business environment and national policy priorities is a much stronger focus on **sustainability and 'net zero'** (carbon emissions) in the coming years. This will have profound effects on all sectors of the economy and skills, and will impact on multiple curriculum areas including skilled trades (eg construction, equipment installation and maintenance, transport and logistics) and usually increase the need for related digital skills. This theme could also increase demand for skilled workers in many sectors and specialisms.

County Stakeholders

Senior officers from KCC and Locate in Kent largely also recognised the needs identified by the Districts and Boroughs, but also added the following perspectives:

KCC are looking for further transformative, 'game changing' major projects to be brought forward within Kent, including East Kent. The main potentially transformative projects already identified would include Newtown Works and Manston (whether as an airport of perhaps some kind of 'new town').

The Council is also keen to see a cultural transformation in terms of entrepreneurship and enterprise, with more people starting and growing businesses, and East Kent unlocking its potential in the process. This is considered to be especially important given the relative paucity of large employers and the 'leakage' of many skilled people out of the area, whether as commuters or in terms of relocation.

Locate in Kent singled out life sciences / STEM, film / TV, logistics and construction as priority sectors, and also felt that the hotel sector will grow, despite the current hiatus in investment. They expect there will be high-end, niche hotels (50 or fewer rooms) that will require specialist skills and experience in a number of areas, and also big new hotels in Dover, Canterbury and Folkestone. There was also a concern that manufacturing growth may be impaired by Brexit.

They also recognised the opportunities to grow business start-ups and scale-ups that may emerge post-Covid, as well as there being a need for East Kent to 'grow its own' jobs in this way in an uncertain inward investment climate.

As well as entrepreneurship skills, basic business and management skills play an important role. Through its 'Future Forward' programme to support growing businesses, LiK found evidence of 'Square Wheel Syndrome' – businesses that carry on sub-optimally, feeling that they lack the time to switch the square wheels for round ones. Developing business and

management skills in companies is a sound intervention in this sense and creates development opportunities for existing staff, which may also aid retention.

3. Community Needs Analysis

This section considers social and community needs for skills and qualifications in East Kent. It covers the socio-economic needs of the community, in the sense that residents need skills and qualifications to support their engagement in the labour market and ensure their economic wellbeing. It also explores some of the drivers behind the demand for Further Education from young people, given population projections and trends in school leaver destinations.

Summary

Community profile: East Kent has a resident population of around 819,000 people, of whom 490,000 are working age (16-64).

- Like many coastal areas, it has a higher proportion of retirement age residents than the national average and fewer working age residents.
- In the 2011 Census 5% of East Kent residents were identified as being from a Black, Asian, or Minority Ethnic (BAME) background.
- 23% of working age people in East Kent have a disability, the local proportion varying from just 15% in Ashford to 35% in Thanet.

Unemployment and economic inactivity: there are significant challenges in terms of unemployment and economic inactivity:

- 33,000 people were unemployed in East Kent in January 2021. A further 97,000 were economically inactive, of whom over 13,000 would like a job.
- Claimant count unemployment on this measure varies significantly between East Kent Districts: that in Thanet in January 2021 was double that of Canterbury, for example.
- Economic inactivity rates for working age people are also higher than the national average in three of the six East Kent Districts.
- Unemployment has increased sharply during the Covid pandemic, with more than one in ten young people unemployed in five of the six East Kent Districts.

Social needs: there are major social challenges to be addressed:

- 96,000 East Kent working age residents are on benefits, including 25,000 people on Universal Credit in work. The picture varies by local authority area, but Thanet has the highest level of people on benefits.
- There are 25,000 children living in low-income families in East Kent, and the proportion of children in low-income families is higher than the average for the South East region in all six East Kent Districts.
- There are also significant pockets of deprivation: four of the six East Kent Districts are in the bottom quartile nationally in terms of the Employment deprivation measure.

The resident qualifications profile is poor compared with GB as a whole:

- Fewer residents have qualifications at level 3 or above (54% compared with 57%)
- Significantly fewer have qualifications at level 4 or above (32% compared with 40%).
- 40,000 East Kent residents have no qualifications at all.

Young People: the likely need for Further Education is growing:

- Following a period of contraction, the number of 15-19 year olds is expected to significantly increase over the next 5-7 years. By 2028 there will be around 20% more 15-19 year olds across Kent & Medway than now, an increase of nearly 10,000 potential students across East Kent, with the highest growth in Ashford.

In 2019, around 2,500 East Kent young people per year went into FE after Year 11. About 215 went into employment with training. 4,500 Year 11s stayed in school. For the first time since 2014, the number of leavers going into Further Education increased with the number going into V1th form declining slightly.

Young people with SEND: based on KCC's draft *Strategy for Children and Young People with SEND 2021-24*, it seems likely that the need for services in this area will increase, at least in the short term. It also seems that commissioning will focus on outcomes such as improved transitions between one form of provision and another, improved attainment (including Level 2 and 3 qualifications), and reduced exclusions and higher levels of attendance.

Local stakeholder views on community needs of relevance to FE tended to focus on four broad areas:

In overview, the key community needs that stand out are:

- Population growth, driven by house building, which will increase demand for all public services, including Further Education.
- Deprivation, which creates locally specific needs for actions which improve people's employability and raise skills and qualifications levels, while also aiding social inclusion and wellbeing.
- The revitalisation of town centres, due to the impact of Covid but also because of longer term structural changes.
- People re-locating to East Kent raise both opportunities and challenges. They include people in care and looked-after children, people in need of housing from London Boroughs, as well as professionals working flexibly or re-locating out of London.

Given that education and skills is seen as a bridge to employment and improved labour market prospects, many of these community challenges also tend to be linked by stakeholders to some of the skills needs identified earlier, in areas like employability, essential skills, re-training and skills of relevance to key economic sectors.

3.1 Community Profile

East Kent has a **resident population** (see Figure 3.1 below) of around **819,000 people**, of whom **490,000 are working age (16-64)**.

Fig: 3.1 East Kent Population

	East Kent	K&M
All people	819,000	1,860,000
<i>Males</i>	<i>402,000</i>	<i>915,000</i>
<i>Females</i>	<i>417,000</i>	<i>945,000</i>
All people aged 16-64	490,000	1,129,000
<i>Males</i>	<i>243,000</i>	<i>560,000</i>
<i>Females</i>	<i>247,000</i>	<i>569,000</i>

Source: ONS Mid-year population estimates 2019.

Figure 3.2 (below) highlights that **East Kent, like many coastal areas, has a higher proportion of retirement age residents than the national average and fewer working age residents**, particularly those aged 25-64. The proportion of young people is closer to the national average.

Fig 3.2 Age profile benchmarked

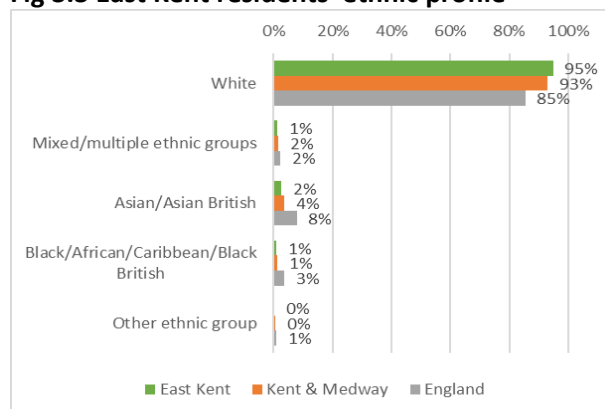
	East Kent	Relative to GB	More or less than expected?
0-15 years	150,300	97%	-4,800
15-19 years	46,200	103%	+1,500
20-24 years	51,700	101%	+800
25-29 years	50,400	91%	-4,600
30-64 years	342,055	95%	-17,500
Aged 65+	177,902	117%	+30,100

Source: ONS Mid-year population estimates 2019.

Ensuring equality of access to skills, qualifications to support equality of opportunity in the labour market is also a key component of the social and community demand for Further Education.

It is now 10 years since the last census, and Census 2021 may highlight some changes, but in 2011, **5% of East Kent residents were from a Black, Asian, or Minority Ethnic (BAME) background** (Fig 3.3).

