

Greater Lincolnshire Evidence Refresh

April 2025



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Economy

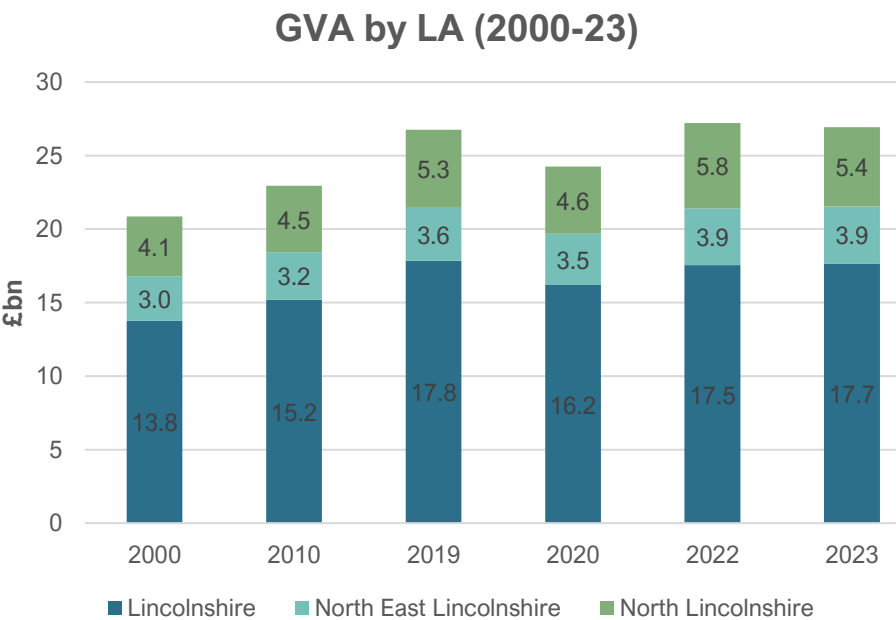
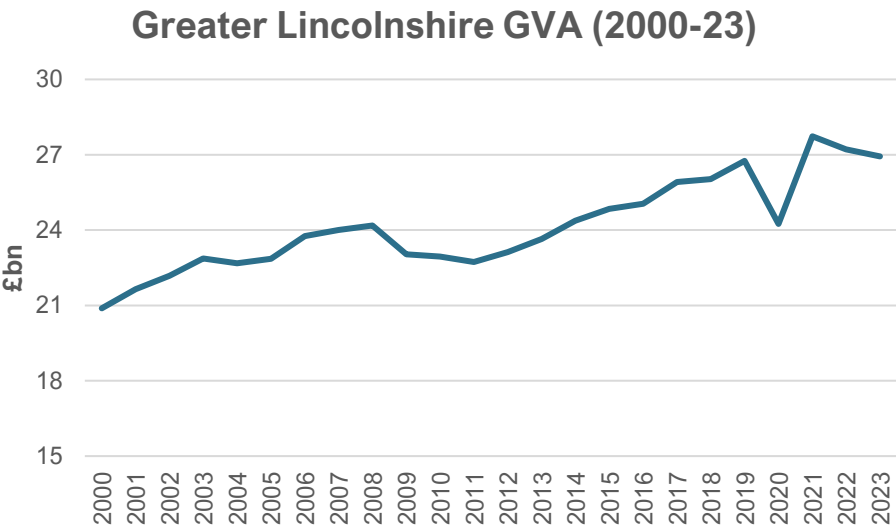
Economy headlines

- The economy bounced back from the Pandemic up to 2021, but has contracted between 2021 and 2023, countering trends seen regionally and nationally. Growth has averaged 1.2% per year since 2010, below 1.6% across Yorkshire and nationally.
- Productivity, using GVA per hour as a proxy, has grown more quickly in Greater Lincolnshire since 2010 than comparator areas, especially since 2020. However data are currently only available to 2022, and given updated GVA data has shown a decline in Greater Lincolnshire, these trends are subject to change.
 - The productivity gap has closed from 21.5% below the UK average in 2011 to 13% in 2019 and 8% in 2022. using GVA per hour.
 - Although GVA per hour remains below comparator CA areas, again the gap has closed particularly to Hull & East Yorkshire.
 - North and North East Lincolnshire is relatively productive – 7% above UK GVA per hour. However within Lincolnshire, the gap has not closed and remains well below UK productivity levels.
 - Using a different proxy for productivity, GVA per working age population, the gap had closed somewhat to the UK average up to 2021 across Greater Lincolnshire but has since opened up to 2023 with falling levels of GVA. North Lincolnshire is relatively productive using GVA per working age population.
- However total employment has remained relatively flat since 2019 having fallen between 2022 and 2023.
 - Amongst comparator areas, Greater Lincolnshire has seen lowest growth in total employment since 2015.
 - Jobs per working age resident in Greater Lincolnshire is slightly below regional comparators, with a bigger gap to the UK and York and North Yorkshire.
 - Within Greater Lincolnshire, jobs per working age resident is highest in North Lincolnshire, more in line with UK rate. However employment growth remains below comparator rates.
 - Employment in North East Lincolnshire is lower now than it was in 2015.
 - There has been employment growth in Lincolnshire, but below growth seen in comparator areas – jobs density has remained largely unchanged and is below comparator levels.
- The business base had been growing up to 2022 in Greater Lincolnshire before plateauing and falling by 2% over the last year.
 - Growth in Greater Lincolnshire was similar to other CA areas up to 2022 but the decline in business base has been stronger in Greater Lincolnshire.
 - Growth has been lower than regionally and nationally.
 - Within Greater Lincolnshire, the decline has been most pronounced in North East Lincolnshire, but all areas have seen slower growth compared to regionally and nationally.
- Business concentration is relatively low in Greater Lincolnshire, especially compared to York and North Yorkshire and UK average.
- The earnings gap has slightly closed in Greater Lincolnshire but earnings remain relatively low, especially in Lincolnshire.

Greater Lincolnshire economy

The economy has grown by an average of 1.1% per year since 2000.

- The economy has grown from £20.9bn in 2000 to £26.8bn in 2019 before the Pandemic had a substantial impact, causing a 9% contraction to the economy.
- The economy recovered in 2021 to £27.7bn – 3.7% above 2019 levels. However, the economy has contracted since by 3% to £26.9bn in 2023.
- Since 2010, the economy has grown slightly more quickly, by an average of 1.2% per year.
- Lincolnshire continues to make the largest contribution to the overall economy. The economy has grown by an average of 1.1% per year. Between 2022 and 2023, the economy grew by 0.7% but has yet to recover to pre pandemic levels.
- North Lincolnshire saw the fastest growth of 1.6% per year despite a contraction of 14% during the Pandemic between 2000 and 2022. But the economy has contracted by 11% since 2021, explaining the overall fall across Greater Lincolnshire.
- North East Lincolnshire’s economy is now 7.5% above where it was in 2019, with modest growth of 0.4% over the last year.



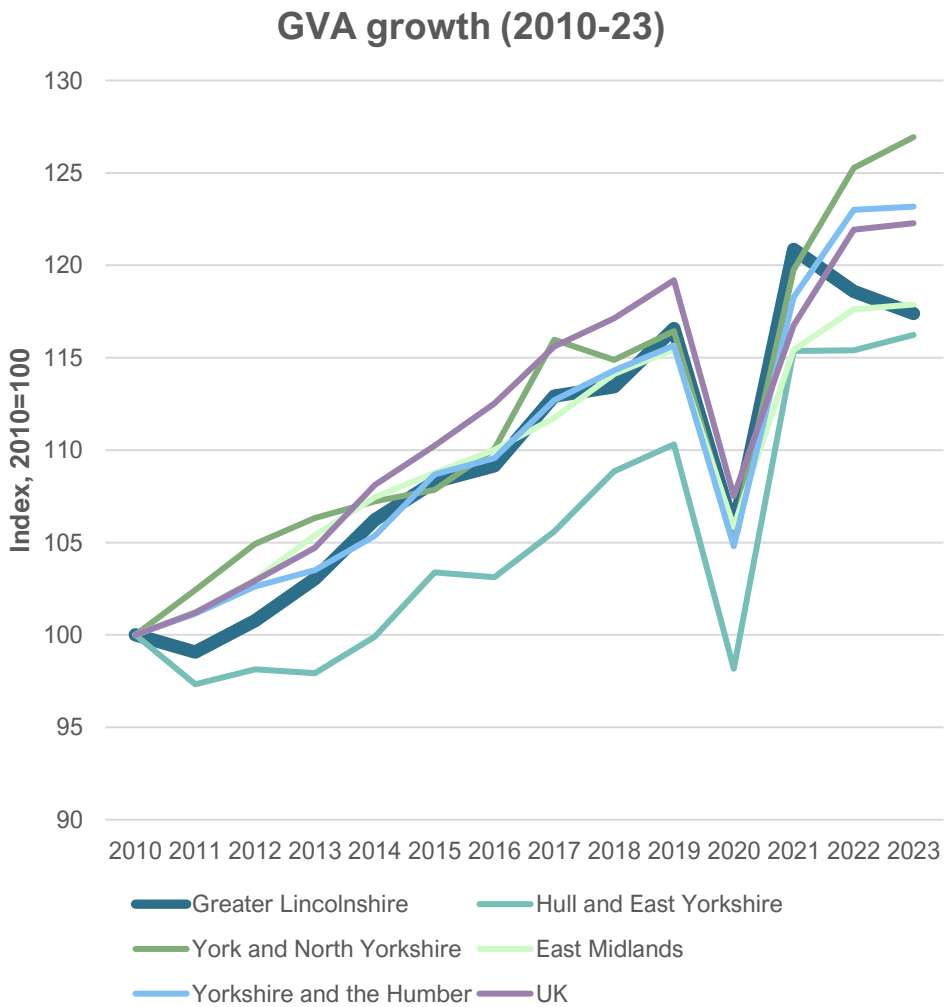
Source: ONS Regional Gross Added Value (balanced) by industry (2023)

Comparing economy growth

Greater Lincolnshire’s economy has grown more slowly than regional and national comparators after a recent slowdown.

- The chart shows how Greater Lincolnshire’s economy has grown since 2010, using indices based to 2010.
- Greater Lincolnshire’s economy consistently grew between 2011 to 2019 before being impacted by the Pandemic. The economy recovered and in 2021 was 21% bigger than in 2010, in line with many of the comparator areas.
- These trends are broadly in line with comparator areas, with respective economies growing up to 2019 before being impacted by the Pandemic, apart from Hull and East Yorkshire, where growth where the economy struggled to grow in the early 2010s before recovering somewhat.
 - All areas experienced a decline of between 8% and 11%, with Hull and East Yorkshire seeing the sharpest decline.
- However since 2021, the economy in Greater Lincolnshire has contracted, countering the trends seen in comparator areas. The economy has contracted by 3% since 2023.
- Greater Lincolnshire has seen amongst the lowest growth of comparator areas along with Hull and East Yorkshire where growth had been sluggish in the early 2010s. Since 2010, the economy has grown by an average of 1.2% compared to 1.6% across Yorkshire and the UK.
- York and North Yorkshire has seen the highest growth with the economy 27% larger in 2023 than it was in 2010.

Source: ONS Regional Gross Added Value (balanced) by industry (2023)



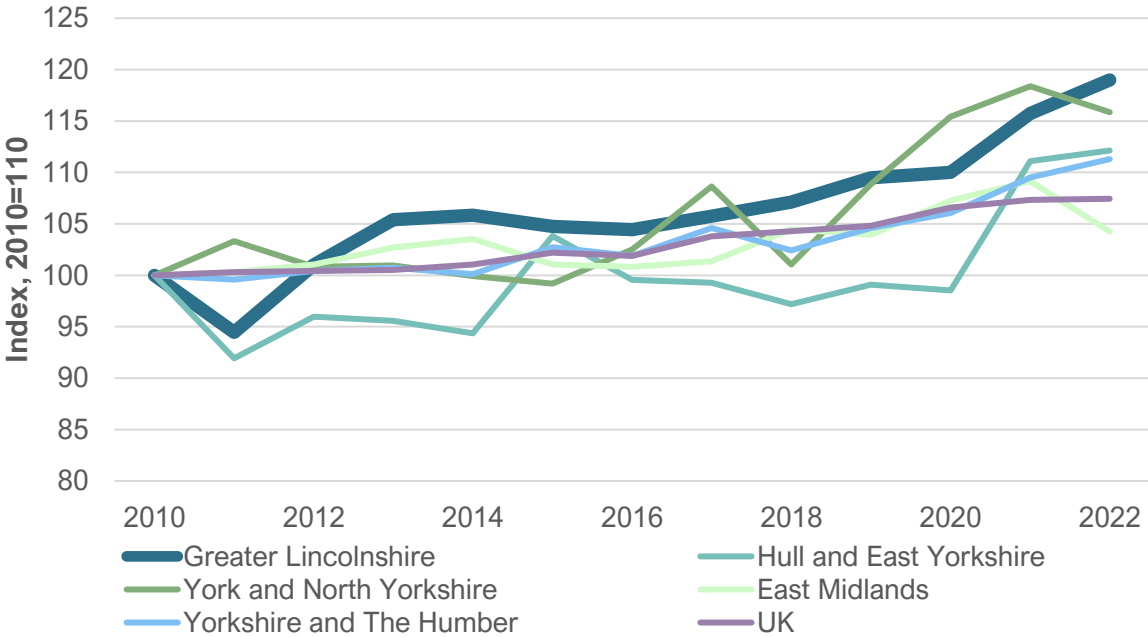
Productivity – GVA per hour

Greater Lincolnshire has started to close the productivity gap to the UK over recent years

- The chart shows how productivity as measured by GVA per hour, has changed since 2010.
- GVA per hour has grown most quickly in Greater Lincolnshire amongst comparator areas – in 2022 GVA per hour reached £34.18 in Greater Lincolnshire, 19% above where it was in 2010.
- Over this period, Greater Lincolnshire has closed the gap to the UK average from 21.5% in 2011, 13% in 2019 and down to 8% in 2022.
 - North and North East Lincolnshire is now 7% more productive than the UK average. Despite some progress in the early 2010s, Lincolnshire has not really closed the gap since 2019, and remains 14.5% less productive than the UK average.
- Greater Lincolnshire productivity is above both East Midlands and Yorkshire and the Humber averages, growing the respective gaps since 2019.
- Productivity in Greater Lincolnshire remains slightly below Hull and East Yorkshire and York and Yorkshire, but the gap has closed particularly to Hull and East Yorkshire.

Source: ONS Subregional productivity (2022)
Notes: Data are available at ITL3 level for GVA per hour, which is why North and North East Lincolnshire are combined

Growth in GVA per hour (2010-22)



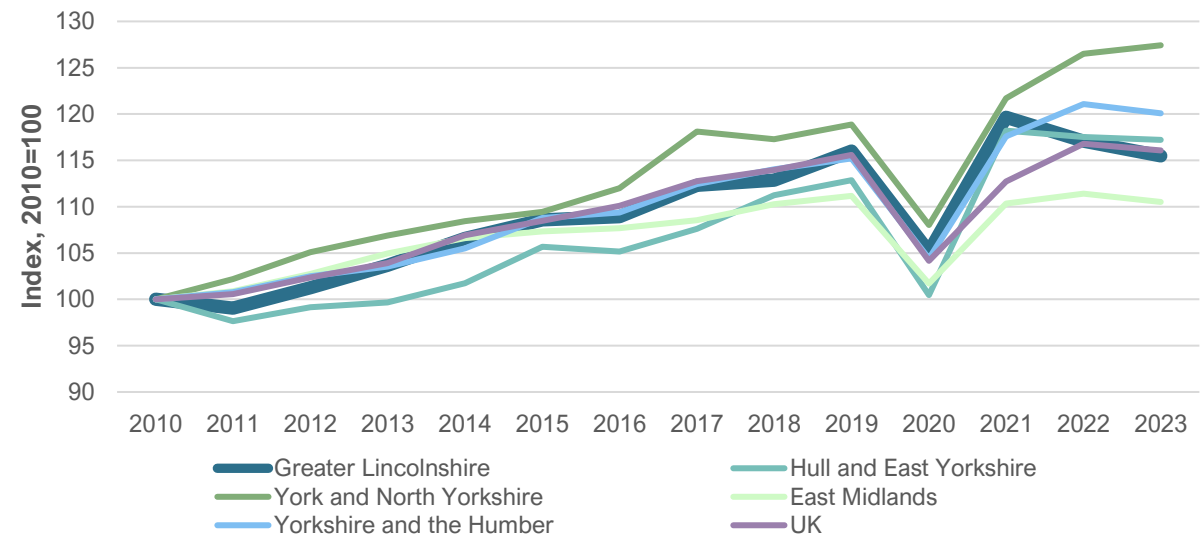
Area	2010	2019	2022
Greater Lincolnshire	£28.72	£31.45	£34.18
Hull and East Yorkshire	£30.73	£30.45	£34.46
York and North Yorkshire	£29.77	£32.41	£34.50
East Midlands	£29.82	£31.00	£31.09
Yorkshire and the Humber	£29.44	£30.80	£32.77
UK	£34.44	£36.10	£37.00
Lincolnshire	£27.54	£30.70	£31.65
North and North East Lincolnshire	£31.25	£33.00	£39.60

Productivity – GVA per working age population

- Using an alternative measure to proxy for productivity, GVA per working age population, shows that productivity remains below the UK average
- Amongst selected areas, growth in GVA per working age population in Greater Lincolnshire had been amongst the highest in 2021 of 20% - only York and North Yorkshire has seen higher growth of 22%.
- The gap had closed somewhat to the UK average up to 2021 from 23% below the UK average in 2010 to 18% below in 2021, but has opened again with a fall in GVA levels. In 2023, GVA per working age population of £40,741 was 23% below the UK average, the same difference as was the case in 2010.
- However growth between 2010 and 2023 is only in line with the UK average, meaning the productivity gap has not closed using GVA per working age population and remains £13,000 below the UK average, and the gap has grown to the Yorkshire average.
- Gains had been pronounced in North and North East Lincolnshire, growing by over 33% up to 2021 before falls in GVA. However since 2010, GVA per working age population has increased by 25% in North Lincolnshire and 28% in North East Lincolnshire – relatively high compared to comparator areas. North Lincolnshire is relatively productive – above UK productivity levels
- Lincolnshire has seen relatively low productivity growth of 11% since 2023 and productivity remains relatively low.

Source: ONS Regional Gross Added Value (balanced) by industry (2023); ONS Population Estimates

Growth in GVA per working age population (2010-23)



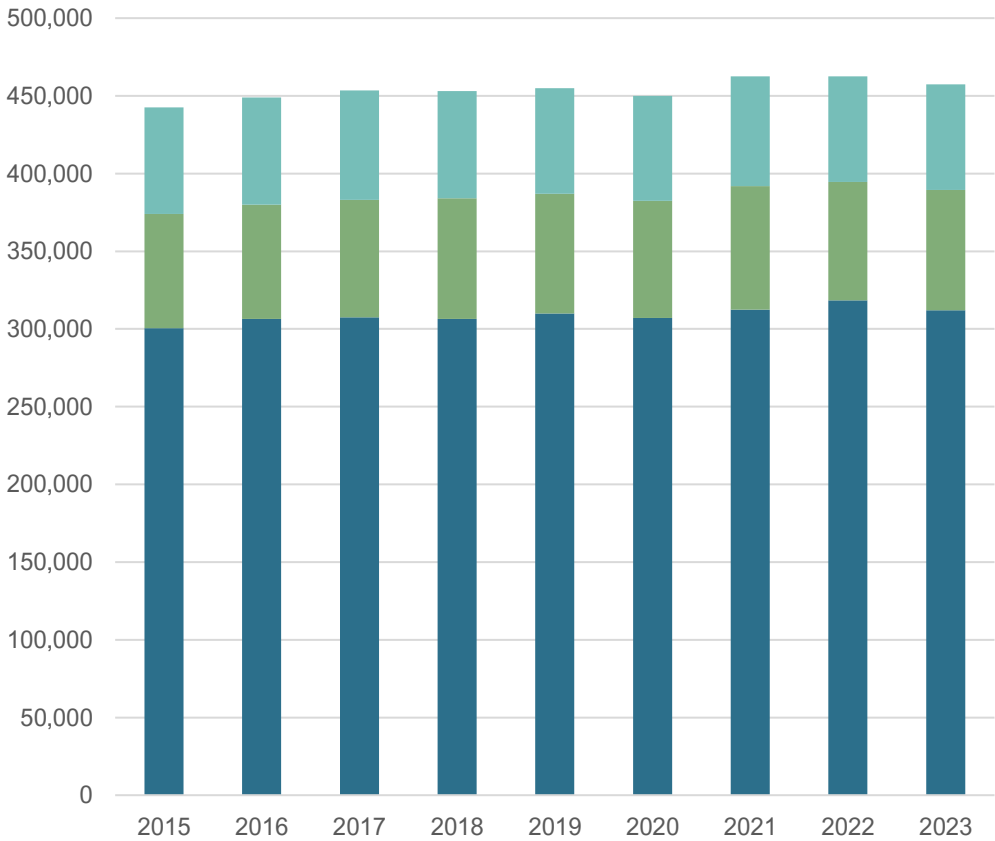
Area	2010	2019	2023
Greater Lincolnshire	£35,274	£40,916	£40,741
Hull and East Yorkshire	£34,997	£39,492	£41,025
York and North Yorkshire	£40,756	£48,445	£51,931
East Midlands	£37,486	£41,672	£41,423
Yorkshire and the Humber	£36,072	£41,561	£43,313
UK	£45,686	£52,802	£53,024
Lincolnshire	£34,225	£39,206	£37,965
North East Lincolnshire	£31,963	£37,689	£40,767
North Lincolnshire	£42,746	£51,436	£53,472

Change in employment in Greater Lincolnshire

Employment has recovered since the pandemic but has fallen over the last year

- Between 2015 and 2019, total employment rose by 2.7% across Greater Lincolnshire to 455,000. Employment fell by 1% across Greater Lincolnshire to 450,500 following the pandemic. Employment recovered strongly in 2021 to 462,500 but has since fallen slightly by 1.2% over the last year to 457,000 in 2023.
- Lincolnshire has consistently made up two thirds of total employment. Employment rose by 3.2% between 2015 and 2019, before falling 1% during the Pandemic. Employment reached 318,500 in Lincolnshire in 2022 before falling by 2.0%.
- North Lincolnshire has consistently made up around 17% of total employment. North Lincolnshire saw the largest rise of 4.8% between 2015 and 2019 before falling by 2% during the pandemic. Having recovered in 2021 before falling again between 2021 and 2022, employment has risen over the last year by 2.0% to 2023.
- North East Lincolnshire makes up 15% of total employment. Employment fell between 2015-19 by 0.7% and contracted again during the Pandemic. Employment has not changed over the last year and overall, is slightly down on levels in 2015.
- Taking the period 2019-23 across Greater Lincolnshire, employment has remained broadly flat, only increasing by 0.4%

Total employment in Greater Lincolnshire (2015-23)



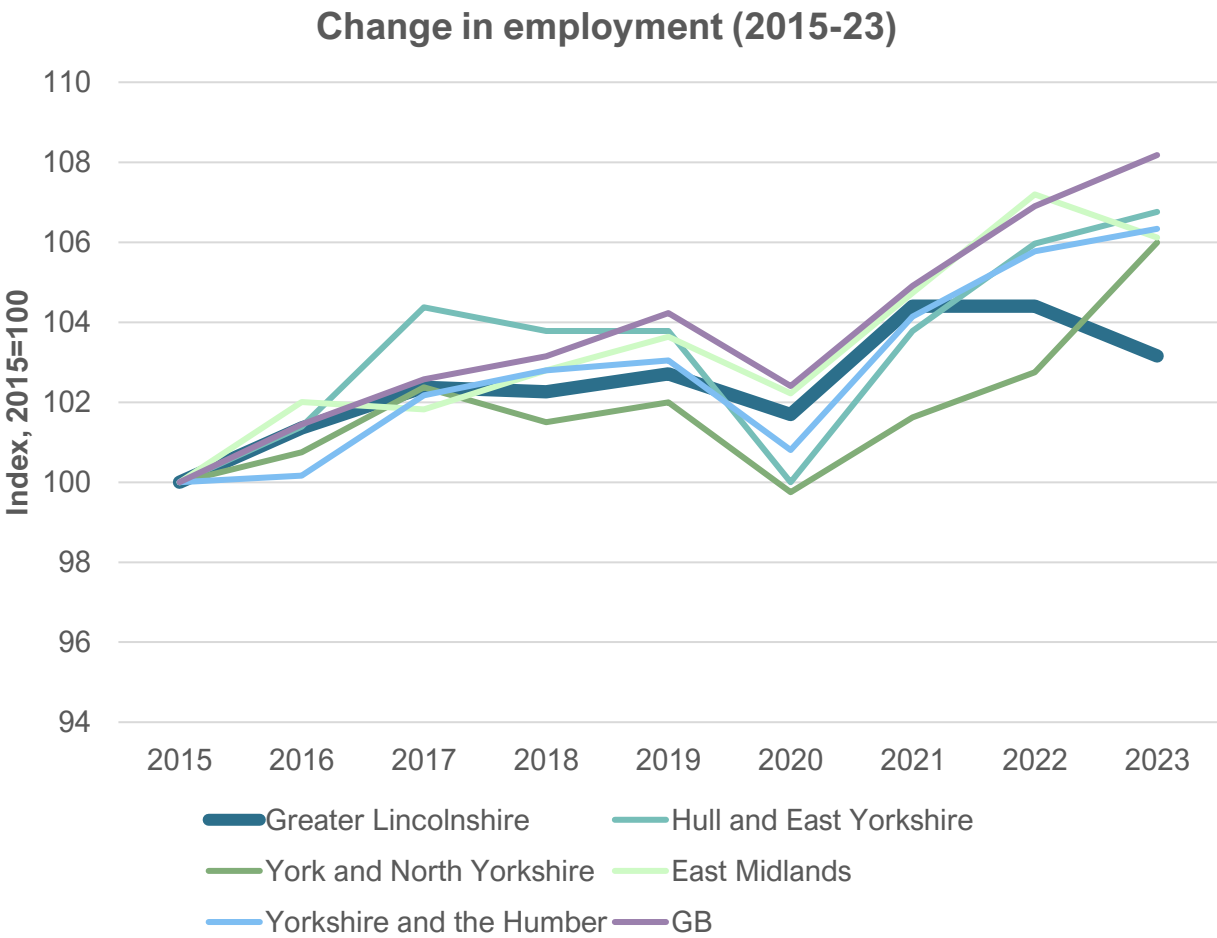
Source: ONS Business Register and Employment Survey (2023)

Change in employment

Greater Lincolnshire has seen the lowest increase in employment, remaining broadly unchanged since 2019

- Total employment has risen by 3.2% since 2015 in Greater Lincolnshire, but has only increased by 0.4% between 2019 and 2023. This does include the Pandemic but employment also fell by 1.2% over the last year.
 - Most comparator areas have seen growth of between 6-7%, although all remain below 8% across GB.
- Up to 2021, employment growth was broadly in line with comparator areas, and above York and North Yorkshire but employment growth in Greater Lincolnshire has since fallen below comparator areas.
- The only other area which saw a fall in employment between 2022 and 2023 was the East Midlands, but employment growth of 6% between 2015 and 2023 remains much higher than in Greater Lincolnshire.
 - York and North Yorkshire has countered these trends, and has seen significant employment growth post Pandemic.
- Total employment in North East Lincolnshire in 2023 is now below where it was in 2015.
- North Lincolnshire and Lincolnshire have seen growth of 5.4% and 3.8% growth respectively between 2015 and 2023, but this is below growth in comparator areas.

Source: ONS Business Register and Employment Survey (2023)

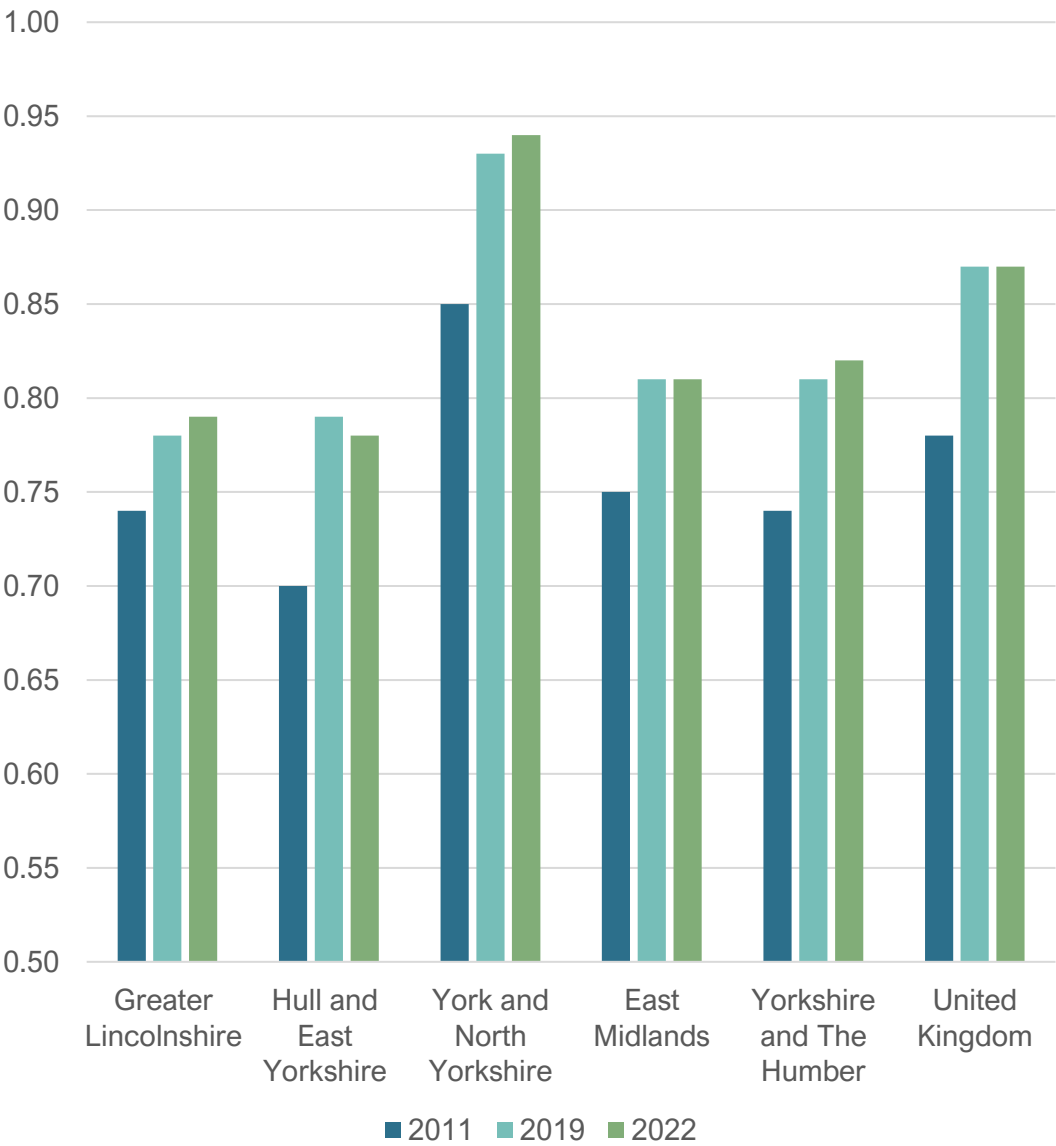


Jobs density

Greater Lincolnshire has a growing number of jobs per working age resident since 2011, although this remains below the UK rate

- *Jobs density refers to the number of jobs per resident aged 16-64. Typically areas have less than 1 job per working age resident. In 2022, only 29 county/unitary authorities had a jobs density of 1 or above, 13% of all county/unitary authorities.*
- The chart to the right shows how jobs density has changed since 2011 in Greater Lincolnshire and comparator areas.
- Jobs density increased from 0.74 to 0.79 between 2011 and 2022 in Greater Lincolnshire.
- Jobs density remained pretty much unchanged between 2019 and 2022 in Greater Lincolnshire, similar to most comparator areas.
- Jobs per working age resident in Greater Lincolnshire is slightly below regional comparators, with a bigger gap to the UK and York and North Yorkshire.
- North Lincolnshire has seen strong growth from 0.71 to 0.88 in 2021 before a slight fall to 0.85, which remains the highest number of jobs per working age across Greater Lincolnshire. North East Lincolnshire saw growth from 0.73 in 2011 to 0.83 in 2021 before a fall to 0.79 in 2022. Jobs density has remained broadly flat in Lincolnshire – 0.77 in 2022.

