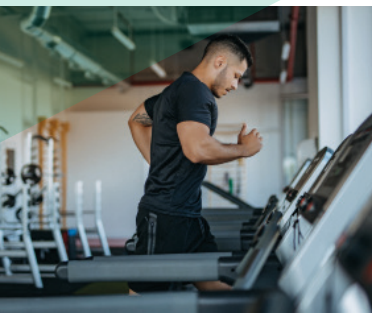


State of the District

Executive Summary

2023



SOUTH
KESTEVEN
DISTRICT
COUNCIL

South Kesteven District Council State of the District Report 2023

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Executive Summary

South Kesteven is a district of potential and promise. Located within the beautiful Lincolnshire countryside, the majority of the 143,400 strong population resides in the four historic market towns of Grantham, Stamford, the Deepings and Bourne. The district boasts enviable connectivity: strategically located alongside the A1 and the East Coast mainline, one can arrive in London Kings Cross within 70 minutes. On the majority of conceivable socio-economic indicators, the district will routinely outperform local, regional and national comparators. Nevertheless, the district faces a number of strategic challenges. The four key long term strategic challenges can be summarised as:

- Economic underperformance relative to neighboring areas over the past decade.
- Persistent pockets of severe deprivation
- An increasingly aged population
- Leading the district in tackling the Climate Emergency

The task of those charged with governance is to ensure that the district's many advantages are fulfilled and that South Kesteven rises to the challenges of the future, so enabling the district to meet its full potential.

The Corporate Plan 2020 – 2023 provides the context for the Council's decision making. It sets out our vision for the district and our priorities for achieving this. The Council's vision of South Kesteven is to 'be the best district in which to live, work and visit'. Working to fulfil this vision is the golden thread that runs throughout all the activities the Council undertakes. All actions take place within the scope of a number of overarching priorities:

- Growth of our Economy
- Housing that Meets the Needs of all Residents
- Healthy and Strong Communities
- A Clean and Sustainable Environment
- High Performing Council

Each priority has actions assigned to it with attendant Key Performance Indicators.

There is the need to take the overall pulse of the district, to monitor progress towards the Council's vision and to assess those efforts in the context of medium to long term trends at the regional and national level. To this end, the multitude of statistics and metrics in this report have been sifted to develop a suite of Strategic Socio-Economic Indicators (SSEI).

The indicators are designed to provide high level reflections of the key dimensions of the society and economy of South Kesteven. These correspond to the areas where the Council wishes to see change and improvement to enhance the material prosperity and mental and physical wellbeing of the residents of the district.

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Population

The 2021 census estimated the population of the district to stand at 143,400 as of 21st March 2021, consisting of 62,850 separate households.¹ Over the decade since the 2011 census, the population increased by 7.2% and is projected to reach 152,458 by 2036.² This rate of growth was slightly lower than the trend for the East Midlands (one of nation's fastest growing regions over the 2010s), but higher than the overall increase for England. Based upon current demographic trends, the ongoing and projected growth is being driven by migration from other parts of the UK³. The majority of the population reside in the four historic market towns of Grantham, Stamford, the Deepings and Bourne. Combined these towns are home to 65% of the district's population.⁴

Residents of South Kesteven have the highest life expectancy of any Lincolnshire local authority and have a slightly higher life expectancy than the regional and national averages at 80.6 years for men and 84.2 for women.⁵

The age profile of the district shows an aging population with a median age of forty-six. This is above the median age for England of forty and is in line with the district's neighbours. 23% of the population is aged 65+, higher than the national proportion of 18.4%. In South Kesteven there are now more residents aged 65+ than residents aged under twenty.⁶ Figure I displays how the population has changed over the past forty years.