Fig 3.3 East Kent residents' ethnic profile



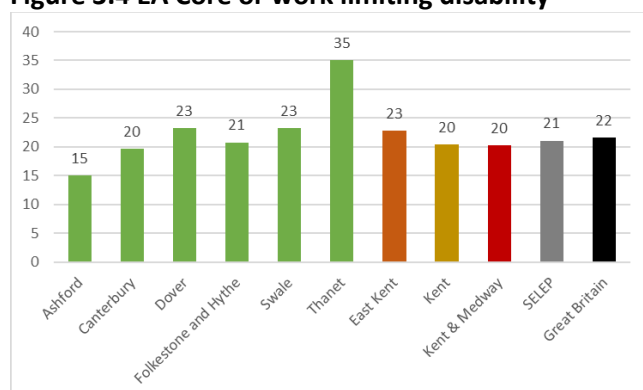
Source: ONS Census 2011.

This was slightly lower than the proportion for Kent and Medway as a whole, and significantly lower than the England average (15%).

In the Office for National Statistics (ONS) Annual Population Survey, **23% of working age people in East Kent report that they have a core disability** in terms of the Equality Act (EA) or some other work limiting disability (21% report that they have a core disability). Equality Act Core disabled includes those who have a long-term disability which substantially limits their day-to-day activities. Work-limiting disabled includes those who have a long-term disability which affects the kind or amount of work they might do.

Figure 3.4 (below) shows that **the proportion of residents reporting that they have a disability varies significantly between Districts, from just 15% in Ashford to 35% in Thanet**. The average for East Kent is slightly higher than for Kent & Medway.

Figure 3.4 EA Core or work limiting disability



Source: ONS APS Oct19-Sep20

3.2 Unemployment & Economic Inactivity

Unemployment and economic inactivity, particularly where residents would like work, are also potential signs of a need for re-skilling or upskilling in the community. Figure 3.5 shows that over **33,000 people were unemployed in East Kent in January 2021**. A further **97,000 were economically inactive, of whom over 13,000 would like a job**.

Fig 3.5 Unemployment and economic inactivity

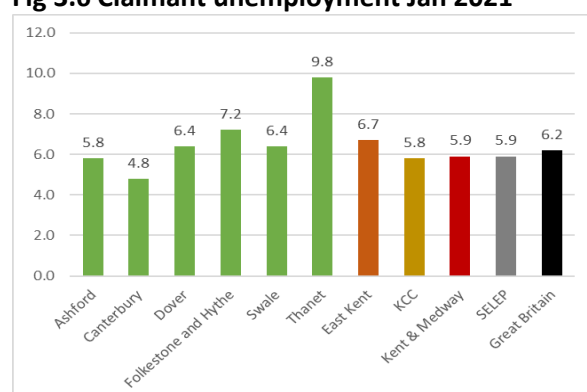
	East Kent (numbers)	East Kent (%)	K&M (%)
Unemployment aged 16-64	33,525	6.8	6.1
Economically inactive	97,000	20	20
<i>Of whom: want a job</i>	<i>13,500</i>	<i>14</i>	<i>15</i>

Source: ONS Claimant Count Jan21, APS Economic Inactivity Oct19-Sep20

This measure of claimant unemployment is a new experimental statistic from the Office for National Statistics, that counts the number of people claiming Jobseeker's Allowance plus those who claim Universal Credit and are required to seek work and be available for work.

Figure 3.6 shows that **claimant unemployment on this measure varies significantly between East Kent Districts**. The unemployment rate in Thanet in January 2021 was double that of Canterbury District.

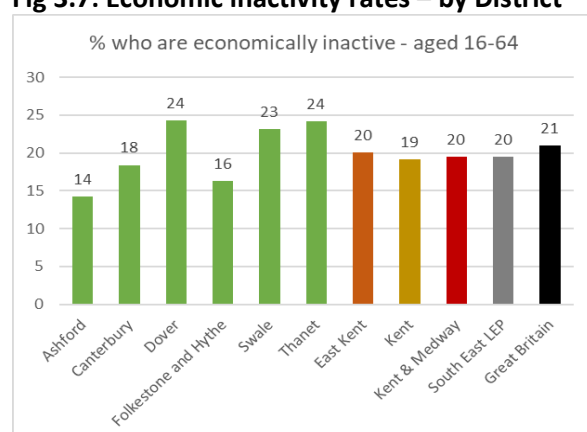
Fig 3.6 Claimant unemployment Jan 2021



Source: ONS Claimant Count Jan21

In 2020 (the latest date for which figures are available) **economic inactivity rates for working age people were also higher than the national average in three of the six East Kent Districts**.

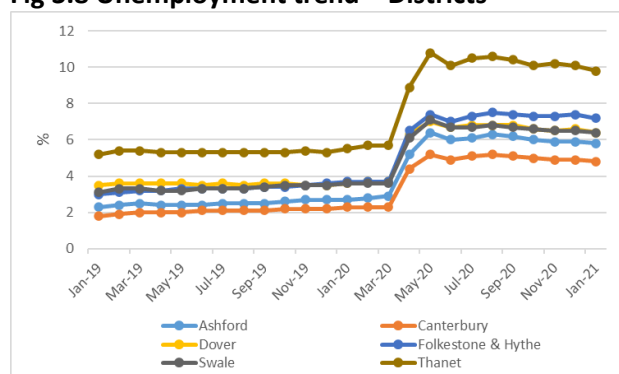
Fig 3.7: Economic inactivity rates – by District



Source: ONS APS Oct19-Sep20

Figure 3.8 shows that claimant unemployment rates increased sharply across all East Kent Districts as the COVID-19 pandemic took hold between March and May 2020.

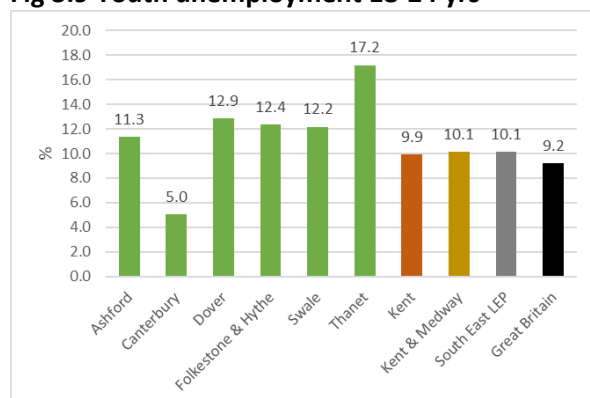
Fig 3.8 Unemployment trend – Districts



Source: ONS Claimant Count

Around 20% of the claimant unemployed are aged 18-24 but they are more likely than other age groups to be unemployed. In October 2020, **more than one in ten young people was unemployed in five of the six East Kent Districts** (Fig 3.9).

Fig 3.9 Youth unemployment 18-24 yrs



Source: ONS Claimant count by age, Oct 2020 (KCC Strategic Commissioning - Analytics team).

3.3 Social Needs

Wider socio-economic deprivation in a community is also a potential indicator of the need for new skills and employment, as well as other potential social and economic interventions. It can also highlight under employment, residents who can't get as much work as they want and/or are in low skilled and low paid employment.

Figure 3.10 highlights that **96,000 East Kent working age residents are on benefits, including 25,000 people on Universal Credit (UC) who are in work.**

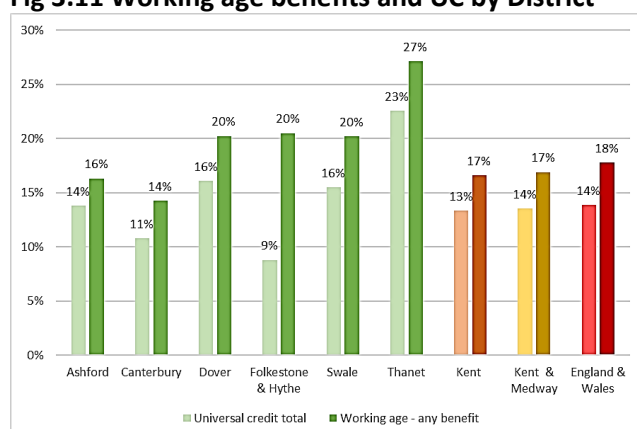
Fig 3.10 Out of work benefits

East Kent claimants	
Universal credit total*	72,000
Universal credit (in work)*	25,000
Universal credit (not in work)*	46,000
Income Support - (% 16-59 Population)	4,000
Job Seekers Allowance	2,000
Employment & Support Allowance (ESA)	22,000
Working age - any benefit	96,000

Source: KCC Strategic Commissioning - Analytics, based on DWP data Feb 2020, or *Aug 2020. Figures rounded to the nearest 1,000

The proportion of working age residents on benefits also varies significantly by District (Fig 3.11).

