

Joint Planning and Strategic Site & Sector Workshop

Mandolay, Guildford

Spatial Distribution of South East Sector Strengths

3rd December 2009

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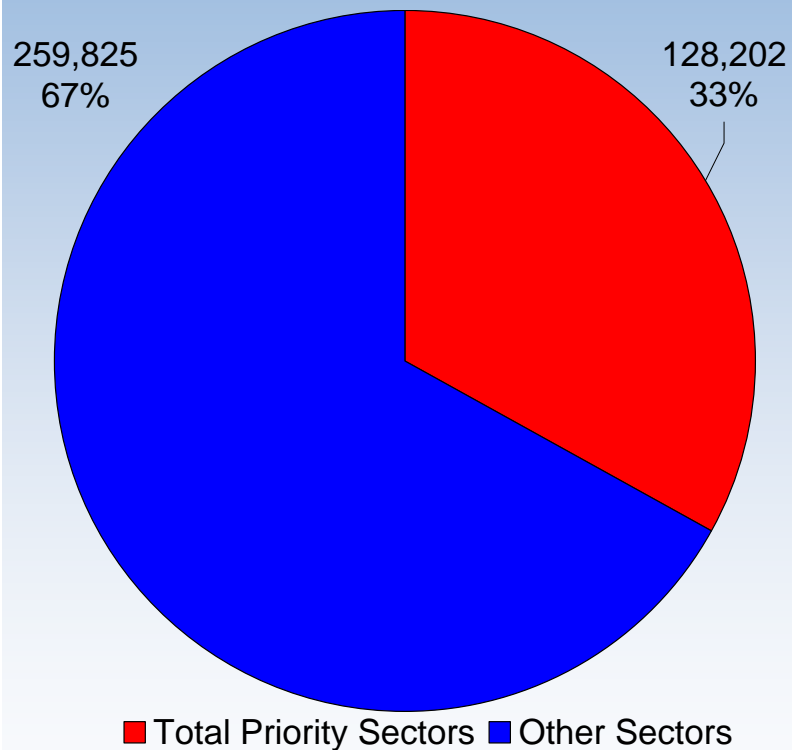
Overview

- Data Sources & Methodology (see Exec. Summary paper)
 - Advantages, disadvantages
- Priority Sectors – Overview
 - Business Units
 - GVA & Employment
 - Labour Productivity
 - Concentration
- Sub-regional Location and Concentration
 - Selected Sectors
- Trends and Forecasts
 - Past trend
 - Recession
 - Projections
- Stage 2

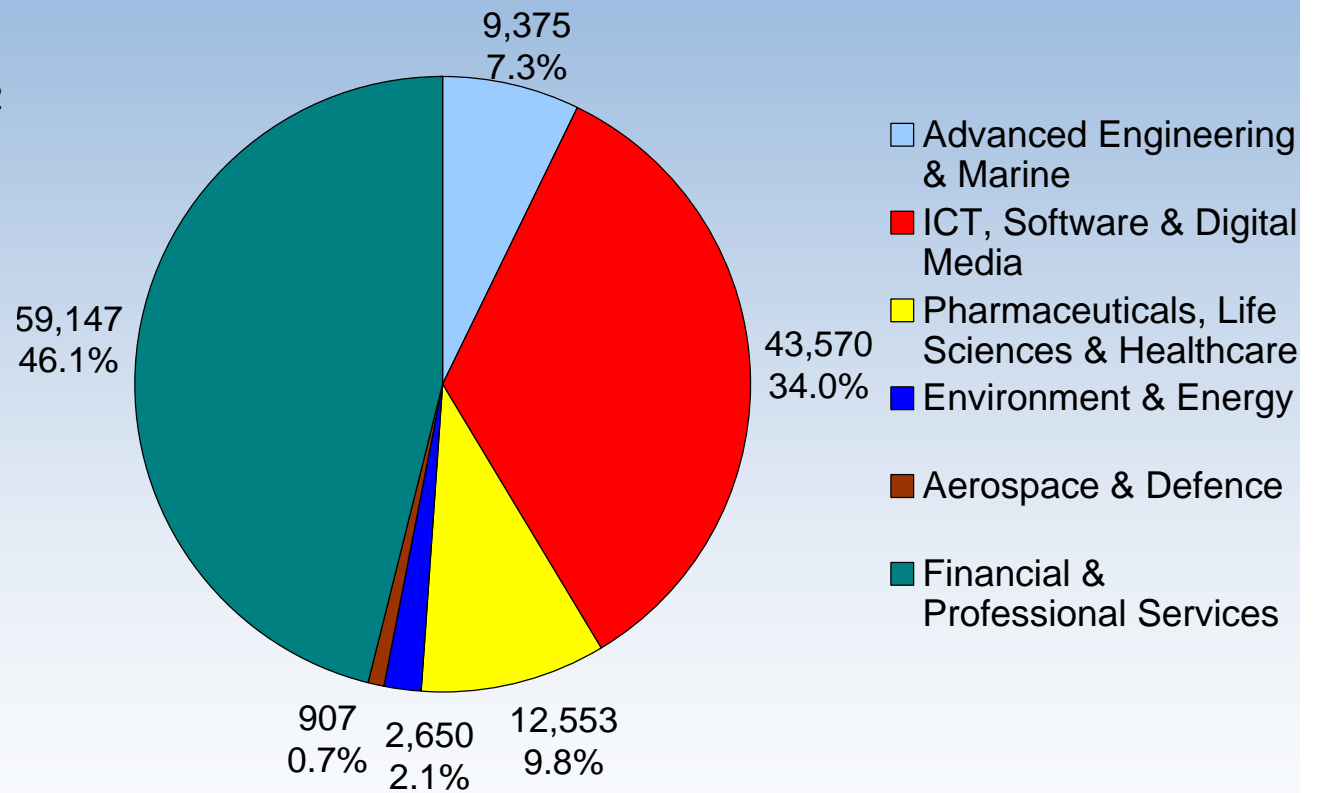
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Business Units

Business Units (2007)

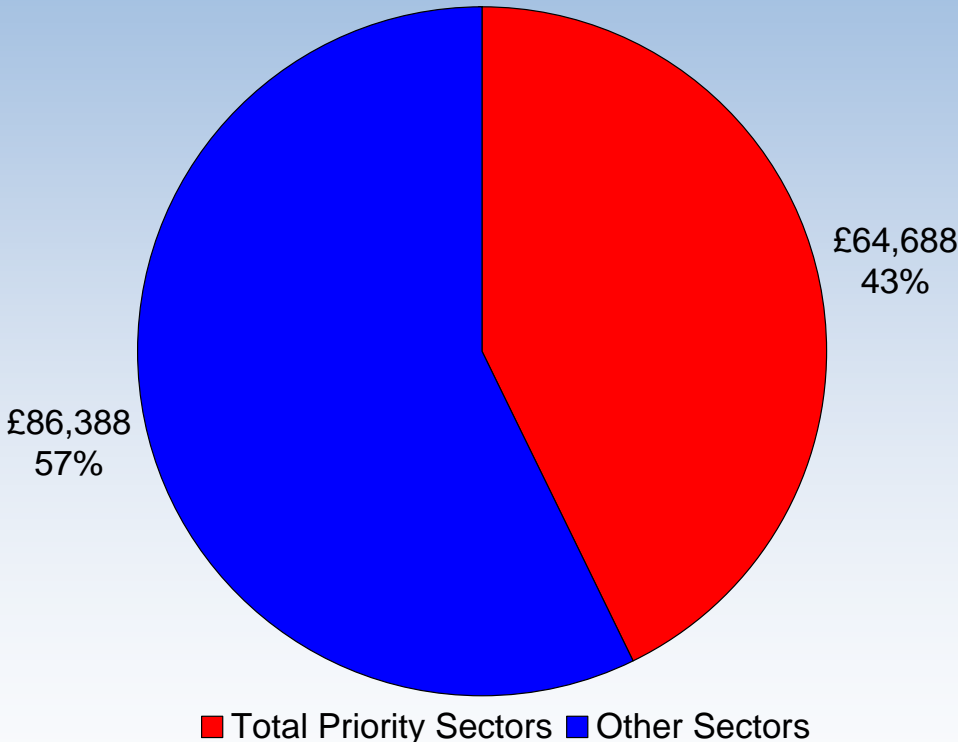


Priority Sectors (2007)

