

YEAR OF THE
Coast
2023

Communities on the edge

Assessing the need for Levelling Up in England's coastal authorities

January 2023

pragmatix
advisory



Communities on the edge

**A report for the Coastal Communities Alliance
and partners**

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Mark Pragnell





Coastal
Partners



Communities on the edge

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Disclaimer

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Please note numbers in tables may not sum due to rounding.

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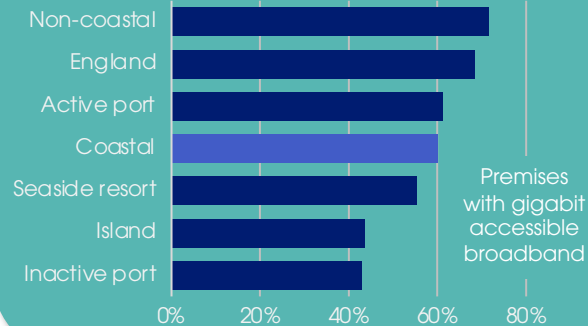
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Coastal challenges

Digital connectivity



Cost of living



13 per cent of homes in fuel poverty



Lower educational attainment and higher rates of school absence

Insufficient funding



Costs of delivering services is higher, higher demands and seasonal fluctuation

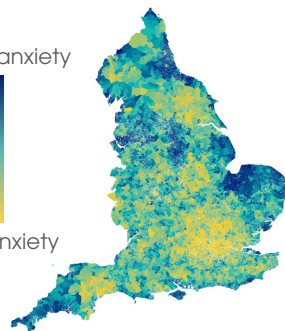
Lower rates of productivity



Poor mental health

Higher anxiety

Lower anxiety



Lower wages



Employees in bottom income decile are paid £830 less a year on the coast

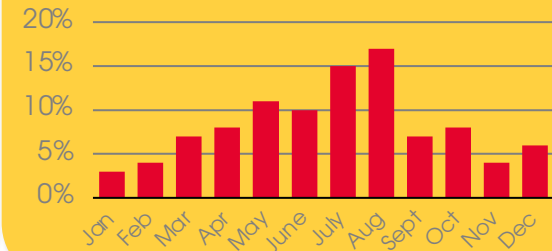
Coastal opportunities

Ports supporting future investment and skills



Every one port job supports six more

Extending the visitor season



Energy generation



Coastal generates double the amount of renewable energy than non-coastal

Hybrid working



Attracting more people to live on coast

Expansion of EV charging network



Staycations



Six million more visits a year if one in ten overseas holidays became staycations

Carbon capture



Saltmarshes remove 81,000 tonnes of carbon dioxide equivalent a year

Green jobs



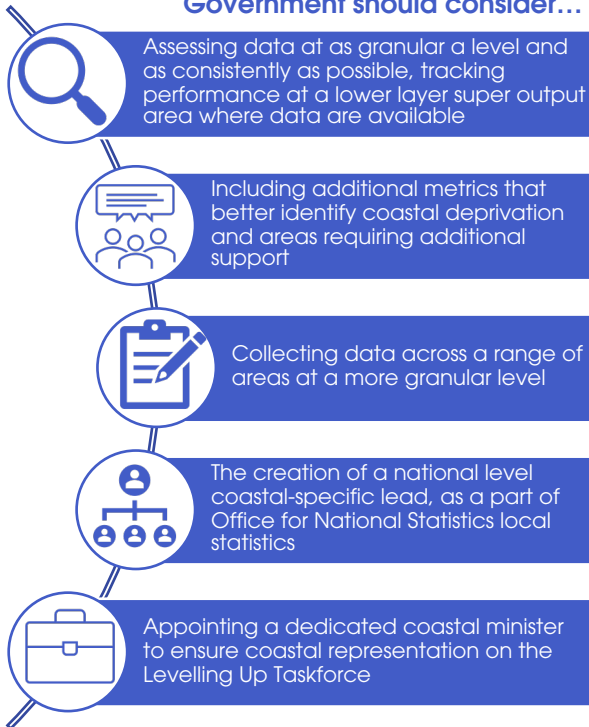
1.2m low carbon jobs by 2050 offers potential for new local employment

Executive summary

Pragmatix Advisory has been commissioned by Coastal Communities Alliance, Coastal Partners, Coastal Partnerships Network, East Riding of Yorkshire Council, Essex County Council, Greater Lincolnshire LEP, LGA Coastal SIG, Lincolnshire County Council, National Coastal Tourism Academy, North East Lincolnshire Council, South Tyneside Council and Torbay Council to research and report on the scale of the coastal Levelling Up challenge, and the opportunities for growth in coastal communities.

Opportunity to strengthen Levelling Up framework

Government should consider...



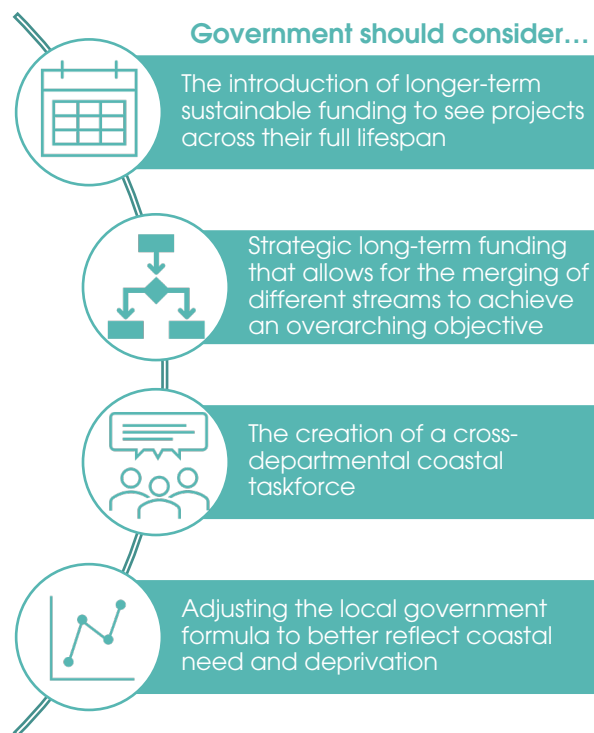
Levelling Up has the potential to improve outcomes for residents and businesses in coastal communities, and with modifications to the existing framework, their contribution to the United Kingdom economy could be even greater.

Not all coastal areas are the same and the challenges they face are varied, but analysis of government's chosen metrics shows the need for Levelling Up in England's coastal communities. Household income is almost £3,000 lower than in non-coastal areas, while nearly one in five coastal jobs are below the living wage – a greater proportion than England over all. Productivity is lower, health outcomes are poorer, and digital and physical connectivity are lagging behind the rest of the country. All of these factors stifle growth and limit the potential of coastal communities.

While not every metric can be considered for Levelling Up, there are important factors missing from the framework, including those which would help measure the impact of the cost of living crisis. These struggles are exacerbated on the coast, as many living on the periphery may not have access to cheaper mains gas and instead rely on electricity or oil to heat their homes. This, along with other hidden costs like the need to own a car where public transport is unavailable, or having to travel further to access a supermarket, mean cost of living pressures will be more acutely felt. This also applies to business viability, with higher cost bases on the coast affecting wage levels and squeezing already tight margins.

The Levelling Up White Paper identifies the need for a long-term evidence-based programme to track the contributing factors driving transformation and growth across the United Kingdom. Its aims would be strengthened by the inclusion of the additional metrics outlined in this report, as well as consistency across the evidence with data being collected and analysed at local authority district level where possible.

Long-term funding plan will enable growth



Many of the challenges facing coastal communities have developed over years, if not decades, and addressing these issues requires longer-term funding strategies.

One of the key challenges identified during our research was the short-term nature of many funding streams. Those which require money to be spent within one to three years, or which require set outcomes within a similar time frame, reduce the scope of projects in which local authorities and their partners can invest.

Further issues can arise when applications for funding are adjusted to match the criteria of the fund, rather than the fund meeting the existing need, while the requirement for match funding can be a barrier for disadvantaged areas in which private investment is not readily available.

Allowing for the development of a longer-term, strategic plan to join up funding streams towards an overarching aim, or permitting authorities to spend the funding in a way which they believe would benefit their communities, would be more conducive to Levelling Up coastal areas.

But if coastal communities are to fully unlock their potential, the changes to funding will need to go beyond the Levelling Up Fund. One way to achieve this could be to adjust the local government funding formula to better reflect need, deprivation and higher costs, providing councils with some of the additional funds required to help tackle local challenges.

With support, coastal can contribute even more

Key areas of growth include...



The green economy

Investing more in physical, human and natural capital along England's coast will support communities in making the most of current and future opportunities for growth. In turn, they will contribute even more to the United Kingdom economy.

Green energy will continue to be a key area of growth for coastal communities, with renewable energy on the rise in part because of the need to reduce reliance on external sources for oil and gas. For the first time ever in the United Kingdom renewable energy generation outstripped fossil fuels in 2020, with coastal communities generating more renewable energy than the national average. Reducing the need for oil and will both help meet net zero targets, and hopefully lessen the volatility of energy bills for businesses and households.



Marine environment & infrastructure

Marine development and infrastructure are pivotal to coastal communities, and ports remain a key job provider. Official forecasts expect port freight tonnage to increase by nearly 40 per cent over the next two decades, while the creation of new Freeports will create much needed jobs in some of the most disadvantaged areas of the country. Coastal communities have been facing a decline in the fishing fleet for a number of decades, but changing preferences and a smaller fleet offers the opportunity for the fishing industry to develop a more sustainable, higher value offer for consumers. Holistic use of marine resources, including Marine Protected Areas, provides the opportunity to support coastal communities and develop resilient ecosystems.



Careers & education

The rise of hybrid working presents an opportunity for coastal communities to draw in skilled, higher paid workers. Similarly, covid provided an insight into new ways of education delivery, with a mix of at home and online learning offering the chance to gain qualifications without the need to relocate. The improvement of digital access and higher/ further education outreach programmes benefit both young people and those looking to reskill in coastal areas, with further support coming in the form of fit-for-purpose transport to learning and skills hubs. While not the principal solution to the coastal transport deficit, promotion of schemes like Active Travel England, which provide funding for Bikeability training for school children, can help nurture career and education growth.



The visitor economy

Tourists have been drawn to the coast for centuries, and the visitor economy remains vital. Developing the coast depends on the sustainability of tourism year round, and collaboration between businesses, destination management organisations and local authorities will be the key to help join up the offer and ensure that coastal sites and products are attractive to visitors. Extending the season would mean more year-round jobs, growing wages and the creation of long-term careers, making the industry more attractive to young people.

To support the green economy in coastal communities, we recommend that government consider...

- Providing additional funding and support for the installation of more public electric vehicle charging points
- Developing a compensation route for residents whose homes are at risk due to England's changing coastline, and promoting support packages where demolition of property is needed
- Reviewing the contents of the historic coastal landfills and look to move the high priority landfills further inland before their contents can affect the surrounding water quality
- Providing support to help restore England's degraded coastal and inshore marine habitats, such as saltmarshes with the aim to mitigate carbon emissions
- Reviewing the messaging behind the green transition to encourage more people to switch to eco-friendly lifestyle habits where possible.

To support careers and education in coastal communities, we recommend that government consider...


- Providing teacher retention data at a local authority level, rather than as a time series
- Supporting the development of packages that incentivise teachers to stay in schools with lower attainment levels on the coast
- Increasing funding for infrastructure connections and alternative transport schemes to reduce the rate of persistently absent students in coastal schools
- Developing a plan to address the coastal housing crisis to help enable young workers to stay in the local community
- Focussing on improving digital connectivity in coastal areas to ease businesses digital operations and the uptake of working from home.
- Incorporating green/blue skills into the curriculum at secondary school level to increase ocean literacy through career pathway creation.

To support marine environment and infrastructure in coastal communities, we recommend that government consider...

- Funding more strategic research and development projects
- Improving the marine data and evidence available
- Encouraging the pairing of wind farms with carbon capture technologies to reduce the impacts of climate change and promote collaboration across coastal communities
- Facilitating the co-location of offshore wind farms with marine protected areas and restoration of coastal and inshore marine habitats
- Supporting the introduction of contacts between ports and educational establishments to better develop local understanding of the range of jobs available in the port sector
- Supporting fisheries focus on sustainable fishing practices and products
- Helping balance conflicts between fisheries and renewable energy producers and farm land used for landing cables.

To support the visitor economy in coastal communities, we recommend that government consider...

- Providing additional assistance for Destination Management Organisations and businesses to develop products and experiences to suit the changing consumer needs and extend the seasonality
- Further promoting the England Coast Path National Trail
- Advertising the coastal offer to draw in more international visitors
- Drawing attention to campaigns for beach and water safety such as RNLI's Respect the Water and Float to Live
- Supporting the initiation of business mentorships for small coastal enterprises to share best practice and help with the digital transition
- Improving seasonal worker visa regimes for temporary hospitality workers
- Further researching the impacts of poor water quality and coastal and marine environments on the visitor economy and the potential boost from restoring habitats and protected areas.

An aerial photograph of a river flowing through a rocky landscape. The water is a deep, dark blue-green color. Several kayakers are visible on the river, scattered across the lower half of the frame. The right side of the image shows a steep, rocky bank covered in patches of green moss and lichen. The overall scene is rugged and natural.

Part 1: The Levelling Up agenda

Levelling up is a priority for government

The United Kingdom government has set out twelve quantifiable Levelling Up missions in the United Kingdom to be met by 2030.

The Department for Levelling Up, Housing and Communities has identified a suite of metrics to support the monitoring and evaluation of progress against the twelve missions and the four high-level objectives of the Levelling Up programme. These metrics aim to help address a number of measurement challenges.

Headline metrics are the principal tool for describing the specific disparities that missions are aiming to address and for monitoring developments against the missions. Supporting metrics capture information relevant to, but broader than, the specific mission.

A combination of the headline and supporting metrics will provide information on the evolution of spatial disparities in a broader Levelling Up context. It is envisaged that this information forms a crucial input to any evaluation of progress towards the missions.

Boosting productivity, pay, jobs and living standards by growing the private sector

1. Pay, employment productivity and global competitiveness will have increased across the UK, and gap from worst to best performing to narrow.
2. Public investment in R&D outside the Greater South East will have increased by 33-40 per cent.
3. Local public transport connectivity across the country will be significantly closer to the standards of London, with improved services, simpler fares and integrated ticketing.
4. The UK will have nationwide gigabit-capable broadband and 4G coverage, with 5G coverage for the majority of the population.

Spreading opportunity and improving public services

5. The number of primary school children achieving the expected standard in reading, writing and maths will have significantly increased.
6. The number of people successfully completing high-quality skills training will have significantly increased in every area of the UK.
7. The gap in Healthy Life Expectancy (HLE) between local areas where it is highest and lowest will have narrowed, and by 2035 HLE will rise by 5 years.
8. Well-being will have improved in every area of the UK, with the gap between top performing and other areas closing.

Restoring a sense of community, local pride and belonging

9. Pride in place, such as people's satisfaction with their town centre and engagement in local culture and community, will have risen in every area of the UK, with gap to top performing closing.
10. Renters will have a secure path to ownership with the number of first-time buyers increasing in all areas; and number of non-decent rented homes to have fallen by 50%.
11. Homicide, serious violence, and neighbourhood crime will have fallen, focused on the worst-affected areas

Empowering local leaders and communities

12. Every part of England that wants one will have a devolution deal with powers at or approaching the highest level of devolution and a simplified, long-term funding settlement.

Objectives and missions set out in the Levelling Up White Paper

Coastal performance on the Levelling Up metrics

In this section, we evaluate the performance of coastal communities on the Levelling Up metrics for which data are being assessed at a regional level, and the risks of only considering need at a such a high geographical level. In addition, we have created an indicative scoring for the available headline metrics to rate the performance of coastal in comparison to the nine English regions.

Coastal challenges overlooked in White Paper

In early 2022, the United Kingdom government published its long-awaited Levelling Up White Paper.

The paper articulated four high-level objectives and twelve missions to level up communities by 2030. It identified a suite of metrics to evaluate need and monitor progress against the missions. The 'headline metrics' are the principal tools for describing the specific disparities that missions are aiming to address and for tracking developments; 'supporting metrics' capture broader related information.

The list is preliminary, with the government consulting on additional metrics that might improve measurement or outcomes. The White Paper focuses almost entirely on metrics and measures that illustrate the need for Levelling Up regions or city-regions. There's limited reference to or analysis of coastal communities – or many other sub-regional geographies.

As an example of how the decline in one type of capital can lead to a self-perpetuating loop of decline in other capitals

"Figure 1 outlines some of these mutually-reinforcing cycles among the capitals. **For example, economic decline in the former industrial heartlands and coastal towns exacerbated poor health outcomes**, which in turn led to lower levels of human capital. The lower levels of human capital then reduced the incentives for business to invest in the region and skilled workers left to seek employment elsewhere, further reducing the incentives to invest. The result was a self-perpetuating loop in which lower human capital fed into lower levels of investment, thereby reducing productivity and earnings growth, depleting social capital and pride in place, and further exacerbating the migration of skilled workers and capital out of the region."

Recognising potential for improved living standards in coastal areas, amongst others

"As chapter 1 sets out, **there is potential to improve living standards in all areas of the UK, in cities, towns, rural and coastal areas**. Currently, coastal communities previously associated with tourism, parts of the North and Midlands where previously there were concentrations of manufacturing industry, and parts of Scotland, Wales and Northern Ireland underperform across key living standards metrics. As Chapter 1 sets out, there is considerable potential in these areas too, and policy interventions should seek to unlock it."

As an example of smaller areas with high crime rates

"The majority of crimes are committed in large metropolitan areas, reflecting both large residential populations and high levels of footfall. However, there are also **smaller areas with high crime rates, although these are less significant in terms of volume, such as deprived coastal areas**. This clustering of crime means that there are large spatial disparities in crime rates."

Coastal mentions in the Levelling Up White Paper and its technical annex

Focus on regions could miss areas in need

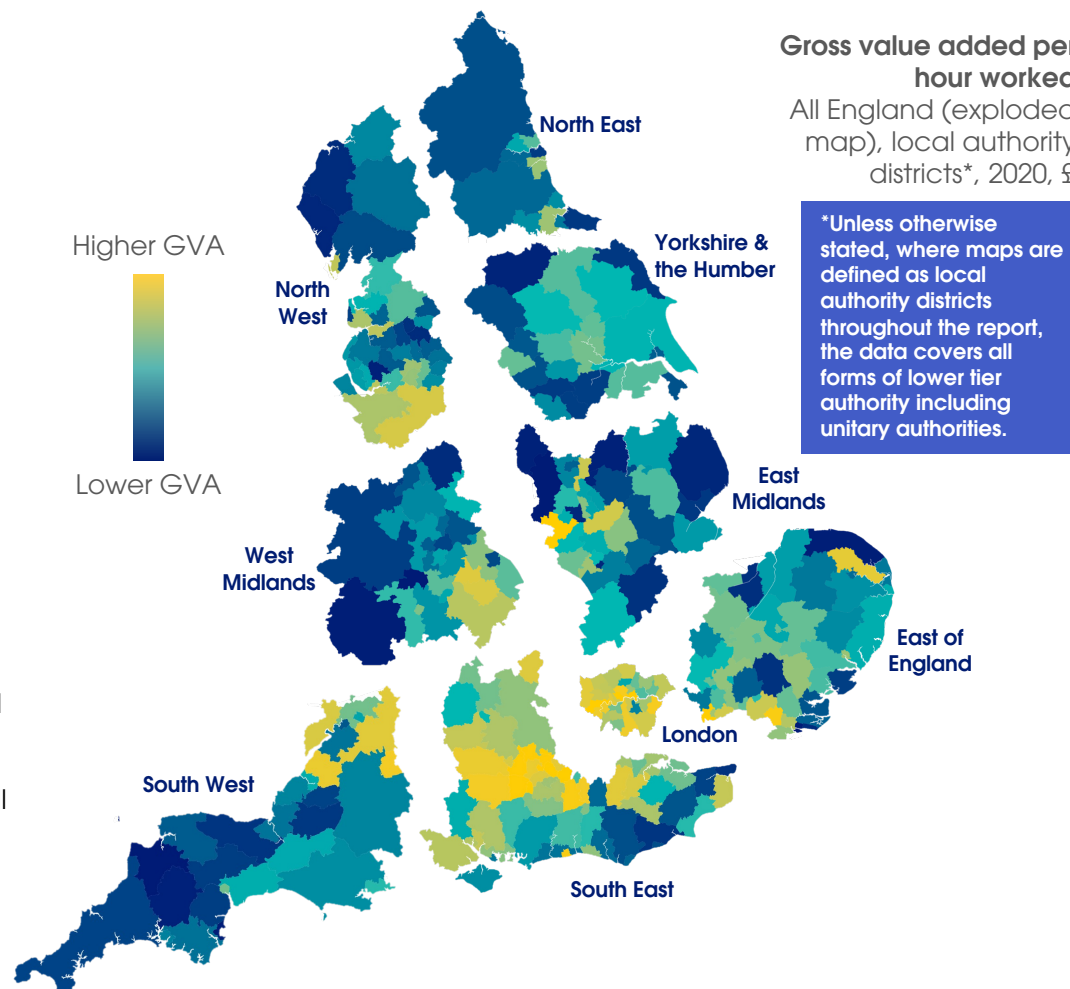
Focussing on targets at a regional level fails to address the inequalities within regions.

For the majority of its eleven Mission 1 metrics, the Department for Levelling Up, Housing and Communities is measuring Levelling Up need at a regional level. On nine of the metrics, data are available at local authority district level but are only assessed at this level for one. The other two metrics are available at ITL2 and ITL3 level, but again only regional performance is being considered.

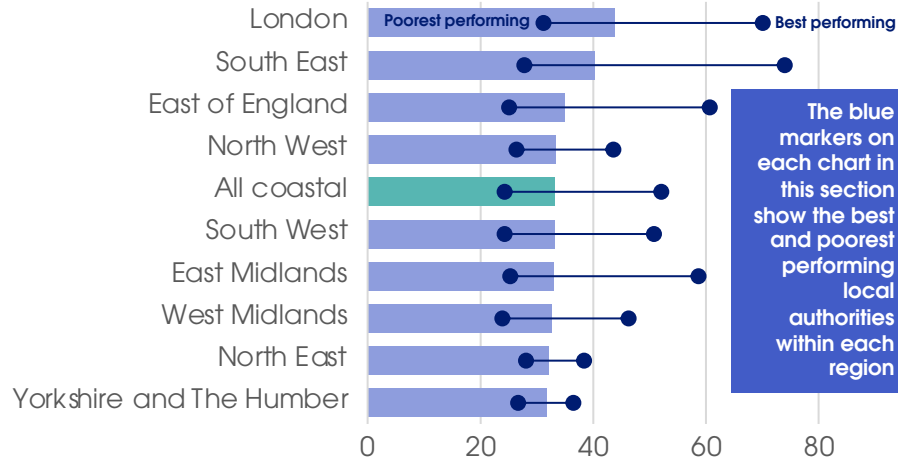
To better visualise how great the differences within the regions can be, we have mapped gross value added per hour worked for each local authority district in England. When the map is spilt by region, it shows the variation in performance of local authority areas. *Maps for other Levelling Up metrics are discussed in the following section.*

Consistent use of data at a more granular level would better identify the communities with the greatest need and target Levelling Up funds more appropriately. Reducing the gap between regions will not lead to true Levelling Up if it further increases the inequality within regions.

A full list of the Levelling Up metrics and the geography at which they will be measured can be found in the [appendix](#).



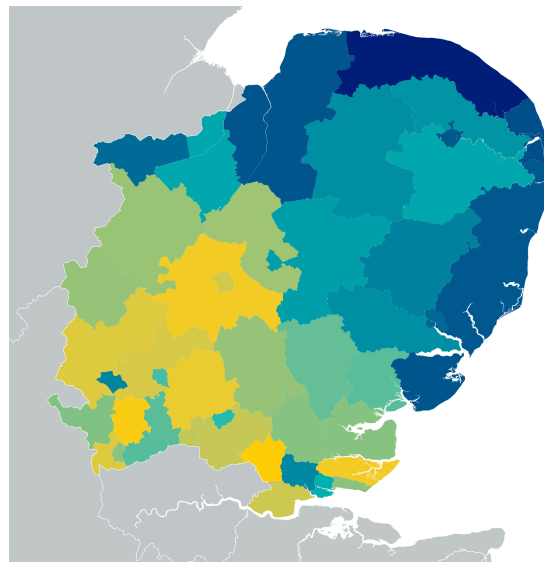
Gross value added per hour worked
England, local authority districts, 2020, £



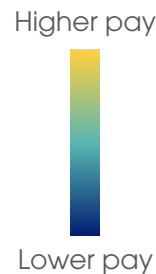
Poorly performing areas lost within regional averages

By plotting the best and worst performing local authorities, the disparity of performance within regions is more visible. On gross value added per hour worked, for example, we can see that the differences within the regions are much greater than the difference between the regions.

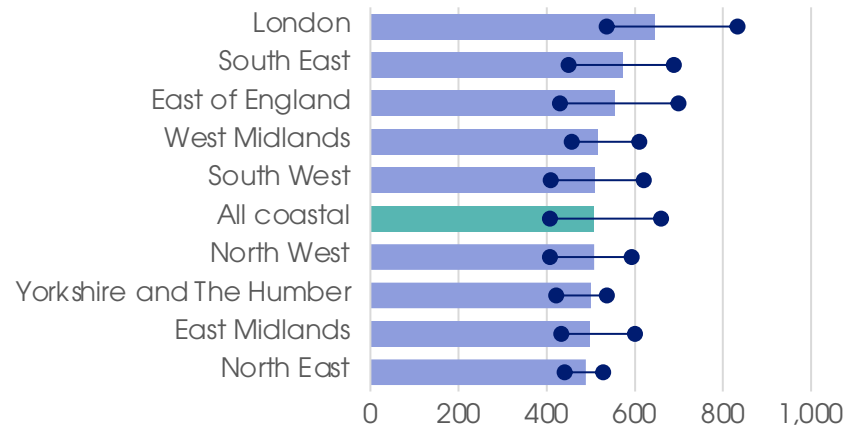
Mission 1 in the Levelling Up paper aims to close the pay gap between (predominantly) London and the South East and the rest of the country. On regional averages, the East of England has the third highest weekly pay and would appear not to be in need of as much Levelling Up. But when we map pay at lower-tier authority level, we can see that communities around the coast have some of the lowest levels of pay in the country. They risk missing out on additional support due to their higher earning neighbours if only average regional performance is considered.



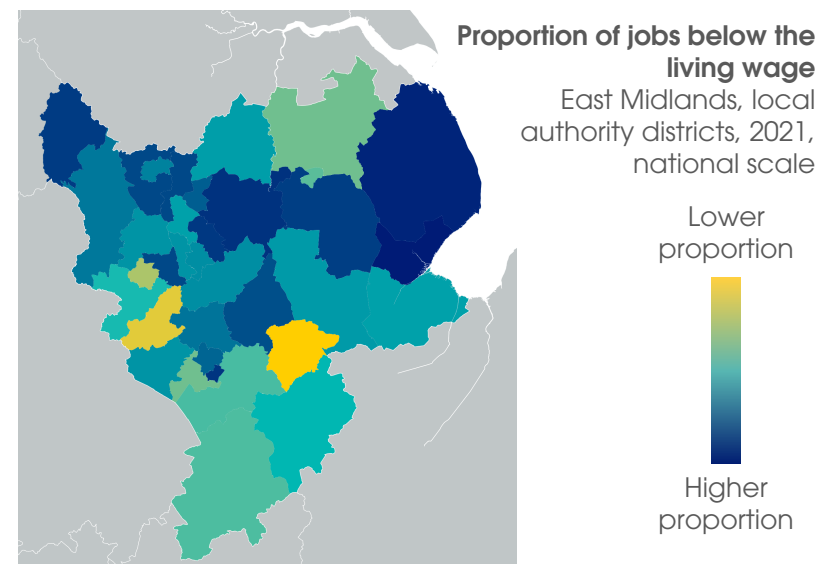
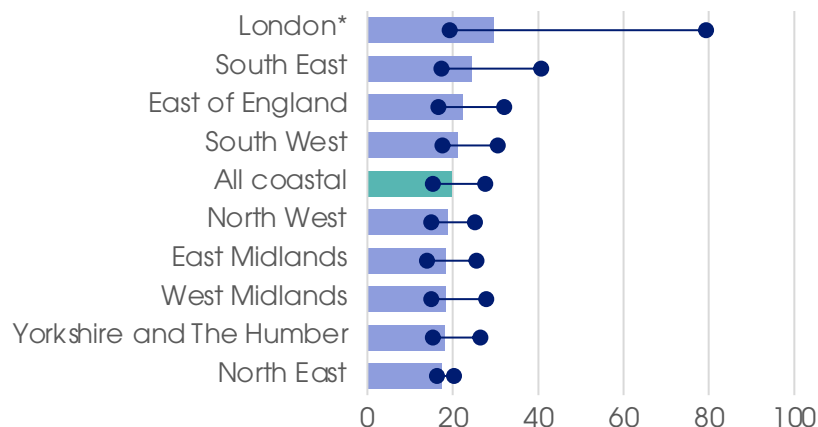
Gross median weekly pay
East of England, local authority districts, 2022, national scale



Gross median weekly pay
England, local authority districts, 2022, £



Gross Domestic Household Income per capita
England, local authority districts, 2020, £ thousands



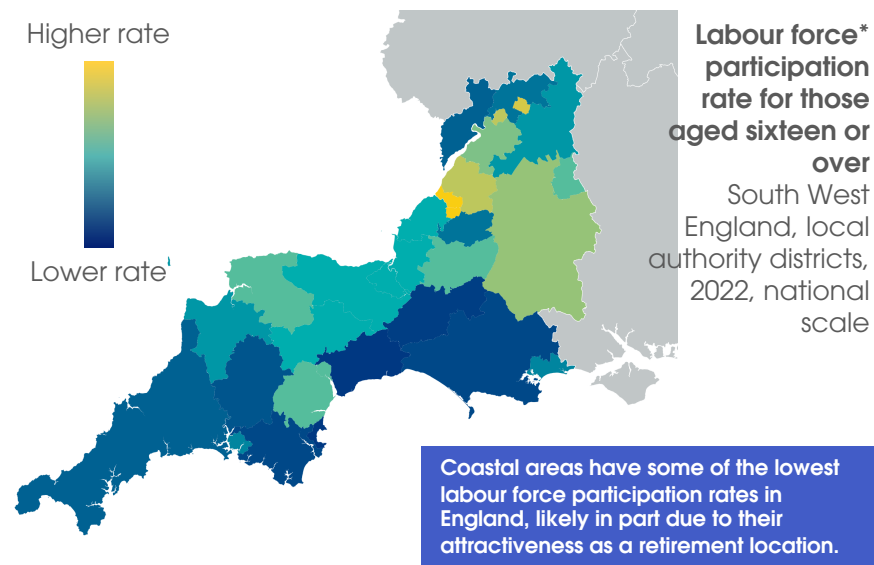
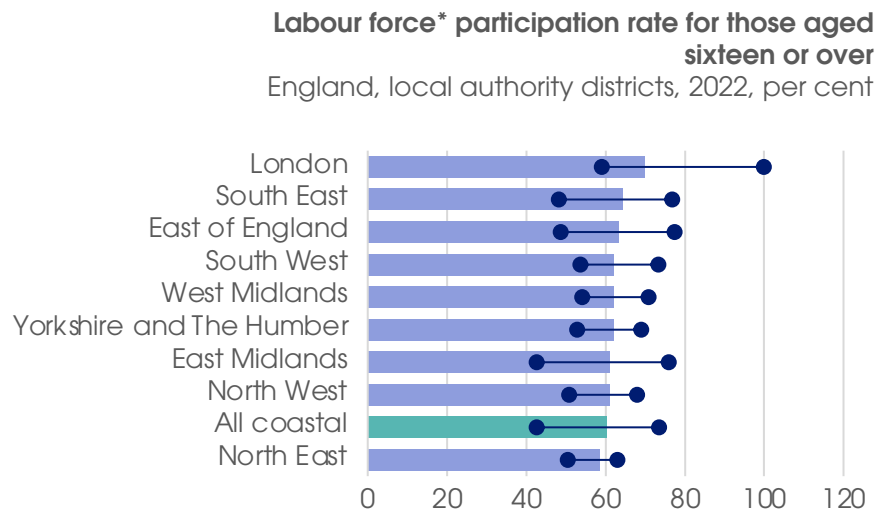
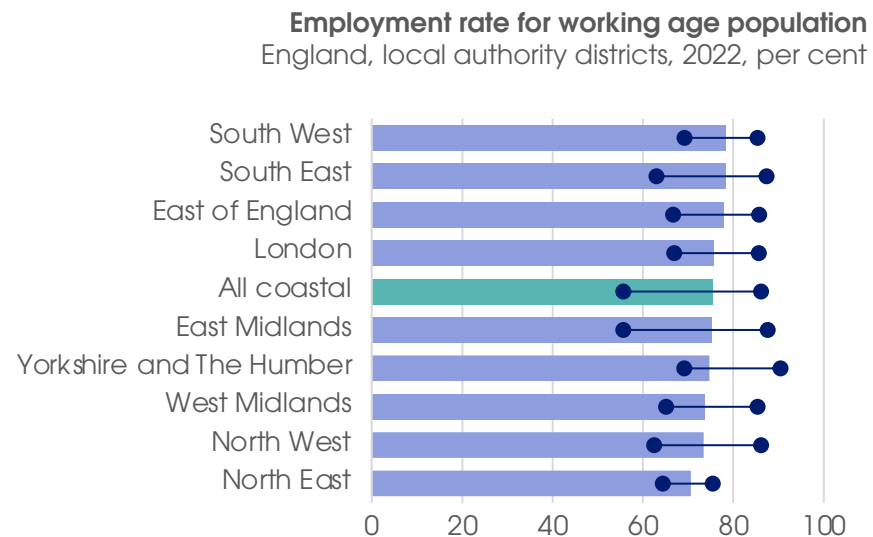
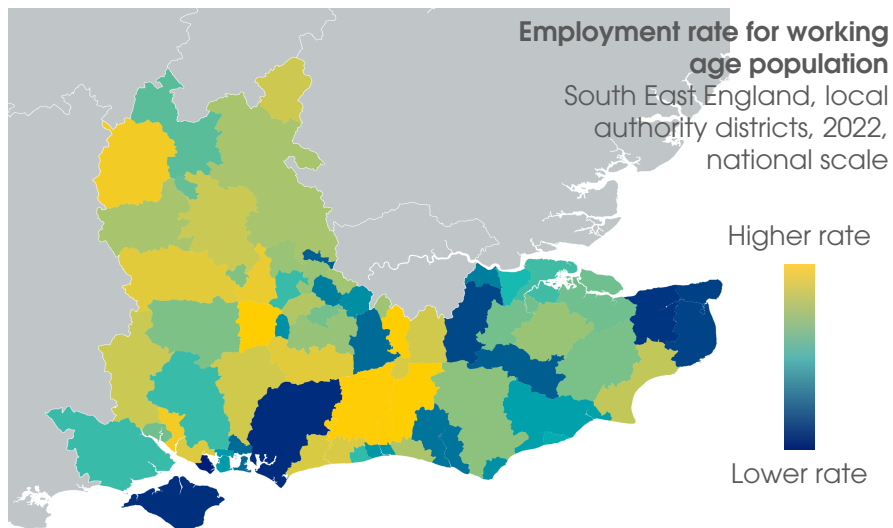
Large disparity when it comes to low paid jobs

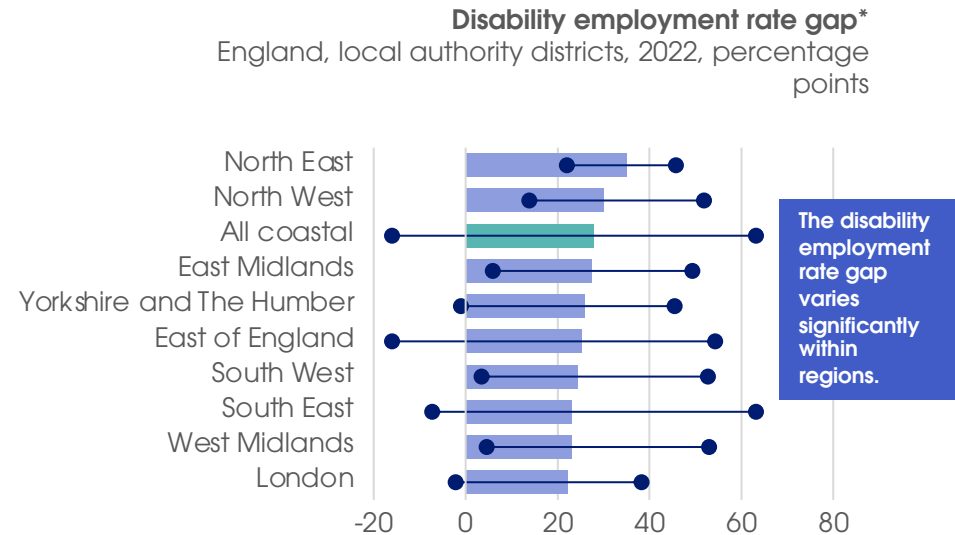
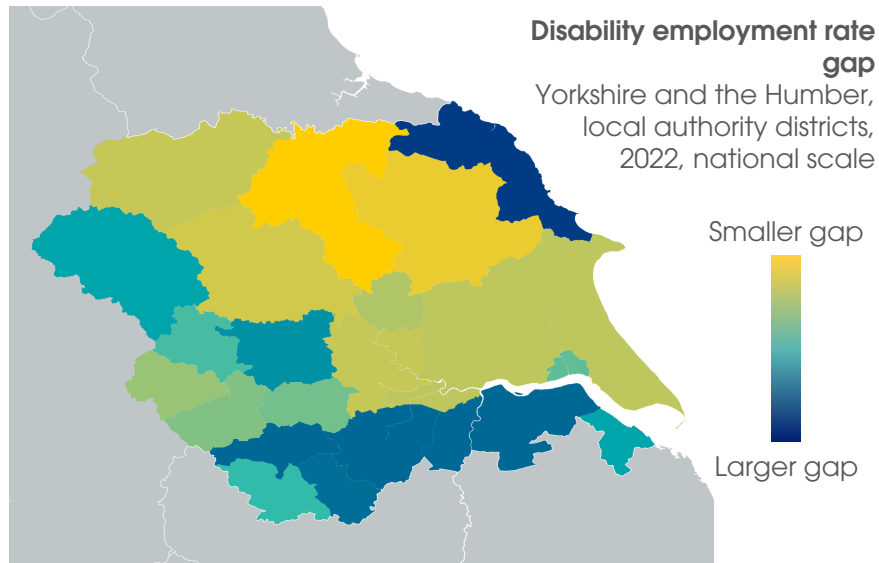
Due to the nature of work available on the coast, it is unsurprising coastal authorities have some of the highest proportion of jobs below the living wage. Seasonal and part-time employment in the tourism sector, along with a large share of small and micro businesses, often family owned or sole traders, mean wages tend to be lower. With many costs being higher at the coast, wage growth is more limited.

This is not the case in all areas – as shown in the data. But without considering the metric at a granular level, government's indicators for Levelling Up need will miss those who do require support.

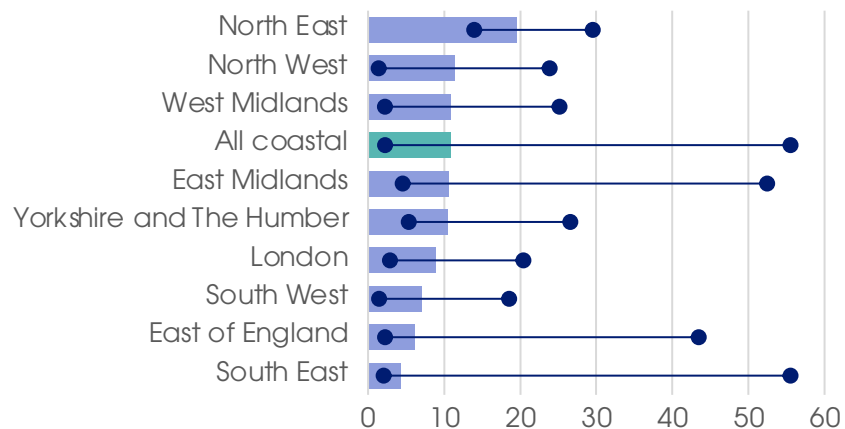
Proportion of jobs below the living wage
England, local authority districts, 2021, per cent







Proportion of children in workless households**
England, local authority districts, 2021, per cent



Lower-tier data shows extent to which regional averages hide local need

Despite being the best performing region on average, the South East of England is home to the local authority district with the highest share of children in workless households.

In coastal districts, the proportion of children living in workless household ranges from just two per cent in the best performing, to more than half in the poorest performing.

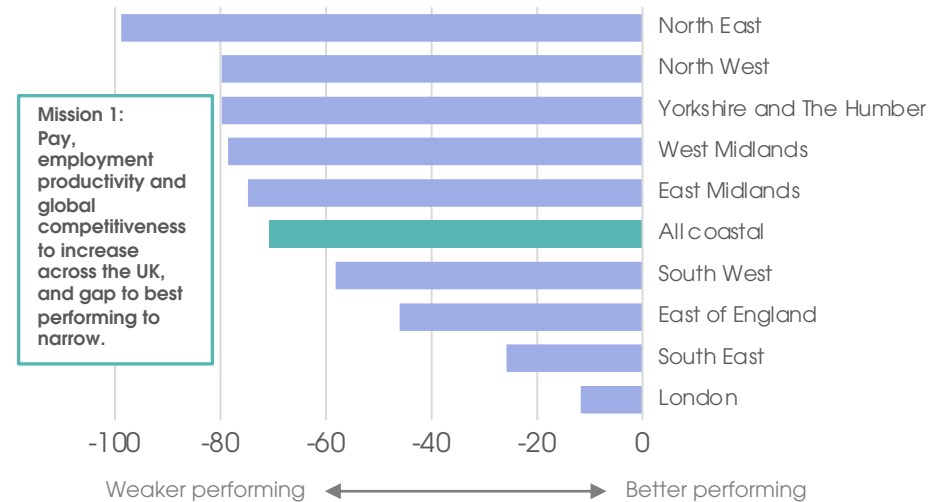
Indicative scoring shows where coastal ranks

We have systematically evaluated the performance of coastal communities on the framework set out in the Levelling Up White Paper. All nine English regions were given a score for each of the headline metrics. The best performing region scored 0 and the weakest -100, while the remaining regions were scaled proportionately between 0 and -100. The group of coastal authorities were assigned a score depending on their performance in comparison to the nine English regions.

Average scores were then combined for the headline metrics in each mission for which local authority district data were available, determining how far away from the target '0' baseline they were.