Fig 3.11 Working age benefits and UC by District



Source: KCC Strategic Commissioning - Analytics, based on DWP data Aug 2020

It is not clear why take up of Universal Credit is lower than average in Folkestone & Hythe. It is possible that this may be more related to the roll out of the UC benefit scheme than the level of local needs.

Figure 3.12 shows that there are over **25,000 children living in low income families in East Kent**.

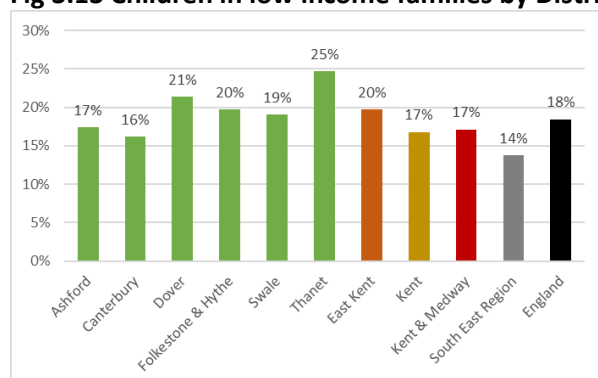
Fig 3.12 Children in Low Income families

	East Kent	East Kent %	Kent & Medway %
Children living in low income families (absolute)	25,741	17%	15%
Children living in low income families (relative)	29,389	20%	17%

Source: KCC Strategic Commissioning - Analytics, based on DWP data

Absolute low income is defined as a family in low income before housing costs in the reference year, in comparison with incomes in 2010/11. Relative low income is defined as a family in low income before housing costs in the reference year. Figure 3.13 highlights that **the proportion of children in low income families is higher than the average for the South East region in all six East Kent Districts**.

Fig 3.13 Children in low income families by District



Source: KCC Strategic Commissioning - Analytics, based on DWP data

More generally, the (most recent) 2019 Index of Multiple Deprivation (IMD) suggests that **four of the six East Kent Districts are in the bottom quartile nationally in terms of the Employment deprivation measure.**

Fig 3.14: Index of Multiple Deprivation 2019

	IMD	Income	Employment	Education, Skills and Training
Ashford	48%	46%	54%	37%
Canterbury	58%	58%	62%	59%
Dover	34%	29%	21%	35%
Folkestone and Hythe	26%	21%	15%	26%
Swale	22%	24%	22%	13%
Thanet	11%	8%	4%	12%
Kent	63%	64%	63%	46%

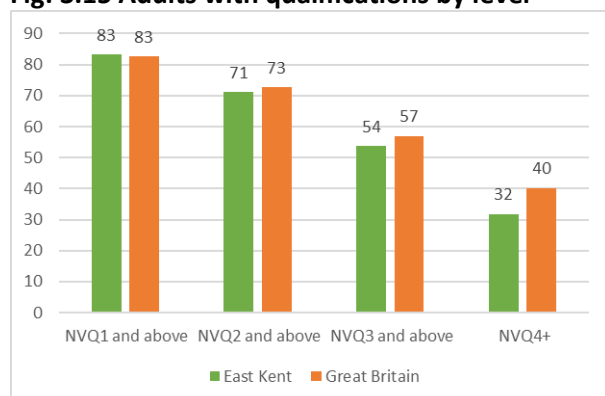
Source: English Indices of Deprivation 2019: Ministry of Housing, Communities & Local Government (MHCLG). Quartile scores based on District/County rank of average Lower Super Output Area ranks.

Each measure in the IMD summarises several statistical indicators for very small geographical areas with roughly equal populations. The Education, skills and training measure, for example, includes measures of the proportion of 16 year olds staying on in education, the proportion of young people entering Higher Education and an indicator of adult qualification levels and English language proficiency.

3.4 Adult Skills and Qualifications

Figure 3.15 highlights that most adults (83%) in East Kent have at least level 1 qualifications and in this respect the area is no different to Great Britain as a whole. However, **fewer residents have qualifications at level 3 or above (54% compared with 57% GB) and significantly fewer have qualifications at level 4 or above (32% compared with 40% GB).**

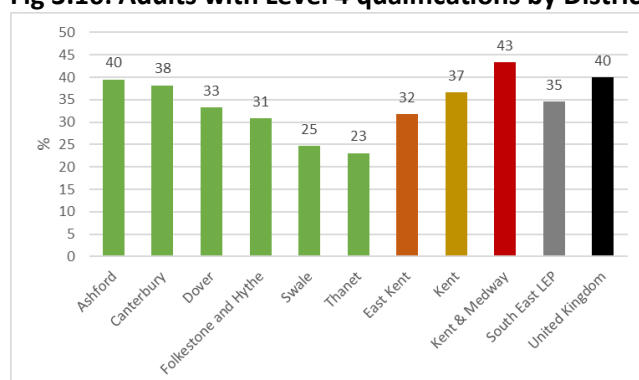
Fig: 3.15 Adults with qualifications by level



Source: ONS APS Jan19-Dec19

The proportion of residents with level 4 + qualifications is particularly low in Swale and Thanet (Fig 3.16)

Fig 3.16: Adults with Level 4 qualifications by District



Source: ONS APS Jan19-Dec19

However, improving qualification levels at level 3 may also support better employment outcomes for local residents. Figure 3.17 highlights that over 57,000 working age Kent residents only have a level 1 qualification and a further **40,000 have no qualifications at all.**

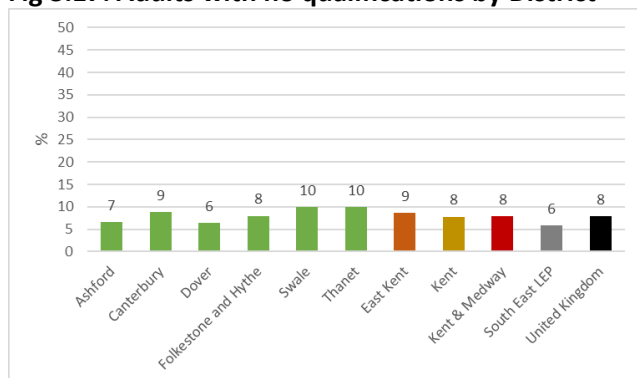
Fig 3.16: Highest qualification obtained

Highest qualification	East Kent	
	East Kent	%
Level 4	153,100	32%
Level 3	108,700	23%
Level 2	87,900	18%
Level 1	57,600	12%
Other	33,800	7%
None	40,300	8%
Total aged 16-64	481,400	100%

Source: ONS APS Jan19-Dec19

The proportion of working age residents with no qualifications is also slightly higher in Swale and Thanet.

Fig 3.17: Adults with no qualifications by District



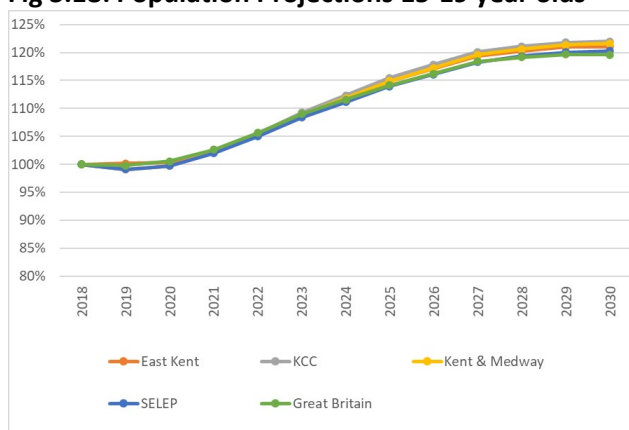
Source: ONS APS Jan19-Dec19

3.5 Young People

Equipping young people with the relevant skills and qualifications to enter the labour market for the first time is also a key social and economic need for Further Education. In recognition of this, vocational education for young people also attracts significant government funding.