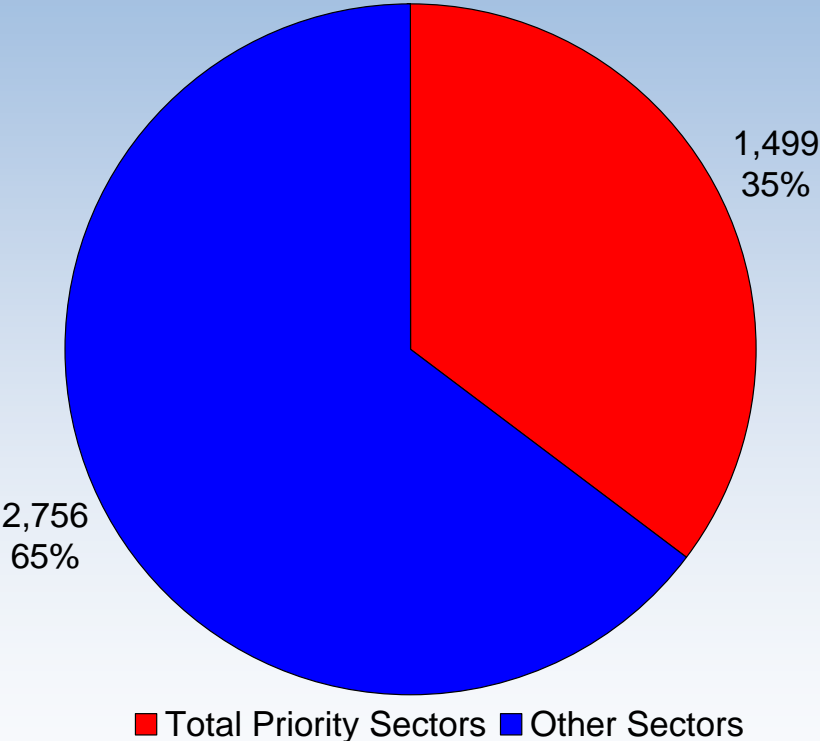


GVA and Employment - 2009

GVA £ millions 2005 constant prices

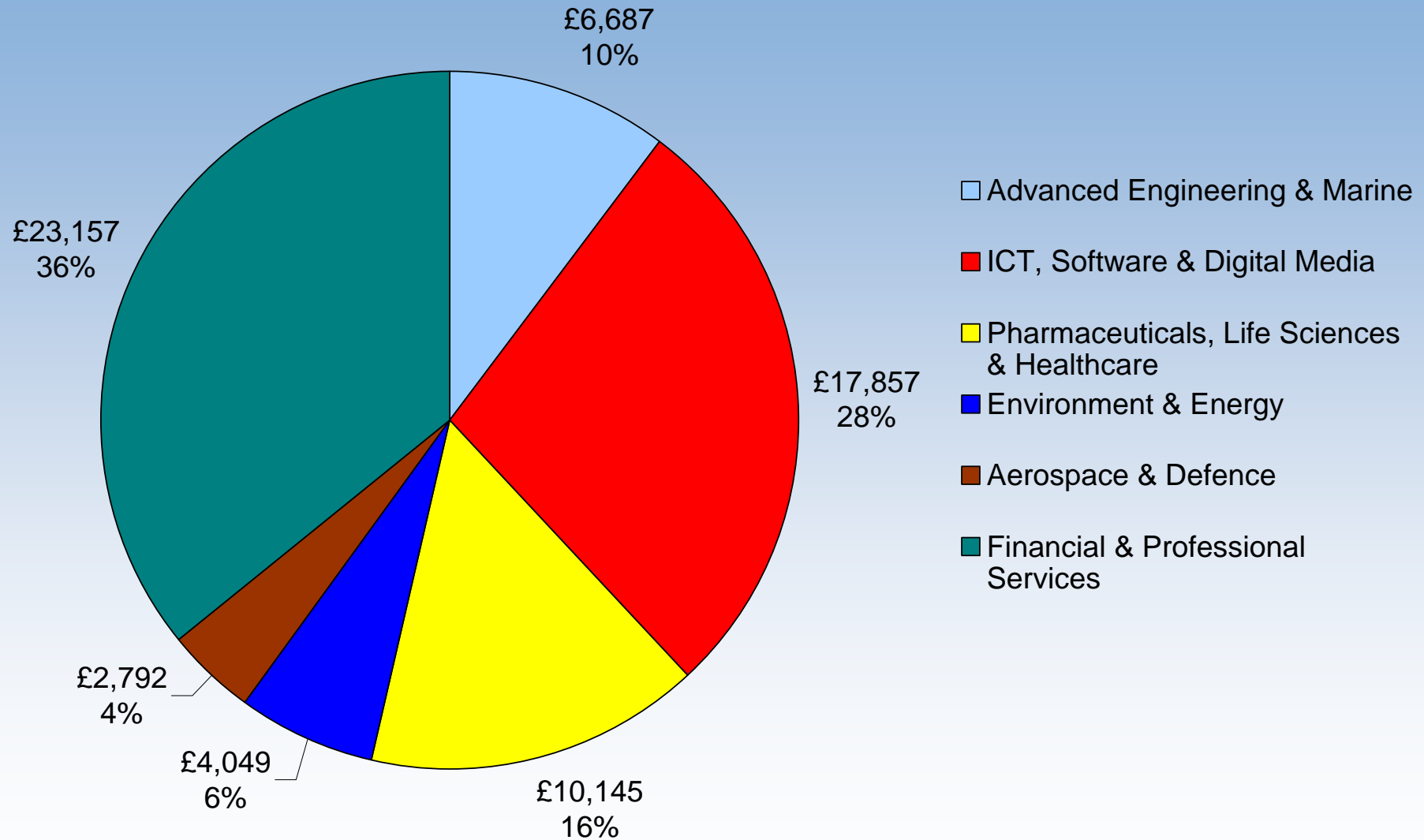


Total employment (thousand)



