

The Local Economy of Uttlesford

Developing an evidence base to inform the new
Local Plan

Section B: Socio-Economic Baseline – DRAFT

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1. Introduction

Aim

- 1.1** This Working Paper seeks to understand the current socio-economic situation in Uttlesford District. To achieve this aim, it reviews publicly accessible data from a variety of sources to assess the District's performance on a number of key metrics relating to demography, labour market and enterprise. For each metric, this section presents the most recent data (in the majority of cases this is 2019) and, where the data are available, analyses trends over the last 10 years.
- 1.2** The data sources used in this baseline include:
- Business Register and Employment Survey (2019)
 - Census (2011)
 - English Indices of Deprivation (2019)
 - ONS Annual Population Survey (2020)
 - ONS Annual Survey of Hours and Earnings (ASHE) (2020)
 - ONS Business Demography (2019)
 - ONS Jobs Density (2019)
 - ONS Mid-Year Population Estimates (2019) and Projections (2018)
 - UK Business Counts (2020)
- 1.3** Whilst the focus is on Uttlesford, comparator areas are used to assess the District's *relative* performance across the key metrics. The comparator areas include the Local Authority Districts (LADs) which abut Uttlesford (namely Braintree, Chelmsford, East Hertfordshire, South Cambridgeshire), as well as county (Essex), regional (East of England) and national comparators (England).
- 1.4** This Working Paper begins with an analysis of key demographic data. This is followed by analysis of data relating to the labour market, commuting flows and earnings, and enterprise. The Working Paper closes with a series of conclusions.

2. Demography

Population Estimates

- 2.1** The population of Uttlesford in 2019 was just over 91,000 (Table 2-1). Between 2010 and 2015, the average annual growth in the population was 1.6% per annum. This was higher than the growth recorded in the neighbouring LADs and the county, regional and national comparators. Notably, the annual growth rate in Uttlesford was double that observed across both Essex and England (0.8% pa over this period).
- 2.2** Between 2015 and 2019, the average annual growth rate in Uttlesford was slightly higher at 1.7% per annum. Again, this was substantially higher than the growth observed across the comparator areas for the same time period.

Table 2-1: Total Population 2019 and Compound Annual Growth Rates (CAGR) (%) 2010-2015 and 2015-2019

| | 2019 | 2010-2015 | 2015-2019 |
|----------------------|------------|-----------|-----------|
| Uttlesford | 91,284 | 1.6 | 1.7 |
| Braintree | 152,604 | 0.6 | 0.3 |
| Chelmsford | 178,388 | 0.6 | 0.8 |
| East Hertfordshire | 149,748 | 1.1 | 0.9 |
| South Cambridgeshire | 159,086 | 0.9 | 0.7 |
| Essex | 1,489,189 | 0.8 | 0.8 |
| East of England | 6,236,072 | 0.9 | 0.7 |
| England | 56,286,961 | 0.8 | 0.7 |

Source: SQW analysis of ONS Mid-Year Population Estimates (2019)

2.3 Table 2-2).

2.4 In comparison to the neighbouring LADs, Uttlesford had the second largest 0-15 population behind South Cambridgeshire (20.1%), the third largest working age population behind East Hertfordshire (62.1%) and Chelmsford (61.6%), and the second largest 65+ population behind Braintree (20.4%).

2.5 In comparison to the average for England, Uttlesford had a relatively large 0-15 population and 65+ population, and a relatively small working age population.

Table 2-2: Population Age Structure 2019 (% of Total Population)

| | 0-15 | 16-64 | 65+ |
|----------------------|------|-------|------|
| Uttlesford | 19.9 | 60.5 | 19.6 |
| Braintree | 19.2 | 60.4 | 20.4 |
| Chelmsford | 19.1 | 61.6 | 19.2 |
| East Hertfordshire | 19.7 | 62.1 | 18.1 |
| South Cambridgeshire | 20.1 | 60.3 | 19.6 |
| Essex | 19.0 | 60.4 | 20.7 |
| East of England | 19.4 | 60.7 | 19.9 |
| England | 19.2 | 62.4 | 18.4 |

Source: SQW Analysis of ONS Mid-Year Population Estimates (2019)

- 2.6** Between 2010 and 2019, Uttlesford recorded the fastest rate of population growth of the comparator areas across all three age groups (Table 2-3).
- 2.7** The greatest growth rate was recorded for the 65+ population between 2010 and 2015 (4.2%). From 2015 to 2019, the rate of growth in this age group slowed slightly, however it remained notably higher than the growth rates recorded for the neighbouring LADs and the county, regional and national comparators.

Table 2-3: Population Age Structure, CAGR (%) 2010-2019

| | 0-15 | | 16-64 | | 65+ | |
|----------------------|-----------|-----------|-----------|-----------|-----------|-----------|
| | 2010-2015 | 2015-2019 | 2010-2015 | 2015-2019 | 2010-2015 | 2015-2019 |
| Uttlesford | 1.3 | 1.7 | 1.0 | 1.5 | 4.2 | 2.5 |
| Braintree | 0.2 | 0.3 | -0.1 | -0.2 | 3.8 | 2.0 |
| Chelmsford | 0.7 | 1.4 | -0.2 | 0.4 | 3.4 | 1.4 |
| East Hertfordshire | 0.8 | 0.9 | 0.5 | 0.5 | 3.5 | 2.2 |
| South Cambridgeshire | 0.9 | 1.1 | 0.1 | 0.2 | 3.7 | 1.9 |
| Essex | 0.6 | 1.3 | 0.2 | 0.4 | 3.0 | 1.3 |
| East of England | 1.0 | 1.2 | 0.3 | 0.2 | 2.9 | 1.6 |
| England | 0.9 | 1.0 | 0.3 | 0.3 | 2.5 | 1.6 |

Source: SQW Analysis of ONS Mid-Year Population Estimates (2019)

- 2.8** Dependency ratios are calculated by dividing the size of the dependent population (those not typically in the labour force, namely those aged 0-15 and 65+) by the size of the working age population (16-64). Higher values indicate a greater the level of dependency.

2.9 In 2019, Uttlesford recorded a dependency ratio of 65.3 (Table 2-4). The dependency ratios recorded for the neighbouring LADs were very similar.

2.10 Looking across the county, regional and national comparators, Uttlesford had a relatively lower level of dependency in its population compared to Essex, but a relatively higher level of dependency compared to the East of England and England.

Table 2-4: Dependency Ratios, 2019

| | 2019 |
|----------------------|------|
| Uttlesford | 65.3 |
| Braintree | 65.5 |
| Chelmsford | 62.2 |
| East Hertfordshire | 61.0 |
| South Cambridgeshire | 65.9 |
| Essex | 65.6 |
| East of England | 64.7 |
| England | 60.3 |

Source: SQW Analysis of ONS Mid-Year Population Estimates (2019)

Population Projections

2.11 Between 2019 and 2039, the population of Uttlesford is expected to increase by just over 16,000 people, resulting in a projected growth rate of 0.8% per annum across the 20 year period (Table 2-5). This growth rate exceeds the rates projected for the neighbouring LADs and is double the rate projected for the East of England and England (0.4%).

Table 2-5: Population Projections: Total Population and CAGR (%) 2019-2039

| | 2019 | 2024 | 2029 | 2034 | 2039 | % |
|----------------------|------------|------------|------------|------------|------------|-----|
| Uttlesford | 90,417 | 95,854 | 100,186 | 103,586 | 106,428 | 0.8 |
| Braintree | 151,970 | 154,094 | 155,866 | 157,773 | 160,047 | 0.3 |
| Chelmsford | 178,712 | 185,792 | 191,318 | 196,086 | 200,513 | 0.6 |
| East Hertfordshire | 148,910 | 153,152 | 156,128 | 158,516 | 160,875 | 0.4 |
| South Cambridgeshire | 158,395 | 161,672 | 162,978 | 163,614 | 164,431 | 0.2 |
| Essex | 1,488,292 | 1,534,709 | 1,573,455 | 1,607,700 | 1,640,640 | 0.5 |
| East of England | 6,240,418 | 6,408,246 | 6,535,934 | 6,644,617 | 6,750,247 | 0.4 |
| England | 56,343,075 | 57,816,882 | 58,969,497 | 59,988,994 | 60,961,810 | 0.4 |

Source: ONS Population Projections by Local Authority and Year (2018)

2.12 The projected population growth in Uttlesford is expected to be driven primarily by growth in the 65+ age group. The size of this age group is projected to grow at a rate of 2.2% per annum across the 20 year period (Table 2-6). A similar trend is expected to be observed across the comparator areas, although not as pronounced.