Demographic trends in the number of 16-19 year olds and trends in the destination choices of 16 year old students in Year 11 are key determinants of the annual demand for Further Education. Figure 3.18 shows that, **following a period of contraction, the number of 15-19 year olds is expected to significantly increase over the next 5-7 years. By 2028 there will be around 20% more 15-19 year olds across Kent & Medway than there are now.**

Fig 3.18: Population Projections 15-19 year olds



Source: ONS Population Projections 2018

This is equivalent to **an increase of nearly 10,000 potential students across East Kent** (Figure 3.19)

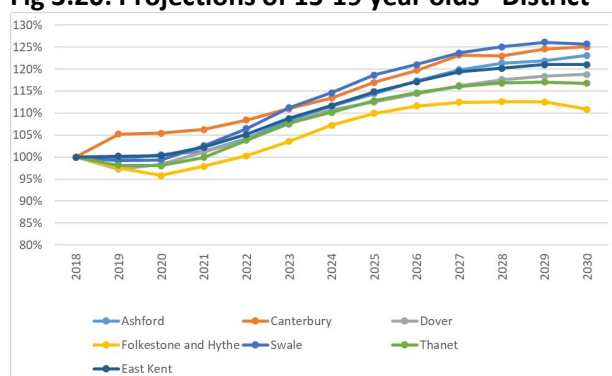
Fig 3.19: Population Projections 15-19 year olds

	Ashford	Canterbury	Dover	Folkestone and Hythe	Swale	Thanet	East Kent
2018	7,300	12,200	6,000	5,500	8,200	7,600	46,900
2019	7,300	12,900	5,900	5,400	8,200	7,400	47,000
2020	7,400	12,900	5,900	5,300	8,200	7,400	47,100
2021	7,400	13,000	6,100	5,400	8,400	7,600	47,900
2022	7,600	13,300	6,300	5,600	8,800	7,900	49,300
2023	7,900	13,600	6,500	5,700	9,200	8,100	51,000
2024	8,200	13,900	6,700	5,900	9,400	8,300	52,400
2025	8,400	14,300	6,800	6,100	9,800	8,500	53,900
2026	8,600	14,600	6,900	6,200	10,000	8,700	54,900
2027	8,800	15,100	7,000	6,200	10,200	8,800	56,000
2028	8,900	15,000	7,100	6,200	10,300	8,800	56,400
2029	8,900	15,200	7,100	6,200	10,400	8,900	56,800
2030	9,000	15,300	7,100	6,100	10,300	8,800	56,800

Source: ONS Population Projections 2018

Proportionally, the **increase in 15-19 year olds is expected to be greatest in Ashford** (+25% or +2,700 by 2028) but lower in Folkestone and Hythe (+12% or +600 young people).

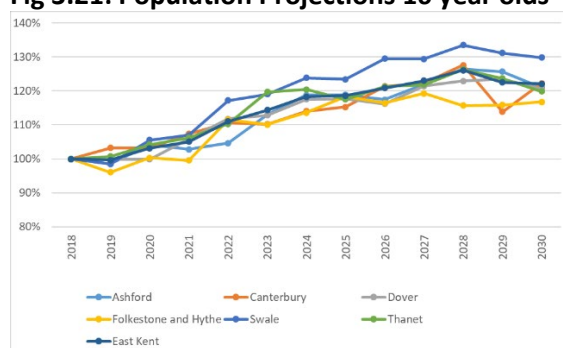
Fig 3.20: Projections of 15-19 year olds - District



Source: ONS Population Projections 2018

Changes in the proportion of 16 year olds (future Year 11 leavers) are expected to follow a similar pattern (Fig 3.21), although as single age cohorts are smaller, there is more natural year to year variation.

Fig 3.21: Population Projections 16 year olds



Source: ONS Population Projections 2018

Figure 3.22 highlights that **in recent years around 2,500 young people from East Kent have gone into Further Education after Year 11**. The table groups FE and HE together but very few Year 11 students go into higher education.

Fig 3.22: Y11 Leavers into FE/HE by District

	2015	2016	2017	2018	2019	
Ashford	291	305	363	384	389	
Canterbury	435	388	385	374	414	
Dover	402	362	430	390	397	
Folkestone	287	327	374	295	320	
Swale	478	495	455	405	519	
Thanet	592	631	581	531	515	
East Kent	2,485	2,508	2,588	2,379	2,554	
Rest of Kent	2,221	2,127	2,161	2,150	2,286	
Kent	4,706	4,635	4,749	4,529	4,840	

Source: KELSI Facts and Figures. Kent School Leavers Destinations Survey July 2015-19. Figures do not include Medway

In 2019, an additional 215 Year 11 leavers went into employment with training (including apprenticeships), some of which will have been supported by East Kent College group.

Fig 3.23 Y11 Leavers into Employment with training

	2015	2016	2017	2018	2019	
Ashford	61	59	63	47	49	
Canterbury	34	46	43	59	51	
Dover	41	47	45	28	31	
Folkestone	46	36	43	36	31	
Swale	65	57	75	105	71	
Thanet	36	48	67	35	31	
East Kent	222	234	273	263	215	
Rest of Kent	278	304	334	281	265	
Kent	500	538	607	544	480	

Source: KELSI Facts and Figures. Kent School Leavers Destinations Survey July 2015-19. Figures do not include Medway

Some 4,500 Year 11 leavers opted to stay in school in 2019.

Fig 3.24: Y11 leavers into V1th form

	2015	2016	2017	2018	2019	
Ashford	1,003	971	816	819	814	
Canterbury	904	925	949	989	986	
Dover	707	719	691	725	669	
Folkestone	750	724	499	550	581	
Swale	922	941	837	877	793	
Thanet	800	797	673	725	674	
East Kent	5,086	5,077	4,465	4,685	4,517	
Rest of Kent	4,974	4,835	4,936	4,876	5,080	
Kent	10,060	9,912	9,401	9,561	9,597	

Source: KELSI Facts and Figures. Kent School Leavers Destinations Survey July 2015-19. Figures do not include Medway

However, the figures from the Kent School Leavers Destinations survey highlight that in 2019, for the first time since 2014, the number of leavers going into Further Education increased with the number going into V1th form declined slightly.

3.6 Kent's Strategy for Children and Young People with Special Educational Needs and Disabilities 2021-2024

KCC's consultation on its draft SEND strategy⁹ closed in February 2021, with the final document expected later in the year. While the time period is short relative to the Curriculum 2030 planning horizon, the document gives the best indication currently available of community needs in this specific area of public services.

⁹ <https://kccconsultations.inconsult.uk/consult/ti/sendstrategyconsultation/consultationHome>

The draft strategy identifies the following five priorities:

Priority One: Improve the way we work with children and young people, parents and carers.

Priority Two: Ensure children, young people and their families have positive experiences at each stage of their journey including a well-planned and smooth transition to adulthood.

Priority Three: Identify and assess the needs of children and young people earlier and more effectively.

Priority Four: Improve education, care and health outcomes for children and young people with SEND.

Priority Five: Ensure children and young people with SEND are included in their local community.

It seems likely that the need for services for children and young people with SEND will grow in coming years. While the draft strategy does not forecast anticipated volumes of children and young people with SEND, the document does show that the numbers of such students grew from 32,325 to 36,900 between 2017/18 and 2019/20 (12.9% and 14.5% of the overall school-age population respectively). The anticipated growth in the school-age population overall would suggest that this will grow further in the coming years.

Of the 7 specified outcomes that the strategy seeks to deliver for children and young people (see Figure 3.25 below), Outcome 5 relates specifically to the outcomes for school, college and work, and which might be expected to guide commissioning of services. The list includes a positive experience of **transition** from one form of provision to another; **improved attainment** on a number of measures, including Level 2 and Level 3 qualifications; and **fewer exclusions and increased attendance**.

Figure 3.25: KCC Draft SEND Strategy (2021) – Outcome 5

- Outcome 5: Children and young people are the best they can be at school, college or work**
Children and young people tell us that:
- children and young people with SEND experience well planned transitions at all stages of their education
 - children and young people's experience of transitions between phases of education and education placements are positive ensuring that progress, well-being and outcomes are maintained
 - an increased proportion of children with SEND achieve a Good Level of Development at the end of the Early Years Foundation Stage
 - the gap in attainment between those children with SEND and those with no SEND has narrowed
 - an increased proportion of children with SEND achieve the expected standard in Reading, Writing and Maths at the end of KS2
 - the Attainment 8 and Progress 8 scores of young people with SEND show a sustained improvement
 - there is a sustained increase in young people with SEND achieving L2 and L3 qualifications
 - there is a reduction in the proportion of children and young people with SEND who receive Fixed Term Exclusions
 - more children and young people with SEND attend school regularly
 - less children and young people with SEND are on reduced timetables.