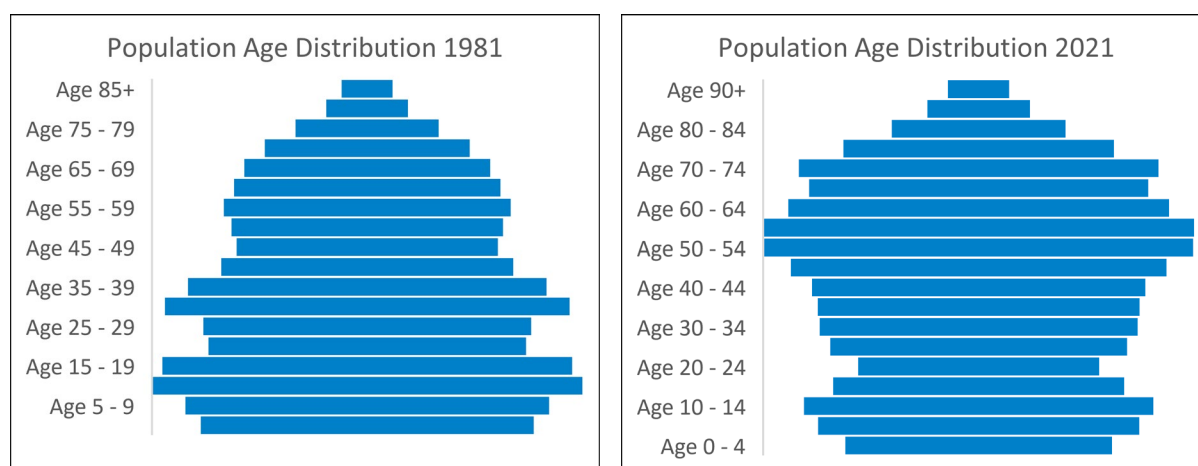


FIGURE I - SOUTH KESTEVEN'S POPULATION PYRAMID 1981 VS 2021, SOURCE: OFFICE FOR NATIONAL STATISTICS

95.8% of residents identify with the high level 'White' category. This is a higher proportion than the 81.7% of population who identify with this category nationwide. The next most common high-level grouping is 'Asian, Asian British or Asian Welsh' comprising as a whole 1.77% of the districts population. 0.61% of the population identifies with 'Black, Black British, Black Welsh of African /or Caribbean background'. 1.35% of the population are 'Mixed or Multiple ethnic groups'. After 'White English, Welsh, Scottish, Northern Irish or British', the largest single ethnic group is the Polish community (1.23% of residents).⁷ Polish is most common language spoken after English in the district (1817 speakers). 2.5% of households do not use English as their main language.⁸ 8.9% of the district's residents were born outside the UK, a significantly lower proportion than the UK wide figure of 16.8% and 5.5% of residents hold a foreign passport.⁹

7.4% of the district's population aged 16+ have previously served in the UK armed forces. Bolstered by the long-established local military presence of the Army and adjacent Royal Air

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Force sites across Lincolnshire, the district hosts a substantially higher population of veterans than the national average.¹⁰

Community Health, Wellbeing & Safety

The Office for National Statistics annually surveys the adult population to gauge feelings of personal wellbeing. Broadly levels of life satisfaction and anxiety in South Kesteven are more positive than the county, regional and national averages. On a national level, personal wellbeing deteriorated across all indicators during 2020/21, before recovering slightly in 2021/22. Feelings of personal wellbeing have yet to return to pre-pandemic levels. South Kesteven followed this trend. The next release will show the impacts of the subsequent economic challenges of 2022 and Cost of Living Crisis.¹¹

The Health Index for England 2020 ranks the district as the second healthiest in Lincolnshire and amongst the top 40% healthiest districts in the England.¹² 10% of all adults aged over 18 smoke, below regional and national rates.¹³ 68.9% of adults aged 18+ are classified as overweight or obese, above the national rate of 66.6%.¹⁴ The percentage of South Kesteven's adults aged 16+ engaging in physical activity has remained largely consistent over the last six years. The percentage of adults who describe themselves as 'active' has hovered around 59.70%, 'fairly active' 13% and 'inactive' 27.31%. Within Lincolnshire, in 2018-19 (the last 'normal' period pre-COVID), South Kesteven was the third most active district in the county. However, the district has trended below national and regional levels in terms of an active adult population.¹⁵

Historically levels of physical activity in South Kesteven for children have been substantially above national, regional, and local levels. In the academic year 2021-22, South Kesteven was the second most active district in Lincolnshire. However, the district has yet to return to previous levels of activity post COVID and now ranks below national and regional rates.¹⁶ In 2019/20, 22.6% of children in Year 6 were classified as obese (including severe obesity). This is a prevalence above national and regional proportions.¹⁷

For the year ending September 2022, South Kesteven was the third safest district in the county with total recorded crime rate (excluding fraud) of 61.16 recorded offences per 1000 residents (Figure II) The recorded crime level in South Kesteven is below the Lincolnshire average in all categories of offence except burglaries and vehicle offences.