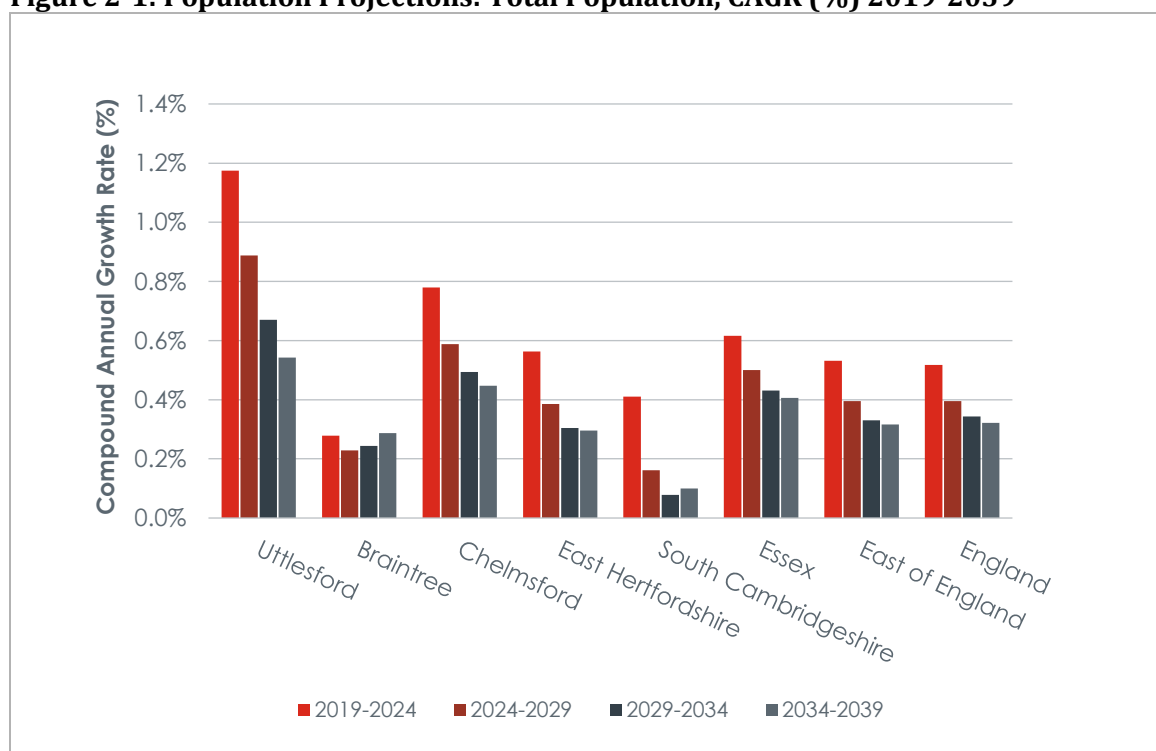
Table 2-6: Population Projections by Age Group, CAGR (%) 2019-2039

| | 0-15 | 16-64 | 65+ | Overall |
|----------------------|------|-------|-----|---------|
| Uttlesford | 0.3 | 0.4 | 2.2 | 0.8 |
| Braintree | -0.4 | -0.1 | 1.6 | 0.3 |
| Chelmsford | 0.2 | 0.4 | 1.5 | 0.6 |
| East Hertfordshire | -0.3 | 0.0 | 2.1 | 0.4 |
| South Cambridgeshire | -0.5 | -0.1 | 1.5 | 0.2 |
| Essex | 0.1 | 0.2 | 1.5 | 0.5 |
| East of England | -0.2 | 0.1 | 1.6 | 0.4 |
| England | -0.2 | 0.1 | 1.7 | 0.4 |

Source: SQW Analysis of ONS Population Projections by Local Authority and Year (2018)

2.13 Breaking down the projected population growth into five-year periods reveals that the rate of growth in Uttlesford is expected to slow between 2019 and 2039 from just shy of 1.2% per annum (2019-2024) to 0.5% per annum (2034-2039) (Figure 2-1). In every time period however Uttlesford's growth rate is projected to be faster than the comparator areas.

Figure 2-1: Population Projections: Total Population, CAGR (%) 2019-2039



Source: SQW Analysis of ONS Population Projections by Local Authority and Year (2018)

3. Labour Market

Skills

- 3.1** In the 12 months to December 2020, 38.4% of the working age population in Uttlesford had an NVQ Level 4+ qualification (Table 3-1). With the exception of South Cambridgeshire which recorded a substantially higher percentage (56.2%) this was similar to the neighbouring LADs. With regards to the county, regional and national comparators, the percentage of the working age population with NVQ Level 4 + qualification in Uttlesford was higher than the average for Essex (35.3%) but lower the average for the East of England (39.2%) and England (42.8%).
- 3.2** On the other end of the spectrum, namely the percentage of the working age population with no qualifications, Uttlesford recorded a percentage of 4.5%. This was higher than what was recorded for South Cambridgeshire and Chelmsford (2.9% and 4.3% respectively), but lower than Braintree (6.9%) and the county, regional and national average. Data for East Hertfordshire was missing.

Table 3-1: Qualification of Residents Aged 16-64 in 2020 (12 Months to December)

| | % with NVQ4+ | % with NVQ3+ | % with NVQ2+ | % with NVQ1+ | % with other quals | % with no quals |
|----------------------|--------------|--------------|--------------|--------------|--------------------|-----------------|
| Uttlesford | 38.4 | 60.2 | 77.7 | 88.9 | 6.5 | 4.5 |
| Braintree | 34 | 60 | 79.9 | 90 | 3 | 6.9 |
| Chelmsford | 37.9 | 61.8 | 84.2 | 91.1 | 4.6 | 4.3 |
| East Hertfordshire | 41.3 | 62.3 | 79.8 | 95.3 | 3.5 | ! |
| South Cambridgeshire | 56.2 | 73.4 | 88 | 94.6 | 2.5 | 2.9 |
| Essex | 35.3 | 55.5 | 76.3 | 89.5 | 5.4 | 5.1 |
| East of England | 39.2 | 57.6 | 76.9 | 88.8 | 5.6 | 5.7 |
| England | 42.8 | 61.3 | 78.2 | 88.2 | 5.7 | 6.2 |

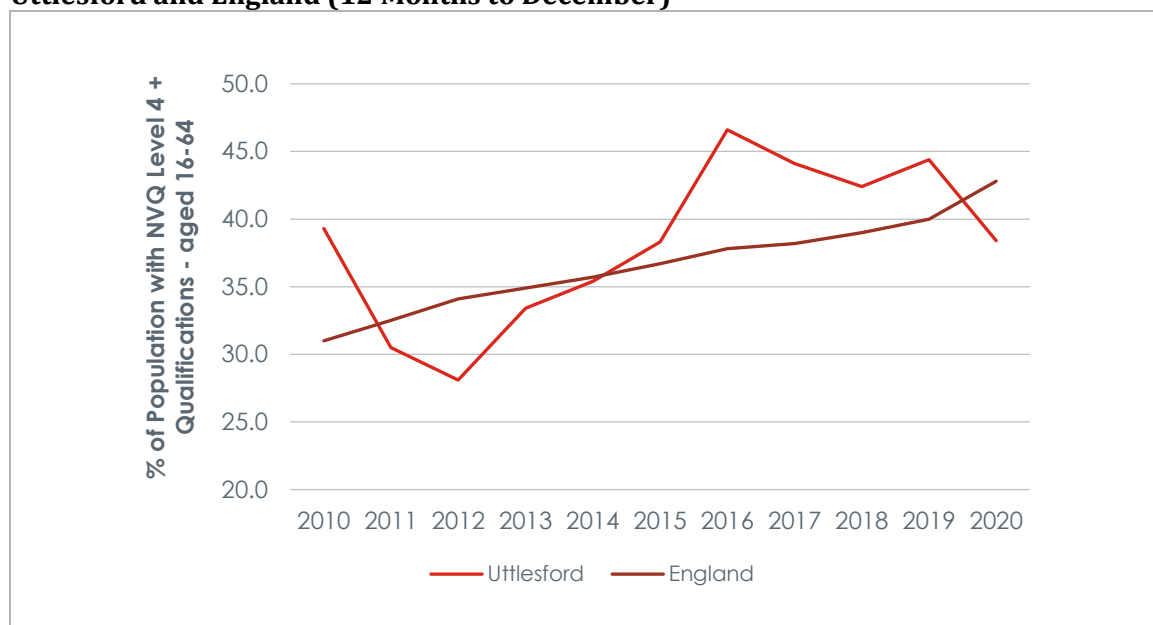
Source: ONS Annual Population Survey (2020)

! Estimate and confidence interval not available since the group sample size is zero or disclosive (0-2).

- 3.3** Between 2010 and 2020, the percentage of working aged residents in Uttlesford with a NVQ Level 4 + qualification fell by 0.9 percentage points from 39.3% to 38.4%. East Hertfordshire also saw a fall in the percentage of the working age population with a NVQ Level 4+ qualification, from 43.2% to 41.3%. With the exception of Chelmsford, the remaining comparator areas (including the county, regional and national comparators) all recorded increases in the percentage of their populations with NVQ Level 4+ qualifications between 2010 and 2020 of over 10 percentage points.

- 3.4** An analysis of trend data points to significant volatility in the data for Uttlesford. Overall, the inference is that the qualifications profile is similar to the England average on this measure (Figure 3-1).