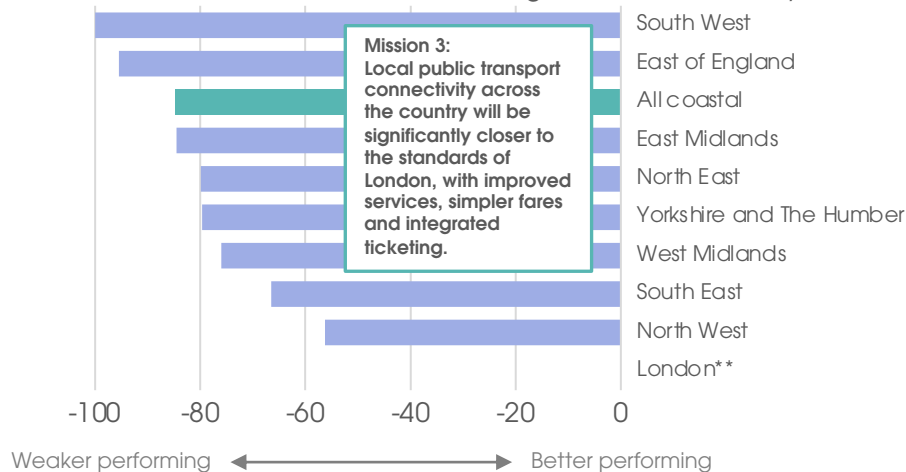
Average rating of Mission 1 headline metrics

England, local authority districts



Average rating of Mission 3 headline metrics for which local authority data is available*

England, local authority districts



Average rating of Mission 4 headline metrics

England, local authority districts



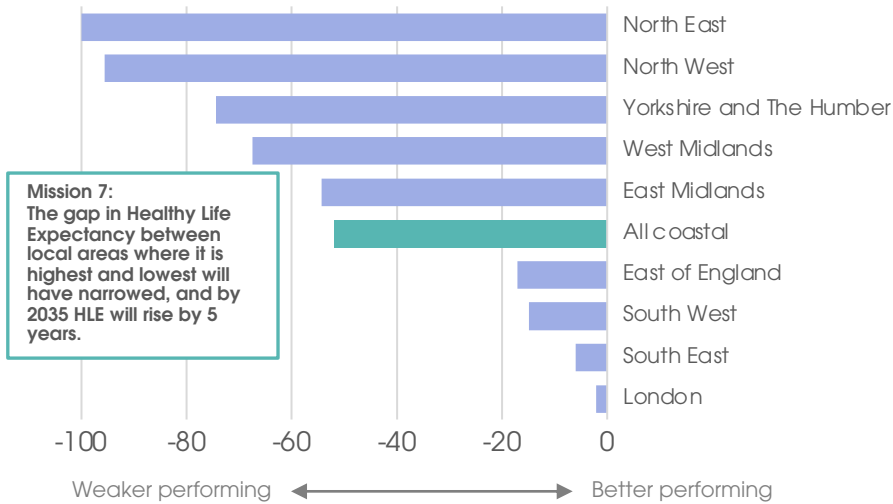
Not possible to analyse all metrics at district level

Average scores have been calculated for those missions for which data were available at local authority district level. Where the official statistics outlined by government are unavailable at a sufficiently granular level, we have been unable to produce a coastal score.

Some of the government's metrics are not collected at a lower level, and some data sets are yet to be compiled or confirmed. This includes the likes of Mission 10 metric on number of first-time buyers and the Mission 12 metric on devolution. For this reason, we have only been able to produce a headline metrics overall score for coastal on five of the Levelling Up missions. As identified by Professor Sir Chris Whitty's report, 'Health in Coastal Communities', capturing outcomes accurately is challenging when data are not available at a granular level, and performance can be averaged out with better performing inland towns.

Average rating of Mission 7 headline metrics

England, local authority districts



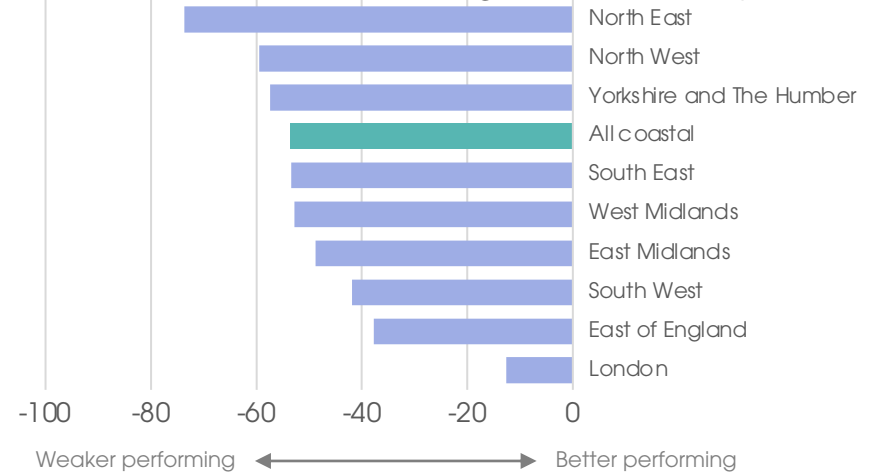
Average rating of Mission 8 headline metrics

England, local authority districts



Average rating of all headline metrics for which local authority district level data are available

England, local authority districts



Examining metrics at a more granular level

In this section, we have mapped the performance of coastal authorities on each of the Levelling Up metrics for which local authority district level data is available. Performance is compared with other geographies including London, the South East and non-coastal areas to establish the scale of need for Levelling Up.

Communities in need of Levelling Up

Not all coastal areas are the same and the challenges they face are varied, but analysis of government's chosen metrics shows the need for Levelling Up in England's coastal communities.

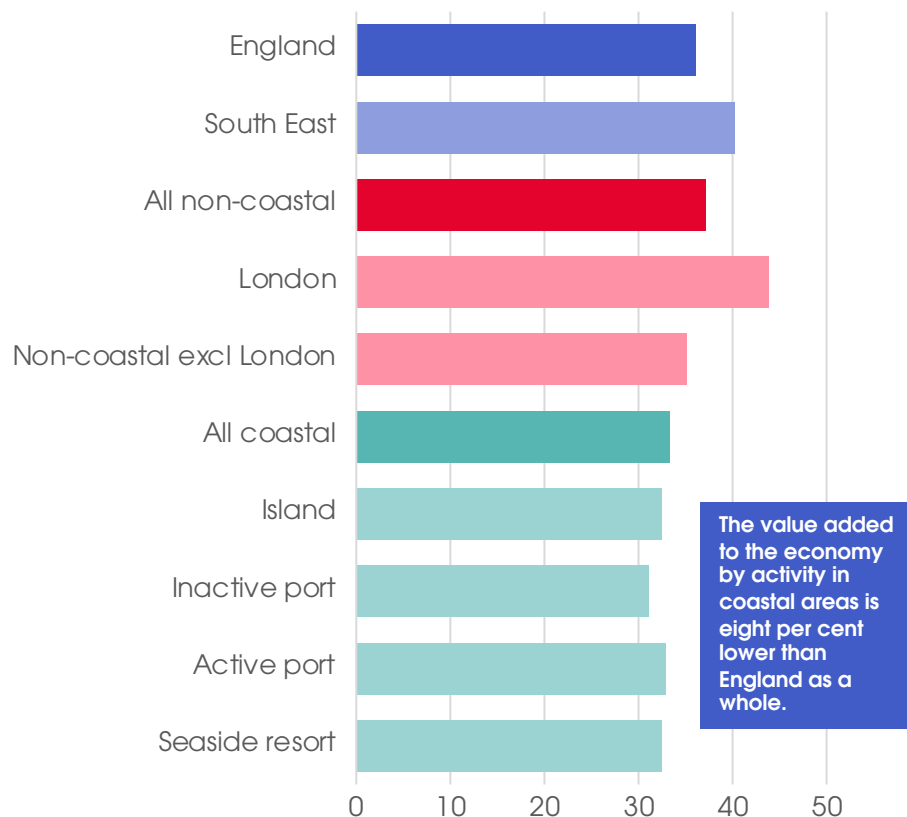
To analyse the performance of coastal communities on the Levelling Up metrics, we have split England's local authority districts into different categories using the Department for Business, Energy and Industrial Strategy and Office for National Statistics' classifications.

While the results do not represent the performance of every port location, island or seaside resort, they provide a helpful indicator for the average authority in each category.

Systematically evaluating the different categories of coastal and comparing them to the performance of London and the South East helps to establish any Levelling Up gap that exists, as well as its size.

In order to assess coastal performance, **we have evaluated all of the Levelling Up metrics** for which data are available at lower-tier authority level. Where data are only collected at a higher level, are missing significant data points, or where the datasets have yet to be determined, it was not possible to evaluate some metrics.

Gross value added per hour worked
England, local authority districts, 2020, £



Income and earnings are lower in coastal areas

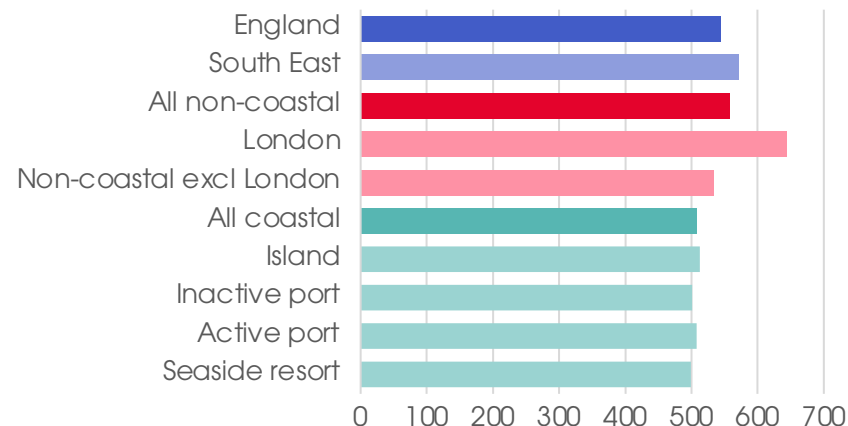
Mission 1 in the Levelling Up White Paper includes the aim that by 2030, pay will have risen in every area of the country, with the gap between the top performing and other areas closing.

Workers in coastal areas receive an average of **£50 less in gross weekly pay** at the median compared with those in non-coastal areas. Nearly one in five coastal jobs are below the living wage – a greater proportion than England overall. Coastal gross domestic household income per capita is nearly **£3,000 lower than non-coastal** income, and £10,000 lower than London.

If government is to meet its Mission 1 objectives, it will need to support schemes to grow wages in coastal communities, or risk leaving them behind.

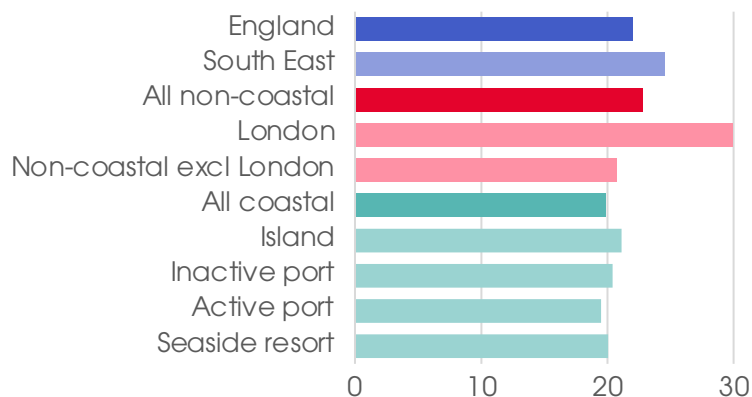
Mission 1 metric: Gross median weekly pay

England, local authority districts, 2022, £



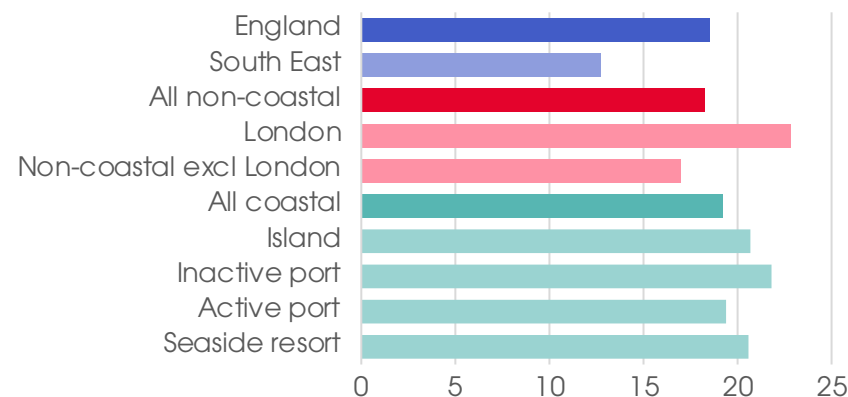
Mission 1 metric: Gross Domestic Household Income per capita

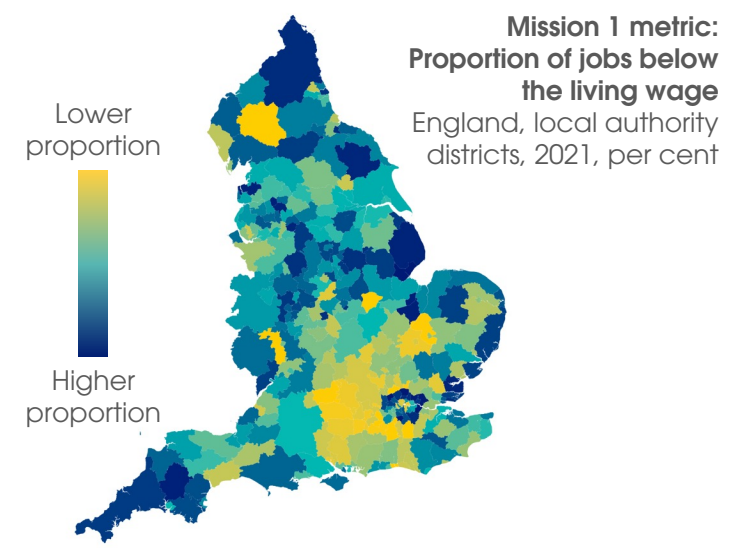
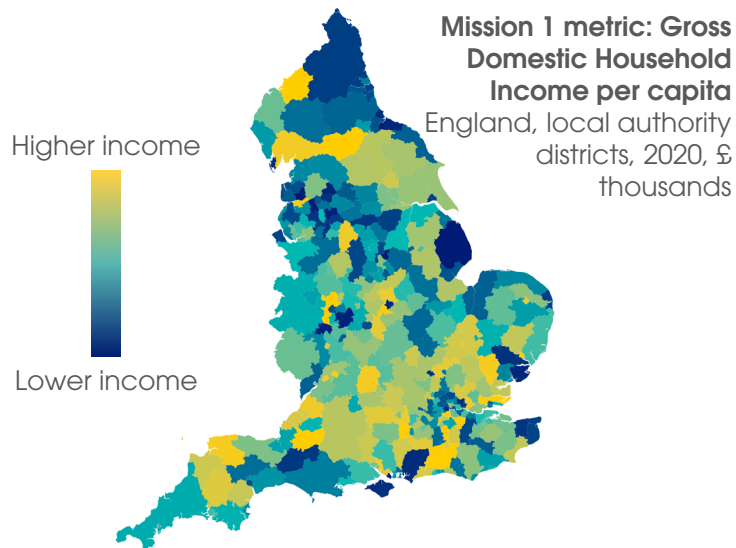
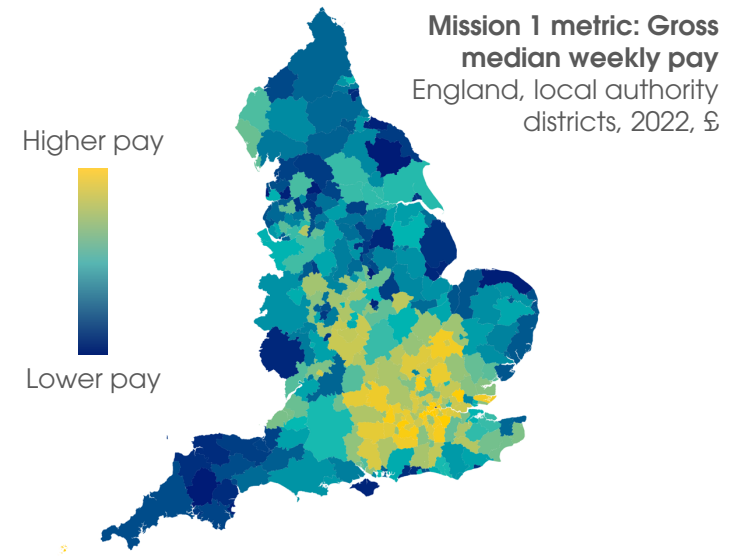
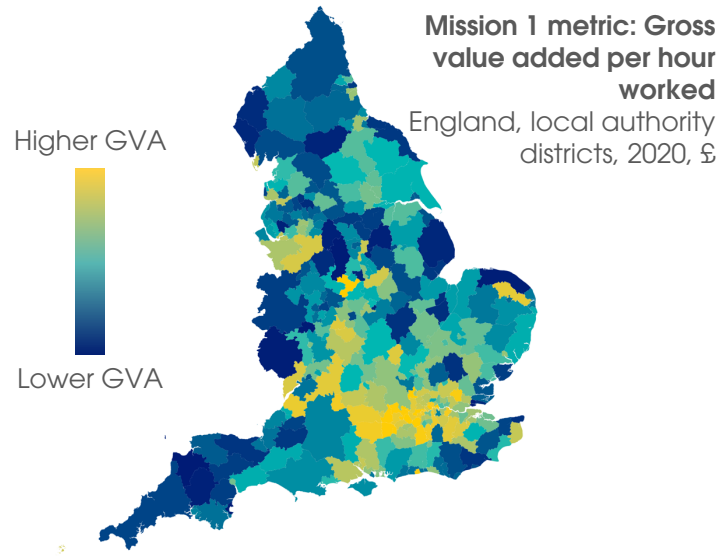
England, local authority districts, 2020, £ thousands



Mission 1 metric: Proportion of jobs below the living wage

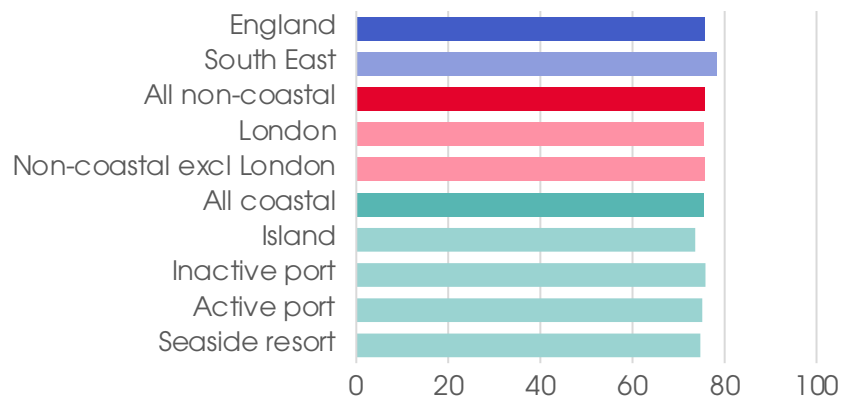
England, local authority districts, 2021, per cent





Mission 1 metric: Employment rate for working age population

England, local authority districts, 2022, per cent



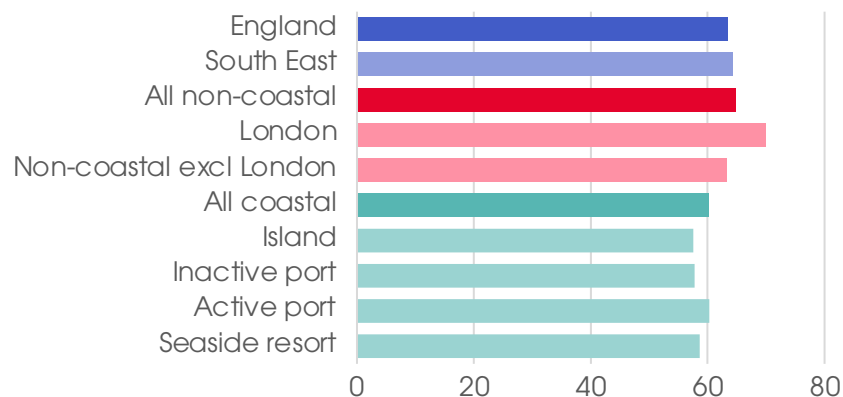
Greater share of skilled workers in coastal, but labour participation rate is less

Mission 1 includes the same aims for narrowing the employment gap across the country. A similar proportion of the working age population are in employment in local authorities across England, but labour force participation for all residents over the age of sixteen in coastal areas is 4.5 percentage points lower in coastal than non-coastal areas.

Over all, coastal workers are eight per cent more likely to be employed in roles deemed skilled by the Levelling Up White Paper than workers elsewhere in the country (SOC 1, 2, 3 and 5 occupations). However these skilled roles do not necessarily translate to higher remuneration as the gross value added per hour worked is still low along the coast, and as a residence-based metric rather than workplace-based metric, it is possible that workers are travelling outside of their local area for work.

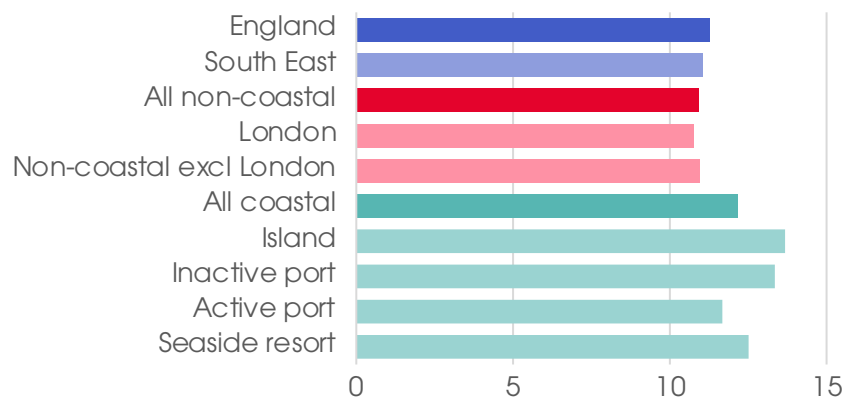
Mission 1 metric: Labour force participation rate for those aged sixteen or over

England, local authority districts, 2022, per cent

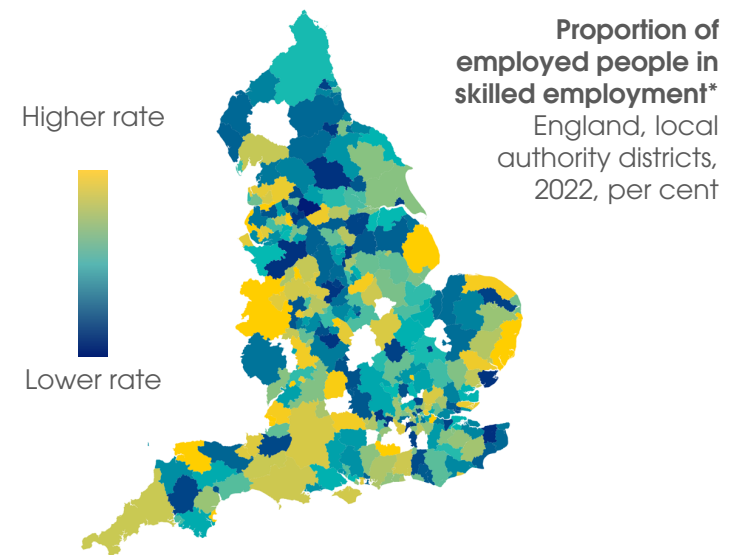
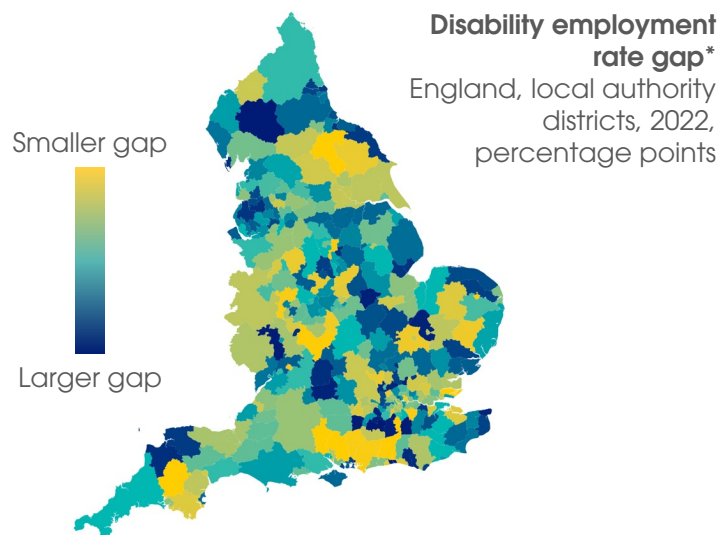
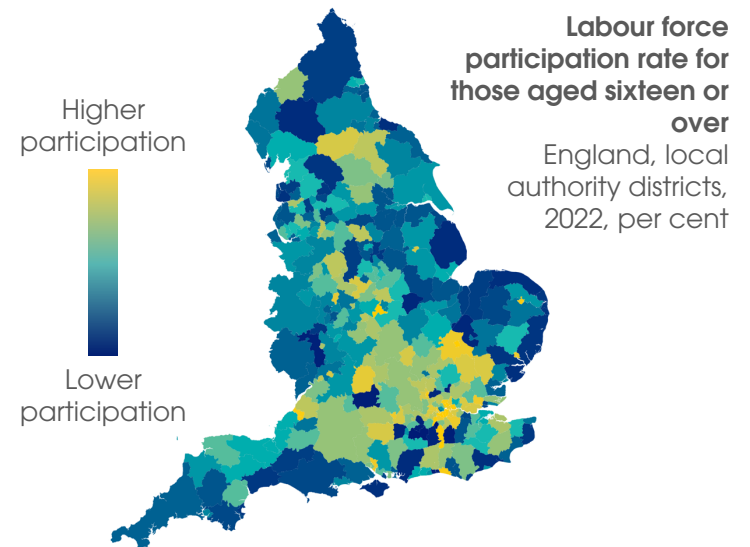
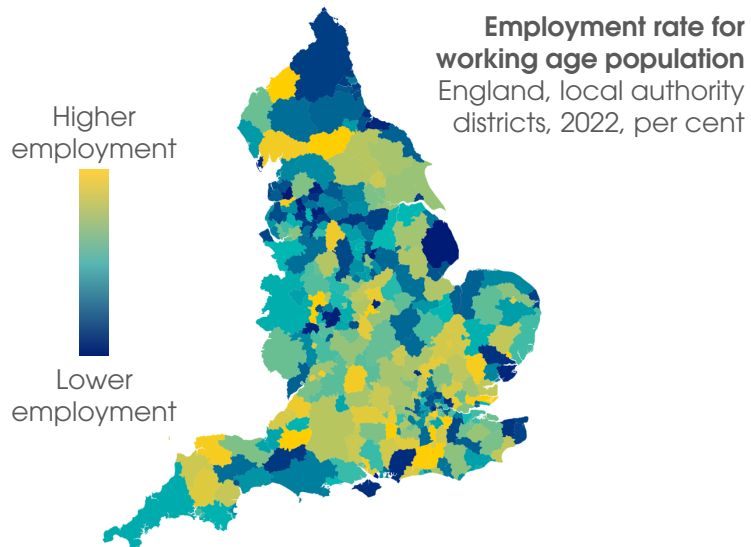


Mission 1 metric: Proportion of employed people in skilled employment*

England, local authority districts, 2022, per cent



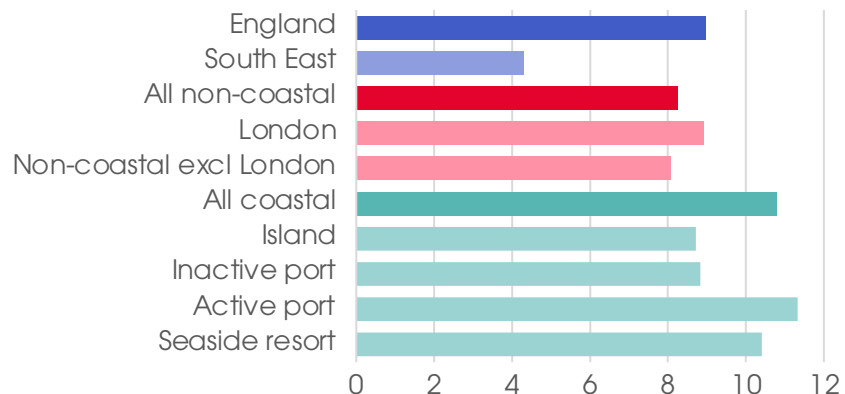
*Note: skilled employment refers to those in SOC 1, 2, 3 and 5 occupations (managers directors and senior officials, professional occupations, associate professional and technical occupations and skilled trades occupations; Source: Office for National Statistics



*Note: data unavailable for some local authorities; Source: Office for National Statistics

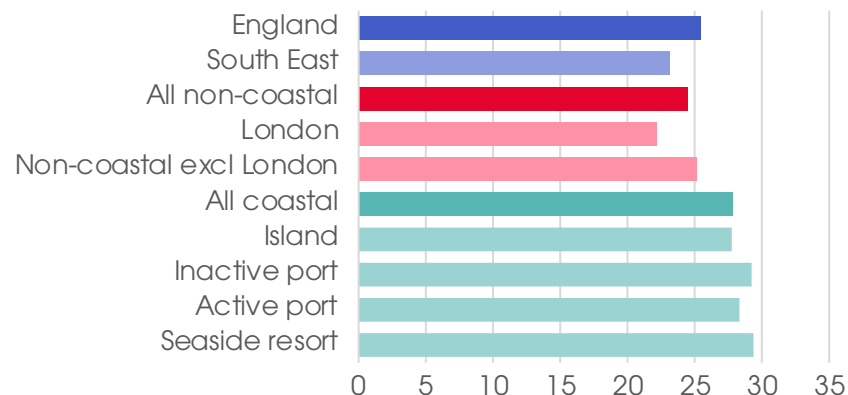
Mission 3 metric: Proportion of children in workless households

England, local authority districts, 2021, per cent



Mission 3 metric: Disability employment rate gap

England, local authority districts, 2022, percentage points



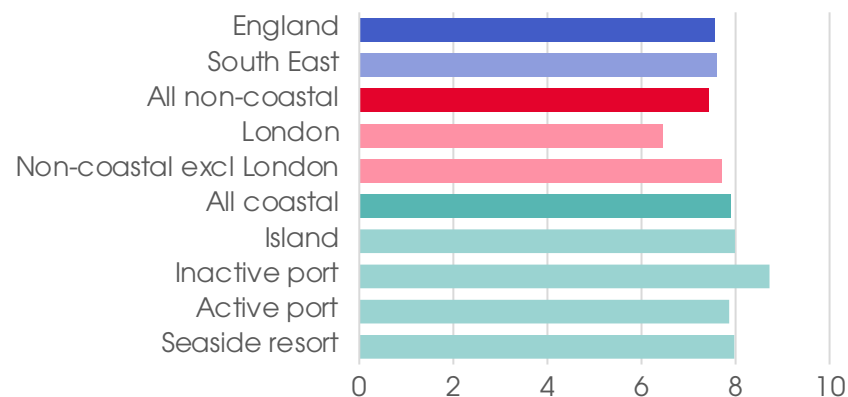
Employment metrics show gap between coastal and rest of the country

On average, more children live in workless households in coastal areas than England as a whole, and the gap in the employment rate between residents with a disability and those without is two percentage points greater in coastal areas than all of England.

Mission 3 of Levelling Up aims to improve public transport connectivity, with travel time to the nearest large employment centre being one of the measures. Given their location on the periphery, unsurprisingly coastal workers face longer travel times on average. Difficulty in accessing jobs for those unable to drive, particularly in areas with a poor or no public transport, can contribute to the lack of labour force participation, along with a lack of digital connectivity.

Mission 3 metric: Average travel time in minutes to reach nearest large employment centre

England, local authority districts, 2019, minutes

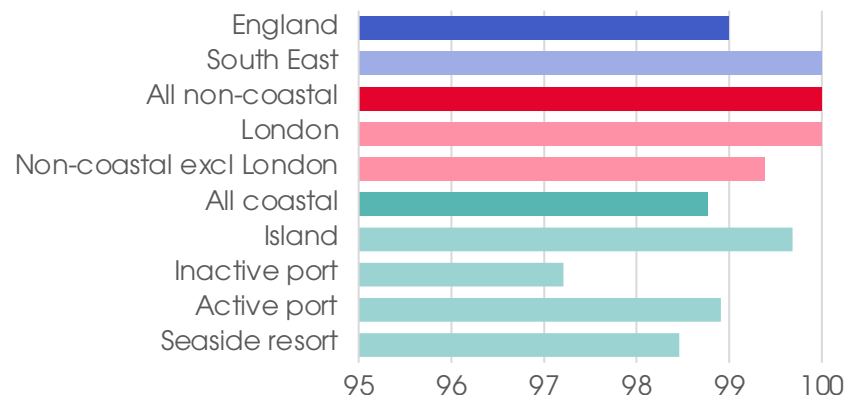


Digital connectivity metrics show coastal areas are behind non-coastal areas

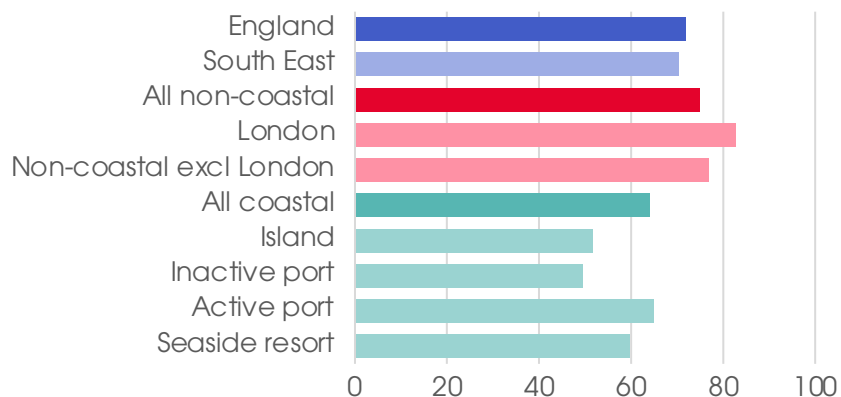
Mission 4 of the Levelling Up White Paper aims to have nationwide gigabit capable broadband and 4G coverage, with 5G coverage for the majority of the population, by 2030. Although gigabit capable broadband and 4G coverage are often categorised together in the White Paper, their policies for government intervention are quite different, with focus directed more towards gigabit capable broadband.

Around three per cent of coastal areas have no reliable indoor mobile phone signal, rising to six per cent in rural coastal areas.

Mission 4 metric: Percentage of 4G coverage by at least one mobile network provider
England, local authority districts, 2022, per cent



Mission 4 metric: Percentage of premises with gigabit capable broadband
England, local authority districts, 2022, per cent



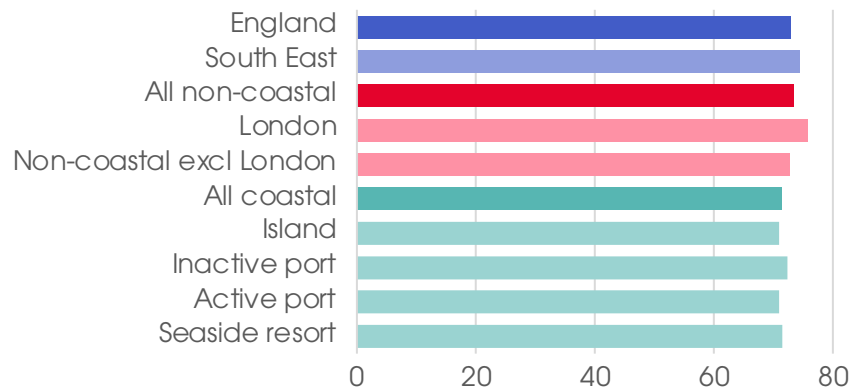
Coastal communities are at risk of being left behind in terms of digital connectivity

Coastal communities have less premises with gigabit capable broadband than non-coastal communities and England as a whole. Coastal areas also have a lower proportion of areas receiving 4G signal from at least one mobile network provider, than non-coastal communities.

With many communities brought together through digital networks, coastal's digital gap impacts not just daily activity for residents, but has knock-on effects for levels of tourism and the operation of micro and small businesses.

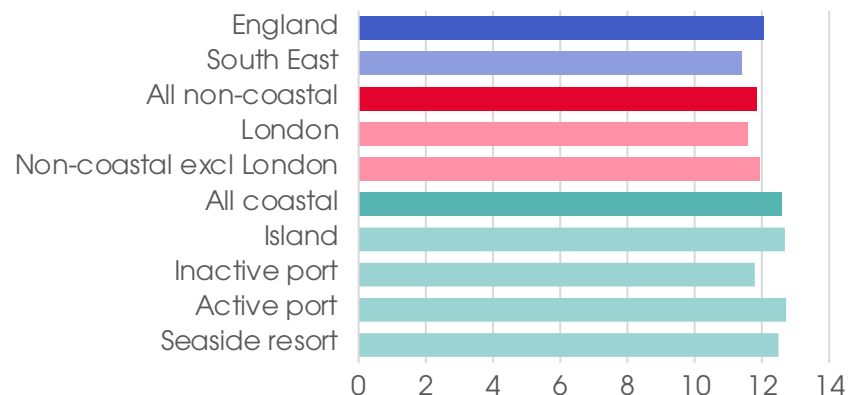
Mission 5 metric: Percentage of people achieving GCSEs or equivalent in English and maths by age nineteen

England, local authority districts, 2021, per cent



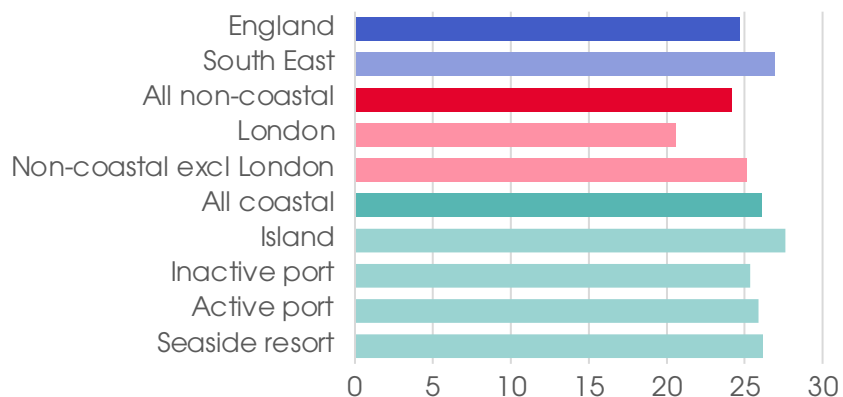
Mission 5 metric: Persistent absences for pupils in schools

England, local authority districts, 2021, per cent



Mission 5 metric: Persistent absences for pupils eligible for free school meals in schools

England, local authority districts, 2021, per cent

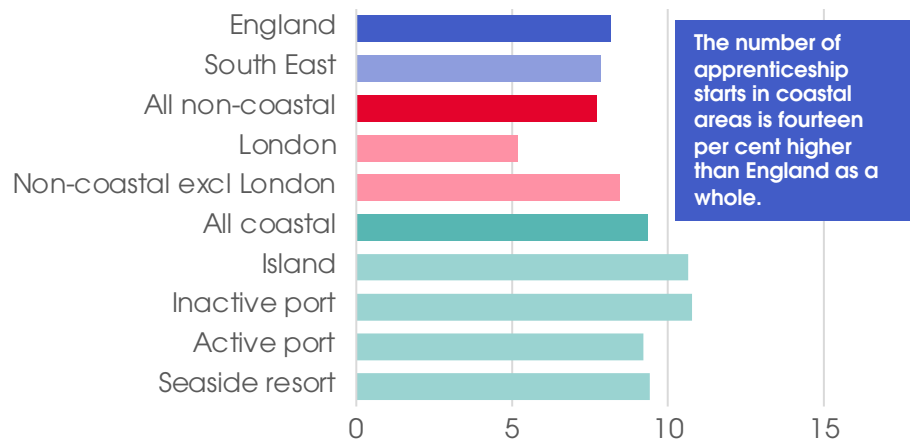


Gap in coastal school attainment

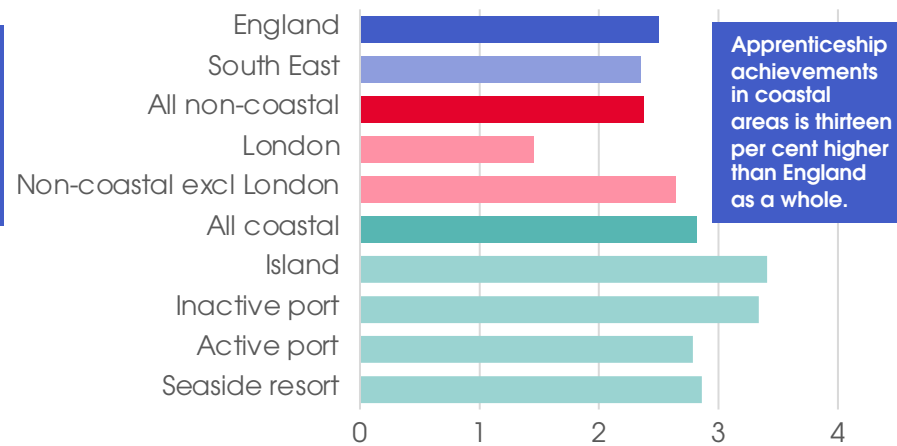
Improving standards in reading, writing and maths as set out in Mission 5 of the Levelling Up White Paper will require targeted support for young people living on the coast.

The proportion of pupils achieving GCSE level qualifications in English and mathematics by age nineteen is two percentage points lower in coastal areas than non-coastal areas. For the academic year 2021 to 2022, attainment 8 scores (the metric used for pupils finishing key stage four) of 14-16 year olds averages 47 points in coastal areas, as opposed to 49 points in non-coastal areas. Coastal school students are more likely to be persistently absent (defined as being absent from more than ten per cent of lessons).