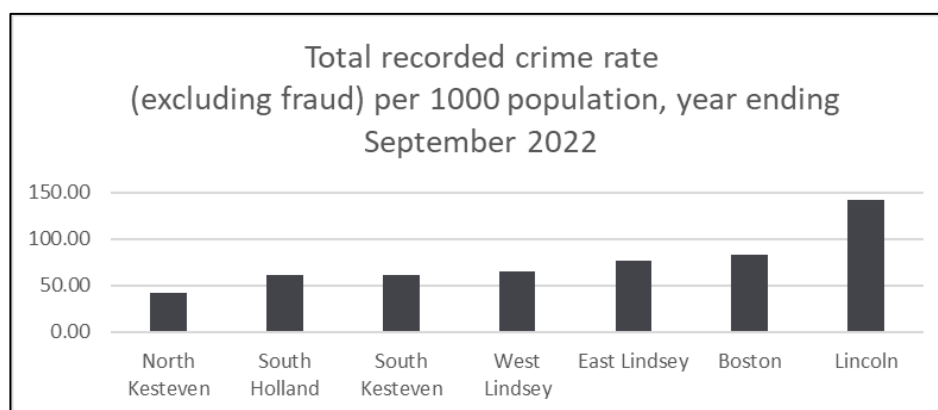


FIGURE II - RECORDED CRIME SOUTH KESTEVEN VS COMPARATORS 2022, SOURCE: LINCOLNSHIRE POLICE

In 2021/22 (year ending September 2022) the total number of offences recorded in South Kesteven rose 14% on the year 2020/21. A similar increase was observed in neighbouring local authorities. This essentially marked a return to the situation pre-pandemic.¹⁸

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The Prevalence and Severity of Deprivation

The Government's standard measure of deprivation and inequality in England is the Indices of Multiple Deprivation (IMD). Last undertaken in 2019, the IMD assesses deprivation across a wide range of domains including income & employment, health, skills, crime, and access to housing & services. The scores for each domain are combined to produce an overall score for the prevalence and the severity of deprivation within an area. These scores are subsequently used to rank local authorities by level of deprivation. There are 317 local authorities in England, the exercise measures deprivation not affluence, therefore 1st in the ranking is the most deprived. The authority ranked 317th is considered to be the least deprived.

IMD 2019, ranked South Kesteven 234th. This was an improvement of eleven places on its 2015 ranking (223rd of 317) and means South Kesteven is the second least deprived district in Lincolnshire. The ranking of 234th places South Kesteven amongst the 40% least deprived districts in England and near the top of this bracket. South Kesteven is nineteen ranks off a placing in the top 20% least deprived districts in England.

The most deprived areas of South Kesteven are found in the Grantham Earlesfield and Harrowby wards. Parts of Grantham Earlesfield are amongst the 10% most deprived areas of England. The least deprived areas in Lincolnshire are located in Stamford St John's ward. The findings of the IMD 2019 mapped are displayed in Figure III.¹⁹

11.6%% of households live in fuel poverty. This proportion is below the county and regional rates of 14% and the national rate of 13%. Rates of fuel poverty can reach as high as 28% in the most deprived areas of the district.²⁰

12.3% of children aged under 16 live in relative low income families, lower than the UK rate of 18.7%. South Kesteven has the second lowest rate of relative child poverty in Lincolnshire.²¹