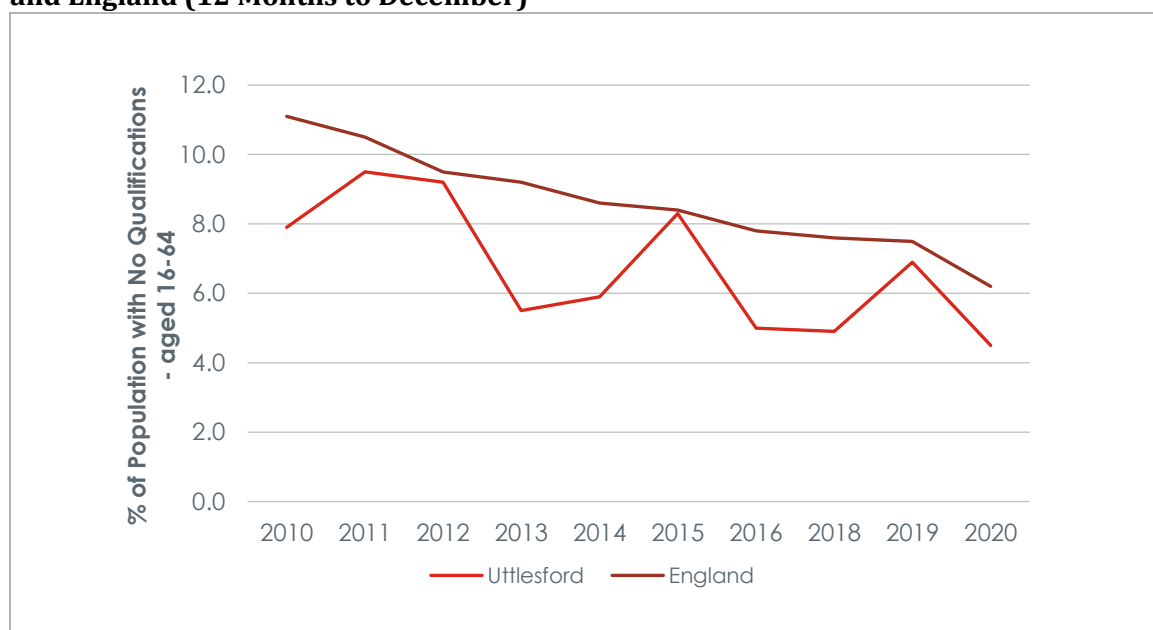
Figure 3-1: % of Population Aged 16-64 with NVQ Level 4 + Qualification, 2010-2020, Uttlesford and England (12 Months to December)



Source: SQW Analysis of ONS Annual Population Survey Data (2020)

- 3.5** On the other end of the spectrum, the percentage of the working age population in Uttlesford with no qualifications fell by 3.4 percentage points from 7.9% to 4.5% between 2010 and 2020. All of the comparator areas recorded falls in the percentage of the working age population with no qualifications over this period, although the decline was more pronounced in some areas than others, for example Braintree recorded a fall of 5.5 percentage points between 2010 and 2020, whilst the average across Essex was 6 percentage points.
- 3.6** Analysis of trend data reveals that the percentage of the working age population in Uttlesford with no qualifications fluctuated year on year which could be due to a small sample size. However, the percentage of the working age population with no qualifications in Uttlesford was consistently lower than the national average between 2010 and 2020 (Figure 3-2).

Figure 3-2: % of Population Aged 16-64 with No Qualifications, 2010-2020, Uttlesford and England (12 Months to December)



Source: SQW Analysis of ONS Annual Population Survey Data (2020)

Occupations

- 3.7** In 2020, 19.6% of working age residents in Uttlesford were employed as Managers, Directors and Senior Officials; this was notably higher than in the neighbouring LADs and across the county, regional and national comparators (Table 3-2). The percentage of working age residents employed in Skilled Trades Occupations in Uttlesford (18.9%) was much higher than elsewhere. The percentage of working age residents employed in Professional Occupations (21.3%) was close to the national average; it was higher than in most adjacent areas but noticeably lower than in South Cambridgeshire (37.3%).
- 3.8** Occupations that appear to be thinly represented in Uttlesford include administrative and secretarial; process, plant and machine operatives; and elementary occupations. These occupations are typically associated with major employers and/or production activities.

Table 3-2: Percentage in Employment by Standard Occupation Classification, 2020 (%) (12 Months to December)

| | Managers, directors & senior officials | Professional occupations | Associate professional & technical occupations | Administrative & secretarial occupations | Skilled trades occupations | Caring, leisure & other service occupations | Sales & customer service occupations | Process, plant & machine operatives | Elementary occupations |
|----------------------|--|--------------------------|--|--|----------------------------|---|--------------------------------------|-------------------------------------|------------------------|
| Uttlesford | 19.6 | 21.3 | 14.8 | 4.9 | 18.9 | 6.9 | 6 | 3.2 | 4.4 |
| Braintree | 16.8 | 8.9 | 20.1 | 10.7 | 9.5 | 8.4 | 9.5 | 6.5 | 9.6 |
| Chelmsford | 17.7 | 19.2 | 20.4 | 7.9 | 7.1 | 13.2 | 6.3 | 3.1 | 4.5 |
| East Hertfordshire | 15.6 | 18 | 22.7 | 13.3 | 9.7 | 5.3 | 4.5 | 3.7 | 7.2 |
| South Cambridgeshire | 11.1 | 37.3 | 12.9 | 7.4 | 10.1 | 8.1 | 3.3 | 2.5 | 7.2 |
| Essex | 13.6 | 17.5 | 16.4 | 12.2 | 10.5 | 10.4 | 6.4 | 4.6 | 8 |
| East of England | 12.9 | 20.7 | 15.4 | 10.9 | 10.1 | 8.9 | 6.6 | 5.2 | 9.3 |
| England | 11.8 | 22.9 | 15.9 | 10.1 | 9.1 | 8.7 | 6.7 | 5.4 | 9.2 |

Source: ONS Annual Population Survey

3.9 Between 2010 and 2020, the percentage of working age residents employed as Managers, Directors and Senior Officials in Uttlesford increased by 10.6 percentage points, from 9% in 2010 to 19.6% in 2020. The percentage of working age residents employed in Skilled Trades Occupations also increased by over 10 percentage points, from 8.4% in 2010 to 18.9% in 2020. Conversely, the percentage of working age residents employed in Professional Occupations in Uttlesford fell by 6.2 percentage points over the 10 year period, from 27.5% in 2010 to 21.3% in 2020.

Jobs

3.10 In 2019, there were 56,000 jobs in Uttlesford. There was a jobs density of 1.01, meaning that there was roughly one job for every resident aged 16-64 (Table 3-3). With the exception of South Cambridgeshire – which recorded a similar jobs density of 1.03 - the job densities recorded in the neighbouring LADs and across the county, regional and national comparators were below 1, indicating that in these areas there was less than one job for every resident aged 16-64. Generally, high jobs densities are associated with urban economies. In the case of Uttlesford, it is likely to be explained by the presence of Stansted Airport which is a major employer (accounting for around 12,000¹ jobs).

Table 3-3: Total Number of Jobs and Jobs Density, 2019

| | Number of Jobs | Jobs Density |
|----------------------|----------------|--------------|
| Uttlesford | 56,000 | 1.01 |
| Braintree | 67,000 | 0.73 |
| Chelmsford | 103,000 | 0.94 |
| East Hertfordshire | 84,000 | 0.9 |
| South Cambridgeshire | 99,000 | 1.03 |
| Essex | 715,000 | 0.79 |
| East of England | 3,268,000 | 0.86 |
| England | 30,999,000 | 0.88 |

Source: ONS Jobs Density Data (2019)

3.11 Since 2010, the total number of jobs in Uttlesford has increased by roughly 16,000 (Table 3-4). Between 2010 and 2015, the average annual growth in the number of jobs was 2.8%. This was on par with the growth rate observed in Braintree and, with the exception of East Hertfordshire (3.3%), exceeded the growth rates observed in the other comparator areas.

3.12 Between 2015 and 2019, the average annual growth rate in the number of jobs in Uttlesford almost doubled to 5%. This exceeded the growth rates observed in the neighbouring LADs and across the county, regional and national comparators.

Table 3-4: Total Number of Jobs and CAGR (%) 2010-2019

| | 2010 | 2015 | 2019 | 2010-2015 | 2015-2019 |
|----------------------|--------|--------|---------|-----------|-----------|
| Uttlesford | 40,000 | 46,000 | 56,000 | 2.8 | 5.0 |
| Braintree | 55,000 | 63,000 | 67,000 | 2.8 | 1.6 |
| Chelmsford | 93,000 | 95,000 | 103,000 | 0.4 | 2.0 |
| East Hertfordshire | 62,000 | 73,000 | 84,000 | 3.3 | 3.6 |
| South Cambridgeshire | 81,000 | 87,000 | 99,000 | 1.4 | 3.3 |

¹ Uttlesford District Council (2018) *Uttlesford Economic Development Strategy and Action Plan 2018-21. 'Supporting Sustainable Business Growth'*

| | 2010 | 2015 | 2019 | 2010-2015 | 2015-2019 |
|-----------------|------------|------------|------------|-----------|-----------|
| Essex | 608,000 | 667,000 | 715,000 | 1.9 | 1.8 |
| East of England | 2,770,000 | 3,053,000 | 3,268,000 | 2.0 | 1.7 |
| England | 26,295,000 | 29,219,000 | 30,999,000 | 2.1 | 1.5 |

Source: SQW Analysis of ONS Jobs Density Data (2019)

Comparison to CE's projections (Working Paper 3)

- 3.13** Data within the projections produced by Cambridge Econometrics differ slightly to the ONS Jobs Density data. The Cambridge Econometrics data estimated there to be 53,900 jobs in Uttlesford in 2019 (in comparison to 56,000), and the growth rates between 2010-2015 and 2015-2019 were 1.5% per annum and 4.7% per annum respectively, lower than those derived from the ONS Jobs Density data.
- 3.14** The Cambridge Econometrics forecasts also estimated there to be fewer jobs in the East of England in 2019 than the ONS Jobs Density Data (3,221,000 in comparison to 3,268,000) and the growth rates between 2010-2015 and 2015-2019 were also lower than those derived from the ONS Jobs Density data (1.7% and 1.2% respectively in comparison to 2% and 1.7%).