Source: <https://kccconsultations.inconsult.uk/consult.ti/sendstrategyconsultation/consultationHome>

3.7 Local Stakeholder Views on Community Needs

Annex 1 of this report gives a summary of the main community needs for each East Kent District / Borough. In overview, the key community needs that stand out are:

- **Population growth** in all areas, driven by house building. This is expected to increase demand for all public services, including Further Education.
- **Deprivation** affects individual parts of each local authority area, creating locally specific needs for actions which improve people's employability and raise skills and qualifications levels, while also aiding social inclusion and wellbeing.
- The **revitalisation of town centres** is a common theme across all area, due to the impact of Covid but also because of longer term structural changes. The role of FE in town centre revitalisation is one for EKC Group to reflect on, building up existing work in localities like Margate.
- **People re-locating to East Kent** raise both opportunities and challenges, and include people in care and looked-after children, people in need of housing from London Boroughs, as well as professionals working flexibly or re-locating out of London.

Given that education and skills is seen as a bridge to employment and improved labour market prospects, many of these community challenges also tend to be linked by stakeholders to some of the skills needs set out in section 2 of this report, in areas such as employability, essential skills, re-training and skills of relevance to key economic sectors.

4. Key Conclusions

This report has reviewed the key dimensions of economic and community demand for Further Education services in East Kent using a wide range of data sources and taking into account the views of a range of key stakeholders.

In terms of curriculum planning the key conclusions that can be drawn from the analysis are as follows:

1. EKC Group's offer needs to address the needs of the whole of the East Kent economy to the extent that is feasible, but with particular focus on the following sectors:
 - a. **Those which account for most employment¹⁰:** health, retail, accommodation and food, business administration and support and manufacturing.
 - b. **Those with the highest levels of employment growth:** which are development and construction; and professional, science and technical services.
 - c. **Sector priorities identified by local stakeholders,** ie: manufacturing; visitor / experience economy (including hotels); creative and cultural / digital tech; development and construction; health and social care; transport and logistics; and agriculture / horticulture / food / viticulture.
2. The Group's offer could also help people to access **occupations with the highest numbers of new entrants required**, the three largest of which are care staff, corporate managers and business and public service associate professionals.
3. There are also **cross-cutting skills needs** across the whole economy, which are employability skills (including essential skills); re-training for adults; entrepreneurship and business management; IT and digital skills; and customer-related skills.
4. There is also a need to respond to **major projects**, such as Newtown Works
5. Needs also arise from major cross-sectoral developments, in particular the drive for **sustainability and 'net zero'** and **digitalisation**.
6. Curriculum could also play a role in **addressing East Kent social challenges**, such as high levels of unemployment and economic inactivity; poverty (as evidenced by take up of state benefits and low income families); deprivation in specific areas of East Kent; and poor levels of educational attainment in parts of the community.
7. The volume of programmes on offer is likely to need to increase, given an **anticipated increased in demand for FE**, arising from a growth in the Year 11 population in the coming years. This may also include an increased need for FE for young people with SEND.

¹⁰ Education accounts for 11% of employment, but has not been included given its specialist nature.

Annex 1: Summary of Individual Local Authority Key Economic and Community Issues and Priorities

Stakeholder	Ashford Borough Council
State of Play	<p>The Local Plan¹¹ was adopted two years ago, and sets out the land position to 2030. The Plan will be reviewed in the coming years. The housing position is settled now for the years ahead and will drive housing and population growth. There are challenges around commercial space, with Sevington / Stour Park / MoJo now earmarked as the new inland border facility and animal checking station. This will create around 500 jobs, but not as many as originally envisaged through industrial activities. It is hoped that further new employment sites will be added in the coming years. Developments such as Eureka Business Park, the Commercial Quarter and Newtown Works, which are all in the Local Plan, will proceed. Waterbrook is now essentially delivered, at least from a planning perspective.</p> <p>Network Rail and Hitachi both have facilities in Ashford, and Network Rail has bought the old Bombardier site for sidings, and there may be other space there that could potentially be used for extra rail-related activity.</p> <p>A new Corporate Plan and a new Economic Development Strategy were being developed in 2020, but were overtaken by the Council's Recovery Plan¹², which has an 18-month time horizon and takes much of its strategic direction from the earlier work that had been done on the Corporate Plan in areas like carbon neutrality, delivering for the community and targeted growth. This is the best current source of the direction of travel for economic development. Coming out of Covid, the Council will re-start the corporate planning work and a new ED strategy (by about spring 2022) to sit alongside it. Targeted growth is one of the key elements of the ED strategy.</p> <p>Another key document with a bearing on skills demand is the forthcoming Ashford's Carbon Neutral Strategy¹³.</p>
Economy	<p>There are ambitious plans for growth, with 10,000 new jobs (20% growth) anticipated by 2030. However, existing businesses will drive most demand for skills. Coty, for example, has invested significantly and is using more robotics to double production with the same headcount, meaning fewer operative jobs but possibly a demand for more engineers.</p> <p>Within this bigger picture, discussions with the College have focused on its being involved in Newtown Works and delivering a new phase of the main college building at Elwick Road. The original plan for the new phase to offer trades and engineering (to replace what was at Jemmett Road) is still seen as a priority by the Council now.</p> <p>The local sector priorities in terms of skills are as follows:</p> <p>Manufacturing and advanced manufacturing: a key sector and will continue to be so, with some big employers and a high volume of employment overall. Skills here need to keep pace with the changing nature of manufacturing in areas like automation.</p> <p>Health and care: large in terms of job volumes, and including the William Harvey Hospital, which, if it retains its current status, will continue to be a key employer in the Borough. Care has also been growing and is likely to continue to do so, and it may be that the sector more widely grows in the coming years.</p> <p>Retail and hospitality will also continue to be important in Ashford. The Designer Outlet will grow further, with new retailers due to open there this year, creating new jobs and cementing the Outlet's position. Town centre retail is probably facing greater challenges.</p>

¹¹ <https://www.ashford.gov.uk/media/jw3nbvq1/adopted-ashford-local-plan-2030.pdf>

¹² <https://ashford.moderngov.co.uk/documents/s11850/Recovery%20Plan.pdf>

¹³ <https://www.ashford.gov.uk/your-council/carbon-neutral-agenda/>

	<p>The now-approved Ashford Town Centre Re-set¹⁴ document envisages more residential, less retail and hospitality, and consolidation of this into specific parts of the town centre. This may lead to fewer high street jobs, but this may be offset by a growth in logistics, most notably the 100,000sq ft logistics and 'last mile' delivery centre at Waterbrook.</p> <p>Creative and digital sector is a priority, ranging from the more artistic to the digital. Newtown Works and the growth of film are seen as key developments for the Borough. The Council and Locate in Kent have funded specific research to look into workforce and skills needs for Newtown Works. 'Made in Ashford', a scheme for start-up makers and craftspeople, and Coachworks are proving to be attractive to creative and digital companies which might eventually spread into the Commercial Quarter. Jasmin Vardimon's new Creative Laboratory at Henwood also has a surrounding area of industrial space which will be attractive to creatively oriented companies.</p> <p>The hotel sector could benefit from Newtown Works in terms of room occupancy, even though the onsite hotel is now unlikely to proceed). There is also a new 120-bed Hampton by Hilton being built next to Ashford International Station. A new 60-bed hotel opened at Elwick Place two years ago. Further growth in hospitality may be difficult, but the recent gains should be consolidated.</p> <p>One very specific area of growth is viticulture, which is as much part of the visitor economy ('Wine garden of England') as the landbased sector. Ashford has about 15 vineyards, including Chapeldown, Gusbourne, Biddenden, Egremont / Tattinger (4 out for the 'big seven'), plus Woodhurch and several smaller vineyards. These are a priority for Ashford. Although the jobs numbers are relatively low, it is hoped they can drive visitor numbers more generally.</p> <p>There could be a growing demand for office space driven by more flexible working patterns and a shifting of some activities out of London. Ashford has many sites, including Eureka, that could benefit from is a growth in inter-regional centres near major motorway junctions, for example.</p>
Community	<p>Ashford's population is expected to grow significantly, so there should be scope to grow learner numbers from the current 600 to around 1000, given that take up of FE is unusually low anyway.</p> <p>There are still some quite deprived areas in Ashford. There are many vulnerable learners and more challenged learners. Given an anticipated growth in unemployment post-Covid, this underlines the importance of meeting the needs of these learners and aiding their employability. This will be an ongoing challenge.</p>
Skills Priorities	<p>Manufacturing and Engineering, including advanced manufacturing¹⁵</p> <p>Retail and hospitality</p> <p>Health and care</p> <p>Creative and digital industries</p> <p>Employability</p> <p>Re-training</p>
Other	<p>The Council takes a very positive view of the new management of Ashford College, in particular the focus on making the curriculum more relevant to local needs, and to improving learning, teaching and quality.</p>

¹⁴ <https://ashford.moderngov.co.uk/documents/s12832/Town%20Centre%20Reset.pdf>

¹⁵ There is an existing industry base, which includes Coty, Givaudin and Premier Foods, and significant potential to expand the offer, potentially including higher / degree-level skills.