Jobs Density (2011, 2019, 2022)

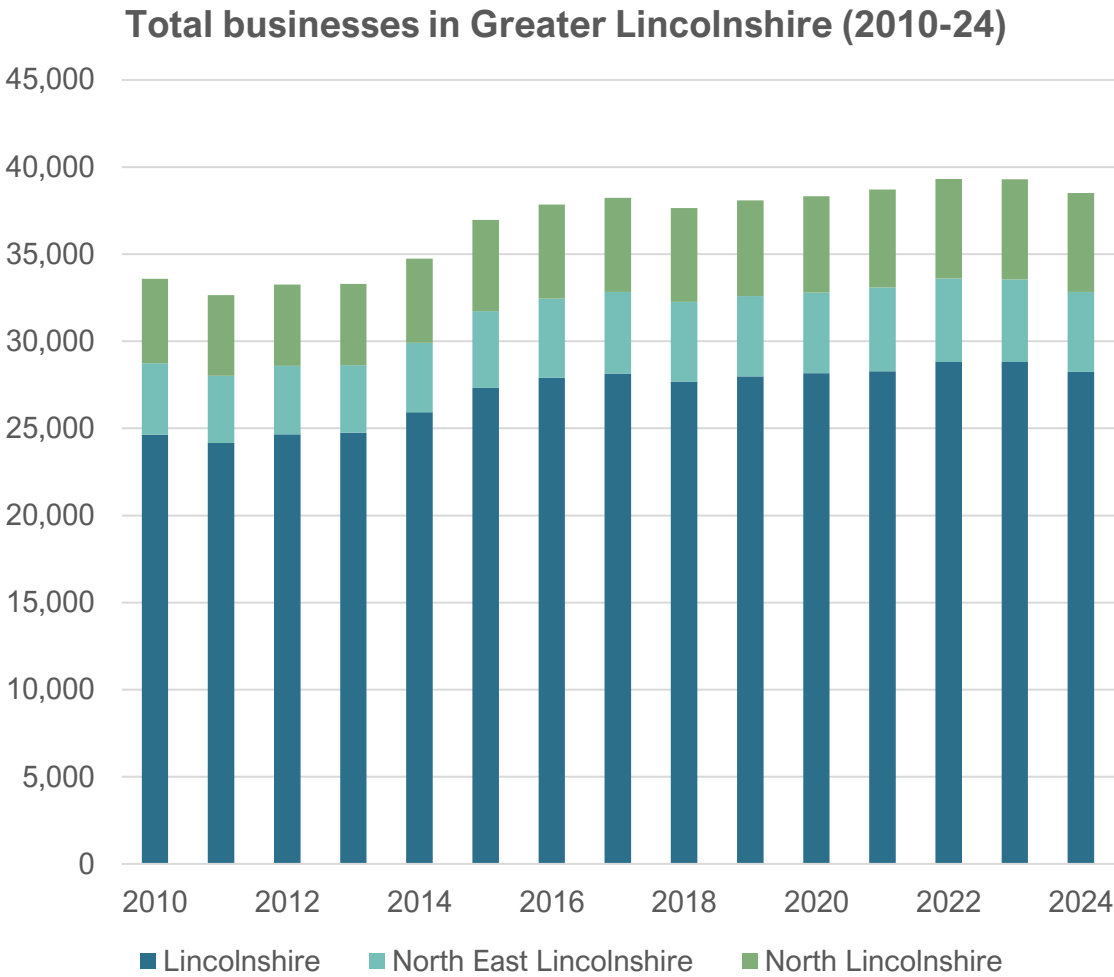


Source: ONS Jobs Density (2022)

Business growth

The business base has grown by 14% since 2010 but has shrunk slightly over recent years

- The business base in Greater Lincolnshire had grown since 2011 from 32,645 to 39,310 to 2022, an increase of 17%.
- But since the business base has shrunk, particularly over the last year with 38,505 businesses in 2024, down by 2%.
- Lincolnshire makes up around three quarters of the total business base and largely follows the overall trends seen in Greater Lincolnshire, with growth up to 2022 before a decline of 2% over the last year.
- North Lincolnshire makes up around 15% of total businesses. The business base has seen largest growth since 2010 of 17%, but again has seen a fall of 1.2% over the last year.
- North East Lincolnshire makes up around 12% of total businesses. Again, there had been growth from the early 2010s up to 2022 before a decline. North East Lincolnshire has seen the largest decline between 2023-24 of 3.3%.

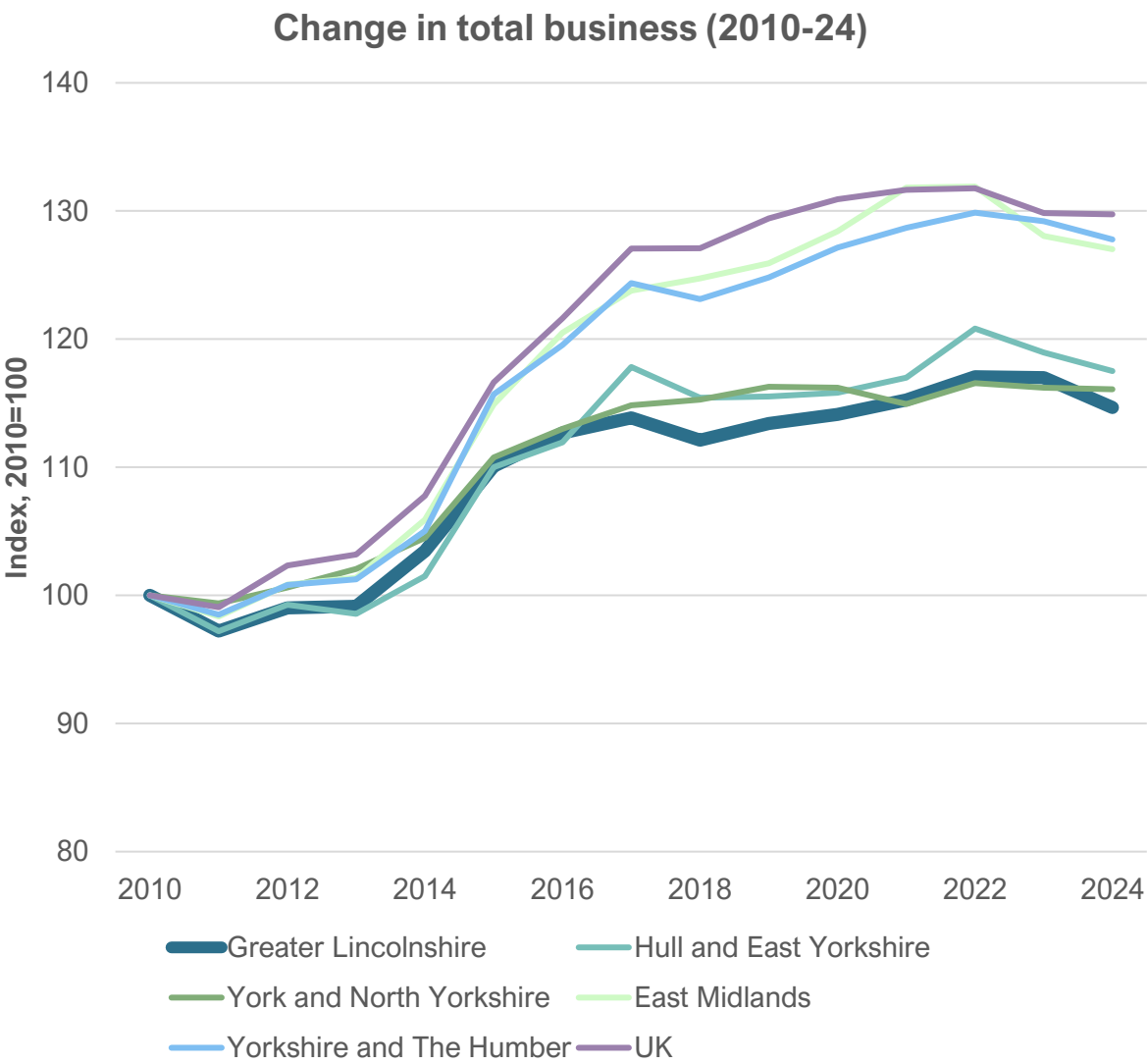


Source: ONS Business Counts (2024)

Change in businesses

Greater Lincolnshire has seen the lowest growth in business base since 2010

- CA areas broadly followed similar business growth trends up to 2022 of between 17-21%, before plateauing. The decline in Greater Lincolnshire over the last year of 2.0% has been greater than 1.2% in Hull and East Yorkshire, and in York and North Yorkshire where the business base remains largely unchanged.
- Growth has been stronger across the East Midlands, Yorkshire and the Humber and nationally – up to 2022, the respective businesses bases had grown by around 30%.
 - Across the East Midlands and Yorkshire and the Humber, total businesses fell by around 1%.
 - Across the UK, business numbers remained largely unchanged.
- Since 2010, Greater Lincolnshire has seen the smallest growth in total businesses, averaging 1%. Although this is similar to 1.1% in York and North Yorkshire and 1.2% in Hull and East Yorkshire, this is below 1.7%-1.9% against regional and national comparators.



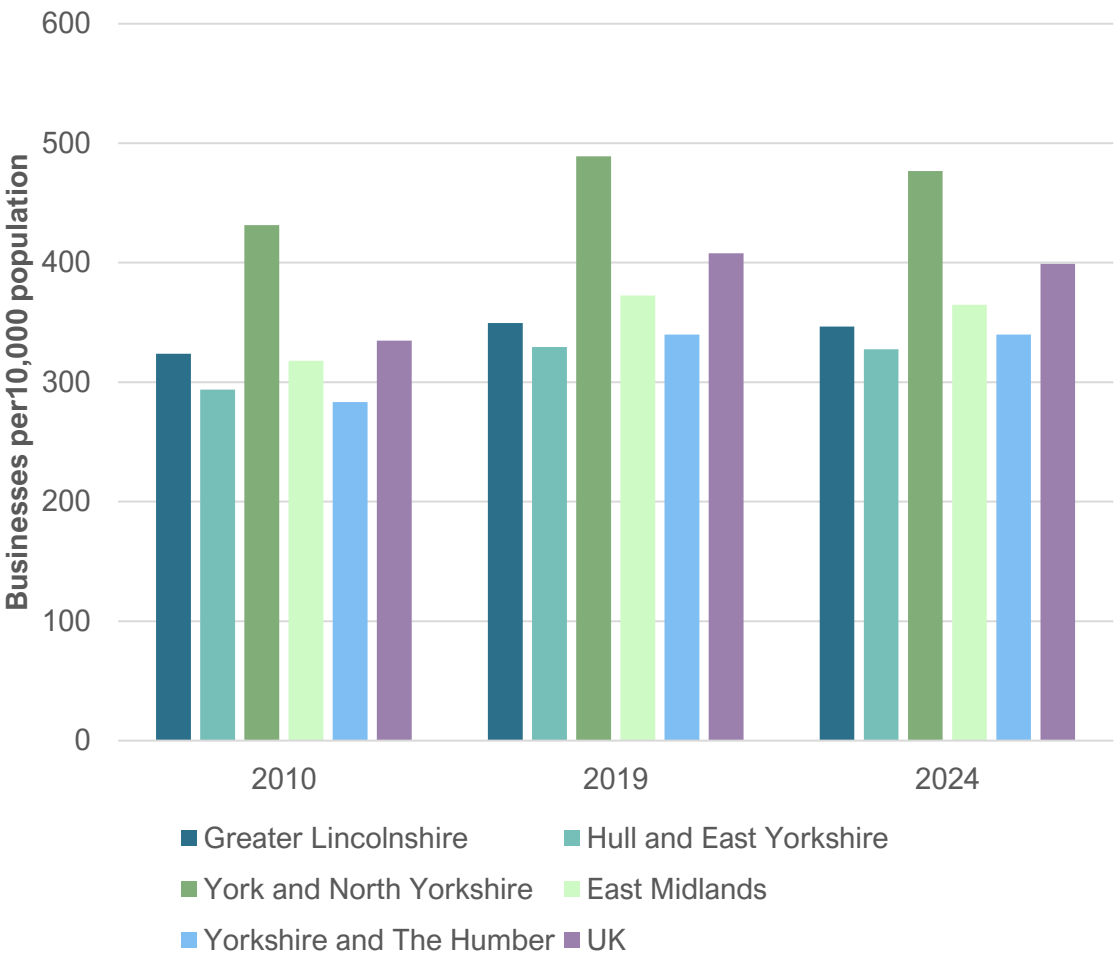
Source: ONS Business Counts (2024)

Businesses concentration

Greater Lincolnshire remains amongst the areas with the lowest number of businesses per 10,000 population

- Between 2010 and 2019, the number of businesses per 10,000 people increased by 324 to 350 in Greater Lincolnshire before falling back slightly to 347 in 2024.
- Business concentration remains higher than Hull and East Yorkshire and the Yorkshire average but the gap has closed over this period.
- East Midlands now has a higher number of businesses per 10,000 people than Greater Lincolnshire (347 vs 365 in East Midlands).
- York and North Yorkshire has consistently had the highest business concentration and this remains the case, although the gap has closed compared to the UK average.
- Greater Lincolnshire has 50 less businesses per 10,000 population compared to the UK average and 130 less than York and North Yorkshire.
- Lincolnshire has the highest business concentration within Greater Lincolnshire, growing from 346 in 2010 to 361 in 2024. Both North Lincolnshire and North East Lincolnshire have seen strong increases, although business concentration remains relatively low.
 - North Lincolnshire (291 to 333) and North East Lincolnshire (257 to 290).

Businesses per 10,000 population (2010, 2019 and 2024)



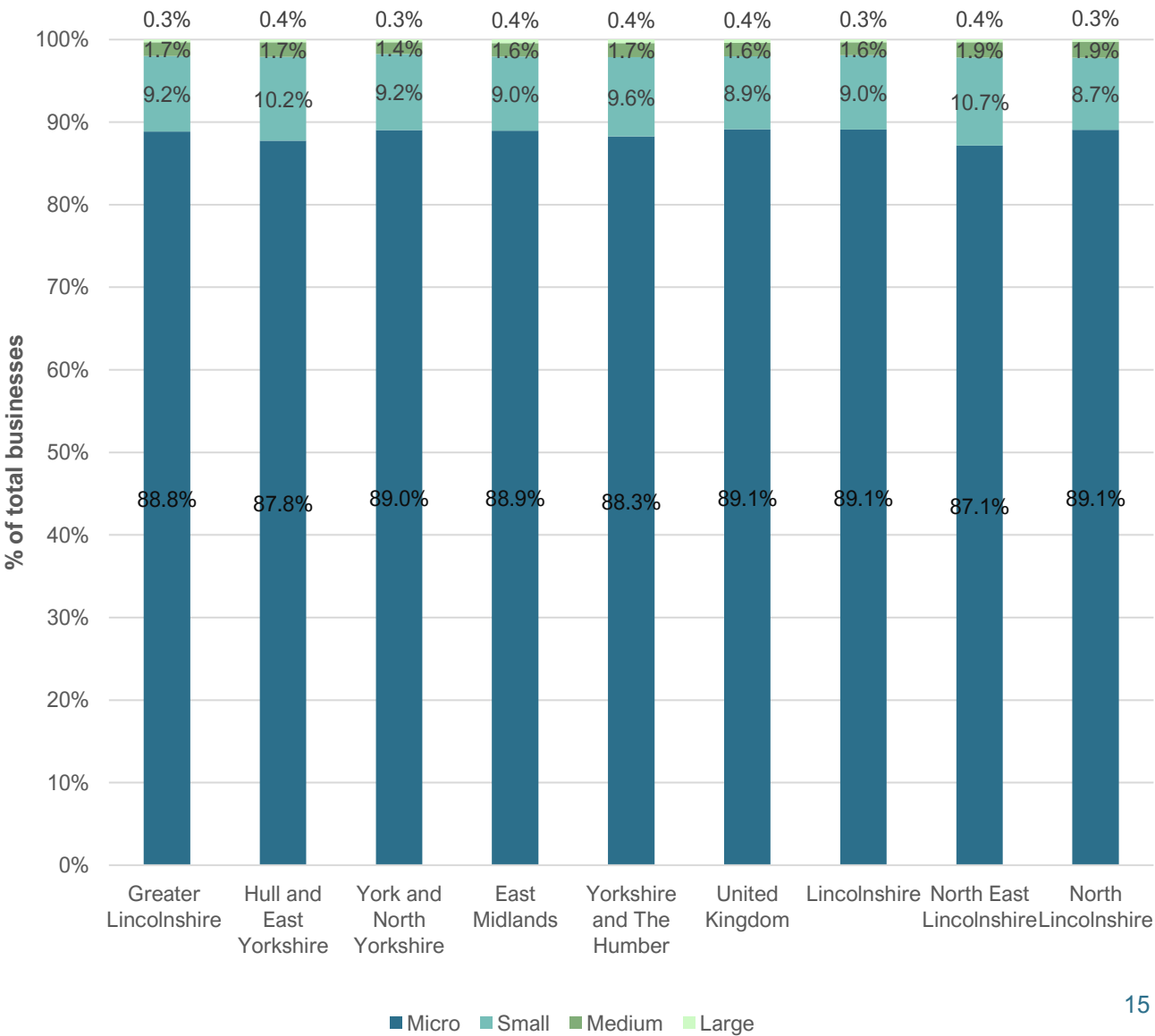
Source: ONS Business Counts (2024); ONS Population Estimates

Business composition

Business composition is very similar across comparator areas and has not changed significantly in Greater Lincolnshire

- The chart shows how the size of business varies across comparator areas.
- Since 2010, there has been a slight increase in the proportion of the business base made up by micro businesses in Greater Lincolnshire, offset by a fall in the proportion of small businesses, but Greater Lincolnshire’s business composition is in line with comparator areas.
- The only difference is Hull and East Yorkshire where there is a slightly higher proportion of small businesses.
- Within Greater Lincolnshire, North East Lincolnshire has a slightly higher proportion of small and medium businesses. In North Lincolnshire, the proportion of medium businesses is also slightly higher than compared to comparator areas.

Business composition (2024)



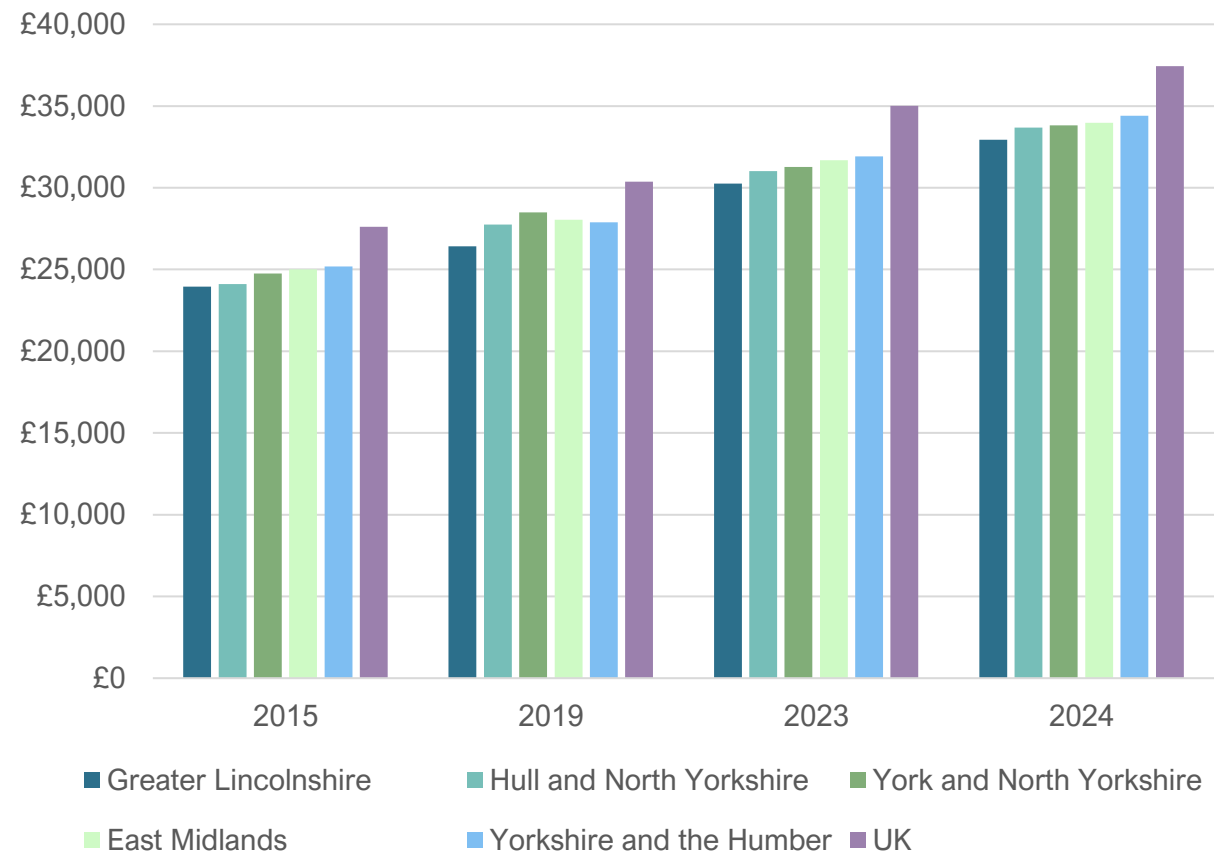
Source: ONS Business Counts (2024)

Workplace earnings

The earnings gap has slightly closed in Greater Lincolnshire but earnings remain relatively low

- Workplace earnings rose by 2.5% per year between 2015-19 in Greater Lincolnshire, below CA comparators but in line with the UK average.
- Between 2019-24, earnings have risen by 4.5% per year, above CA comparators, and similar to 4.3% increase across the UK.
- Over the last year, it is estimated that workplace earnings rose by around 9% in Greater Lincolnshire, similar to comparator CA areas but above 7% rise nationally.
- As such the gap in workplace earnings has slightly fallen from 13% in 2019 to 12% in 2024. However, earnings remain between 2%-4% below CA and regional comparators
- Earnings are highest in North East Lincolnshire of £34,509, where earnings have risen by 6.4% on average between 2019-24.
- Earnings are very similar in North Lincolnshire of £34,480 – earnings growth was slow in the run up to 2019 but have risen on average by 3.6% since 2019.
- Lincolnshire has seen growth in earnings since 2015 but earnings remain relatively low at £32,158 in 2024.

Annual workplace earnings (2015, 2019, 2023, 2024)



Area	2015	2019	2024
Greater Lincolnshire	£23,954	£26,426	£32,937
UK	£27,615	£30,378	£37,430
Lincolnshire	£22,990	£26,043	£32,158
North East Lincolnshire	£24,197	£25,321	£34,509
North Lincolnshire	£27,831	£28,944	£34,480

Source: ONS Annual Survey of Hours and Earnings (2024)
Notes: Earnings data are not reported at a Combined Authority level. Combined Authority earnings estimates have been calculated by weighting the total employment made up in respective Local Authorities.

Sectors

Sector headlines

Employment

- Wholesale & retail, health and manufacturing continue to make up a significant proportion of overall employment - combined these sectors account for nearly half of total employment.
 - Greater Lincolnshire has significantly more people employed in wholesale & retail and manufacturing than nationally despite slight falls since 2019. This is especially the case in manufacturing, which makes up almost double the proportion of employment compared to nationally.
 - Health has seen average growth in employment of over 3% - an increase of 9,000 in employment.
- Transport & storage and agriculture also have a significantly higher proportion of people employed in Greater Lincolnshire, despite a greater fall in employment in agriculture than compared to nationally.
- Professional, scientific and technical, IT, and finance make up significantly less of total employment than compared to GB despite growth in the IT sector in Greater Lincolnshire.
- Despite growth in public admin and defence employment, the sector makes up slightly less employment than nationally, where employment has risen by 2.9% annually since 2019.
- Accommodation and food services has also seen strong growth of 3% annually in employment, this is above rise seen nationally.

Sector specialisms

- Agriculture, public admin & defence, manufacturing, and transport come out as sector specialisms in Greater Lincolnshire using location quotient analysis, especially agriculture which is over twice as specialised as nationally.
- Lack of employment comes out strongly with low LQs in finance, IT and professional, scientific and technical sectors.
- Construction is somewhat specialised – the sector makes up over 15% of total businesses with strong growth and 5% of total employment.

Value of sectors

- Manufacturing accounts for nearly a fifth of the total economy, well above 9% contribution across the UK.
- Agriculture is another sector making a relatively large contribution to the economy (5.4% vs 0.9% nationally), with strong growth in GVA.
- Transport saw a fall in GVA – this sector is one of most exposed to impacts from the Pandemic, with data covering 2018-23, the sector may still be recovering from disruption. The sector accounts for 3.7% of the economy, similar to nationally.
- Wholesale & retail a significant contributor at 13%, although GVA has fallen between 2018-23 following national trends
- Relatively low contributions from professional, scientific and technical, IT and finance sectors.

Sector headlines

Business

- Business base is broadly in line with the UK with agriculture, transport, professional, and IT notable exceptions.
- Agriculture makes up a significantly higher proportion of businesses compared to nationally (9.8% vs 5.2%) despite a fall since 2019.
- Transport is another with a relatively higher number of businesses despite a fall (7.1% vs 4.3%).
- Manufacturing also has a relatively high number of businesses, remaining fairly constant since 2019 (5.7% vs 4.9%).
- Construction makes up over 15% of total businesses, slightly above UK levels, and has seen strong growth of over 2% annually.
- Professional, scientific and technical services account for a significant proportion of total businesses of 11% but makes a relatively small contribution to the economy.
- IT another sector where the proportion of businesses is relatively low (3% vs 6.9%).

Sector productivity

- Overall, GVA per employment across sectors remains below GB levels, but has increased to £59,000 in 2023, with the gap closing from 15% to 13% between 2015 and 2023. Although the gap has opened back up from 10% in 2021.
- Further evidence of sector strengths in agriculture where productivity is over

double the GB average; public admin & defence around a third more productive although productivity has fallen slightly over recent years; and manufacturing where the productivity gap has closed from 14% in 2015 to 5% in 2023, showing strong signs of progress.

- Transport is a significant employer but productivity has fallen particularly since 2021 in Greater Lincolnshire.
- Professional, scientific and technical, IT and finance sectors are all over a quarter less productive than nationally.
- Despite increasing employment in health productivity has fallen and is 12% below national levels.
- Productivity has increased in construction, with the sector making up a significant number of businesses, GVA and employment, although it remains 9% less productive using GVA per employment.

Clean Energy

- Overall, the clean energy sector is almost twice as specialised as it is nationally, with 511 businesses across Greater Lincolnshire.
- Energy generation is a relative strength, particularly in wind generation, unsurprising given offshore wind farm projects completed or in construction.
- Hydrogen has also emerged as a strength – this will be investigated further during the sector deep dive.

What this all means?

- The Local Industrial Strategy identified agri-food; ports & logistics; defence & security and energy as sector priorities. Manufacturing, health & social care and the visitor economy identified as wider sectors important to the economy.
- **From the evidence collected in the Refresh, priority sectors/sector strengths remain important for Greater Lincolnshire's economy. Below sets this out in a bit more detail:**
 - Manufacturing – by far the biggest contributor to the overall economy – making double the contribution compared to nationally. Employment has slightly fallen but this broadly follows national trends and accounts for almost double proportion of employment than nationally. The sector is over 1.5x as specialised as it is nationally and productivity has risen more quickly than nationally since 2015, closing the productivity gap from 14% to 5%. As seen on the Sector Growth Index, there has been some continued growth.
 - Agriculture – although employment has fallen by nearly 3% a year since 2019, the sector accounts for 3.5% of total employment, well over 1.4% nationally, and over twice as specialised as nationally. Agriculture makes up a significantly higher proportion of businesses compared to nationally (9.8% vs 5.2%) despite a fall since 2019 and makes a relatively large contribution to the economy (5.4% vs 0.9% nationally), with growing GVA compared to a decline nationally. Agri-food has seen some growth using the Sector Growth Index and agriculture remains far more productive than nationally.
 - Defence – public admin and defence is 1.75x as specialised than nationally. GVA has risen although and defence is around a third more productive than nationally. Public admin & defence employment increased by around 1.7% annually but this is below 3% rise nationally.
 - Ports & Logistics – 8.1% of total employment, above 6.4% nationally. The sector accounts for 10% of total businesses, over 6.6% nationally, and is over 1.4x as specialised as nationally however productivity has declined significantly since 2021 – currently a fifth below UK levels.
 - Using Data City, strengths in Clean Energy have been reaffirmed, particularly around offshore wind generation and emerging in hydrogen.
 - Health is one of largest employing sectors, above national levels but productivity has fallen and is 12% below national levels.
- Construction has seen strong growth in employment and business numbers, as shown by good performance in the Sector Growth Index. Productivity has increased somewhat but the sector remains 9% less productive compared to national levels.
- Hospitality remains an important part of the overall economy and has seen some growth in the Sector Growth Index. Wholesale & retail is the largest employing sector in the overall economy, and accommodation and food services has also seen strong growth in employment.
- However questions remain around the knowledge economy in Greater Lincolnshire and what role this will play in the future. Professional, scientific and technical, IT and finance sectors contribute a relatively low amount of employment, GVA and businesses compared to nationally, and all are at least a quarter less productive than compared to nationally. Using the Sector Growth Index, digital tech, life sciences and financial services & insurance all appears to be declining and remain at least a quarter below UK productivity levels.

Greater Lincolnshire sector employment

The table below shows sectors ordered highest to lowest by the proportion of total employment they make up in 2023. Wholesale & retail, health and manufacturing continue to make up a significant proportion of overall employment, especially health which has seen 9,000 more in employment since 2019 – combined these sectors account for nearly half of total employment. Strong growth in transport & storage, accommodation & food services, public admin defence and IT. Significant fall in admin and business services, making up 1.6% less of total employment since 2019. Agriculture, the arts and finance & insurance also experienced falls in employment.

Sector	Employment (2015)	Employment (2019)	Employment (2023)	% of employment (2019)	% of employment (2023)	% average change (2019-23)
Wholesale and retail trade; repair of motor vehicles and motorcycles	79,000	78,500	74,500	17.3%	16.3%	-1.3%
Health	57,000	58,500	67,500	12.9%	14.8%	3.6%
Manufacturing	63,500	64,000	62,500	14.1%	13.7%	-0.6%
Education	39,000	37,000	37,000	8.1%	8.1%	0.0%
Accommodation & food services	30,500	33,000	37,000	7.3%	8.1%	2.9%
Business administration & support services	37,000	37,000	29,500	8.1%	6.5%	-5.5%
Transport & storage (inc postal)	23,000	23,500	27,000	5.2%	5.9%	3.5%
Construction	25,000	24,000	24,000	5.3%	5.3%	0.0%
Professional, scientific & technical	19,500	22,500	22,000	4.9%	4.8%	-0.6%
Arts, entertainment, recreation & other services	16,000	20,500	19,500	4.5%	4.3%	-1.2%
Agriculture, forestry & fishing	16,500	18,000	16,000	4.0%	3.5%	-2.9%
Public administration & defence	14,500	14,500	15,500	3.2%	3.4%	1.7%
Property	5,500	7,000	8,000	1.5%	1.8%	3.4%
Information & communication	5,500	6,000	7,500	1.3%	1.6%	5.7%
Mining, quarrying & utilities	7,000	6,500	7,000	1.4%	1.5%	1.9%
Financial & insurance	4,750	3,750	3,000	0.8%	0.7%	-5.4%
Total	443,000	455,000	457,000			0.1%

Sector employment vs GB

Employment mix varies to nationally and more sectors than not are experiencing slower growth/bigger contraction compared to GB

- Two of three sectors which dominate overall employment – wholesale & retail and manufacturing, Greater Lincolnshire has significantly more people employed despite slight falls since 2019. This is especially the case in manufacturing, which makes up almost double the proportion of employment.
- Transport & storage and agriculture also have a significantly higher proportion of people employed in Greater Lincolnshire, despite a greater fall in agriculture than compared to nationally – this maintains strengths of employment in agri-food and ports and logistics.
- Professional, scientific and technical, IT, and finance make up significantly less of total employment than compared to GB despite growth in the IT sector in Greater Lincolnshire.
- Despite growth in public admin & defence employment, overall the sector makes up less employment than nationally, where employment has risen by 2.9% annually since 2019.
- The remaining sector employ fairly similar proportions to nationally.

Sector	GL (2023)	GB (2023)	GL % change (2019-23)	Above or below GB
Wholesale and retail trade; repair of motor vehicles and motorcycles	16.3%	13.6%	-1.3%	
Health	14.8%	13.6%	3.6%	
Manufacturing	13.7%	7.4%	-0.6%	
Education	8.1%	8.3%	0.0%	
Accommodation & food services	8.1%	7.9%	2.9%	
Business administration & support services	6.5%	8.5%	-5.5%	
Transport & storage (inc postal)	5.9%	4.9%	3.5%	
Construction	5.3%	4.9%	0.0%	
Professional, scientific & technical	4.8%	9.3%	-0.6%	
Arts, entertainment, recreation & other services	4.3%	4.6%	-1.2%	
Agriculture, forestry & fishing	3.5%	1.4%	-2.9%	
Public administration & defence	3.4%	4.6%	1.7%	
Property	1.8%	2.0%	3.4%	
Information & communication	1.6%	4.4%	5.7%	
Mining, quarrying & utilities	1.5%	1.2%	1.9%	
Financial & insurance	0.7%	3.3%	-5.4%	
Total			0.1%	

Source: ONS Business Register and Employment Survey (2023)
Notes: Above or below GB RAG rating – red signifies growth 0.5 percentage points below GB; amber within 0.5 percentage points of GB growth; green 0.5 percentage points above GB growth

Sector specialisms

Agriculture, public admin & defence, manufacturing, and transport come out as strongest sector specialisms in Greater Lincolnshire

- Location Quotients (LQs) are ratios between the local share of employment/business and share of employment/business in GB. Higher LQs correspond to higher levels of specialisation, with an LQ above 1 indicating that the area is more specialised in that sector than GB as a whole. A threshold of above 1.25 signifies the area has a significant specialism.
- Agriculture is over twice as specialised in Greater Lincolnshire than compared to GB, and public admin and defence almost 1.75x as specialised. This reiterates known strengths in agri food and defence.
- Manufacturing and transport are around 1.5x as specialised as nationally. Again this confirms known strengths in ports and logistics and manufacturing.
- Wholesale & retail, construction and accommodation and food services somewhat specialised.
- Lack of employment comes out strongly with low LQs in finance, IT and professional, scientific and technical sectors.