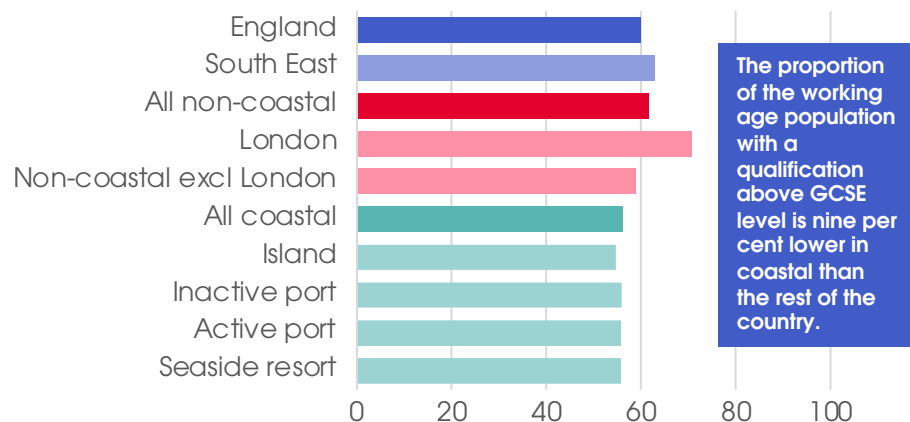
Mission 5 metric: Number of starts on apprenticeships per 1,000 residents
England, local authority districts, 2022



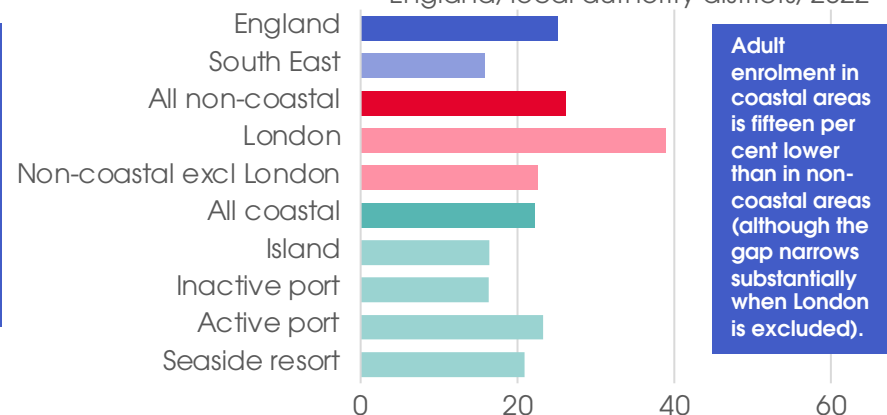
Mission 5 metric: Number of achievements on apprenticeships per 1,000 residents
England, local authority districts, 2022



Mission 5 metric: Proportion of working age population with level three qualifications or above
England, local authority districts, 2021, per cent



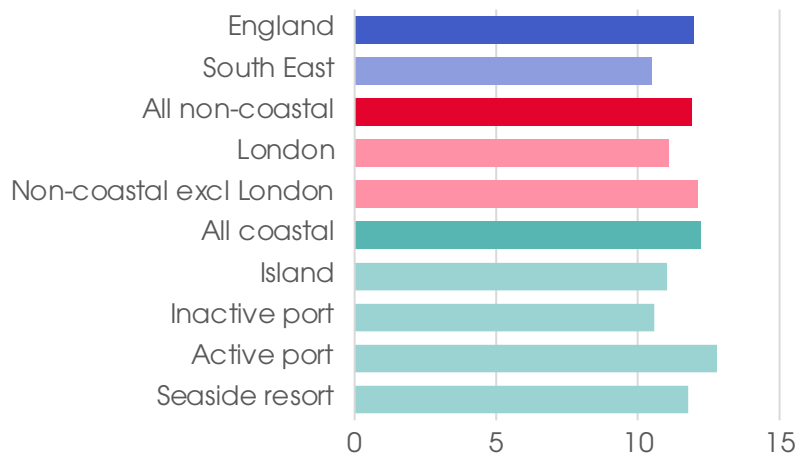
Mission 5 metric: Further education* and skills enrolments by those aged nineteen or over per 1,000 residents
England, local authority districts, 2022



*Note: Further education is defined as any study after secondary education that is not part of higher education. Source: Department for Education

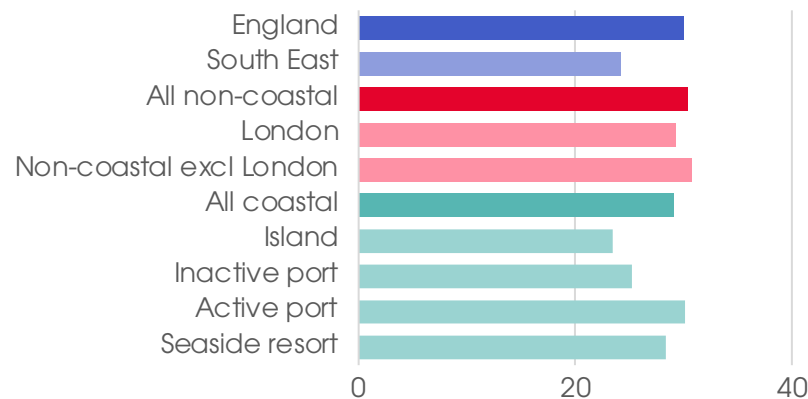
Mission 7 metric: Smoking prevalence in adults

England, local authority districts, 2020, per cent



Mission 7 metric: Under 75 mortality rate from cardiovascular diseases considered preventable per 100,000 population*

England, local authority districts, 2020, per cent



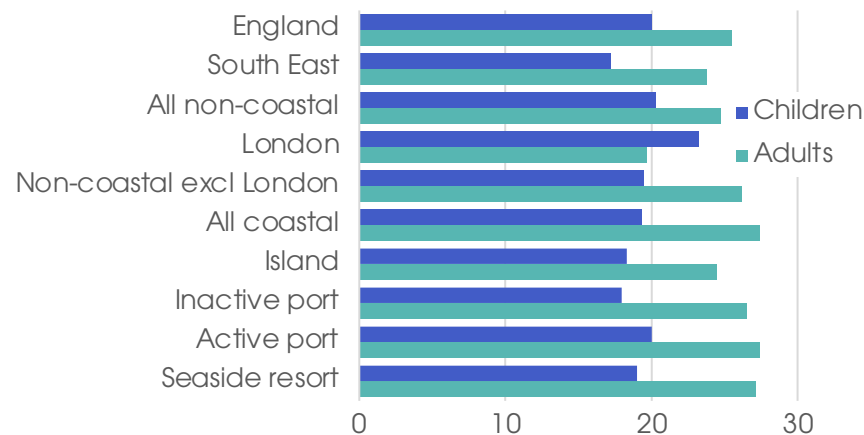
Cardio health within coastal communities is not fully captured in Levelling Up metric

The cardiovascular disease metric does not include all the underlying causes of death relating to the circulatory system, and as such fails to paint the true picture of cardio health within coastal communities.

Chief Medical Officer Professor Sir Chris Whitty’s report, ‘Health in Coastal Communities’, details the key health challenges facing coastal communities. There is disparity between the data used in that report and the data used for the Levelling Up metric – the former uses crude NHS Quality and Outcomes Framework data, which is provided on a voluntary basis by GP practices in England, whereas the latter uses age standardised data to allow populations with different age profiles to be compared.

Mission 7 metric: Obesity prevalence in children and adults

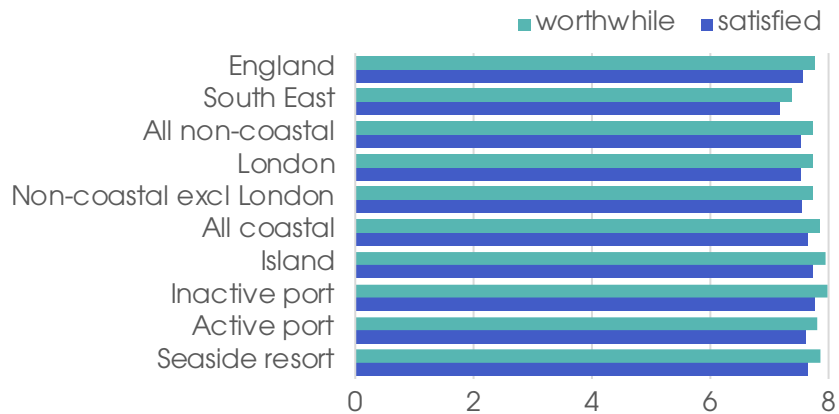
England, local authority districts, 2020, per cent



*Note: International classification of diseases (ICD) codes included: I20-26, I42.6,I71, I80.1-80.3, I80.9, 82.9. Source: Office for National Statistics (top left); Public Health England (top right and bottom left)

Mission 8 metric: Average rating of those that feel the things they do in life are worthwhile and average rating of those that feel satisfied about their lives

England, local authority districts, 2020, score



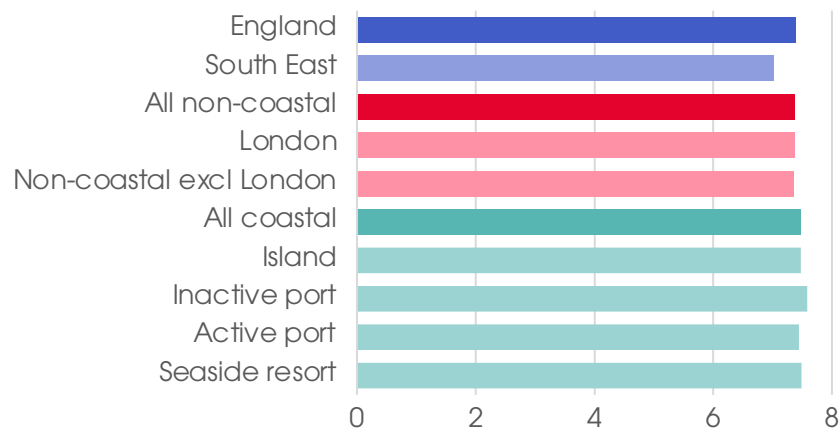
Wellbeing metric uses data not designed to rank local authorities against one another

Mission 8 in the White Paper is measured on the responses to an Office for National Statistics survey, rather than official medical data. This survey is subjective, has a small sample size and has large confidence intervals estimates, meaning it is unclear where the true values lie.

As such, the Office for National Statistics advises that this data should not be used to rank local authorities against each other, which is precisely what this metric does. Rather, the estimates from the Office for National Statistics' personal wellbeing survey are for the purpose of local authorities to track their own data over time and to only look at other local authorities with a similar population size and set-up.

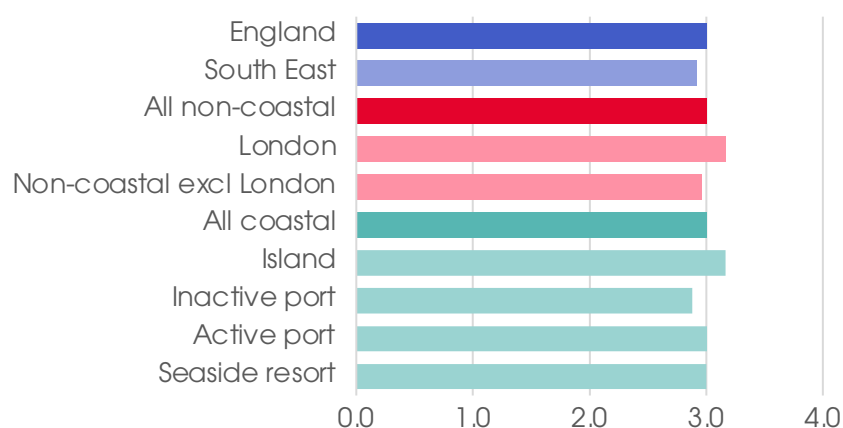
Mission 8 metric: Average rating of those that felt happy yesterday

England, local authority districts, 2020, score



Mission 8 metric: Average rating of those that felt anxious yesterday

England, local authority districts, 2020, score



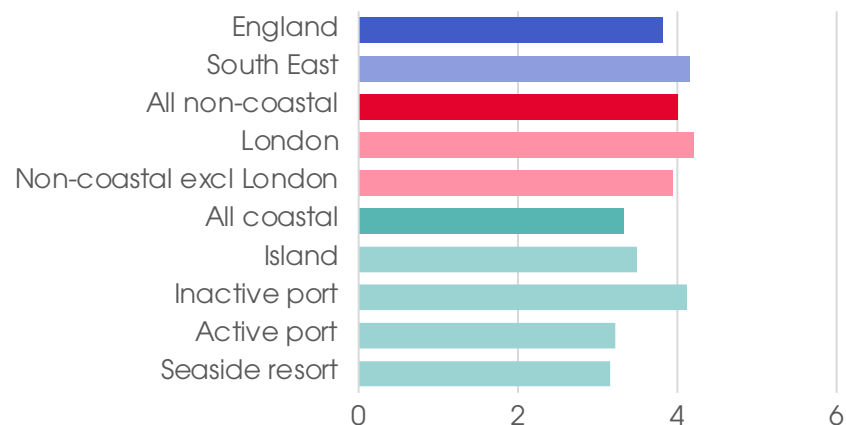
Differences in performance between coastal categories shows areas under different pressures

Variations in life expectancy differ more between categories of coastal than between coastal and non-coastal. Men and women living in a district with an island can expect to live up to two years longer than those in other coastal areas.

The housing stock in coastal areas is growing more slowly than the country as a whole, with the number of dwellings per resident seventeen per cent lower than in non-coastal areas. Some peripheral locations struggle in particular with the viability of new build dwellings, as lower land values are less attractive to private sector builders. With additional pressures coming from holiday lets and second homes, seaside resorts saw the lowest rates of additions to the housing stock in 2021. Inactive ports, however, performed similarly to London and the South East.

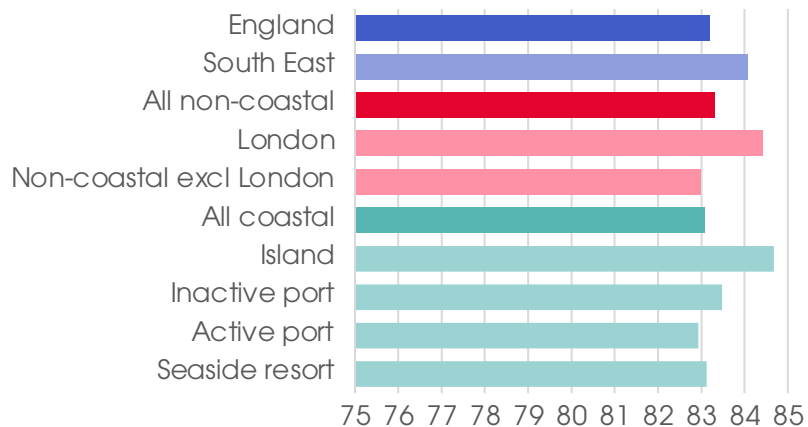
Mission 10 metric: Net additions to the housing stock per 1,000 residents

England, local authority districts, 2021, dwellings



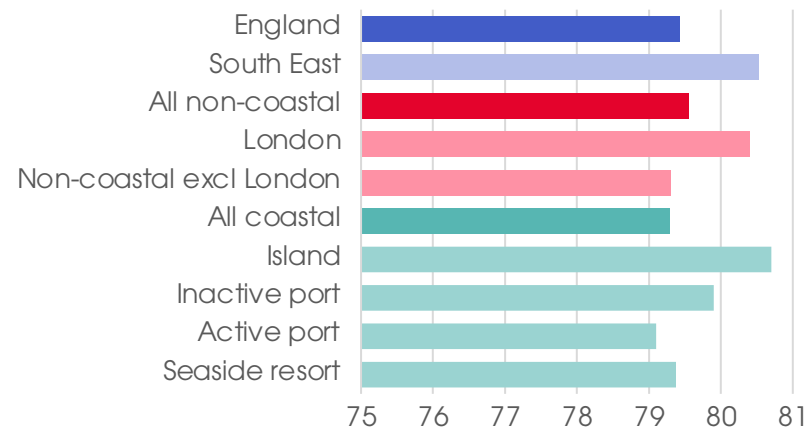
Mission 7 metric: Life expectancy at birth: women

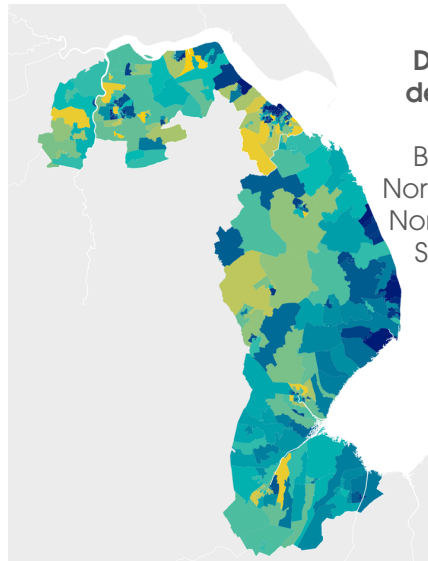
England, local authority districts, 2020, years



Mission 7 metric: Life expectancy at birth: men

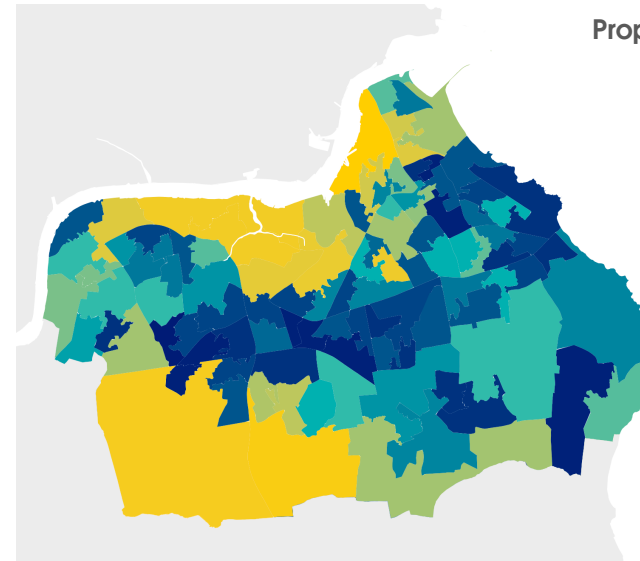
England, local authority districts, 2020, years



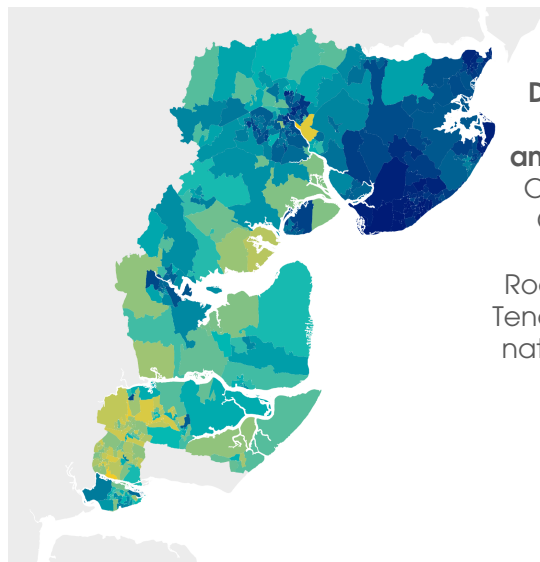
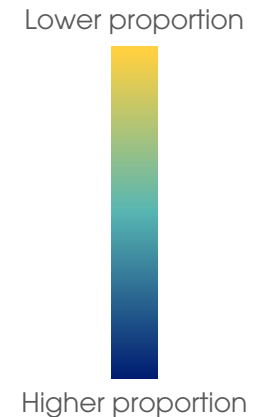


Index of Multiple Deprivation: income deprivation affecting children

Boston, East Lindsey, North East Lincolnshire, North Lincolnshire and South Holland, 2019, national scale



Proportion of workers that work part-time
South Tyneside, 2011, national scale



Index of Multiple Deprivation: mood and anxiety score

Castle Point, Colchester, Maldon, Rochford and Tendring, 2019, national scale

Where possible, government should be tracking performance at LSOA

Even within local authorities, the differences in performance can be significant. While it is not possible to record data at Lower Level Super Output Area for all metrics, where data already exists or where it could feasibly be collected, government should aim to do so.

While local data will not capture all deprivation, for example people can be living in one area and working in another, analysing metrics within the Levelling Up framework at as granular a level as possible would better help to identify pockets of deprivation, and ensure support can be targeted to those neighbourhoods most in need.

An aerial photograph of a rugged coastline. The water is dark blue-green, and the rocks are grey and brown. Several kayakers are visible in the water. The text "Part 2: Demonstrating coastal disadvantage" is overlaid on the left side of the image in white, bold, sans-serif font. A vertical white line is positioned to the right of the text.

Part 2: Demonstrating coastal disadvantage

The metrics chosen by government are partial, and do not fully capture levels of need and deprivation in coastal communities. In this section we document our broader assessment of the disadvantages facing coastal communities, over and above those listed in the Levelling Up White Paper. The analysis of other social and economic indicators including the Index of Multiple Deprivation, provides a more accurate picture of local economies and levels of need.

Real Levelling Up requires other metrics

While not every metric can be considered for Levelling Up, there are important factors missing from the framework.

When the Department for Levelling Up, Housing and Communities published its White Paper, it could not have foreseen the economic turmoil on the horizon. Russia's invasion of Ukraine and the fallout from the government's 'mini-budget' coming after two years of global pandemic, has heaped pressure on the United Kingdom economy. With inflation at its highest level in decades, interest rates being raised at an unprecedented pace, the nation heading into a lengthy recession, and the impact of a changing climate becoming ever more tangible, the financial strain on households is only going to increase. Even prior to these events, the metrics chosen for Levelling Up were partial and did not fully capture levels of need in coastal communities.

We have identified the limits of the current metrics and analysed social and economic indicators in addition to those listed in the White Paper to help provide a more accurate picture of local economies and levels of need. We have also considered additional metrics which government should consider collecting data for, particularly in the context of the ongoing cost of living crisis.

We have not included metrics that consider the negative effects of declining coastal and marine environments in juxtaposition with the socio-economic impacts. Positive impacts can be achieved in improving coastal and marine habitats across climate resilience, job creation and skills provision and the tourism sector. These are broadly discussed in Part 3, and it is recommended that future analysis is completed to identify appropriate metrics and support further research to create metrics that can articulate both the threat and the opportunity to coastal communities.

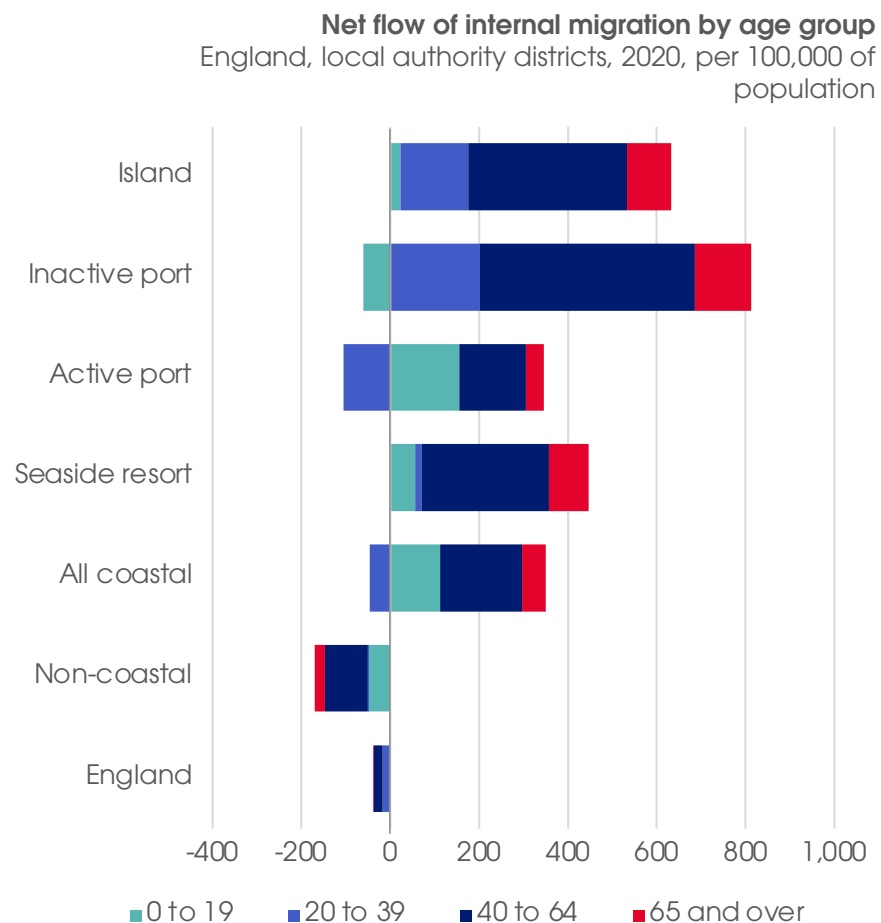
<p>Boosting productivity, pay, jobs and living standards by growing the private sector</p>	<ol style="list-style-type: none"> 1. Pay, employment productivity and global competitiveness will have increased across the UK, and gap from worst to best performing to narrow. 2. Public investment in R&D outside the Greater South East will have increased by 33-40 per cent. 3. Local public transport connectivity across the country will be significantly closer to the standards of London, with improved services, simpler fares and integrated ticketing. 4. The UK will have nationwide gigabit-capable broadband and 4G coverage, with 5G coverage for the majority of the population.
<p>Spreading opportunity and improving public services</p>	<ol style="list-style-type: none"> 5. The number of primary school children achieving the expected standard in reading, writing and maths will have significantly increased. 6. The number of people successfully completing high-quality skills training will have significantly increased in every area of the UK. 7. The gap in Healthy Life Expectancy (HLE) between local areas where it is highest and lowest will have narrowed, and by 2035 HLE will rise by 5 years. 8. Well-being will have improved in every area of the UK, with the gap between top performing and other areas closing.
<p>Restoring a sense of community, local pride and belonging</p>	<ol style="list-style-type: none"> 9. Pride in place, such as people's satisfaction with their town centre and engagement in local culture and community, will have risen in every area of the UK, with gap to top performing closing. 10. Renters will have a secure path to ownership with the number of first-time buyers increasing in all areas; and number of non-decent rented homes to have fallen by 50%. 11. Homicide, serious violence, and neighbourhood crime will have fallen, focused on the worst-affected areas
<p>Empowering local leaders and communities</p>	<ol style="list-style-type: none"> 12. Every part of England that wants one will have a devolution deal with powers at or approaching the highest level of devolution and a simplified, long-term funding settlement.

Objectives and missions set out in the Levelling Up White Paper

Boosting productivity, pay and living standards

For each of the metrics outlined by government in the White Paper, we have identified their limits in supporting the overall objectives of Levelling Up. The next section considers additional metrics which would help support the Levelling Up aim of boosting productivity, pay and living standards.

Net flow of older people into coastal areas



England's coastal communities have long been popular retirement destinations, but as life expectancy has increased, the cost to councils and the health services of looking after an aging population has grown

Internal migration data by age group shows the extent to which coastal authorities are popular relocation spots. For all categories of coastal, there was a net inflow of residents aged 40 and above in 2020. This impacts the costs of social care and non-statutory budgets. For those coastal authorities who saw a net outflow of residents, it was for the 20 to 39 or nineteen and under age groups. Young people leave to study courses not available on the coast, in search of better job or earning opportunities, or because of a lack of locally affordable housing, for example. The migration of younger people and workers can have detrimental impacts on communities, not least on the workforce as employers have a smaller pool of workers to hire from. In the many popular tourist destinations which previously relied on foreign workers to plug the vacancy gap, the changes to immigration rules post-Brexit are being acutely felt.

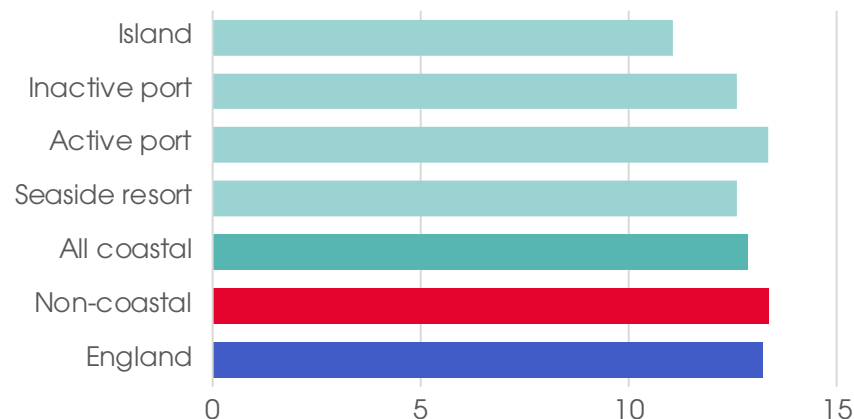
The inclusion of migration statistics within the Levelling Up framework would help demonstrate the areas which are likely to require assistance in attracting workers. Age group statistics are also essential for supporting coastal residents during the ongoing cost of living crisis – data from the Office for National Statistics 2021 census has revealed that 699,500 people live in a home without central heating and of this group, one in ten are over 65 years old with long-term health conditions.

Cost of living struggles exacerbated on the coast

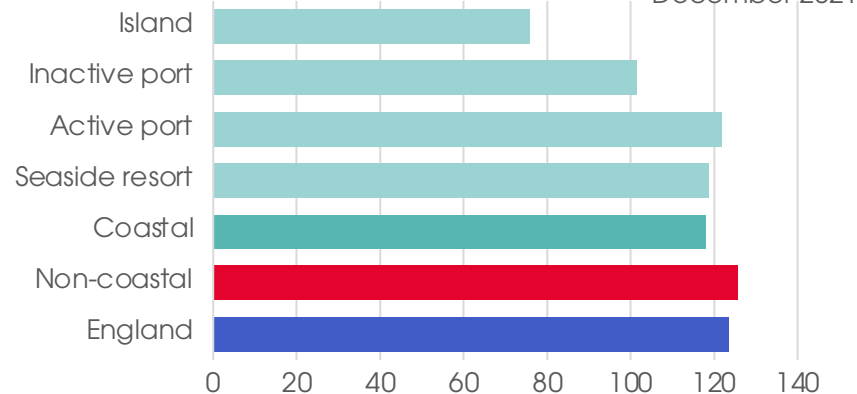
The proportion of households in fuel poverty in 2020 was around the same in coastal authorities as the rest of the England. But since then, we have seen an unprecedented rise in gas and electricity bills necessitating financial support for households.

Many living on the periphery may not have access to cheaper mains gas, and instead rely on electricity or oil to heat their homes. This, along with other hidden costs like the need to own a car where public transport is unavailable and a lack of electric vehicle charging points, mean cost of living pressures will be even more acutely felt by coastal residents.

Proportion of households in fuel poverty
England, local authority districts, 2020, per cent



Number of Energy Company Obligation (ECO) measures installed per 1,000 households
England, local authority districts, January 2013 – December 2021

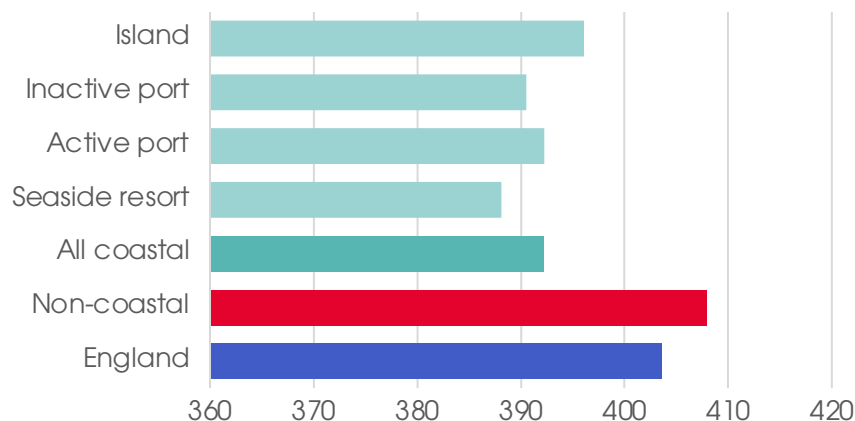


Fewer energy efficiency measures installed in coastal areas

Energy consumption varies little geographically, yet per 1,000 households, coastal areas have received eight less Energy Company Obligation measures than non-coastal areas over the last nine years. Designed to target fuel poverty, Energy Company Obligation is a government energy efficiency scheme. This includes the affordable warmth scheme, which helps low-income and vulnerable households replace faulty central heating boilers or storage heaters.

According to the National Institute for Health and Care Excellence, there are 28,000 excess deaths each year as a result of living in cold homes. Metrics relating to energy efficiency measures would help support Levelling Up and improve living standards for coastal communities during the cost of living crisis.

Gross weekly pay for employees in the lowest income decile
England, local authority districts, 2022, £



Important to not just consider median wages

The fall in real disposable incomes over the cost of living crisis means that people in the lowest income deciles are struggling to pay for heating, for example. In much the same way that focussing on regional averages can miss deprivation at a district level, only examining median pay does not accurately represent the Levelling Up need of the lowest paid.

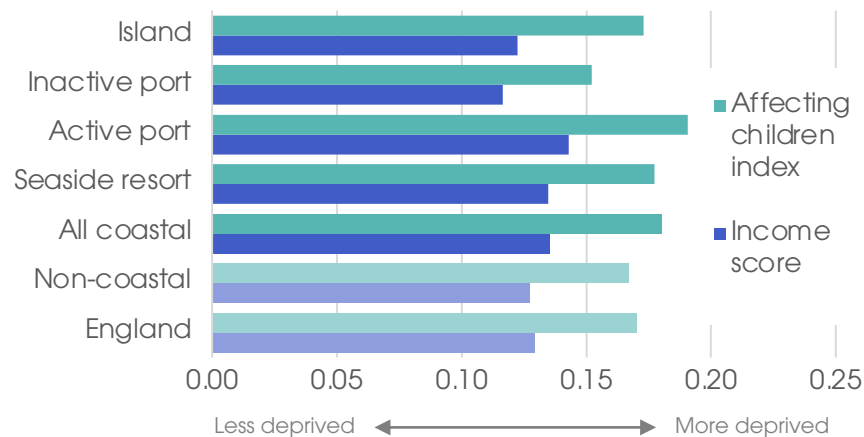
In coastal areas, employees with earnings in the bottom income decile can expect to be paid around £830 less a year than workers in a non-coastal authority. For those living in a seaside resort the gap is even greater, with employees earning around £1,000 a year less – a £1,000 that would make a huge difference towards energy bills.

Coastal struggling more with income deprivation

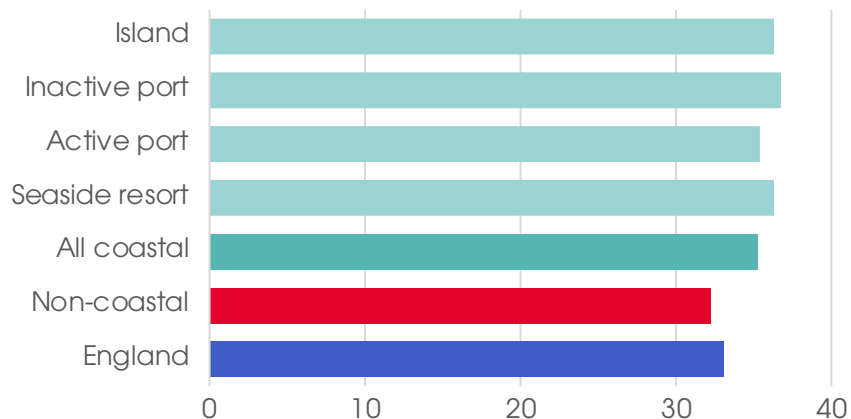
The income deprivation domain of the Index of Multiple Deprivation is derived in the main from families in receipt of benefits, both with adults in and out of work. On this measure, coastal communities are rated as more deprived than non-coastal, with neighbourhoods in active ports identified as the most deprived.

Within the objective related to improving living standards, only one of the 21 metrics directly relate to children. On the income deprivation affecting children index, government analysis shows children in coastal areas are more deprived than the national average. To support long-term and more lasting Levelling Up, the framework should consider further metrics which focus on need and deprivation amongst children.

Index of Multiple Deprivation: income deprivation affecting children index and income score
England, local authority districts, 2019, average score for LSOAs



Percentage of workers who work part-time
England, local authority districts, 2020, per cent

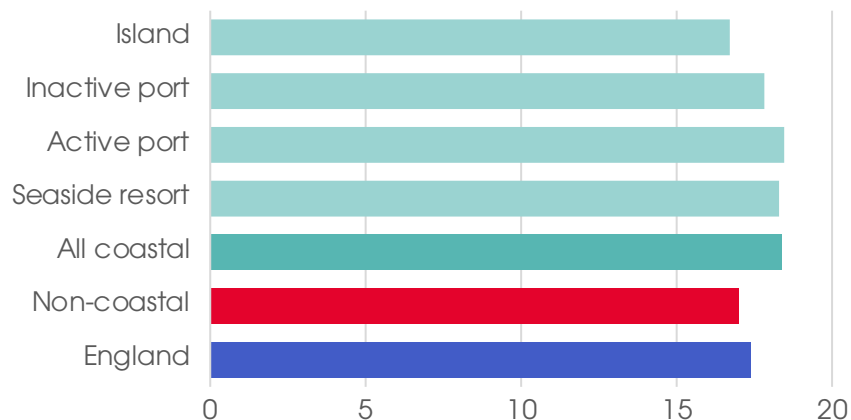


Type of jobs available varies by location

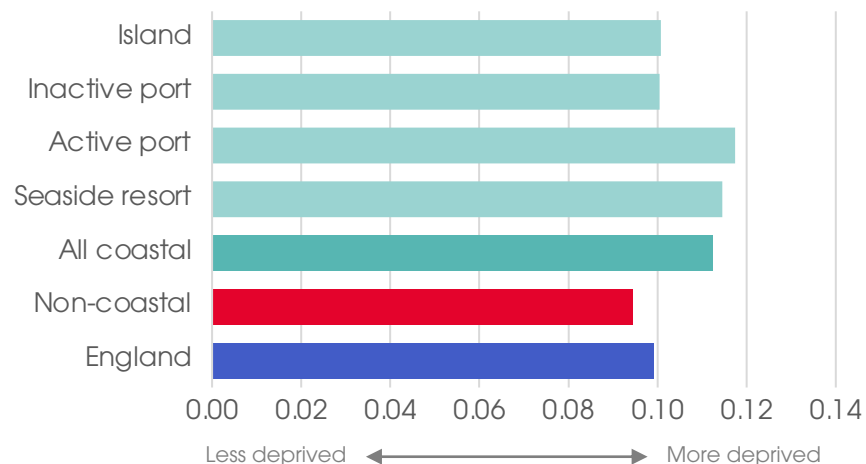
To provide support to make the jobs that are available better, it is important to consider the types and tenure of jobs that are available, not just the proportion of workers in skilled employment.

In coastal areas, for example, a greater share of workers are working part-time or are self-employed. This could be due to the nature of the jobs they do, like in tourism or hospitality, or the seasonality of the work. The metrics chosen for Levelling Up don't consider the quality of jobs, or those areas in which residents have to take on two or more jobs to secure the equivalent of a full-time wage.

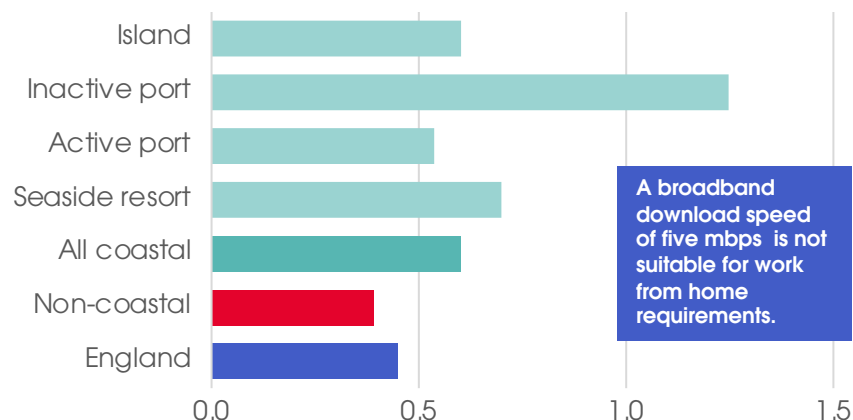
Percentage of workers who are self-employed
England, local authority districts, 2020, per cent



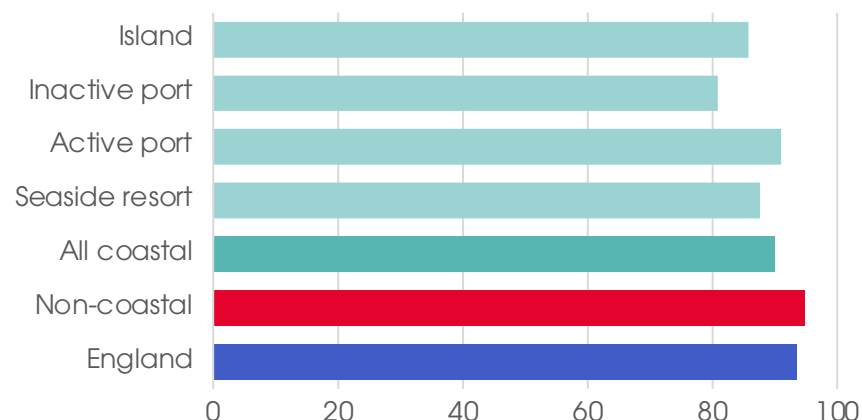
Index of Multiple Deprivation: employment score
England, local authority districts, 2019, average score for LSOAs



Percentage of households unable to receive at least five mbps broadband download speed
England, local authority districts, 2021, per cent



Percentage of outdoor areas that receive 4G signal from all four providers
England, local authority districts, 2021, per cent

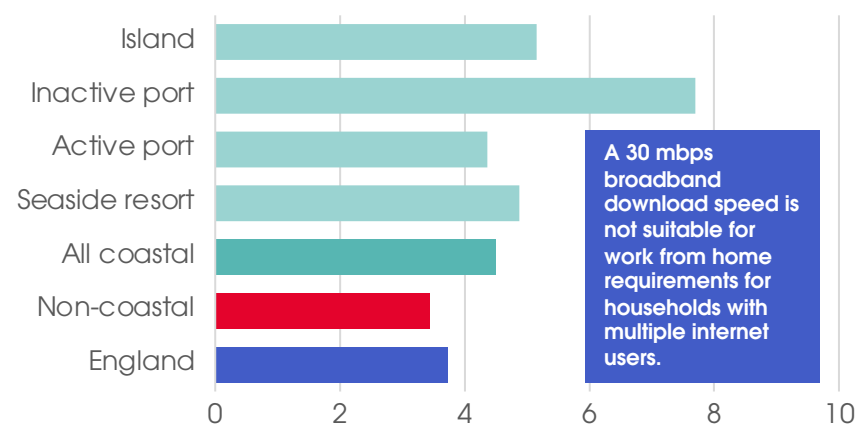


Growth limited by poor digital connectivity

The change in working practices necessitated by the pandemic look set to remain, as both workers and employers have gotten used to flexible home and hybrid working. But taking advantage of working from home requires a minimum standard of broadband, and areas unable to access minimum speeds risk missing out on attracting potentially higher earning and productive jobs. Some areas, like Kingston-upon Hull, aren't on the main BT telephone network, and instead rely on their own.