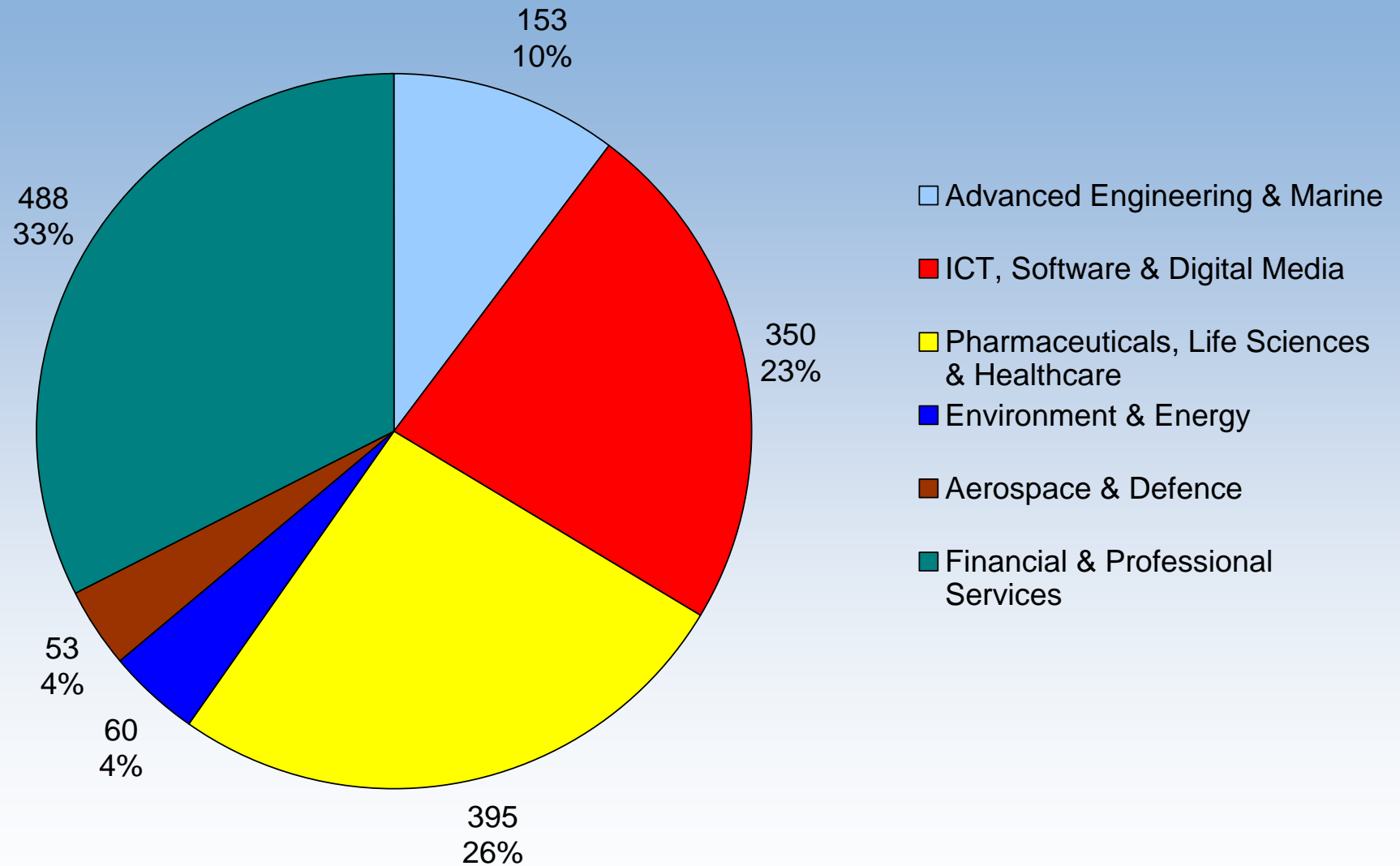
SEEDA Priority Sectors – GVA (millions)

2009



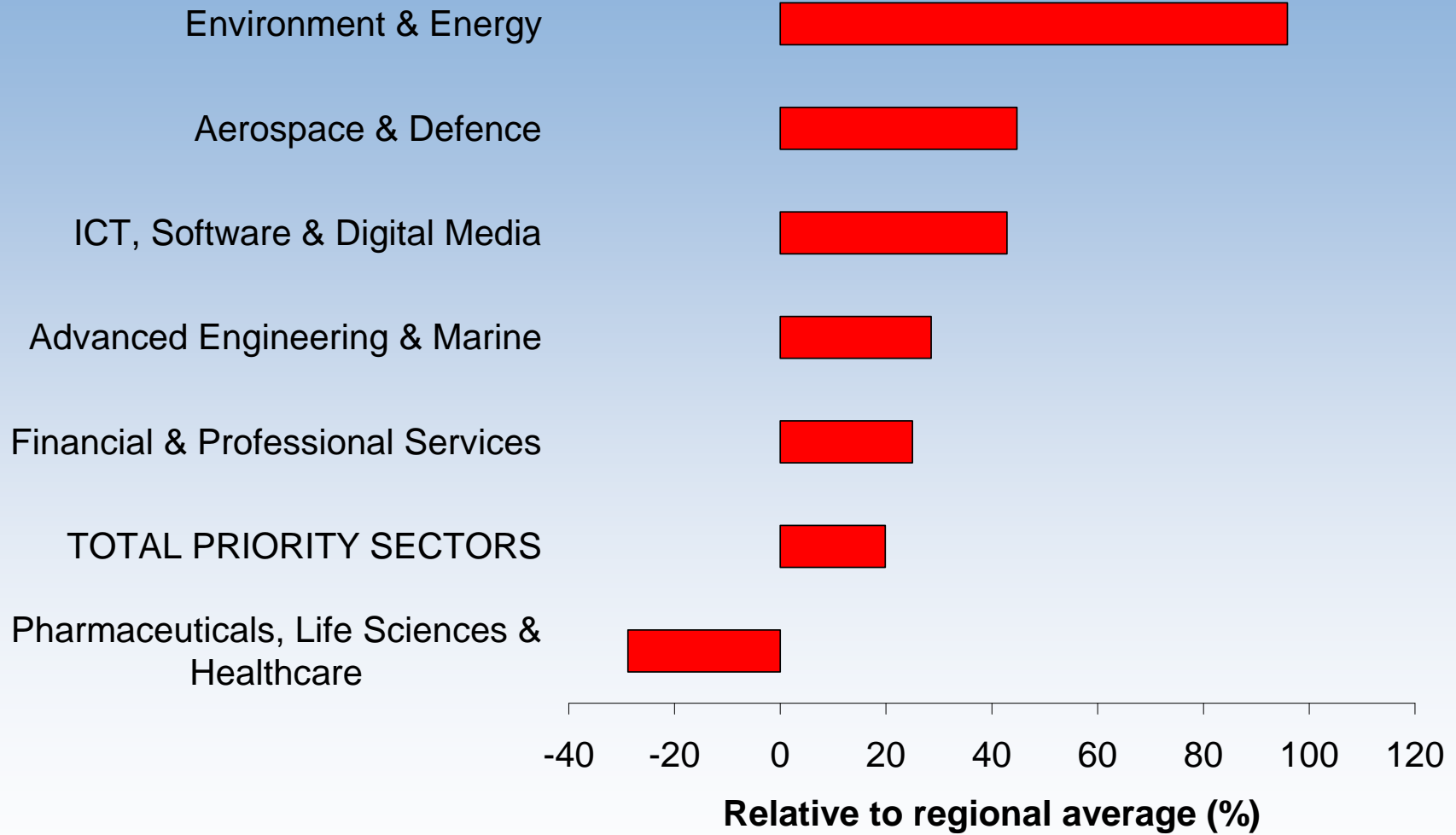
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SEEDA Priority Sectors – Employment (000s) 2009