Sector	2015	2019	2023	Change (2019-23)
Agriculture, forestry & fishing	2.25	2.41	2.27	-0.14
Mining, quarrying & utilities	1.23	1.16	1.16	0.00
Manufacturing	1.45	1.48	1.51	0.03
Construction	1.16	1.08	1.10	0.02
Wholesale and retail trade; repair of motor vehicles and motorcycles	1.14	1.14	1.15	0.02
Transport & storage (inc postal)	1.67	1.45	1.42	-0.03
Accommodation & food services	1.03	1.05	1.06	0.01
Information & communication	0.35	0.35	0.39	0.03
Financial & insurance	0.45	0.45	0.42	-0.02
Property	0.71	0.81	0.83	0.02
Professional, scientific & technical	0.59	0.61	0.61	0.00
Business administration & support services	0.89	0.87	0.80	-0.07
Public administration & defence	1.67	1.79	1.74	-0.06
Education	1.02	1.00	0.96	-0.04
Health	0.94	0.97	0.98	0.02
Arts, entertainment, recreation & other services	0.84	0.96	0.92	-0.04

Source: ONS Business Register and Employment Survey (2023).
Note: The table displays the average employment and business LQs by sector

Value of sectors

Manufacturing accounts for nearly a fifth of the total economy, well above the 9% contribution across the UK

- In Greater Lincolnshire, manufacturing is by far the biggest contributing sector to the overall economy, making up 19% of total GVA, although GVA has declined more strongly than nationally since 2018.
- Agriculture is another sector making a relatively large contribution to the economy, with stronger growth in GVA compared to nationally.
- Wholesale & retail is another significant contributor, although GVA has decline following national trends
- Transport & storage has seen a fall in GVA, with the sector accounting for a similar proportion of GVA as nationally
- Public admin and defence saw a rise in GVA and contributes proportionately more to the economy than nationally
- Utilities has seen strong growth in GVA and the sector contributes over double the proportion nationally.
- Relatively low contributions from professional, scientific and technical, IT and finance sectors, although there has been growth in the IT sector.

Source: ONS Regional Gross Added Value (balanced) by industry (2023)

Broad sector group	GVA (2023) (£m)	Absolute change (2018-23) (£m)	GL % of total GVA (2023)	GB % of GVA (2023)	GL % change (2018-23)	GB % change (2018-23)
Manufacturing	5,007	-235	18.6%	9.2%	-0.9%	-0.1%
Real estate activities	3,382	181	12.6%	13.1%	1.1%	0.7%
Wholesale and retail trade; repair of motor vehicles	3,301	-271	12.3%	10.1%	-1.6%	-1.3%
Human health and social work activities	2,401	-374	8.9%	8.1%	-2.9%	-1.8%
Construction	1,910	199	7.1%	6.3%	2.2%	1.5%
Education	1,519	130	5.6%	6.3%	1.8%	3.1%
Public administration and defence	1,509	104	5.6%	5.1%	1.4%	2.2%
Agriculture, forestry and fishing; mining and quarrying	1,458	433	5.4%	0.9%	7.3%	1.4%
Electricity, gas, water; sewerage and waste management	1,439	469	5.3%	2.3%	8.2%	-0.9%
Administrative and support service activities	1,045	99	3.9%	5.4%	2.0%	1.9%
Transportation and storage	996	-90	3.7%	3.6%	-1.7%	-0.1%
Professional, scientific and technical activities	757	-12	2.8%	8.5%	-0.3%	2.9%
Accommodation and food service activities	726	-43	2.7%	2.8%	-1.1%	-1.2%
Arts, entertainment, recreation & other services	670	-23	2.5%	3.2%	-0.7%	-0.4%
Information and communication	408	60	1.5%	6.2%	3.2%	4.9%
Financial and insurance activities	404	-43	1.5%	9.0%	-2.0%	-0.6%
All industries	26,937				0.7%	0.9%

Businesses by sector

Business base is broadly in line with the UK with agriculture, transport, professional, scientific and technical activities and IT notable exceptions

- On the whole, most sectors have a similar proportion of businesses as compared to UK.
- Agriculture is one sector where is a significantly higher number of businesses compared to the UK despite a fall since 2019.
- Transport is another with a relatively high number of businesses despite a fall.
- Manufacturing also a relatively high number of businesses.
- Wholesale & retail and construction, there are a higher proportion of businesses in Greater Lincolnshire, although following similar trends to nationally.
- Professional, scientific and technical account for a significant proportion of total businesses of 11% but makes a relatively small contribution to the economy.
- IT another sector where proportion of businesses is relatively low.

Broad sector group	Businesses (2024)	GL % of total businesses	UK % of total businesses	GL% change (2019-24)	UK % change (2019-24)
Wholesale and retail trade; repair of motor vehicles and motorcycles	6165	16.0%	14.6%	0.4%	0.5%
Construction	5985	15.5%	14.0%	2.4%	2.0%
Professional, scientific & technical	4200	10.9%	15.3%	-0.9%	-2.4%
Agriculture, forestry & fishing	3780	9.8%	5.2%	-2.6%	-1.1%
Transport & storage (inc postal)	2730	7.1%	4.3%	-1.1%	1.0%
Accommodation & food services	2725	7.1%	6.4%	1.3%	2.0%
Business administration & support services	2620	6.8%	8.3%	0.2%	-0.2%
Arts, entertainment, recreation & other services	2380	6.2%	6.9%	1.0%	1.6%
Manufacturing	2210	5.7%	4.9%	-0.1%	-0.7%
Health	1410	3.7%	4.2%	1.3%	2.2%
Property	1345	3.5%	4.3%	3.2%	3.3%
Information & communication	1155	3.0%	6.9%	-2.0%	-3.7%
Education	655	1.7%	1.8%	0.3%	1.5%
Financial & insurance	585	1.5%	2.2%	1.1%	-0.6%
Public administration & defence	315	0.8%	0.3%	0.6%	0.9%
Mining, quarrying & utilities	245	0.6%	0.6%	0.8%	1.7%

Source: ONS Business Counts (2024)

Greater Lincolnshire sector productivity

- Overall, GVA per employment remains below GB levels, but the gap has closed over recent years from 15% to 13% between 2015 and 2023.
- Agriculture - GVA per employment is over double the GB average and growing far more quickly.
- Public admin & defence – GVA per employment almost a third higher than GB, although has fallen more significantly than GB levels over the last 5 years.
- Manufacturing productivity gap has closed from 14% in 2015 to 5% in 2023, showing strong signs of progress.
- Transport & storage – strong employer and relatively specialised but provisionally productivity has declined significantly since 2021 – currently a quarter below UK levels.
- Although making up a significant number of businesses and employment, construction is 9% less productive using GVA per employment but growing more quickly.
- Professional, scientific and technical, IT and finance sectors are all over a quarter less productive.

Sector	GVA (2023) (£m)	Employment (2023)	GVA per employment (2023)	Compared to GB	% change 2018-23	Compared to GB
Agriculture, forestry and fishing; mining and quarrying	£1,458	16,600	£87,831		9.1%	
Electricity, gas, water; sewerage and waste management	£1,439	6,250	£230,240		8.2%	
Manufacturing	£5,007	62,500	£80,112		0.5%	
Construction	£1,910	24,000	£79,583		0.9%	
Wholesale and retail trade; repair of motor vehicles	£3,301	74,500	£44,309		-1.4%	
Transportation and storage	£996	27,000	£36,889		-3.6%	
Accommodation and food service activities	£726	37,000	£19,622		-2.5%	
Information and communication	£408	7,500	£54,400		1.8%	
Financial and insurance activities	£404	3,000	£134,667		3.8%	
Real estate activities	£3,382	8,000	£422,750		-4.5%	
Professional, scientific and technical activities	£757	22,000	£34,409		-3.2%	
Administrative and support service activities	£1,045	29,500	£35,424		7.6%	
Public administration and defence	£1,509	15,500	£97,355		-0.6%	
Education	£1,519	37,000	£41,054		1.8%	
Human health and social work activities	£2,401	67,500	£35,570		-5.1%	
Arts, entertainment, recreation & other services	£670	19,500	£34,359		-1.2%	
All industries	£26,937	457,000	£58,943		0.5%	

Source: ONS Regional Gross Added Value (balanced) by industry (2023); ONS Business Register and Employment Survey (2023)

Rag rating for GVA per employment – red signifies 5% lower than GB average; green 5% above. For growth rates - red signifies growth 0.5 percentage points below GB; amber within 0.5 percentage points of GB growth; green 0.5 percentage points above GB growth

Sector Growth Index introduction

We have constructed an index aggregating five-year changes to employment, business counts, GVA, productivity and concentration (Location Quotients for employment and businesses) to help us assess how Greater Lincolnshire’s sectors have changed since the Local Industrial Strategy

- If a sector is seeing significant growth (>2% CAGR) in either employment, business counts, GVA and productivity (GVA per job)), it adds a score of 1.
 - The index also takes into account whether each sector is growing nationally. If the sector is growing significantly faster than the GB average (>7.5% difference), it adds a further 0.5 points.
- Average concentration is found by calculating the mean employment and business count Location Quotient (LQ). If average concentration has grown by more than 5% in one year, this adds a further 1 point to the overall score – as this already considers national trends, no additional points are added.
- The maximum score possible is 7 – meaning that a sector has seen growth across all measures, each of which is also growing faster than nationally.
- The lowest score is minus 7, meaning that a sector has felt a significant decline (< 2% CAGR) across all measures, and is declining faster than national averages.
- This analysis demonstrates the change that has happened in each sector, so does not reflect a sectors overall size, value or specialism.
- We have constructed bespoke sector definitions by classifying 5 digit SIC codes into broad sector groups as shown on the following slide, to see how sectors have changed in Greater Lincolnshire.

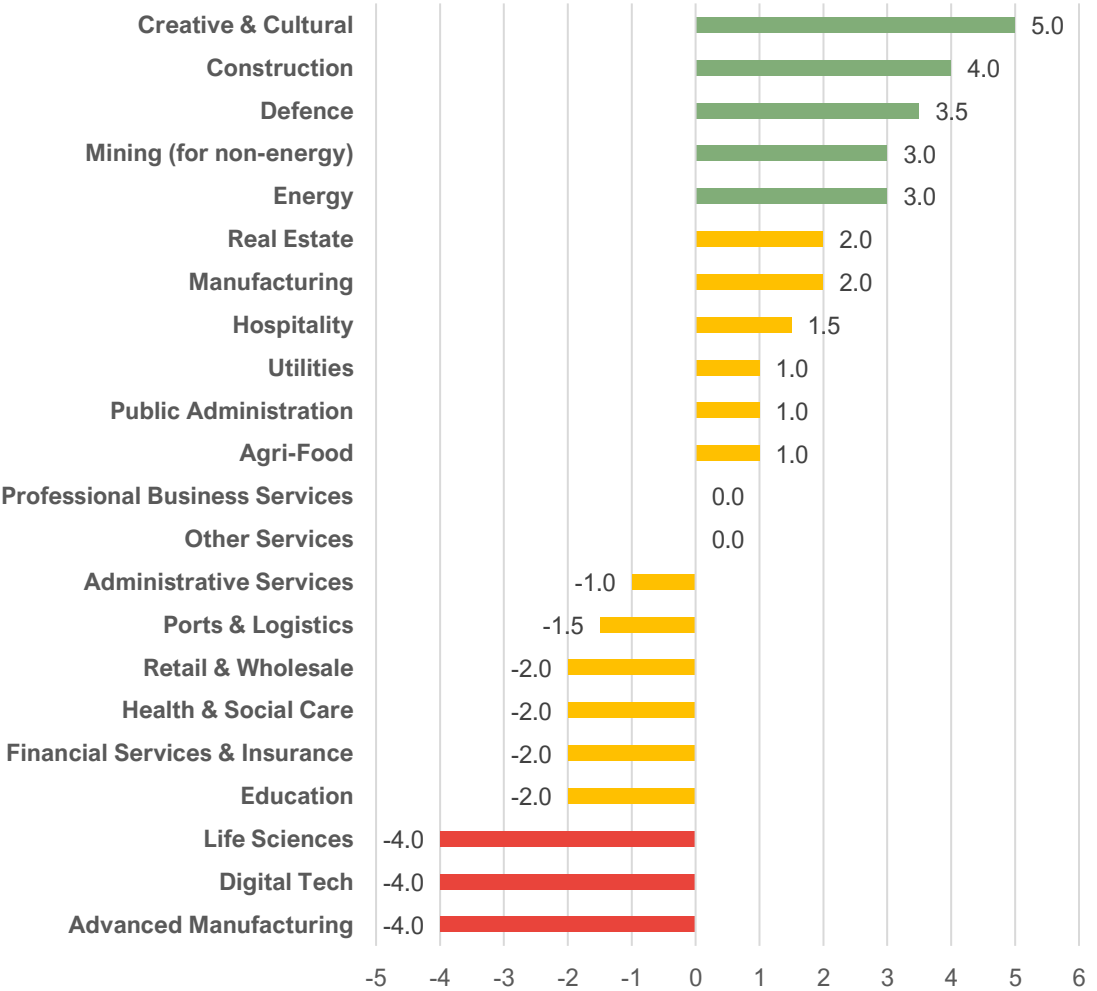
For each growth measure:

Condition	Score
Growing and faster than GB	1.5
Growing and equivalent to GB	1.0
Growing but slower than GB; or Static but GB declining	0.5
Static	0.0
Static but GB growing; or Declining but slower than GB	-0.5
Declining equivalent to GB	-1.0
Declining and faster than GB	-1.5

Greater Lincolnshire sector growth index – sector priorities

- Many sectors classified as static using the Sector Growth Index, with many scoring ± 2 . More analysis is provided on the next slide, but this slide focuses on previously identified sector priorities/strengths:
- **Agri-food:** there has been some growth in agri-food. Agri food contributes almost three times as much to the economy than nationally (19.7% vs 6.6%) and employs over double the proportion of people nationally (15.3% vs 7.0%). The sector is also 19% more productive than nationally.
- **Defence:** strongest growth of the priority sectors using the Sector Growth Index. The sector contributes slightly more to the economy than nationally (1.4 vs 1.1%) and is 30% more productive than nationally.
- **Manufacturing:** some growth, with the sector contributing over double the proportion to the economy compared to nationally and employs double the proportion of people.
- **Ports & logistics:** appears to be some decline using the Sector Growth Index. Ports & logistics employs a relatively high proportion of people (8.1% vs 6.4%), accounts for over 10% of businesses (6.6% nationally) and makes a larger contribution to the economy (5.7% vs 4.9%) and is almost 1.5x as specialised as nationally. However, the sector is a fifth less productive than nationally.
- **Energy:** there has been strong growth – energy sector is 1.2x as specialised as its is nationally and contributing more in GVA (2.2% vs 1.2%)
- **Hospitality:** some growth, although productivity has declined it has declined more slowly than nationally, but remains almost a quarter less productive. Employs similar proportion at 9% and 3.0% of GVA as nationally.
- **Health:** significant employer, employing proportionally more people (14.8% vs 13.6%) but sector has declined somewhat and is 12% less productive than nationally.

	Growth index score of 3 or more, sector has seen growth across multiple measures.
	Growth index score between -3 and 3, growth has been relatively static or mixed
	Growth index score of -3 or less, sector has seen decline across multiple measures.



Sector Growth Index – further analysis

- Strong growth in creative and cultural sectors could represent growth opportunities to pursue for Greater Lincolnshire but currently is not a significant driver of the economy.
 - Creative and cultural contributes 1.0% of the overall economy compared to 2.7% nationally, and 1.6% of employment compared to 2.8% nationally. The sector is 40% less productive than nationally.
- Advanced manufacturing: Greater Lincolnshire displays a higher degree of specialism within manufacturing than advanced manufacturing which has declined using the Sector Growth Index. In Greater Lincolnshire, advanced manufacturing employs 2.2% (3.0% nationally) and contributes 2.3% of total GVA (3.2% nationally). Productivity was comparable in 2022 but in 2023 there appears to have been a slowdown in Greater Lincolnshire with productivity 16% below UK levels.
- Construction showing strong signs of growth and contributes similar proportions to the total economy and employment compared to nationally, with proportionately more businesses. There has been growth in productivity but the sector remains 9% less productive than nationally.
- Professional business services, financial services, life sciences and digital tech are far less significant in Greater Lincolnshire compared to nationally.
 - Digital tech: along with life sciences, showing strong signs of decline using the Sector Growth Index. The sector employs 1.5% of people compared to over 4% nationally, and contributes 1.4% to the economy compared to over 5% nationally. The sector is over a third less productive than nationally.
 - Life sciences: the sector employs 0.7% of people compared to 1.5% nationally, and contributes 0.6% compared to 1.4% nationally. The sector is around a quarter less productive than nationally.
 - Professional business services: no signs of growth using the Sector Growth Index. The sector employs 3.4% of people compared to over 7% nationally, and contributes just over 2% of the total economy compared to 9% nationally. The sector is only half as productive as it is nationally.
 - Financial services & insurance: employs less than 0.5% of people in Greater Lincolnshire compared to 2% nationally, and contributes 1% to the economy, compared to 6% nationally. The sector is also over a quarter less productive than nationally.

Energy Generation, Storage and Management

Greater Lincolnshire has strengths in Clean Energy Generation particularly in offshore and onshore wind generation, along with Hydrogen storage.

- Considering SIC codes, the energy sector is 1.2x as specialised as nationally, making up slightly more of total employment (1.4% vs 1.0% nationally) and of GVA (1.7% vs 1.1% nationally).
- Data City uses an alternative, Real Time Industry Classifications (RTIC), allowing us to get an insight into the emerging economy business base within the clean energy sector.
- Overall the clean energy sector has over 300 businesses, and is a bit more specialised than compared to nationally.
- Energy generation is a relative strength across most components, with 83 businesses across Greater Lincolnshire, almost twice as specialised as nationally
 - Particular strengths in wind generation, unsurprising given offshore wind farm projects completed or in construction off the coast.
 - Hydrogen has also emerged as a strength in relation to generation and storage.
- Overall, Energy Management does not appear to be specialised in Greater Lincolnshire, but an there is an emerging strength is in Smart Grids (*electricity network that use digital technologies, sensors and software to better match the supply and demand of electricity*).

RTIC/sub-RTICs	Number of businesses	LQ
Energy Generation	83	1.94
Solar	13	0.81
Onshore Wind	63	4.72
Offshore Wind	47	8.72
Nuclear	2	0.78
Bioenergy	10	2.39
Thermal	1	0.82
Hydrogen	37	6.04
Energy Management	26	0.78
Smart Grid	23	3.80
Smart Meter	0	0.00
Energy Management Systems	3	0.11
Energy Storage	50	2.00
Thermal	0	0.00
Mechanical	0	0.00
Hydrogen	45	12.65
Batteries	5	0.25

Source: Data City (2025)
Note: Those in green are RTICs; those in white are sub RTICs. Businesses may relate to more than 1 RTIC so will not sum to the overall clean energy definition. Definitions can be found in the annex

CleanTech & Net Zero

Some strengths within CleanTech and wider Net Zero sub sectors but major strengths are in wind generation and hydrogen storage.

- There are 58 businesses in Greater Lincolnshire relating to CleanTech.
 - Most of these related to energy production, management and storage, which overlap with analysis on the previous slide, where wind generation and hydrogen are major clean energy strengths in Greater Lincolnshire.
 - There is also a relative specialism within CleanTech relating to agriculture, which was analysed in the agri food section.
- Within the Net Zero RTIC, low carbon energy generation and renewables are strengths for Greater Lincolnshire, again as explained in the previous slide where there is overlap.
 - Diversion of Biodegradable Waste from Landfill (*Companies focusing on landfill management*) is another relative specialism in Greater Lincolnshire.
 - Other Net Zero related elements do not come out particularly strongly in Greater Lincolnshire including low carbon consultancy and advisory; pollution control and mitigation; low emissions vehicles (*Companies focusing on the development of technology and infrastructure for electric vehicles*) and building technologies (*Companies providing technology and services for increased energy efficiency in buildings*), which are all relatively unspecialised as compared to nationally.

RTIC/sub-RTICs	Number of businesses	LQ
CleanTech	58	1.29
Adapted goods	2	0.46
Agriculture, forestry and biodiversity	3	1.83
Energy production, management and storage	51	2.11
Environmental protection and monitoring	2	0.18
Mining, fuels and biofuels	0	0.00
Water processing	1	0.23
Net Zero	261	1.08
Renewables	107	1.44
Low Carbon Energy Generation	88	1.83
Diversion of Biodegradable Waste from Landfill	42	2.18
Low Carbon Consultancy, Advisory & Offsetting Services	7	0.32
Low Emissions Vehicles	7	0.35
Pollution Control and Mitigation	2	0.24
Building Technologies	4	0.44
Clean Energy Sector	305	1.06

Source: Data City (2025)
Note: Those in green are RTICs; those in white are sub RTICs. Businesses may relate to more than 1 RTIC so will not sum to the overall clean energy definition.

People

People headlines – population & employment

- Over the last 30 years, Greater Lincolnshire's population has grown by an average of 0.7% to 1.11m in 2023. Growth has been faster than across the UK, with much of this concentrated in Lincolnshire. Although, population has actually fallen in North East Lincolnshire.
- Much of the population growth in Greater Lincolnshire been amongst older age groups, with almost a quarter of the population now aged 65 and over.
 - This is 4.5pp above what is seen across the UK, with more people in Greater Lincolnshire also approaching retirement age.
 - Apart from Lincoln, the population in Greater Lincolnshire tends to be older, particularly in East and West Lindsey.
 - Given the pronounced fall in working age population across Greater Lincolnshire, coupled with a rise amongst older age groups, attracting people to live and work in the area will be critical to support the economy, whilst also supporting Greater Lincolnshire's ageing population.
- Over 20% of neighbourhoods in Greater Lincolnshire are amongst the most 10% deprived nationally, with significant pockets of deprivation in areas of Lincolnshire (to the East of the County, particularly in coastal areas of Skegness and Mablethorpe); coastal areas in North East Lincolnshire (Grimsby, Cleethorpes, and area around Immingham Dock); Scunthorpe; and Lincoln.
 - Latest Census data reiterates that households in Greater Lincolnshire are more likely to experience deprivation than nationally and regionally.
- Employment rate has fallen since 2018/19 from 74.3% to 71.2% in 2023/24. Greater Lincolnshire has seen a sharper decline in employment, particularly in Lincolnshire. The employment rate is around 71% across GL's three authority areas, below regional and national comparators.
 - Greater Lincolnshire has seen a sharper rise in economic inactivity since 2018/19 than comparators, and levels in 2023/24 are relatively high at a quarter of the working age population.
 - Economic inactivity is highest in North Lincolnshire. North East Lincolnshire has seen rising levels of employment, coupled with falls in inactivity, where levels are towards the Yorkshire average, but economic inactivity is at least 24% across GL's three authorities (21.6% nationally).
 - Long-term sickness has risen sharply as a reason for inactivity in Greater Lincolnshire to an even greater extent than nationally, accounting for over a third of total inactivity in Greater Lincolnshire.
 - There has also been an increase in the proportion of those who are economically inactive who don't want a job in Greater Lincolnshire, following national trends but to an even greater extent.
- People are more likely to be employed in intermediate or low skilled occupations than nationally and regionally.
- A decline in the proportion of people earning below the Living Wage but there remains more people Greater Lincolnshire earning below the Living Wage than nationally and regionally. North Lincolnshire, Lincoln and North Kesteven in line with regionally but North East Lincolnshire, Boston, and East and West Lindsey levels are relatively high at around a quarter of jobs earning below the Living Wage.

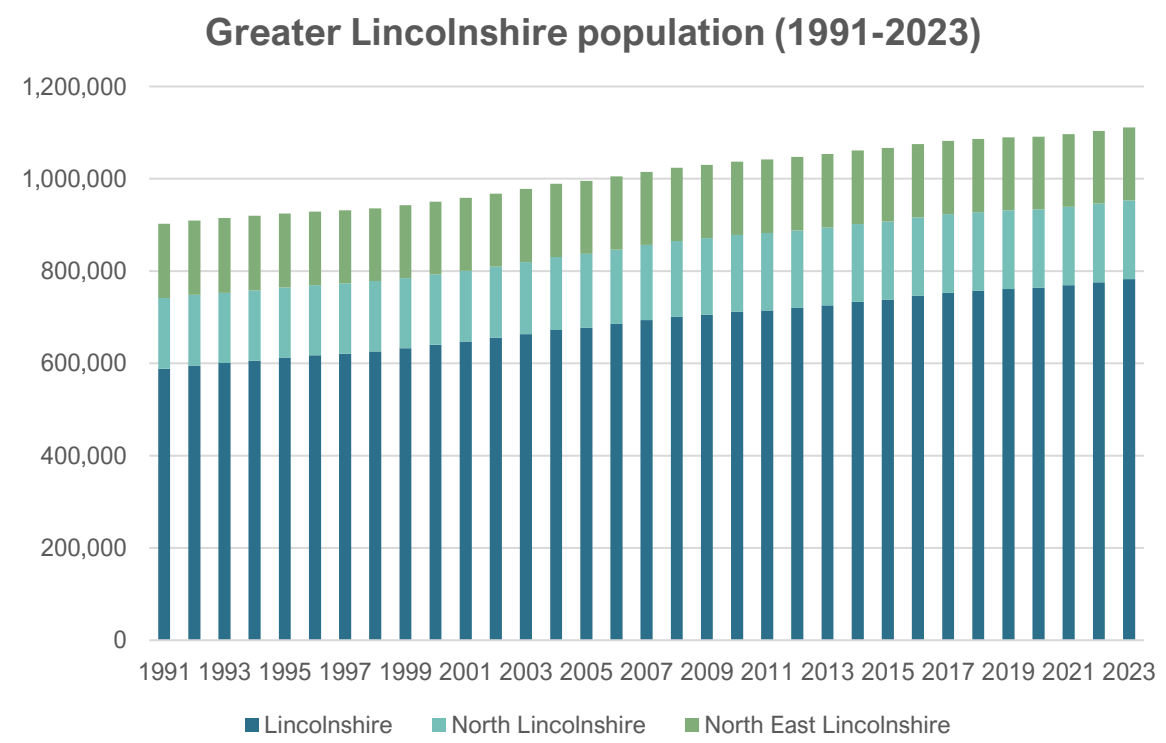
People headlines – skills and health

- Qualification attainment remains relatively low in Greater Lincolnshire, where fewer people are qualified to degree level and more people have no formal qualifications than compared to regionally and nationally.
 - The difference in the proportion qualified to degree level is particularly stark. Despite progress since 2019, in 2023 32% were qualified to RQF4+, 15 percentage points lower than the UK average, and between 8-9 percentage points below regional averages.
- Positively, the proportion of 16 and 17 year olds who are not in education, employment or training (NEET) is in line with nationally and below the Yorkshire average, although there has been an increase in North East Lincolnshire from an already high base.
- FE education and skills participation and achievements have grown since 2019/20 despite being impacted by the Pandemic, and in 2023/24 rank among the highest of comparator areas.
 - Achievements are relatively high across Greater Lincolnshire, but have fallen since 2019/20 in North East Lincolnshire.
 - Total apprenticeship achievements have risen by 11% since 2019/20, mainly driven by a rise in higher and advanced apprenticeships, but growth is below regionally and nationally.
 - Apprenticeship achievements are similar across Greater Lincolnshire and are above national rates but relatively low compared to Yorkshire and regional CA comparators.
 - Apprenticeships only make up part of overall FE achievements, but remain an important route into further training and employment.
- Life expectancy in Greater Lincolnshire is in line with the Yorkshire average but has seen a slight decline post Pandemic unlike comparator areas particularly for men across all three GL authorities.
 - Life expectancy has remained at a similar level in Lincolnshire and North Lincolnshire for women, but has fallen in North East Lincolnshire.
 - Across Greater Lincolnshire, it is estimated that men from most deprived areas will live 10.5 years fewer and for women 8.8 years fewer than those from least deprived areas.
 - This is in line with inequality found across Yorkshire but above other comparator areas, and more pronounced in North and North East Lincolnshire.
- Greater Lincolnshire has consistently had amongst the lowest proportion of adults who are physically active than comparator areas despite an increase since 2017/18.
- The prevalence of obesity in Greater Lincolnshire is broadly in line with comparator areas, although is slightly above national rates for reception and year 6 students.

Population growth in Greater Lincolnshire

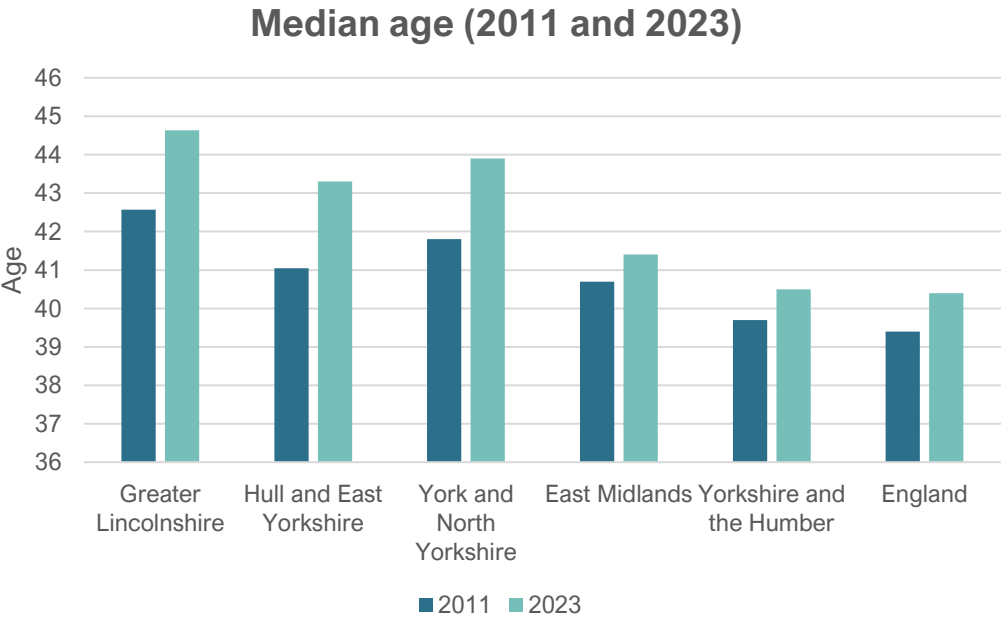
Lincolnshire makes up 70% of total population in Greater Lincolnshire and has seen 0.9% growth in population since 1991. North Lincolnshire has seen growth of 0.3% annually whereas population has shrunk in North East Lincolnshire.

- Greater Lincolnshire’s population has grown from just over 900,000 30 years ago to 1.1m in 2023 – growing on average by 0.7% annually.
- Lincolnshire makes up the majority of Greater Lincolnshire’s population and accounts for much of this growth, now making up over 70% of Greater Lincolnshire’s population from 588,600 in 1991 to almost 783,000 in 2023.
 - Lincolnshire’s population has grown by 0.9% annually, above growth seen across comparator areas, including 0.5% nationally.
 - Population is fairly spread through the 7 LAs in Lincolnshire, but by far most dense in the city of Lincoln.
- North Lincolnshire’s population has seen more modest growth of 0.3% annually from 152,900 in 1991 to 170,100 in 2023.
- North East Lincolnshire’s population has shrunk from 161,000 in 1991 to 158,300 in 2023. No other comparator area has seen a decline in population over the same period.



Median age

There is large variation across CA areas, where city areas of Lincoln, York and Hull have younger populations, with remaining authority areas tending to have older populations. Generally across areas, the population has been growing older apart from Lincoln, which has by far the youngest population in Greater Lincolnshire, largely influenced by the University of Lincoln, with a similar story in York and Hull. Apart from Lincoln, Greater Lincolnshire’s population tends to be older than compared to regionally and nationally, particularly in East and West Lindsey.

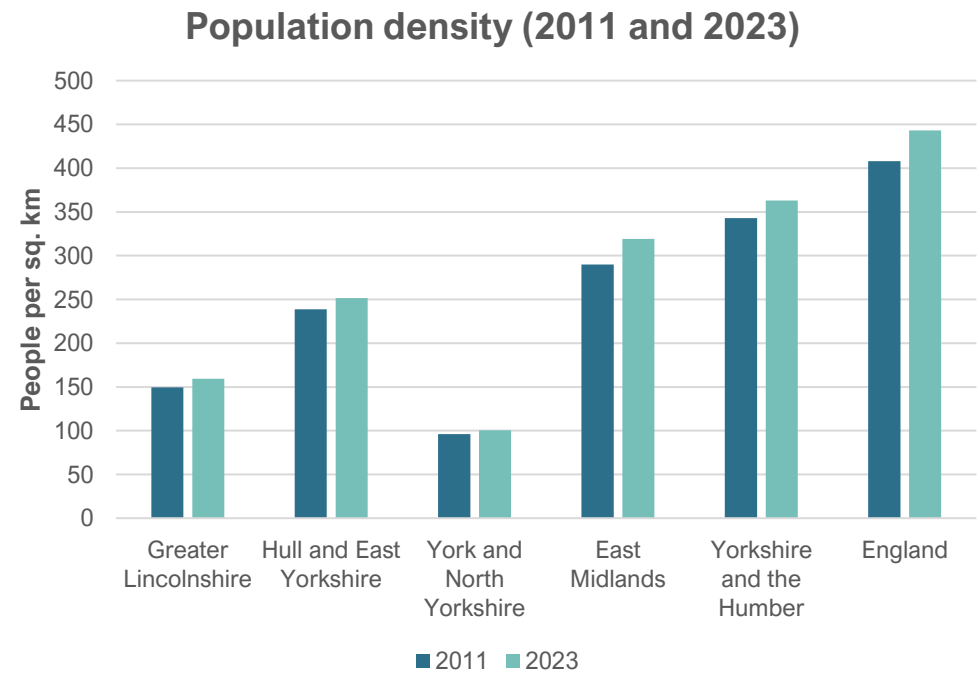


Median age (2011 and 2023)

Area	2011	2023
North East Lincolnshire	41.1	43.1
North Lincolnshire	42.4	45.0
Lincolnshire	44.2	45.8
Boston	42.4	42.6
East Lindsey	49.3	53.7
Lincoln	34.5	34.6
North Kesteven	44.4	46.2
South Holland	45.1	46.3
South Kesteven	43.7	46.1
West Lindsey	45.8	48.5
Hull	36.2	36.9
East Riding of Yorkshire	45.9	49.7
North Yorkshire	44.8	48.8
York	38.8	39.0

Population density

Population is concentrated in Lincolnshire, with by far the highest concentration in the city of Lincoln. North East Lincolnshire is another area where population tends to be more concentrated within Greater Lincolnshire, with other areas tending to be more sparsely populated, with fewer people per sq. km than regionally and nationally.