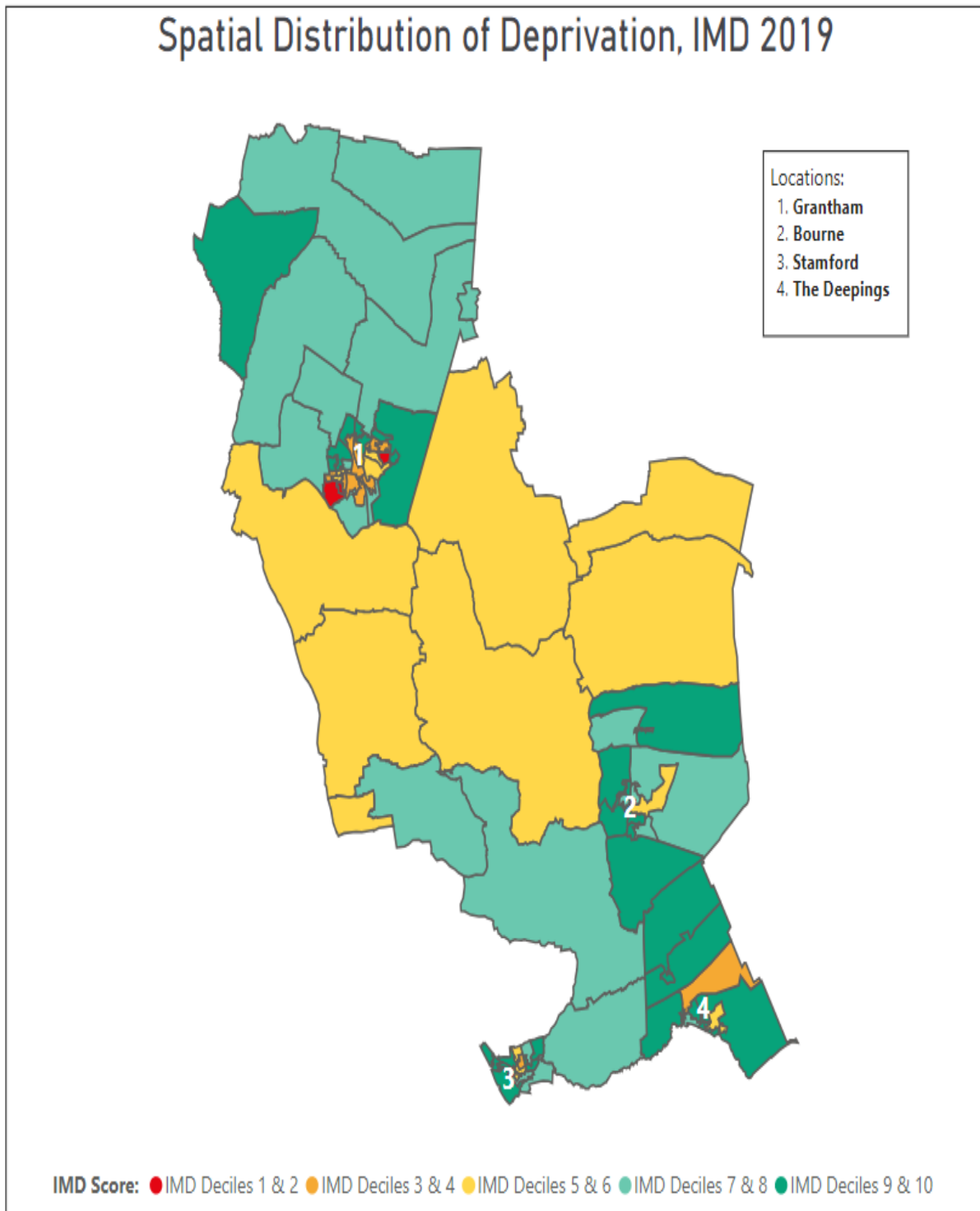


FIGURE III - SPATIAL DISTRIBUTION OF DEPRIVATION, SOURCE: DEPARTMENT FOR LEVELLING UP, HOUSING & COMMUNITIES

The Local Economy

The latest release of the Annual Population Survey estimated that 73.1% of the population aged 16-64 (70,100) are in employment, a proportion slightly lower than regional and national averages. The unemployment rate stands at 2.3%, below regional and national rates.²² 39,031 residents are commuters. 84% of commuters travel less than 30km to work, 40% less than 5km.²³ 75% of commuters drive to work. 13% walk.²⁴

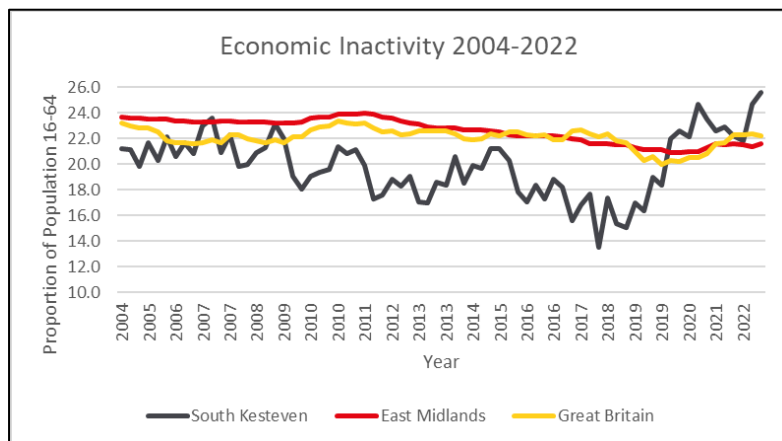


FIGURE IV - ECONOMIC INACTIVITY RATES SOUTH KESTEVEN VS COMPARATORS, SOURCE: NOMIS LABOUR MARKET PROFILE, SOUTH KESTEVEN

There are an estimated 22,400 economically inactive people in the district aged 16-64, 25.6% of that age group, higher than the national rate of 21.6%. Economic inactivity encompasses students, the long-term and short-term sick and disabled, people looking after family and home, discouraged workers and early retirees. 70.5% had not worked in the last twelve months and 18.3% had never worked. 87.8% do not want a job, 36.2% of the economically

inactive population are retirees. With exception of retirees (36.2%), due to issues with sample size, size estimates of the groups that comprise the economically inactive population are not available at the local authority level. Rates of economic inactivity in South Kesteven ran significantly below national trends for the majority of the 2010s, before increasing from 2019 to the current elevated level.²⁵ (Figure IV)

The skills profile of the district is superior to local, regional and national trends. 81.8% of the district's population aged 16-64 possess at least a NVQ2 qualification (equivalent to five good GCSEs). 41.1% possess NVQ4+ qualifications (equivalent to a degree or higher), higher than the county and regional rates, if slightly below national proportions.²⁶