Economic Activity, Employment and Unemployment Rate

- 3.15** In the 12 months to December 2020, the economic activity rate and the employment rate of the working age population in Uttlesford was 77.1% and 75.2% respectively (Table 3-5). These appeared to be the lowest rates recorded amongst the neighbouring LADs and lower than the county, regional and national comparators. Figure 3-3 and Figure 3-4 reveal however that the economic activity rate and employment rate of the working age population in Uttlesford have generally exceeded the average for England. The volatility in the data is a consequence of survey-related issues.
- 3.16** From APS, there are no data on the unemployment rate in Uttlesford due to the sample size being too small.

Table 3-5: Economic Activity Rate, Economic Employment Rate and Unemployment Rate, Aged 16-64 (%), 2020 (12 Months to December 2020)

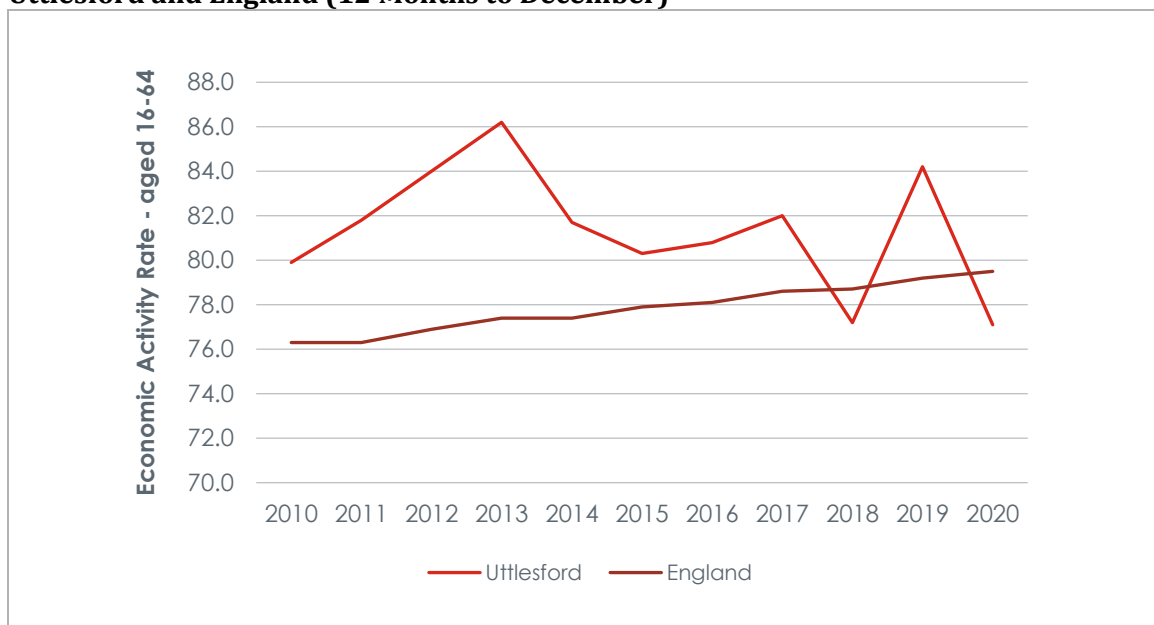
| | Economic activity rate - aged 16-64 | Employment rate - aged 16-64 | Unemployment rate - aged 16-64 |
|----------------------|-------------------------------------|------------------------------|--------------------------------|
| Uttlesford | 77.1 | 75.2 | ! |
| Braintree | 87.6 | 86 | ! |
| Chelmsford | 83.1 | 80.8 | 2.8 |
| East Hertfordshire | 79.4 | 76.2 | 4 |
| South Cambridgeshire | 78.3 | 76.1 | 2.8 |
| Essex | 78.9 | 76 | 3.6 |
| East of England | 80.4 | 77.2 | 4 |

| | Economic activity rate - aged 16-64 | Employment rate - aged 16-64 | Unemployment rate - aged 16-64 |
|---------|-------------------------------------|------------------------------|--------------------------------|
| England | 79.5 | 75.7 | 4.8 |

Source: ONS Annual Population Survey (2020)

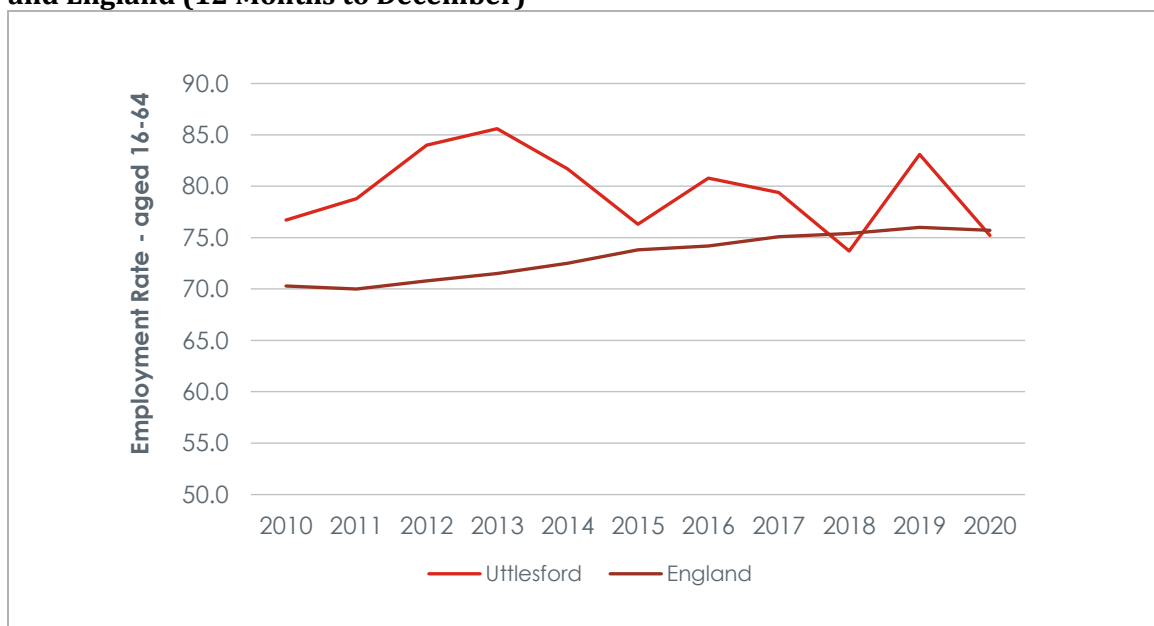
! Estimate and confidence interval not available since the group sample size is zero or disclosive (0-2).

Figure 3-3: Economic Activity Rate of the Working Aged Population, 2010-2020, Uttlesford and England (12 Months to December)



Source: SQW Analysis of ONS Annual Population Survey (2020)

Figure 3-4: Employment Rate of the Working Aged Population, 2010-2020, Uttlesford and England (12 Months to December)