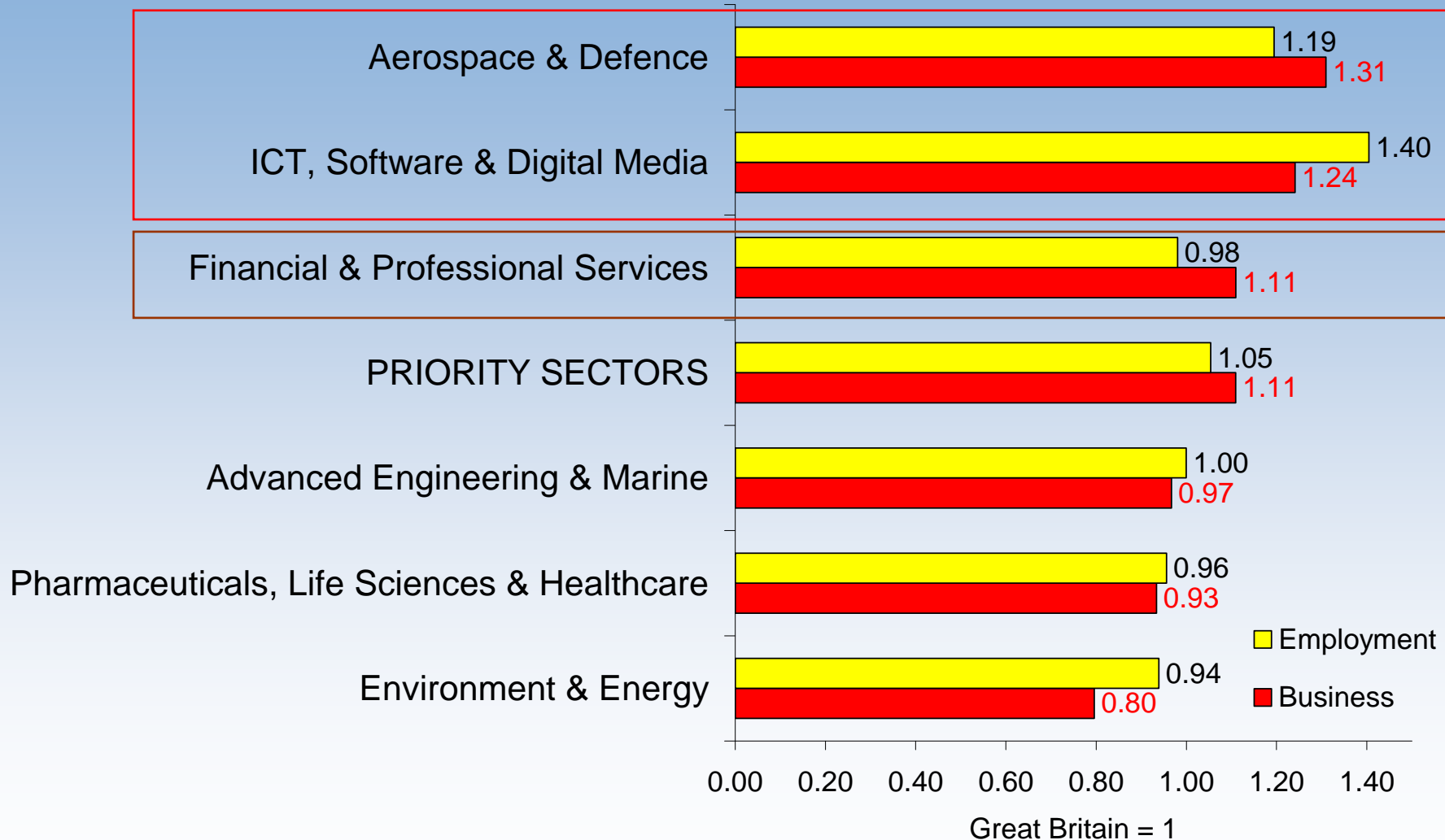


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Labour Productivity



Employment and Business Unit Concentration (relative to national average)

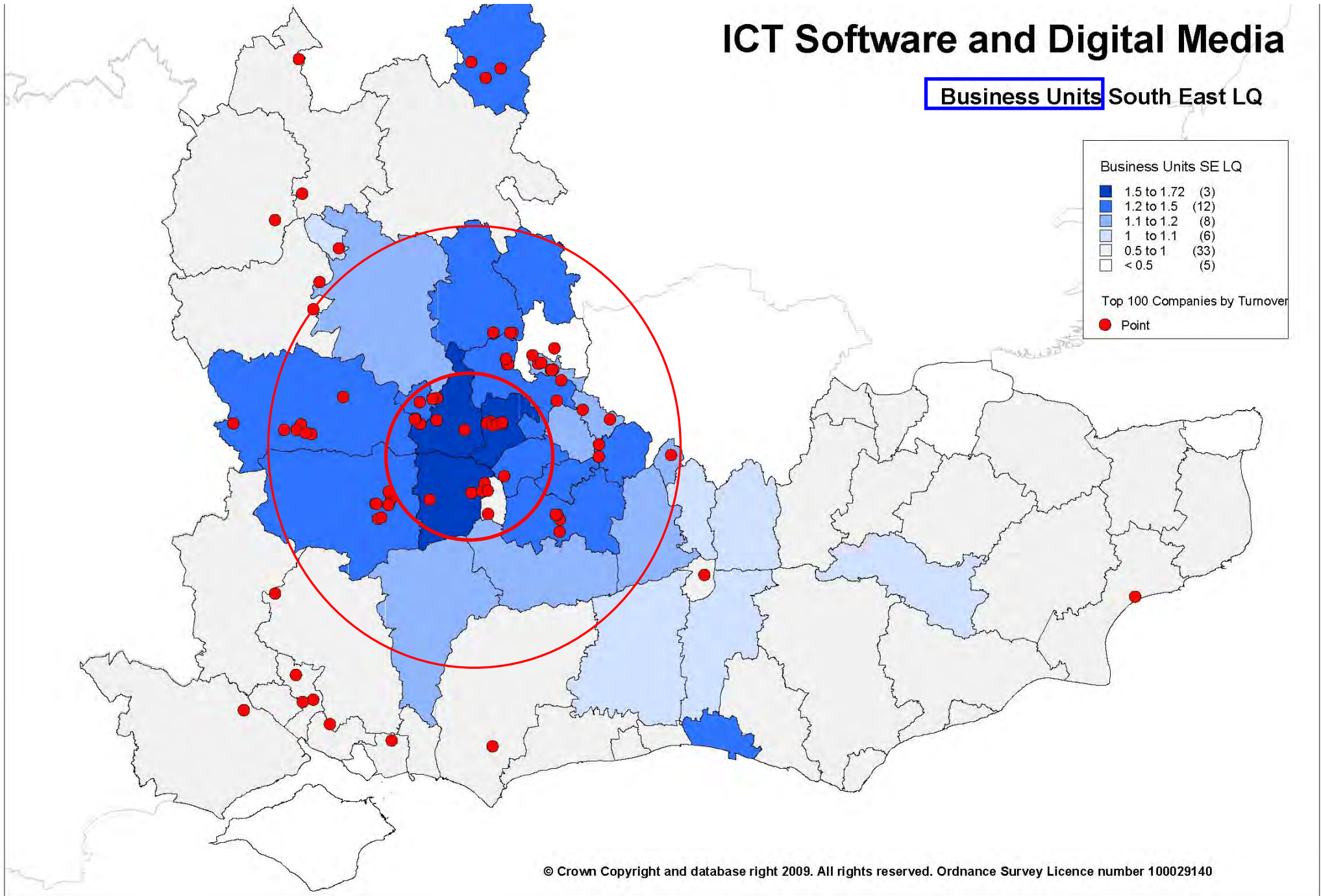


Location & Concentration

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ICT Software and Digital Media