Poor broadband also disadvantages residents, as more and more everyday information and services move to online-only. While providing gigabit-capable broadband to the majority is aspirational, it is highly unlikely to come to fruition in areas where establishing and maintaining the necessary infrastructure proves too expensive. Focussing instead on delivering superfast broadband as a minimum to all premises would ensure no areas are left behind.

Percentage of households unable to receive at least 30 mbps broadband download speed
England, local authority districts, 2021, per cent

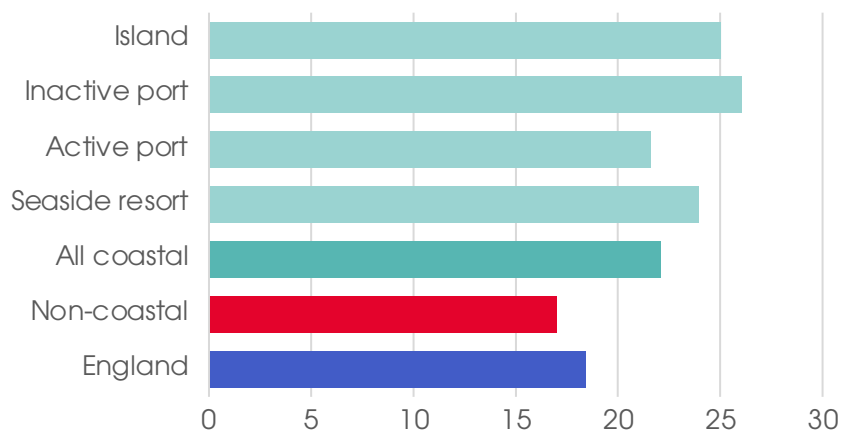


Population demographics build a picture of local economies

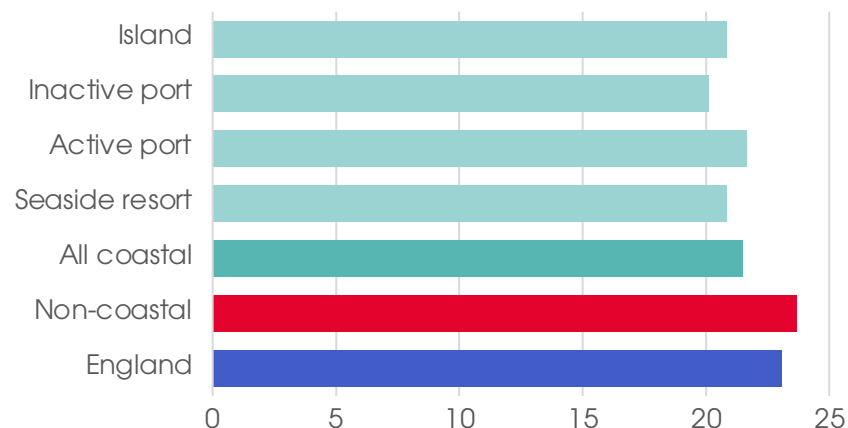
Having an understanding of the population, its limitations with regards to potential productivity growth and the cost to local and central government would be more meaningful to Levelling Up than just tracking labour force participation.

Incorporating metrics including the share of residents over the age of 65 and the proportion of the working age population that are retired would help to build a picture of local economies, and identify councils that are facing proportionally higher health and social care bills due to the greater number of older residents. This would need to be alongside a change in policy so that residents in temporary housing, for example static caravans, declared their residency. Currently, some are reliant on local services but are not included in the data as they do not have to pay council tax.

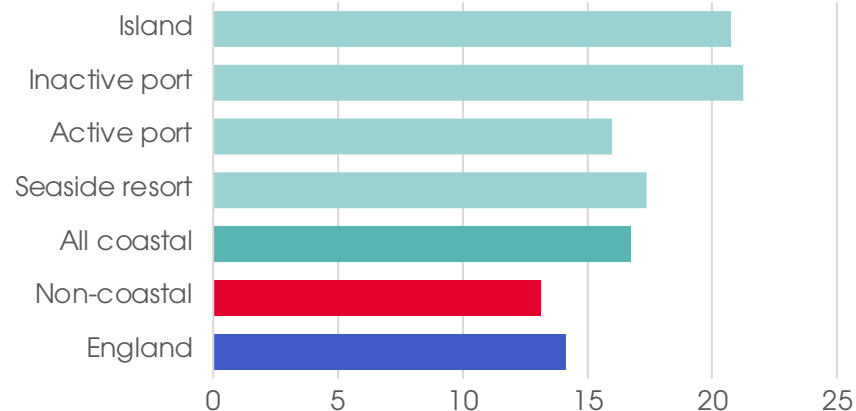
Proportion of usual residents aged 65 or over
England, local authority districts, 2021, per cent



Proportion of usual residents aged nineteen or under
England, local authority districts, 2021, per cent



Percentage of the economically inactive who are retired
England, local authority districts, 2021, per cent

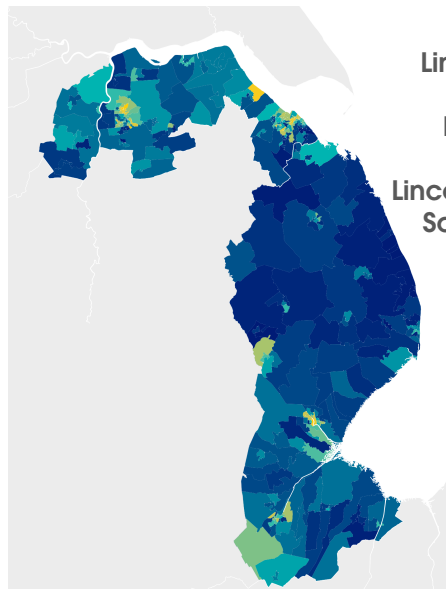
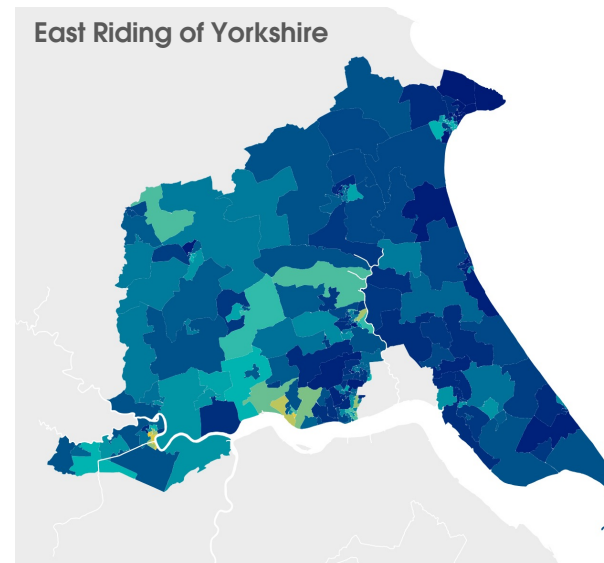
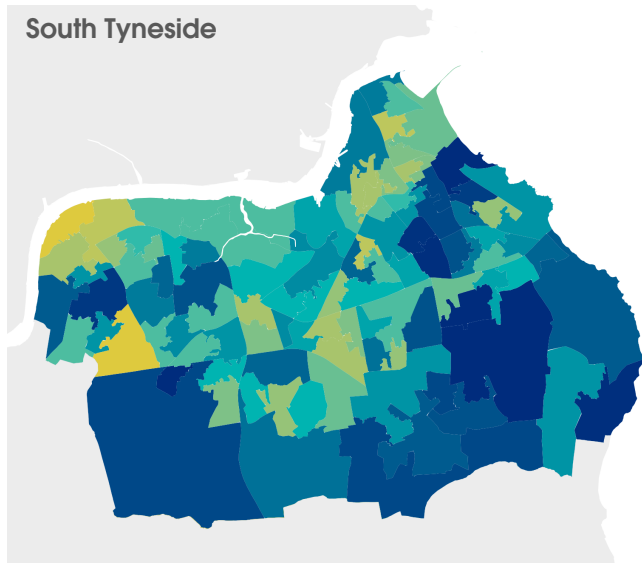


Share of the population
aged over 65
LSOAs, 2020, per cent,
national scale

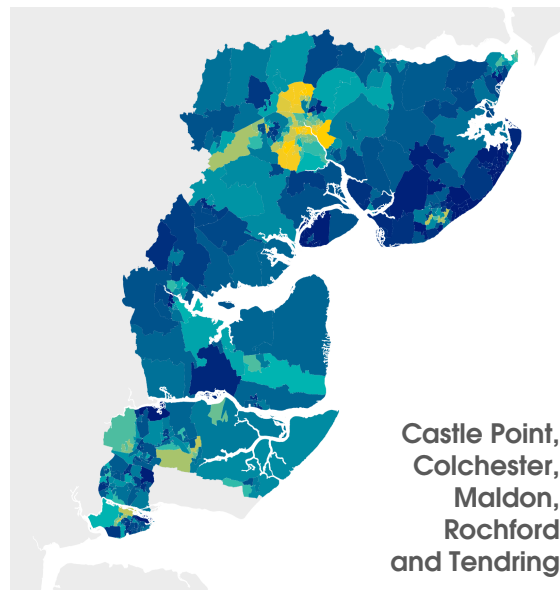
Lower proportion



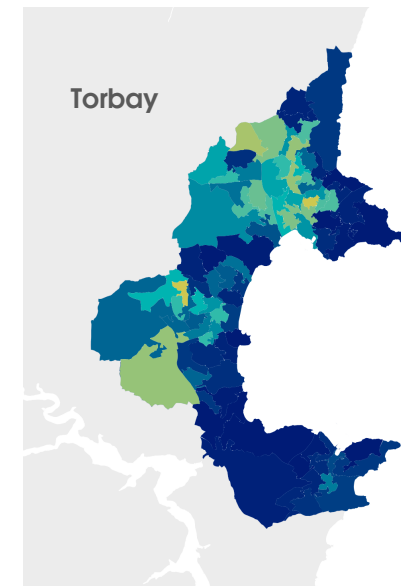
Higher proportion



Boston, East
Lindsey, North
East
Lincolnshire,
North
Lincolnshire and
South Holland



Castle Point,
Colchester,
Maldon,
Rochford
and Tendring



Limits with metrics chosen to support the Levelling Up objective of boosting productivity, pay, jobs and living standards

Mission 1 : Pay, employment productivity and global competitiveness to increase across the UK, and gap to best performing to narrow		Mission 2 : Public investment in R&D outside the Greater South East to increase by 33 to 40 per cent	
GVA per hour worked	GVA is dependent on how profits are allocated, data only considered at regional level	Business expenditure on R&D	Data only available at regional level
Gross median weekly pay	Doesn't account for distribution or those in the lowest income decile. It is an average measure of one metric of job quality, data only considered at regional level	Government funding for R&D	Data only available at regional level
Employment rate for 16-64-year olds	Fails to account for seasonal, over- and under-employment, data only considered at regional level	Percentage of businesses that are innovation active	Data is available at ITL2 level but is only being considered at regional level
Gross Disposable Household Income	Fails capture differing costs of living, data only considered at regional level	Mission 3 : Local public transport connectivity across the country will be significantly closer to the standards of London, with improved services, simpler fares and integrated ticketing	
Proportion of jobs that are low paid	Living wage is a London number or a non-London number, and doesn't account for cost of living in peripheral areas, data only considered at regional level	Usual method of travel to work by region of workplace	Data currently only available at regional level
Participation rate	Doesn't consider the share of population that are of working age and retired, data only considered at regional level	Average travel time to reach nearest large employment centre	Doesn't capture type, frequency, availability or cost of public transport links to key services
Disability employment rate gap	Doesn't account for quality, scale and value of work available, data only considered at regional level	Percentage of non-frequent bus services running on time	Data only available for 87 local authorities
Proportion of children in workless households	Fails to capture households in which only one parent works. Doesn't capture those in poor quality, insecure, temporary or seasonal work, data only considered at regional level	Average excess waiting time for frequent (bus) services	Very poor reporting, only between twelve and 30 local authorities' data available for the last six years
Proportion of employed people in skilled employment	Doesn't account for mix of jobs - some areas do not have skilled employment easily available.	Public transport trips as a proportion of total trips per year	Focus at a region level fails to capture areas with little or no public transport usage
Total value of UK exports	Exports are assigned to London, even when they are produced elsewhere. Data is available at ITL3 level but is only being considered at regional level	Mission 4 : The UK will have nationwide gigabit-capable broadband and 4G coverage, with 5G coverage for the majority of the population	
Inward and outward FDI (also repeated as Mission 2 metric)	Values for the East of England are missing from official data. Some data available at ITL2 level but is not being utilised	Percentage of premises with gigabit-capable broadband	Does not capture those premises not receiving a minimum usable download and upload speed
		Percentage of 4G (and 5G) coverage by at least one mobile network operator	'At least one' mobile provider limits choice for consumers in purchasing a contract



Metrics for which data are available but are not considered in the missions

- Average earnings in the lowest income decile
- Percentage of households in fuel poverty
- Proportion of households not on the mains gas network
- Percentage in employment that work part-time
- Rates of over- and under-employment in economically active
- 4G and 5G coverage by more than one mobile provider
- Proportion of premises with superfast broadband/ minimum download and upload speed
- Rates of internal migration
- Index of Multiple Deprivation – income, employment, income deprivation affecting children and income deprivation affecting older people scores
- Age demographics of the resident population
- Rates of self-employment
- Median pay for workers in the lowest income decile



Metrics for which data are partial or only collected at a high geographical level, or data which are not currently collected but should be

- Cost of living (regional data only)
- Rates of car ownership/ number of cars by income decile (national data only)
- Percentage of the working age population in seasonal employment (unavailable)
- Percentage of economically active that need more than one job to support themselves and dependents (unavailable)
- Frequency of public transport to access key services (unavailable)

Suggested additional metrics to support the Levelling Up objective of boosting productivity, pay, jobs and living standards in coastal areas

Spreading opportunity and improving public services

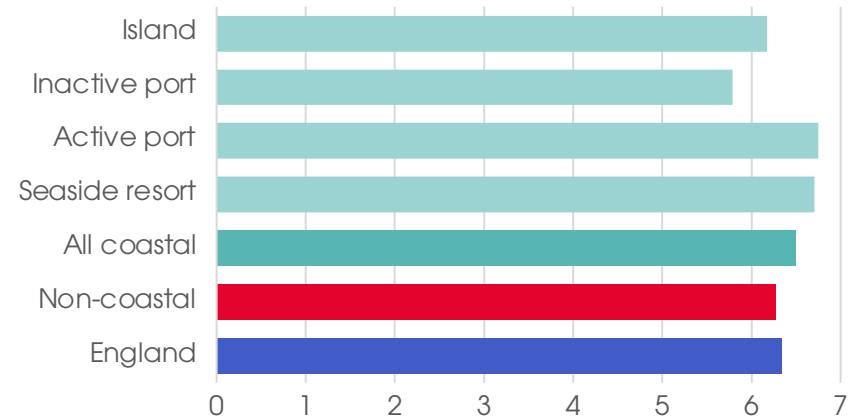
The upcoming section considers additional metrics which would help support the Levelling Up aim of spreading opportunity and improving public services.

Educational deprivation runs beyond school gates

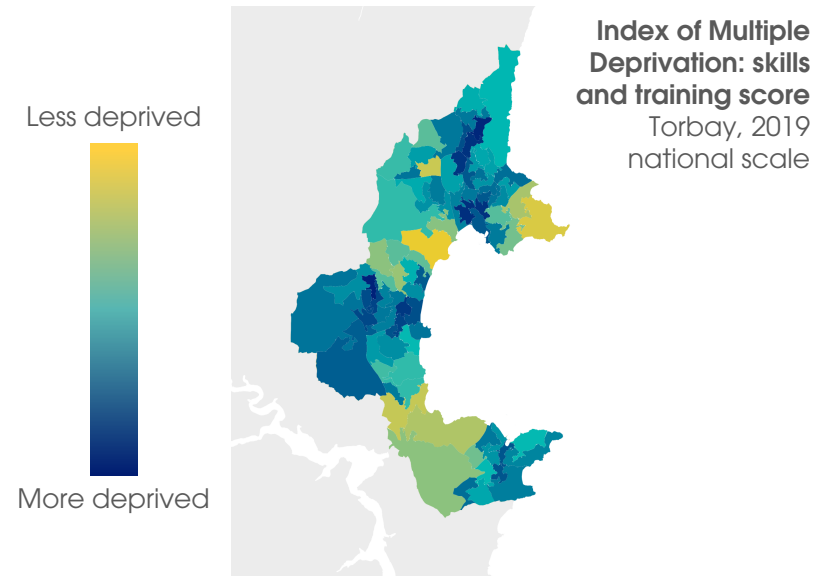
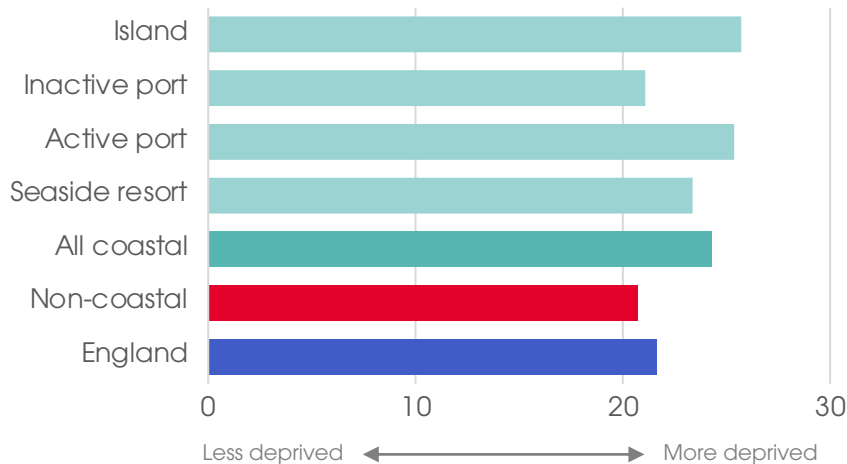
Coastal areas see higher levels of educational and vocational deprivation than non-coastal counterparts and England as a whole. Teacher recruitment and retention, transport links and poor housing stock are all external factors that feed into the quality of a student's education, training and wellbeing.

Geographical isolation compounded by limited choices surrounding employment affect students' levels of aspiration and attainment, and the White Paper's metrics could end up increasing the Levelling Up need, rather than bridging it. The Institute for Fiscal Studies found that the least deprived schools have received double the rate of increase in per pupil funding over the last five years than the most deprived schools through the National Funding Formula system.

Percentage of the working age population with no NVQ qualifications
England, local authority districts, 2021, per cent



Index of Multiple Deprivation: education score
England, local authority districts, 2019, average score for LSOAs

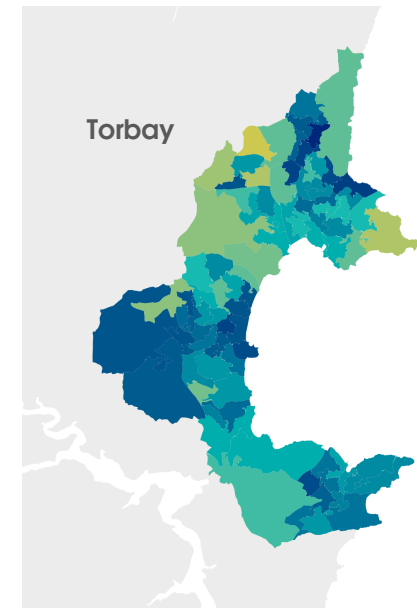
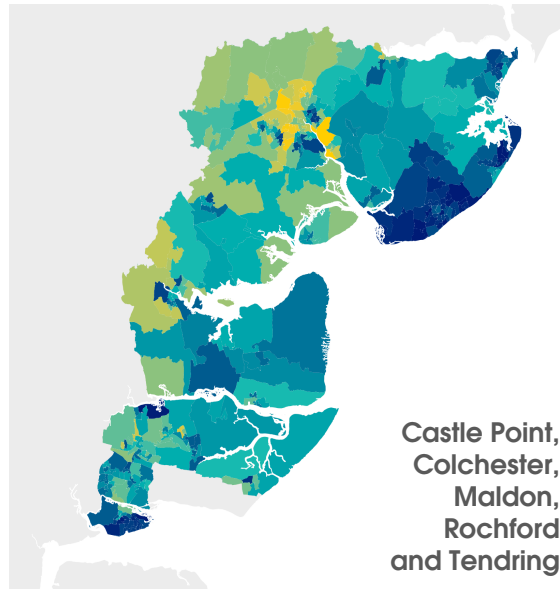
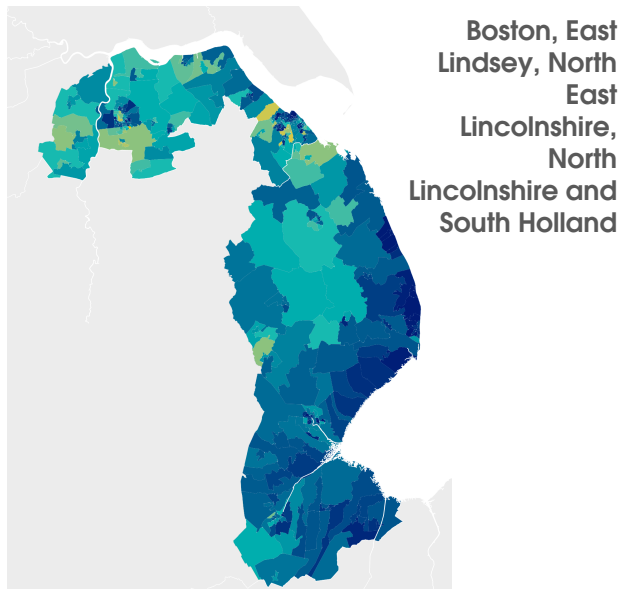
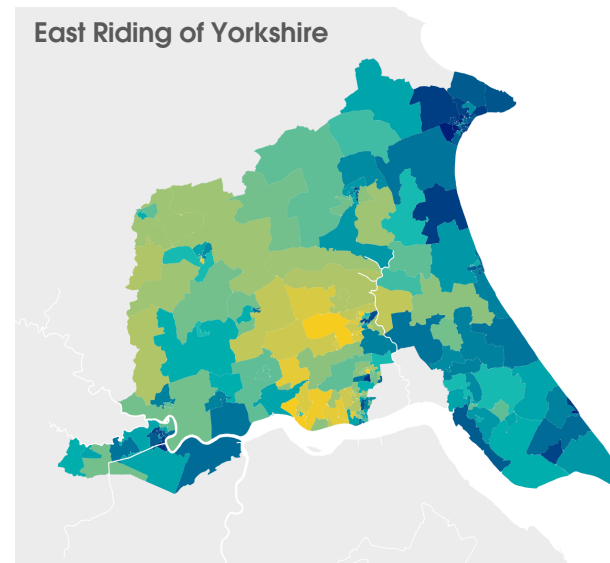
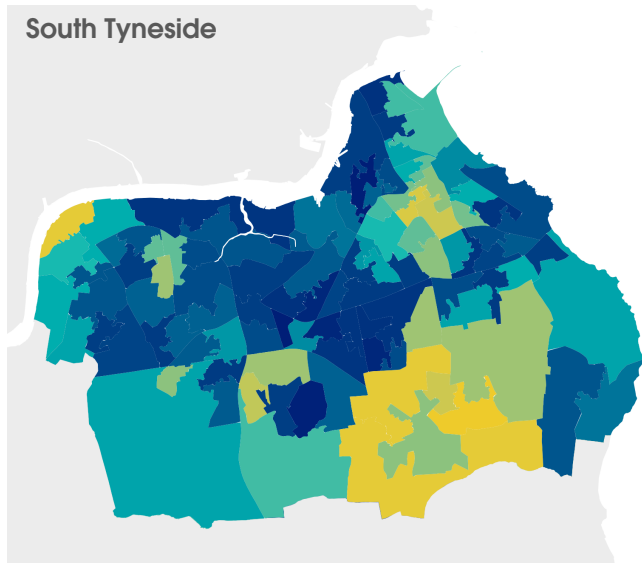


Proportion of the population with no NVQ qualification
LSOAs, 2011, per cent, national scale

Lower proportion

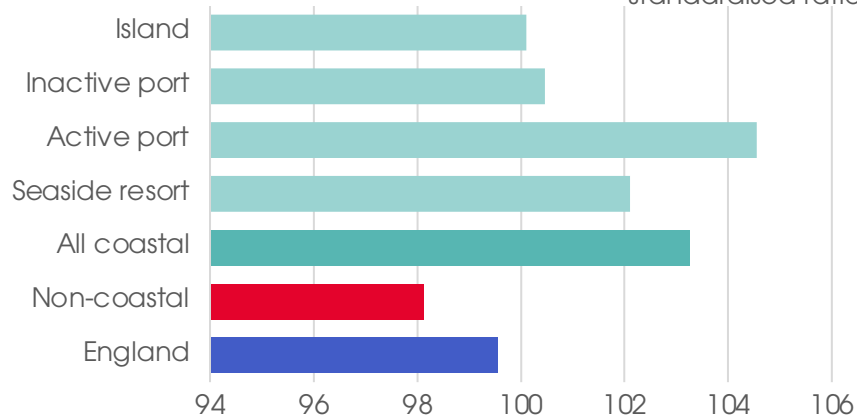


Higher proportion



Emergency hospital admissions for hip fractures in persons aged over 65

England, local authority districts, 2016 to 2020, age-standardised ratio



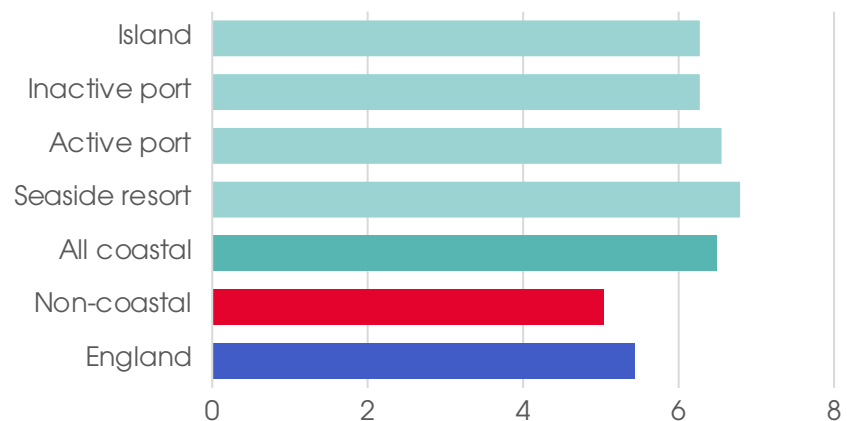
Coastal communities tend to have poorer health outcomes

The health conditions already selected for the Levelling Up framework, including cancer diagnosis, cardiovascular disease mortality and obesity are important metrics, but the overall aims would be strengthened by the addition of others. While smoking prevalence in adults is considered, there is no consideration for smoking in children. In local authorities with a seaside resort, almost seven per cent of children aged fifteen are smokers.

Other serious health conditions, like hospital admissions for chronic obstructive pulmonary disease, would be useful inclusions. Chief Medical Officer Professor Sir Chris Whitty's report, 'Health in Coastal Communities', details the extent to which residents on the coast have some of the worst health and wellbeing outcomes in England, and provides more valuable metrics.

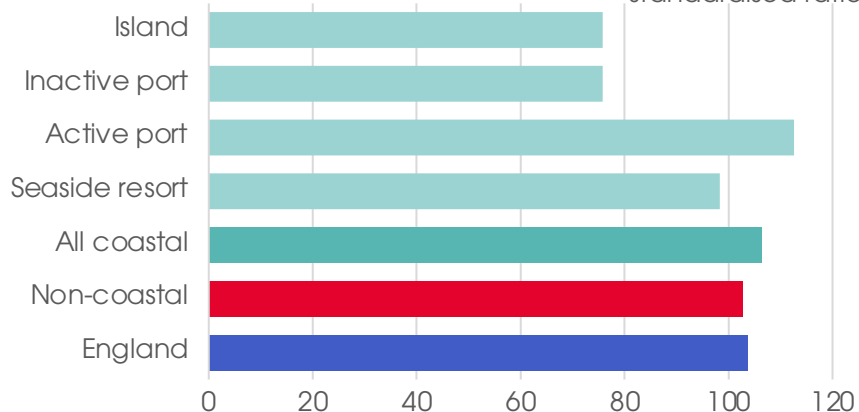
Smoking prevalence at age 15

England, local authority districts, 2014, per cent



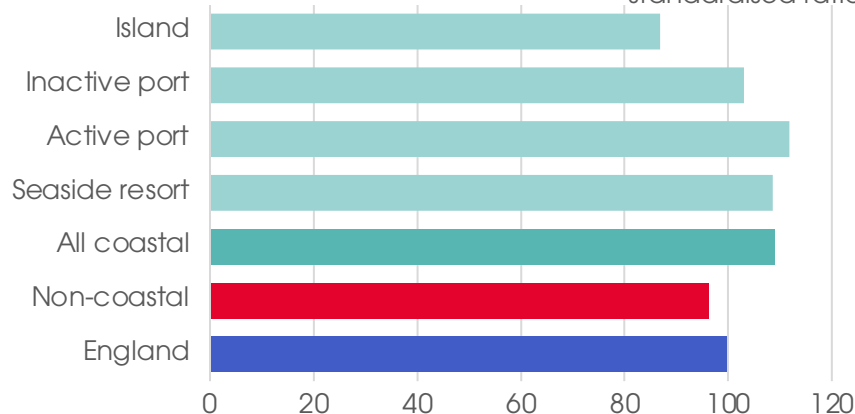
Emergency hospital admissions for Chronic Obstructive Pulmonary Disease

England, local authority districts, 2016 to 2021, age standardised ratio



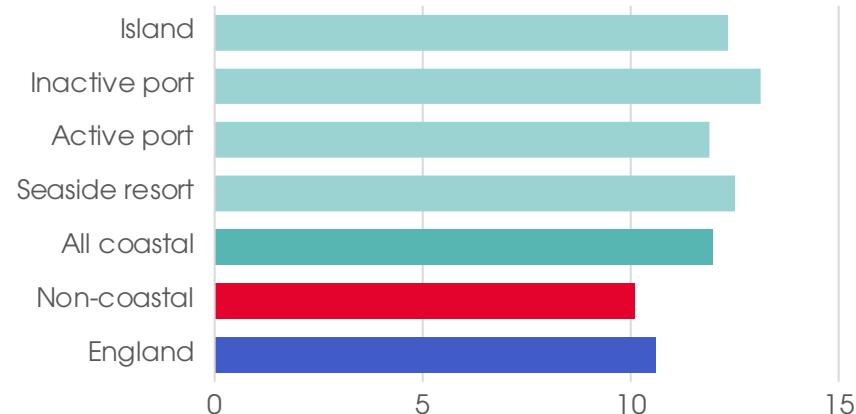
Hospital admissions for alcohol attributable conditions*

England, local authority districts, 2016 to 2021, age standardised ratio



Number of suicides per 100,000 of population

England, local authority districts, 2019 to 2021



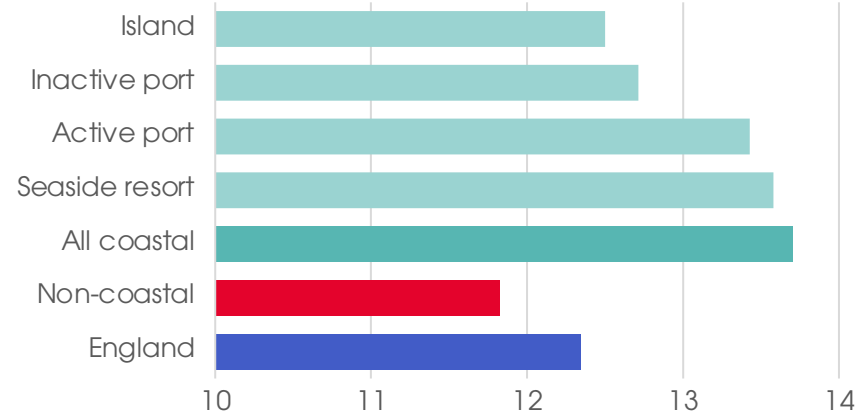
Levelling up metrics fail to consider mental health

Supporting those suffering from mental health problems and increasing the services available to them will be key to meeting the Levelling Up aim of improving wellbeing. Aside from a survey question on anxiety, none of the government's chosen metrics take into account data on mental health.

Incidences of suicide are higher in coastal communities, while coastal residents' are more likely to experience depression. Official data also shows more incidences of admissions to hospital due to alcohol than across the country as a whole. The inclusion of metrics examining mental as well as physical health would produce a more accurate account of health and wellbeing in local areas.

Recorded prevalence of depression in the population aged over eighteen

England, local authority districts, 2021, per cent

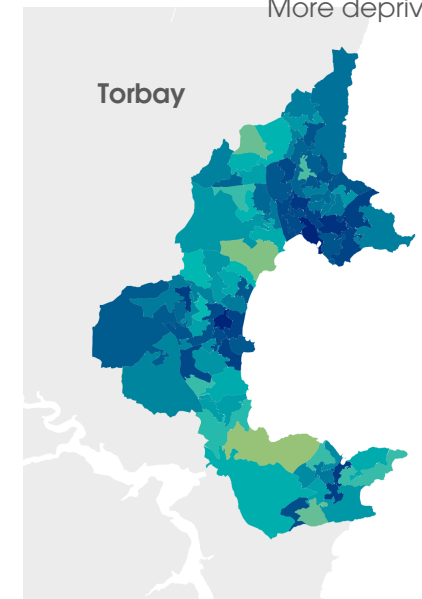
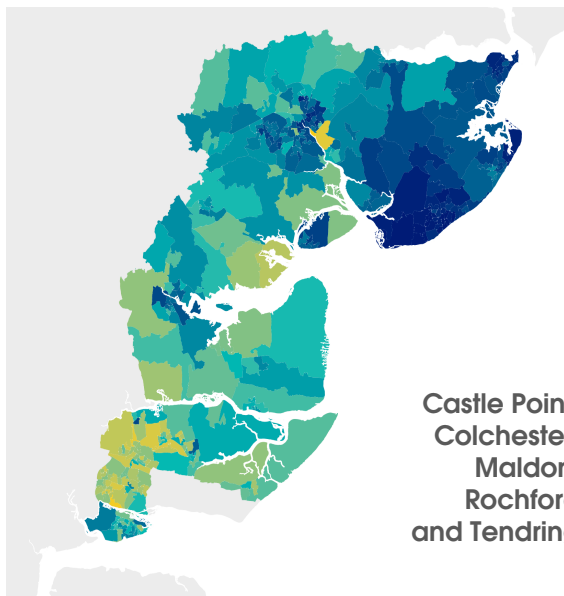
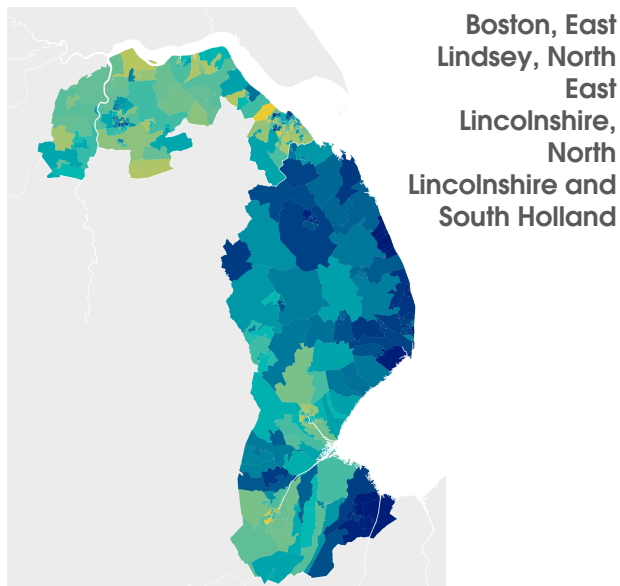
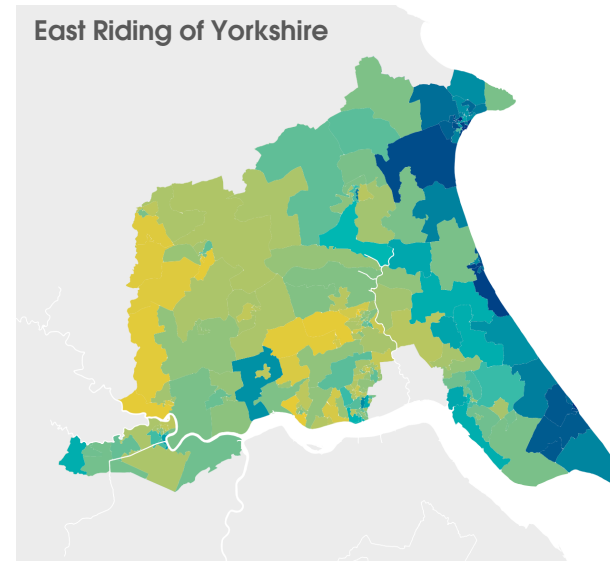
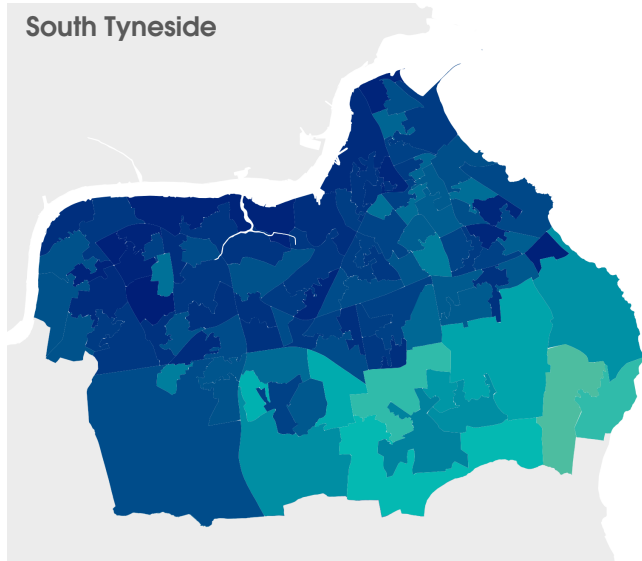


**Index of Multiple
Deprivation: mood and
anxiety indicator**
LSOAs, 2019, per cent,
national scale

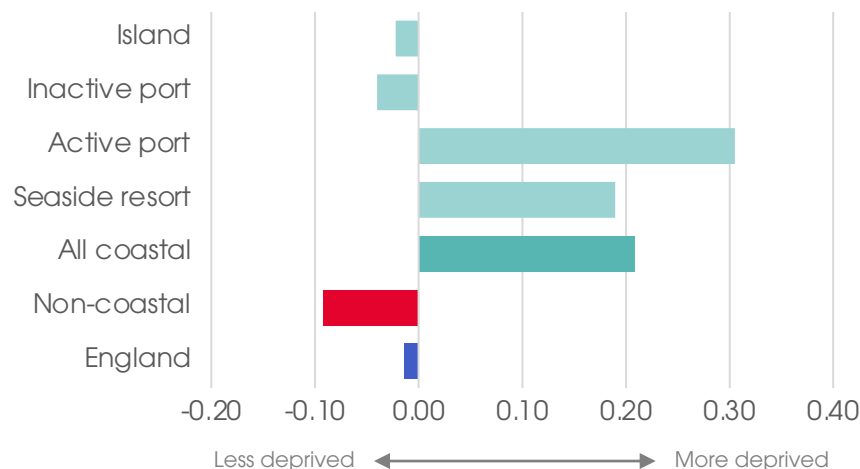
Less deprived



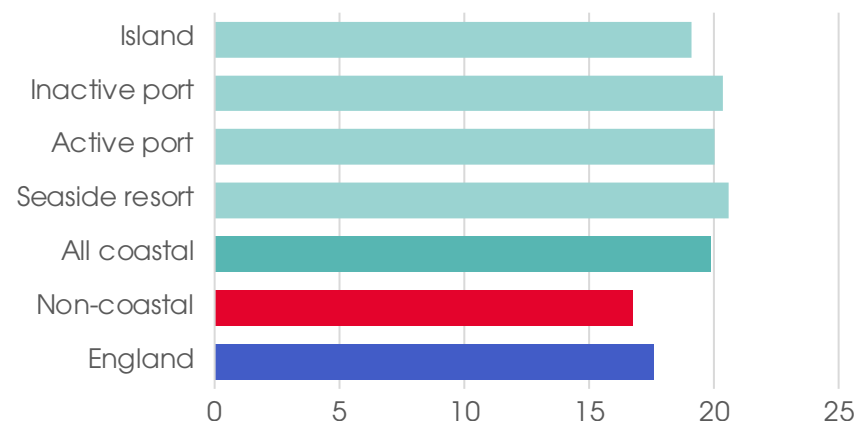
More deprived



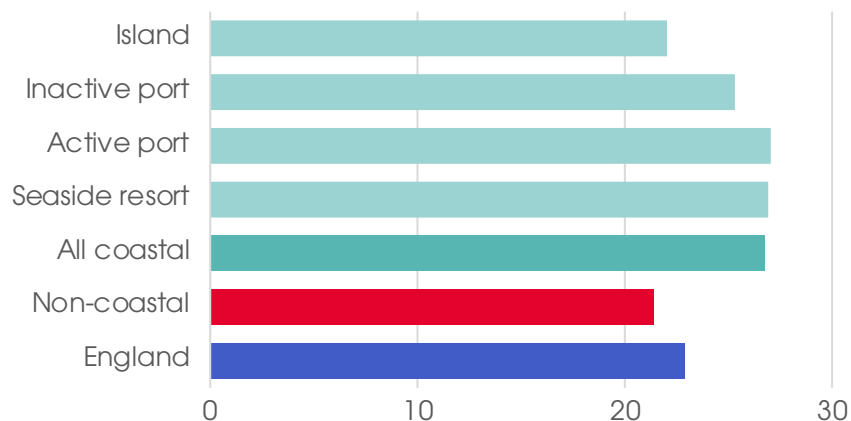
Index of Multiple Deprivation: health score
England, local authority districts, 2019, average score for LSOAs



Limiting long-term illness or disability
England, local authority districts, 2016 to 2020, percentage of respondents



Proportion of the economically inactive who are long-term sick
England, local authority districts, 2021, per cent



Long-term sickness has increased post-pandemic

Across the United Kingdom, there a half a million more people out of work because of a long-term health problem. Some of this number is due to 'long covid', but there has also been an increase in those out of labour force because of mental health conditions.

Long term sickness rates are highest amongst those who recently worked in retail, transport and hospitality – some of the biggest employers in coastal areas. The inclusion of long-term sickness or disability within the Levelling Up framework is important, as it would help to help track underlying health inequalities.