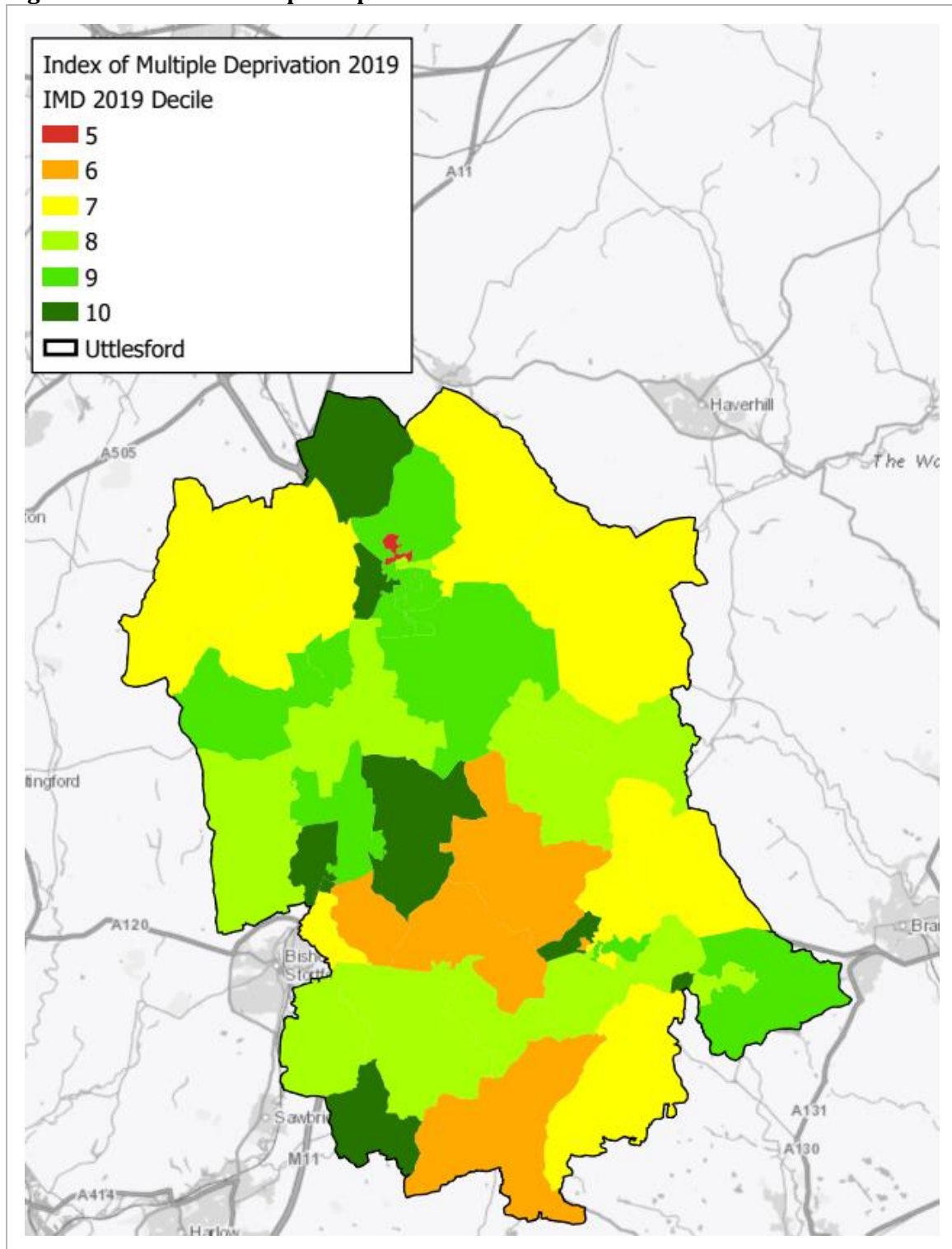
Source: SQW Analysis of ONS Annual Population Survey (2020)

Deprivation

- 3.17** The Index of Multiple Deprivation (IMD) is the official measure of relative deprivation for small areas in England. The IMD decile is calculated by ranking the 32,844 LSOAs in England from most deprived area (1) to least deprived area (32,844) and dividing them into 10 equal groups. LSOAs in the first decile are therefore in the 10% most deprived areas in England, whilst those in tenth decile are in the 10% least deprived².
- 3.18** Mapping the deciles of LSOAs in Uttlesford confirms that the district is relatively affluent: there are no LSOAs classified as falling within the 40% most deprived areas in England and there are large swathes of green shading indicating that there are areas of the district that are in the 30% least deprived in England (Figure 3-5).
- 3.19** Notably, LSOAs in the tenth decile (10% least deprived) are concentrated along the major north-south transport axis: in the north of the District near Great Chesterford, in the centre of the District near Stansted Mountfitchet and Elsenham, and in the south west of the District near Hatfield Heath.
- 3.20** Areas of relative deprivation (indicated by orange and red shading) are more concentrated in the southern part of the district, although there is a pocket of deprivation just north of Saffron Walden and adjacent to an area of relative affluence.

² <https://www.gov.uk/government/statistics/english-indices-of-deprivation-2019>

Figure 3-5: Index of Multiple Deprivation Deciles 2019 - Uttlesford



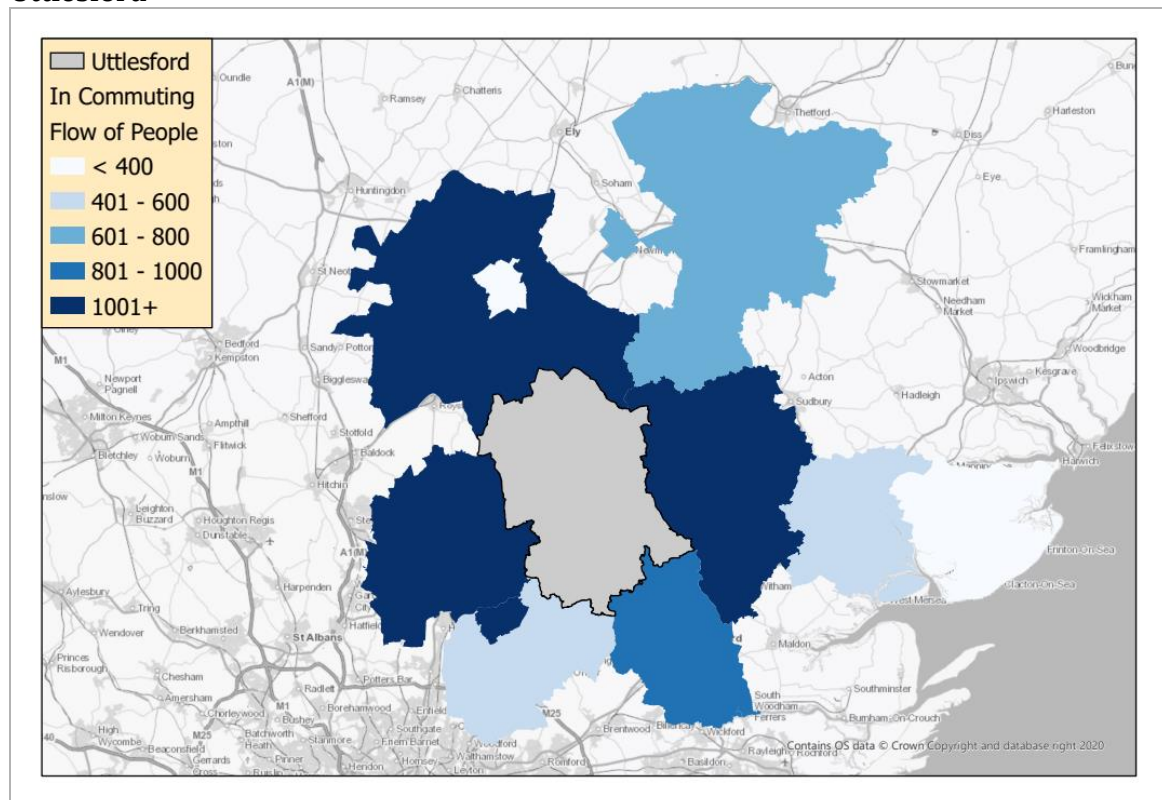
Source: English Indices of Multiple Deprivation (2019) Produced by SQW 2021. Licence 100030994

4. Commuting and Earnings

Commuting

- 4.1** At the time of the 2011 Census, 13,006 people both lived and worked in Uttlesford.
- 4.2** With regards to in-commuting (Figure 4-1), the top three Local Authority Districts of residence for people working in Uttlesford but living elsewhere were Braintree (3,830 people), East Hertfordshire (3,418) and South Cambridgeshire (1,178). The other LADs making up the top ten included Harlow, Chelmsford, St Edmundsbury, Colchester, Epping Forest, Cambridge and Tendring.

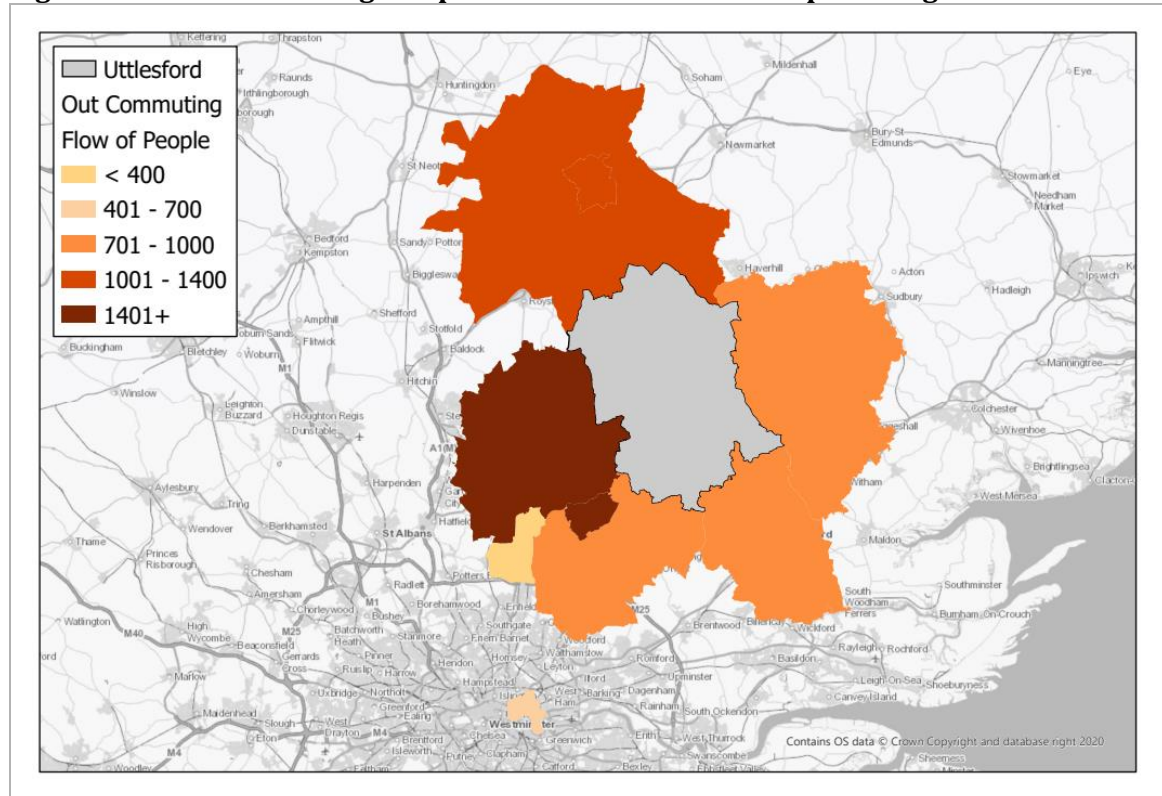
Figure 4-1: In Commuting – Top 10 Places of Residence for People Working in Uttlesford