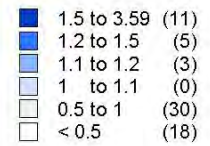
Business Units South East LQ



ICT, Software & Digital Media

Employee South East LQ

Employee SE LQ



Top 100 Companies by Turnover

● Point

Financial & Professional Services

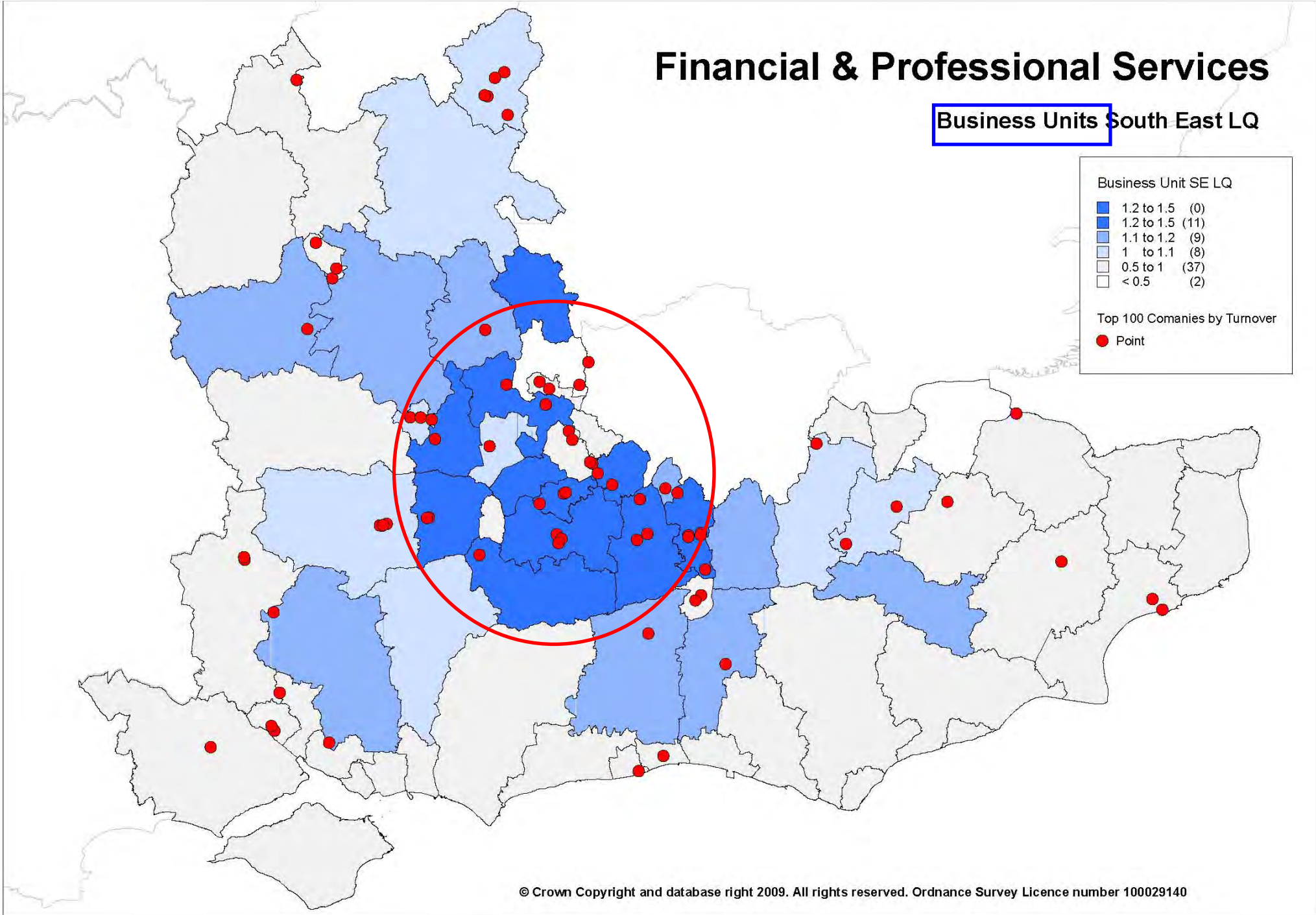
Business Units South East LQ

Business Unit SE LQ

- 1.2 to 1.5 (0)
- 1.2 to 1.5 (11)
- 1.1 to 1.2 (9)
- 1 to 1.1 (8)
- 0.5 to 1 (37)
- < 0.5 (2)

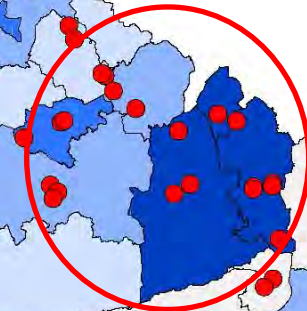
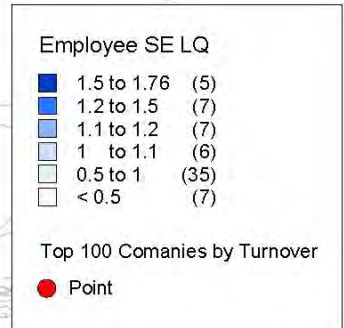
Top 100 Comanies by Turnover

● Point



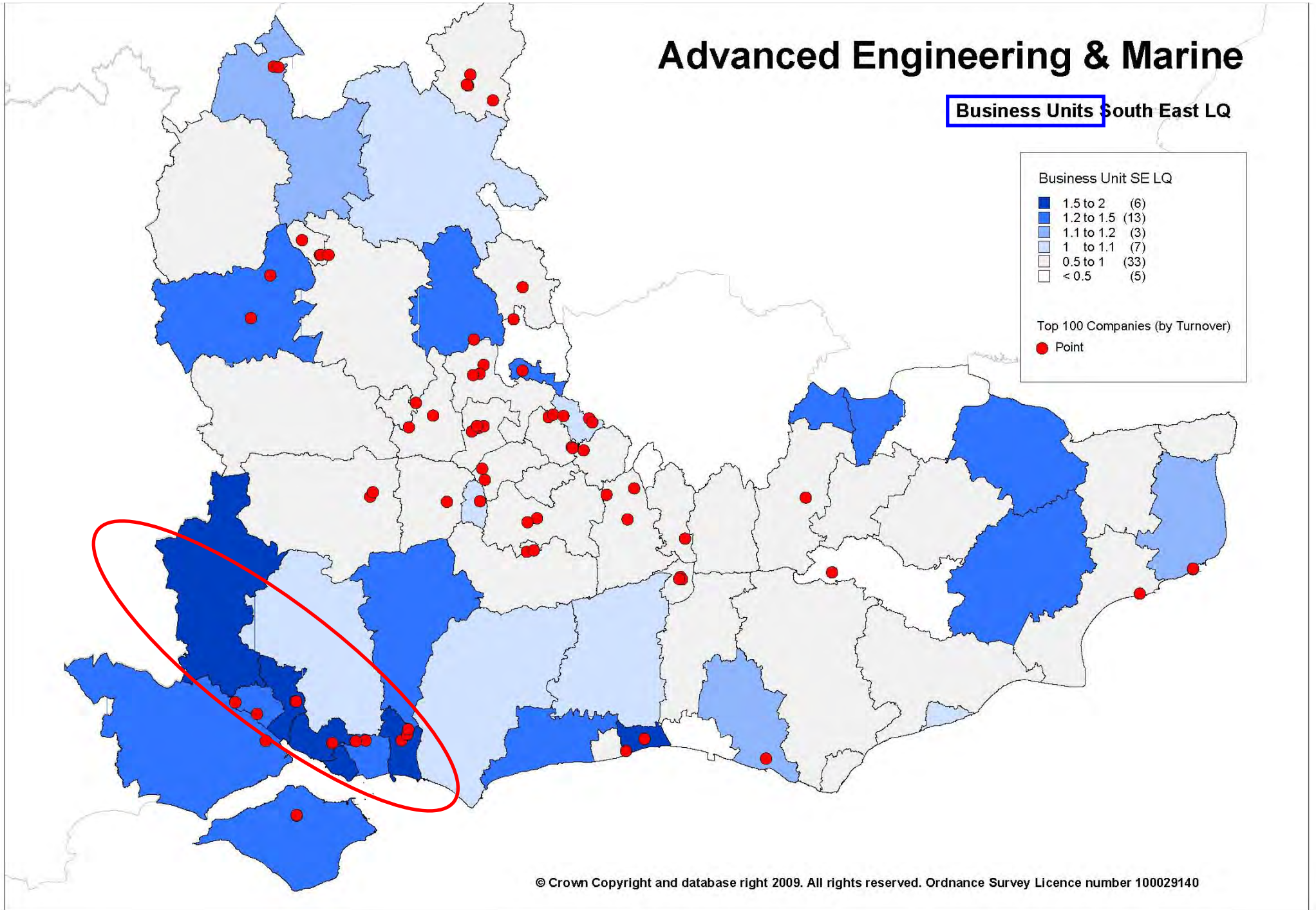
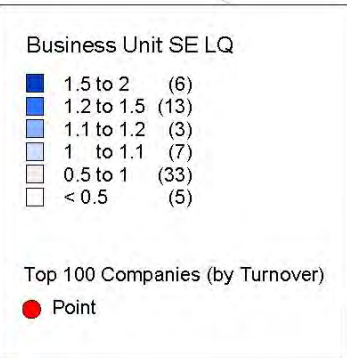
Financial & Professional Services