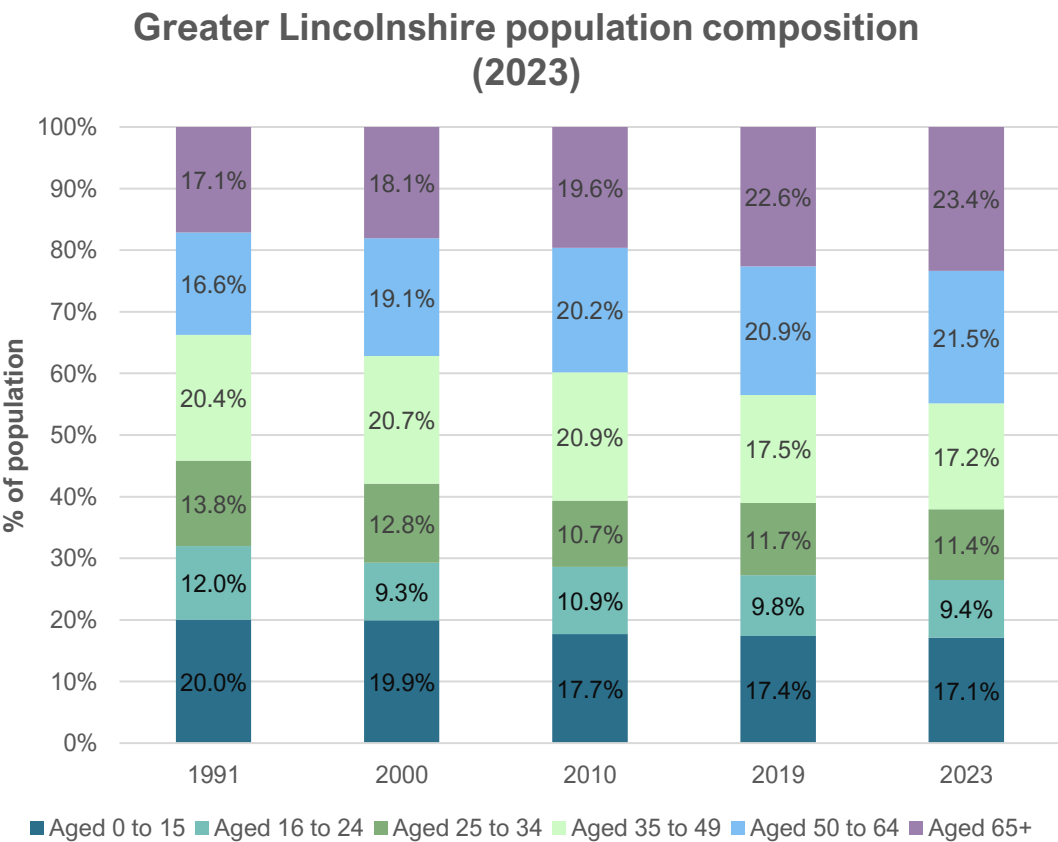


People per sq. km (2011 and 2023)		
Area	2011	2023
North East Lincolnshire	829	822
North Lincolnshire	198	201
Lincolnshire	120	132
Boston	178	196
East Lindsey	77	82
Lincoln	2,608	2,895
North Kesteven	118	131
South Holland	118	131
South Kesteven	142	155
West Lindsey	77	85
Hull	3,578	3,799
East Riding of Yorkshire	139	146
North Yorkshire	75	78
York	727	760

Population composition Greater Lincolnshire

Much like the UK, Greater Lincolnshire’s population has become older over the last 30 years, but Greater Lincolnshire’s population has seen more growth in older age groups and a more pronounced decline in the working age population

- Greater Lincolnshire’s population has increased by 0.7% on average since 1991. Much of this growth has been amongst older age groups.
 - The number of people aged 50-64 has increased by 1.5% annually.
 - An average 1.6% rise in those aged 65 and over.
- This is similar to population changes seen nationally, but has been even more pronounced in Greater Lincolnshire.
 - Those aged 50-64 make up 4.9 percentage points more of the population since 1991 (4.1pp rise nationally). North and North East Lincolnshire have seen over a 5pp rise.
 - Those aged 65 and over make up 6.3 percentage points more of the population (3.2pp rise nationally). At least a 6pp rise across Greater Lincolnshire, including a 7.3pp rise in North Lincolnshire.
 - The working age population makes up -3.3pp less of Greater Lincolnshire’s population (-1.1pp decline nationally). The greatest fall has been a -4.2pp decline in North Lincolnshire.

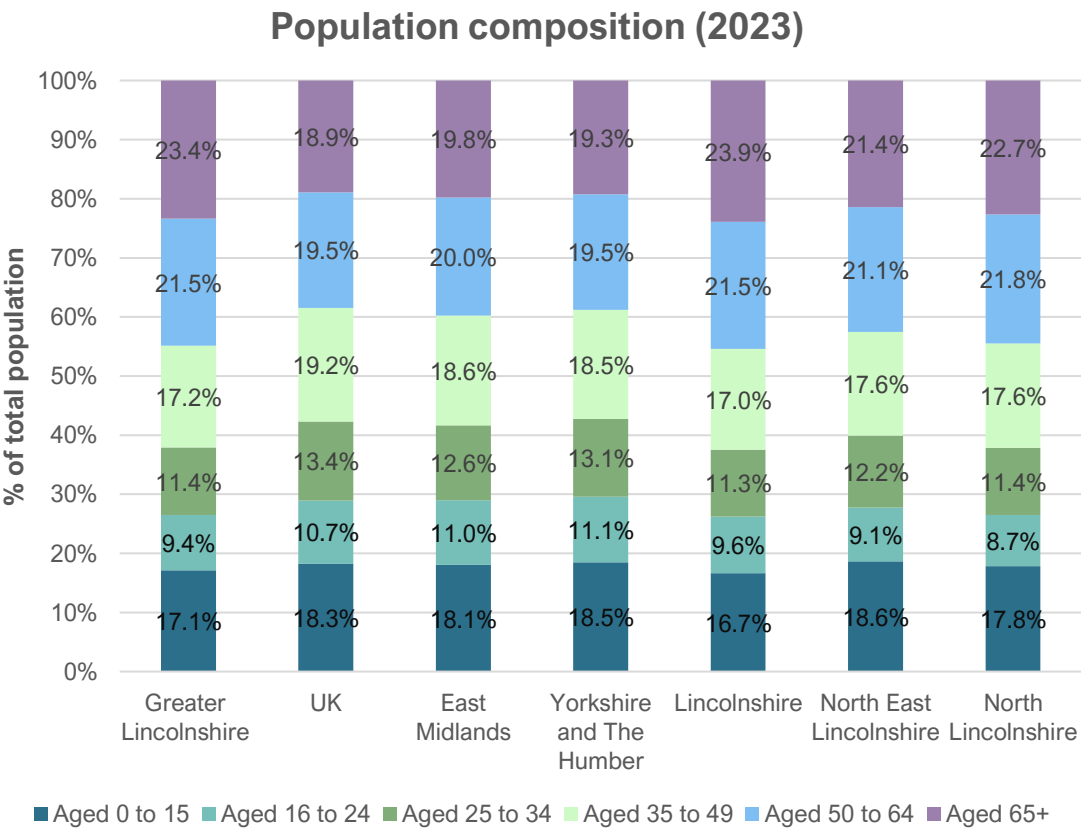


Source: ONS Population Estimates (2023)

Population composition (2023)

Greater Lincolnshire’s population is older than comparator areas, with almost a quarter of residents aged 65 and over

- As can be seen by the chart to the right, Greater Lincolnshire has a lower proportion amongst younger age groups up to and including those aged between 35 and 49, and proportionately more of the population made up by those aged 50 and over, particularly to the UK average.
- This is particularly the case in Lincolnshire where 24% of the population is aged 65 and over.
- 59.5% of the population is of working age (16-64) in Greater Lincolnshire. Within Greater Lincolnshire, this is between 59 and 60%.
- This is lower than all comparator areas – 63% of the UK population is of working age, and is 62% across the East Midlands and Yorkshire and the Humber.



Source: ONS Population Estimates (2023)

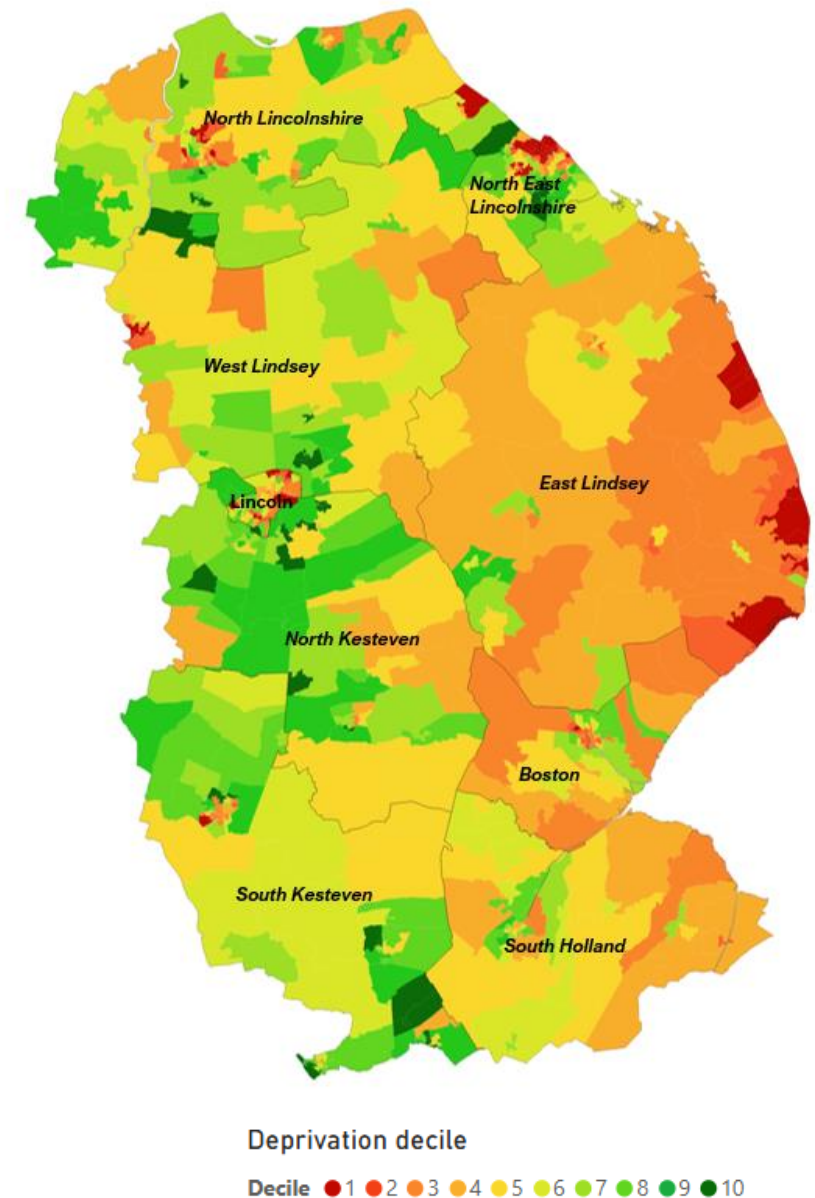
Deprivation in Greater Lincolnshire

Over 20% of neighbourhoods in Greater Lincolnshire are amongst the most 10% deprived nationally with acute challenges in some of the region's coastal communities

- Across Greater Lincolnshire there are challenges ensuring residents have access to the opportunities they need. These challenges appear most acute in eastern/coastal parts of Lincolnshire (East Lindsey, Lincoln and Boston) and North East Lincolnshire.
- Deprivation is particularly high in East Lindsey, which ranks amongst the top 10% most deprived local authorities nationally (30 out of 317 local authorities) - high levels of deprivation around Skegness and Mablethorpe.
 - Lincoln (68th) and Boston (85th) also rank in and around the top 25% most deprived local authorities nationally.
 - South Holland (144th) and West Lindsey (146th) rank towards the median.
 - South Kesteven and North Kesteven amongst the 30% least deprived local authorities nationally. North Kesteven 49th least deprived and South Kesteven 84th least deprived out of 317 local authorities in England.
- North East Lincolnshire ranks around the top 20% most deprived local authorities (66th out of 317 local authorities), with high deprivation in Grimsby, Cleethorpes, and area around Immingham Dock.
- North Lincolnshire ranks 120th most deprived out of 317 local authorities, with high deprivation in Scunthorpe.

Source: Ministry of Housing, Communities and Local Government English indices of deprivation (2019)

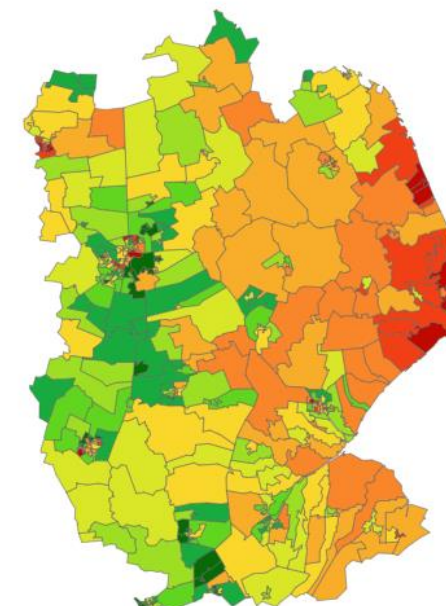
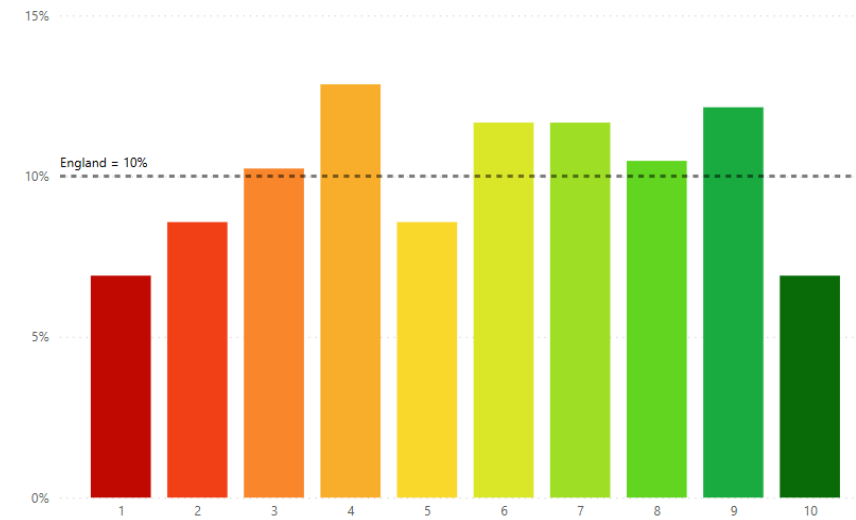
Overall Index of Multiple Deprivation (2019)



IMD Lincolnshire

- Variable story where North and South Kesteven are amongst some of the least deprived areas nationally, contrasting with coastal communities in East Lindsey including Skegness and Mablethorpe which are amongst the most 10% deprived nationally; most of eastern Lincolnshire amongst 20-40% most deprived nationally including Boston. Some areas in Lincoln also face high deprivation.
- Of the IMD domains, income, employment, education and health all display challenge.
 - For income both East Lindsey and Lincoln are in and around most 20% deprived LAs nationally.
 - East Lindsey is within top 10% most deprived in terms of employment (25th most deprived out of 317).
 - Boston is the most deprived local authority nationally in terms of education, skills and training; South Holland is ninth most deprived nationally and East Lindsey within top 10% most deprived nationally.
 - East Lindsey and Boston are amongst the 20% most deprived nationally in terms of health.
 - The remaining domains (crime, barriers to housing and services and living environment) generally show a lower level of deprivation, although East Lindsey ranks around most 25% most deprived nationally in terms of living environment.

LSOAs in each national decile



Deprivation decile

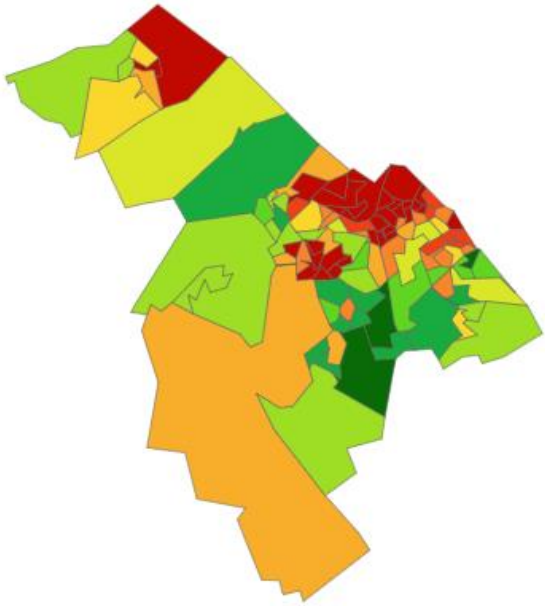
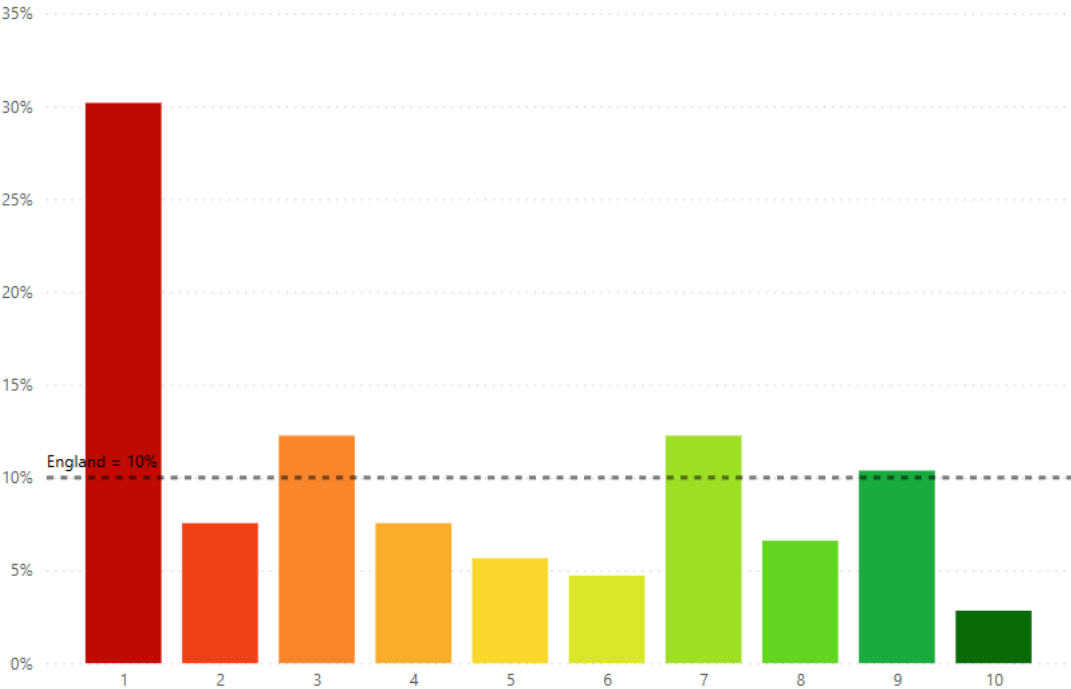
Decile 1 2 3 4 5 6 7 8 9 10

Source: Ministry of Housing, Communities and Local Government English indices of deprivation (2019)

IMD North East Lincolnshire

Over 30% of neighbourhoods in North East Lincolnshire rank amongst the top 10% most deprived nationally including Grimsby, Cleethorpes, and area around Immingham Dock, however areas in and around New Waltham are amongst the least deprived neighbourhoods nationally. There is a high level of deprivation across pretty much all the IMD domains - for income, employment, education, and crime, North East Lincolnshire ranks amongst the 20% most deprived local authorities nationally; health amongst 25% most deprived of local authorities; and living environment 30% most deprived nationally.

LSOAs in each national deprivation decile

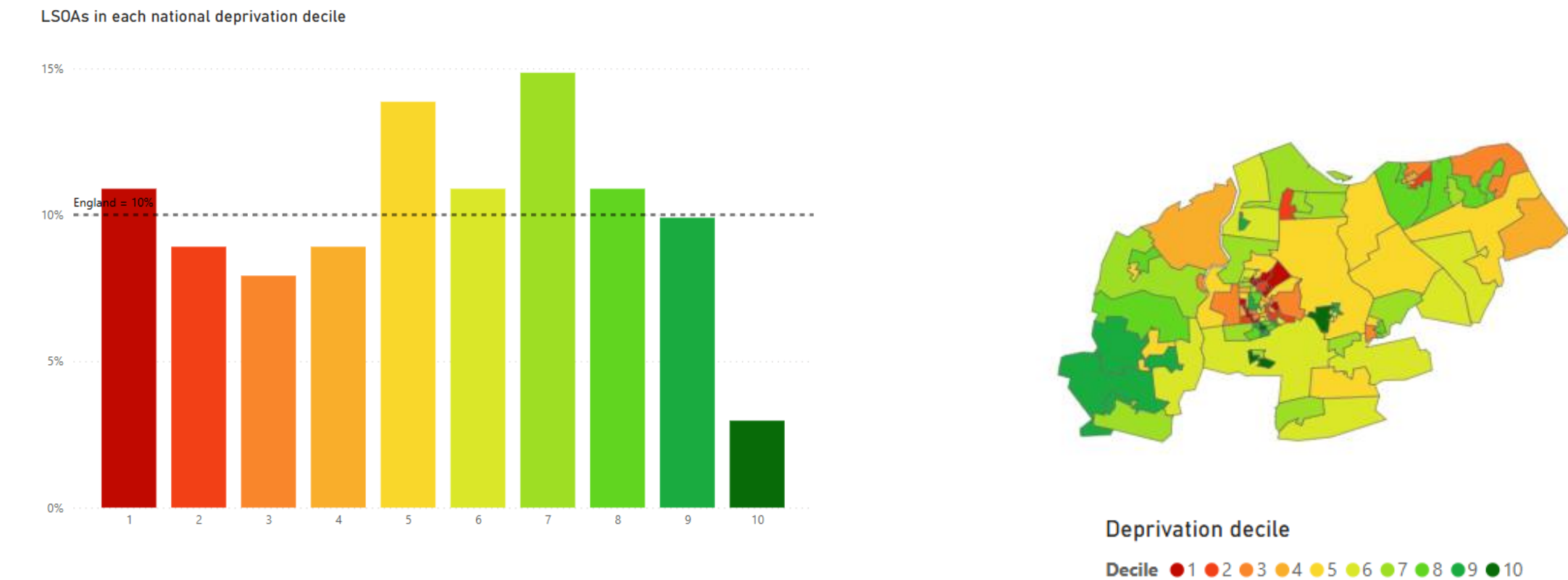


Deprivation decile
Decile 1 2 3 4 5 6 7 8 9 10

Source: Ministry of Housing, Communities and Local Government English indices of deprivation (2019)

IMD North Lincolnshire

Variable story where Epworth and Haxey rank towards the least deprived neighbourhoods nationally, contrasting with areas in Scunthorpe which are amongst the most deprived nationally. Of the IMD domains, employment and education, skills and training come out as most deprived where North Lincolnshire is amongst the top 25% most deprived local authorities; for the health and income, North East Lincolnshire ranks around 30% most deprived of local authorities in England.



Source: Ministry of Housing, Communities and Local Government English indices of deprivation (2019)

Household deprivation – Census 2021

Using latest Census data, we can see more up-to-date estimates relating to deprivation. The dimensions of deprivation are based on education, employment, health and housing. Although there are more households in Greater Lincolnshire which are not deprived in any dimension between the 2011 and 2021 Census, this broadly follows patterns across the country, and there remains a higher proportion of households deprived in at least one dimension in Greater Lincolnshire compared to other areas. North East Lincolnshire has the highest proportion of households who are deprived, similarly to the IMD, with fewer households not deprived in any dimension and more deprived in two dimensions.

Area	% households not deprived in any dimension	% households deprived in one dimension	% households deprived in two dimensions
Greater Lincolnshire	46.0	35.2	15.1
Hull and East Yorkshire	46.8	34.1	15.2
York and North Yorkshire	53.4	32.9	11.3
East Midlands	48.1	33.9	14.3
Yorkshire and the Humber	46.8	33.7	15.1
England and Wales	48.3	33.5	14.3
Lincolnshire	46.4	35.3	14.8
North East Lincolnshire	44.0	34.6	16.6
North Lincolnshire	46.1	35.0	15.2

Source: ONS Census (2021)

Notes: Education: A household is classified as deprived in the education dimension if no one has at least level 2 education and no one aged 16 to 18 years is a full-time student.
Employment: A household is classified as deprived in the employment dimension if any member, not a full-time student, is either unemployed or economically inactive due to long-term sickness or disability.
Health: A household is classified as deprived in the health dimension if any person in the household has general health that is bad or very bad or is identified as disabled. People who have assessed their day-to-day activities as limited by long-term physical or mental health conditions or illnesses are considered disabled. This definition of a disabled person meets the harmonised standard for measuring disability and is in line with the Equality Act (2010).
Housing: A household is classified as deprived in the housing dimension if the household's accommodation is either overcrowded, in a shared dwelling, or has no central heating.

Social Mobility Index

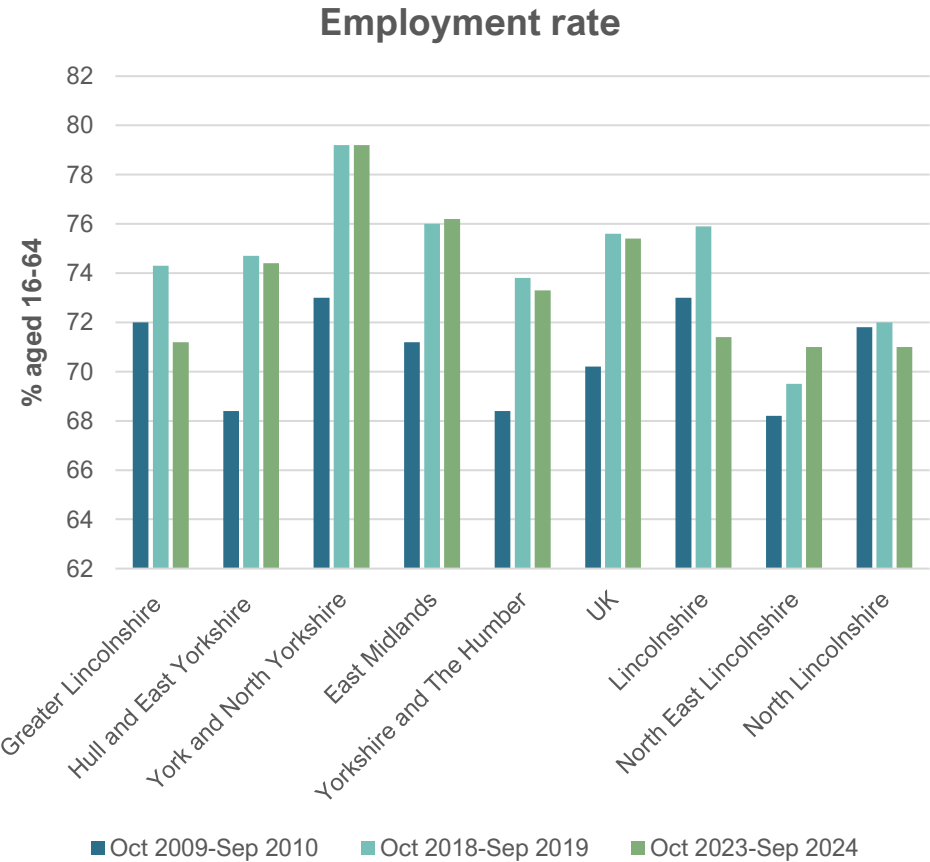
Varying experiences for the authorities in Greater Lincolnshire, but all display a degree of challenge on at least one of the four composite measures making up the Social Mobility Index. North and North East Lincolnshire display challenge in two of the four measures.

- *There are 4 composite measures of social mobility by region: Promising prospects; Conditions of childhood; Labour market opportunities for young people; and Innovation and growth.*
- *Each of these measures combines data from multiple indicators into a single 'composite' score to give a more reliable picture of geographical patterns. For each composite measure, 203 regions in the UK are put into 5 groups – from 'most favourable' to 'least favourable' conditions – based on their composite scores. These are purely descriptive statistics and cannot demonstrate any causal effects of regions on outcomes.*
- Lincolnshire: for promising prospects, conditions of childhood and labour market opportunities, Lincolnshire ranks among the middle group. For innovation and growth, it ranks in the unfavourable group.
- North East Lincolnshire: least favourable group for conditions for childhood; unfavourable for promising prospects; and in the middle group for labour market opportunities and innovation and growth.
- North Lincolnshire: least favourable group for labour market opportunities; unfavourable group for conditions of childhood; and middle group for promising prospects and innovation and growth.
- Areas with unfavourable opportunities include older industrial and port areas in the North and the Midlands, including North and North East Lincolnshire. This means young people living here are less likely to be in professional occupations and more likely to be unemployed. There is a fairly clear north-south divide in terms of opportunities, where many areas in London and the South East are amongst most favourable areas.
- Less favourable conditions of childhood tend to be found in the North East of England, in coastal cities, industrial and former mining areas, including North East Lincolnshire. This means parents are likely to earn relatively low wages, lower levels of education and lower occupation levels.
- Data for innovation combines broadband speed, business spending on research and development (R&D) and postgraduate education. Many rural areas, including Lincolnshire tend to be less favourable environments under the innovation measure. Many of the local authorities with favourable environments for innovation and growth are in London and the home counties.

Employment rate

The employment rate in Greater Lincolnshire has consistently ranked amongst the lowest of comparator areas since 2018/19, and has seen a more pronounced fall in employment, particularly in Lincolnshire

- In 2009/10, the employment rate in Greater Lincolnshire was above the UK rate, and was almost 4 percentage points above the regional rate for Yorkshire and the Humber.
- The employment rate rose in Greater Lincolnshire between 2009/10 and 2018/19 to 74.3%. However, the employment rate rose faster in comparator areas, including Hull and East Yorkshire and York and North Yorkshire, both seeing a rise in employment rate by 6pp between 2009/10 and 2018/19.
 - Employment remained above the Yorkshire and Humber average in 2018/19 but the gap had closed.
- Since then, the employment rate has declined more sharply in Greater Lincolnshire compared to comparator areas, with the employment rate falling to 71.2% in 2023/24, over 4pp below the national average and below all other comparator areas including regionally.
 - This is largely down to a steep decline in Lincolnshire, where the employment rate has fallen from 75.9% to 71.4% between 2018/19 and 2023/24.
 - Employment rate in North East Lincolnshire has risen but remains relatively low at 71%.
 - North Lincolnshire saw a slight decline between 2018/19 and 2023/24, with employment also at 71%.

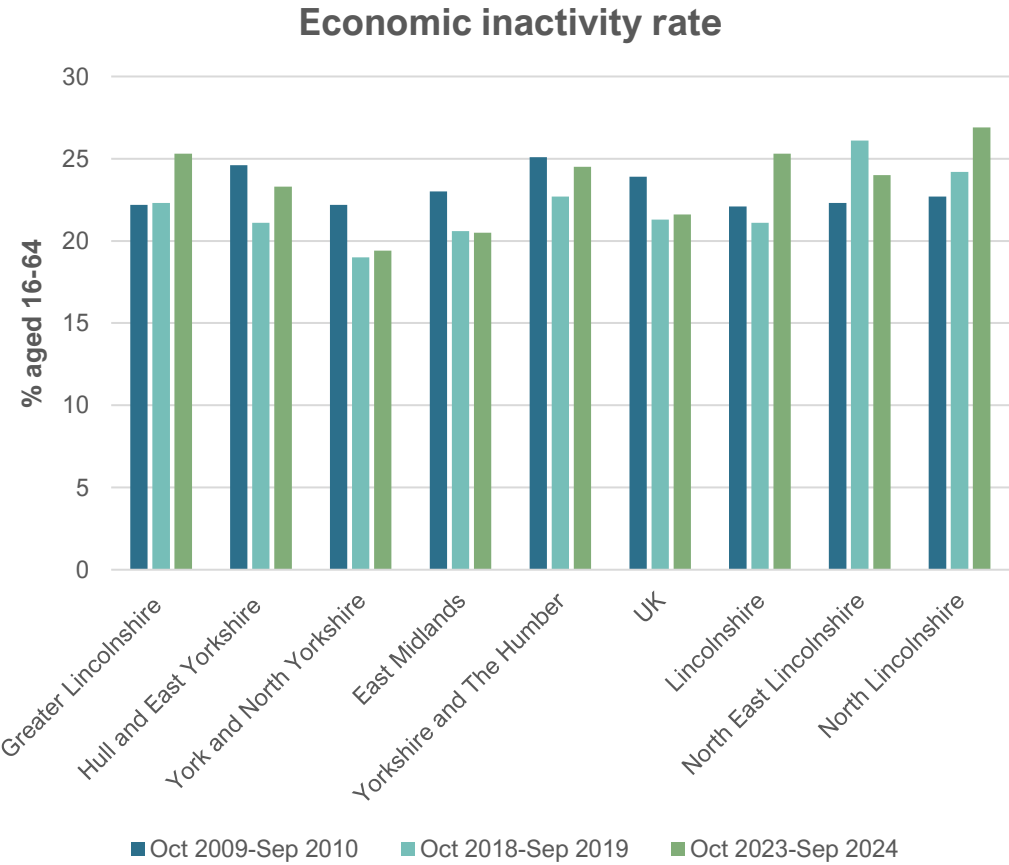


Source: ONS Annual Population Survey (2024)
Notes: The ONS has highlighted caution when analysing data from the Annual Population Survey due to low response rates. More on this can be found in the annex.