South Kesteven is home to a substantially larger number of businesses than other Lincolnshire authorities. There are 6,265 VAT and/or PAYE registered enterprises in the district (March 2022). The vast majority (87%) of the district's businesses qualify as micro (under ten employees). The largest single business sector, in terms of the number of businesses is Professional, Scientific & Technical services, followed by Construction.²⁷

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The economy of the district is dominated by services, providing two thirds of total employment and a Gross Value Added (GVA, a measure of the output of a local economy) contribution of £1.75 billion. These proportions are line with trends nationwide. Manufacturing provides 11.1% of total employment and £414 million to GVA (16% total GVA 2019).²⁸ Nearly thirteen percent of total employment and 8% of GVA is provided by knowledge intensive services (KIS, includes IT, financial, scientific, technical and professional services). This proportion is slightly higher than the Lincolnshire average, but substantially below national levels (KIS 24% of UK GVA).²⁹ (Table I)

Industry Sector Size by GVA and Employment, South Kesteven 2019-2021 (current prices 2022)						
Sector	GVA contribution, £ million 2019	GVA contribution, £ million 2020	Percentage of Total Employment by Sector 2021			
			South Kesteven	Lincolnshire	East Midlands	Great Britain
Agriculture, forestry and fishing	139	134	1.5 (800)	3.1	0.8	0.7
Mining and quarrying			0.2 (125)	0.1	0.2	0.1
Electricity, gas, steam and air conditioning supply			0.4 (200)	0.2	0.8	0.4
Water supply; sewerage, waste management and remediation activities			1.3 (700)	1.2	0.7	0.7
Manufacturing	414	378	10.9 (6000)	12.2	11.9	7.6
Construction	212	177	4.5 (2500)	4.7	4.7	4.9
Wholesale and retail trade;	471	439	18.2 (10,000)	17.6	16.2	14.4
Transportation and storage	66	58	3.2 (1750)	4.1	6.4	5
Accommodation and food service activities	92	46	7.3 (4000)	7.8	6.5	7.5
Information and communication	71	64	3.2 (1750)	2.0	3.0	4.4
Financial and insurance activities	57	55	1.6 (900)	1.0	1.9	3.6
Real estate activities	125	125	1.8 (1000)	1.4	1.4	1.8
Professional, scientific and technical activities	82	76	7.3 (4000)	4.7	7.0	8.9
Administrative and support service activities	79	49	5.5 (3000)	8.8	8.1	8.9
Public administration and defence; compulsory social security	91	94	1.8 (1000)	3.7	4.0	4.6
Education	190	202	9.1 (5000)	8.1	8.9	8.7
Human health and social work activities	315	401	16.4 (9000)	14.9	13.7	13.6
Arts, entertainment and recreation	23	16	2.3 (1250)	2.0	2.3	2.3
Other service activities	86	46	1.8 (1000)	1.7	1.7	1.9

TABLE I - INDUSTRY SECTOR SIZE BY GVA AND EMPLOYMENT, SOUTH KESTEVEN 2019-2021 (CURRENT PRICES), SOURCE: OFFICE FOR NATIONAL STATISTICS

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South Kesteven’s GVA in 2020 was £2.722 billion, the second highest in Lincolnshire (the production of these statistics has a two year lag). In the period 2010-19 South Kesteven’s GVA grew by an average of 2.43% per annum, this is below the Lincolnshire average of 3.33% per annum over the same period, before contracting 4.69% in 2020.³⁰ (Figure V)

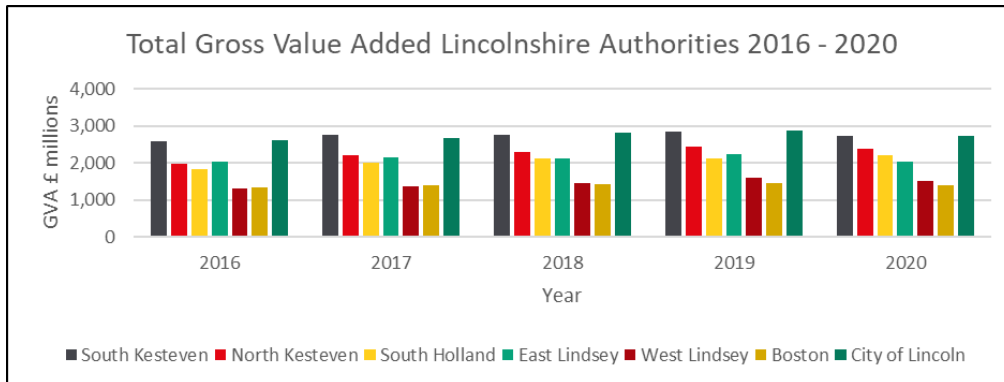


FIGURE V - GVA OF SOUTH KESTEVEN VS COMPARATORS 2016 - 2020, SOURCE: OFFICE FOR NATIONAL STATISTICS

South Kesteven’s productivity was 22.9% lower than the UK average in 2020 and has lagged since 2014. Considered as GVA per job, South Kesteven generated £14,228 less output per role than the national figures.³¹ It should be noted that in 2019 the UK itself was calculated to be 17% less productive than France, Germany and the United States.