Source: 2011 Census, Location of Usual Residence and Place of Work. Produced by SQW 2021. Licence 100030994

- 4.3** With regards to out commuting (Figure 4-2) the top three LADs of work for people living in Uttlesford but working elsewhere were East Hertfordshire (2,972), Westminster (1,978) and Harlow (1,412). The other LADs making up the top ten included Cambridge, South Cambridgeshire, Chelmsford, Braintree, Epping Forest, Tower Hamlets and Broxbourne.

Figure 4-2: Out Commuting – Top 10 Places of Work for People Living in Uttlesford



Source: 2011 Census, Location of Usual Residence and Place of Work. Produced by SQW 2021. Licence 100030994

- 4.4** Subtracting the total number of people commuting out of Uttlesford for work (17,973) from the total number of people commuting into Uttlesford for work (17,618) results in an overall balance of -355. Although there were reasonably significant flows of both in- and out-commuters to/from Uttlesford, at the time of the last Census, these were close to being balanced.

Earnings

- 4.5** With regards to the resident earnings analysis, the median gross weekly earnings for full-time employees living in Uttlesford in 2020 were £660 (Table 4-1). This was mid range in relation to the neighbouring LADs – resident earnings were higher in East Hertfordshire (£710) and South Cambridgeshire (£720) but lower in Chelmsford (£630) and Braintree (£580) – but exceeded the county, regional and national comparators.
- 4.6** With regards to the workplace analysis, the median gross weekly earnings for full-time employees working in Uttlesford in 2020 were £570. With the exception of Braintree and Essex, this was lower than the workplace earnings recorded across the comparator areas. Notably, the median gross weekly earnings were £100 higher for full-time employees working in South Cambridgeshire compared to Uttlesford.

Table 4-1: Median Gross Weekly Earnings (£) for Full-Time Employees, 2020

| | Resident Analysis (£) | Workplace Analysis (£) |
|----------------------|-----------------------|------------------------|
| Uttlesford | 660 | 570 |
| Braintree | 580 | 520 |
| Chelmsford | 630 | 580 |
| East Hertfordshire | 710 | 610 |
| South Cambridgeshire | 720 | 670 |
| Essex | 620 | 560 |
| East of England | 600 | 570 |
| England | 590 | 590 |

Source: Annual Survey of Hours and Earnings (2020)

- 4.7** Between 2010 and 2020, growth was recorded in both the resident and workplace earnings for full-time employees in Uttlesford (Table 4-2). With regards to resident earnings, the median gross weekly earnings for full-time employees living in Uttlesford increased at a rate of 1.7% per annum over the ten year period. With the exception of South Cambridgeshire – which recorded an annual growth rate of 2% - this was higher than the neighbouring LADs and the county, regional and national comparators.
- 4.8** With respect to workplace earnings, the median gross weekly earnings for full-time employees working in Uttlesford increased at a rate of 1.6% per annum between 2010 and 2020. This was lower than the rate of growth recorded for workplace earnings in East Hertfordshire (2.1%), higher than the rates of growth recorded in Braintree, Chelmsford, South Cambridgeshire and across Essex, and on par with the regional and national comparators.

Table 4-2: Change in Median Gross Weekly Earnings (£) for Full-Time Employees, CAGR (%) 2010-2020

| | Resident Analysis | Workplace Analysis |
|----------------------|-------------------|--------------------|
| Uttlesford | 1.7 | 1.6 |
| Braintree | 0.8 | 0.9 |
| Chelmsford | 1.2 | 1.0 |
| East Hertfordshire | 1.1 | 2.1 |
| South Cambridgeshire | 2.0 | 1.1 |
| Essex | 1.4 | 1.4 |
| East of England | 1.5 | 1.6 |
| England | 1.5 | 1.6 |

Source: SQW Analysis of Annual Survey of Hours and Earnings Data (2020)

5. Enterprise

Number and Size of Enterprises

- 5.1** In 2020, there were 5,475 enterprises in Uttlesford, the lowest number recorded amongst the comparator LADs (Table 5-1).
- 5.2** Between 2010 and 2015 the number of enterprises in Uttlesford increased at a rate of 1.9% per annum; this rate of growth was the same as that observed in Braintree but lower than the rates observed across the remaining LADs and the county, regional and national comparators.
- 5.3** Between 2015 and 2020, the rate of growth slowed to 1.5% per annum; again this was lower than the rates observed across the neighbouring LADs – with the exception of Braintree – and across Essex, the East of England and England. With the exception of East Hertfordshire, all comparator areas experienced a decline in the rate of growth of the number of enterprises across the five year period.

Table 5-1: Total Number of Enterprises, 2020 and CAGR (%) 2010-2020

| | 2010 | 2015 | 2020 | 2010-2015 | 2015-2020 |
|----------------------|-----------|-----------|-----------|-----------|-----------|
| Uttlesford | 4,635 | 5,090 | 5,475 | 1.9 | 1.5 |
| Braintree | 5,875 | 6,440 | 6,615 | 1.9 | 0.5 |
| Chelmsford | 6,180 | 7,245 | 8,215 | 3.2 | 2.5 |
| East Hertfordshire | 6,815 | 7,625 | 8,720 | 2.3 | 2.7 |
| South Cambridgeshire | 6,930 | 7,815 | 8,590 | 2.4 | 1.9 |
| Essex | 52,260 | 59,575 | 66,535 | 2.7 | 2.2 |
| East of England | 213,640 | 242,975 | 271,395 | 2.6 | 2.2 |
| England | 1,797,910 | 2,116,295 | 2,390,970 | 3.3 | 2.5 |

Source: SQW Analysis of UK Business Counts Data (2020)

- 5.4** In 2020, 91% of the enterprises in Uttlesford were classified as micro (having between zero and nine employees), 7.5% were classified as small (10-49 employees), 1.2% were medium (50-249 employees) and 0.2% were large (250+ employees) (Table 5-2).
- 5.5** Looking across the comparator areas, the size distribution of enterprises in Uttlesford in 2020 included a relatively higher proportion of micro enterprises, and a relatively lower proportion of SMEs.

Table 5-2: Size Distribution of Enterprises, 2020 (% of Total Enterprises)

| | Micro (0-9) | Small (10-49) | Medium (50-249) | Large (250+) |
|----------------------|-------------|---------------|-----------------|--------------|
| Uttlesford | 91.1 | 7.5 | 1.2 | 0.2 |
| Braintree | 89.0 | 9.0 | 1.7 | 0.2 |
| Chelmsford | 90.6 | 7.7 | 1.3 | 0.4 |
| East Hertfordshire | 90.8 | 7.6 | 1.4 | 0.2 |
| South Cambridgeshire | 89.0 | 8.8 | 1.7 | 0.5 |
| Essex | 90.2 | 8.1 | 1.4 | 0.3 |
| East of England | 90.0 | 8.1 | 1.5 | 0.4 |
| England | 89.7 | 8.4 | 1.5 | 0.4 |

Source: SQW Analysis of UK Business Counts Data (2020)

- 5.6** With the exception of medium enterprises - the number of which increased at the rate of 5% per annum between 2010 and 2020, greatly exceeding the pace of growth observed across the comparator areas – the annual growth rate in the number of micro, small and large enterprises in Uttlesford was relatively low in comparison to the neighbouring LADs and the county, regional and national comparators (Table 5-3).