Employee South East LQ



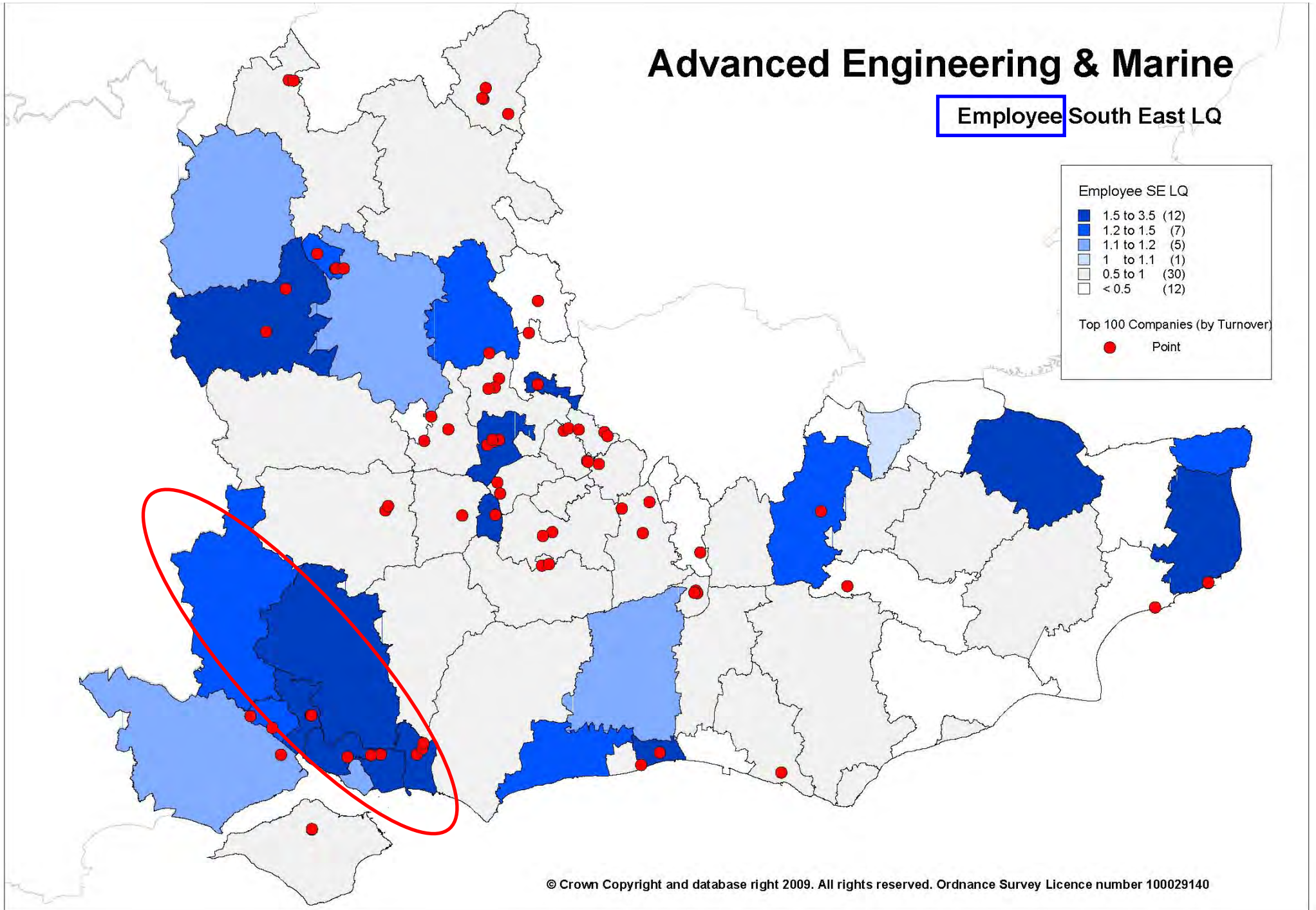
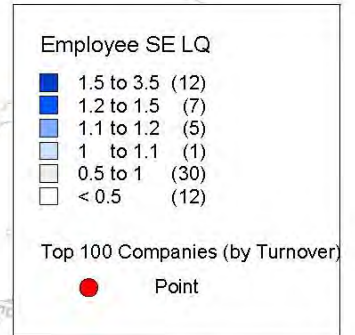
Advanced Engineering & Marine