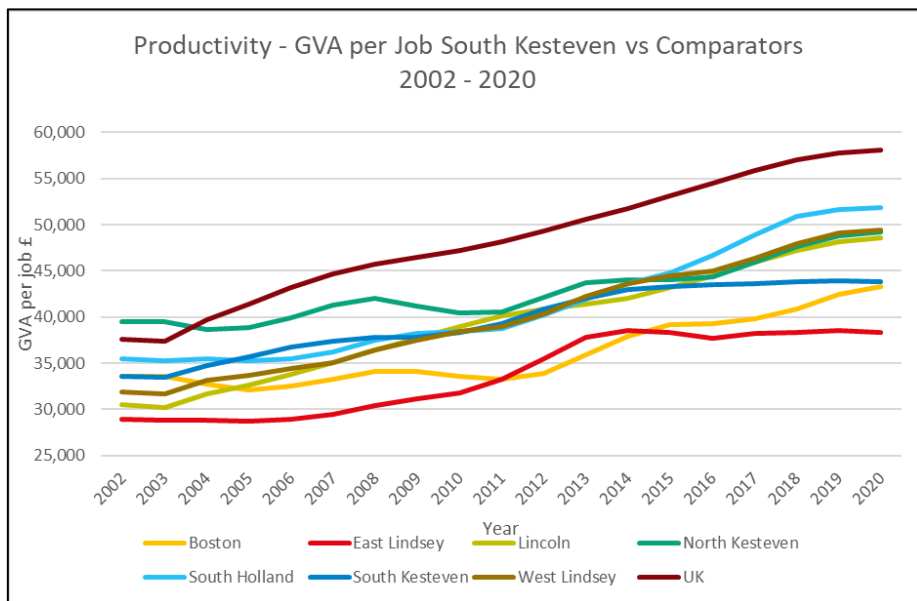


FIGURE VI- GVA PER JOB SOUTH KESTEVEN VS COMPARATORS, SOURCE: OFFICE FOR NATIONAL STATISTICS

Comparatively low productivity to other advanced economies and wide disparities in productivity between regions is a significant national issue and is argued to be a consequence of the UK’s services-oriented economy.³² All seven Lincolnshire authorities have below average productivity, with South Kesteven ranking as the fifth most productive. (Figure VI) A potential explanation is the district’s more advanced transition to a service-oriented economy than other areas within Greater Lincolnshire, marking a decline in high productivity manufacturing & primary industry roles, the growth of relatively low productivity sectors (retail, education and healthcare) as an increasing share of GVA and the small knowledge intensive service sector as a share of GVA.³³

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In 2022, the median weekly gross earnings of full-time workers resident to the district were £632.3, this is above the East Midlands and Lincolnshire equivalents of £603.7 and £599.3 respectively, but below the national median of £642.20. Median weekly gross earnings for full-time workers resident to the district in the lower quartile were £467, again above the median wages for Lincolnshire (£451.10) and East Midlands (£459.30), although lower than the national median of £482.40.

The median annual gross earnings of full-time workers resident to the district was £31,914, above the median across Lincolnshire (£30,514) although lower than the national median of £33,111. Within Lincolnshire, the district has the second highest median annual gross earnings.³⁴

There is a gap between median annual gross earnings between individuals who reside in the district (so including those who work elsewhere) and individuals who work in the district (including non-residents). Individuals residing in the district, but potentially working elsewhere command higher earnings than individuals working in the district. This pattern is replicated at every Lincolnshire district authority with the exception of City of Lincoln.

Split by gender, in 2022 median annual gross earnings for full-time work were £35,038 for men and £24,281 for women, a difference of 36%. The gap had been gradually narrowing since 2015, when median earnings for full-time male workers were 36% higher than female full-time workers, in 2021 the wage gap was 27%. In 2022, the wage gap once again widened, returning to a 36% difference.³⁵

Overall wage growth prior to 2022 had been sluggish, highlighting poor medium term wage growth in the district. Median gross earnings rose by 13% (£3,299) over period 2008 to 2021. Median annual earnings rose in 2022, increasing by £3,503. Despite recent growth in nominal earnings, wages are not keeping pace with inflation and in real terms the median full-time worker had less purchasing power in 2022 than in 2019.³⁶

Gross disposable household income (GDHI) is the amount of money that all of the individuals in a household have available for spending or saving after they have paid all direct and indirect taxes and received any direct benefits. The level of GDHI per head in South Kesteven is £21,467 (current prices). This is very slightly above the UK average. South Kesteven has the highest GDHI per head in Lincolnshire.³⁷ (Figure VII)