Limits with metrics chosen to support the Levelling Up objective of spreading opportunity and improving public

services	
Mission 5 : The number of primary school children achieving the expected standard in reading, writing and maths will have significantly increased	
Percentage of pupils meeting the expected standard in reading, writing and maths by end of primary school	Data only available for 56 local authority districts, and no official data available for East of England
Percentage of young people achieving GCSEs (and equivalent qualifications) in English and maths by age 19	Metric doesn't track other STEM subjects
Percentage of schools rated good or outstanding by Ofsted	Data only available for 125 local authority districts
Persistent absences for all pupils and disadvantaged and vulnerable cohorts of children	Data only available for 125 local authority districts
Percentage of 5-year olds achieving 'expected level' on literacy, communication and maths early learning goals	Data only available for 125 local authority districts
Mission 6 : The number of people successfully completing high quality skills training will have significantly increased in every area of the UK	
19+ Further Education and Skills Achievements (qualifications) excluding community learning, Multiply and bootcamps	Doesn't identify those learners who have relocated from another area to undertake FE or skills training which is unavailable to them at home
Number of starts, and achievements, on apprenticeships per 1,000	Doesn't account for type of apprenticeship, or whether apprenticeship leads to full-time work
Proportion of the population aged 16 – 64 with level 3+ qualifications	Workers with higher level qualifications are grouped in areas where the skilled jobs are
19+ further education and skills participation	Fails to capture participants that have move to an area to take undertake FE, many students in coastal authorities will have to leave their local area to attend college or university
Mission 7 : The gap in health life expectancy between local areas where it is highest and lowest will have narrowed, and by 2035 HLE will rise by five years	
Healthy Life Expectancy	Misses pockets of deprivation and deprivation
Smoking prevalence of adults	Doesn't consider prevalence in under eighteens
Obesity prevalence - children and adults	Doesn't consider levels of exercise or sport participation, access to sports clubs, gyms or swimming pool
Cancer diagnosis at stage 1 and 2	Doesn't account for treatment wait times, or time between referral and diagnosis
Under-75 mortality rate from cardiovascular diseases considered preventable (per 100,000 population)	Only considers cardiovascular diseases, not other preventable life-threatening diseases
Mission 8 : Well-being will have improved in every area of the UK with the gap between the top performing and other areas closing	
The average rating of those that feel satisfied about their lives.	As a survey, responses are subjective. Due to the small sample size, the Office for National Statistics advises that this data should not be used for local authority districts to be ranked against each other
The average rating of those that feel the things they do in life are worthwhile.	As a survey, responses are subjective. Due to the small sample size, the Office for National Statistics advises that this data should not be used for local authority districts to be ranked against each other
The average rating of those that felt happy yesterday.	As a survey, responses are subjective. Due to the small sample size, the Office for National Statistics advises that this data should not be used for local authority districts to be ranked against each other
The average rating of those that felt anxious yesterday.	As a survey, responses are subjective. Due to the small sample size, the Office for National Statistics advises that this data should not be used for local authority districts to be ranked against each other



Metrics for which data are available but are not considered in the missions

- Rates of diagnosed depression
- Rates of suicide
- Rates of diabetes
- Index of Multiple Deprivation – education and health scores
- Percentage of the population with no NVQ qualifications
- Percentage of the economically inactive who are long term sick
- Emergency hospital admission for hip fractures and COPD
- Smoking prevalence amongst children
- Rates of long-term limiting illness or disability
- Hospital admissions for alcohol attributable conditions



Metrics for which data are partial or only collected at a high geographical level, or data which are not currently collected but should be

- Average travel time to nearest further education provider by public transport (unavailable)
- Referral to treatment waiting times, mental and physical health (CCG area)
- Number of patients on hospital waiting lists per capita (CCG)
- Rates of delayed discharge from hospital (County level)
- Development of an alternative to Ofsted inspection rating
- Provision of mental health services
- NHS staffing rates per capita (NHS Trusts)
- Flu vaccination rates (regional)
- Ambulance quality indicators (regional)
- Cancer service waiting times, time of referral to diagnosis
- Two-hour urgent community response (CCG)

Suggested additional metrics to support the Levelling Up objective of spreading opportunity and improving public services in coastal areas

Restoring a sense of community, local pride and belonging

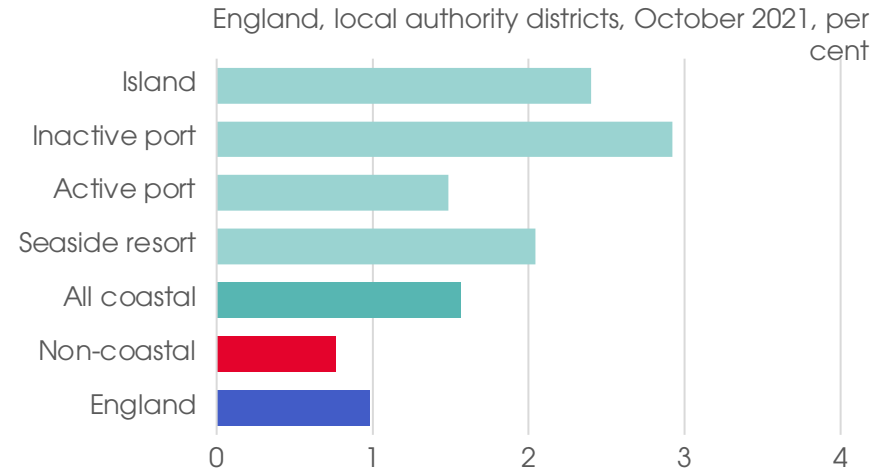
The upcoming section considers additional metrics which would help support the Levelling Up aim of restoring a sense of community, local pride and belonging.

Domestic tourism putting pressure on housing

The rise in staycations during the pandemic saw a boom in visitors to the coast, and while this was incredibly welcome for tourism businesses, it added additional strain to an already stretched housing market. Second homes and holiday lets can reduce the availability of properties and increase house prices in the most popular locations, impacting on the ability of buyers to secure their first home. With one of the Levelling Up aims being to increase home ownership, tracking the proportion of homes used for holiday accommodation would be beneficial.

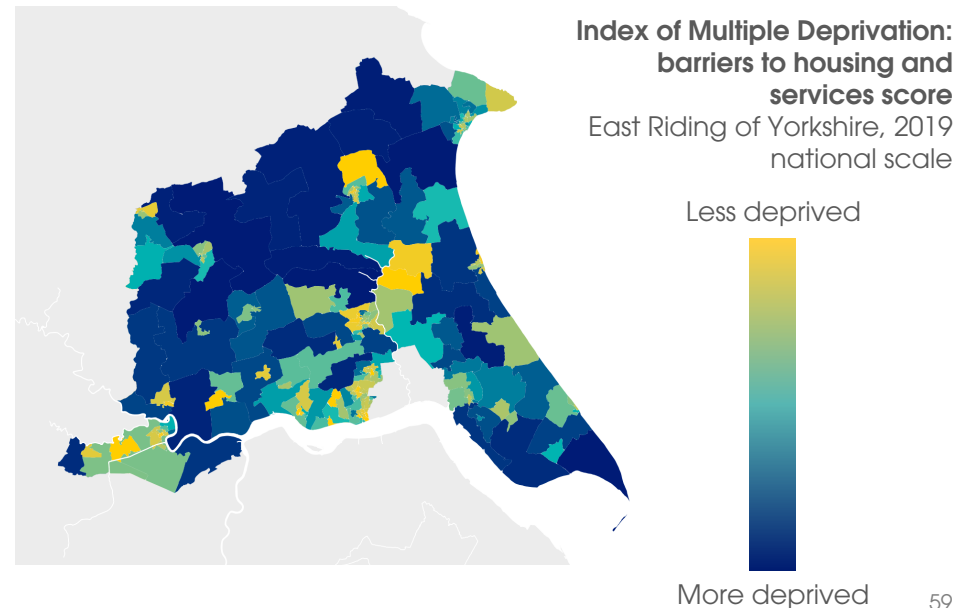
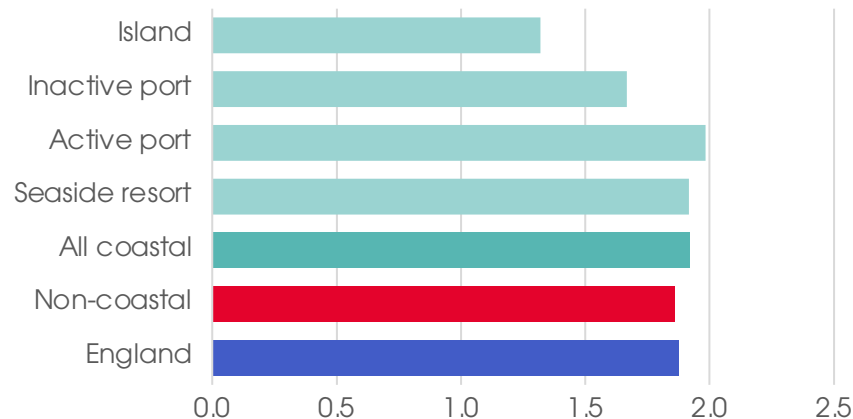
Empty homes are also contributing to the problem, and around 126,000 dwellings on the coast were deemed empty in 2021. With 278,000 households on local authority housing waitlists in coastal communities, reducing the number of empty homes could help secure rental properties for those in need.

Percentage of dwellings classified as second homes*



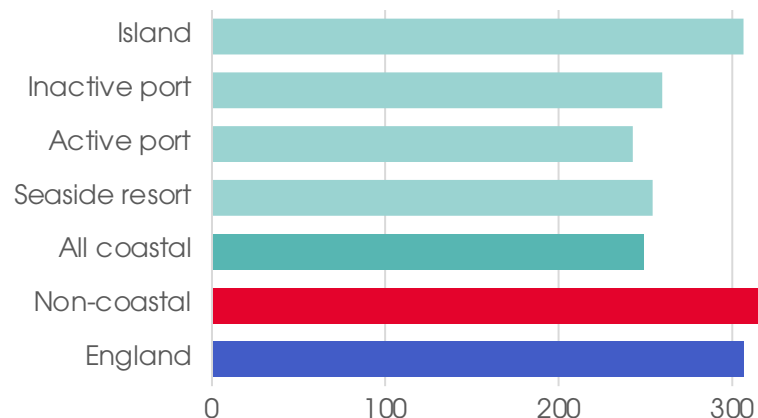
Percentage of dwellings classified as empty*

England, local authority districts, October 2021, per cent



Median house prices

England, local authority districts, year ending December 2021, £ thousand



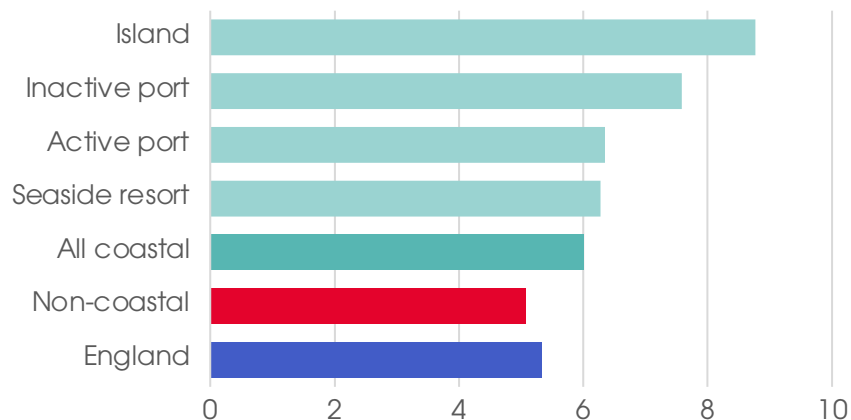
Average house prices don't tell the full story

For many renters, house prices and the potential cost of mortgage repayments are preventing them from taking their first step on the housing ladder. Although median prices in coastal communities are comparatively low overall, in the most popular coastal locations, house prices are above the England average.

The gap between prices inland and in the coast is narrowing, as post-pandemic, homeowners have been putting more emphasis on space and the environment in which they live. The move of households out from more urban centres, coupled with the rise in holiday home purchases, meant coastal homes increased more than non-coastal in the two years to December 2021.

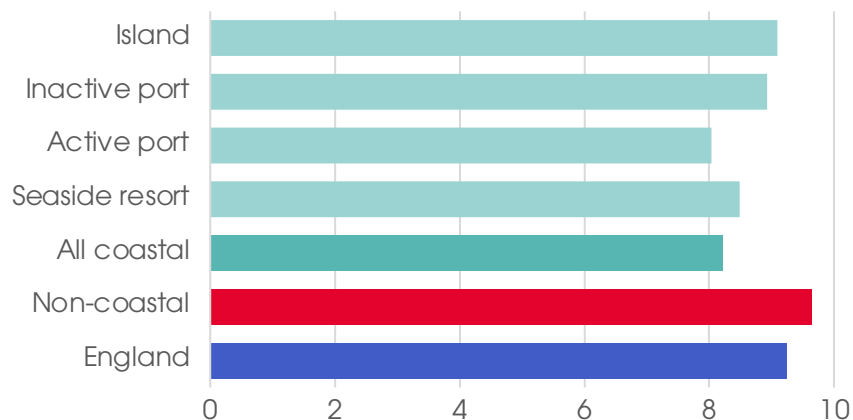
Growth in median house prices

England, local authority districts, December 2019 to December 2021, per cent



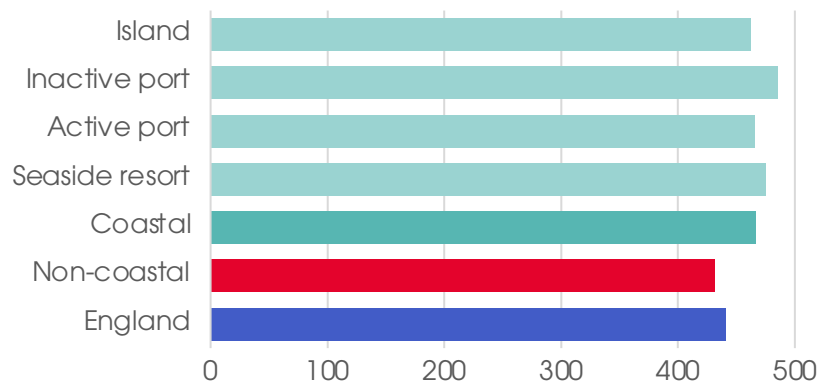
Median house price to median earnings ratio

England, local authority districts, 2021, residence based



More affordable ← → Less affordable

Total number of dwellings
England, local authority districts, 2021, dwellings per 1,000 people

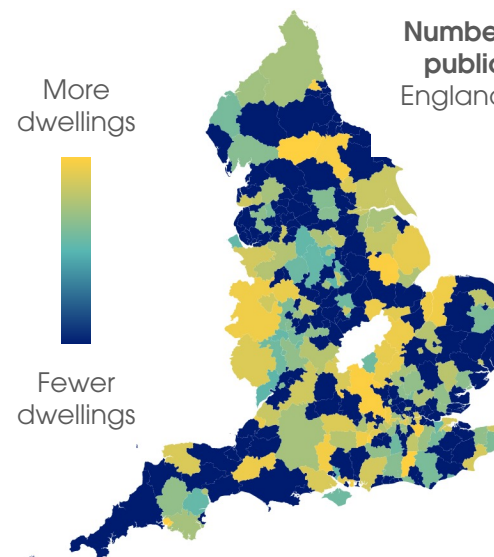


Coastal local authorities own proportionally fewer dwellings

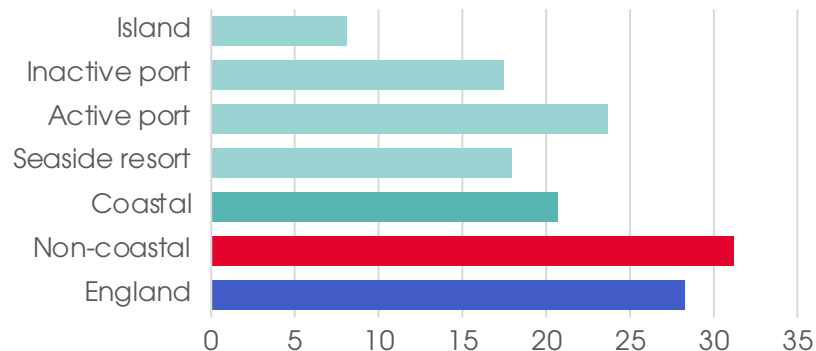
Data on dwellings by tenure reveal that although there are more dwellings per capita in coastal areas, there are substantially fewer dwellings owned by the local authority than non-coastal – one third fewer per 1,000 residents.

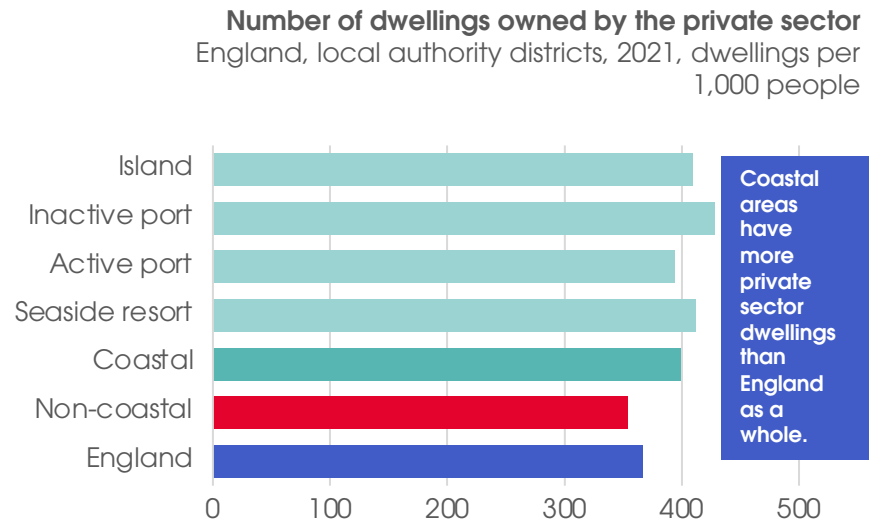
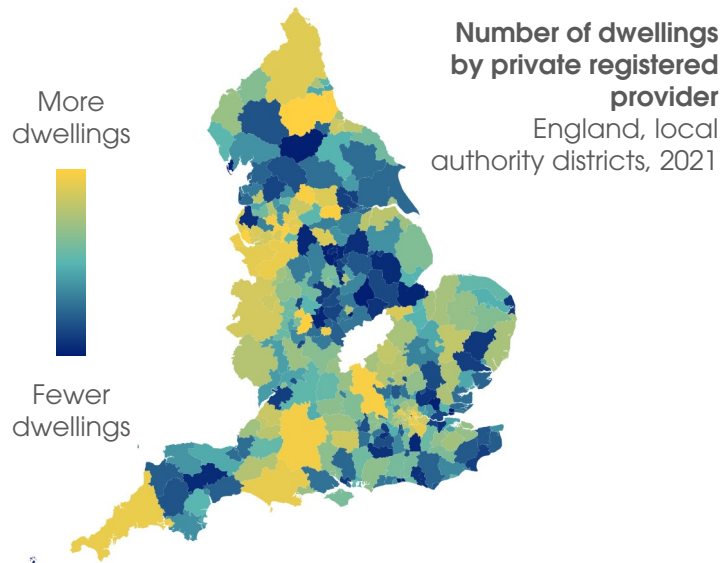
Tenure of dwellings should be considered in the Levelling Up metrics because private rents tend to be more expensive than local authority social or affordable rents, further increasing the cost of living. Along England’s coastline, there are fewer public sector provider dwellings, meaning potentially higher living costs for coastal residents.

Number of dwellings by public sector provider
England, local authority districts, 2021



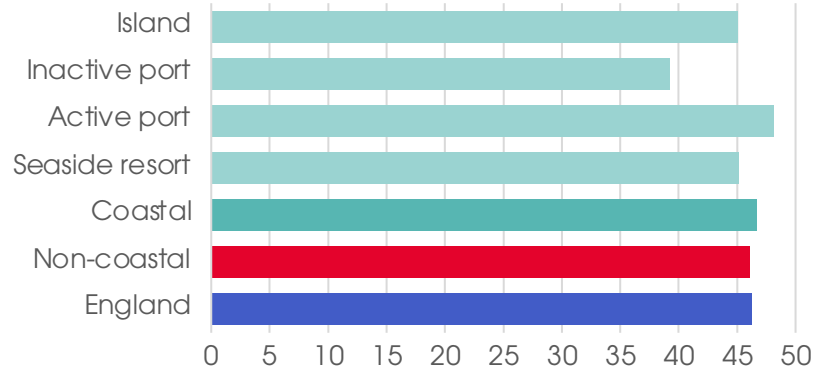
Number of dwellings owned by the local authority district (including ones owned by other local authorities)
England, local authority districts, 2021, dwellings per 1,000 people



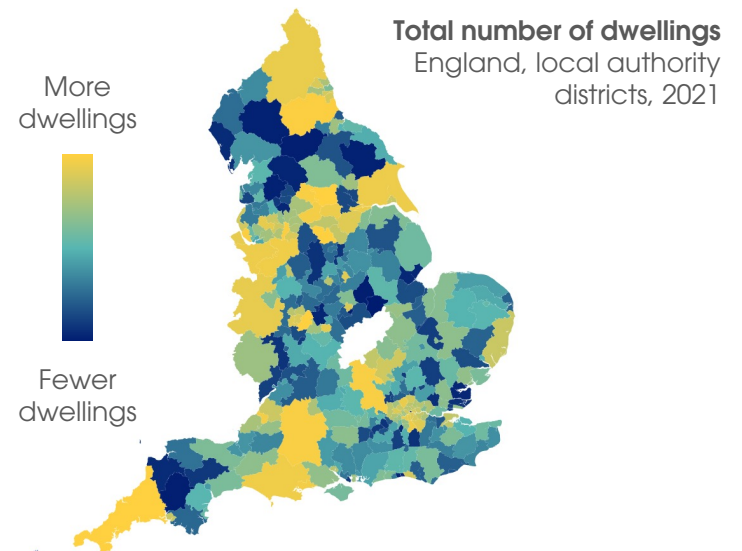


Number of dwellings owned by private registered providers

England, local authority districts, 2021, dwellings per 1,000 people

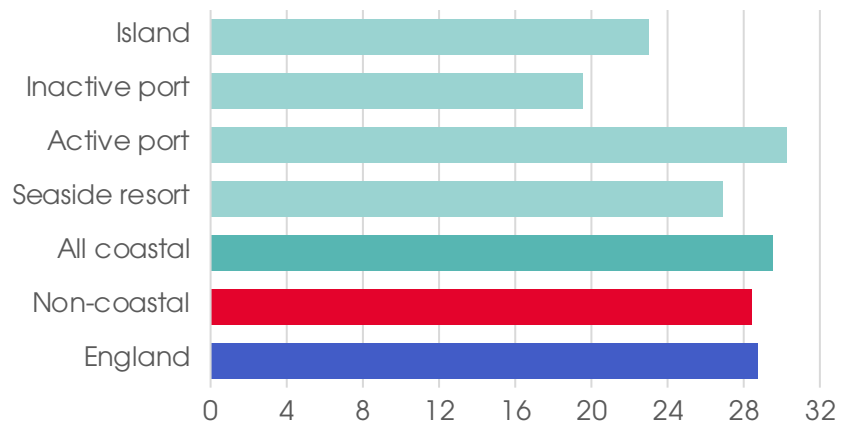


Coastal and non-coastal areas have a similar number of private registered provider dwellings to England as a whole.



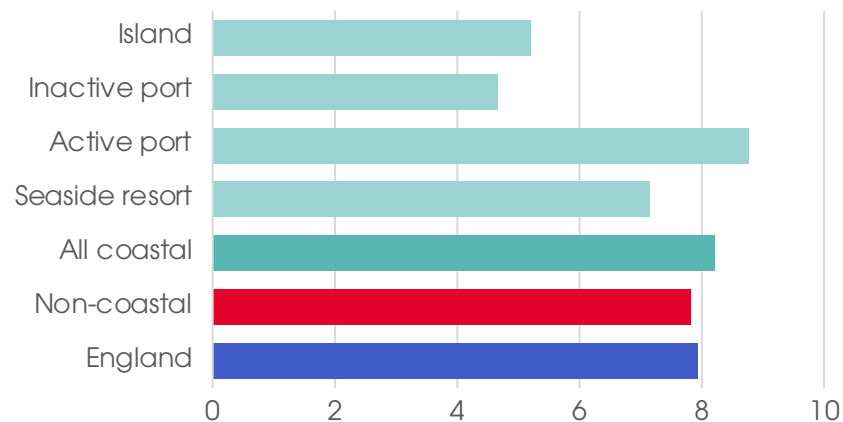
Reported incidences of violence against the person

England, local authority districts, June 2020 to June 2021, incidences per 1,000 people



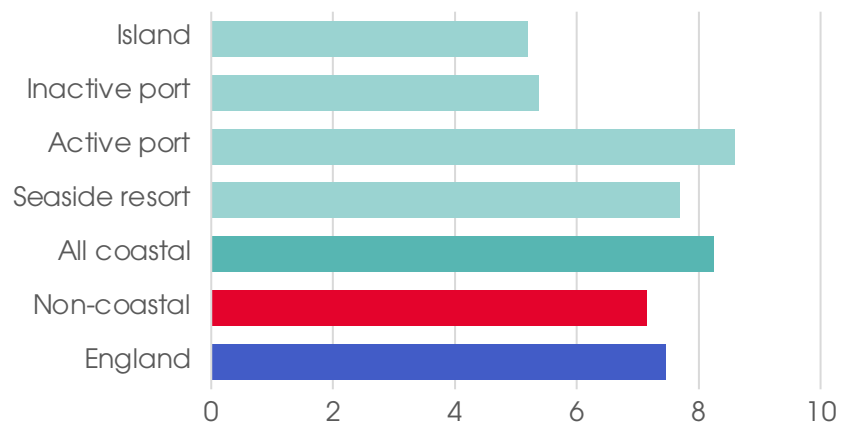
Reported incidences of public order offences

England, local authority districts, June 2020 to June 2021, incidences per 1,000 people



Reported incidences of criminal damage and arson

England, local authority districts, June 2020 to June 2021, incidences per 1,000 people



Data on crime is either unavailable or underutilised

The Levelling Up aims would benefit from including more crime-related data within the 'restoring a sense of community, local pride and belonging' objective of the White Paper. Some of the metrics chosen by government do not have data available at a sufficiently low level, while others are yet to be determined or published.

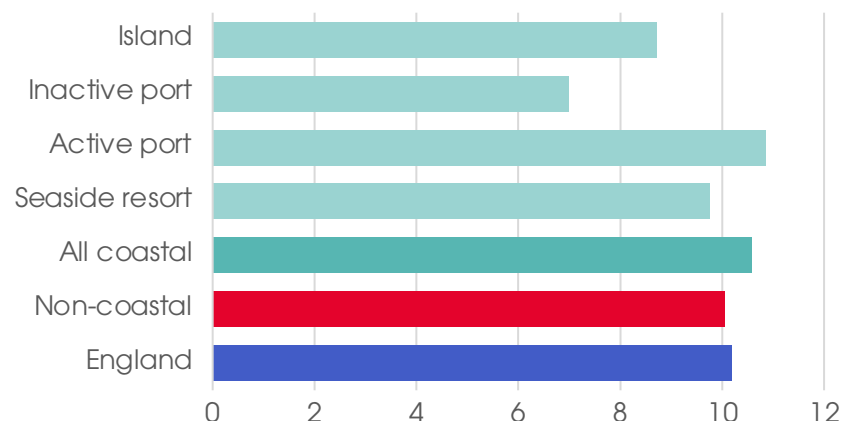
The focus of criminal activity tends to be on cities, but data from the Home Office indicates that there are higher rates of certain types of crime in coastal areas than the national average. Reported incidences of violence against the person, public order offences and criminal damage and arson, for example, are all higher in coastal areas than non-coastal areas.

Current framework doesn't address violence against women

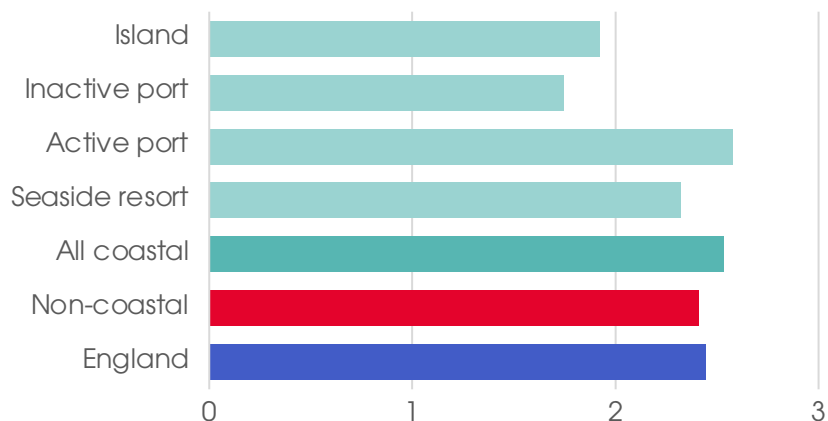
The Levelling Up framework would be strengthened by the inclusion of metrics which specifically track crimes against women and girls. While these sexual offences affect all genders and ages, and impact on all communities, women are at higher risk of becoming victims of rape and sexual assault. One in four women will be the victim of sexual assault, compared to one in twenty men.

Victims of these crimes report non-physical effects such as mental health problems, impacting two thirds of female victims and almost half of male victims.

Reported incidences of stalking and harassment
England, local authority districts, June 2020 to June 2021, per 1,000 people



Reported incidences of sexual offences
England, local authority districts, June 2020 to June 2021, per 1,000 people



More incidences of stalking and harassment and sexual offences on the coast

Reported incidences of stalking and harassment and sexual offences in coastal areas are slightly higher than in non-coastal areas and in England as a whole, with active port districts seeing the highest rates.

But there are limits to the data, as most sexual offences go unreported, with five in six women and four in five men not reporting incidents.

Limits with metrics chosen to support the Levelling Up objective of restoring a sense of community, local pride and belonging.

Mission 9 : Pride in place, such as people’s satisfaction with their town centre and engagement in local culture and community, will have risen in every area of the UK, with gap to top performing closing		Mission 11 : Homicide, serious violence and neighbourhood crime will have fallen, focused on the worst-affected areas	
Percentage of adults who are satisfied with their local area as a place to live	Reponses are subjective, focus on regions misses inequalities within region.	Neighbourhood crime	Data currently unavailable
Percentage of individuals who have engaged in civic participation in the last 12 months	Focus on regions fails to capture inequalities within regions. Metric doesn’t capture areas with higher rates of retired or part-time workers with greater opportunity to volunteer their time. Doesn’t measure ability for people to be able to participate or barriers to participation	Homicide	Data is available at Police Force Area level and is not being utilised. Focus on regions fails to capture inequalities within regions
Mission 10 : renters will have a secure path to ownership with the number of first time buyers increasing in all areas; and number of non-decent rented homes to have fallen by 50%		Hospital Admissions for Assault with a Sharp Object amongst under-25s	Data is available at Police Force Area level and is not being utilised. Focus on London and rest of England fails to capture inequalities across the rest of England
Proportion of non-decent rented homes	Focus at regional level fails to address inequalities within regions.		
Number of first time buyers	Data currently unavailable		
Recent first time buyers (last 3 years)	Data currently unavailable		
Net additions to the housing stock	Net of all housing tenures, doesn’t differentiate between private, social, affordable etc.		



Metrics for which data are available but are not considered in the missions

- Percentage of dwellings that are second homes
- Percentage of dwellings that are empty homes
- Average rent in relation to wages
- Index of Multiple Deprivation – barriers to housing and services
- Median house prices and growth in median house prices
- Tenure of dwellings



Metrics for which data are partial or only collected at a high geographical level, or data which are not currently collected but should be

- Rates of properties being used for Airbnb (unavailable)
- Town/ village/ city centre footfall (unavailable)
- Net additions to the housing stock which are social and affordable rent (unavailable)

Suggested additional metrics to support the Levelling Up objective of restoring a sense of community, local pride and belonging in coastal areas

The funding landscape

This section outlines the current level of funding available to local authorities, as well as the allocation of flagship funding to coastal communities.

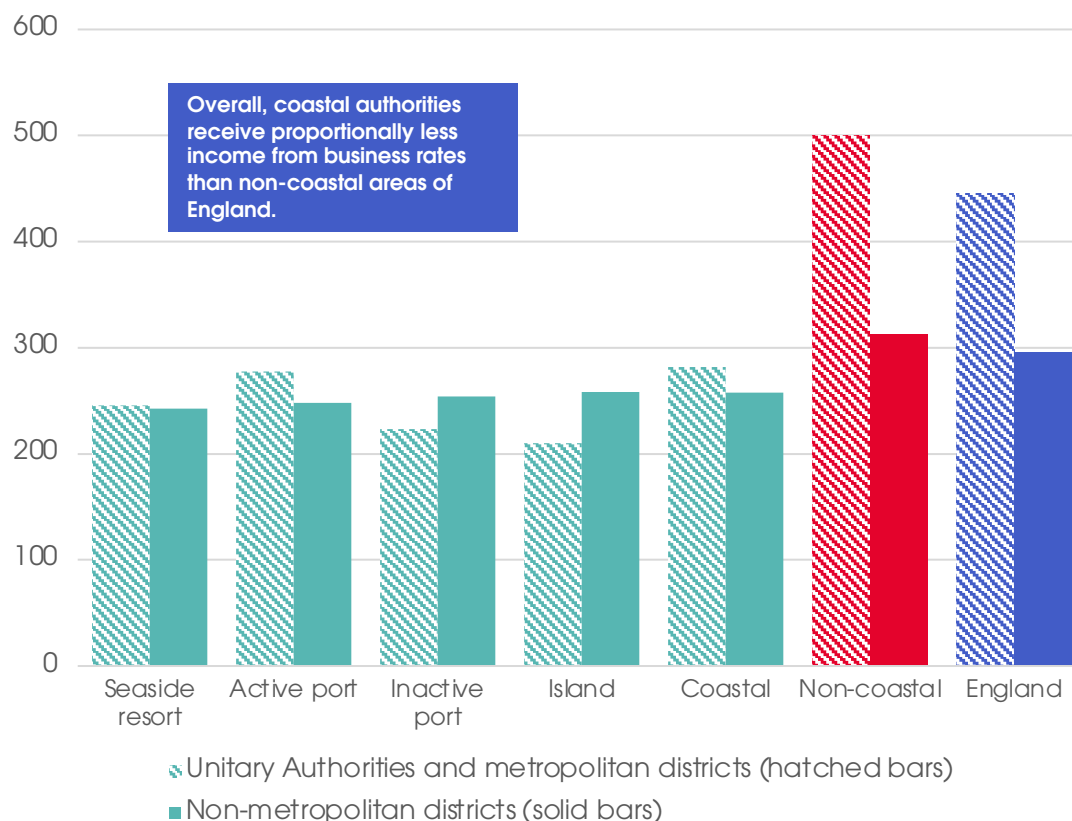
Funding has to go further in coastal areas

The cost of delivering services in peripheral and more sparsely populated areas is higher, putting additional financial pressure on coastal authorities.

The same economies of scale are not possible in Cornwall, for example, as they would be in Manchester, so extra money is required to deliver the same output. For those coastal areas that are attractive tourist destinations, local authority funding doesn't only have to meet the needs of local residents but visitors during the peak holiday months, too. Less funding available also means there is less available to spend on managing tourism, supporting economic development, inward investment and skills growth.

A related issue for some coastal authorities comes from residents living permanently in holiday villages. Despite not technically legal, councils report older people staying long-term in static caravans and using local services, while not being required to pay council tax due to the nature of the accommodation. Comparatively more older people in a district requires higher expenditure on services to support their health and wellbeing and means a reduction in spending on other services.

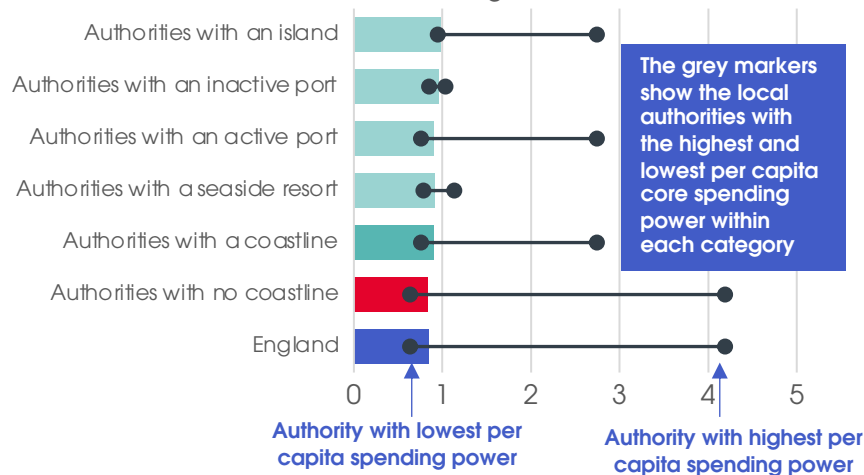
Net income from business rates*
England, local authorities, 2021/22, £ per resident



*net amount receivable from rate payers after taking account of transitional adjustments, empty property rate, mandatory and discretionary reliefs and accounting adjustments; Source: Pragmatix Advisory analysis of Department for Levelling Up, Housing and Communities data

Per capita core spending power of unitary authorities and metropolitan districts

England, 2022/23, £ thousand



The spending power of local authorities varies across the country

Within our categories of local authorities, there is little difference in the average per capita spending power of councils. What the data does show however, is that the levels of core funding available can vary greatly between authorities.

Amongst unitary authorities and metropolitan districts with an active port, for example, spending power can be anything from £750 to £2,700 per capita. For authorities without any coast, spending power ranges from £650 to £4,200 per capita.

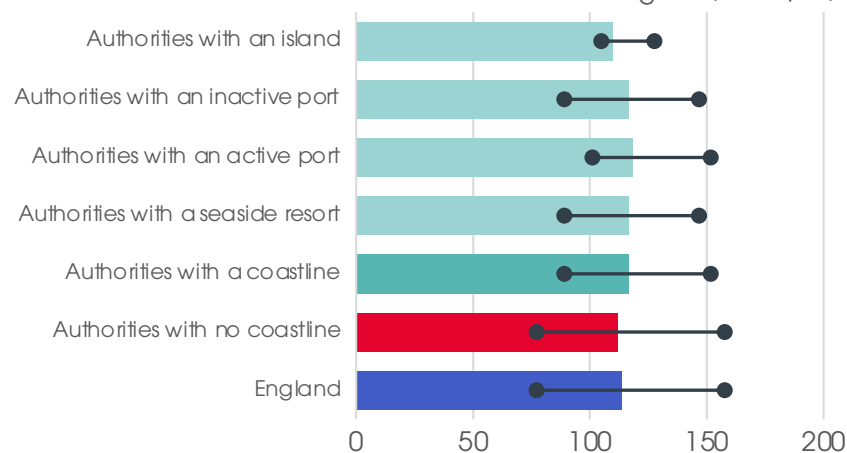
No way to identify where money is spent within authorities

Whilst the core funding in coastal areas is on par with non-coastal areas, more core funding is needed to meet the deprivation challenges within coastal communities.

Local authority core spending power data is only available for an entire district, not at ward level. This means it isn't possible to identify where within the council area money is spent. The per capita spending power of a coastal district, for example, is therefore not a metric for each resident on the coast, but rather a per person average for all residents across the authority. Metrics at a more granular ward level would allow further examination of the spending power, providing a more accurate picture. Authorities with a coast may either completely coastal or with a small stretch of coastline, thereby skewing the data.

Per capita core spending power of non-metropolitan districts

England, 2022/23, £



Boost to coastal from flagship funds

The recognition of the need for extra investment on the coast is evident in the allocation of recent funding initiatives.

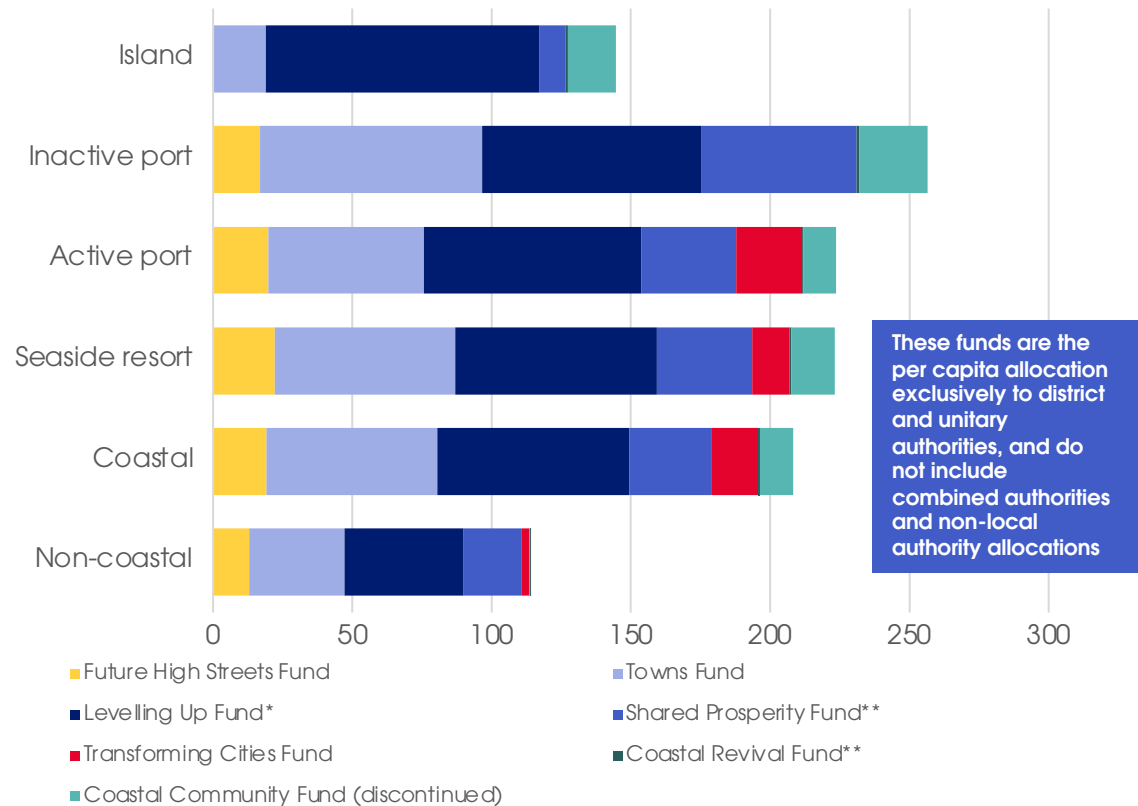
Coastal local authority districts have received 50 per cent more money per head of population from government’s major discretionary funds in recent years. Part of the difference in per-head funding is due to the identified need, but also likely in part because of the higher costs of delivery.