Stakeholder	Canterbury City Council
State of Play	<p>Local Plan review in progress, the last one having been adopted as recently as 2017. Originally intended to be a 'light touch' in nature, the review is actually assessing some more fundamental issues. getting into some more fundamental questions. A new study (not public domain) into Economy and Tourism sets out what is required to bring forward sufficient employment sites for the next twenty years.</p> <p>It is anticipated that the Local Plan review will identify that more sites for new housing will be needed and better ways to bring employment sites will be needed to speed up job creation. An 'issues and options' paper will be reviewed by Councillors shortly, and the policies will be reviewed, with a consultation draft Local Plan ready for early 2022.</p>
Economy	<p>There is no current sector focus in terms of economic development, but the following priorities may emerge from the Local Plan process:</p> <ul style="list-style-type: none"> • Renewables and environmental industries (eg Ryse Hydrogen in Herne Bay), even if large numbers of jobs are not created • Food and drink, from fruit growing to manufacturing, and supply chain • Construction • Specialised manufacturing • Business and professional services, including as a focus for town centres <p>In the short term, the priority is damage limitation and recovery from the pandemic. Unemployment is expected to grow further.</p> <p>Climate change is a major focus in the long term – embedding responses into the Council's own activities, but also embedding zero carbon in the wider economic outlook by, for example promoting green travel, promoting alternative fuels and energy sources, promoting the growth of green industries across all sectors.</p> <p>Another long-term driver is infrastructure: there are still many challenges that the District faces, including digital infrastructure (some areas have poor fixed line and mobile connectivity, including the city centre). 5G / Future Mobile is an opportunity, including for the visitor economy in that it creates opportunities to enhance the visitor experience through AR / VR to bring the history of the city to life, as has been done in York. Hard infrastructure is another long-term challenge, including the potential need for a by-pass and A2 junctions to help bring development sites forward in areas near to Wincheap, for example.</p> <p>Traditionally strong sectors, like retail and Higher Education seem unlikely to provide further jobs growth into the future.</p> <p>Key future sectors will include:</p> <p>Visitor economy and experience economy</p> <p>Science, digital and technology-based activities</p> <p>Health: any decision to consolidate more health services in Canterbury would have a major impact, and the Council would fight to maintain and grow such services in the District, especially given the planned housing expansion. The Medical School has also been a success and would be complementary.</p>
Community	<p>There will be significant population growth, with major urban extensions to Canterbury, creating whole new communities that need to be integrated into the life of the District will need to be integrated. Transport and community facilities are important in this respect, but there could also be a role for new education and training facilities, such as the one that the College is setting up at Hersden.</p>

	<p>The qualification profile of the District has improved significantly over the last decade, and the numbers of people with low / no qualifications has also fallen. However, there are still many people with low levels of attainment (worse than county as a whole) and this is an issue in terms of their employability and wider wellbeing.</p> <p>Population forecasts suggest that the numbers of young people may be declining at the moment but will grow again in the medium and longer term. The Council aims to ensure that the number of people of working age is kept high to support economic activity to support job creation. There is also a significant older and retired population, which will generate ongoing demand for care and other support services.</p> <p>London Boroughs have been relocating families down to East Kent, including Canterbury, without any support structures in place. If there is more of this, it could impact on social issues in the District, and so for curriculum development at the College.</p>
Skills Priorities	<p>The sector priorities that stand out for the coming years are:</p> <ul style="list-style-type: none"> • Engineering (links to the EDGE Hub included) • Digital and creative • Construction (housebuilding) • Health and care • Landbased and food (including viticulture, fruit and food processing) • Logistics (Canterbury is not a major hub in particular, but the sector is growing and creating jobs across East Kent) • Entrepreneurship and business management (given growing levels of self-employment and a possible need for more business start up and scale up) <p>There may also be a role for FE is responding to the 'Global Britain' agenda (eg language skills or responding to emerging growth opportunities).</p>
Other	<p>The change of management at Canterbury has dealt with the issues that required action. The Council would welcome closer working in future, as has traditionally been the case. Several years ago there was a Memorandum of Understanding between the two organisations that set out areas for collaboration, including promoting one another's work, apprenticeships, work placements, events and campaigns, construction skills tasters with employers, encouraging self-employment and entrepreneurship.</p> <p>The Council is also keen that the curriculum responds to local priorities, avoiding over-supply of programmes like hair and beauty, for example.</p>

Stakeholder	Dover District Council
State of Play	The Council consultation on the Local Plan ¹⁶ concludes in March 2021. This includes a new Economic Growth Strategy ¹⁷ . A Corporate Plan 2020-24 ¹⁸ was approved in February 2020. The new plans set out the priorities for the next 20 or so years, including housing growth and aspirations around future employment and quality of place.
Economy	<p>While Dover is felt to have many positive environmental qualities and good transport links, the pandemic has highlighted the challenges faced, including those of the town centres of Dover, Sandwich and Deal.</p> <p>Tourism and the visitor economy is seen as a key driver of employment growth and a dedicated strategy¹⁹ for this sector has been developed.</p> <p>Port activities are also expected to grow. Freight forwarding and customs used to be very large in Dover, and could now grow again through the inland border 66-acre facility for HMRC and Defra at White Cliffs Business Park. The scale of cross-channel activity is very large and will continue to be so. Port of Dover and Eurotunnel have developed a Free Port-related Council-supported proposal to become the 'smart strait' through digitisation and environmental enhancements. Another key development at the Port is the Western Dock expansion. Although this has been slow to start, the final outcome may be a destination similar to Gun Wharf Quays in Portsmouth or West Quay, Southampton. The main opportunities for Dover in this respect include growing the cruise market, leisure at the marina and Wellington Basin, and logistics growth.</p> <p>The green agenda more widely is also a priority for the Dover, in areas like low carbon and sustainability.</p> <p>Discovery Park is a longstanding supported major employment hub, where it is hoped science and technology can be strengthened. Prospects may be even better now, given the increased interest in an expanded UK life sciences and pharma capability.</p> <p>The draft Economic Development Strategy is based on five key 'themes' (creating economic value, delivering infrastructure for business, revitalising our town centres, harnessing White Cliffs country and a thriving rural economy). Under the economic value theme, there are four 'target activities' (secure Freeport status, the Accelerated Medicines Design and Development facility at Discovery Park, an accelerator initiative for high-value growth sectors, and inward investment). 7 major infrastructure projects are listed, including the proposed TechFort at Western Heights ('a cutting edge world-renowned innovation campus') and expanding employment at White Cliffs Business Park.</p>
Community	<p>There are a number of socially challenged wards in the District which would benefit from additional support in terms of education and skills.</p> <p>Retaining skilled people in the area is a further challenge, as many will travel out or move away to work.</p> <p>High streets and town centres are a particular concern now and the Council is looking to restore the towns' vibrancy and support business growth. Although the decline of retail may be permanent, there grow leisure and other business activities.</p>

¹⁶ <https://www.doverdistrictlocalplan.co.uk/the-local-plan>

¹⁷ <https://www.doverdistrictlocalplan.co.uk/uploads/pdfs/dover-economic-growth-strategy-2021.pdf>