Table 5-3: Size Distribution of Enterprises, CAGR (%) 2010-2020

| | Micro (0-9) | Small (10-49) | Medium (50-249) | Large (250+) |
|----------------------|-------------|---------------|-----------------|--------------|
| Uttlesford | 1.6 | 1.7 | 5.0 | 0.0 |
| Braintree | 1.2 | 0.9 | 3.7 | 11.6 |
| Chelmsford | 2.9 | 2.8 | 3.9 | 1.8 |
| East Hertfordshire | 2.5 | 2.7 | 4.1 | 2.9 |
| South Cambridgeshire | 2.2 | 2.1 | 2.3 | 2.9 |
| Essex | 2.5 | 1.9 | 3.8 | 1.4 |
| East of England | 2.5 | 1.8 | 2.4 | 1.7 |
| England | 3.0 | 1.9 | 2.5 | 2.3 |

Source: SQW Analysis of UK Business Counts Data (2020)

Sectoral Analysis

- 5.7** In 2020, the largest sector in Uttlesford by the number of enterprises was *Professional, Scientific and Technical Services*, accounting for 19% of total enterprises), followed by *Construction* (16%) and *Wholesale and Retail Trade* (11.8%) (Table 5-4). Other sectors that accounted for greater than 5% of the total number of enterprises included *Administration and Support Service Activities* (9.7%), *Information and Communication* (7.5%), *Agriculture, Forestry and Fishing* (6.8%) and *Manufacturing* (5.5%).
- 5.8** Analysis of ten-year compound annual growth rates reveals that between 2010 and 2020 the *Construction* and *Administration and Support Services Activities* sectors experienced notable growth, of just under 3% per annum. *Wholesale and Retail Trade* was the only sector that declined in size during the ten-year period, experiencing a 0.7% fall in the number of enterprises per annum.

Table 5-4: Sectoral Distribution of Enterprises, 2020 (% of Total Enterprises)

| | Uttlesford | Braintree | Chelmsford | East Hertfordshire | South Cambridgeshire | Essex | East of England | England |
|--|------------|-----------|------------|--------------------|----------------------|-------|-----------------|---------|
| A : Agriculture, forestry and fishing | 6.8 | 6.0 | 2.7 | 2.6 | 6.3 | 3.3 | 4.4 | 4.2 |
| B : Mining and quarrying | 0.0 | 0.1 | 0.1 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| C : Manufacturing | 5.5 | 7.2 | 4.2 | 4.5 | 9.0 | 5.4 | 5.3 | 4.9 |
| D : Electricity, gas, steam and air conditioning supply | 0.3 | 0.0 | 0.1 | 0.3 | 0.1 | 0.1 | 0.1 | 0.2 |
| E : Water supply; sewerage, waste management and remediation activities | 0.3 | 0.4 | 0.4 | 0.5 | 0.2 | 0.4 | 0.3 | 0.3 |
| F : Construction | 16.0 | 18.7 | 17.2 | 15.7 | 12.4 | 19.6 | 16.0 | 12.8 |
| G : Wholesale and retail trade; repair of motor vehicles and motorcycles | 11.8 | 12.9 | 12.7 | 11.9 | 10.2 | 13.1 | 13.7 | 14.1 |

| | Uttlesford | Braintree | Chelmsford | East Hertfordshire | South Cambridgeshire | Essex | East of England | England |
|---|------------|-----------|------------|--------------------|----------------------|-------|-----------------|---------|
| H : Transportation and storage | 3.2 | 3.6 | 3.1 | 6.2 | 2.0 | 4.6 | 5.1 | 4.6 |
| I : Accommodation and food service activities | 3.6 | 4.4 | 4.3 | 3.6 | 3.4 | 4.5 | 4.9 | 5.6 |
| J : Information and communication | 7.5 | 6.9 | 10.2 | 8.3 | 11.1 | 7.5 | 8.2 | 8.7 |
| K : Financial and insurance activities | 2.3 | 1.5 | 2.6 | 1.8 | 1.5 | 2.1 | 1.9 | 2.3 |
| L : Real estate activities | 3.3 | 2.9 | 3.7 | 4.0 | 3.5 | 3.5 | 3.5 | 3.8 |
| M : Professional, scientific and technical activities | 19.0 | 15.6 | 18.8 | 19.7 | 21.2 | 15.9 | 16.4 | 17.5 |
| N : Administrative and support service activities | 9.7 | 8.5 | 8.8 | 11.0 | 7.9 | 8.9 | 8.4 | 8.8 |
| O : Public administration and defence; compulsory social security | 0.8 | 0.8 | 0.3 | 0.3 | 0.8 | 0.4 | 0.5 | 0.3 |
| P : Education | 1.7 | 1.7 | 1.9 | 1.6 | 1.9 | 1.7 | 1.8 | 1.7 |
| Q : Human health and social work activities | 2.8 | 2.8 | 3.5 | 2.6 | 3.6 | 3.4 | 3.5 | 3.7 |
| R : Arts, entertainment and recreation | 2.3 | 2.3 | 2.0 | 2.3 | 2.1 | 2.1 | 2.2 | 2.5 |
| S : Other service activities | 3.2 | 3.8 | 3.5 | 3.2 | 2.8 | 3.6 | 3.6 | 3.8 |

Source: SQW Analysis of UK Business Counts Data (2020)

5.9 The largest sectors in Uttlesford by the proportion of total employment in 2019 were *Transportation and Storage* (19.6%), *Professional, Scientific and Technical Services* and *Wholesale and Retail Trade* (both 10.9%) (Table 5-5). Other sectors that recorded greater than 5% of total employment included *Accommodation and Food Service Activities* (8.7%), *Manufacturing, Administration and Support Services*, and *Education* (all of which accounted for 6.5%), *Construction* and *Human Health and Social Work Activities* (both of which accounted for 5.4%).

Table 5-5: Employment by Sector, 2019 (% of Total Employment)

| | Uttlesford | Braintree | Chelmsford | East Hertfordshire | South Cambridgeshire | Essex | East of England | England |
|--|------------|-----------|------------|--------------------|----------------------|-------|-----------------|---------|
| A : Agriculture, forestry and fishing | 2.7 | 2.2 | 0.9 | 1.1 | 1.9 | 1.5 | 1.7 | 1.3 |
| B : Mining and quarrying | 0.2 | 0.1 | 0 | 0.1 | 0 | 0 | 0.1 | 0.1 |
| C : Manufacturing | 6.5 | 10.7 | 4.4 | 5.9 | 12.1 | 6.7 | 7.5 | 7.8 |
| D : Electricity, gas, steam and air conditioning supply | 0 | 0 | 0.1 | 0.1 | 0.1 | 0.1 | 0.2 | 0.4 |
| E : Water supply; sewerage, waste management and remediation activities | 0.7 | 0.8 | 1 | 0.4 | 0.5 | 0.8 | 0.7 | 0.6 |
| F : Construction | 5.4 | 8.9 | 6.7 | 6.6 | 6.6 | 7.9 | 6.2 | 5 |
| G : Wholesale and retail trade; repair of motor vehicles and motorcycles | 10.9 | 17.9 | 16.7 | 15.8 | 9.9 | 16.4 | 15.8 | 15.1 |
| H : Transportation and storage | 19.6 | 3.6 | 3.3 | 5.3 | 1.9 | 5.1 | 4.9 | 5 |
| I : Accommodation and food service activities | 8.7 | 5.4 | 6.7 | 6.6 | 4.9 | 6.9 | 6.9 | 7.5 |
| J : Information and communication | 2.7 | 2.7 | 3.9 | 3.9 | 8.8 | 3.3 | 3.8 | 4.4 |

| | Uttlesford | Braintree | Chelmsford | East Hertfordshire | South Cambridgeshire | Essex | East of England | England |
|---|------------|-----------|------------|--------------------|----------------------|-------|-----------------|---------|
| K : Financial and insurance activities | 1.7 | 2.7 | 3.9 | 1.3 | 1.1 | 2.8 | 2.4 | 3.5 |
| L : Real estate activities | 1.7 | 1.8 | 1.9 | 2 | 1.4 | 2 | 1.9 | 2 |
| M : Professional, scientific and technical activities | 10.9 | 8.9 | 7.8 | 10.5 | 25.3 | 8.9 | 9.6 | 9.2 |
| N : Administrative and support service activities | 6.5 | 6.2 | 6.7 | 17.1 | 6.6 | 8.2 | 10.1 | 8.9 |
| O : Public administration and defence; compulsory social security | 2.7 | 3.6 | 5 | 2 | 1.4 | 3 | 3.2 | 3.9 |
| P : Education | 6.5 | 8 | 8.9 | 9.2 | 7.7 | 8.9 | 9 | 8.4 |
| Q : Human health and social work activities | 5.4 | 10.7 | 16.7 | 7.9 | 7.7 | 13 | 11.7 | 12.4 |
| R : Arts, entertainment and recreation | 2 | 2.2 | 2.2 | 2.6 | 1.1 | 2.5 | 2.5 | 2.5 |
| S : Other service activities | 1.5 | 1.8 | 2.8 | 1.6 | 1.9 | 2.1 | 2 | 2.1 |

Source: Business Register and Employment Survey (2019)

5.10 Looking at the absolute numbers, analysis of compound annual growth rates for the period 2015 to 2019 reveals that one of the fastest growing sectors in Uttlesford by total employment was *Professional, Scientific and Technical Services*, recording 9.3% growth per annum. The data also show that the *Wholesale and Retail Trade* and *Construction* sectors declined in size during the four-year period (both sectors recorded annual growth rates of -4.5%).

5.11 Analysis of location quotients (LQ) reveals that employment in the Transportation and Storage sector in Uttlesford in 2019 was almost four times as concentrated than the national average, shown by a LQ of 3.9 (Table 5-6). This reflects the importance of Stansted Airport.