There has not been a uniform boost for all coastal communities from new funds, however, with some areas receiving proportionally more funding than others

Central government has also recognised the vital contribution that coastal areas make to the economy, history and culture of the United Kingdom through the creation of funds exclusively for coastal communities. They aim to help coastal communities thrive, and to make them more attractive places to live, work and visit.

But the allocations of flagship funding are based on need at a certain point in time. The Levelling Up funds, for example, are only committed for as long as the current parliamentary period. There is therefore a need for long term funding streams.

Per capita allocation of selected funds distributed exclusively to districts
England, local authority districts, 2023, £

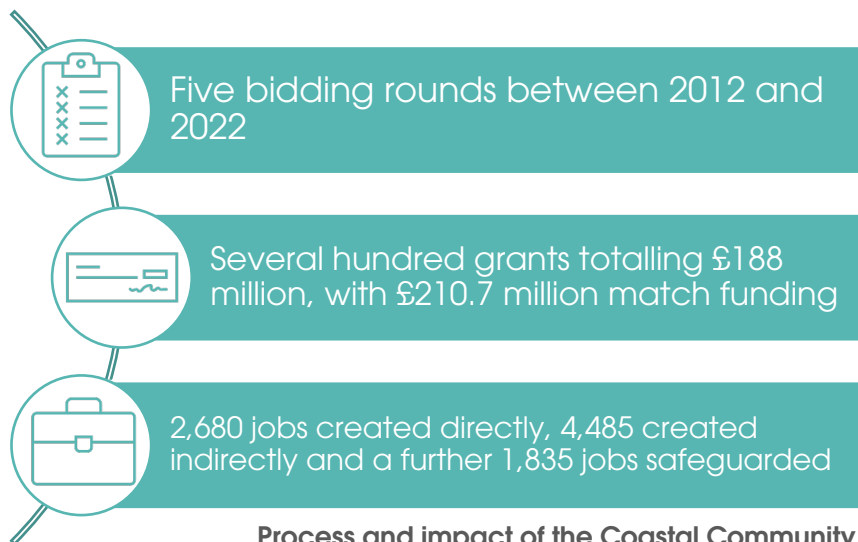
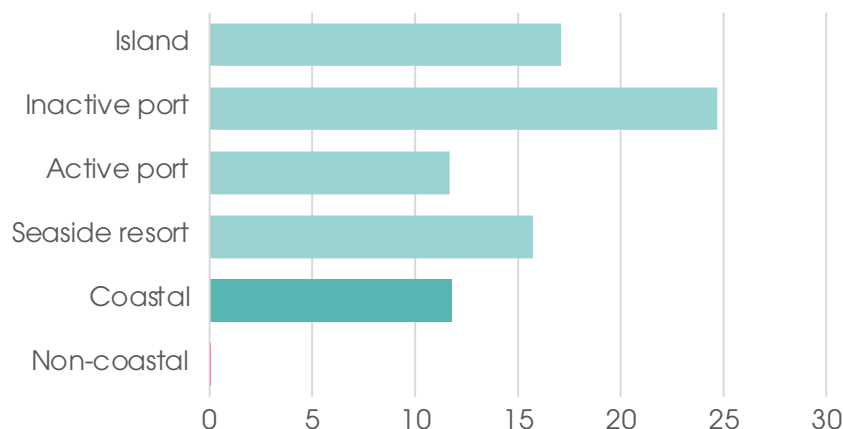


Funds used to restore coastal heritage

The Coastal Revival Fund is now closed for new applications, but since 2015, it has supported 184 projects to 'kick-start' regeneration of at risk coastal heritage with £7.5 million of funding.

Although a relatively small per capita funding with a maximum award of £50,000, the investment has been used to restore outdoor bathing pools, repair theatres, and create pop-up shops.

Per capita allocation of Coastal Community Fund
England, local authority districts, 2022, £ per resident



Process and impact of the Coastal Community Fund

Evaluation of CCF shows importance of funding

The Coastal Community Fund has now been integrated into the Shared Prosperity Fund, but over the past ten years and five rounds of funding, it invested around £182 million in 178 projects across England. When open for applications, the fund was oversubscribed ten-fold on some rounds, highlighting the scale of need for support.

A review into the Coastal Communities Fund found that prior to the establishment of the fund, despite suffering similar economic shocks as former industrial cities, coastal areas have not previously seen the level of focus on regeneration experienced by those cities. For this reason, the review concluded that the fundamental rationale for the programme was sound, and the grants allocated contributed to job growth and prosperity in coastal communities.

Long-term strategic funding plan required

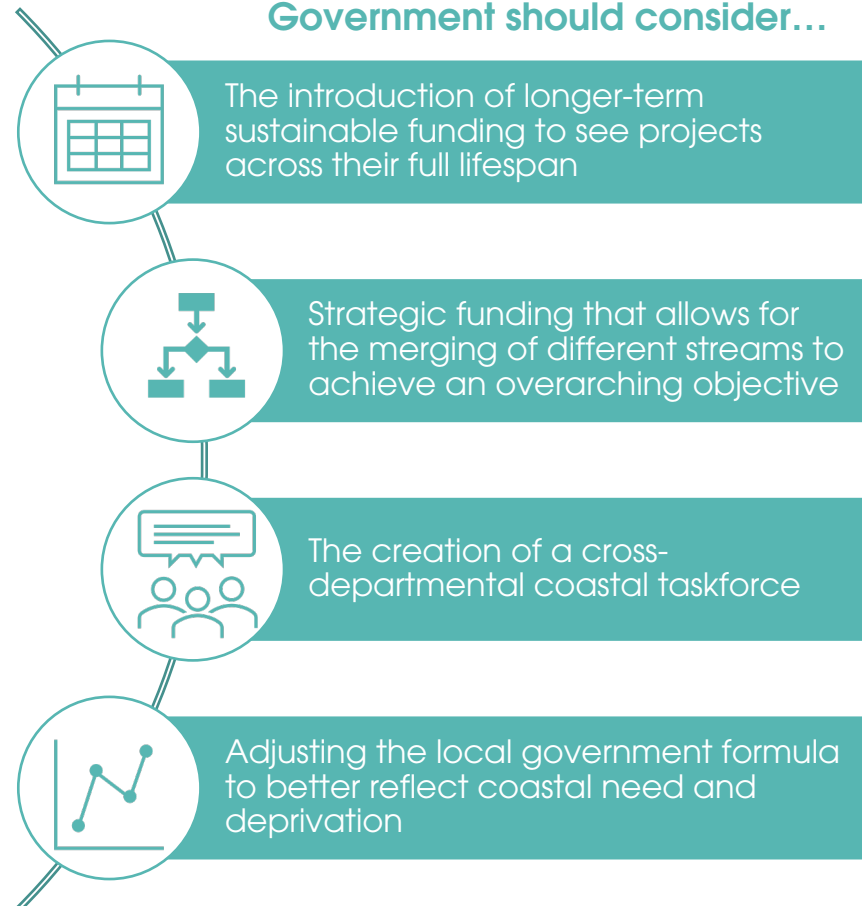
Many of the challenges facing coastal communities have developed over years, if not decades, and addressing these issues requires longer-term funding strategies.

As part of this research, we undertook a series of interviews with coastal stakeholders to find out how funding programmes could be improved upon to better suit the needs of communities on the coast. One of the key challenges identified was the short-term nature of many funding streams. Those which require money to be spent within one to three years, or which require set outcomes within a similar time frame reduce the scope of projects in which local authorities and their partners can invest.

A further concern from stakeholders was that too often, applications for funding are adjusted to match the criteria of the fund, rather than the fund meeting the existing need. There were also concerns that the requirement for match funding disadvantaged areas in which private investment was not readily available.

Allowing a longer-term, strategic plan to join up funding streams towards an overarching aim, or allowing authorities to spend the funding in a way which they believe would benefit their communities, would be more conducive to Levelling Up coastal areas. One way to achieve this could be to adjust the local government funding formula to better reflect need and deprivation, providing councils with some of the additional funds required to help tackle local challenges.

Government should consider...



An aerial photograph of a rugged coastline. The water is a deep, dark blue-green. Several kayakers are visible on the water, some near the shore and others further out. The shoreline is composed of large, layered rock formations, some covered in green moss or lichen. The overall scene is dramatic and scenic.

Part 3: The future for coastal communities

In this section we identify and explore the challenges and opportunities facing coastal communities.

With support coastal can contribute more

Coastal areas have their challenges, but with the right support they have the potential to contribute even more to the United Kingdom economy.

The people, natural capital and heritage of England's coastal communities already contribute much to the country. As we have identified earlier in this report, there are undoubtedly areas of deprivation and need, but there are also significant opportunities.

Through evaluation of official data and an interview programme with key coastal stakeholders, we have identified a series of areas which will play a major role in the lives of coastal residents and businesses in the future, as well as being of importance to the United Kingdom economy as a whole.

For each of the themes, we explore in more detail the main challenges and opportunities coastal communities face. The ongoing climate crisis is a thread throughout and, while there is natural overlap between themes, we have grouped the factors into the following sections: (i) the green economy, (ii) marine environment and infrastructure, (iii) education and careers and (iv) visitor economy.

The first two parts consider the green and 'blue' economies, looking at, among other factors, renewable energy generation and marine development, respectively. The third and fourth parts, education and careers and tourism, focus more on people and the ways in which coastal communities can optimise the coastal offer.

The green economy

- Coastal flooding and erosion risk management
- Increasing storms and hightides
- Historic coastal landfill sites
- Renewable energy generation
- Electric vehicle charging points
- Changing behaviours and ongoing climate change crisis

Marine environment and infrastructure

- Marine development
- Fisheries
- Competition for marine space
- Ports
- Coastal, inshore and offshore marine habitats

Education and careers

- Training, education and upskilling the workforce
- Digital connectivity
- Home and hybrid working

Visitor economy

- Domestic and international tourism
- Seasonality
- Job vacancies and upskilling the workforce
- Ecotourism

The green economy

Climate change is a critical coastal challenge

Strength

- Renewable energy generation

Weakness

- Green finance funding
- Electric vehicle charging points

Opportunity

- Low carbon jobs
- Sustainable coastal defences
- Restoration and enhancement
- Carbon capture

Threat

- Coastal flooding and erosion
- Rising sea levels
- Historic coastal landfill sites
- Loss of coastal and inshore marine habitats
- Lack of environmental data and evidence

Coastal communities are ground zero for the drastic effects of climate change, bearing the brunt of impacts including coastal inundation and groundwater flooding.

In coastal communities, you are more likely to be the victim of a flood than the victim of a burglary. While government spending on coastal flooding and risk management has seen an increase in real terms, it tends to focus on households at risk, rather than businesses. As for the impact of coastal erosion, there is currently no funding available for transitioning and adapting communities, with only a short-term funding pot provided to specific projects. There is no insurance scheme for homes and businesses lost to the sea and with a higher proportion of small to medium enterprises operating in coastal areas, 40 per cent of businesses do not reopen after suffering significant flood damage.

Groundwater flooding also affects coastal infrastructure and key public sector services. With the broader challenge of climate change, days of intense rainfall are set to increase in proportion to a rise in global temperatures, demonstrating the need for action sooner rather than later. While coastal defences have previously taken the form of concrete seawalls and bulkheads, future measures could lie in greening the grey, alongside a move to nature-based defences such as saltmarshes and sand dunes. In addition to sustainable coastal defences, there are also opportunities in accelerating landward green infrastructure to reduce surface water flooding and in promoting flood management services, as only 41 per cent of people eligible for free flood warnings are registered to receive them.

Interviews with coastal stakeholders and desk research have identified the role coastal communities play in renewable energy generation, producing 1.1 megawatt hours per person of total renewable electricity. Global pressures on supply chains are accelerating the transition to green energy. With specific and tailored support and funding to grow the green economy, coastal communities are well-placed to be established as green value hubs with the potential to upskill local residents.

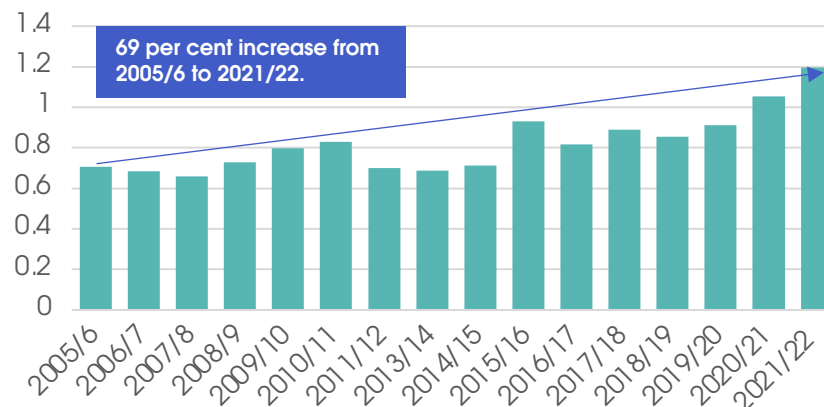
Impacts of climate change necessitate higher spending

The shape of England's 5,881 miles of coast is changing rapidly, hastened by climate change and rising sea levels. This is an issue affecting inland communities too, with a quarter of floods occurring beyond areas identified as being susceptible to flooding.

Coastal inundation is a major challenge for coastal communities and infrastructure, with flash floods up to six metres high. Central government's budget allocation for flood and coastal erosion risk management has increased in real terms over the last decade as the effects of climate change have worsened.

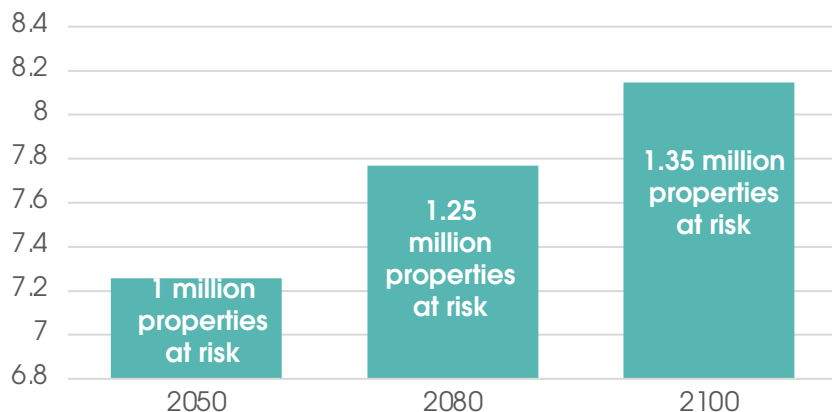
Real expenditure on flood and coastal erosion risk management

England, 2020/21 prices, £ billion



Forecasts of coastal inundation caused by future sea-level rise

National level, thousand km²



Sea level rises putting more homes at risk

Infrastructure services such as transport are prone to surface- and groundwater flooding. Though there are coastal flood management defences in place, these may be insufficient against the forecasted 1.12 metre sea level rise by the end of the century, placing over one million properties at risk in 2050.

Worst case scenario analysis undertaken by the British Geological Society forecast that by 2050, over 7,000 square kilometres of coast will be affected by coastal inundation, rising to more than 8,000 square kilometres by the end of the century. With housing availability already an issue in many areas, the loss of up to one million dwellings would put substantial strain on an already stretched housing market. There is currently no compensation route for the loss of private property or land due to coastal change, with residents having to shoulder the cost of demolition for houses on affected coastlines.

Coastal environment type for SCOPAC historic coastal landfills
England, 2019, per cent



Significant cost to move the sites inland

The 'Landfill Tax' would treat the transfer of old landfill to inland sites as 'new' landfill and would mean a levy of £100 per metre cubed on the landfill. This translates to a cost of over £1 billion, meaning removing the contents of the historic landfill sites is a prohibitive option, especially where it is unclear who has legal responsibility for the pollution caused by the sites.

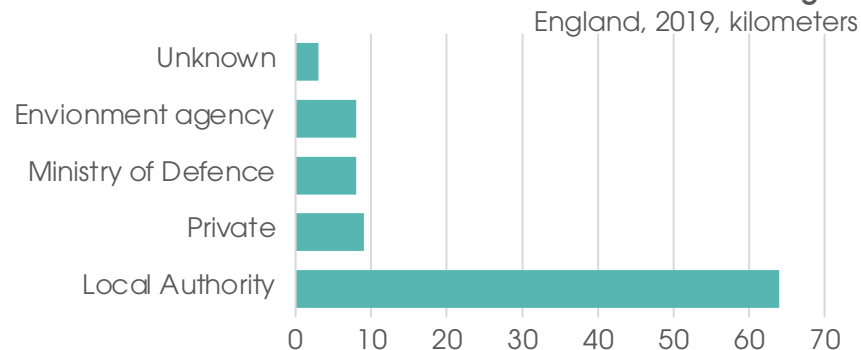
Despite most of the affected shoreline being maintained by local authorities, for three quarters of landfills there is no existing funding. Options such as defending the 80 high priority landfill sites and treating the waste would incur costs of £150 million and £400 million respectively. If not dealt with, a multitude of problems could unfold such as chemical spillage and increasing sea pollution, impacting the health of residents and the natural environment and negatively impacting coastal tourism and inshore fisheries.

Over one thousand landfill sites at risk of flooding

Most of the Standing Conference on Problems Associated with the Coastline landfill sites are in harbours and saltmarsh sites and are now close to environmentally designated areas, exposing people and wildlife to hazardous materials. When a vast proportion of these sites were filled, there were few regulations in place. It is now forecasted that half of the landfill could be exposed within the next century, having a detrimental impact on the environment including water quality on beaches affecting tourism.

A recent report from the LGA Coastal Special Interest Group and Coastal Group Network found that two thirds of authorities with coastal landfills have already experienced flooding or erosion at their sites, but only a handful of authorities have sufficient budgets to monitor and maintain the defences of coastal landfill sites. Although this is a challenge on a national scale with the associated environmental and health risks, this will have particular impact on coastal communities. The exposed rubbish of these sites and the potential impact on coastal water quality may put off visitors and damage residents' sense of pride and belonging - one of the main Levelling Up objectives.

Shoreline maintainer in front of landfill areas in SCOPAC region

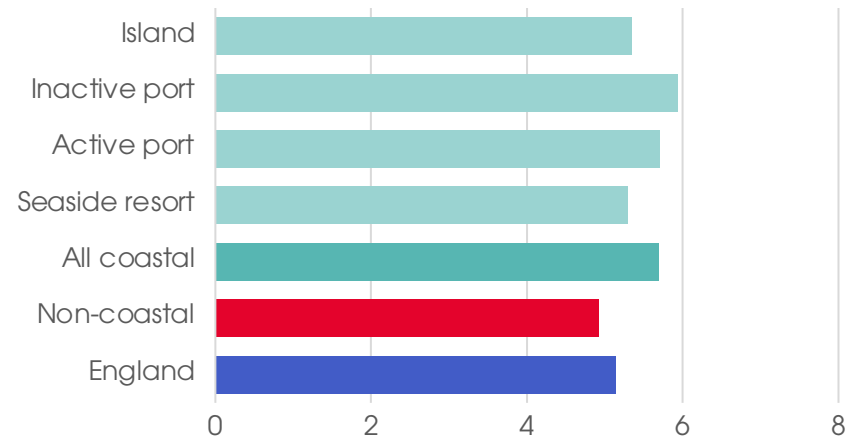


Carbon emissions higher on the coast

The green transition will come with its fair share of challenges - 'clean' energy sources are not without their carbon emissions. The materials required for solar panels, for example, require extraction, and wind turbine blades are buried rather than recycled. Nevertheless, striving towards renewable energy generation will be a key opportunity for coastal communities.

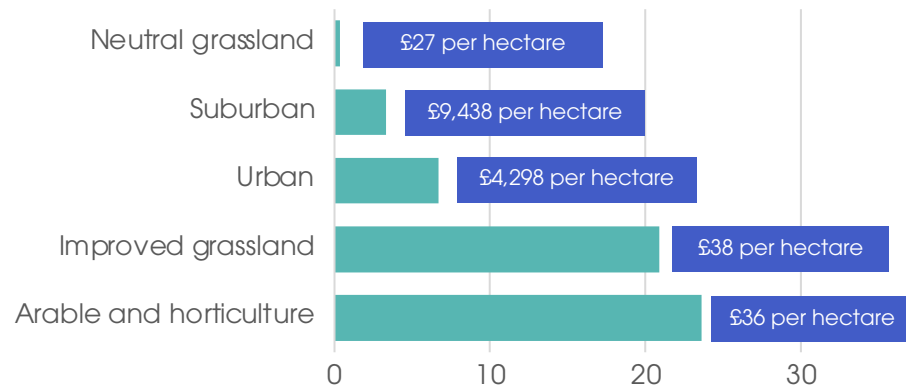
Currently, carbon dioxide emissions are higher by 0.7 tonnes per person in coastal areas, likely due to longer journey times, emissions from shipping vessels and more intense agriculture. The soil in coastal areas provides good conditions for agriculture. Though a challenge does present itself in the form of high levels of salt in the soil (salinisation), especially in low-lying coastal areas.

Total carbon dioxide emissions per person
England, local authority districts, 2020, tonnes of CO₂ emitted



Area of landcover receiving flood mitigation benefits from coastal saltmarsh and estimated annual value for each landcover type

England, thousand hectares, 2019



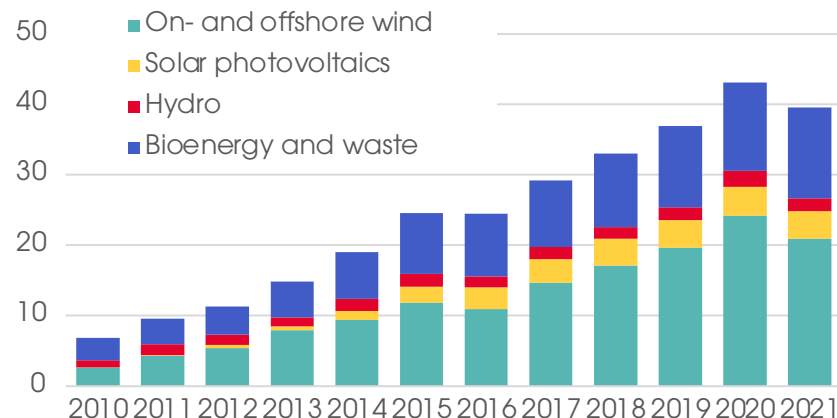
Restoring marine habitats can help sequester carbon and protect from floods

Restoring saltmarshes and other coastal and inshore marine habitats is an opportunity to protect coastal areas from floods, lessen the harm of climate change and increase local biodiversity that support livelihoods, including the likes of commercial fisheries and nature tourism. Properties and assets benefit from the flood protection they provide, with an estimated protected value of £1.8 billion .

Inshore marine habitats protect coastal communities from flooding and erosion by reducing wave energy and acting as a buffer. They also provide a great opportunity for carbon capture. In 2019, saltmarshes removed 81,000 tonnes of carbon dioxide equivalent. Steart Marshes, for example, captured the equivalent of the greenhouse gas emissions of 32,900 cars in four years.

Share of electricity generated by type of renewable energy

United Kingdom, per cent



Renewable energy generation on the rise

External global factors have disrupted energy markets, hiking gas and oil prices. The fragility of foreign imports has necessitated nations to look elsewhere for energy. The move away from importing energy will mean greater demand for domestic renewable energy.

For the first time ever in the United Kingdom, renewable energy generation outstripped fossil fuels in 2020. Another record broken the same year was the longest run on coal-free power, totalling 68 days, the longest period since the industrial revolution. However, there is concern that the green transition and the drive for renewables will be done unsustainably, with lasting impacts on coastal communities and marine environments.

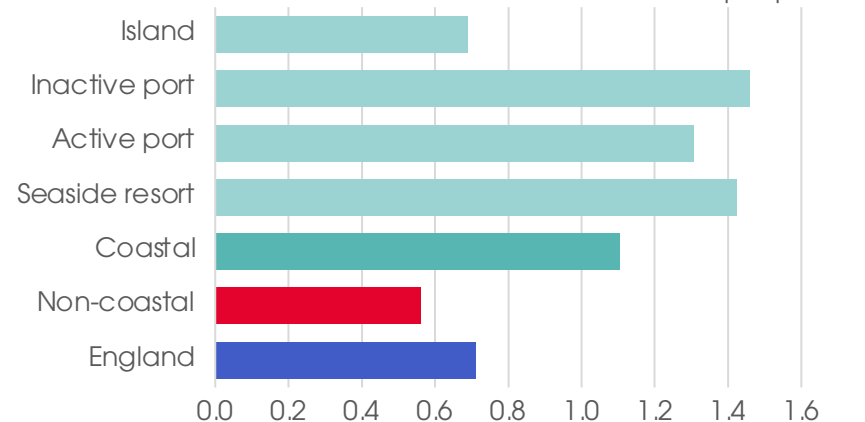
Coastal communities generate more renewable energy than the national average

Coastal communities are well known for their fishing, port and tourism sectors and, more recently, their renewables sector. Outperforming non-coastal areas in terms of photovoltaic and onshore wind generation, as well as total renewable energy generation, coastal communities are driving the United Kingdom's transition to green energy.

Contrary to some perceptions, the coast is at the heart of the renewables sector, contributing 0.5 megawatt hours per person more than non coastal areas, and with the capacity to generate more with the right funding and support from the government.

Total renewable electricity generation

England, local authority districts, 2021, megawatt hours per person



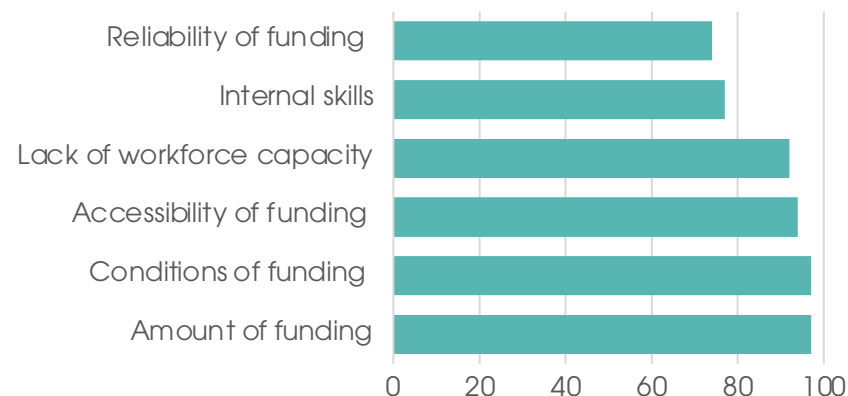
Green finance funding identified as a constraint at local level

In a survey distributed to Local Government Authority members, the main reoccurring barrier to tackling climate change was that of funding. Barriers related to the amount of funding, the accessibility of funding, the conditions attached and the reliability of the funding. Among the respondents, all identified funding as a barrier.

Half of the respondents said that short term funding required year-long contracts, but there is also a need for long term affordable finance than can be used for a wide range of projects and can connect across socio-economic and environmental drivers to deliver multiple benefits.

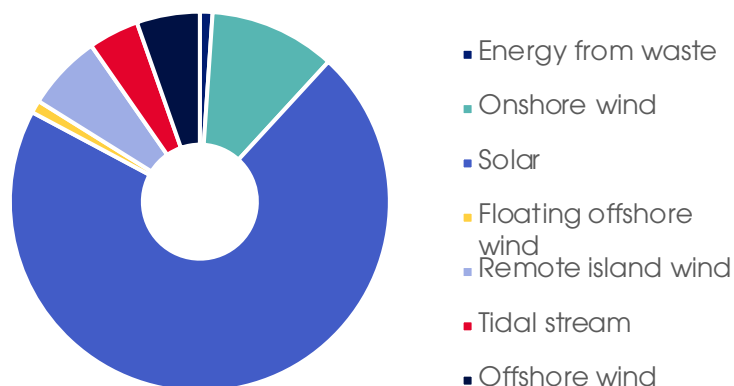
Main barriers to tackling climate change for local governments

United Kingdom, May 2022, per cent



Share of successful applicants for the Contracts for Difference scheme by type of technology

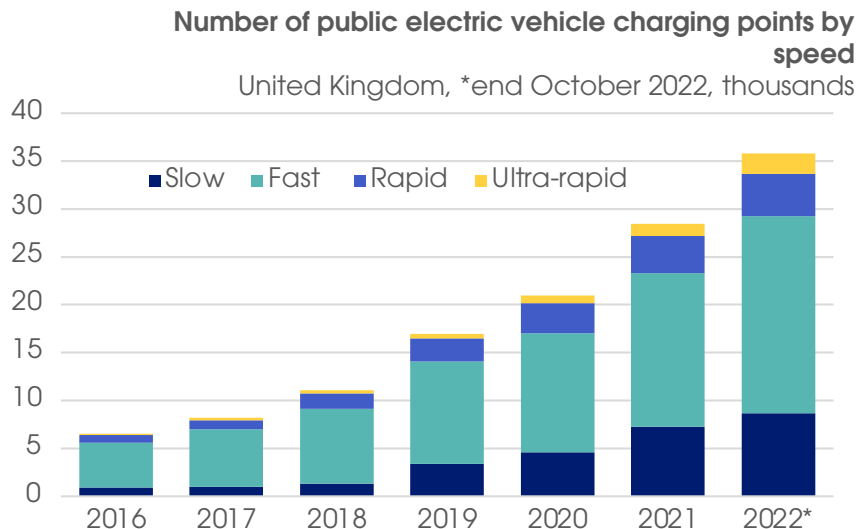
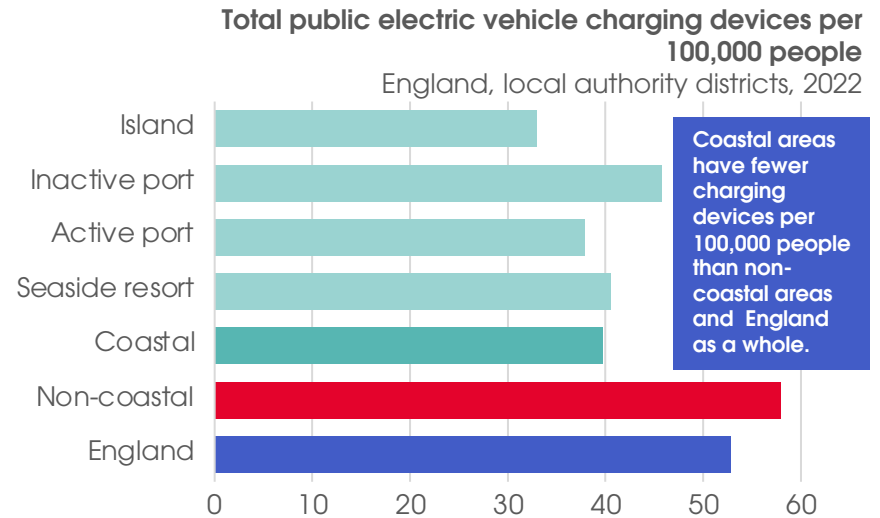
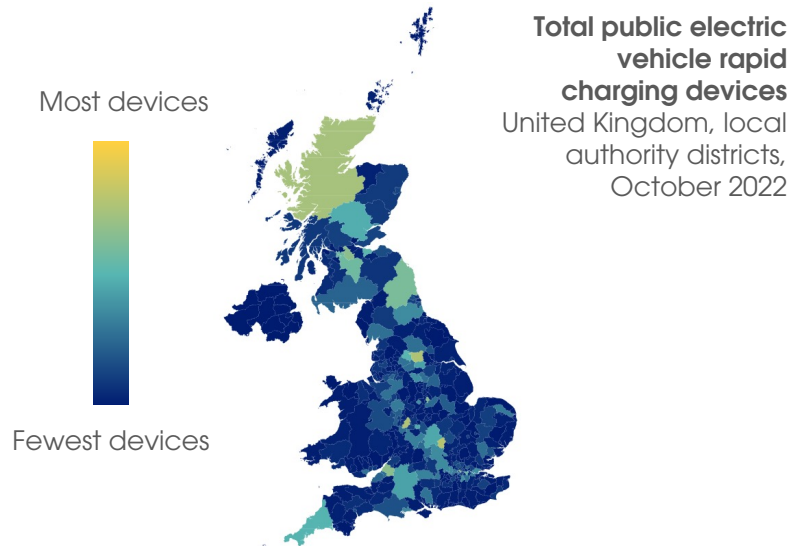
United Kingdom, July 2022, per cent



Emerging energy sources may be overlooked by support mechanisms

Certain types of renewable energy have been more successful in securing support mechanisms from the government's Contracts for Difference Scheme. Energy sources like wave and tidal, for example, have had fewer provisions made compared to offshore wind. In the fourth allocation round of the Contracts for Difference, of the 93 successful applicants, only four were of a tidal stream technology type.

Although tidal stream power is an expensive option, an opportunity could lie in further renewable innovation such as offshore carbon capture and storage. As a major pillar of the government's green policies, further development would benefit coastal communities as it will draw in work opportunities, with many energy companies looking to upskill local workforces rather than bring in workers.



Fewer EV charging points in coastal areas

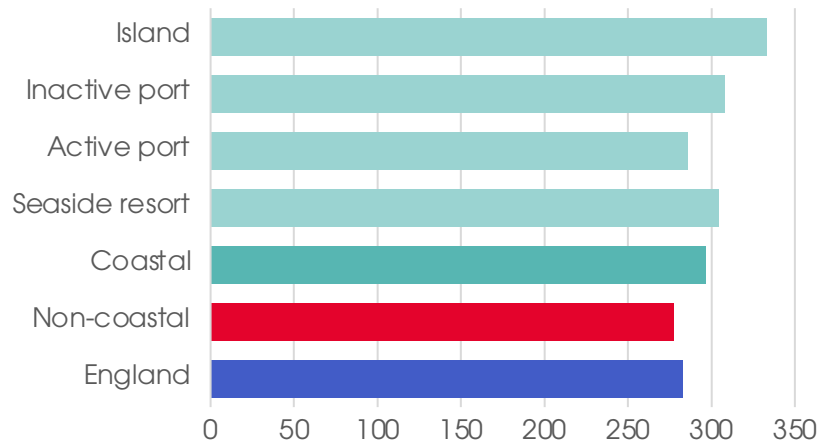
Intrinsic to the uptake of electric vehicles are the number of accessible electric vehicle points. Of the 6,500 rapid charging points in the United Kingdom, proportionally more are clustered in non-coastal areas. This is also the same for public charging devices as a whole, with 40 devices per 100,000 residents in coastal areas compared to 58 devices in non-coastal areas.

In tourist hotspots, charging points tend not to be installed where visitors go, but rather are based on resident demand, placing extreme strain on resources in the summer season which can have significant negative impact on the visitor economy. If visitors were included in the metric, the ratio would be even poorer for coastal communities. In addition, there are more licensed cars per head of population in coastal areas, likely due to pre-existing transport connectivity challenges. If the disparity between electric vehicle charging points does not narrow, this challenge could inflate.

Source: Zap-map, Department for Transport, Office for National Statistics

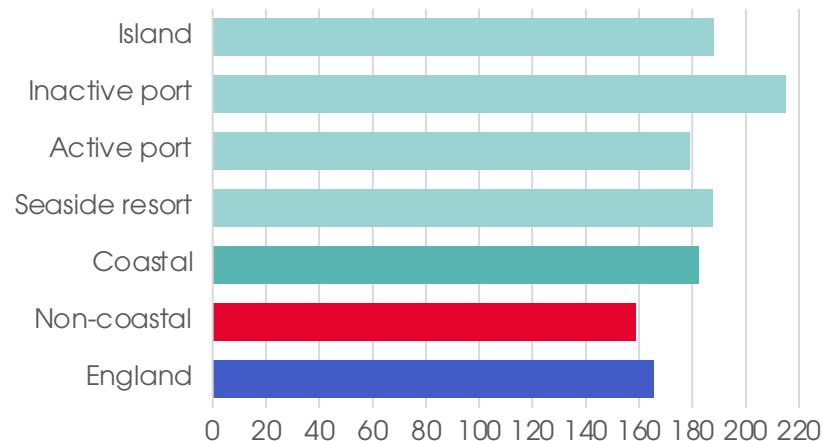
Number of licensed petrol cars per 1,000 people

England, local authority districts, Q3 2022



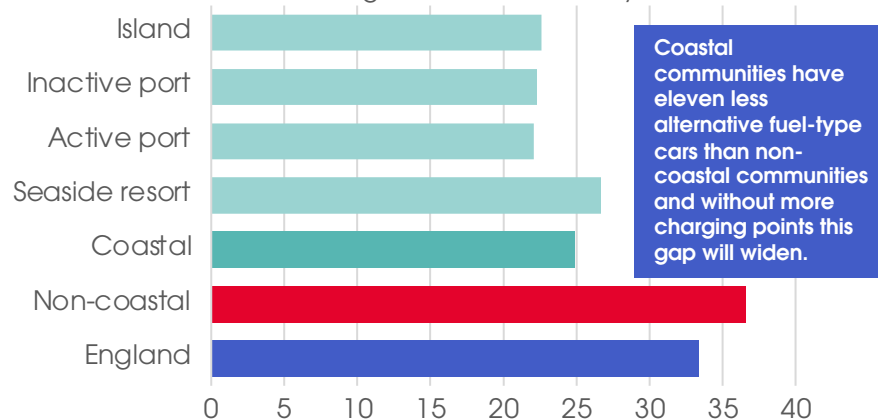
Number of licensed diesel cars per 1,000 people

England, local authority districts, Q3 2022



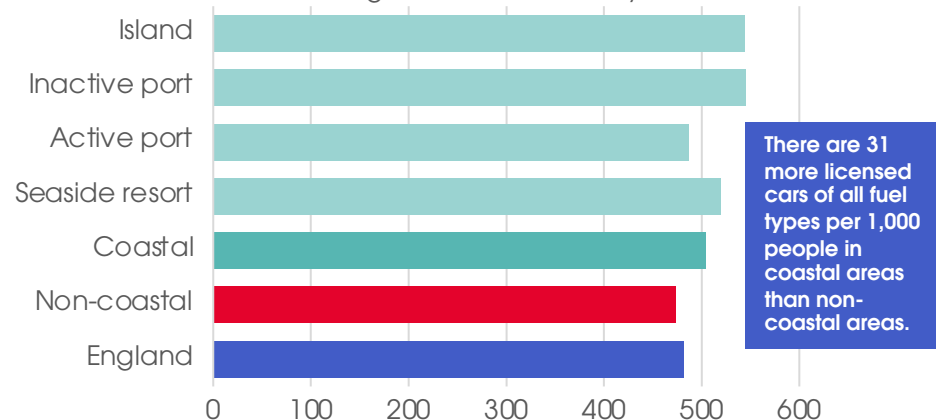
Number of licensed cars using other types of fuel per 1,000 people

England, local authority districts, Q3 2022



Number of total licensed cars (all fuel types) per 1,000 people

England, local authority districts, Q3 2022

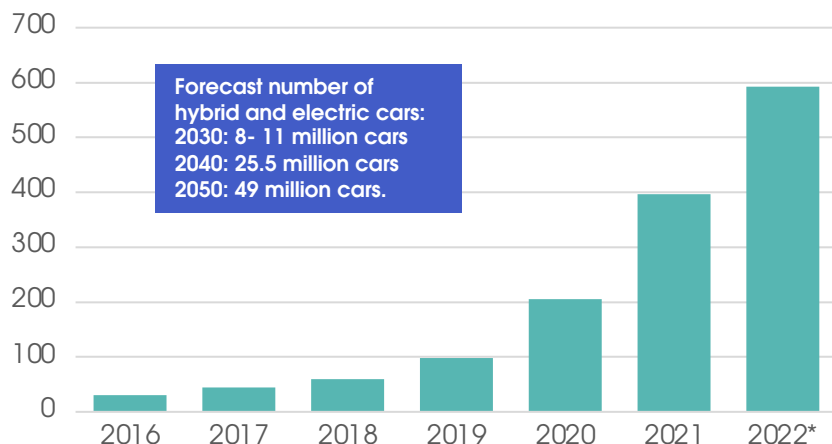


Changing attitudes will impact the uptake of eco alternatives

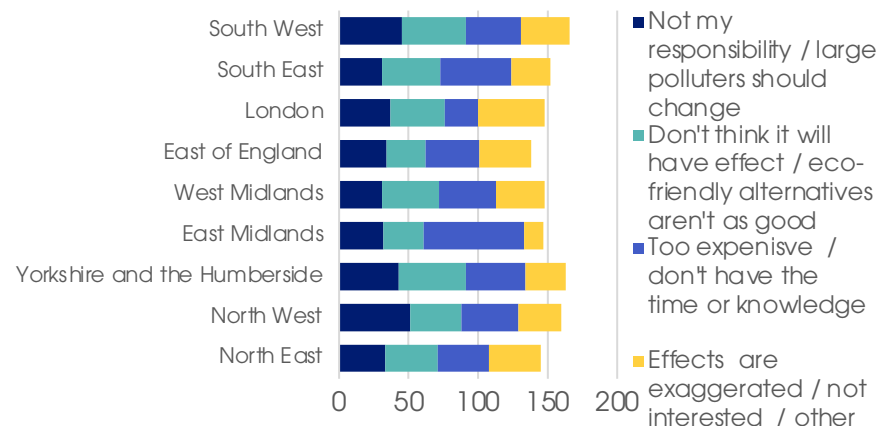
With the cost-of-living crisis placing pressure on people’s personal finances, it is even more of a challenge to encourage the public to make lifestyle changes when they don’t think it will have a substantial impact. However in recent years, there has been a major shift towards eco-transport alternatives, with nineteen times as many battery-powered electric cars on the roads in 2022 than there were in 2016.

While a move away from petrol and diesel cars is conducive to the government’s target of banning the sale of new combustion engine vehicles by 2030, the use of electric vehicles increase pressure on the national grid, presenting challenges not just for coastal communities, but for the nation as a whole.

Cumulative number of battery-electric cars
United Kingdom, *end October, thousands



Reasons for not making changes to lifestyle to help tackle climate change
England, 2021, per cent*



Number of hybrid and electric cars is set to increase five-fold

To meet the demand of the electric vehicles market, 40 to 50 new charging points would need to be installed across the United Kingdom per day until 2035. Peak season will see a demand for charging stations almost double in tourism hotspots, increasing the need to scale up installation. Unless the need is met, seaside resorts and coastal towns could miss out on tourists who plan their routes based on where they can charge their electric vehicles.

The domestic visitor economy would benefit if funding were provided to install more electric vehicle charging points in coastal communities, with the potential to increase day trip numbers.