¹⁸ <https://www.dover.gov.uk/Corporate-Information/Corporate-Plan.aspx>

¹⁹ <https://www.dover.gov.uk/Consultation/Tourism-Visitor-Economy-Strategy-Consultation/Destination-White-Cliffs-Country-Tourism-and-Visitor-Economy-Strategy-DDC-Consultation-Draft-November-2019.pdf>

Skills Priorities	<p>The following priorities stand out in terms of the needs of the District:</p> <ul style="list-style-type: none"> • Digital and technology • Discovery Park and Tech Fort • Logistics and related port activities • Tourism, hospitality and leisure
Other	<p>It is felt that a greater focus on the needs of the existing employers in the District, which may require more employer engagement. There is also a need to focus on the emerging and growing areas of the future.</p>

Stakeholder	Folkestone and Hythe District Council
State of Play	<p>Folkestone and Hythe's Local Plan²⁰ is going through its final examination now, with the new document expected to be in place by the end of 2021. The Economic Development strategy was due to be refreshed, but the immediate priority now is the recovery from Covid.</p> <p>While a new District-wide ED strategy is unlikely to be developed within the next few years, three place-specific plans will be developed:</p> <ul style="list-style-type: none"> • Otterpool Park, the new Garden Community (9,000 homes over 25 years): a bespoke economic plan and employment strategy for the construction phase and subsequently will be produced. • Folkestone Town Centre will also have its own Place Plan, which will consider economic opportunities, have a spatial plan, sites to be brought forward, including for work space. There will also be a focus on what services are needed in the town to help people access employment, such as employability training. • An Economic Plan for the Romney Marsh area. <p>The new Local Plan envisages 650 home completions per year in Otterpool, but also Folkestone town centre.</p>
Economy	<p>The main sector priorities are:</p> <ul style="list-style-type: none"> • Creative sector, including links to the EDGE at Folkestone College. • Tourism: this sector includes the wider 'experience economy'. The Council is working with Visit Kent to grow the experiential aspects of the visitor economy (eg creative) and extend the tourist season. • Energy: national opportunities will largely drive any opportunities arising from Dungeness. The idea of a Geological Disposal Facility is no longer of interest, given the new Council Administration, but there may be opportunities around new small nuclear reactors or even nuclear fusion. • Construction, given house building and Otterpool. • Transport and logistics: there are opportunities for growth here, given the presence, for example, of Alcaline²¹ at Lympe Industrial Park. There are also proposals for a logistics and facilities for lorries at Cheriton Park. <p>Romney Marsh will have investment in a new industrial estate to create grow-on space for existing businesses and there will also be some new business space for light industrial uses at the Mountfield Road Employment Hub.</p> <p>Folkestone town centre is expected to have a growth in shared workspace at new co-working spaces. The town is being promoted as a 'new live-work destination', responding to the potential of people relocating from cities. This appears to be getting some traction.</p>
Community	<p>The District has an ageing population, which could further drive demand for social care. There is also a move to attract in more young people (eg Otterpool), which would increase demand for childcare. There has also been a discussion about EKC Group getting involved in primary education.</p>
Skills Priorities	<p>Curriculum priorities would include:</p> <ul style="list-style-type: none"> • Construction • Care

²⁰ <https://folkestone-hythe.gov.uk/planning/planning-policy/local-map/examination-news-and-updates>

²¹ <https://www.alcaline.uk.com/>

	<ul style="list-style-type: none"> • Logistics (potentially) • Creative / digital / media (often non-place based jobs and so relevant to plans for Folkestone town centre) • Retraining of people who need to career change because of the pandemic (adults). The main opportunities locally would be Tech and the Creative sector. 50+ a particular concern. • Enterprise and adaptability: the College should be thinking about how it will respond to changing lifestyles and work patterns in the future. In particular, people will have many jobs / careers or have different work happening at the same time, which raises a need for generic as well as specific skills.
Other	The College needs to consider its Ashford and Folkestone operations together and make sure they are complementary and coordinated. They have competed in the past, and this has not been very helpful.

Stakeholder	Swale Borough Council
State of Play	<p>A number of key local policies have been adjusted since the 'Rainbow Coalition' Council was elected in May 2019. The previous an Economic Development Strategy focused on attracting inward investment and organic growth, building on local strengths in industrial sectors like warehousing and manufacturing, and some emphasis on the visitor economy. The new administration adopted an Economic Improvement Plan²² in early 2020 which has much more of a focus on visitor economy, micro-businesses, 'indigenous' growth based on existing businesses and the skills that residents have, and creative industries. This has more of an aspirational focus in the sense that it reflects a desire to grow the creative industries, rather than building upon established strengths. It seems likely that the Borough will continue to be strong in industrial sectors too. The visitor economy is of a reasonable size, but perhaps somewhat dispersed and not well organised, so a priority in coming years may be to present the sector in a better light and demonstrate its value to the local economy, as well as seeking to grow it.</p> <p>The new, emerging Local Plan²³ is going through the consultation process. There may be less emphasis on creating large parcels of employment land than in previous iterations and there is also a shift in housing policy which places more emphasis on Faversham and Swale East in terms of residential numbers. This includes the Duchy of Cornwall's proposals for 3,500 new homes at Faversham, of which the new administration is very supportive. The approach taken will be like that for Poundbury²⁴ in the South West, which places a high degree of emphasis on sustainability and traditional craft skills, with small businesses well integrated into the residential aspect. At Poundbury the Duchy started working with small businesses and local colleges on skills like stonemasonry.</p> <p>The other significant residential development is the largest strategic housing development at NW Sittingbourne, which involves 1,400 homes, a new secondary school and new primary school.</p>
Economy	<p>Despite uncertainties created by Covid and Brexit, there are a number of strong and growing sectors:</p> <ul style="list-style-type: none"> • Logistics: distribution is expanding, with a particular emphasis on 'the last mile' operations – smaller 'sheds' (c50,000 sq ft, goods in, goods out), not 'mega sheds' any more. The Port of Sheerness is expected to remain a major economic driver on the Island in activities like distribution and port activities. • Visitor economy and hospitality: likely to grow and including town centre recoveries post-Covid. • Manufacturing remains very significant in the Borough. One company has identified potential for 'onshoring' of manufacturing from mainland Europe. • Horticulture: one of the main growth areas for Swale, especially soft fruits and top fruits. There's an explosion at viticulture (grape growing more than wine making), with Chapeldown, for example, having bought up large swathes of land in the Borough. Brexit is likely to create labour shortages or a need to adopt technology to reduce labour demand. • Food production is also significant, with a lot of vertical integration, including national brands like Cook Kitchen (high quality frozen foods) and Shepherd Neame, but also a proliferation of small, on-farm food manufacturing producers. These can draw a lot on craft-focused catering skills (as opposed to more industrial production processes), which could be very relevant to EKC Group's hospitality and catering specialisms. <p>Overall, food as a theme – growing and production - is now a major part of the economy in Swale.</p>

²² <https://services.swale.gov.uk/assets/Consultations/Economic-Development-Plan/Swale-Economic-Improvement-Plan.pdf>

²³ <https://swale.gov.uk/planning-and-regeneration/local-plans/local-plan-review/local-plan-review>