Table 5-6: Location Quotients

| | Uttlesford | Braintree | Chelmsford | East Hertfordshire | South Cambridgeshire | Essex | East of England |
|--|------------|-----------|------------|--------------------|----------------------|-------|-----------------|
| A : Agriculture, forestry and fishing | 2.1 | 1.7 | 0.7 | 0.8 | 1.5 | 1.1 | 1.3 |
| B : Mining and quarrying | 2.6 | 0.6 | 0.3 | 1.6 | 0.4 | 0.5 | 0.7 |
| C : Manufacturing | 0.8 | 1.4 | 0.6 | 0.8 | 1.6 | 0.9 | 1.0 |
| D : Electricity, gas, steam and air conditioning supply | 0.0 | 0.0 | 0.3 | 0.3 | 0.3 | 0.2 | 0.5 |
| E : Water supply; sewerage, waste management and remediation activities | 1.0 | 1.3 | 1.6 | 0.6 | 0.9 | 1.3 | 1.2 |
| F : Construction | 1.1 | 1.8 | 1.3 | 1.3 | 1.3 | 1.6 | 1.2 |
| G : Wholesale and retail trade; repair of motor vehicles and motorcycles | 0.7 | 1.2 | 1.1 | 1.0 | 0.7 | 1.1 | 1.0 |
| H : Transportation and storage | 3.9 | 0.7 | 0.7 | 1.1 | 0.4 | 1.0 | 1.0 |
| I : Accommodation and food service activities | 1.2 | 0.7 | 0.9 | 0.9 | 0.7 | 0.9 | 0.9 |
| J : Information and communication | 0.6 | 0.6 | 0.9 | 0.9 | 2.0 | 0.8 | 0.9 |
| K : Financial and insurance activities | 0.5 | 0.8 | 1.1 | 0.4 | 0.3 | 0.8 | 0.7 |
| L : Real estate activities | 0.9 | 0.9 | 1.0 | 1.0 | 0.7 | 1.0 | 0.9 |

| | Uttlesford | Braintree | Chelmsford | East Hertfordshire | South Cambridgeshire | Essex | East of England |
|---|------------|-----------|------------|--------------------|----------------------|-------|-----------------|
| M : Professional, scientific and technical activities | 1.2 | 1.0 | 0.8 | 1.1 | 2.8 | 1.0 | 1.0 |
| N : Administrative and support service activities | 0.7 | 0.7 | 0.8 | 1.9 | 0.7 | 0.9 | 1.1 |
| O : Public administration and defence; compulsory social security | 0.7 | 0.9 | 1.3 | 0.5 | 0.4 | 0.8 | 0.8 |
| P : Education | 0.8 | 1.0 | 1.1 | 1.1 | 0.9 | 1.1 | 1.1 |
| Q : Human health and social work activities | 0.4 | 0.9 | 1.3 | 0.6 | 0.6 | 1.0 | 0.9 |
| R : Arts, entertainment and recreation | 0.8 | 0.9 | 0.9 | 1.2 | 0.4 | 1.0 | 1.0 |
| S : Other service activities | 0.7 | 0.8 | 1.3 | 0.8 | 0.9 | 1.0 | 0.9 |

Source: SQW Analysis of Business Register and Employment Survey Data (2019)

Enterprise Birth Rates, Death Rates and Survival Rates

- 5.12** In 2019, 580 new enterprises were established in Uttlesford and 600 enterprises ceased trading; these were the lowest rates of enterprise births and deaths recorded amongst the comparator LADs (Table 5-7).
- 5.13** Between 2014 and 2019, the number of enterprise births in Uttlesford fell at a rate of 0.5% per annum. Braintree and East Hertfordshire also recorded negative growth rates for the five-year period (both -1.7%), whilst Chelmsford and South Cambridgeshire recorded annual growth of just over two and three percent respectively. Annual growth rates across the county, regional and national comparators ranged from 2% to 2.2%.
- 5.14** Over the same five year period, the number of enterprise deaths in Uttlesford increased at a rate of almost 10% per annum. With the exception of East Hertfordshire, which recorded a 21.9% annual increase in enterprise deaths, this was substantially higher than the rates recorded for the neighbouring LADs and the county, regional and national comparators.

Table 5-7: Enterprise Births and Deaths 2019, and CAGR (%) 2014-2019

| | Enterprise Births | | Enterprise Deaths | |
|----------------------|-------------------|-----------|-------------------|-----------|
| | 2019 | 2014-2019 | 2019 | 2014-2019 |
| Uttlesford | 580 | -0.5 | 600 | 9.9 |
| Braintree | 715 | -1.7 | 655 | 2.5 |
| Chelmsford | 1,095 | 2.1 | 980 | 4.5 |
| East Hertfordshire | 960 | -1.7 | 1,800 | 21.9 |
| South Cambridgeshire | 1,060 | 3.1 | 895 | 6.6 |
| Essex | 8,875 | 2.1 | 7,720 | 5.3 |
| East of England | 36,040 | 2.0 | 32,670 | 6.5 |
| England | 349,675 | 2.2 | 299,935 | 6.6 |

Source: SQW Analysis of ONS Business Demography Data (2019)

- 5.15** The one-year survival rate of enterprises born in Uttlesford in 2014 was 91.6% (Table 5-8). Other than Braintree, this was the lowest one-year survival rate recorded amongst the comparators.
- 5.16** The three-year survival rate of enterprises born in Uttlesford in 2014 was 64.7%. Although this was lower than the survival rates recorded for East Hertfordshire and South Cambridgeshire (65.6% and 65.4% respectively), it was higher than the rates recorded for Braintree (62.8%) and Chelmsford (64%) and the county (63%), regional (63%) and national comparators (61.4%).

5.17 The five-year survival rate of enterprises born in Uttlesford in 2014 was 47.9%. This was the highest five-year survival rate recorded amongst the neighbouring LADs, and notably was more than three percent higher than the county and regional comparators, and more than five percent higher than the average for England.

Table 5-8: 5-Year Business Survival Rates (of Businesses Born in 2014)

| | 1-year survival | 2-year survival | 3-year survival | 4-year survival | 5-year survival |
|----------------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Uttlesford | 91.6 | 78.2 | 64.7 | 54.6 | 47.9 |
| Braintree | 91.0 | 76.3 | 62.8 | 52.6 | 45.5 |
| Chelmsford | 92.9 | 80.2 | 64.0 | 54.3 | 47.2 |
| East Hertfordshire | 94.3 | 78.5 | 65.6 | 52.6 | 45.0 |
| South Cambridgeshire | 93.4 | 77.5 | 65.4 | 54.9 | 47.3 |
| Essex | 93.7 | 78.0 | 63.0 | 52.1 | 44.8 |
| East of England | 93.1 | 77.3 | 63.0 | 51.6 | 44.5 |
| England | 92.3 | 75.9 | 61.4 | 49.4 | 42.5 |

Source: ONS Business Demography (2019)

6. Conclusions

Summary of Key Findings

- Between 2019 and 2039 the population of Uttlesford is expected to increase by just over 16,000 people. This equates to a rate of growth that is double the rate projected for the East of England and England.
- In 2020, the proportion of working age people with an NVQ Level 4+ qualification in Uttlesford was higher than the average for Essex. There is considerable year-on-year volatility in the available ONS data, but overall, the incidence of working age people qualified to this level is similar to the national average.
- With regards to occupations, Uttlesford had a notably higher proportion of residents employed as Managers, Directors and Senior officials; the data also revealed a 10 percentage point increase in the percentage of residents employed in this occupation class between 2010 and 2020. Conversely, although Uttlesford had a relatively high proportion of residents employed in Professional Occupations in 2020, this was lower than the proportion of residents employed in the occupation class in 2010.
- In 2019 Uttlesford had roughly 56,000 jobs and a job density of 1.01, indicating that there was roughly one job for every resident aged 16-64. The analysis of time series data revealed that job growth had been particularly strong, especially between 2015 and 2019.
- Between 2010 and 2020, economic activity and employment rates have fluctuated (mainly because of issues linked to the data) but overall, they have been close to the national average.
- With regards to deprivation, Uttlesford is a relatively affluent district with LSOAs in the tenth decile (10% least deprived areas in England) concentrated along the major north-south transport axis, although there are some pockets of deprivation in the south of the district and near the market town of Saffron Walden.
- Analysis of earnings data revealed that full time employees living in Uttlesford in 2020 earned over £80 more a week than full time employees working in Uttlesford. Workplace earnings were also notably lower than the comparator areas.
- Growth rates pertaining to the number of enterprises in Uttlesford between 2010 and 2020 were relatively low. Of the growth that did occur over the ten-year period, much of this was driven by growth in the number of medium sized enterprises.
- Sectoral analysis revealed that the largest sectors by the number of enterprises in 2020 were *Professional, Scientific and Technical Services, Construction and Wholesale and Retail Trade*. The largest sectors by the amount of employment in 2019 were *Transportation and Storage, Professional, Scientific and Technical Services and Wholesale and Retail Trade*.

- *Construction and Administration and Support Services Activities* sectors experienced notable growth in the number of enterprises between 2010 and 2020. *Professional, Scientific and Technical Services* experienced fast absolute growth in the employment over the same time period.
- Analysis of location quotients revealed that employment in the *Transportation and Storage* sector was almost four times as concentrated in Uttlesford compared to the national average.
- Enterprise birth and death rates were relatively low in Uttlesford, as were one-year business survival rates, but five-year survival rates were relatively high.



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