*Note: Percentage surpasses 100 as respondents were allowed to pick more than one option. Source: Office for National Statistics – Opinions and Lifestyle Survey (top), Society of Motor Manufacturers and Traders and Local Government Authority and the Climate Change Committee (bottom)

Strengths, weaknesses, opportunities and threats identified	Boosting productivity, pay, jobs and living standards by growing the private sector	Spreading opportunity and improving public services	Restoring a sense of community, local pride and belonging.	Empowering local leaders and communities
Renewable energy generation	X			
Green finance funding	X	X		X
Electric vehicle charging points			X	
Low carbon jobs	X	X		
Sustainable coastal defences	X	X	X	
Restoration and enhancement	X	X	X	X
Carbon capture	X		X	
Coastal flooding and erosion	X	X	X	
Historic coastal landfill sites	X		X	
Loss of coastal and inshore marine habitats	X	X	X	
Lack of environmental data and evidence	X	X		

Summary of green values strengths, weakness, opportunities and threats in relation to the objectives of Levelling Up

Marine
environment
and
infrastructure

Nation benefits from marine infrastructure

Strength

- Innovative port industry
- History as a trading nation

Weakness

- Reduction in fish stocks
- Loss and decline of coastal, inshore and offshore marine habitats

Opportunity

- Port freight tonnage set to increase
- Value of port supply chain
- Potential for carbon storage offshore
- Sustainable fishing practices
- Restoring coastal, inshore and offshore marine habitats

Threat

- Competition for marine space
- Ongoing climate change crisis
- Fragile marine ecosystems
- Low levels of capacity and resource within marine / coastal teams
- Poor quality marine data and evidence

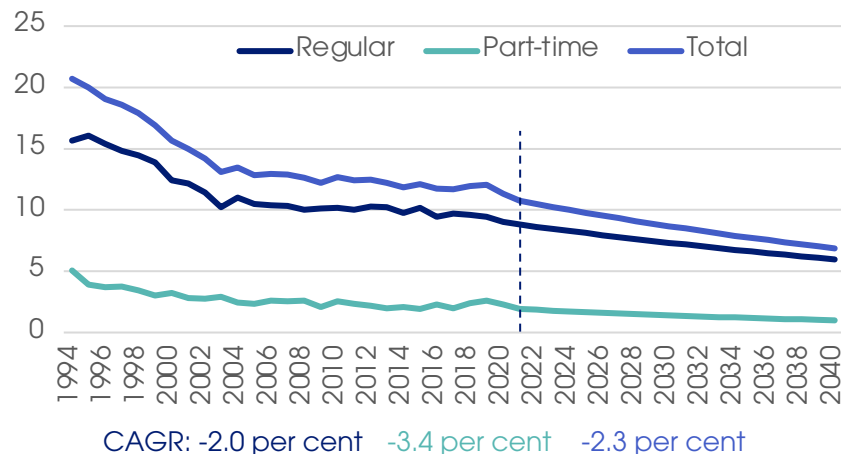
Marine development and infrastructure are pivotal to coastal communities, with their related industries presenting both challenges and opportunities

Coastal communities have been facing a decline in the fishing fleet for a number of decades, with jobs in the catching sector declining by five per cent in the last year. But changing preferences and a smaller fleet offers the opportunity for the fishing industry to develop a more sustainable, higher value offer for consumers.

While employment in fishing has been in decline, ports remain a key job provider in coastal communities, contributing more to the economy than comparative industries such as rail and air. Ports provide bases for offshore wind farms, which add value to the local supply chains, not least through job creation. Official forecasts expect port freight tonnage to increase by nearly 40 per cent, in keeping with the trade demands of an increased and more interrelated population, extending an opportunity for the coastal community's workforce. The creation of new Freeports will in turn create much needed jobs in some of the most disadvantaged areas of the country.

Regeneration of the sea bed is another important factor within marine development. Of the total United Kingdom sea-scape, around 40 per cent is now dedicated to Marine Protected Areas or 'Blue Belts'. Although some of these zones allow fisheries and renewable energy businesses to operate, a few have become no-go areas. However, these no-go areas benefit fisheries as they replenish fishing stocks that spill over into zones where fishing is permitted and can increase the eco-tourism offer through increasing overall marine biodiversity, attracting charismatic species such as marine mammals. With global environmental commitments intensifying, the scale of wind farms needed to reach energy targets will require significant expansion, which will mean a delicate balancing act between marine conservation and the development of infrastructure. Innovative practices that combine marine infrastructure with designs that support marine biodiversity should be championed.

Trend of total number of fishers
United Kingdom, thousands



Steady fall in the fishing fleet, but importance remains

The United Kingdom has a rich fishing heritage, with a reputation for landing some of the highest quality seafood in the world. But the number of workers in the fishing industry has been steadily declining in recent years, with fewer than 7,000 fishers expected to be remaining by 2040. With many fisheries exported to Europe, fishers have been greatly impacted by Brexit.

Although not the mainstay it once was, the sector still has a lot to offer coastal economies. In 2021, government announced a £75 million boost for the fishing industry to help modernise ports, attract new workers and reduce carbon emissions. The fund is part of a broader £100 million United Kingdom Seafood Fund with the aim to level up coastal communities. As consumers' preference are changing, there is an opportunity for the fishing community to focus on sustainable fishing practices and products, for which it will be able to command a higher price.

Protected areas can help to regenerate the seabed

Marine Protected Areas or Marine Conservation Zones are sea spaces consisting of nationally important habitats and species. How they are managed vary, with some restricting activity. These areas can generate income for coastal communities through tourism and scientific study of biodiversity conservation, increasing the resilience of the wider marine ecosystem to the benefit of all. Lyme Bay's protected reef, for instance, supports the common lobster and has increased the rewards for pot fisheries.

Fisheries stakeholders reported protected areas having different consequences on fixed and nomadic fleets, with some boats being squeezed out of their usual fishing grounds. They stressed the strategic importance to local communities of a fleet that can't simply move to other fishing grounds, and the knock-on impact this can have for other businesses, particularly in tourist destinations.

Offshore Marine Protected Areas
United Kingdom, 2020

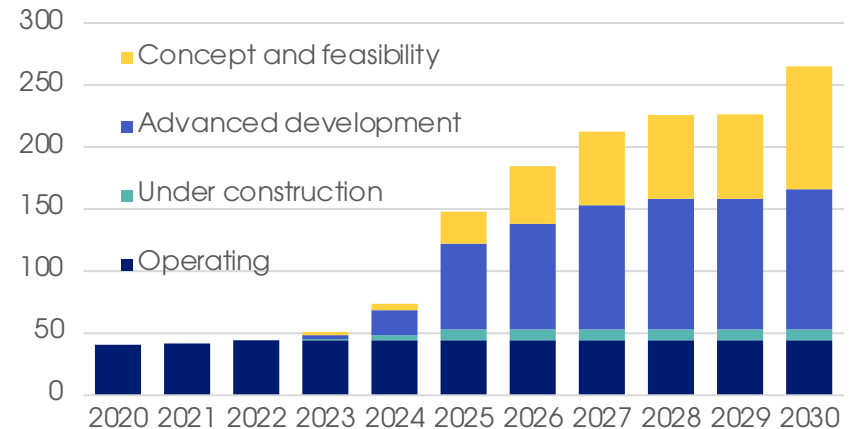


Opportunity for joined-up offshore renewables

Carbon capture, the process of reducing carbon emissions from industrial processes by transferring the carbon underground, is forecasted to remove 265 metric tonnes of carbon dioxide annually by 2030. This is around a fifth of what is required in a net zero scenario. Offshore wind farms are well-positioned to capture carbon dioxide from the atmosphere and store it beneath the sea floor, reducing the need for onshore pipelines that transport the carbon.

Pairing wind farms with carbon capture would directly benefit the environment by increasing carbon capture capacity while simultaneously providing an opportunity for coastal communities to research and collaborate together. This would increase the potential for partnerships with marine colleges, and offer long-term, higher paying career options for local people.

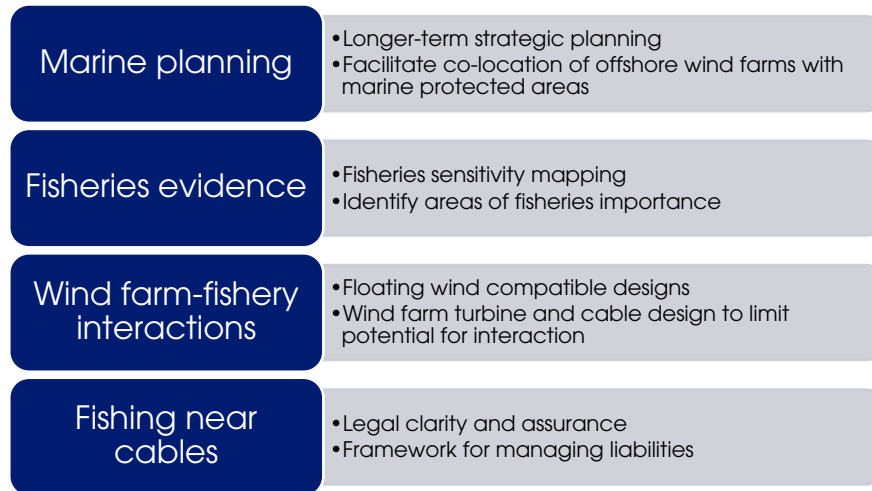
Capacity of large scale carbon capture projects
Current and planned global projects, metric tonnes of carbon dioxide per year



Competition for marine space set to increase

Net zero ambitions will require an increase in the number of offshore wind farms, including the expansion of pre-existing fields alongside the creation of new sites. This growth may create a challenge for coastal communities' fisheries where fishing grounds are revoked during the green transition. Further conflict could arise between landing offshore cables into coastal communities and the use of farm land for necessary infrastructure to support offshore sites.

While there is yet no definitive proportion of sea that will host wind farms, the scale necessary to meet global environmental commitments will see significant areas previously predominantly used for fisheries become out of bounds. A balance will need to be struck between the desire to increase renewable energy generation and ongoing access to fishing grounds by the fishing fleet.



An agenda for the coexistence between offshore wind farms and fisheries



Offshore wind farms add value to local supply chains

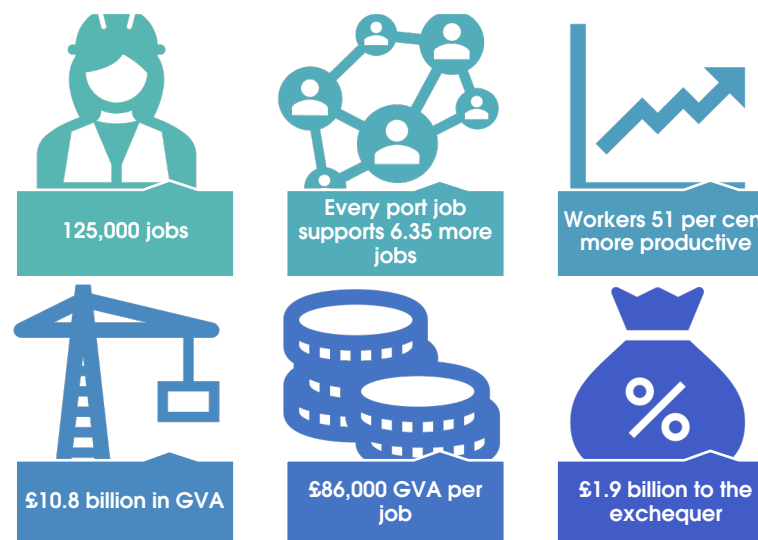
One of the core aspects of ports are the bases for offshore wind farms. Offshore wind farms are usually built in areas with pockets of deprivation and every offshore wind farm is assigned a community fund. Dogger Bank, which will be the world's largest wind farm upon completion, is based in the Port of Tyne and local firms in South Tyneside have acquired contracts through this.

A wind farm location can add value to the supply chain through both the construction and the operation phases. Construction supports the wider area in the short term, while operation supports the area in the long term, creating more than 400 jobs and more than 2,000 jobs respectively.

Ports contribute more than air and rail

With 95 per cent of the United Kingdom's global trade conducted via ports, they are hubs for job creation. Ports create six more indirect jobs for every direct job along the supply chain, having a knock on benefit to employment in coastal communities. Developing relationships between ports and educational establishments will be important for young people to better understand the breadth of port jobs available.

The outlook for the ports industry is increasingly global, and as such, opportunities for coastal communities lie in nurturing collaboration and implementing new business models geared towards spatial strategy. Forecasts for 2030 tend to agree that cargo will benefit from an increased use of technology, as well as an increased focus on sustainability with ports being bases for offshore wind farms.



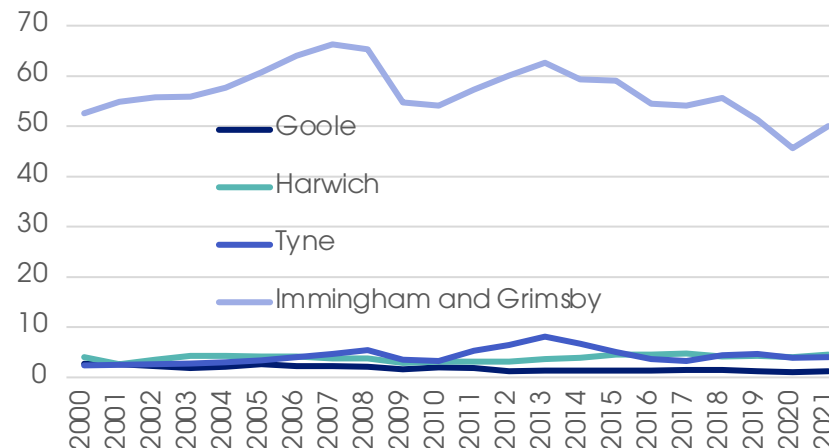
The economic impact of ports
United Kingdom, 2022

Ports support local jobs and the local community

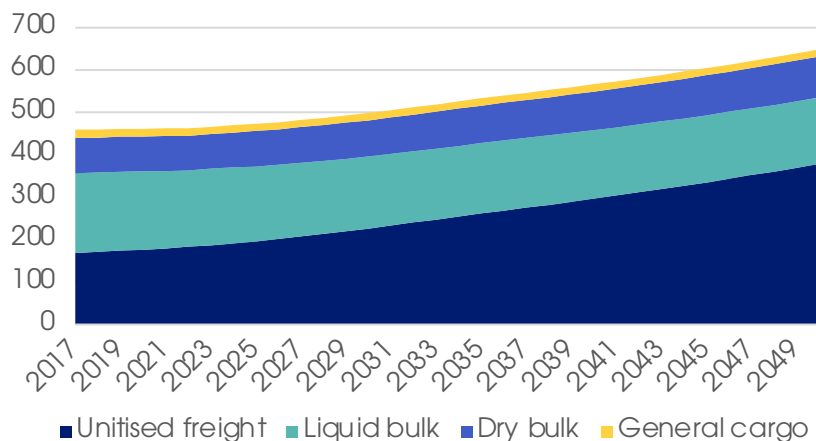
The United Kingdom's ports are the gateways through which the majority of the country's imports and exports travel. By tonnage, the Port of Immingham and Grimsby in Lincolnshire is the largest port in the nation, seeing over 50 million tonnes' worth of cargo travelling in and out in 2021 alone. It supports 10,500 jobs at national level, contributing more than £700 million to the economy annually.

Further up the east coast, the Port of Tyne contributes around £680 million a year to the regional economy and supports approximately 14,000 full-time equivalent jobs - 1.4 per cent of all employment in the North East.

All freight cargo travelling inwards and outwards
Major ports in districts*, million tonnage



Central forecast for total port freight tonnage
United Kingdom, million tonnes



Trade set to increase even further

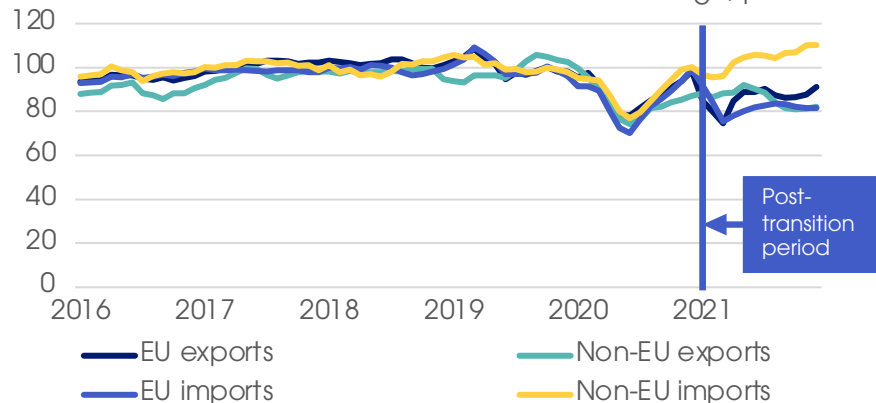
The Department for Transport have forecasted that the growth of port freight traffic will be driven by unitised freight cargo, as liquid bulk traffic is set to decrease given the decline in crude oil traffic and the trend of shifting from liquid bulk to tank containers for some distributors. Meanwhile, dry bulk is forecasted to increase in line with the historical increase linked to the trade of biomass.

With more freight passing through ports as a result of an increase in trade in the future, more jobs will be created along the broader supply chain, benefiting coastal communities in particular. However, as ports rely on inland road networks, it is predicted that road congestion will slightly increase. According to the Department for Transport's national road traffic projections, large good vehicle traffic is forecasted to increase from 57 billion vehicle miles in 2025 to 77 billion vehicle miles by 2060, following a predicted rise in gross domestic product.

*Note: Torquay is not a major port for freight. Source: Department for Transport (top right and bottom left), Port of Tyne (top left)

European Union and non-European Union goods trade

United Kingdom, 2019=100, three-month rolling average, per cent



Freeports will support jobs and investment

In their relative short history, freeports are already promising drivers of growth. In 2022, Humber Freeport facilitated Pensana in securing investment to develop Europe’s first rare earth processing hub. This multi-million pound investment is set to represent a five per cent share of the world market by 2025.

Teesside Freeport is steering investment into the local area with the construction of an offshore wind manufacturing facility at Teesworks. When operational, this project is set to create 750 direct jobs and 1,500 indirect jobs along the supply chain.

Freeports provide growth prospects

Between 1984 and 2012, the United Kingdom had seven freeports and the European Union had 80 economic ‘free zones’ across its member countries. Following Britain’s departure from the European Union, the government announced eight new Freeports. Given the pandemic it is difficult to trace the impact Brexit has had on the trade of imported and exported goods, but Freeports aim to maximise the potential for growth provided by ports.

Freeport areas will receive some tax reliefs and simplified customs arrangements to disperse the benefits of trade and globalisation across all regions and help promote regeneration. It is envisaged that the Freeports will become hotbeds of innovation, creating thousands of high-quality jobs by delivering investment into to some of the most disadvantaged coastal communities.



Strengths, weaknesses, opportunities and threats identified	Boosting productivity, pay, jobs and living standards by growing the private sector	Spreading opportunity and improving public services	Restoring a sense of community, local pride and belonging	Empowering local leaders and communities
Innovative port industry	X	X		
History as a trading nation	X		X	X
Reduction in fish stocks	X		X	X
Loss and decline of coastal, inshore and offshore marine habitats	X	X	X	X
Port freight tonnage set to increase	X	X		
Value of port supply chain	X	X		X
Potential for carbon storage offshore	X			
Sustainable fishing practices	X	X	X	X
Restoring coastal, inshore and offshore marine habitats	X	X	X	X
Competition for marine space	X	X	X	X
Ongoing climate crisis	X	X	X	X
Fragile marine ecosystems	X	X	X	
Low levels of capacity and resource within marine / coastal teams	X	X	X	X
Poor quality marine data and evidence	X	X		

Summary of marine environment and infrastructure strengths, weakness, opportunities and threats in relation to the objectives of Levelling Up

Education and careers

Opportunities to grow skilled workforce

Strength

- Lower unemployment rate

Weakness

- Local access to high quality skills training
- Lack of further education establishments
- Strict educational delivery structure
- Lack of aspiration
- Teacher retention

Opportunity

- Flexible working
- Remote working
- Research and development projects
- Green jobs

Threat

- Shortage of investment
- Attainment gap
- Public transport links
- Digital connectivity

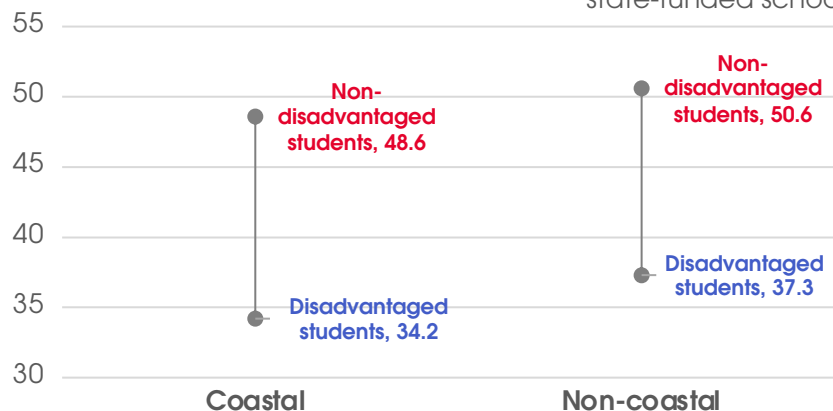
Although coastal areas currently have lower attainment levels for pupils, emerging technologies and the rise of hybrid working offers an opportunity to grow the skilled workforce

Coastal residents are less likely to have a degree, and disadvantaged students are worse off in coastal areas than non-coastal areas. Interlinked with educational isolation, recruitment and retention difficulties, is the struggle with public transport connectivity. Students in coastal areas have a longer commute to both primary and secondary schools, while young people looking to go on to further education are often forced to move in order to access their desired course.

An umbrella challenge covering coastal regions is that of digital connectivity. As an ever increasing number of services move online, households and businesses without access to a decent internet connection risk being left behind. With the right funding channelled in coastal communities, more research and development programmes can take place and look to close the digital gap, making towns on the coast an even more attractive place to live, work and visit.

The rise of home working during the pandemic, and the increase in companies adopting flexible working patterns, presents an opportunity for coastal communities to draw in skilled, higher paid young workers. Where previously employees were limited to living within a commutable distance to their place of work, the new normal working environment means many can and are choosing to live outside urban centres as they seek a better work-life balance. Attracting skilled, higher paid hybrid workers will have knock-on benefits for the local economy, as workers spend their money with local businesses. Similarly, the switch to online learning during covid offers an insight into new ways of education delivery, with a mix of at home and online learning offering the chance for young people to gain qualifications without the need to permanently relocate. The push to upskill locals is imperative, providing young people with essential role models.

Attainment scores for disadvantaged and non-disadvantaged students
United Kingdom, 2017/18, attainment 8 points at state-funded schools



Attainment levels are lower for disadvantaged coastal students

The long-term prospects for children and young people in coastal areas are being impacted early on. Typically, disadvantaged students in coastal areas achieved three grades lower, or 3.1 attainment 8 points lower than their peers living in non-coastal areas.

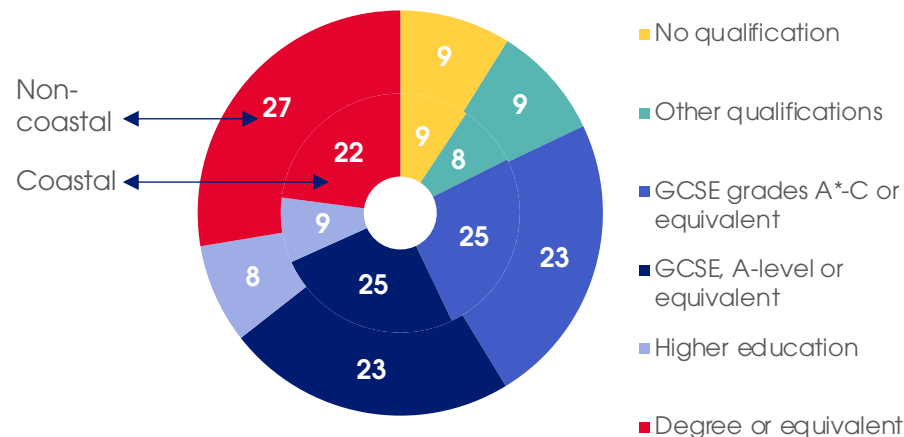
A 2019 review into the attainment gap found that disadvantaged students are more likely to be taught by teachers with fewer years experience and with lower-qualifications. This issue is amplified by teacher retention at a geographical level. Improving education early on would help tackle some of the longer-term deprivation issues that stem from poor educational outcomes. Providing flexibility within the curriculum would help make learning relevant to young people in coastal areas wishing to enter the local maritime sectors.

Fewer people with degrees live on the coast

The geography of coastal areas means often young people have to leave their local area to attend university. Once they have completed their degree studies, it may not be possible for them to get a job back home in their chosen field. The so-called 'brain drain' from coastal communities into urban centres means fewer residents on the coast are educated to degree level. Even those with degrees who wish to work and live on the coast are often priced out of the local housing markets.

Levelling up aspires to increase the number of people successfully completing high-quality skills training in every area, and coastal authorities offer the opportunity to contribute towards that aim. The new normal way of working, which we explore in more detail later, could be one way to attract skilled workers to live and work in coastal communities.

Highest level of education attained
England and Wales, 2019, per cent

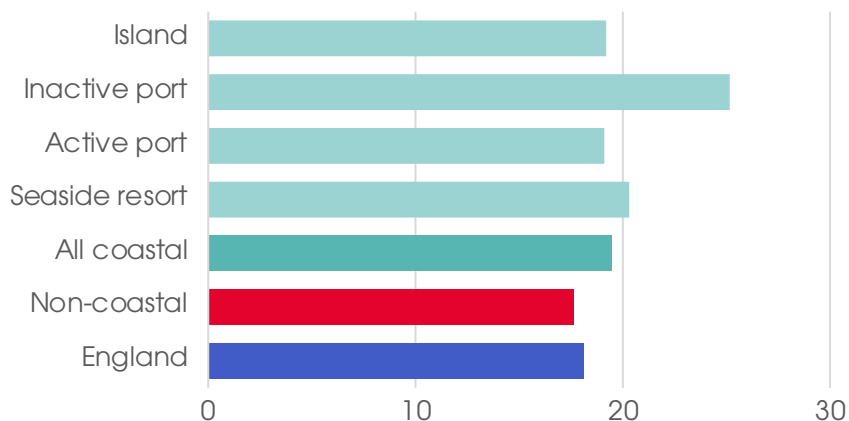


Poor public transport limits prospects

There is a general feeling that the coastal transport network is too often considered the end of the line for the government when making decisions about planning and investment. These transport constraints feed into many of the challenges faced by coastal communities.

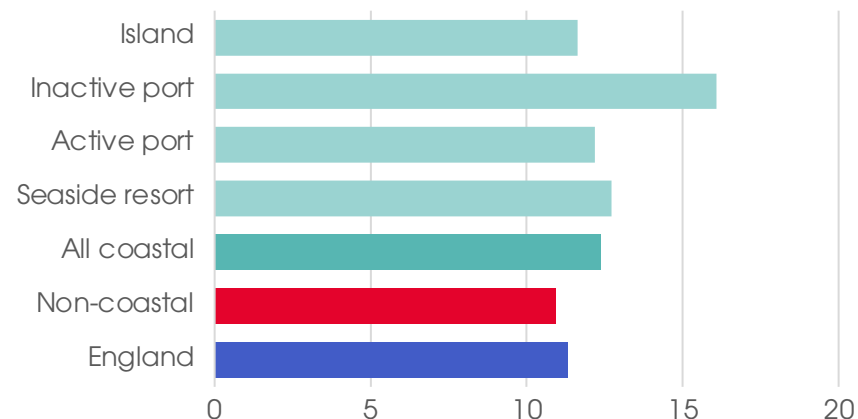
The length of the school commute can have impacts on a pupil's quality of education and a long work commute can hinder productivity and worker health. For those looking to undertake a training programme or a college course, attendance can often be reliant on multiple, expensive bus journeys. For those living in areas without a frequent public transport service or who do not have access to a car, their options for in-person further education are close to non-existent.

Average time to the nearest secondary school by public transport
England, local authority districts, 2019, minutes



Average time to the nearest major employment centre* by public transport

England, local authority districts, 2019, minutes



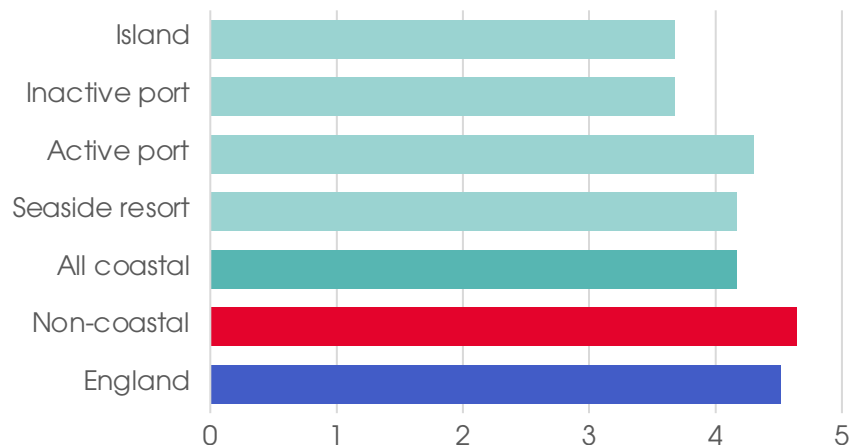
There's an opportunity to pilot alternative schemes

Traditional public transport networks are simply just not a financially viable option for some areas. Where this is the case, there is the potential to pilot new and alternative forms of transport. Community-led shared transport schemes, smaller electric mini buses, or bookable electric cars are all examples we heard about during interviews. Support and investment to help facilitate such schemes would help government's Levelling Up aim of improving public transport standards.

There is a similar opportunity for exploring alternative ways to deliver skills and education training to those on the coast, such as the Lincolnshire Higher Skills Programme, which supports the development of key workers in small and medium-sized businesses. During the pandemic, online learning became the norm, and finding alternative ways to delivery training through a mix of in-person and at-home learning could be one option to increase skill and attainment levels on the coast.

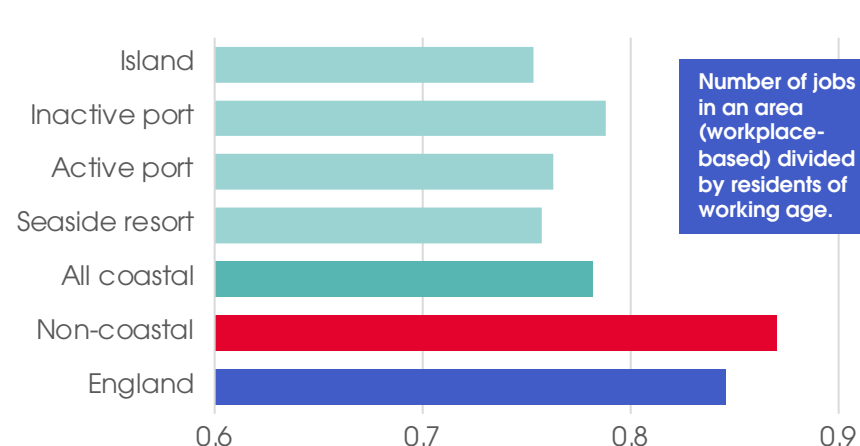
Unemployment rate

England, local authority districts, 2021, per cent



Jobs density

England, local authority districts, 2020, per cent



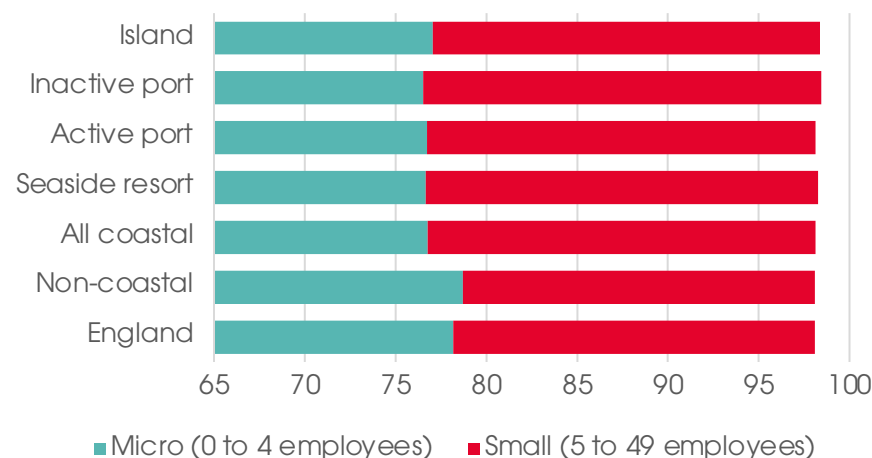
Harder to secure private investment outside London

The first aim of Levelling Up is to boost productivity, jobs and living standards by growing the private sector. In order for coastal communities to feel such a boost, more investment will need to be channelled in their direction. Smaller coastal businesses are at a disadvantage because even though 81 per cent of small and medium enterprises are located outside of London, the city receives 62 per cent of total investment.

There is also a correlation between the routing of investment and the distance of investor from recipient business. In 82 per cent of equity investment stakes, the investor and business are within two hours of each other and 61 per cent are within one hour. This makes it less likely that businesses on the coast will be able to secure private investment unless they are close to a major urban centre.

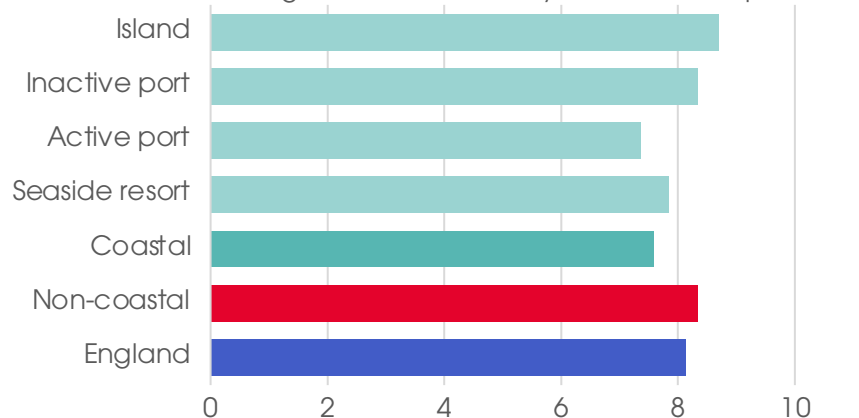
Share of enterprises that are small and micro

England, local authority districts, 2022, per cent



Proportion of workers that mainly complete work from home

England, local authority districts, 2020, per cent



Remote working provides chance to relocate to coast

The pandemic caused many workers to rethink their work-life balance and reassess where they wanted to live. The realisation from employers and workers that a significant number of jobs can be done remotely without a loss of productivity has opened up large areas of the country which were previously out of bounds to commuters.

Coastal communities would benefit from an increase in working-age residents, while also being able to retain young local people who would previously have had to move away to find work. With remote jobs tending to be higher paid, those higher incomes will now be spent in the local economy, supporting small local businesses. Relocation, however, will be affected by the coastal housing crisis and the high number of properties being used as second homes and holiday lets.

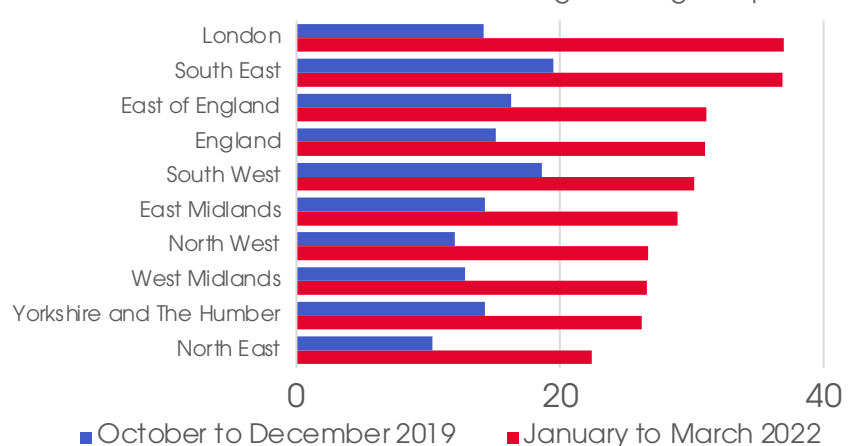
Opportunity for businesses to attract new talent

The Organisation for Economic Co-operation and Development rated the United Kingdom as one of the most flexible places in which to operate a business, and the rise in hybrid working has offered additional benefits for employers.

Businesses that don't require employees to be physically present to do their jobs are no longer limited by geography, and the pool of potential employees has opened up to include any qualified person with a decent broadband connection. By working with businesses, coastal authorities can promote their area as an attractive location in which to live and work.

Share of workers who mainly work from home or use home as a base

England, regions, per cent

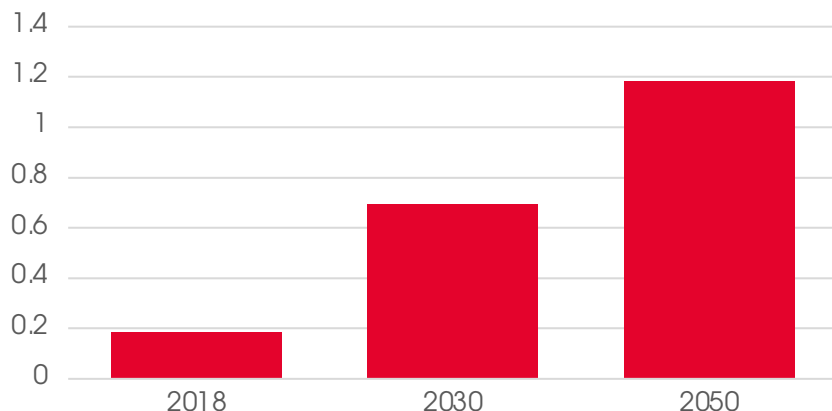


Green transition will see a more even split of low carbon jobs

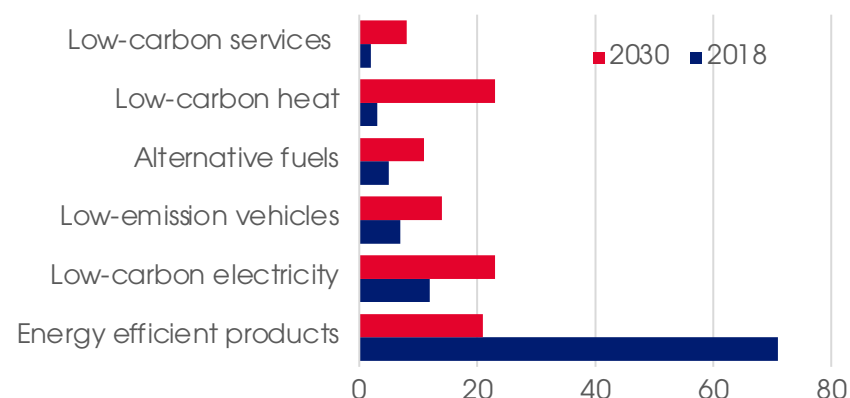
While energy efficient product related employment accounted for 71 per cent of the low carbon and renewable energy economy jobs in 2018, it is expected that by 2030, approximately half of the jobs will be in generating clean electricity and ensuring the delivery of low-carbon heat for residents and businesses.

With coastal communities already at the forefront of renewable energy generation, the potential for expansion provides an opportunity for coastal communities' job prospects, especially with salaries in the renewable energy sector more competitive than ever.

Number of low carbon and renewable energy economy jobs
England, millions



Share of low carbon and renewable energy economy jobs
England, per cent



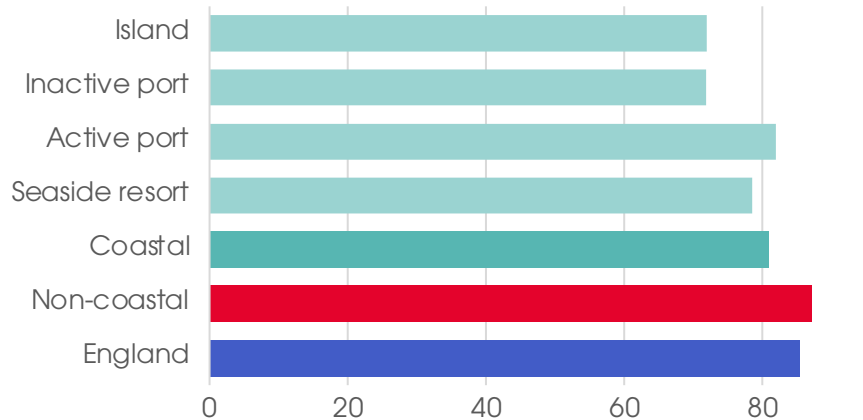
Over one million jobs predicted in low carbon and renewable energy sectors

Between 2030 and 2050, the number of low carbon direct jobs could increase by close to half a million. With coastal areas' dominance in renewable energy generation, this could see not just more jobs created, but an opportunity for more skilled and higher paid jobs.

The infrastructure for many offshore wind farms, for instance, has been built in areas of deprivation, with every site having a community fund. More wind farms, along with other low carbon energy generation sites, would add value to the supply chain and support the wider area in terms of both construction in the short term and operation in the long term.

Percentage of indoor areas that receive 4G signal from all four providers

England, local authority districts, 2022, per cent



Businesses reliant on mobile internet

Many businesses on the coast are mobile, or are located in an area where it is not possible to access a fixed line connection. In areas where it is not feasible to install gigabit or superfast broadband, the provision of decent broadband cellular network technology is especially important.

In our increasingly cashless society, businesses like sea tour boats or food vans need to be able to take card payments wirelessly, which they can only do with an adequate mobile signal. Prioritising the roll out of 5G and its successive generations in coastal communities that are unlikely to get superfast broadband would mean businesses are not penalised, and can continue to develop and grow their offer.

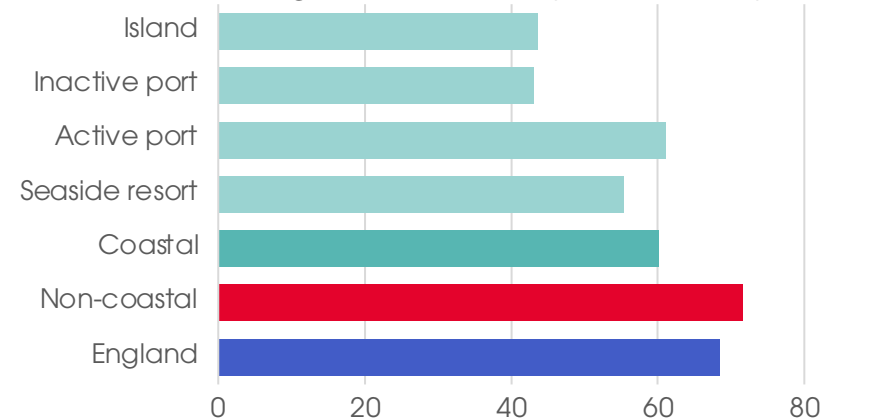
Digital connectivity is increasingly important

To take full advantage of the opportunities of home and hybrid working, a minimum standard of digital connectivity will be required. Currently, coastal communities have fewer premises with gigabit capable broadband than non-coastal communities and England as a whole. Coastal areas also have a lower proportion of indoor areas receiving both 3G and 4G signal from all four providers, or even coverage from at least one mobile network provider.