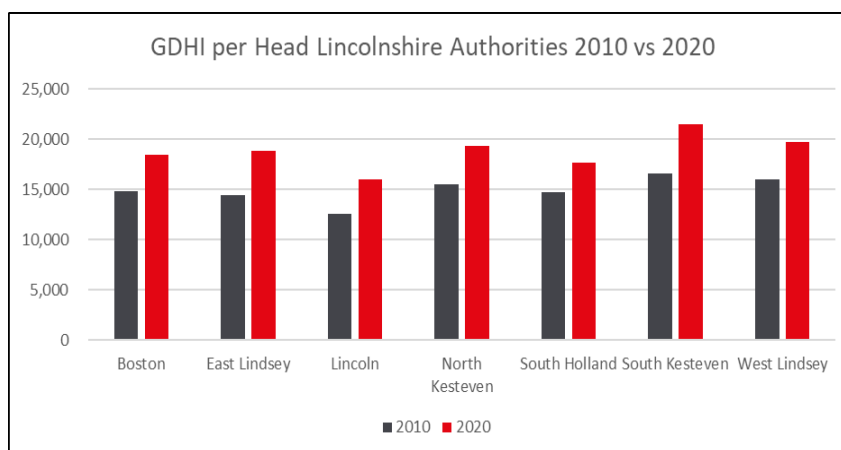


FIGURE VII - GDHI PER HEAD LINCOLNSHIRE AUTHORITIES 2010 VS 2020, SOURCE: OFFICE FOR NATIONAL STATISTICS

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Housing

As of September 2022, there are 66,170 domestic properties in the district registered for Council Tax.³⁸ 43,574 households own or partly own their own home (owns outright 23,765, mortgage or loan 19,155, shared ownership 654). This is 69.33% of all households in the district, substantially above the national proportion of 62.3% and slightly above the Lincolnshire rate of 67.15%. 11,422 households (18.17%) live in private rented accommodation. 7,851 households (12.49%) live in social rented accommodation.³⁹

Rates of home ownership vary across the district and correlates to the rural/urban split and the level of deprivation. There are very low levels of overcrowding. 876 households (1.39%) occupy accommodation with fewer bedrooms than required for their needs. The obverse is a pattern of underoccupancy, 82% of households have more bedrooms than required. This is a level substantially above the national implied underoccupancy rate of 69%.⁴⁰

22% of domestic properties (14,000) are estimated to be not connected to the gas network. This is in line with estimates for the other authorities in Lincolnshire, but higher than the estimates for England (15%) and the East Midlands (11%).⁴¹ 44.14% of domestic properties have an energy efficiency rating of EPC C or higher.⁴²

In 2020/21, 446 net additional dwellings were delivered through planning including 56 affordable homes. 83% of all completions were within the four market towns with 33.2% in Grantham.⁴³ In 2021/22, 485 net additional dwellings were delivered with 116 affordable. South Kesteven had the third highest rate of completions in Lincolnshire over the period 2017-18 to 2021/22.⁴⁴