Business Units South East LQ



Advanced Engineering & Marine

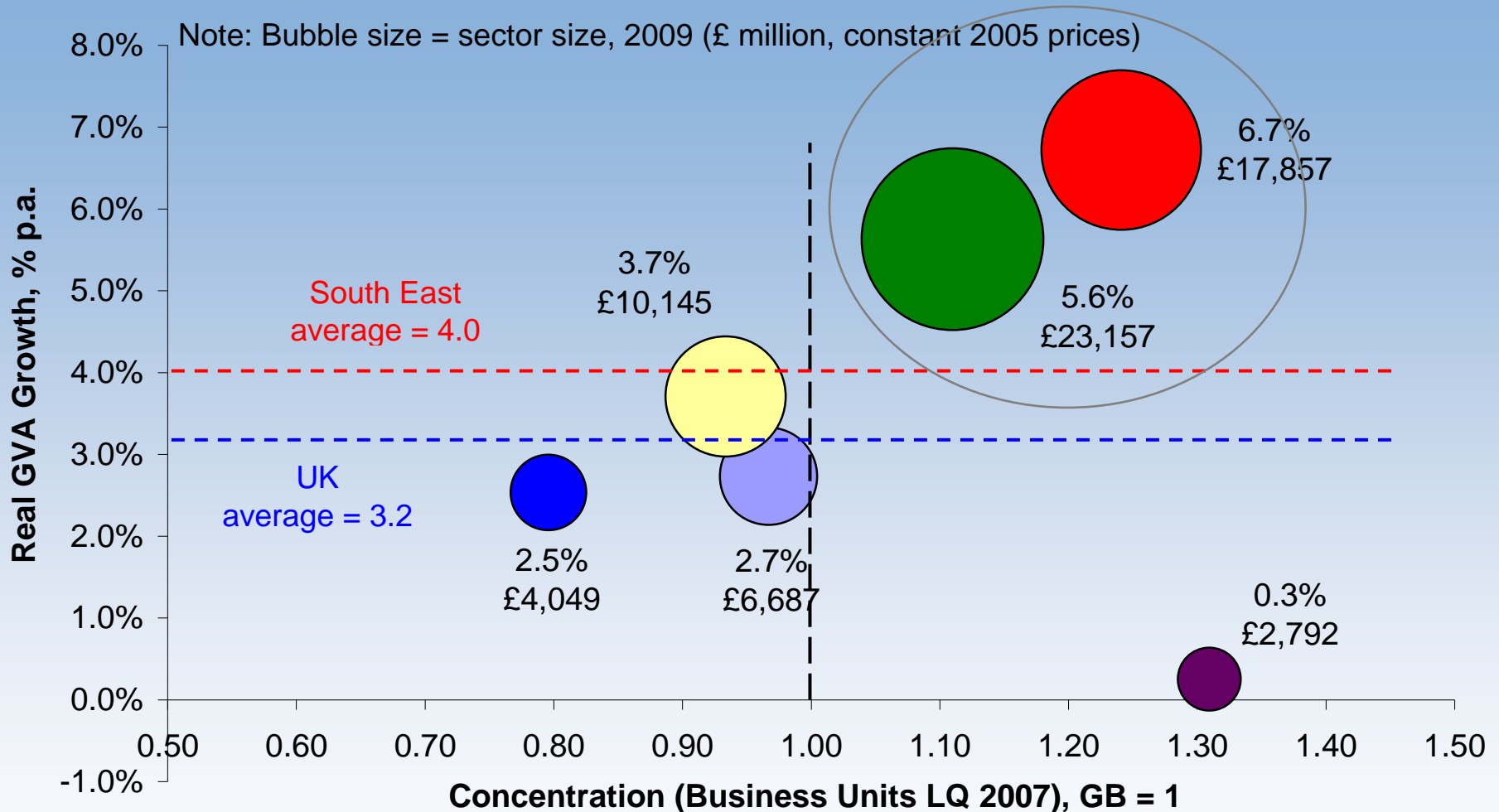
Employee South East LQ



Trend and Forecasts

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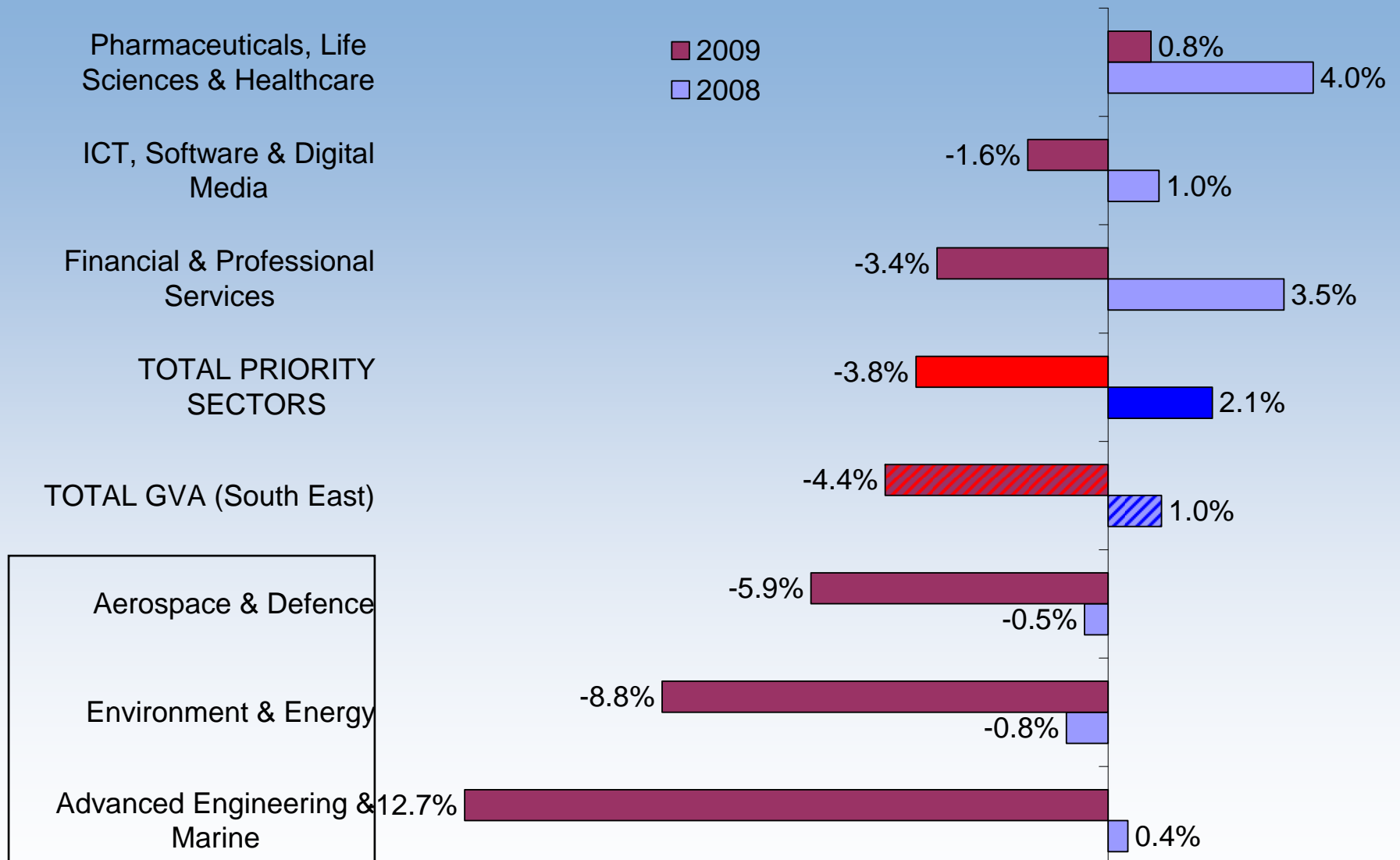
Priority Sectors - GVA Growth (1997-2007)



- Advanced Engineering & Marine
- Pharmaceuticals, Life Sciences & Healthcare
- Aerospace & Defence

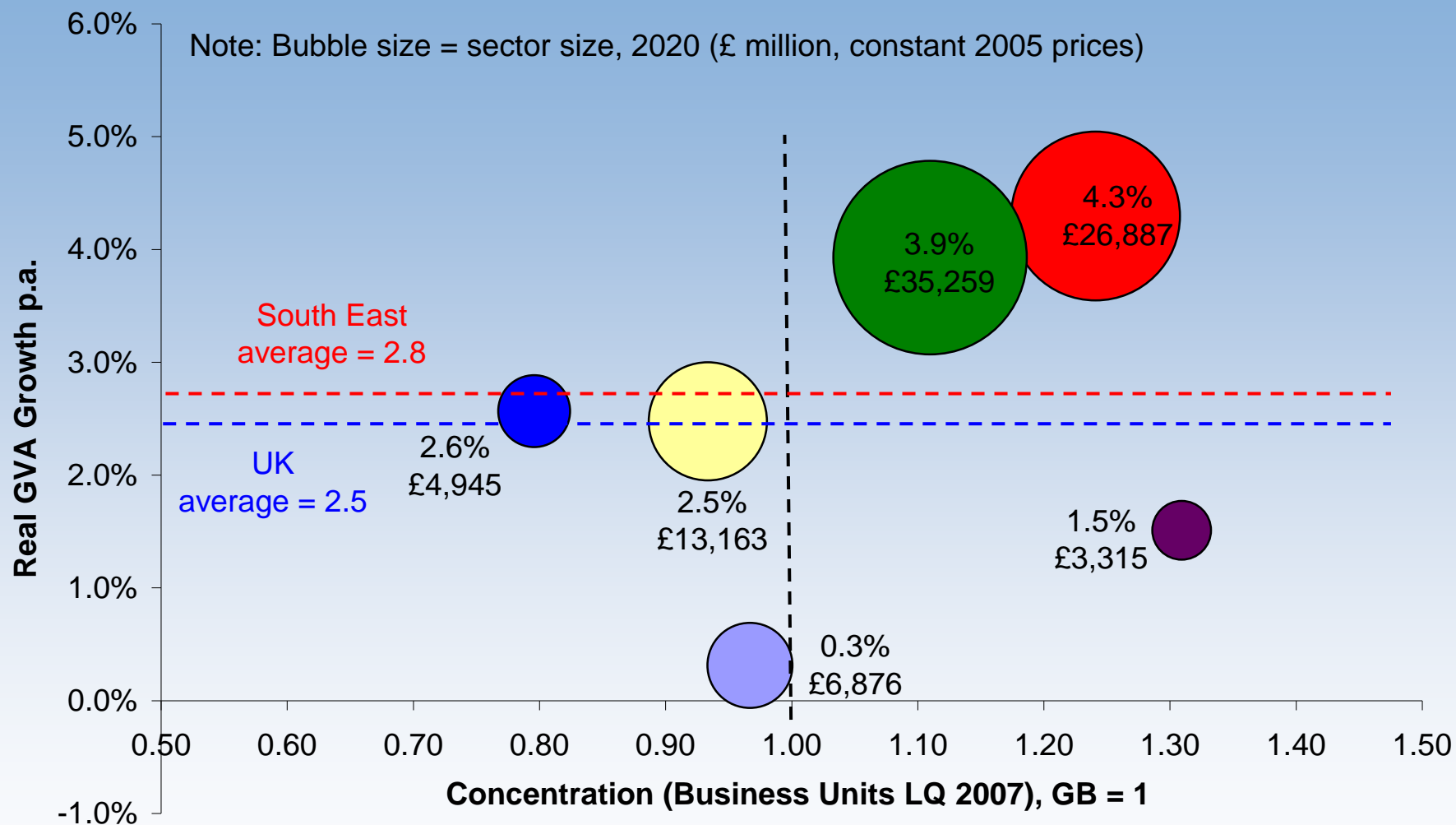
- ICT, Software & Digital Media
- Environment & Energy
- Financial & Professional Services

Priority Sectors - GVA Growth (2008 and 2009)



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Priority Sectors - Projected GVA Growth, (2010-2020)