Economic inactivity

A fall in employment rate has been accompanied by a rise in economic inactivity since 2018/19 across Greater Lincolnshire, where over a quarter of the working age population are estimated to be economically inactive, above all comparator areas

- Economic inactivity, although slightly elevated to the UK level, was broadly in line with comparator areas in 2018/19.
 - Greater Lincolnshire was amongst the areas with lowest economic inactivity in 2009/10. However, most comparator areas had seen a drop in inactivity between 2009/10 and 2018/19, unlike Greater Lincolnshire where inactivity remained at around 22% from the decade before.
- Pretty much all areas have seen a rise in economic inactivity post the Covid-19 Pandemic, but the rise in economic inactivity in Greater Lincolnshire has been steeper than comparator areas, and inactivity is higher in Greater Lincolnshire than comparator areas.
- Latest estimates are that 25.3% of the working age population in Greater Lincolnshire are economically inactive.
 - A particular rise in Lincolnshire from 21.1% to 25.3%.
 - Inactivity has continued to rise in North Lincolnshire and at 26.9%, is the highest within Greater Lincolnshire.
 - A fall in economic inactivity in North East Lincolnshire, with levels in line with the regional average but inactivity remains above the UK average.



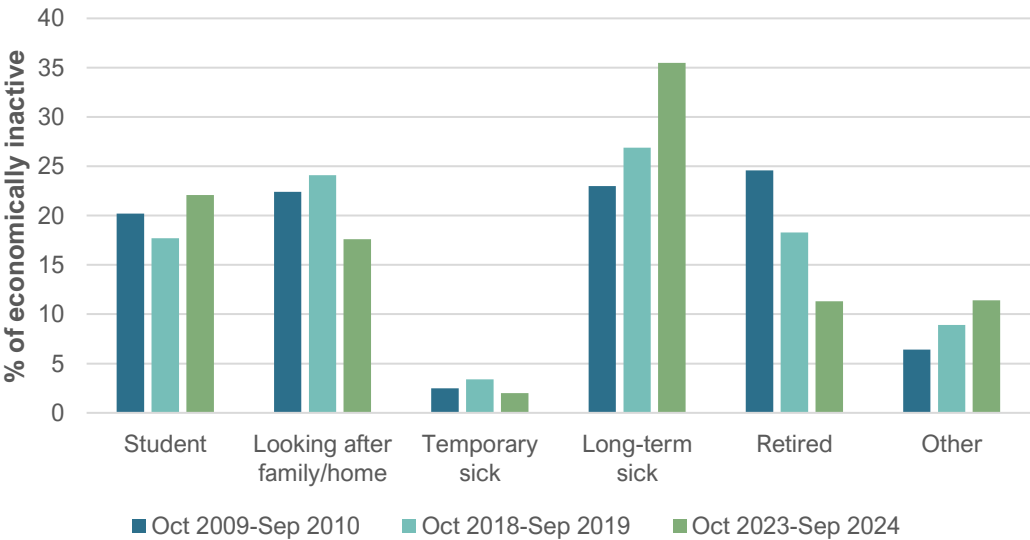
Source: ONS Annual Population Survey (2024)
Notes: The ONS has highlighted caution when analysing data from the Annual Population Survey due to low response rates. More on this can be found in the annex.

Reasons for economic inactivity

Long-term sickness is the main reason for economic inactivity in Greater Lincolnshire, rising sharply in recent years

- The chart shows how reasons for economic inactivity in Greater Lincolnshire have changed since 2009/10. Long-term sickness as a reason for inactivity has seen a sharp rise over recent years since the Pandemic, with looking after family/home and retirement accounting for proportionally less of those who are economically inactive in Greater Lincolnshire.
- The sharp rise in long-term sickness follows national trends, although the percentage of economic inactivity made up by long-term sickness is particularly high in Greater Lincolnshire at over a third of those who are economically inactive.
 - The fall in proportion of those who are retired as a reason is unique to Greater Lincolnshire. In the East Midlands this has risen as a reason for inactivity, and has stayed largely unchanged across Yorkshire and the UK.
- The rise in economic inactivity has been accompanied by an increase in the proportion of those who are economically inactive who don't want a job in Greater Lincolnshire, increasing from 78% to 88% between 2018/19 and 2023/24.
 - Again this follows national trend but to a greater extent, where across the UK 82% of those who are economically inactive don't want a job.

Reasons for economic inactivity in Greater Lincolnshire



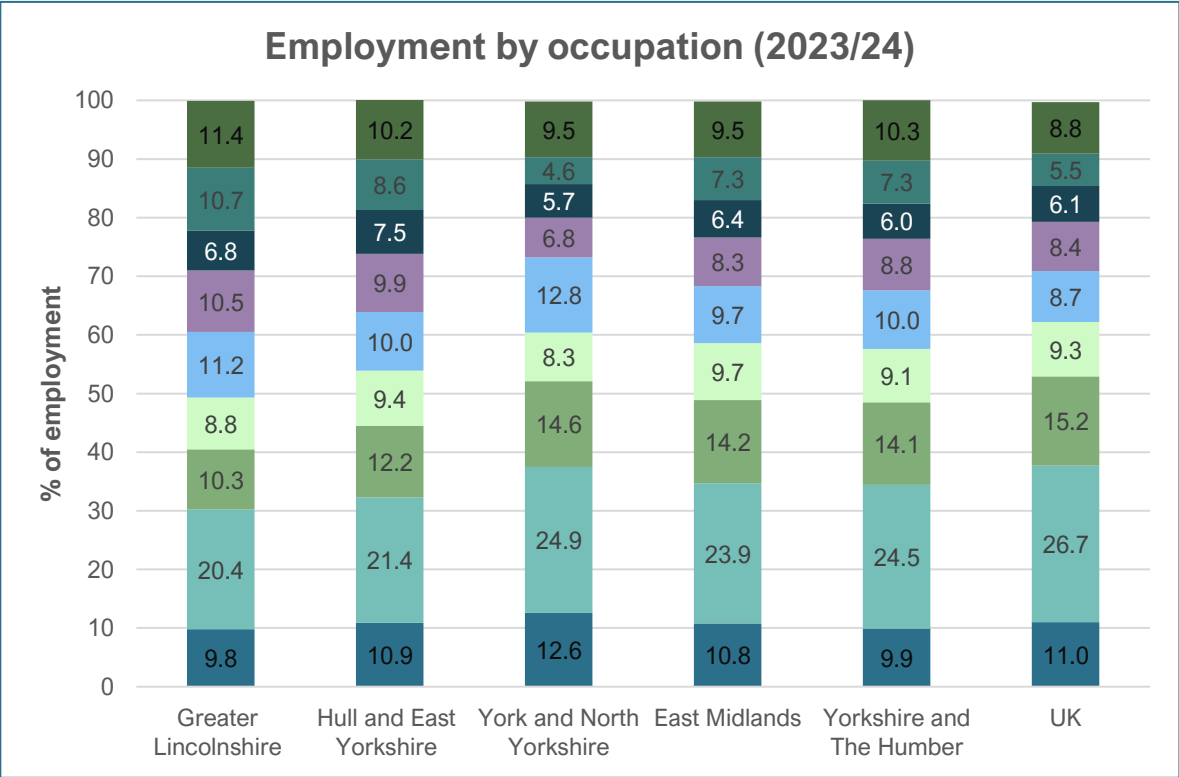
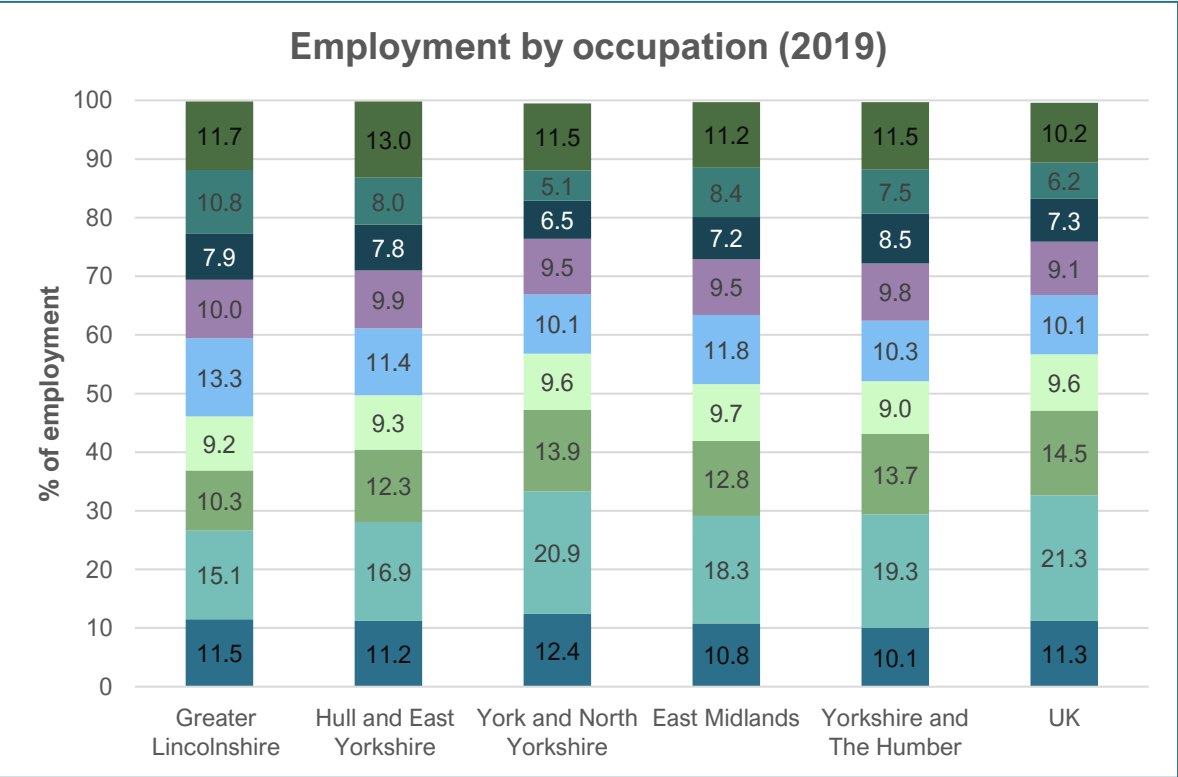
Reason for inactivity	Student	Looking after family/home	Temporary sick	Long-term sick	Retired
Greater Lincolnshire	22.1%	17.6%	2.0%	35.5%	11.3%
Hull and East Yorkshire	19.3%	14.0%	3.6%	34.7%	17.3%
York and North Yorkshire	28.8%	8.4%	1.6%	29.6%	20.5%
East Midlands	27.1%	17.7%	1.5%	28.2%	14.5%
Yorkshire and the Humber	27.8%	16.6%	2.4%	29.5%	12.7%
UK	26.8%	18.5%	2.0%	28.5%	12.9%

Source: ONS Annual Population Survey (2024)
Notes: The ONS has highlighted caution when analysing data from the Annual Population Survey due to low response rates. More on this can be found in the annex.

- Managers, directors and senior officials
- Associate prof & tech occupations
- Skilled trades occupations
- Sales and customer service occupations
- Elementary occupations
- Professional occupations
- Administrative and secretarial occupations
- Caring, leisure and other service occupations
- Process, plant and machine operatives

Employment by occupation

Greater Lincolnshire tends to have lower employment in higher skilled occupations, despite an increase in employment in professional occupations; a higher proportion in intermediate occupations particularly skilled trades and caring, leisure and other services; and a higher proportion in lower skilled occupations particularly as process, plant and machine operatives, and in elementary occupations.



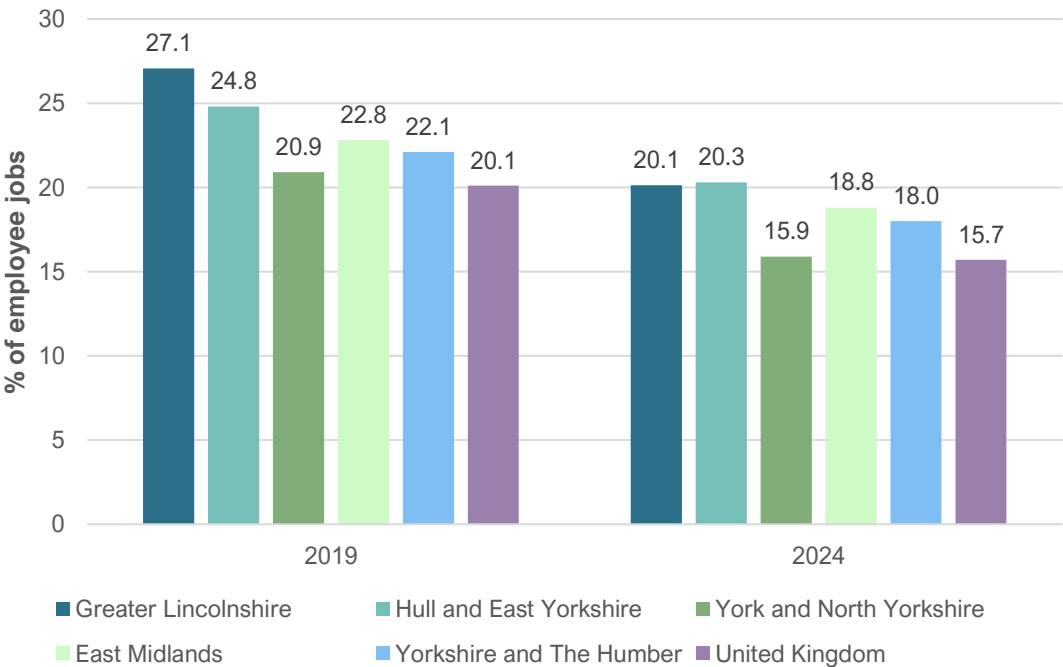
Source: ONS Annual Population Survey (2024)
Notes: Higher skilled occupations refer to managers, professional occupations and associate prof & tech occupations; intermediate occupations refer to admin and secretary. skilled trades, caring, leisure and other services occupations; and lower skilled occupations refers to sales and customer service, process, plant and machine operatives and elementary occupations.

Living Wage

There has been a decline in the proportion of jobs paying below the Living Wage in Greater Lincolnshire following national trends, but there remains relatively more people earning below the Living Wage compared to other areas

- The ONS have used estimates for the Living Wage as defined by the Living Wage Foundation’s living wage.
 - *In 2019 this was £9 and in 2022 was £9.90 for those living outside of London. These are the figures which the ONS have used as a baseline for this analysis.*
- Between 2019 and 2024, the proportion of people earning below the Living Wage in Greater Lincolnshire has fallen from 27% to 20%, following a decline nationally.
- However, more people in Greater Lincolnshire tend to earn below the Living Wage than comparator areas.
 - North Lincolnshire has the lowest proportion earning below the Living Wage at 15.5%, in line with the UK average.
 - Within Lincolnshire, North Kesteven and Lincoln have lowest proportions earning below the Living Wage at between 17-18%.
 - However in Boston, East Lindsey and West Lindsey, this rises to over a quarter of jobs.
 - In North East Lincolnshire, around 23% of jobs earn below the Living Wage.

Percentage paid below the Living Wage (2019 and 2024)

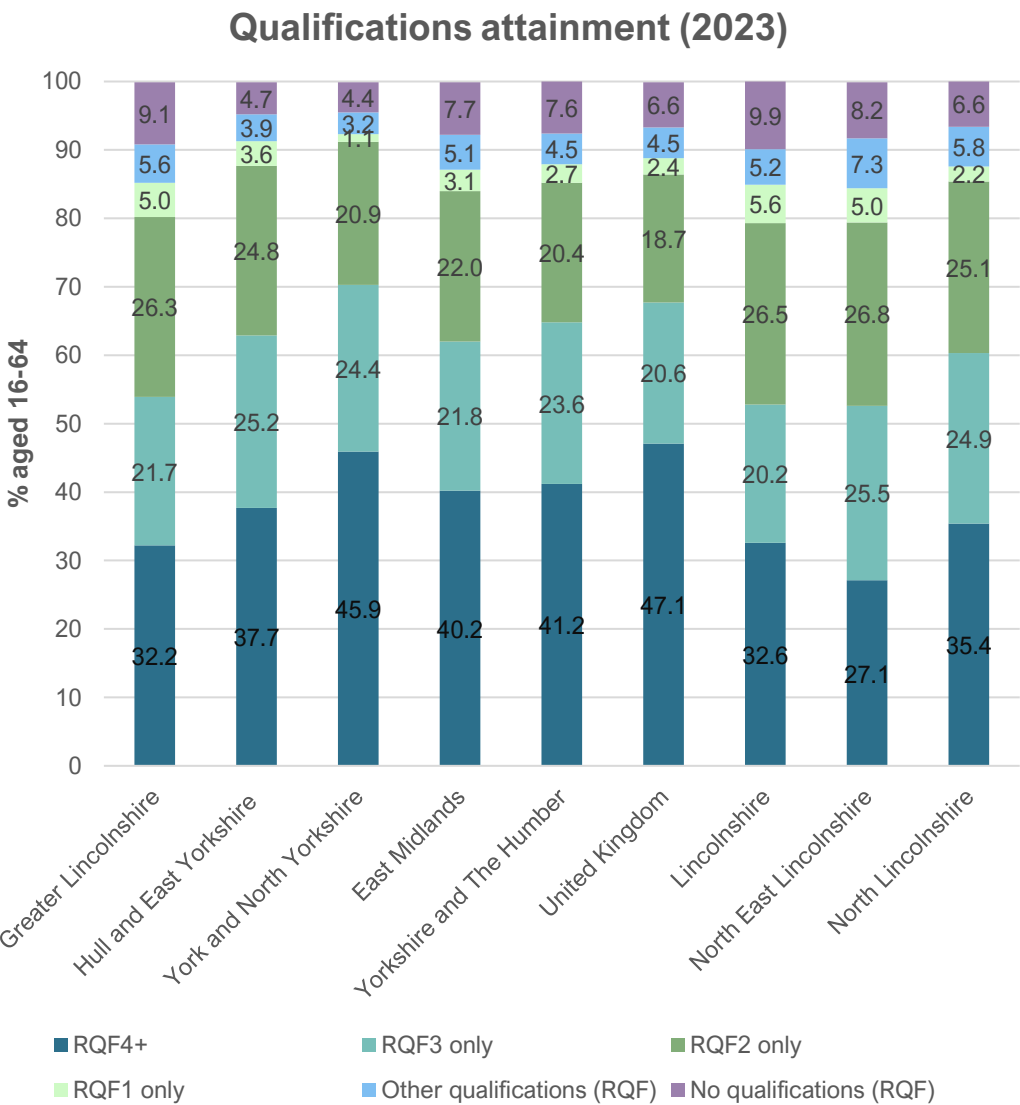


Source: ONS Number and proportion of employee jobs with hourly pay below the living wage (2024)
Notes: The National Living Wage was £11.44 for the 2024/25 financial year, rising to £12.21 from 2025/26.

Qualifications attainment

Although Greater Lincolnshire has been an increase in proportion qualified to degree level and above, qualification attainment remains relatively low in Greater Lincolnshire

- Just over 32% of the working age population are qualified to degree level or above (RQF4+), a rise from four years prior, however this remains low compared to comparator areas, where regionally, the proportion is at least 40% and nationally, it is 47%.
- In Greater Lincolnshire, more people are qualified to level 2 (GSCE grades 9-4/A*-C) or level 1 (GCSE 3-1/D-G), or hold no formal qualifications.
 - 1 in 10 people in Lincolnshire have no qualifications, 3pp above the UK average. The proportion with no qualifications is also high in North East Lincolnshire.
- Qualifications attainment in North Lincolnshire is highest amongst areas in Greater Lincolnshire, with the proportion with no qualifications in line with nationally, but fewer people are qualified to degree level.
 - The proportion qualified to degree level or above is relatively low across Greater Lincolnshire, particularly in North East Lincolnshire at just over a quarter of the working age population.



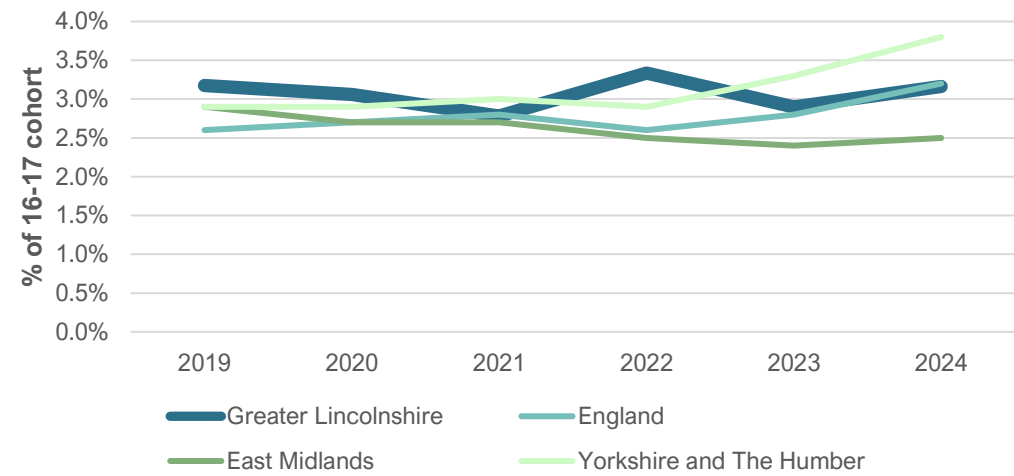
Source: ONS Annual Population Survey (2023)
Notes: National Vocational Qualifications (NVQ) estimates have been replaced with estimates on a Regulated Qualifications Framework (RQF) basis. RQF based estimates are available for the Jan 2022 - Dec 2022 survey period, while estimates prior to Jan 2022 - Dec 2022 remain on an NVQ basis.

NEET

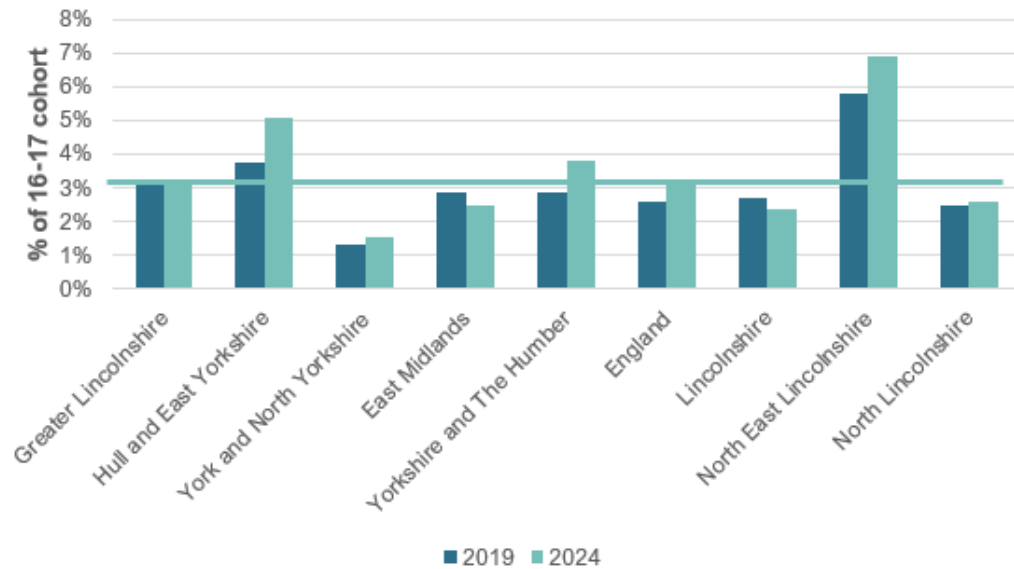
Having started amongst the highest rates of NEET five years ago, the rate in Greater Lincolnshire is now in line with the English average, however has climbed in North East Lincolnshire

- In 2019, the rate of 16-17 year olds who were not in education, employment or training (NEET) was 3.2% in Greater Lincolnshire, above regional and national comparators.
- The rate of NEET had fallen between 2022 and 2023 before rising slightly over the last year, although this follows national and regional trends.
- The rate of NEET is 3.2% in 2024, in line with the national rate and below rates seen in Hull and East Yorkshire, and across Yorkshire. But rates are above those seen in York and North Yorkshire.
 - Lincolnshire is in line with rate of NEET across the East Midlands.
 - North East Lincolnshire, the NEET rate has climbed steeply from an already high base. The rate of NEET in 2024 at 6.9% is over double the national rate.

Proportion of 16-17 year olds who are NEET (2019-24)



Proportion of 16-17 year olds who are NEET (2019 and 2024)



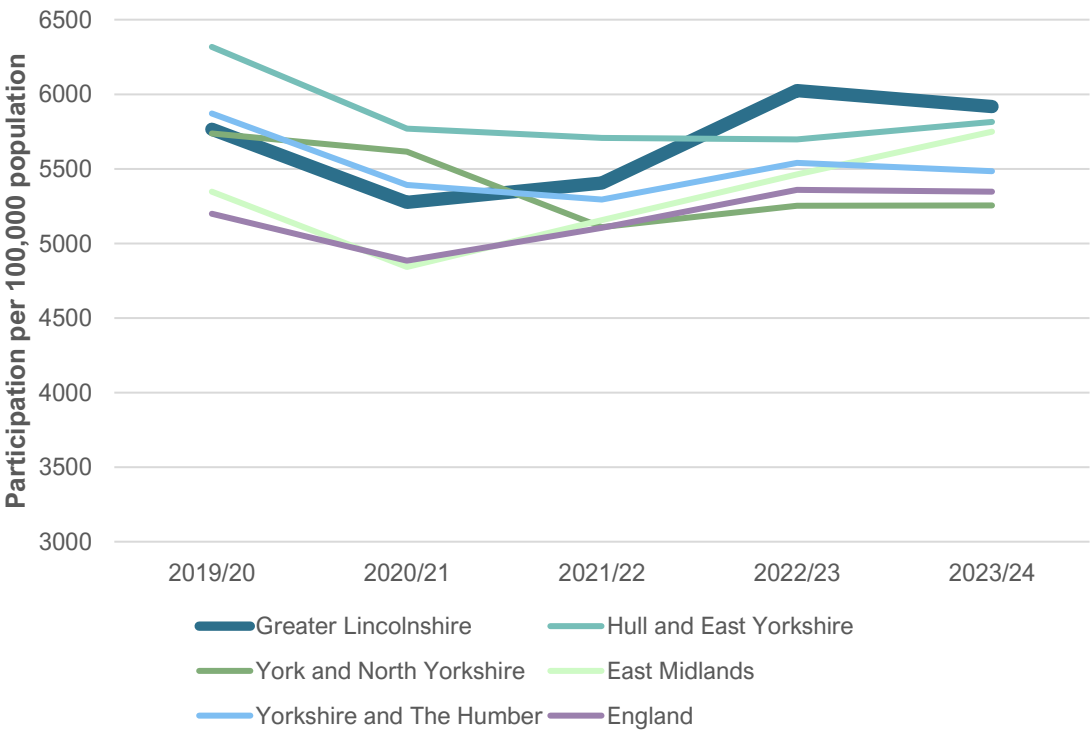
Source: DfE Participation in education, training and NEET age 16 to 17 by local authority (2023/24)

FE participation

Greater Lincolnshire has seen a rise in participation in Further Education and skills post pandemic, and amongst comparator areas has the highest FE participation rate

- Following trends seen across the country, education was disrupted during the pandemic, as seen by a fall in FE participation between the 2019/20 and 2020/21 academic years across areas.
- Participation bounced back strongly in Greater Lincolnshire, and participation in FE education and skills is the highest of comparator areas despite a slight fall over the most recent academic year.
- North and North East Lincolnshire is where participation is highest in Greater Lincolnshire where at least 6,000 people are participating in FE education and skills per 100,000 population.
- Participation across Greater Lincolnshire is 3.5% above pre-pandemic levels. Whereas participation in comparator CA areas remains 7% below levels in 2019/20 and 5% lower across Yorkshire and the Humber.
 - Although participation in the East Midlands is 10% higher and 5% higher across England.
 - In Lincolnshire, participation is 6% above pre pandemic levels, and 3% in North Lincolnshire. However, participation remains 6% below pre pandemic levels in North East Lincolnshire.

Further Education Participation rate (2019/20 - 2023/24)



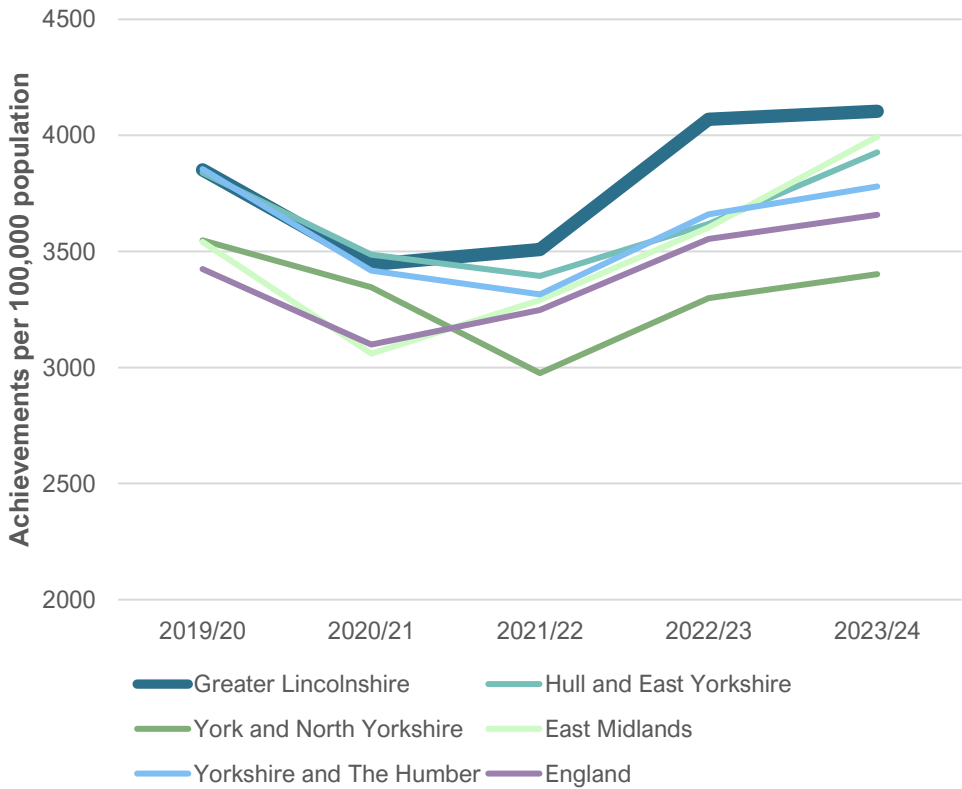
Source: DfE Further education and skills (2023/24)

FE achievements

Further Education achievements follow a broadly similar trend to participation on the previous slide, with Greater Lincolnshire continuing to have a relatively high proportion of achievements compared to other areas

- FE achievements again were impacted by the Pandemic but bounced back strongly in Greater Lincolnshire and in 2023/24 were 7% above levels in 2019/20.
- Achievements are relatively high in Greater Lincolnshire compared to other areas at over 4,000 FE achievements per 100,000 population.
 - Regionally, areas tend to have higher participation and achievements than compared to nationally.
 - Lincolnshire has seen a strong rise of 11% in achievements over this period, along with an 8% rise in North East Lincolnshire.
 - North East Lincolnshire has seen a 6.5% fall in achievements, but all three authorities have a relatively high achievement rate of at least 4,000 FE education and skills achievements per 100,000 population.
- Across East Midlands and nationally, there have been strong rises of 15.5% and 8.9% respectively.
 - Achievements in Yorkshire and the Humber have remained relatively flat.
 - York and North Yorkshire saw a steep decline to 2021/22 and has somewhat recovered but achievements remain 3% below 2019/20 and are relatively low compared to other areas.