²⁴ <https://poundbury.co.uk/>

	<p>An emerging change is that people's working patterns are evolving and how this can increase the potential for more entrepreneurial activity locally. This might be driven, post-Covid, in part by redundancies, but also by a growing desire to commute less and be more locally based. The Council is expecting a growing number of enquiries from a wide range of people looking at start up and needing business support just to get started. This will be in a range of sectors.</p>
Community	<p>There is anticipated population growth, driven by housing, currently focused on Sittingbourne and Sheppey and later more towards Faversham. The age profile of the Borough is unlikely to change.</p> <p>There is a significant challenge around young people aged 18-24-year-olds and access to employment. It will be interesting to see what the impact of Covid is in future on the current Years 11-13.</p> <p>As regards deprivation, the Island has widespread challenges. There are also very challenged parts of Sittingbourne and Faversham. The Faversham case is often overlooked. In these two towns deprivation mainly affects quite self-contained communities. Certain communities rely heavily on certain companies. North Sittingbourne is traditionally associated with the paper mill and the manufacturing companies in the Kemsley Fields area. In Faversham, the North Preston Estate is heavily dependent for employment on the Gist M&S regional distribution centre. The resilience of these communities is wrapped up with these key employers, and transferable skills like English, Maths, digital skills are likely to be of value.</p> <p>There is a worsening shortage of secondary provision in Sittingbourne: by 2024 Sittingbourne will be 6 forms of entry short of secondary school places. This growth in demand for Sittingbourne school places is primarily being driven by large numbers (1,000+) of children coming from the Isle of Sheppey every day because of issues at the Oasis Academy. The new school at NW Sittingbourne appears to be the only solution to the crisis, and this would only be available and open from 2024 at the earliest. So, at the moment, there is a short-term shortage of secondary school places. There have been discussions with EKC Group about how they might be able to help.</p> <p>Consideration was given a few years ago to a new FE centre in Sittingbourne run by EKC Group and MidKent College, supported by Swale BC, but wasn't considered viable in terms of low volumes and revenue funding and FE overall was quite unstable at the time (Hadlow Group, Ashford, etc). Now there is growing interest in the new school planned for Sittingbourne having a much stronger vocational thread. The school might, for example, just be years 7-11 (no sixth) with an overtly vocational offer, even if this is located in the centre of Sittingbourne</p>
Skills Priorities	<p>The local authority is primarily looking for more access to <i>skills</i>, rather than education for local people – more access to FE for young people and adults. The main priorities are:</p> <ul style="list-style-type: none"> • Retail, hospitality, visitor economy: a need to be able to respond to changing market conditions and adopt digital technologies. These companies may be less adaptive than other sector like logistics, which have developed new capabilities quite quickly. There may be an especially traditional mindset in Sheerness and Sittingbourne, while Faversham traders have perhaps been more open to experimenting with new, experience-based activities or being open digital opportunities. • Construction (including the Duchy of Cornwall's project). • Food – growing and processing / manufacturing, linked to catering skills and emerging specialisms like viticulture. • Logistics • Manufacturing

	<ul style="list-style-type: none"> • IT and digital skills for adults. • More vocational opportunities for young people (because school doesn't work for many young people, especially on the Island). More and better FE generally is what is needed for these people, and more of a physical presence would help this. • Entrepreneurship and business management <p>In respect of the final priority above, there are signs that many local people, who are self-employed or sole traders (including hair and beauty, creative industries, etc) lack the most basic skills to run their own small business at a very practical level (even the basics such as insurance, cash flow, etc). This could be a gap in local provision more generally or could be added on to mainstream programmes. The Council could potentially support this through its business support activities.</p>
Other	<p>The Council really values how EKC Group has turned around Sheppey College and changed perceptions. If there was a move to expand Sheppey College, the Council would be very supportive, and there could well be learner demand for it, especially if there were extra funding for adult re-training and for 16-18. The Council would have faith in EKC group to do this well.</p>

Stakeholder	Thanet District Council
State of Play	<p>The Thanet Local Plan²⁵ has been adopted, but is being reviewed during 2021, because of issues relating to the Manston and some housing sites. The airport element is what might change most.</p> <p>The Economic Growth Strategy²⁶ (2016) is still a key document. It was due to be reviewed in 2020, but the review was put on hold. There will be a new Strategy but the timing of this has not yet been decided. Education is certain to be a priority, as it is now.</p> <p>There is no ED Team at TDC, just one part-time Director and their small tourism team focused on destination development, town centre management and the Ramsgate Heritage Action Zone. The key current local regeneration initiatives are:</p> <ul style="list-style-type: none"> • High Street Fund bid in Ramsgate • Hight Street Heritage Action Zone in Ramsgate • Margate Town Deal bid <p>Tourism assets are also being reviewed to assess how bets use can be made of them.</p>
Economy	<p>The main sector priorities are:</p> <ul style="list-style-type: none"> • Visitor economy: key to Thanet, accounting for about 90% of the workforce. 2020 turned out to be a successful year for the industry once travel restrictions were lifted. 2021 will be similar and future years look promising too, especially if there is a growth in 'staycations'. The visitor economy also encompasses the wider 'experience economy' of more local residents making the most of what Margate has to offer. What is distinctive about Thanet in this respect is the importance of independents. There are many high-end boutique hotels, for example, with another coming too soon. Being less reliant on brands in town centres in food and beverage will benefit Thanet – more fleet of foot and lower overheads, probably quite resilient and able to grow. • Creative industries: There is also growth in this sector, albeit with some fragilities. • Green energy has been identified as an opportunity area. • Manufacturing: there is some of this in the District, but companies are mainly small businesses with little succession planning and little churn to free up opportunities for younger people. • Enterprise: Thanet has tended to have high levels of business start-up (but also business deaths) and there is quite an entrepreneurial spirit, as well as costs like space being a lot lower, making it easier to take risks. <p>More people are also moving to the area – especially Margate. This has increased with the pandemic, given the lifestyle and work opportunities the area has to offer.</p>
Community	<p>There are high levels of deprivation across all the indicators. This The Town Deal Investment Plan work looked at social challenges the town faces and probably also contributes to depressed wage levels. d there was also stakeholder engagement work to build a range of perspectives and their priorities on the issues the town faces. Many of these will apply across the District. Opportunities for young people came up as a major priority. This includes job opportunities that young people can realistically access.</p> <p>The population is changing quite quickly. There are, for example many people moving in with higher level skills, potentially raising the risk of a disconnect with the existing community.</p>

²⁵ <https://www.thanet.gov.uk/info-pages/local-plan-updates/>

²⁶ <https://www.thanet.gov.uk/wp-content/uploads/2018/08/FINAL-Thanet-Economic-Growth-Strategy-060117.pdf>

	<p>There are also large numbers of looked after children and placement of people in the area (those with special needs, for example). A multi-agency task force has been set up to address some of these issues.</p>
Skills Priorities	<p>The main skills priorities are:</p> <ul style="list-style-type: none"> • Creative industries (Margate is getting kudos, and this can be built upon). The sector is very broad in Thanet. The Thames production Corridor also highlights some of the many local strengths and growth. It tends to involve very small businesses. • Visitor / experience economy, making more of these specialists in this area, engaging with the many local interesting businesses • Green technologies, building on the specialist centre at Broadstairs. • Re-training and getting people back into education, especially for more challenging groups • Enterprise and entrepreneurship: helping people to gain the skills to set up and run businesses. There aren't many large employers, so you need more of this. • Customer-related skills, which are relevant to visitor / experience economy and creative sector, for example. <p>Developments are anticipated at the Port of Ramsgate. The detail is not yet known, but this is something which the College could support.</p> <p>Manston raises opportunities, whether as an airport or something else. Economic activity is needed at the site, given the lack of employment land in the District, whether or not the airport plan proceeds.</p>
Other	<p>There has been a lot of change in recent years. Initiatives like the Yarrow Hotel were strongly welcomed and seem as a specific response to the needs of the visitor economy. Further work to respond to the needs of local businesses would be welcomed. There has been work with businesses in creative industries and tourism, for example, but not much has come of it. This may be an issue that affects education more widely.</p> <p>The Council is interested in exploring the construction skills needs of the historic environment and would welcome an opportunity to work with the College on this.</p> <p>There is a lot of engagement on the local Board, and this is a good way to test and develop new ideas. The growth from Thanet College to EKC Group may actually be counterproductive locally if it feeds a perception that there is less focus on the local area, even though the College is very active in the local community and tends to build on new projects once they are under way.</p>

Annex 2: KMEP Key Industry Sector v Sector Subject Area Matrix

SSA / Industry (SIC based)	Agriculture & horticulture	Energy, utilities & env technologies	Manufacturing	Development & Construction	Transport & Logistics	Visitor Economy	Digital Tech	Finance, Professional & Business Services	Cultural & Creative Industries	Health & Social Care	Life Sciences
1. Health, Public Services and Care											
2. Science and Mathematics											
3. Agriculture, Horticulture and Animal Care											
4. Engineering and Manufacturing Technologies											
5. Construction, Planning and the Built Environment											
6. Information and Communication Technology											
7. Retail and Commercial Enterprise											
8. Leisure, Travel and Tourism											
9. Arts, Media and Publishing											
10. History, Philosophy and Theology											
11. Social Sciences											
12. Languages, Literature and Culture											
13. Education and Training											
14. Preparation for Life and Work											
15. Business, Administration, Finance and Law											