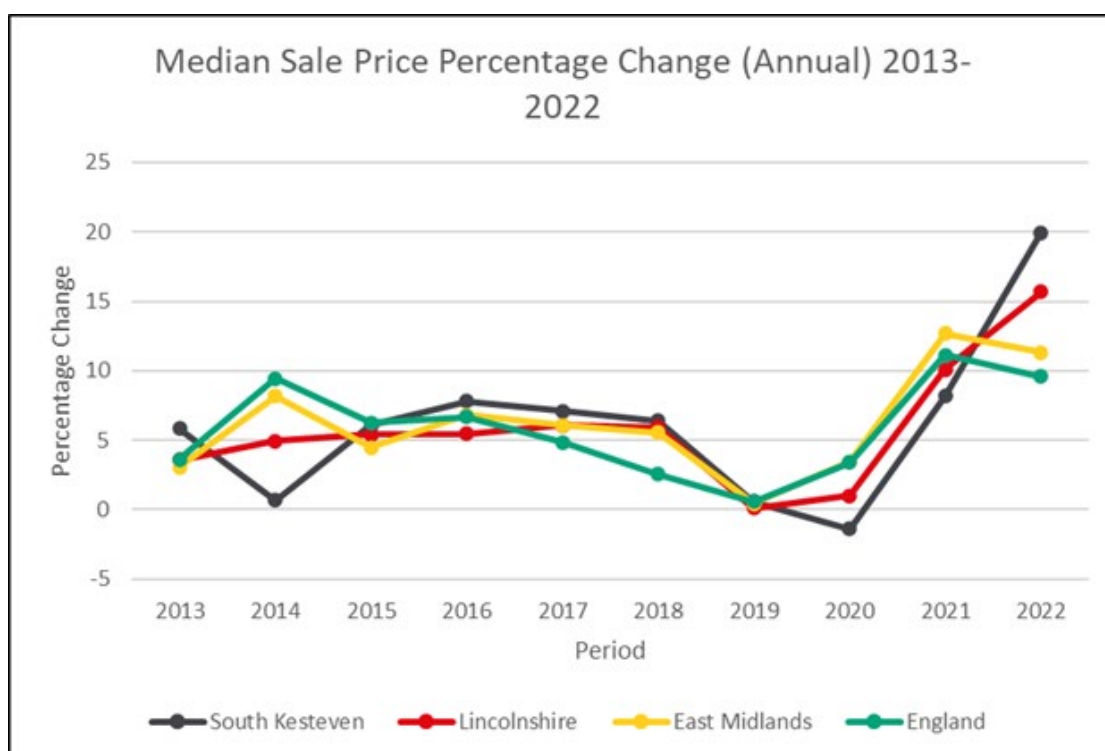


FIGURE VIII - ANNUAL HOUSE PRICE GROWTH, SOUTH KESTEVEN VS COMPARATORS 2013-2022, SOURCE: UK HOUSE PRICE INDEX

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In recent years house prices have risen rapidly in the district. As of September 2022, the median house sale price was £283,613, a year ago the median sale price was £236,249. Whilst remaining below the England median price of £314,278, house prices have risen faster year on year in South Kesteven at 19.96%, than the national average of 9.57%. The wider region of the East Midlands and Lincolnshire have also experienced property booms, however in South Kesteven in median price and price growth have outstripped regional trends.⁴⁵ (Figure VIII)

The rise in house prices has impacted affordability. Over the past decade wage growth has not kept pace with asset price growth. In 2022, the median house price was 8.36 times the median annual gross full-time salary. A worse affordability ratio than the rest of Lincolnshire, the East Midlands and the national average. Despite house prices remaining lower than the national average, rapid asset growth, coupled with sluggish medium term earnings growth has left the district with a growing issue of housing affordability.⁴⁶

The Environment

The district's total territorial CO₂e emissions in 2020 were 948kt CO₂e. This equates to 6.6 tonnes per capita. South Kesteven's emissions per capita are above the East Midlands and England average. South Kesteven's emissions are lower than its Lincolnshire peers.⁴⁷

The relationship between economic output and emissions can be explored through the metric of emissions intensity. A reduction of emissions intensity may indicate a transition towards a greener and more sustainable economy. In 2020, the district's emissions intensity was 0.35 thousand tonnes of carbon per £ million of GVA. The intensity was the fourth highest in Lincolnshire and substantially higher than the national average of 0.15 thousand tonnes of carbon per £ million of GVA.⁴⁸ (Figure IX)

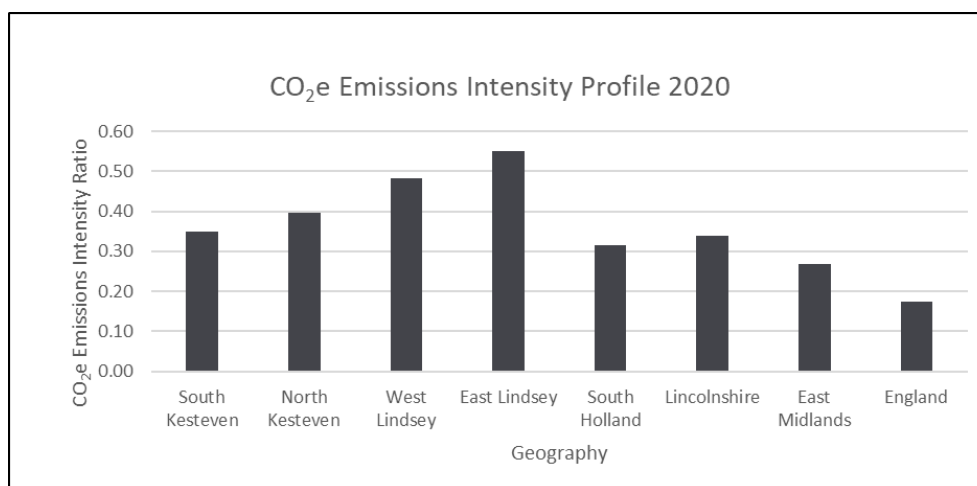


FIGURE IX - CO₂E EMISSIONS INTENSITY 2020, SOUTH KESTEVEN VS COMPARATORS, SOURCE: OFFICE FOR NATIONAL STATISTICS AND DEPARTMENT FOR BUSINESS, ENERGY & INDUSTRIAL STRATEGY

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