Further Education Achievement Rate
(2019/20 - 2023/24)

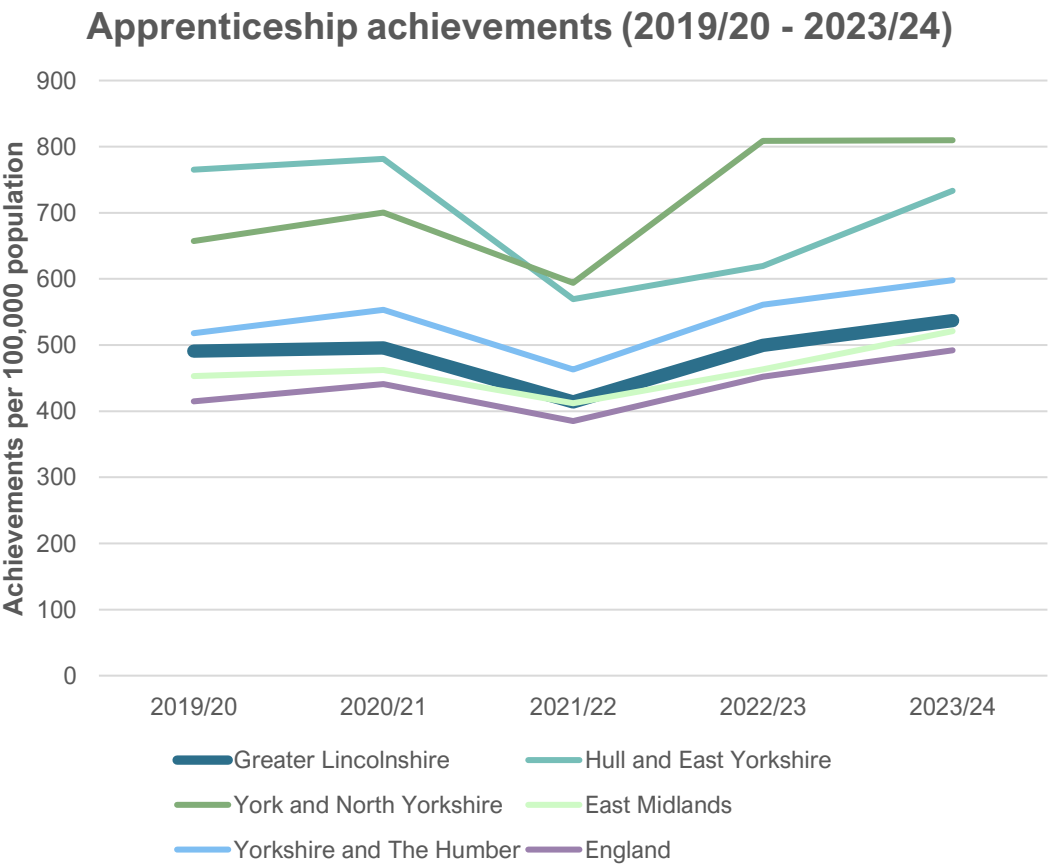


Source: DfE Further education and skills (2023/24)

Apprenticeship achievements

Achievements in apprenticeships have risen since 2021/22 but have consistently been amongst the lowest of comparator areas, unlike total FE education and skills achievements

- Achievements in apprenticeships have risen since 2021/22 and are now 11% higher than they were in 2019/20 in Greater Lincolnshire.
 - Achievements have risen by 18% regionally and 21% nationally.
- However, at 537 apprenticeship achievements per 100,000 population, achievement rates are relatively low in Greater Lincolnshire, particularly compared to regional CA areas of York and North Yorkshire and Hull and East Yorkshire.
 - Although Hull and East Yorkshire has seen a fall in achievements by 3%, York and North Yorkshire has seen a rise by a quarter since 2019/20.
- The apprenticeship achievement rate is similar across the three Greater Lincolnshire authorities at between 520-540 achievements per 100,000 population.
 - Lincolnshire has seen strongest growth of 12% since 2019/20, followed by 8% in North East Lincolnshire and 5.9% in North Lincolnshire.



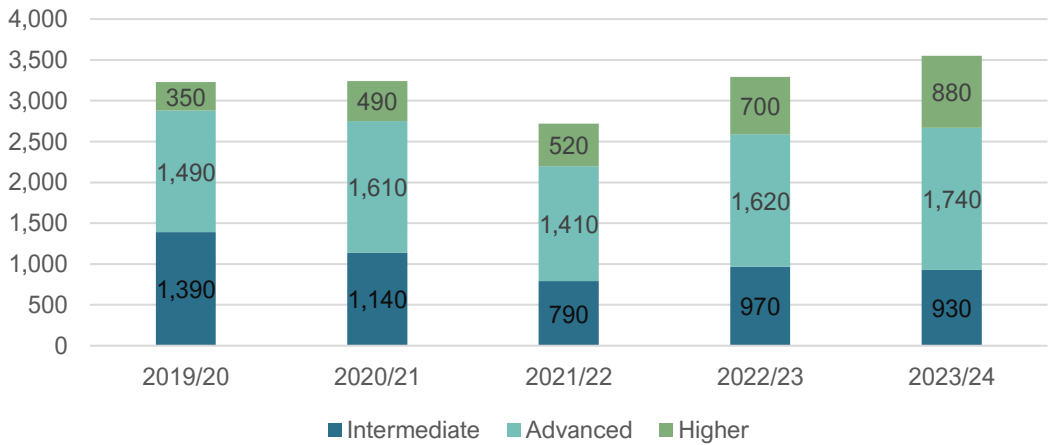
Source: DfE Further education and skills (2023/24)

Level of apprenticeship

Growth in apprenticeship achievements has been driven by advanced and higher level apprenticeships across the board

- The chart to the right shows how apprenticeship achievements have changed by level in Greater Lincolnshire. The rise in total achievements is driven by a rise in achievements in higher and advanced apprenticeships.
 - This follows patterns seen nationally and in other comparator areas, as can be seen in the table.
 - Intermediate achievements have fallen in Greater Lincolnshire, again following patterns seen across comparators apart from York and North Yorkshire, where achievements have risen across all levels.
- Particularly compared to other CA areas, achievement rates at intermediate level are low in Greater Lincolnshire.
- Achievement rates are also slightly reduced at a higher level despite strong growth since 2019/20. This is reflected in the previous slide where Greater Lincolnshire has one of lowest apprenticeship achievement rates of comparator areas.

Apprenticeships in Greater Lincolnshire
(2019/20 - 2023/24)



Achievement rate by level 2023/24
(growth since 2019/20)

Area	Intermediate	Advanced	Higher
Greater Lincolnshire	141 (-33%)	263 (+17%)	133 (+151%)
Hull and East Yorkshire	311 (-32%)	274 (+6%)	149 (+273%)
York and North Yorkshire	418 (+4%)	231 (+17%)	163 (+242%)
East Midlands	132 (-31%)	234 (+16%)	154 (+217%)
Yorkshire and the Humber	198 (-20%)	244 (+17%)	157 (+210%)
England	121 (-29%)	212 (+14%)	158 (+221%)

Source: DfE Further education and skills (2023/24)

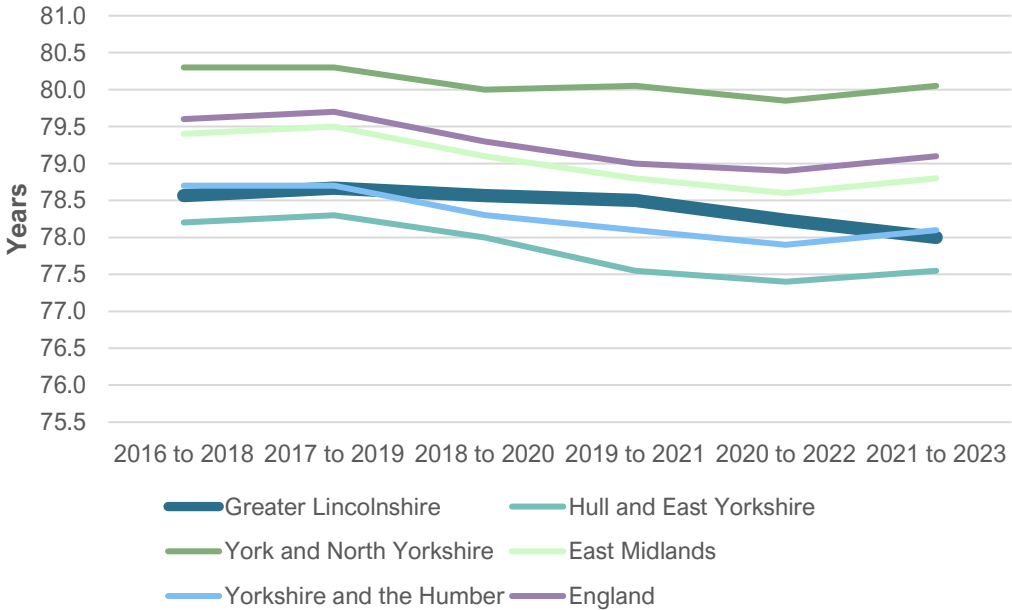
Life expectancy

Life expectancy in Greater Lincolnshire is in line with the Yorkshire average but has seen a slight decline over recent years unlike comparator areas

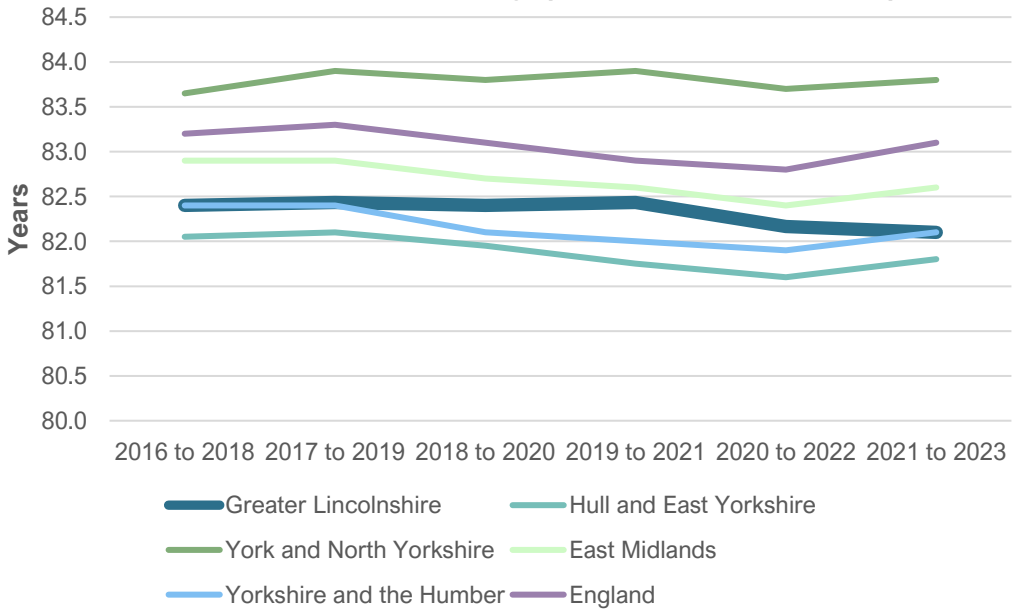
- Trends for women and men follow an almost identical pattern, with Greater Lincolnshire in line with the average for Yorkshire and the Humber but below most comparator areas, particularly York and North Yorkshire.
- Up to 2019-21, life expectancy was fairly in line with the East Midlands average, but has dipped since particularly for men over the period 2020-22 to 2021-23.
 - Across all areas, there was a slight decline between 2019-21 and 2020-21, impacted by the Pandemic. But between 2020-22 and 2021-23, life expectancy has fallen in Greater Lincolnshire, and more steeply for men, whereas all other areas have seen a slight rise. This is where Greater Lincolnshire bucks the trend.
- Within Greater Lincolnshire, life expectancy is lowest in North East Lincolnshire (77.5 for men and 80.9 for women). Life expectancy is similar in North Lincolnshire (78.1 for men and 82.8 for women) and Lincolnshire (78.4 for men and 82.6 for women).
 - For men, there has been a decline in life expectancy across the three authorities of Greater Lincolnshire between 2020-22 and 2021-22.
 - Whereas life expectancy has remained broadly constant in Lincolnshire and North Lincolnshire for women, but has fallen in North East Lincolnshire.

Source: ONS Health State Life Expectancy, all ages, UK (2023))

Male life expectancy (2016-18 to 2021-23)



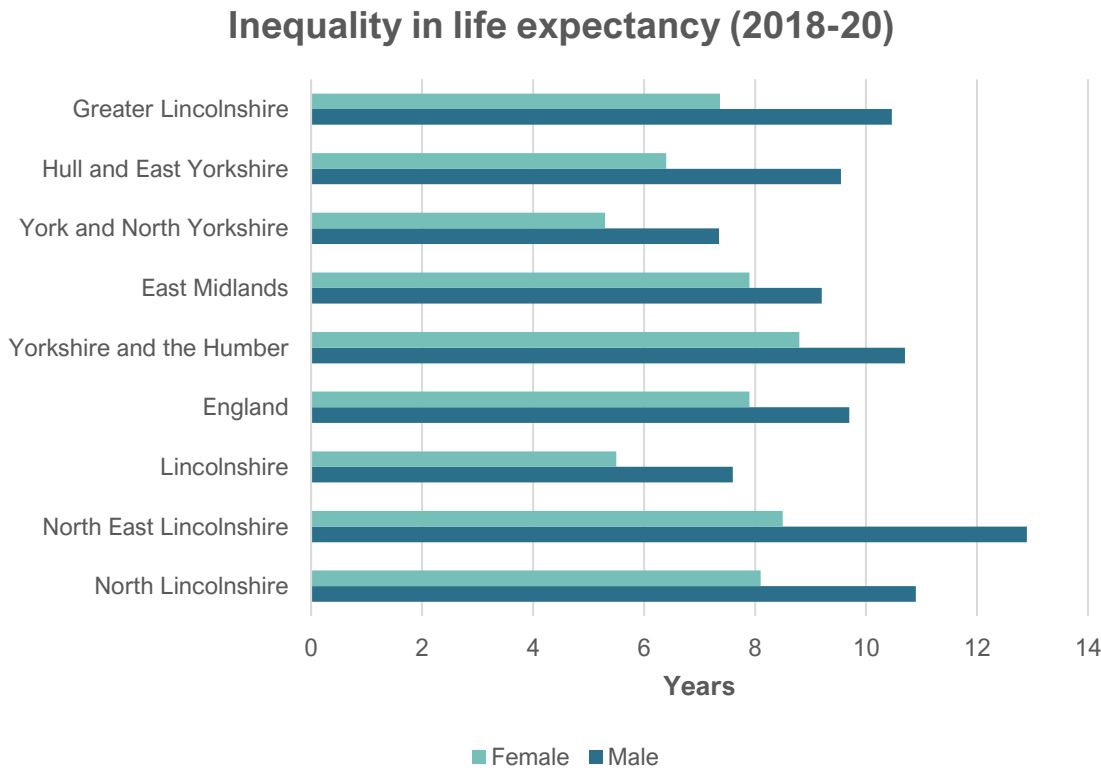
Female life expectancy (2016-18 to 2021-23)



Inequality in life expectancy

Those who live in more deprived areas tend to have a lower life expectancy, especially in North and North East Lincolnshire

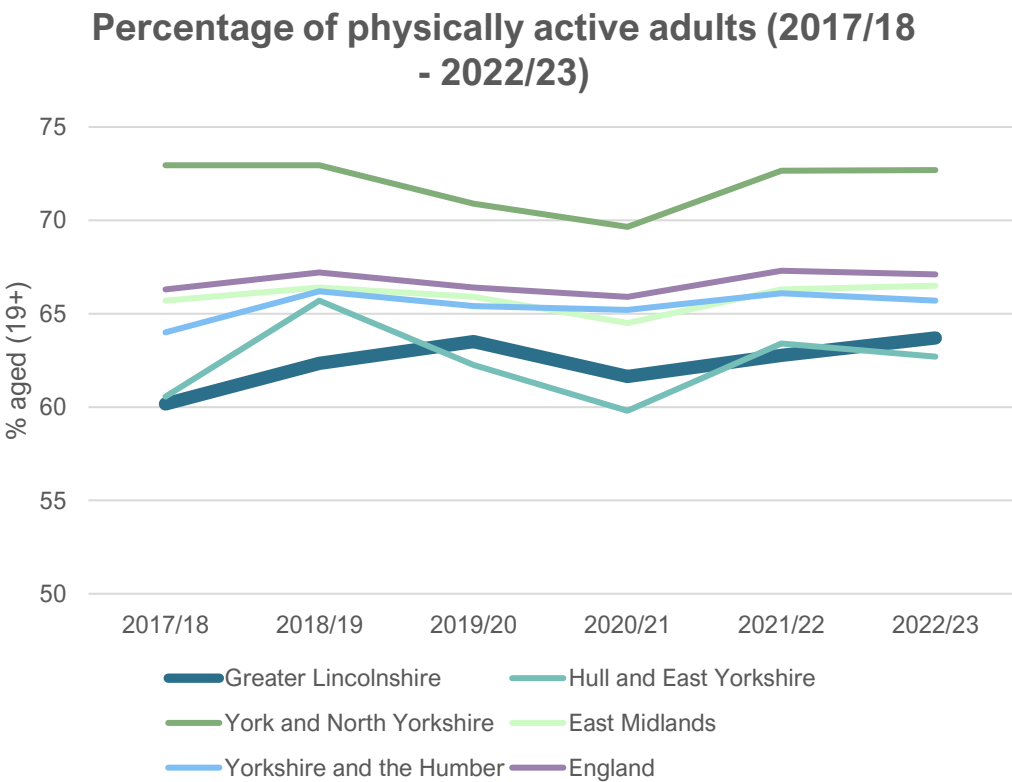
- The chart shows the slope index of inequality which represents the range in years of life expectancy across the social gradient from most to least deprived, based on a statistical analysis of the relationship between life expectancy and deprivation across all middle super output areas.
- Across Greater Lincolnshire, it is estimated that men from most deprived areas will live 10.5 years fewer and for women 8.8 years fewer than those from least deprived areas.
- This is in line with inequality found across Yorkshire and the Humber but above other comparator areas.
- Inequality is more pronounced in North and North East Lincolnshire, particularly for men, where those from most deprived areas are estimated to live at least 11 years less than those from least deprived areas.



Percentage of physically active adults

Greater Lincolnshire has consistently had amongst the lowest proportion of adults who are physically active than comparator areas despite an increase since 2017/18

- 63.7% of adults are classed as physically active in Greater Lincolnshire, rising from 60.2% since 2017/18.
- Despite an uptake, levels of physical activity remain low in Greater Lincolnshire particularly compared to York and North Yorkshire, but also below regional and national averages.
- However physical activity varies significantly within Greater Lincolnshire:
 - Almost two thirds of adults are physically active in Lincolnshire, in line with the national average.
 - Just over 65% of adults in North Lincolnshire are physically active, in line with the average across Yorkshire and the Humber.
 - Levels of physical activity are and have been consistently lower in North East Lincolnshire, with latest estimates that 59% of adults are physically active.

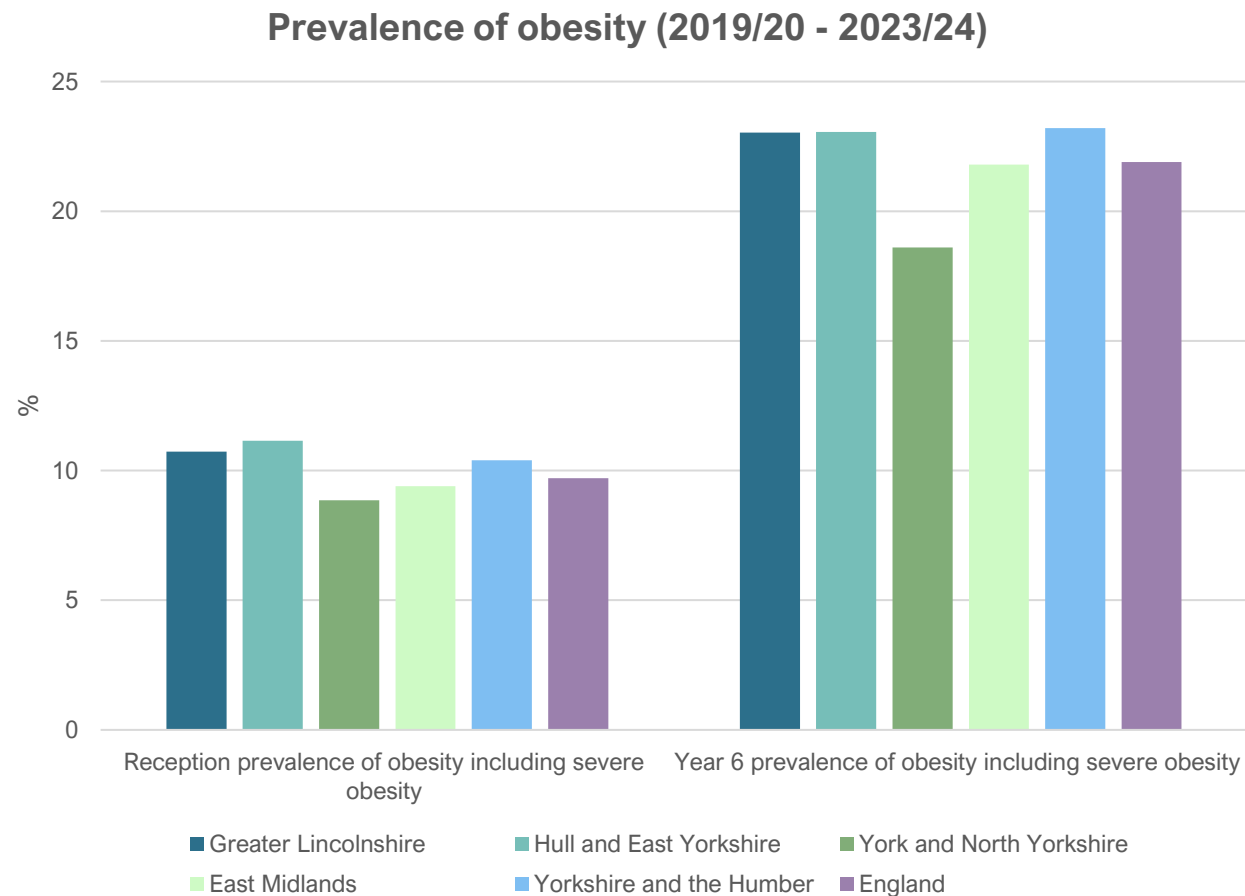


Source: Office for Health Improvement & Disparities Percentage of physically active adults (based on the Active Lives Adult Survey, Sport England) 2022/23
Notes: Adults classed as physically active if they engage in at least 150 moderate intensity equivalent (MIE) minutes physical activity per week in bouts of 10 minutes or more in the previous 28 days. This is expressed as a percentage of the total number of respondents aged 19 and over.

Prevalence of obesity

The prevalence of obesity in Greater Lincolnshire is broadly in line with comparator areas, although is slightly above national rates

- Across Greater Lincolnshire, around 11% of reception students are obese, rising to 23% of year 6 students.
- This is broadly in line with comparator areas, although slightly above levels in England of 9.7% and 21.9%, and York and North Yorkshire where levels are much reduced at 8.9% and 18.6%.
- Prevalence of obesity is highest in North East Lincolnshire at 11.3% of reception students and 24.3% of year 6 students.
- In North Lincolnshire, prevalence of obesity is lowest of three authorities for year 6 students and is in line with the national average.



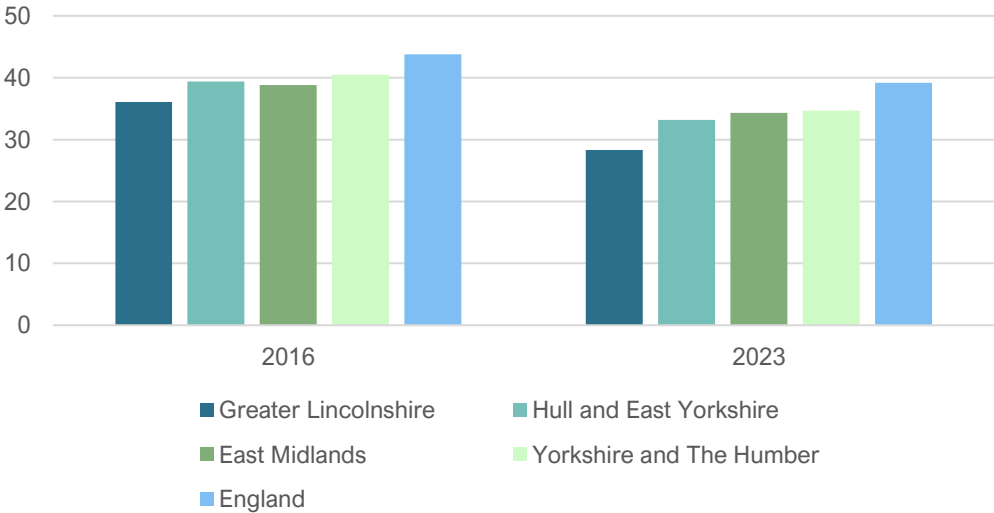
Source: Source: NHS England, National Child Measurement Programme (2023/24)

Walking & Cycling statistics

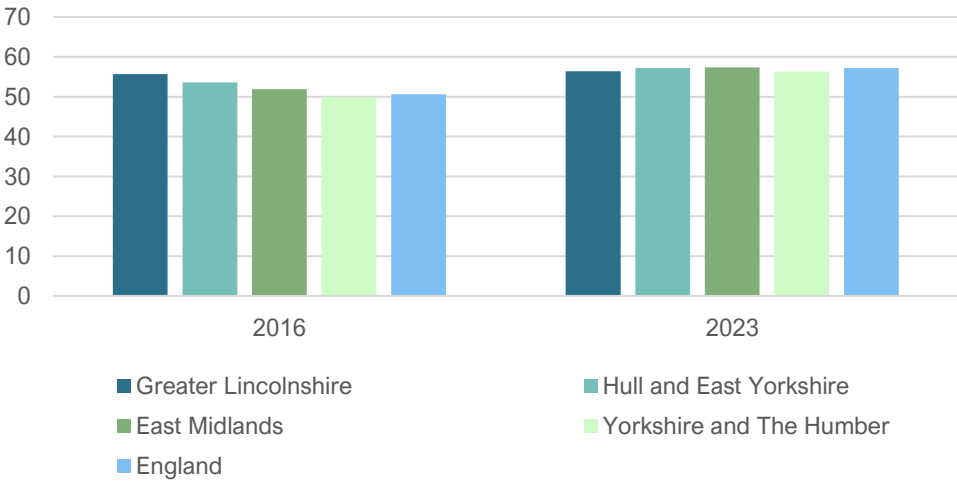
Fewer people in Greater Lincolnshire tend to walk or cycle for travel purposes, likely a reflection of the rural nature of the region

- The charts show the proportion of adults who walk or cycle at least once a week. The top chart for travel purposes, and the bottom chart for leisure purposes.
- Broadly, there has been a fall in the proportion walking or cycling once a week for travel purposes across all areas.
 - Fewer people in Greater Lincolnshire tend to walk or cycle for travel purposes (36% in 2016 down to 28% in 2023).
 - Lincolnshire has a higher proportion of 33%. This reflects the more urban nature of particularly Lincoln, where 44% walk or cycle for travel.
 - The proportion who walk or cycle for travel in North Lincolnshire is low at 22%.
- The proportion who walk or cycle for leisure purposes are broadly in line across comparator areas.

Proportion of adults who walk or cycle for travel purposes (2016 and 2023)



Proportion of adults who walk or cycle for leisure purposes (2016 and 2023)



Source: Department for Transport Walking and cycling statistics, England: 2023
Notes: Leisure refers to cycling for the purpose of health, recreation, training or competition, not to get from place to place. Travel refers to cycling to get from place-to-place, for example, commuting, visiting a friend, or going to the supermarket. There are no data for North Yorkshire.

Places

Places headlines – migration & commuting

- Net migration has risen between 2012 and 2023, driven largely by those from older age groups moving to Greater Lincolnshire in the latter stages of their career and/or for retirement.
 - However there has been a net outflow of young adults aged 20-24, explained by going to university, exploring other education or training opportunities, or looking for work elsewhere.
 - Lincolnshire accounts for 90% of net migration.
- Most households move within the sub-region. However, South Kesteven has a strong relationship with Peterborough to the South and both North and South Kesteven with Newark and Sherwood to the West.
 - Similarly, North and North East Lincolnshire share movements of households with Hull and East Riding of Yorkshire.
 - There is a pattern of household movements into Greater Lincolnshire from London and the South of the country, with more limited movements from the North and West. This is likely to reflect a level of retirement in-migration and relatively lower house prices allowing households to move more easily.
- Employment centres in Lincoln, Grimsby, Scunthorpe and Boston. The area with the highest employment is within Lincoln centre, accounting for 3% of total employment in Greater Lincolnshire.
- Journey times to employment sites are relatively fast in North East Lincolnshire across transport modes.
 - But less so in North Lincolnshire and particularly in Lincolnshire, where some areas, most notably East Lindsey, have longer journey times to employment sites by public transport and car than the average for rural areas.
 - Lincoln shows good connectivity across transport modes even compared to the urban national average.
 - The Humber gateway, Lincoln County Hospital and British Steel are relatively accessible by car but not by public transport for Greater Lincolnshire's residents.
- Resident earnings in Greater Lincolnshire have consistently been higher than workplace earnings.
 - It is likely that some residents may commute outside of Greater Lincolnshire, perhaps to access higher skilled jobs, given the relatively low proportion of employment in high skilled occupations in Greater Lincolnshire.
- In terms of commuting, the strongest relationships are between the Greater Lincolnshire authorities, particularly Lincoln and its neighbouring authorities, with some flows of workers from Newark and Sherwood and Bassetlaw outside of the sub-region.
 - But Peterborough is an important location for jobs from those in South Kesteven and South Holland.
 - North and North East Lincolnshire is connected to Hull and East Riding of Yorkshire, with travel over the Humber Bridge.

Places headlines – housing, broadband and energy

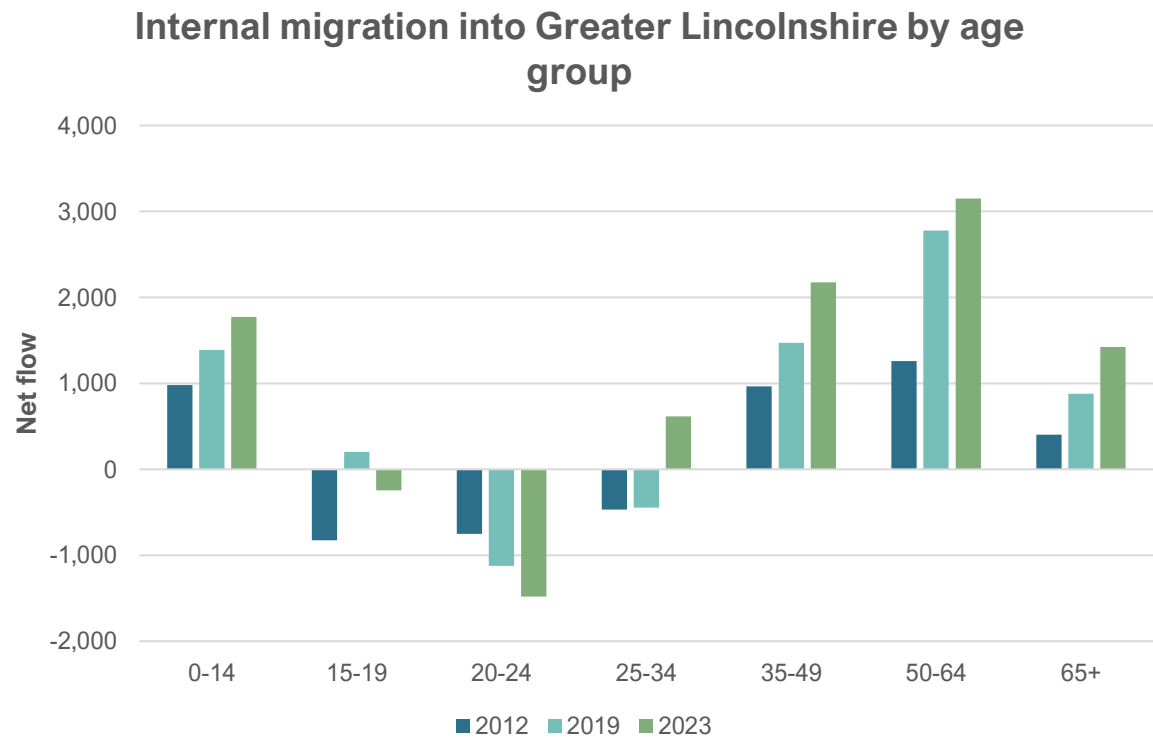
- Housing delivery in Greater Lincolnshire is 20% below new target levels mandated by the Government. Although no comparator area is currently hitting new housing targets.
- Housing supply is relatively in line with regional CA comparators, and above national levels using net additional dwellings per 10,000 population. Delivery varies significantly within Greater Lincolnshire. South Holland is the only area in Greater Lincolnshire where delivery is exceeding target and has highest supply levels.
 - West Lindsey and North Kesteven are driving delivery in Central Lincolnshire, with relatively high supply levels and both at or around respective target levels.
 - Lincoln has by far the lowest supply levels in Greater Lincolnshire and is almost two thirds off target levels.
 - Supply in North and North East Lincolnshire is the below Yorkshire average, and both are a quarter below target levels.
- Generally house prices are relatively low in Greater Lincolnshire. North and North East Lincolnshire are below the Yorkshire average, and below the East Midlands average apart from in North and South Kesteven.
 - But challenges remains for residents. Over 1 in 5 people earn below the living wage in Lincolnshire (rising to over a quarter in Boston, East Lindsey and West Lindsey) and North East Lincolnshire, and there are pockets of deprivation in employment and education, skills and training particularly in Eastern Lincolnshire, and North East Lincolnshire (Grimsby, Cleethorpes).
- Broadband coverage is variable but typically at or around the UK average. It is strongest in Lincoln, North Lincolnshire and Boston, where coverage is above the UK rate.
 - Coverage in North Kesteven, South Kesteven and South Holland is around the UK average.
 - Coverage is patchy in East and West Lindsey, where gigabit and full fibre coverage is lower than the UK average.
 - 5G coverage is strong compared to national coverage, particularly so in Lincoln, Boston and North East Lincolnshire.
- CO2 emissions have fallen by 43% in Greater Lincolnshire since 2005, in line with the fall in Yorkshire and nationally.
 - But emissions have fallen to varying degrees within Greater Lincolnshire - over 50% in North East Lincolnshire, 49% in North Lincolnshire, but only by a third in Lincolnshire.
 - However emissions per capita remain relatively high in Greater Lincolnshire, largely explained by industry, predominately in North Lincolnshire but also in North East Lincolnshire.
- Energy strengths in Greater Lincolnshire are reinforced, with a relatively high number of renewable electricity sites and capacity.
 - Renewable energy capacity has quadrupled between 2014 and 2023, well above rises regionally and nationally. North East Lincolnshire and Boston have highest capacity within Greater Lincolnshire.
- However, there are energy capacity issues which can slow Greater Lincolnshire's transition to net zero; water scarcity and increased risk of flooding; relatively high emissions from transport; and congestion issues especially in urban centres.