● Advanced Engineering & Marine

○ Pharmaceuticals, Life Sciences & Healthcare

● Aerospace & Defence

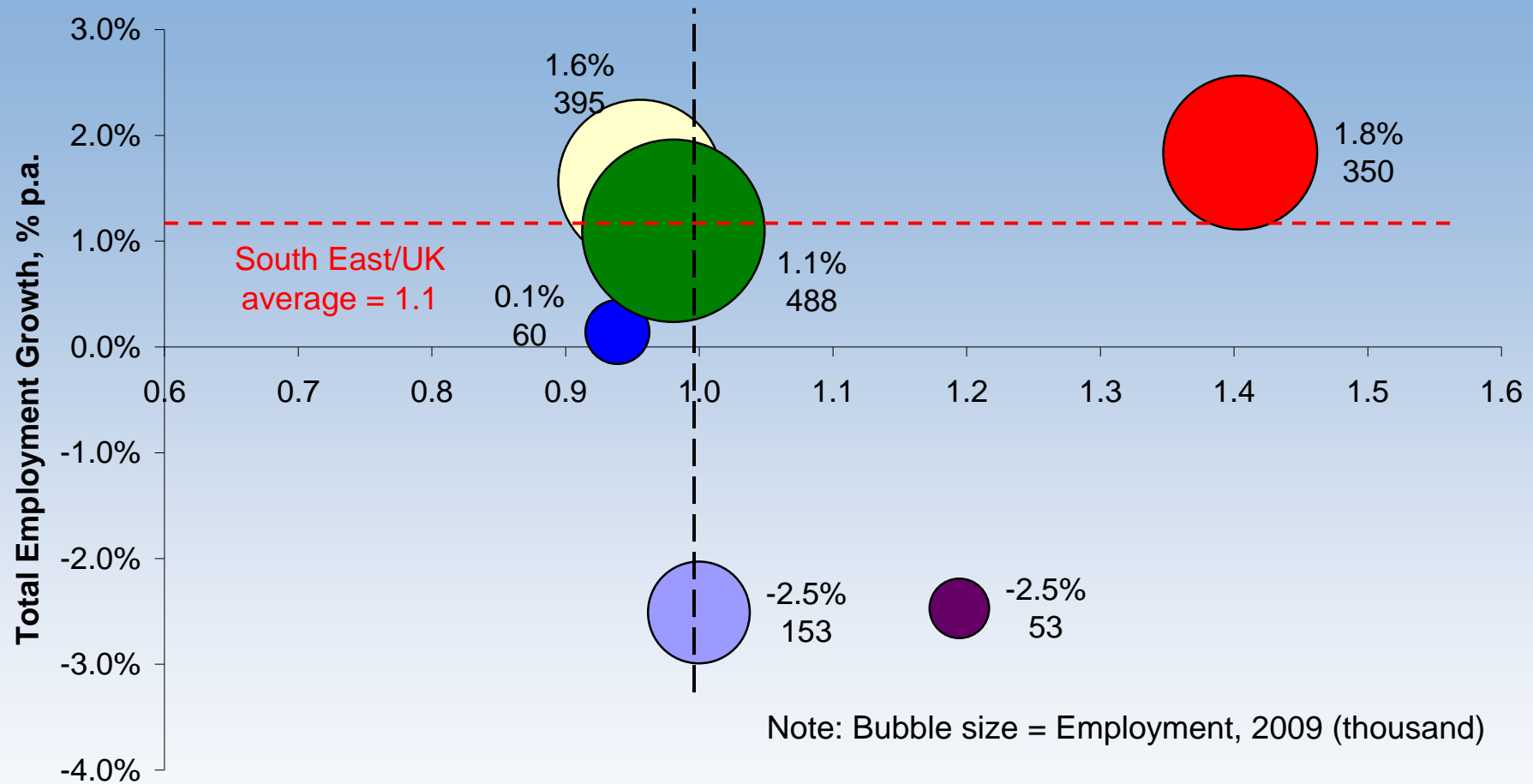
● ICT, Software & Digital Media

● Environment & Energy

● Financial & Professional Services

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Priority Sectors - Employment Growth (1997-2007)



Concentration (Employment LQ 2007), UK = 1

● Advanced Engineering & Marine

● Pharmaceuticals, Life Sciences & Healthcare

● Aerospace & Defence

● ICT, Software & Digital Media

● Environment & Energy

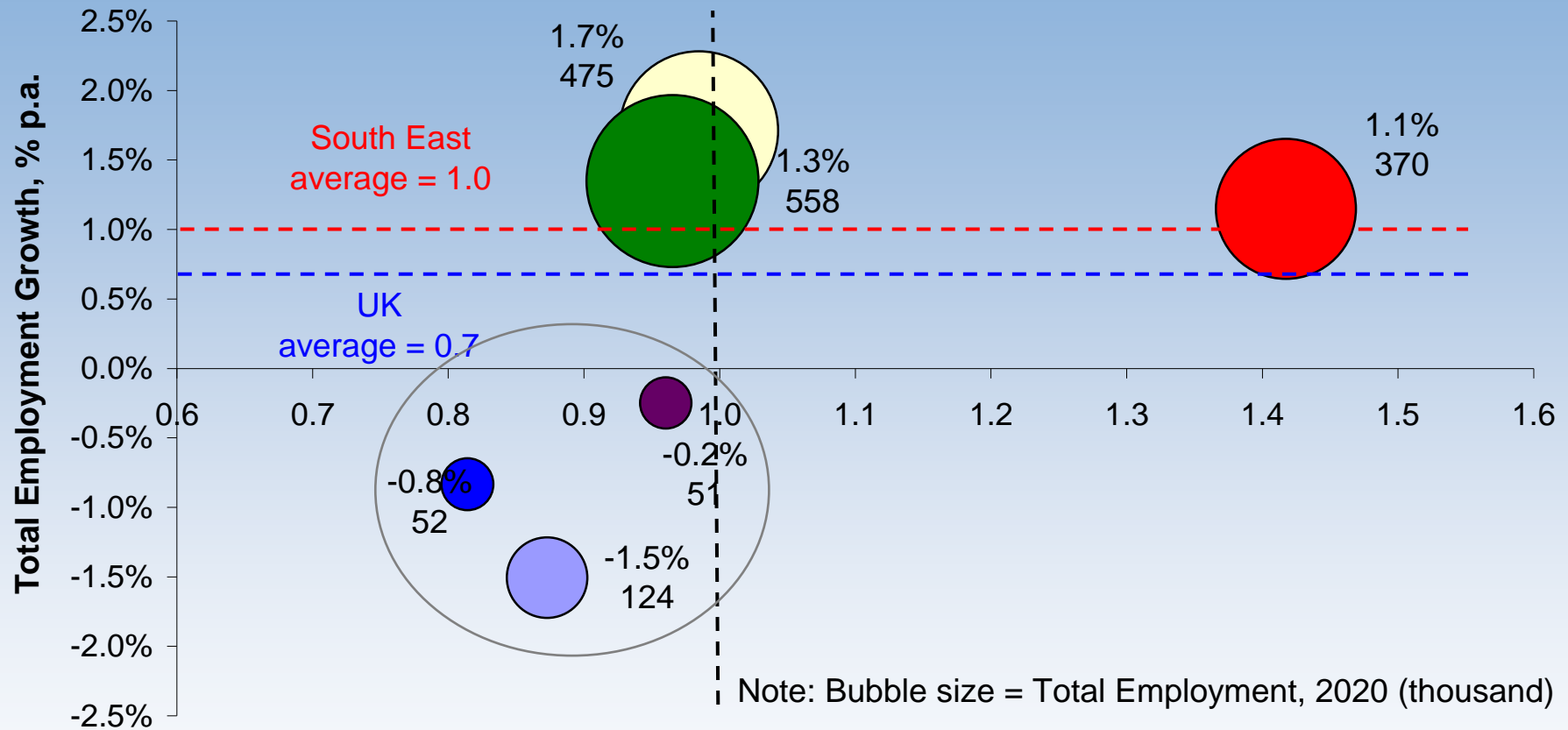
● Financial & Professional Services

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Priority Sectors - Projected Employment Growth, (2010-2020)



Concentration (Employment LQ 2020), UK = 1

- Advanced Engineering & Marine
- Pharmaceuticals, Life Sciences & Healthcare
- Aerospace & Defence

- ICT, Software & Digital Media
- Environment & Energy
- Financial & Professional Services

Stage 2

- Data Update
- Some sectors are too broad
- Gain better understanding of sub-sectors
- Cluster analysis
- Input from Sector Consortia, Sector Leads, etc.
- Qualitative Analysis

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Thank you

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