Improving digital connectivity in coastal areas would align with the broader aims of Levelling Up and help improve pay, employment, productivity and global competitiveness, both in terms of businesses digital operations and the uptake of working from home.

Percentage of premises with gigabit capable broadband

England, local authority districts, 2022, per cent



Strengths, weaknesses, opportunities and threats identified	Boosting productivity, pay, jobs and living standards by growing the private sector	Spreading opportunity and improving public services	Restoring a sense of community, local pride and belonging	Empowering local leaders and communities
Lower unemployment rate	X	X		
Local access to high quality skills training	X	X		
Lack of further education establishments	X	X	X	
Strict educational delivery structure		X		
Lack of aspiration		X	X	
Teacher retention		X	X	
Flexible working	X	X		
Remote working	X	X		
Research and development projects	X	X		X
Green jobs	X	X	X	X
Shortage of investment	X	X	X	X
Attainment gap	X	X		
Public transport links	X	X	X	
Digital connectivity	X	X	X	

Summary of career and education strengths, weakness, opportunities and threats in relation to the objectives of Levelling Up

The visitor economy

Visitors are vital to the coastal economy

Strength

- Natural and cultural offer
- Tourism is largest employer in many areas
- Nostalgic appeal to repeat visitors
- Blue wellbeing

Tourists have been drawn to the coast for centuries, and English seaside towns remain a popular destination for holidaymakers; and the pandemic meant many residents rediscovered their love for the coast. Support will be required to maximise opportunities to grow the visitor economy by addressing the challenge of seasonality.

Weakness

- Seasonality
- Low wages
- Reduced investment following covid
- Perceived lack of career progression

One theme which consistently arose during our interview programme was that developing the coast depends on the sustainability of tourism year round. Pre-covid, significant progress was being made to develop products and experiences for the shoulder season and off-peak period. Collaboration between businesses, Destination Management Organisations and local authorities is key to expanding the offer sustainably, ensuring that coastal sites and products are attractive to visitors all year round. Extending the season would allow for more year-round jobs, wage growth and the creation of long-term careers.

Opportunity

- Increase in domestic tourism
- Extending season and bespoke offers
- Turning day visitors into overnight visitors
- Increasing international visitors
- Creation of England Coast Path National Trail
- Ecotourism and sustainable wildlife tourism

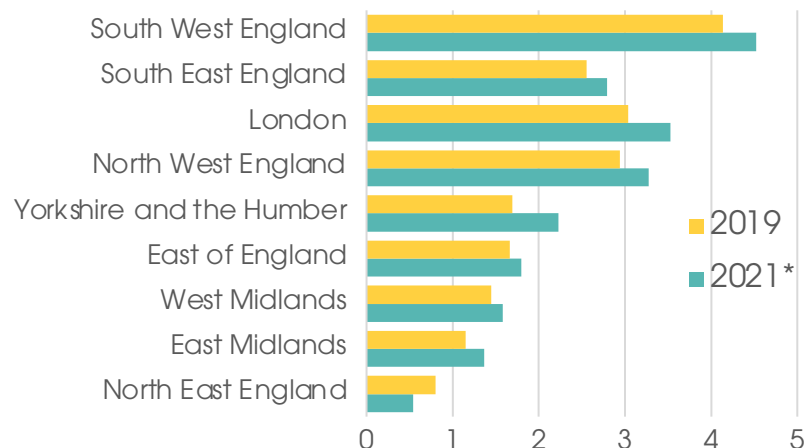
Tourism can occasionally negatively impact the environment if not carefully managed. The rise of domestic tourism during the pandemic saw water-related accidents spike, while the mass exodus of day-trippers to the shore on sunny days resulted in chaotic scenes in some areas. Controlling the flow of footfall and waste management is important for councils to ensure local residents and local biodiversity are prioritised.

Threat

- Unfilled vacancies
- Cost of living crisis
- Poor water quality and pollution

The visitor economy is a major source of income and employment on the coast, contributing £17 billion to the economy pre-covid. To shine a light on the growth opportunities, 2023 has been designated the Year of the Coast. This will showcase events, products and volunteer beach clean ups to attract a new generation of coast-goers. Maximising opportunities such as the new England Coast Path National Trail and converting day visitors to overnight stays provide further opportunities to grow the visitor economy and reduce the impact of visitors on the local environment. The growth in environmental awareness and green values also offer the opportunity for an increase in ecotourism and sustainable wildlife tourism.

Total domestic spend
England, £ billions



Potential to build on pandemic staycations

International border closures and requirements to stay close to home meant an increase in domestic tourism for many areas in 2020 and 2021. Traditional staycationers were reminded of what the country has to offer, while new audiences were introduced to the English coast.

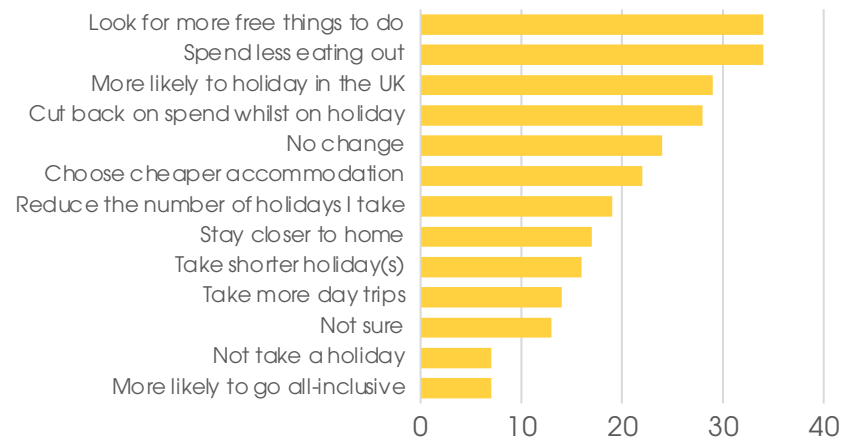
Increased domestic stays, especially in the shoulder season and off-peak months, have the potential to boost spending in coastal communities, providing the opportunity for new and sustained growth in the tourism sector. If just one in ten residents who took an overseas holiday in 2019 opted for a domestic coastal holiday, there would be almost six million additional visitors a year to the coast.

But cost of living crisis could hit domestic spend

Previous economic downturns have traditionally caused an increase in domestic holidays, which could benefit coastal destinations. A recent consumer survey identified a significant opportunity for domestic tourism growth with 80 per cent of visitors surveyed stating they would return to the coast within a year and 88 per cent believed it good value for money. However, the survey indicated consumers may look to cut back on spending on holidays or take more day trips which could change the nature and economic impact of tourism over the next few years.

The cost of living crisis is significantly impacting the cost base and viability of small businesses prevalent in the coastal visitor economy, and the visitor experience could be impacted by the four in ten businesses facing partial closure to reduce their outlays.

Impact of the cost of living crisis on holiday choices
England, November 2022, per cent

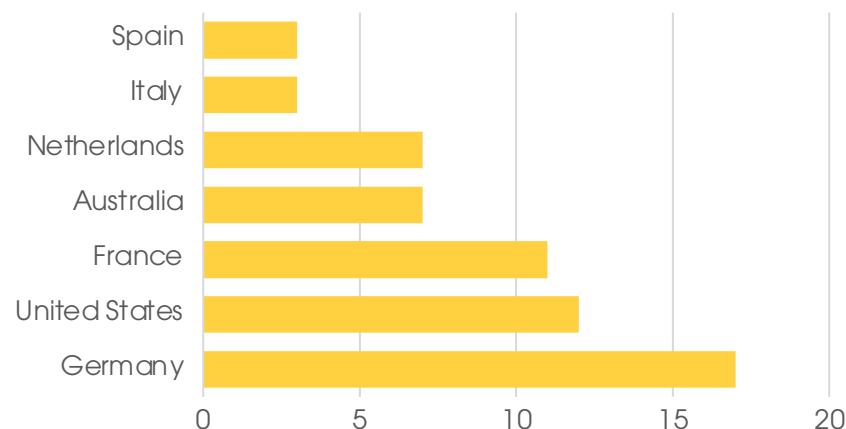


International markets remain largely untapped

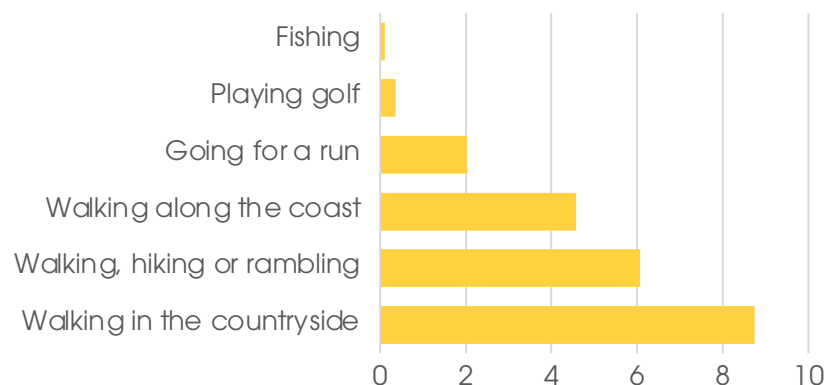
During our interviews, stakeholders identified international visitors as a major opportunity for growth in some coastal areas, along with boosting hotel and overnight stay capacity.

Currently just one in ten international visitors arriving in the United Kingdom visits the coast, with the majority remaining in major cities. The largest international market for coastal areas derives from Germany, with other European countries ranked closely behind. Building on the success of the England's Coast Discover England Fund project, a targeted programme to attract international visitors from Western Europe and long-haul English speaking markets who tend to spend significantly more per visitor, could prove lucrative for coastal destinations.

Share of international visitors to the coast
England, 2016, per cent



Number of inbound visits that involved a selected
outdoor leisure pursuit
United Kingdom, 2019, million

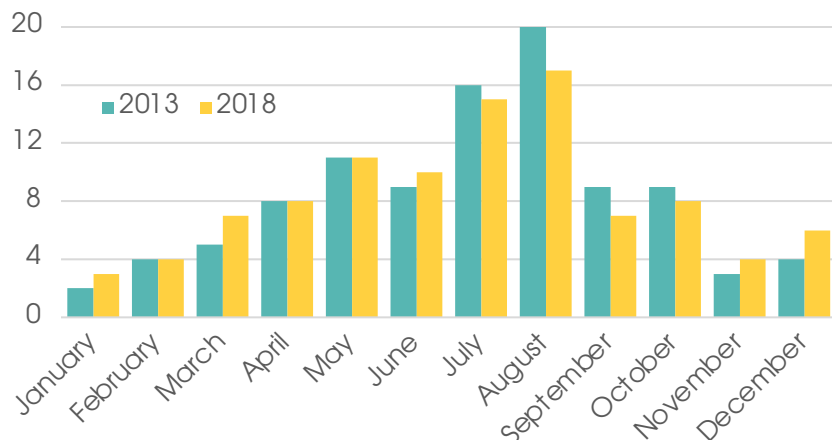


England Coast Path National Trail has global appeal

Inbound countryside and coast research suggest that walking is a major outdoor leisure pursuit. Promoting the England Coast Path could help grow the international tourist market as, when complete, it will be the longest managed coastal path in the world at around 2,700 miles long. It will connect many coastal communities together, from Northumberland to Cornwall.

Though progress slowed due to the pandemic, the government invested in the project to provide economic, environmental and health benefits for coastal communities. Further investment would be beneficial to raise awareness of the path, support businesses in the creation of new products and encourage both visitors and residents to use the trail.

Share of coastal seasonality
England, per cent



Opportunity to extend the tourist season

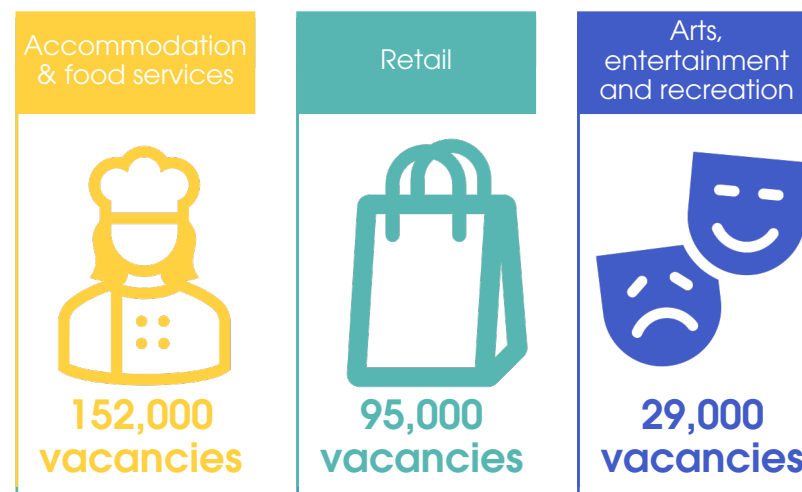
While coastal tourism has traditionally been focused on the summer months, there is evidence to suggest that winter tourism is slowly increasing. Destination Management Organisations working with businesses have developed a range of products, experiences and events to entice visitors year round.

Further investment to capitalise on new consumer trends, bespoke offers and products like the England Coast Path, and more sustainable and accessible experiences would be beneficial for workers, businesses and government alike. Year-round jobs would increase labour force participation, improve business resilience and increase tax revenues for government. Smoothing out the peaks and troughs would also help with capacity struggles, particularly in 'honey pot' destinations.

Challenges attracting workers into the sector

Despite the major contribution it makes to the local and national economy, covid saw many workers leaving tourism jobs to find alternative employment in essential retail. Labour shortages are having a big impact on coastal businesses, with many being forced to operate reduced hours or cut the services on offer, both of which impact turnover. With the added pressures of wage rises and increased costs, margins are being significantly squeezed.

Beyond the cultural shift needed to understand the value of hospitality jobs and the skilled nature of them, an option to help tackle the issue of staff shortages could include an improved seasonal worker visa regime for temporary hospitality workers. Building on the success of projects to support out of work people into employment would also help, as demonstrated in the Coastal Communities Fund project on the Lincolnshire Coast.



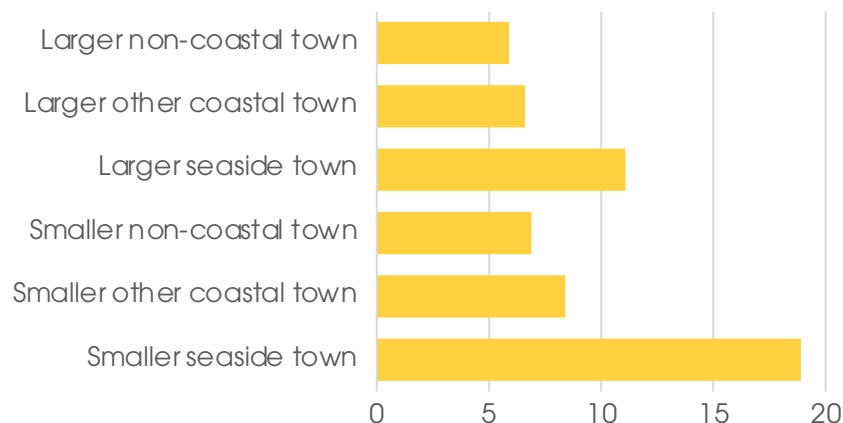
Vacancies by selected industries
United Kingdom, October 2022

Businesses need support to grow their offer

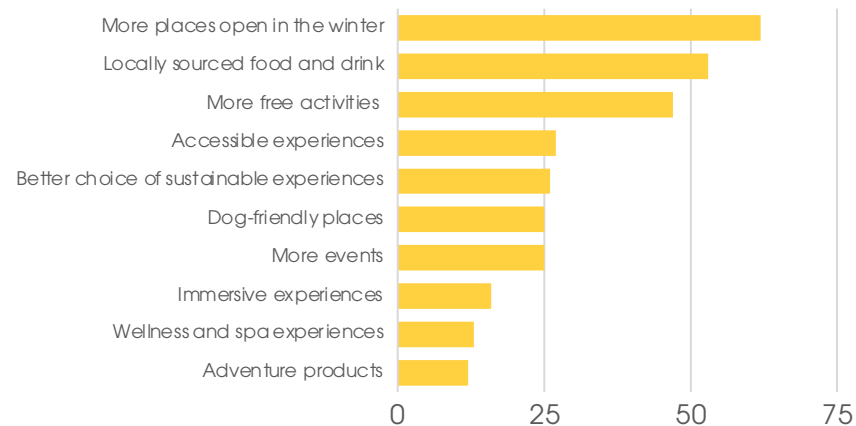
Coastal businesses are more likely than non-coastal businesses to be small and micro enterprises, and the skills and capacity are frequently that of traditional family enterprises. Yet visitor expectations are high, with 62 per cent of people wanting to see more places open in winter. Targeted business support focused on experience and product development to meet changing consumer needs and to understand opportunities for year-round growth by identifying their product-market fit will be essential to sustainable growth.

Additional support to provide early education and careers advice in schools, working with local businesses to understand the range of opportunities in the visitor economy, would also build employability and engagement. Customer service training courses, such as Welcome Host, could be delivered alongside broader businesses strategy skills for a more holistic approach.

Proportion of workers in the accommodation and food services sector by town classification
England and Wales, 2018, per cent



New products or experiences people would like to see available on a coastal holiday
England, November 2022, per cent

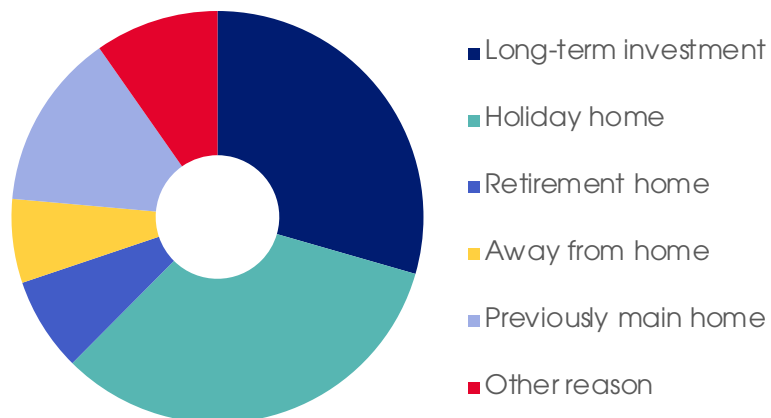


Evolving expectations require a shift to digital

With 83 per cent of all travel bookings now being made online, local businesses will need to continually improve their online presence and keep abreast of digital innovation.

Staffing issues and limited finances are some of the main barriers to tourism digitalisation, with enterprises anxious that the upfront costs of implementing new technology will not be offset by the gains. Mentoring initiatives are a good way to connect tourism businesses in different types of coastal settings. For example, connecting a business in a smaller seaside town with one in a larger seaside town could help ensure efficient utilisation of new technologies and improve human capital.

Reasons for owning a second home
England, 2018-19, per cent



Digital innovation improving beach safety

Blue wellbeing is centred around the benefits of water to health, and it is a strength of many coastal communities. Every year, tourists are drawn to England’s beaches, yet funding beach and water safety is becoming increasingly challenging for coastal stakeholders and local authorities. Swimming, walking and running related activities account for the highest number of accidental coastal fatalities. Reducing deaths and improving resident and visitor awareness of safe opportunities to enjoy the coast is a key focus, particularly during the peak tourist season.

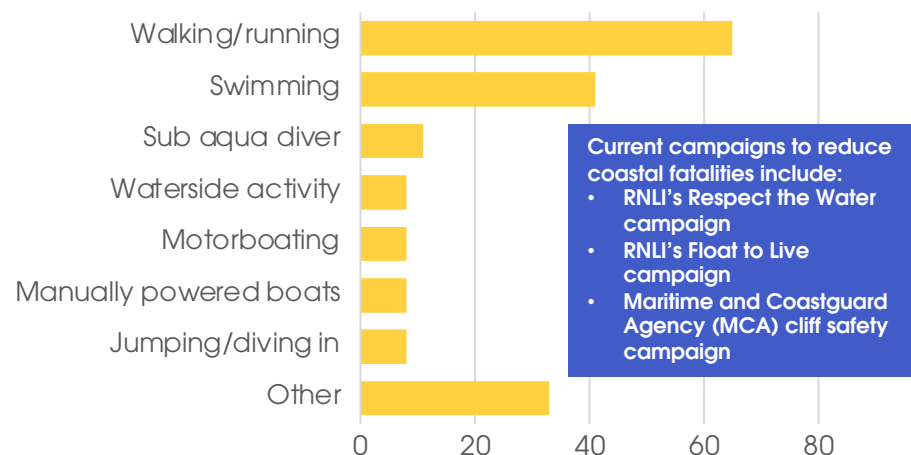
During the pandemic, funding to support summer response and improve visitor management enabled the creation of the Beach Check App. This app alongside multi-agency command centres, enabled local authorities to manage and provide early intervention where medical, police or local authority services come under pressure. Sharing best practice and continued financial support for summer response would help empower local leaders and improve public services.

Balancing act between visitors and local community

Prior to covid, coastal tourism in England supported 210,000 tourism related jobs and generated £13.7 billion of the tourism spend. Yet increased levels of tourism can create pressure on the local housing stock, with second homes aggravating housing affordability and availability. Half a million households have an additional residential property primarily for use as a holiday home in the United Kingdom.

A lack of available housing can lead to workers leaving an area, putting further pressure on an already stretched labour market. There is a fine balancing act between ensuring there is accommodation available for visitors to stay overnight, and making sure there are enough homes for tourism workers, something which local and national housing and planning policy may need to consider more closely.

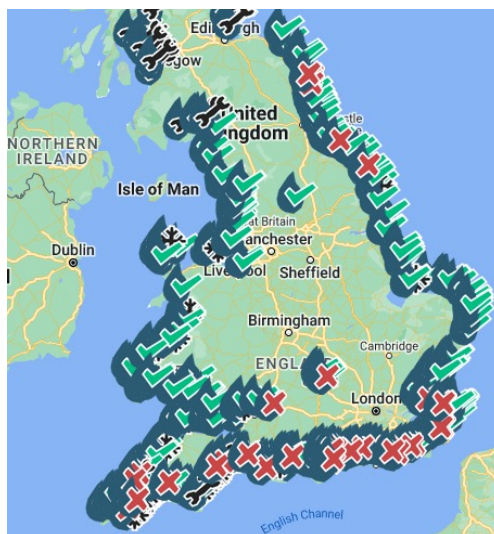
Number of accidental coastal fatalities by activity
England, 2021



Nature tourism needs to be developed responsibly

The natural capital of England’s coastline is one of its major selling points, and ensuring it can be maintained and improved is a priority for many stakeholders. Implementing a national Marine Natural Capital plan would highlight the value of the environment, and nature based tourism offers an opportunity to encourage repeat visits from responsible tourists all year round.

Sharing best practice from projects such as the North Devon biosphere business accreditation scheme can reduce the impact of recreation and tourism activity on the marine environment and support businesses and destinations to develop this opportunity responsibly. Controlling footfall would improve the visitor experience, increasing pride in, connection to and custodianship of the coastal and marine environment.



Water quality of rivers and coastlines
England, 9 January 2023

-  No water quality alerts in place
-  Pollution risk warning in place
-  Water quality data not available out of season
-  Sewer systems in this location are under maintenance and the water company has temporarily disabled real-time alerts

Species group	Recreation and tourism	Displacement indices	
Seaduck	1.33	0.00-0.39	Very low
Diver	1.00	0.40-0.79	Low
Cormorant	1.00	0.80-1.19	Moderate
Grebe	2.00	1.20-1.59	High
Other species	No data	1.60-2.00	Very high

Impact of recreation and tourism activities on seabird species
England, 2018

Storm overflows are hampering growth

Stakeholders we spoke with raised concerns about the impact of poor water quality on visitors to the coast. Sea swimming and water sports are a significant growth market for coastal destinations and the increase in frequency of overflow spills is negatively impacting the economy and health of coastal destinations.

In 2021, overflow spills were released into English waterways more than 370,000 times, for a total duration of over 2.7 million hours. Discharges often cause beach closures, impact the health of those using the water and are detrimental to coastal and marine biodiversity and tourism. Increased engagement between water companies, Destination Management Organisations and the government are improving communications and helping to identify solutions, but further support is needed to respond to the pressures of climate change and increased demands on the infrastructure.

Strengths, weaknesses, opportunities and threats identified	Boosting productivity, pay, jobs and living standards by growing the private sector	Spreading opportunity and improving public services	Restoring a sense of community, local pride and belonging	Empowering local leaders and communities
Natural and cultural offer	X	X	X	X
Tourism is largest employer in many cases	X		X	
Nostalgic appeal to repeat visitors			X	
Blue wellbeing	X	X	X	
Seasonality	X	X		
Low wages	X			
Reduced investment following covid	X	X	X	X
Perceived lack of career progression		X		
Increase in domestic tourism	X		X	
Extending season and bespoke offers	X	X	X	
Turning day visitors into overnight visitors	X	X	X	
Increasing international visitors	X		X	
Creation of England Coast Path National Trail	X	X	X	
Unfilled vacancies		X	X	
Cost of living crisis	X	X		
Poor water quality and pollution	X	X	X	

Summary of tourism strengths, weakness, opportunities and threats in relation to the objectives of Levelling Up

**Policy
recommend-
ations**

Options available to support coastal growth

Levelling up has the potential to help transform communities and increase their contribution to the national economy, but the framework would benefit from slight adjustments.

With the opportunity to boost productivity and jobs, and improve health outcomes, supporting underperforming areas is in the government’s best interests.

The Levelling Up White Paper identifies the need for a long-term evidence-based programme to track the contributing factors driving transformation and growth across the United Kingdom. There needs to be consistency across the evidence, with the data being collected and analysed at local authority district level where possible.

Investing more in physical, human and natural capital along England’s coast would greatly benefit business and residents there, and support them in making the most of current and future opportunities for growth and climate resilience. This would in turn mean coastal communities contributing even more to the United Kingdom economy.

To support...	We recommend that government consider...	For example...
The needs of coastal communities being more accurately reflected in the data and evidence used in the Levelling Up framework	Assessing data as at granular a level as possible and as consistently as possible, tracking performance at a lower layer super output area where possible	Nine of the Mission 1 metrics, including pay and employment, are being assessed at a regional level despite data being available at district level
	Including additional metrics that better identify coastal deprivation and areas requiring additional support	Mental health metrics are not included in the current framework beyond a small-sample survey
	Collecting data across a range of areas at a more granular level, and the creation of a national level coastal-specific lead as a part of Office for National Statistics local statistics	Data on metrics in the framework including research and development funding and public transport trips are currently only available at regional level
	Appointing a dedicated coastal minister	This would ensure proper coastal representation on the Levelling Up Taskforce
Areas of opportunity and growth	Introducing longer-term sustainable funding, and implementation of strategic funding	This would allow projects to be supported across their full lifespan, and for the merging of different streams of funding to achieve an overarching objective
	The creation of a cross-departmental coastal taskforce	Bringing together colleagues from different departments such as DLUHC, DEFRA, Education and Health would provide a holistic approach as challenges within coastal communities are interlinked
	Reviewing the local government funding formula	This would better reflect the need and deprivation within coastal communities
	Improving and restoring natural environments as a key part of coastal economies	Restoration of coastal and inshore marine habitats can increase coastal resilience to flooding, improve water quality, improve health, provide new training, skills and job creation and stimulate the tourism offer all contributing to climate resilience
Identifying and improving environmental data and metrics to combine with socio-economic metrics to accelerate opportunities across the blue/green economy, health and tourism		

With support, coastal can contribute even more

Key areas of growth include...



The green economy



Marine environment and infrastructure



Careers and education



The visitor economy

To support the green economy in coastal communities, we recommend that government consider...

- Providing additional funding and support for the installation of more public electric vehicle charging points
- Developing a compensation route for residents whose homes are at risk due to England's changing coastline, and promoting support packages where demolition of property is needed
- Reviewing the contents of the historic coastal landfills and look to move the high priority landfills further inland before their contents can affect the surrounding water quality
- Providing support to help restore England's degraded coastal and inshore marine habitats, such as saltmarshes with the aim to mitigate carbon emissions
- Reviewing the messaging behind the green transition to encourage more people to switch to eco-friendly lifestyle habits where possible.

To support marine environment and infrastructure in coastal communities, we recommend that government consider...

- Funding more strategic research and development projects
- Improving the marine data and evidence available
- Encouraging the pairing of wind farms with carbon capture technologies to reduce the impacts of climate change and promote collaboration across coastal communities
- Facilitating the co-location of offshore wind farms with marine protected areas and restoration of coastal and inshore marine habitats
- Supporting the introduction of contacts between ports and educational establishments to better develop local understanding of the range of jobs available in the port sector
- Supporting fisheries focus on sustainable fishing practices and products
- Helping balance conflicts between fisheries and renewable energy producers and farm land used for landing cables.

To support careers and education in coastal communities, we recommend that government consider...

- Providing teacher retention data at a local authority level, rather than as a time series
- Supporting the development of packages that incentivise teachers to stay in schools with lower attainment levels on the coast
- Increasing funding for infrastructure connections and alternative transport schemes to reduce the rate of persistently absent students in coastal schools
- Developing a plan to address the coastal housing crisis to help enable young workers to stay in the local community
- Focussing on improving digital connectivity in coastal areas to ease businesses digital operations and the uptake of working from home.
- Incorporating green/blue skills into the curriculum at secondary school level to increase ocean literacy through career pathway creation.

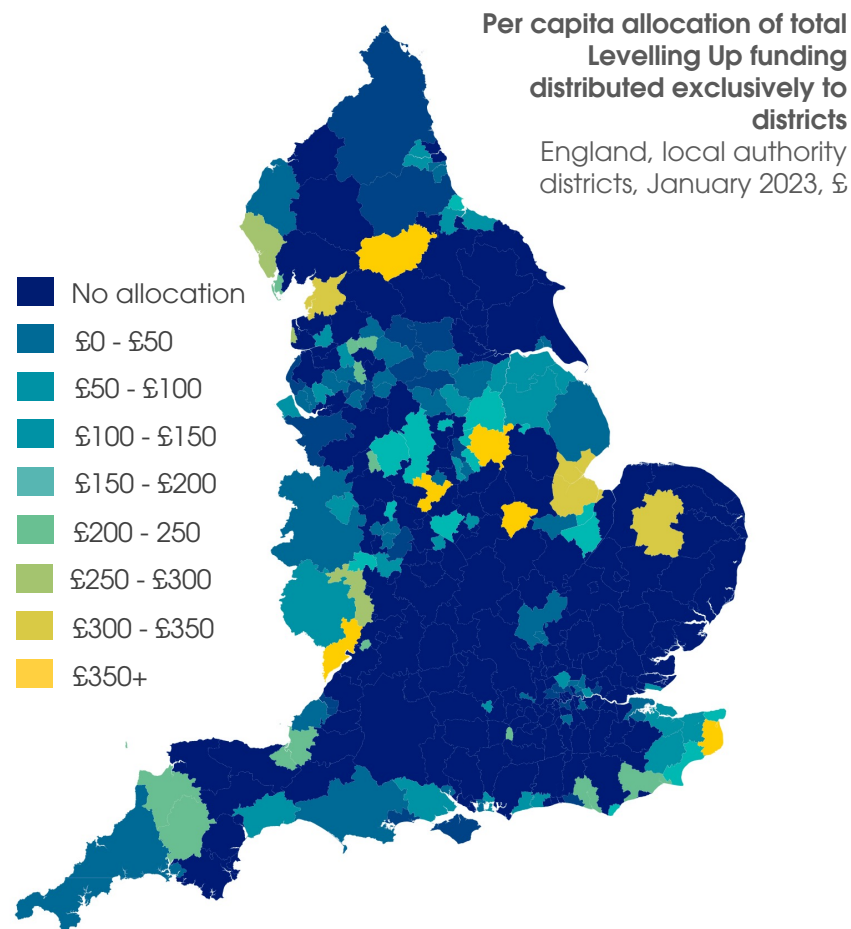
To support the visitor economy in coastal communities, we recommend that government consider...

- Providing additional assistance for Destination Management Organisations and businesses to develop products and experiences to suit the changing consumer needs and extend the seasonality
- Further promoting the England Coast Path National Trail
- Advertising the coastal offer to draw in more international visitors
- Drawing attention to campaigns for beach and water safety such as RNLI's Respect the Water and Float to Live
- Supporting the initiation of business mentorships for small coastal enterprises to share best practice and help with the digital transition
- Improving seasonal worker visa regimes for temporary hospitality workers
- Further researching the impacts of poor water quality and coastal and marine environments on the visitor economy and the potential boost from restoring habitats and protected areas.

Appendix

- Levelling Up Round 2 update
- Classification of districts
- Levelling up metrics

LU Fund overlooking some coastal communities



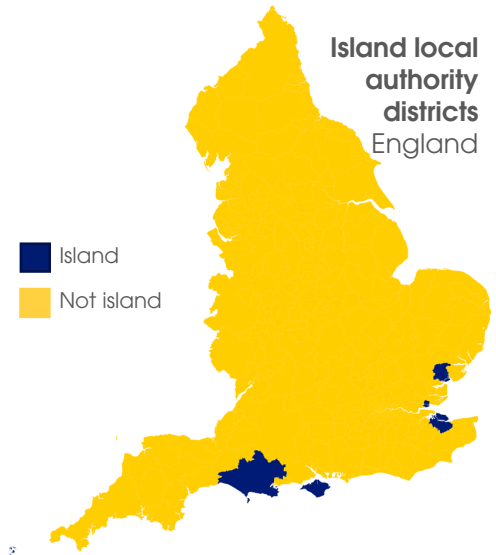
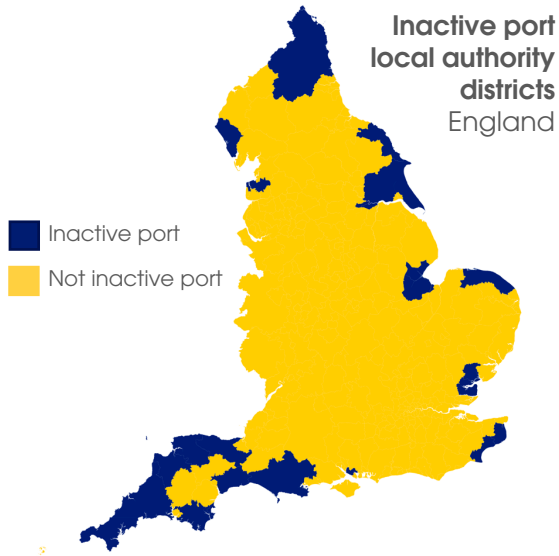
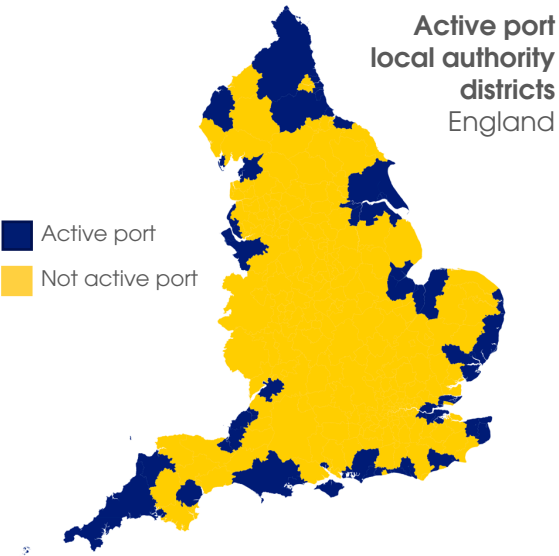
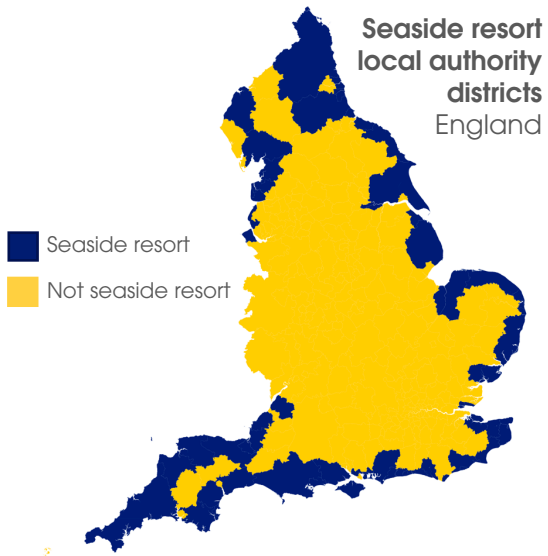
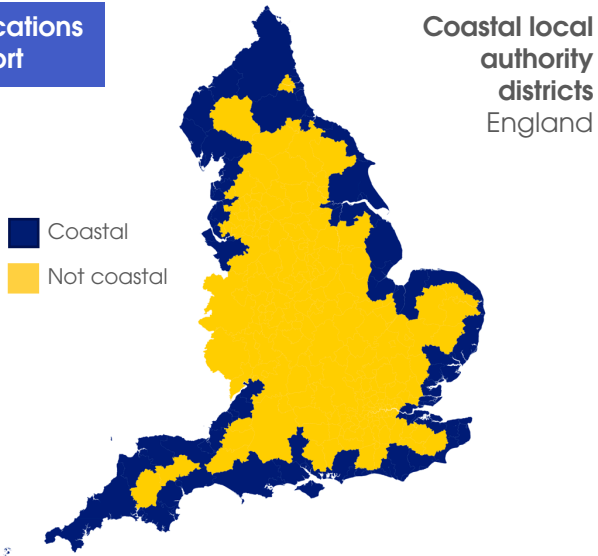
As we finalised our report assessing the need for Levelling Up in England’s coastal communities, details of the successful bidders for the second round of the Levelling Up Fund were released.

A share of £2.1 billion from the second round of funding has been awarded to 111 areas in United Kingdom. We have analysed this new data and collated it with the first round of Levelling up funding in England. The data shows that many areas on the east coast have received no Levelling Up funding, while local authority districts on the south coast have received a middling allocation, although still less than northern inland districts, for example.

Our report recommended a four-stranded approach to funding going beyond just Levelling Up, namely that funding should be to be long-term, sustainable and strategic, with the local government formula adjusted to better reflect pockets of coastal need and deprivation.

In light of the new release from the Department for Levelling Up, Housing and Communities, our recommendations remain. Merging streams of funding to better allow for the facilitation of overarching local government and local business projects will still be beneficial, as would the creation of a cross-departmental coastal taskforce to better represent the opportunities and challenges unique to communities on periphery.

Coastal classifications used in the report



Mission metrics in the Levelling Up White Paper

Mission	Metrics	Proposed geography	Headline metric	Data availability
1	Gross Value Added (GVA) per hour worked	Regions	X	Lower tier
1	Gross median weekly pay (£)	Regions	X	Lower tier
1	Employment rate for 16–64-year olds	Regions	X	Lower tier
1	Gross Disposable Household Income	Regions		Lower tier
1	Proportion of jobs that are low paid	Regions		Lower tier
1	Participation rate	Regions		Lower tier
1	Disability employment rate gap	Regions		Lower tier
1	Proportion of children in workless households	Regions		Lower tier
1	Proportion of employed people in skilled employment (SOC 1-3, 5)	Lower tier		Lower tier
1	Total value of UK exports	Regions		ITL3
1	Inward and outward Foreign Direct Investment (FDI)	Regions		ITL2
2	Business expenditure on R&D	Regions	X	Region
2	Government funding for R&D	Regions	X	Region
2	Percentage of businesses that are innovation active	Regions		ITL2
2	Inward and outward Foreign Direct Investment	Regions		ITL2
3	Usual method of travel to work by region of workplace	Regions	X	Region
3	Average travel time in minutes to reach nearest large employment centre	Lower tier	X	Lower tier
3	Percentage of non-frequent bus services running on time	Lower tier		Upper tier
3	Average excess waiting time for frequent (bus) services	Lower tier		Upper tier
3	Public transport trips as a proportion of total trips per year	Regions		Region
4	Percentage of premises with gigabit-capable broadband	Lower tier	X	LSOA
4	Percentage of 4G (and 5G) coverage by at least one mobile network operator	Lower tier	X	Lower tier
5	Percentage of pupils meeting the expected standard in reading, writing and maths by end of primary school	Lower tier	X	Upper tier
5	Percentage of young people achieving GCSEs in English and maths by age 19	Lower tier		Lower tier
5	Percentage of schools rated good or outstanding by Ofsted	Lower tier		Upper tier

Mission metrics in the Levelling Up White Paper

Mission	Metrics	Proposed geography	Headline metric	Data availability
5	Persistent absences for all pupils and disadvantaged and vulnerable cohorts of children	Lower tier		Lower tier
5	Percentage of 5-year-olds achieving 'expected level' on literacy, communication and maths early learning goals	Lower tier		Upper tier
6	19+ Further Education and Skills Achievements (qualifications) excluding community learning, Multiply and bootcamps	Lower tier	X	Unavailable
6	Number of starts, and achievements, on apprenticeships per 1,000	Lower tier		Lower tier
6	Proportion of the population aged 16 – 64 with level 3+ qualifications	Lower tier		Lower tier
6	19+ further education and skills participation	Lower tier		Lower tier
7	Healthy Life Expectancy	Upper tier	X	Upper tier
7	Smoking prevalence of adults	Lower tier		Lower tier
7	Obesity prevalence - children and adults	Lower tier		X
7	Cancer diagnosis at stage 1 and 2	Various		CCG
7	Under 75 mortality rate from cardiovascular diseases considered preventable	Lower tier		X
8	Average rating of those that feel satisfied about their lives	Lower tier	X	X
8	Average rating of those that feel the things they do in life are worthwhile	Lower tier	X	X
8	Average rating of those that felt happy yesterday	Lower tier	X	X
8	Average rating of those that felt anxious yesterday	Lower tier	X	X
9	Percentage of adults who are satisfied with their local area as a place to live	Regions		Region
9	Percentage of individuals who have engaged in civic participation in the last 12 months	Regions		Region
10	Proportion of non-decent rented homes	Regions	X	Unavailable
10	Number of first-time buyers	Regions	X	Unavailable
10	Recent first-time buyers (last 3 years)	London and England		Unavailable
10	Net additions to the housing stock	Lower tier		X
11	Neighbourhood crime	Police Force Areas	X	PCA
11	Homicide	Police Force Areas	X	PCA
11	Hospital Admissions for Assault with a Sharp Object amongst under-25s	Police Force Areas	X	PCA
12	Percent of the population living in an area covered by the highest level of devolution	Various	X	Unavailable

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