Internal migration

Net migration into Greater Lincolnshire has risen over the last decade, driven by inflows from those mid career with families, those towards the end of their career or early retirement. There tends to be an outflow of young adults.

- Net migration into Greater Lincolnshire has risen since 2012 from 1,565 to 5,151 in 2019 to 7,412 in 2023.
- This is largely accounted by people moving into Lincolnshire. The county made up 90% of net migration in 2023.
 - North East Lincolnshire reversed previous trends where there had been a net outflow of people, but still only made up less than 10% of net migration.
 - North Lincolnshire continues to account for a very small proportion of net migration. We will explore trends more over the next few slides
- There are clear inflows coming from those in the mid stages of their careers and their families, those entering the latter stages of their careers and/or early retirement, with the largest inflow amongst those aged 50-64.
- There is an outflow from younger age groups, particularly those aged 20-24, explained by going to university, exploring other education or training opportunities, or looking for work elsewhere.

Source: ONS Internal migration in England and Wales (2023)

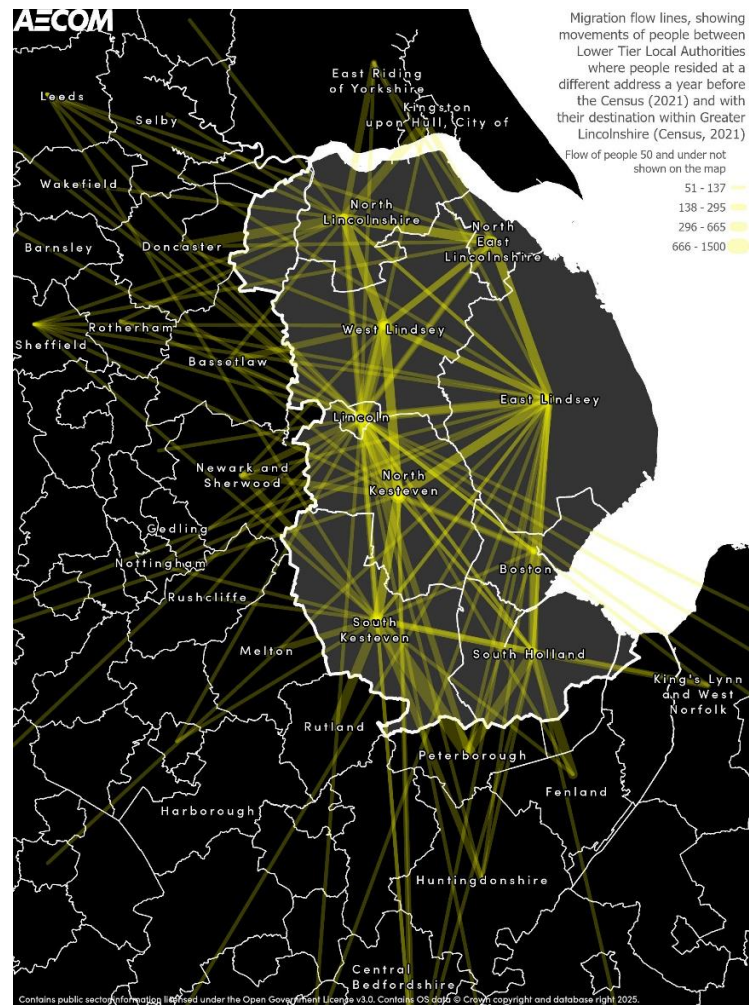


Internal migration

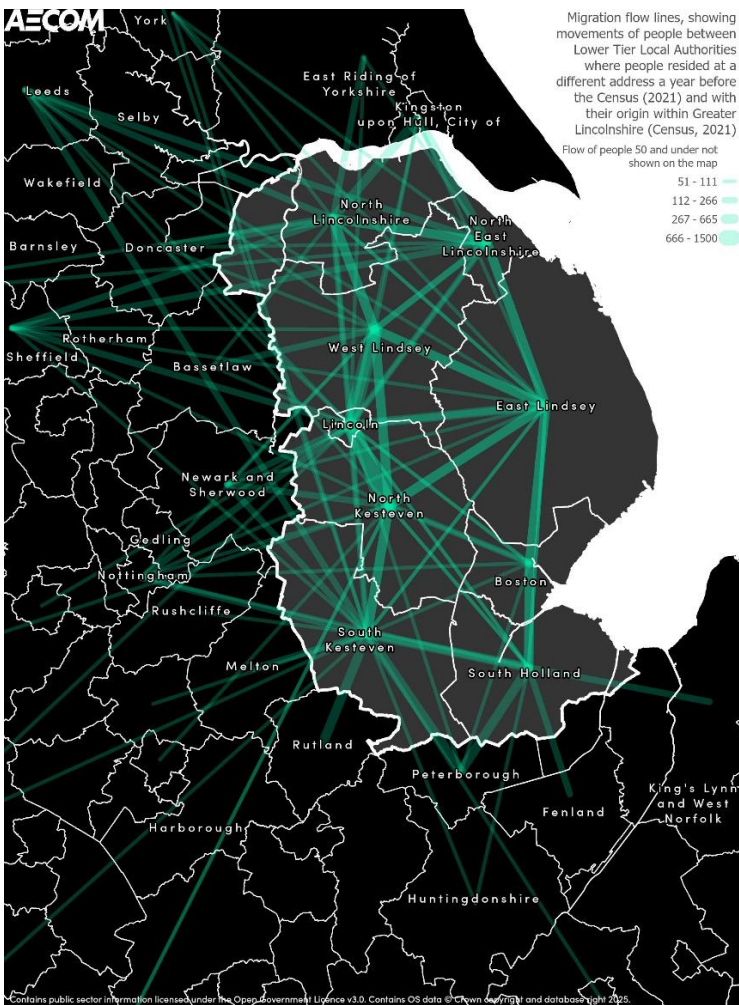
- Most households move within the sub-region. However, South Kesteven has a strong relationship with Peterborough to the South and both North and South Kesteven with Newark and Sherwood to the West. Similarly, North and North East Lincolnshire share movements of households with Hull and East Riding of Yorkshire.
- At the broader scale, there is a clear pattern of household movements into Greater Lincolnshire from London and the South of the country, with more limited movements from the North and West. This is likely to reflect a level of retirement in-migration and relatively lower house prices allowing households to move more easily.
- There are also some long distance moves into Greater Lincolnshire locations associated with movements of RAF personnel from other bases in the country.
- Focusing on movements to and from MSOAs shows a clear market associated with Lincoln with movements extending into West Lindsey and North Kesteven. Both Scunthorpe and Grimsby and Cleethorpes in the North also have strong household movement patterns centred on these towns but these are reasonably contained within their local authority areas.
- In the South, Grantham's market is clear in terms of household movements at the localised level, with similar patterns in Spalding, Boston and Stamford.
- The towns on the East coast and within East Lindsey have a much more dispersed pattern of movements associated, albeit they appear connected to each other.
- The next slide shows maps used in Greater Lincolnshire's housing evidence base which outline household migration within and out of Greater Lincolnshire.

Internal migration maps

Household moves with Greater Lincolnshire Destination

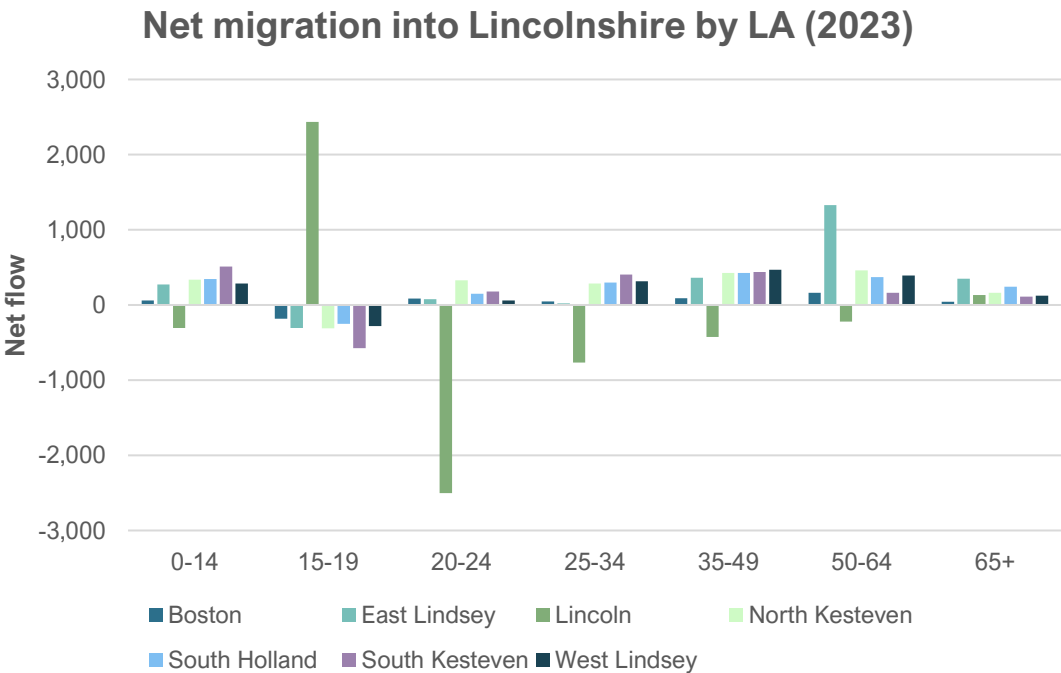
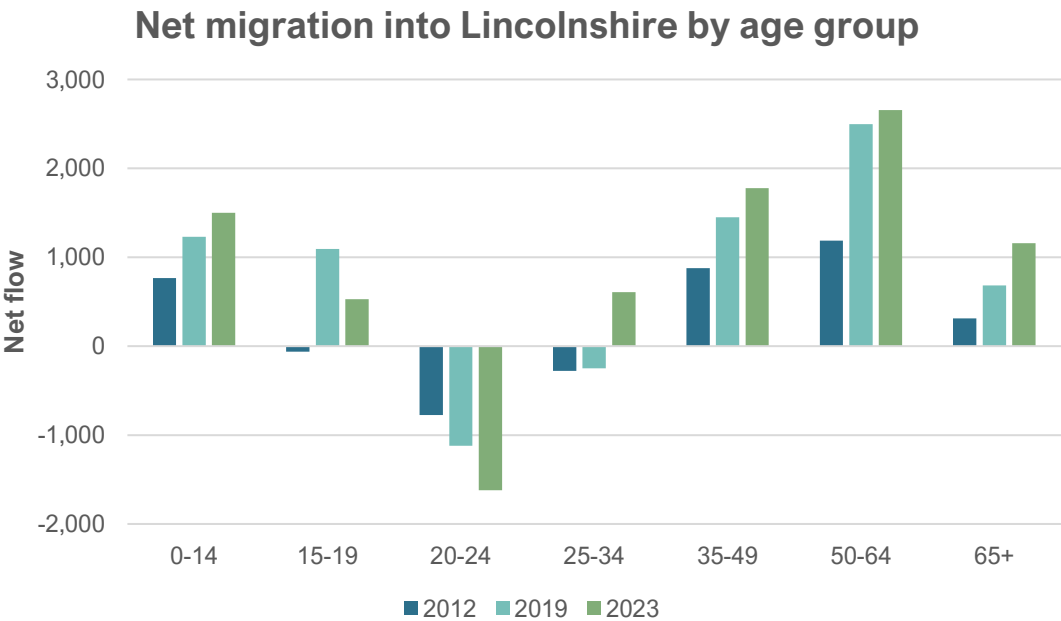


Household moves with Greater Lincolnshire Origin



Internal migration Lincolnshire

Lincolnshire consistently makes up the majority of overall net migration in Grater Lincolnshire (89% in 2023), therefore largely follows Greater Lincolnshire trends, but there is a net inflow of people aged 15-19 moving to study in Lincoln, followed by a large outflow for those aged 20-24 as they leave Lincoln to return back from their studies. Net migration has increased from 2,025 in 2012 to 5,587 in 2019 to 6,605 in 2023. Focusing on 2023, there was a fall in net migration in Lincoln, largely explained by those leaving after university studies, but also a continual outflow amongst older age groups. This may be explained by people moving to other parts of Lincolnshire apart from Boston, where there is only a relatively small net internal inflow of people moving to the area.

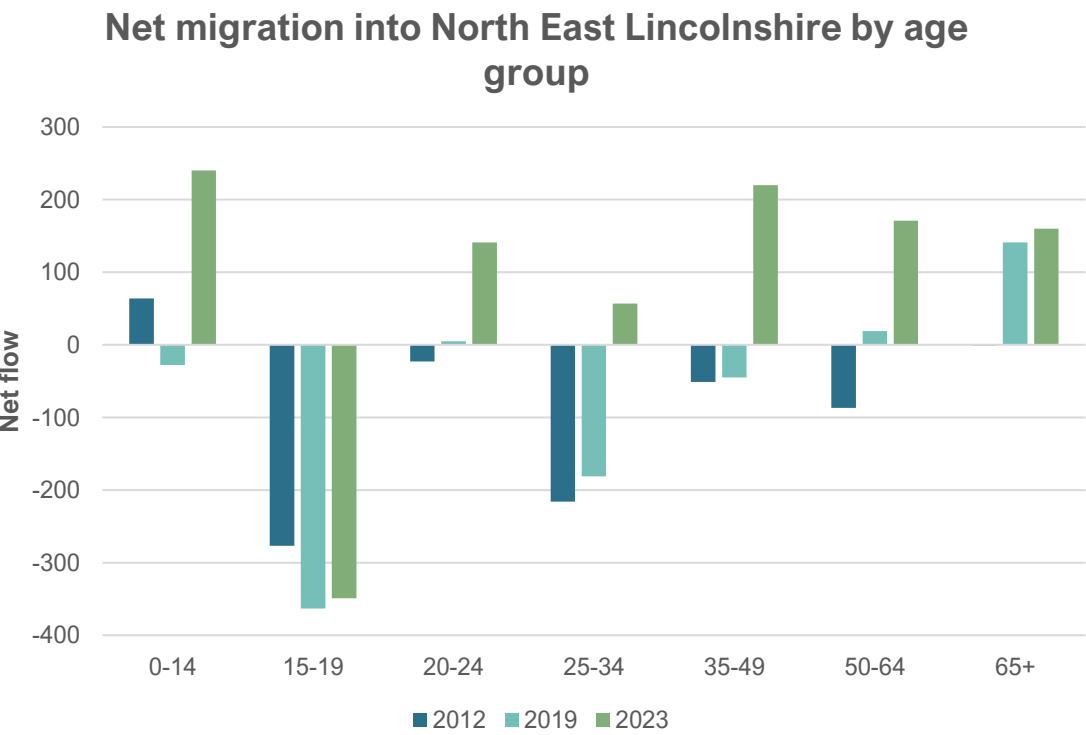


Source: ONS Internal migration in England and Wales (2023)

Internal migration North East Lincolnshire

In previous years there had been a net outflow of people from North East Lincolnshire, largely amongst those of school leaving age and those in their early careers, but in 2023 there was a net inflow of people moving into North East Lincolnshire

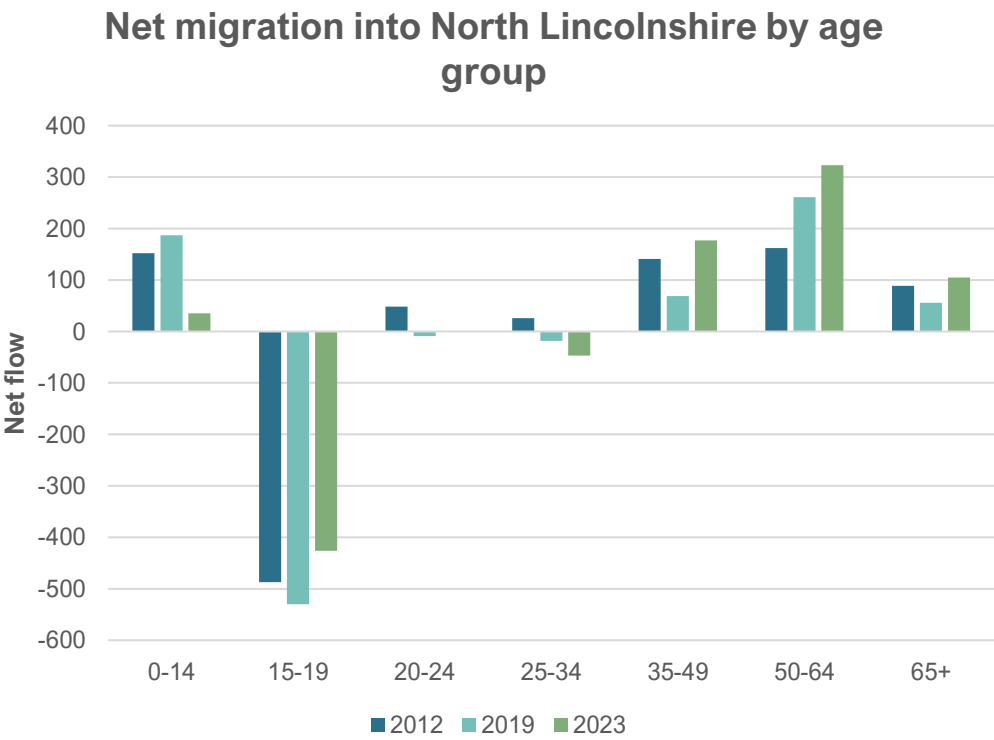
- In 2012 and 2019 there was a net outflow of people moving out of North East Lincolnshire of 591 and 452 people respectively.
- This was largely driven by people moving out of the area aged 15-19, either to pursue university, further education or training opportunities or for employment, as well as an outflow of people aged 25-34, likely explained by pursuing work opportunities elsewhere.
- But in 2023 there was a net inflow of people moving into North East Lincolnshire. There was a net inflow of people aged 20-24, perhaps moving back to the area having studied at university elsewhere in the country.
- There was also a net inflow of people in their mid-late careers, perhaps moving to the area along with their families, as seen by a net inflow of children aged 0-14 into North East Lincolnshire.
- Although overall North East Lincolnshire still accounted for a relatively small 9% of net migration in Greater Lincolnshire in 2023.



Internal migration North Lincolnshire

There has been a consistent outflow of people around school leaving age and inflow of people either in mid-late stages of their career or entering retirement. North Lincolnshire accounts for a very small proportion of overall net migration in Greater Lincolnshire.

- Following trends seen in North East Lincolnshire, there has consistently been an outflow of people leaving North Lincolnshire aged 15-19 to pursue further studies or for employment opportunities.
- There has been an inflow of people aged 35-49 and 50-64, which has increased to 2023, as they enter mid-late career stage and/or moving as they retire.
- People may be moving to the area as they look to retire, taking advantage of lower house prices in North and North East Lincolnshire, which will be reviewed later in the section.
- Although North Lincolnshire only accounts for a very small proportion of overall migration flows in Greater Lincolnshire – in 2023, North Lincolnshire made up 2% of overall net migration in Greater Lincolnshire.



Journey times to employment centres

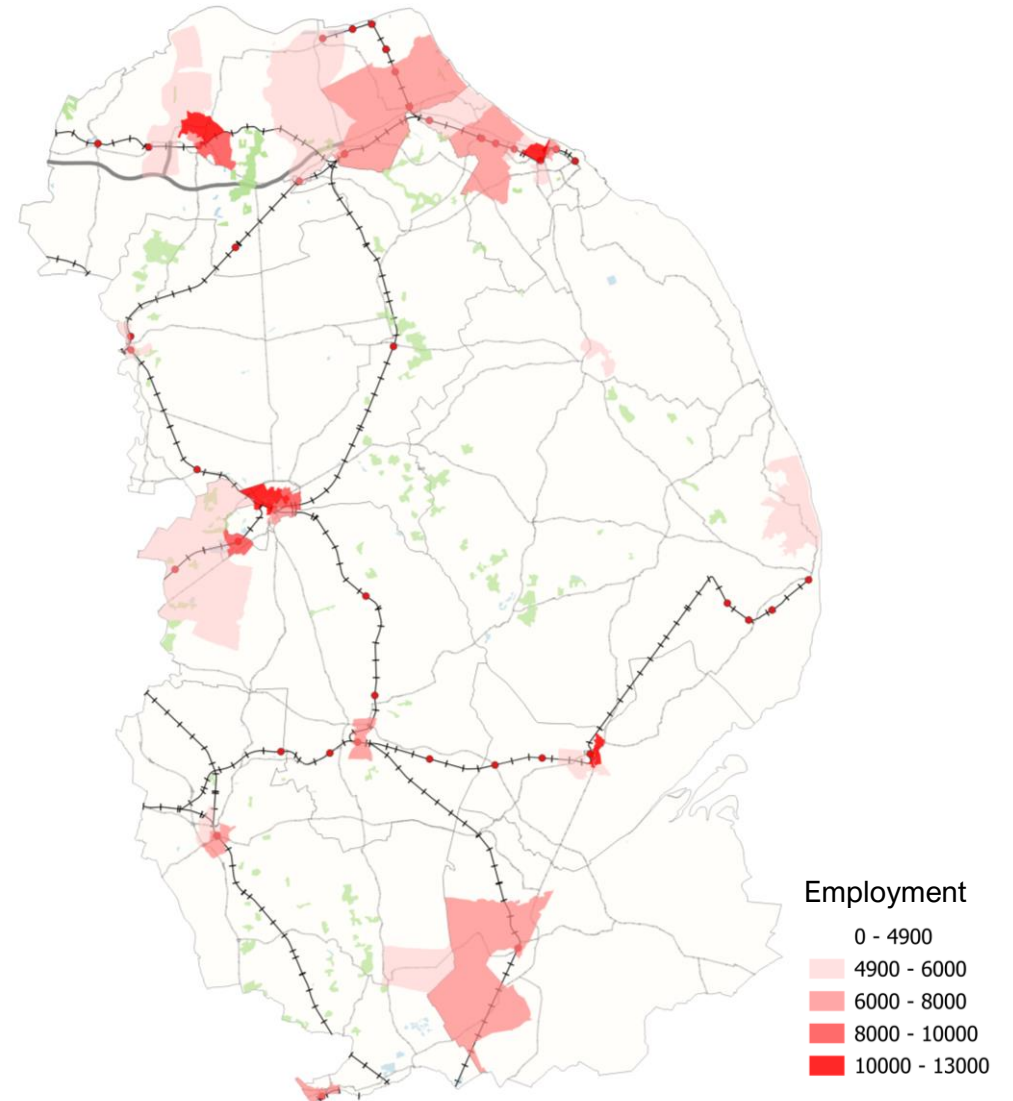
- This table presents travel times to employment sites of different sizes (100-499 jobs, 500-4,999 jobs, and 5,000+ jobs) indexed to the England average (1.0) for different modes of transport (public transport, cycling, car, and walking) in 2019. A value above 1.0 indicates longer travel times relative to the national average, while a value below 1.0 indicates shorter travel times.
- Travel times in North East Lincolnshire are generally below the national average across employment site sizes, showing relatively strong connectivity to employment centres. However, North Lincolnshire travel times are generally longer to larger employment sites, at least 20% longer across modes for sites with 500-5,000 jobs.
- Lincolnshire has the longest journey times withing Greater Lincolnshire apart from Lincoln, tending to be longer than the English average and in some places, above the average for rural areas. Journey times in East and West Lindsey, particularly to large employment sites in East Lindsey are longest across modes – over triple the English average by public transport or car.

Area	Employment site with 100-499 jobs				Employment site with 500-4,999 jobs				Employment site with 5,000+ jobs			
	Public Transport	Cycle	Car	Walk	Public Transport	Cycle	Car	Walk	Public Transport	Cycle	Car	Walk
North East Lincolnshire	0.8	0.9	0.9	0.7	0.9	0.9	0.9	0.8	0.9	0.7	0.8	0.8
North Lincolnshire	1.0	1.1	1.0	1.2	1.3	1.5	1.2	2.0	1.0	1.1	1.0	1.2
Lincolnshire	1.5	1.4	1.2	1.9	1.4	1.4	1.2	1.9	1.7	2.0	1.7	1.6
Boston	1.4	1.3	1.1	1.8	1.3	1.2	1.1	1.4	1.9	3.0	2.0	2.1
East Lindsey	1.8	1.5	1.3	2.4	1.6	1.8	1.3	2.6	3.0	3.7	3.6	2.1
Lincoln	0.9	0.9	1.0	0.7	0.8	0.9	0.9	0.7	0.5	0.4	0.6	0.4
North Kesteven	1.4	1.2	1.1	1.6	1.5	1.5	1.2	2.1	1.5	1.8	1.5	1.6
South Holland	1.7	1.3	1.1	1.8	1.8	1.6	1.3	2.3	1.7	1.4	1.2	1.5
South Kesteven	1.5	1.4	1.2	1.9	1.2	1.3	1.1	1.7	1.3	1.6	1.3	1.5
West Lindsey	1.8	1.9	1.4	3.2	1.5	1.6	1.2	2.3	1.6	2.3	1.7	1.9
Urban	0.8	0.9	0.9	0.7	0.8	0.9	0.9	0.7	0.8	0.8	0.9	0.8
Rural	2.0	1.6	1.3	2.6	1.7	1.6	1.3	2.2	1.8	1.9	1.6	1.8

Areas of high employment

Employment in Greater Lincolnshire is concentrated most densely around the town centres of Lincoln, Grimsby, Scunthorpe and Boston

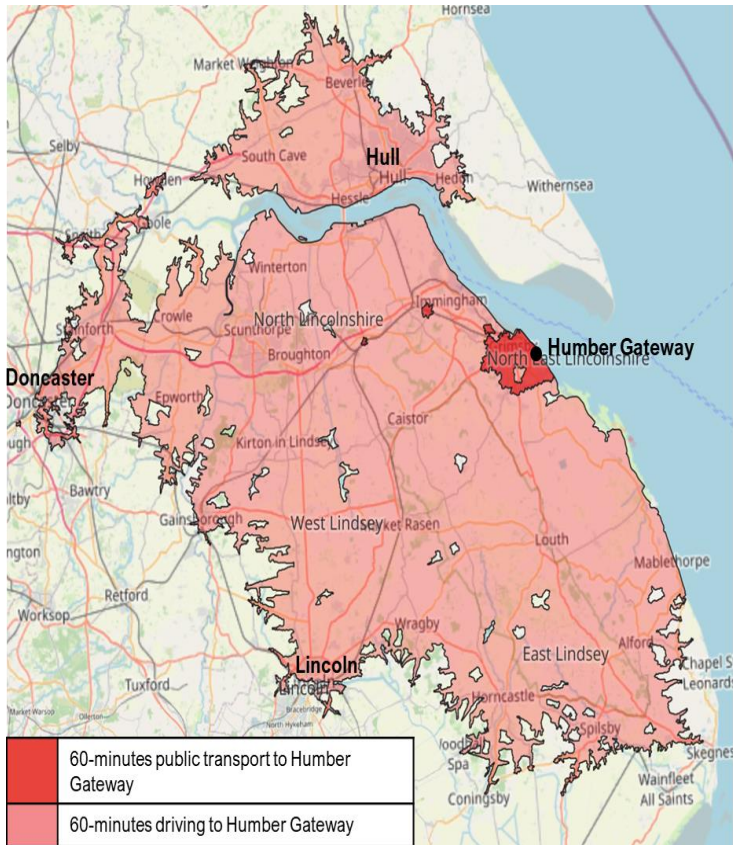
- The map of the right shows the highest areas of employment in Greater Lincolnshire in 2024.
- There are 32 MSOA, shown on the map, in Greater Lincolnshire that represent 53% of employment. Employment is most concentrated in the centres of Lincoln, Grimsby, Scunthorpe and Boston, as seen by areas which are in darker red on the map.
- The area with the highest employment is within Lincoln centre, accounting for 3% of total employment in Greater Lincolnshire. This area covers the town centre, University of Lincoln and Lincoln County Hospital.
- Another area of high employment is around British Steel at Scunthorpe and Normanby Enterprise Park in North Lincolnshire.
- Likewise, Grimsby is an area of high employment in North East Lincolnshire, with notable employment around Grimsby Docks and Humber Gateway.
- Boston town centre is also an area with high employment in Lincolnshire.



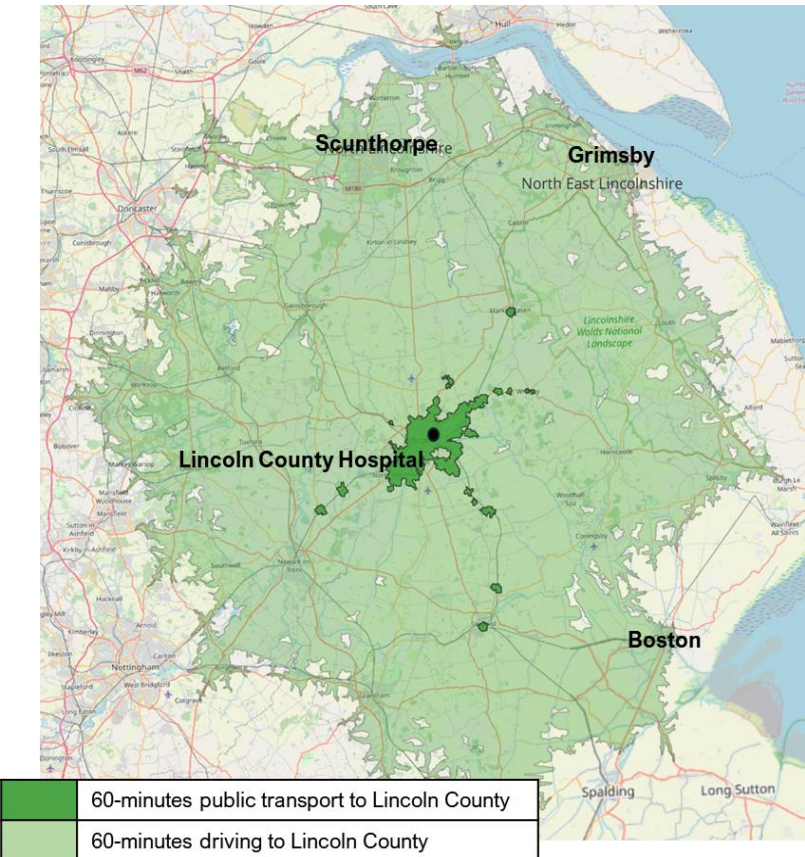
Connectivity to employment sites

The maps below show connectivity to key employment sites of the Humber Gateway, Lincoln Hospital and British Steel, within 60 minutes by public transport and driving. By car, there is broad accessibility throughout Greater Lincolnshire to the three key employment sites, particularly for Lincoln hospital. However, using public transport, many residents in Greater Lincolnshire would be unable to access the three key employment sites within an hour, brought into focus by the small darker shaded areas.

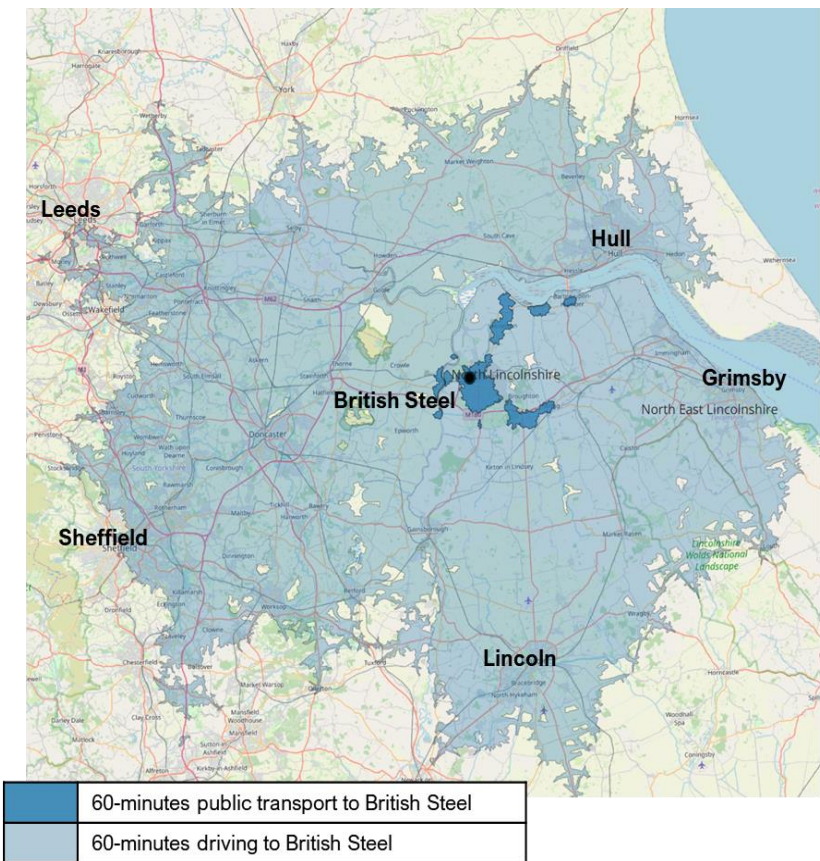
Connectivity by driving and public transport to Humber Gateway



Connectivity by driving and public transport to Lincoln County Hospital



Connectivity by driving and public transport to British Steel



Workplace vs resident earnings

Resident earnings in Greater Lincolnshire have consistently been higher than workplace earnings

- In 2019, workplace earnings were 3.9% lower than resident earnings. Although the gap has closed somewhat, workplace earnings remain 3% below resident earnings.
 - The gap is most pronounced in Lincolnshire, where workplace earnings are 4% below resident earnings.
- It is likely that some residents may commute outside of Greater Lincolnshire, perhaps to access higher skilled jobs, given the relatively low proportion of employment in high skilled occupations in Greater Lincolnshire.
- As we will explore over the next couple of slides, Peterborough is an important location, particularly for areas to the South including South Kesteven and South Holland, with strong commuting inflows.
- There are inflows into Hull and East Riding of Yorkshire from North and North East Lincolnshire.

Workplace vs resident earnings (2015-24)



Area	Workplace (2019)	Resident (2019)	Workplace (2024)	Resident (2024)
Lincolnshire	£26,043	£27,279	£32,158	£33,576
North East Lincolnshire	£25,321	£27,457	£34,509	£34,575
North Lincolnshire	£28,944	£28,468	£34,480	£34,840

Source: ONS Annual Survey of Hours and Earnings (2024)

Commuting patterns

Housing evidence base work identifies four broad areas that cover Greater Lincolnshire:

- A large market centred on Lincoln which, according to the CLG research, includes the northern half of South Kesteven, Lincoln, North Kesteven, West Lindsey, as well as small parts of Bassetlaw, East Lindsey and Melton.
- Two smaller northern markets centred on Scunthorpe and Grimsby
- A small coastal market centred on Skegness
- A market associated with Boston and stretching to Spalding.
- A larger market centred on Peterborough, extending into the South of the County including the southern half of South Kesteven and a small area of South Holland.

Commuting patterns:

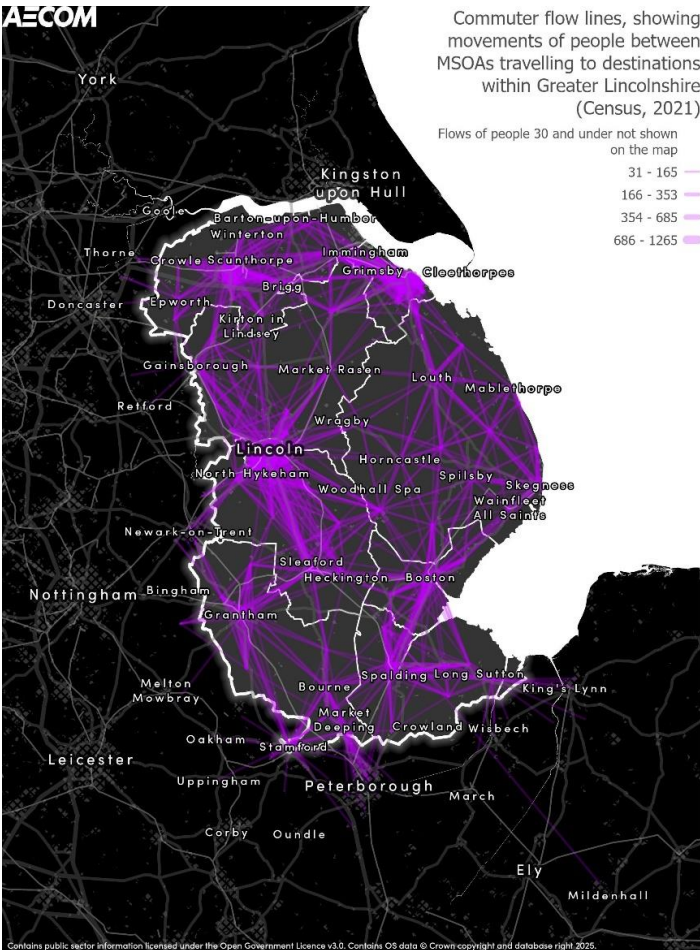
- Strongest relationships are between the Greater Lincolnshire authorities, particularly Lincoln and its neighbouring authorities, with some flows of workers from Newark and Sherwood and Bassetlaw outside of the sub-region.
- Peterborough, to the South, is associated with commuting flows both to and from South Kesteven and South Holland, but the strongest flow is into Peterborough.
- North and North East Lincolnshire is connected to Hull and East Riding of Yorkshire, with travel over the Humber Bridge.
- The full extent of commuting to London from Greater Lincolnshire is not likely to be shown by the Census data because of restrictions in place at the time of the Census but flows are evident even so.

Source: Greater Lincolnshire Housing Pipeline Evidence Base (2025); 2021 Census

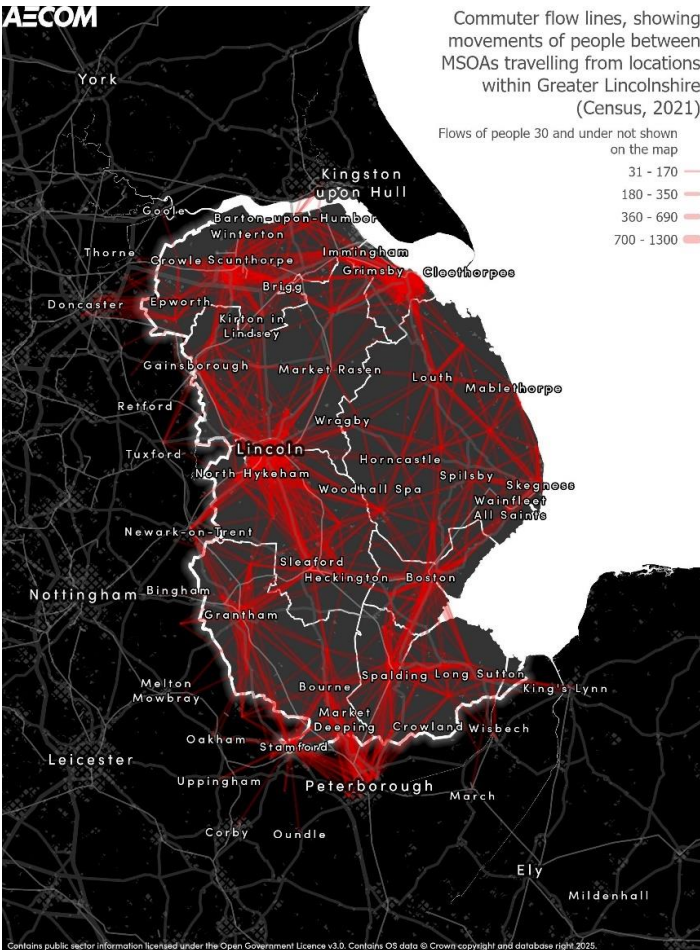
Notes: Commuting data has limitations due to the Covid restrictions in place at the time of the Census which meant a large proportion of the workforce (in particular sectors) was working from home rather than travelling to work. Similarly, household moves were more limited in the year to the Census so migration was lower than in previous years. Whilst limited, the Census 2021 is likely to give a reasonable indication of the pattern of movements albeit it is likely to underestimate the scale or intensity.

Commuting maps

Commuting with Greater Lincolnshire Destination



Commuting with Greater Lincolnshire Origin



Housing – delivery vs targets

- The left hand table shows how housing delivery in areas of Greater Lincolnshire is performing against updated targets mandated by the Government last year.
- Historically, housing delivery has been below the new targets, as seen by average delivery between 2006 and 2024. Over recent years, housing delivery has been closer to targets, and has exceeded targets in South Holland. Across Central Lincolnshire, delivery is also closing on target levels, driven by delivery in West Lindsey and North Kesteven.
- Housing delivery in Greater Lincolnshire between 2021/22 – 2023/24 averaged 4,479 net additional dwellings - 20% below target levels. This varies significantly within Lincolnshire but overall the County is 19% below target levels. North and North East Lincolnshire are around a quarter below target levels.
- None of the comparator areas are currently hitting target levels.

Area	Target		Delivery - net additions	
	Standard method 2024	Adopted LP requirement	2021/22 - 2023/24	2006-24
North East Lincolnshire	623	649	469	343
North Lincolnshire	637	754	480	451
Lincolnshire	4,354		3,530	
Central Lincolnshire	1,552	1,102	1,422	
Boston	356	310	317	277
East Lindsey	1,009	553	544	496
South Holland	542	467	680	426
South Kesteven	895	650	567	580
Greater Lincolnshire	5,614	4,485	4,479	2,573
Lincoln	413		148	
North Kesteven	652		648	
West Lindsey	487		626	

Area	Target (2024)	Delivery (2021/22 – 2023/24)	% difference
Greater Lincolnshire	5,614	4,479	-20.2%
Hull and East Yorkshire	2,918	2,535	-13.1%
York and North Yorkshire	5,461	3,441	-37.0%
East Midlands	25,764	23,347	-9.4%
Yorkshire and The Humber	24,957	19,258	-22.8%
England	370,408	229,942	-37.9%

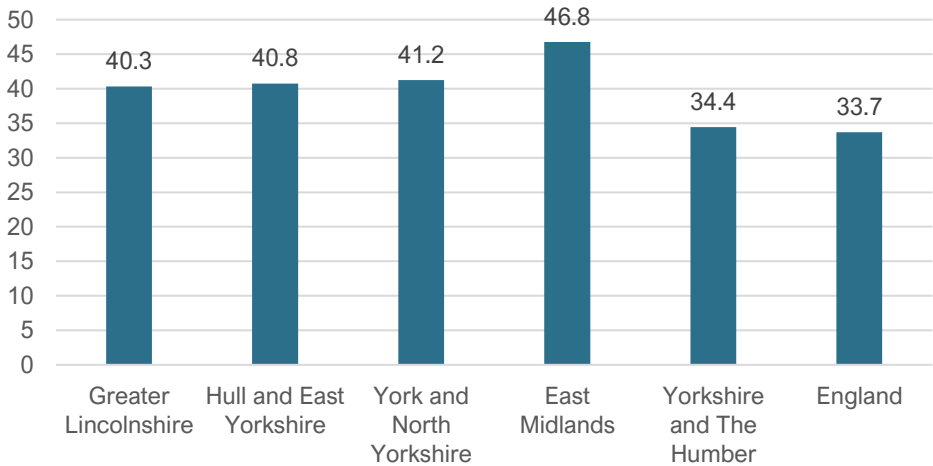
Source: MHCLG Standard Method calculations December 2024; Greater Lincolnshire Housing Pipeline Evidence Base (2025); Central Lincolnshire 2023 Local Plan
Notes: Central Lincolnshire Joint Plan area covers Lincoln, North Kesteven and West Lindsey. Delivery data between 2006 and 2024 where not available for Central Lincolnshire areas and therefore cannot be calculated for Lincolnshire.

Housing supply

Proxying for housing supply by using net additional dwellings per 10,000 residents shows that supply is above national and Yorkshire levels, and broadly in line with other CA areas

- As reported on the last slide, no area is currently hitting new housing targets, but supply in Greater Lincolnshire is above national and Yorkshire levels, also seen on the last slide where Greater Lincolnshire is closer to hitting respective target levels.
- Delivery is relatively in line with other CA areas, although York and North Yorkshire are further away from hitting housing targets, as seen on the last slide.
- East Midlands is closest to hitting housing targets, driven in areas currently delivering above target levels in Nottingham, Rushcliffe, South Derbyshire, Bassetlaw, and South Holland.
- Delivery is mixed across Greater Lincolnshire. South Holland is the only area in Greater Lincolnshire where delivery is exceeding targets and has highest supply levels (net additional dwellings per 10,000 population).
 - West Lindsey and North Kesteven are driving delivery in Central Lincolnshire, with relatively high supply levels and both at or around respective target levels.
 - Lincoln has by far the lowest supply levels in Greater Lincolnshire and is almost two thirds off target levels.
 - Supply in North and North East Lincolnshire is the below Yorkshire average, and both are a quarter below target levels.

Net additional dwellings per 10,000 population (2021/22 – 2023/24)



Area	Delivery	Population	Delivery (per 10,000 population)
Lincolnshire	3,530	782,808	45.1
North East Lincolnshire	469	158,335	29.6
North Lincolnshire	480	170,087	28.2
Central Lincolnshire	1,422	322,397	44.1
Boston	317	71,367	44.4
East Lindsey	544	145,371	37.4
South Holland	680	97,915	69.4
South Kesteven	567	145,758	38.9
Lincoln*	148	103,314	14.3
North Kesteven*	648	121,203	53.5
West Lindsey*	626	97,880	64.0
Greater Lincolnshire	4,479	1,111,230	40.3

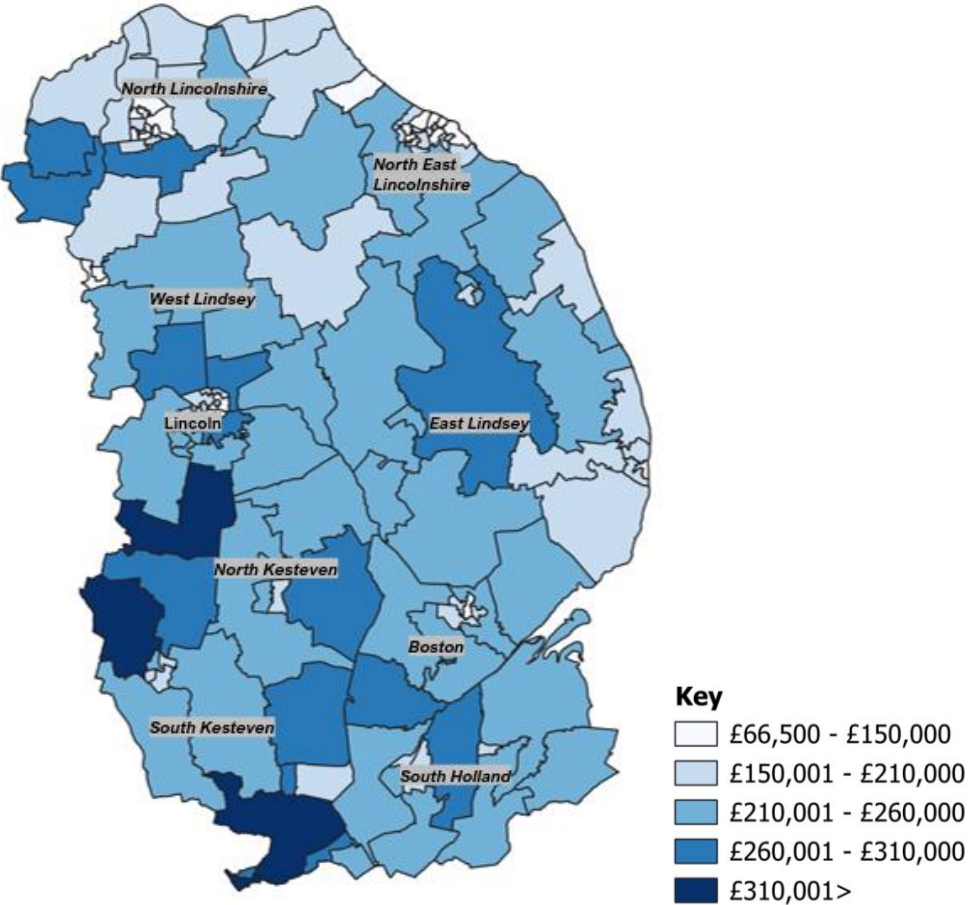
Source: MHCLG Standard Method calculations December 2024; ONS Population Estimates (2023)
Notes: *Central Lincolnshire Joint Plan area covers Lincoln, North Kesteven and West Lindsey.

Median prices & affordability ratio

The housing affordability ratio reports that property may be considered relatively affordable compared to regional averages, and may help to explain net inflows into the region, particularly amongst those aged 50 and over, looking or already entering retirement. House prices in North and North East Lincolnshire are below the Yorkshire average and apart from North and South Kesteven, where housing affordability is most challenging, house prices in Lincolnshire are below the East Midlands average.

But challenges remain for residents. Over 1 in 5 people earn below the living wage in Lincolnshire (rising to over a quarter in Boston, East Lindsey and West Lindsey) and North East Lincolnshire, and there are pockets of deprivation in employment and education, skills and training particularly in Eastern Lincolnshire, and North East Lincolnshire (Grimsby, Cleethorpes).

Geography	Median House Price (2023)	Affordability Ratio (2023)
North East Lincolnshire	£150,000	4.42
North Lincolnshire	£170,000	5.27
Lincolnshire	£225,000	7.08
Boston	£197,500	6.96
East Lindsey	£216,000	7.19
Lincoln	£180,000	5.44
North Kesteven	£245,000	7.88
South Holland	£240,000	7.87
South Kesteven	£255,000	8.47
West Lindsey	£220,000	7.03
East Midlands	£239,950	7.59
Yorkshire and the Humber	£195,000	6.11
England	£290,000	8.26



Source: ONS Median House Prices (2023), ONS House price to workplace-based earnings ratio (2023); Greater Lincolnshire Housing Pipeline Evidence Base (2025)

Affordable housing need

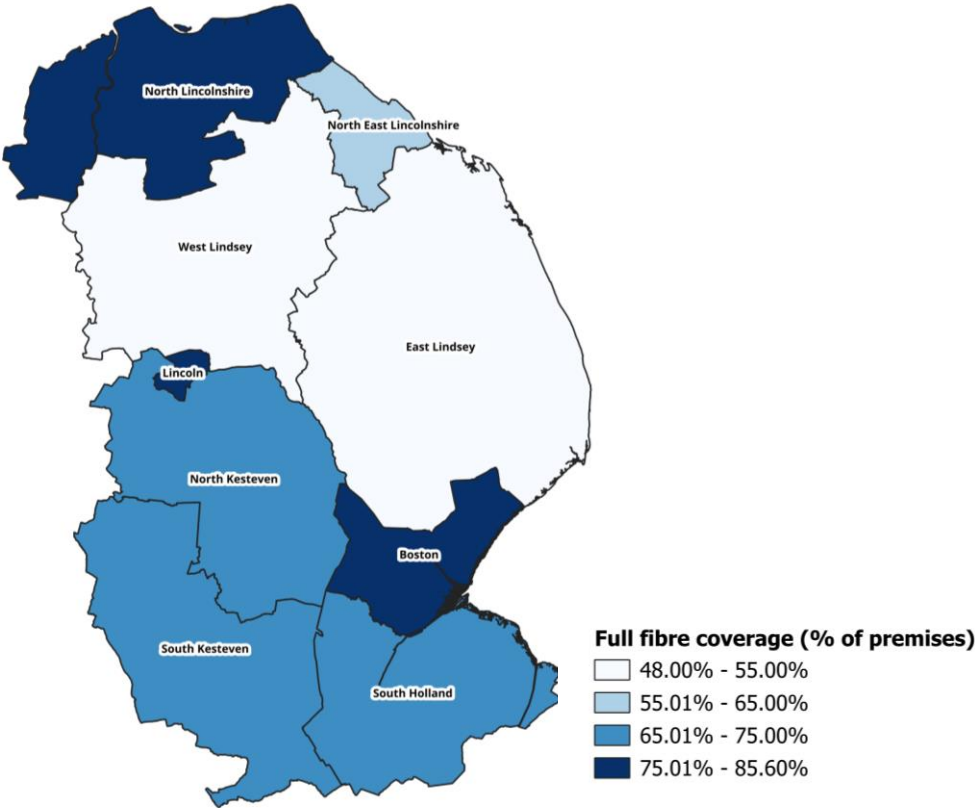
- Collectively, there is an estimated need for over 2,500 Affordable Homes each year in Greater Lincolnshire. This equates to over half of the requirement in adopted Local Plans and around half of the new Standard Method overall housing need figures.
- The scale of need for Affordable Housing identified in local authority housing evidence bases across Greater Lincolnshire is substantially higher than the number of new Affordable Homes delivered each year. Between 2001 and 2021, there were fewer than 5,000 additional Affordable Homes added to the stock in Greater Lincolnshire, averaging 250 additional Affordable Homes per year.
- Between 2001-2021, 8,848 Affordable Homes were lost to the stock in Greater Lincolnshire. It is important to note that most of these homes were not lost to the housing stock as a whole but they switched tenure and are no longer part of the available Affordable Housing stock to meet needs.

Local Authority	Date	Period	Affordable Housing Need per annum	Social/ Affordable Rent	Affordable Home Ownership
Boston	2017	2011-2036	339	263	76
East Lindsey	2021	2021-2041	493	372	121
Lincoln	2020	2018-2040	230		
North Lincolnshire	2020	2020-2038	115	79	36
North East Lincolnshire	2023	2022-2042	260	240	44
North Kesteven	2020	2018-2040	207		
South Holland	2017	2011-2036	380	282	98
South Kesteven	2023	2021-2041	402	88	314
West Lindsey	2020	2018-2040	156		
Greater Lincolnshire			2,582	1,324	689

Broadband coverage

Broadband coverage is variable but typically strong or at the UK average. It is strongest in Lincoln, North Lincolnshire and Boston, where full fibre coverage is above the UK rate. Coverage in North Kesteven, South Kesteven and South Holland is around the UK average. Coverage is patchy in East and West Lindsey, where gigabit and full fibre coverage is lower than the UK average, although full fibre take-up is fairly high of premises which have access in West Lindsey. North Kesteven is the only other Local Authority where take-up is over a third of premises which have access to full fibre services. Take-up of services is low in North East Lincolnshire and Lincoln.

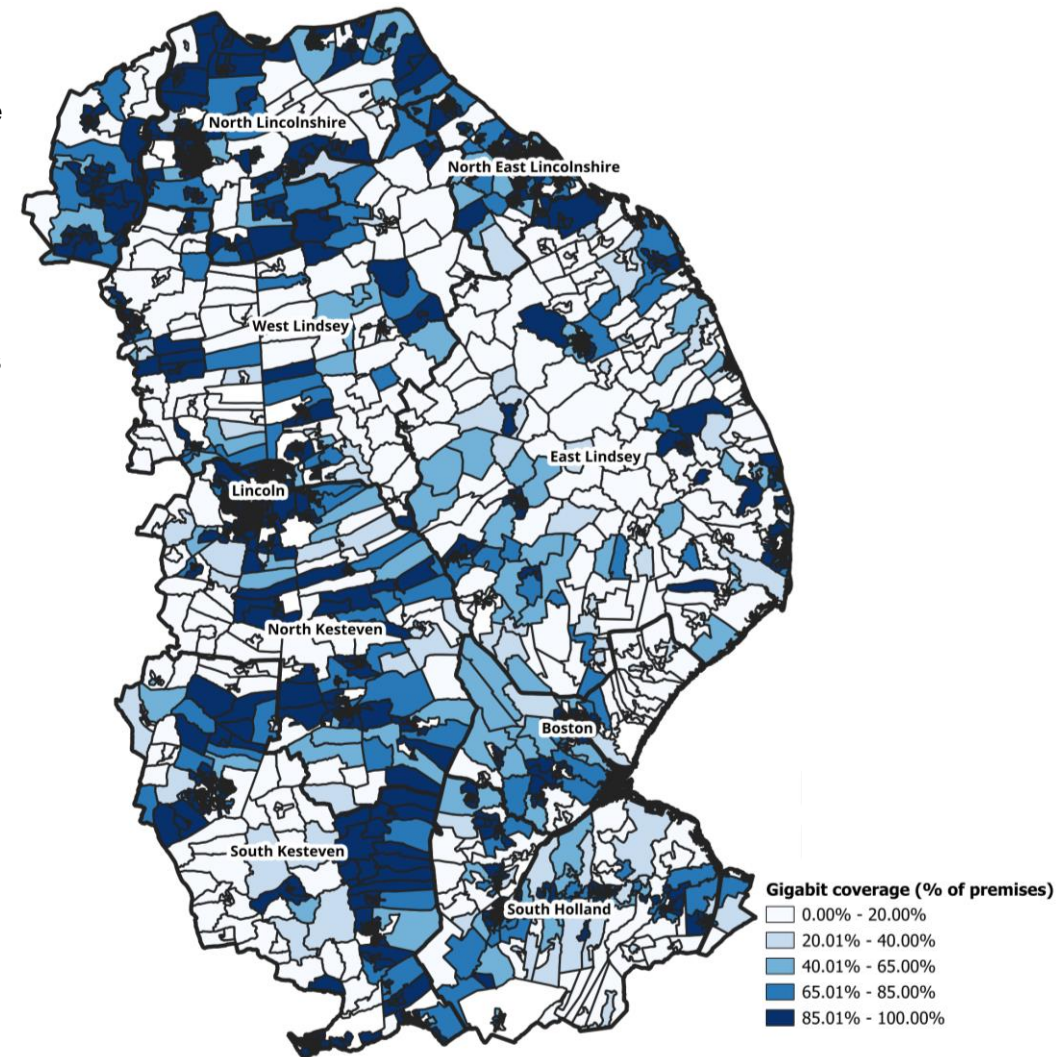
Area	Gigabit coverage (% of premises)	Full fibre coverage (% of premises)	Full fibre take-up (% of full fibre coverage)
Boston	76%	76%	26%
East Lindsey	53%	50%	28%
Lincoln	90%	81%	11%
North Kesteven	79%	66%	36%
South Holland	71%	71%	25%
South Kesteven	78%	65%	33%
West Lindsey	57%	49%	41%
North East Lincolnshire	93%	61%	11%
North Lincolnshire	88%	86%	22%
UK	83%	69%	35%



Source: Ofcom Connected Nations (2024)

Gigabit connectivity

- The map to the right shows gigabit coverage in Greater Lincolnshire by Output area to see how coverage varies at a local level.
- Local authorities where coverage is strong:
 - Gigabit coverage is strong across Lincoln.
 - Much of Boston has strong coverage including Wyberton and Kirton although more patchy in areas to the East including areas around Freiston.
 - North Lincolnshire coverage strong in Scunthorpe, Barton-upon-Humber, Epworth and Killingholme but patchy in some central areas around Burnham and Wootton.
- Local authorities where coverage is comparable to nationally:
 - South Kesteven, coverage is strong in areas around Grantham, Bourne and Thurlby but patchy across central areas of the district.
 - North Kesteven strong coverage around Sleaford, Helpringham & Osbournby, and Ashby De La Launde but patchy in eastern areas including Navenby & Brant Broughton and Bassingham.
 - South Holland coverage strong around Spalding and Long Sutton but patchy in the South of the district including areas around Crowland.
- Coverage is patchy across much of East Lindsey, but is strong in areas around Skegness and Louth. Similarly coverage is patchy across much of West Lindsey but strong in areas around Market Rasen and Gainsborough.

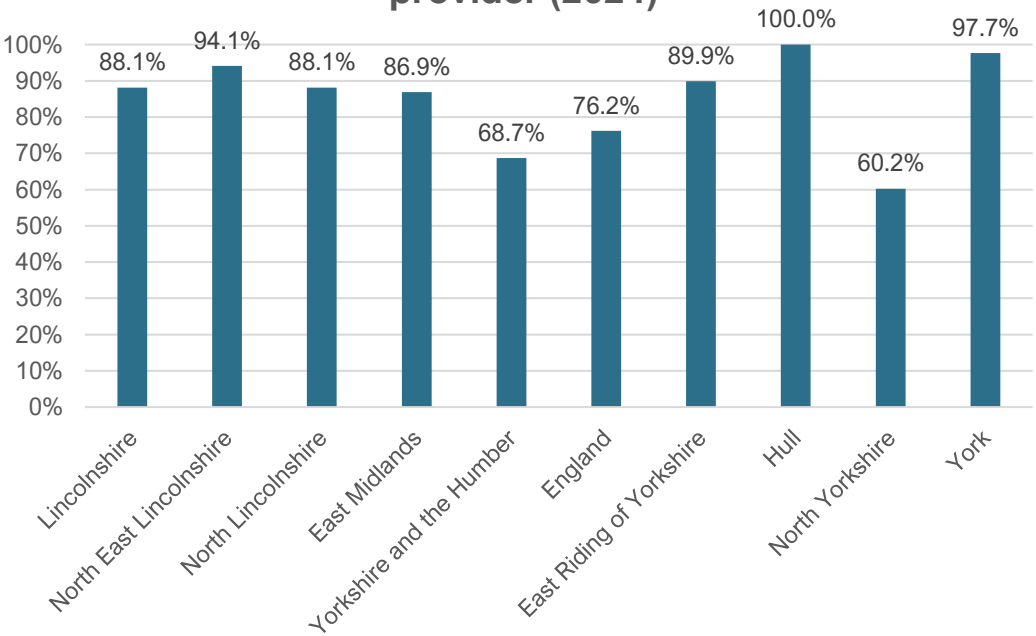


5G coverage

5G coverage is generally strong throughout Greater Lincolnshire. Coverage is again strongest in Lincoln, Boston, and North East Lincolnshire.

- 5G coverage from at least one mobile phone provider is higher in all Local Authorities in Greater Lincolnshire than compared to the English average of 76%.
- Again coverage is highest in Lincoln, where the whole area has 5G coverage from at least one provider, followed by Boston and North East Lincolnshire, where coverage is strong as it is for broadband.
- North East Lincolnshire and North Lincolnshire 5G coverage is above the Yorkshire average.
- Four of the seven local authorities in Lincolnshire have higher 5G coverage than the East Midlands average – Lincoln, Boston, West Lindsey which bucks more patchy broadband coverage, and South Kesteven.
 - East Lindsey, North Kesteven and South Holland are slightly below the East Midlands average 5G coverage, but above national coverage.

5G coverage from at least one mobile network provider (2024)

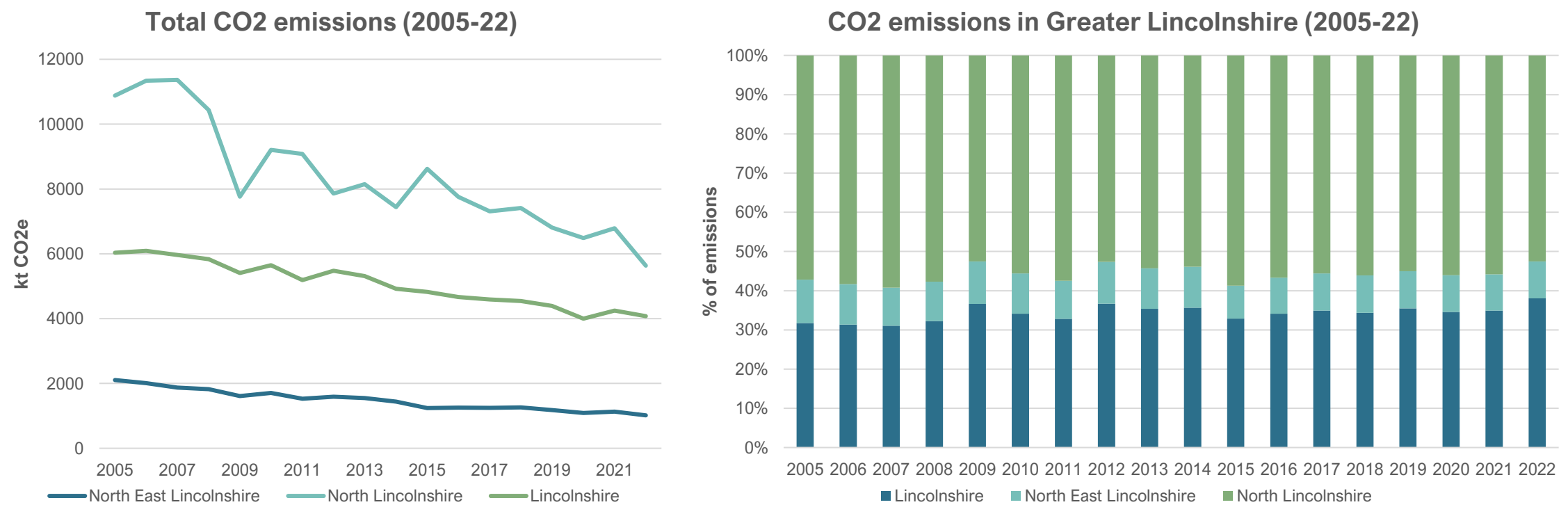


Local Authority	5G coverage
Boston	95.0%
East Lindsey	85.5%
Lincoln	100.0%
North Kesteven	85.7%
South Holland	85.2%
South Kesteven	89.1%
West Lindsey	92.4%

Source: Ofcom Connected Nations (2024); ONS (2024)
Notes: This indicator shows the percentage of geographic areas with 5G signal outdoors from at least 1 operator (signal threshold: 110dBm), in the UK, as of September 2024.

CO2 emissions Greater Lincolnshire

CO2 emissions have fallen across Greater Lincolnshire to varying degrees. Since 2005, CO2 emissions have fallen by over 50% in North East Lincolnshire, 49% in North Lincolnshire, but only by a third in Lincolnshire - across the UK emissions have fallen by 43%. North Lincolnshire accounts for the majority of CO2 emissions, with over 80% of emissions in North Lincolnshire coming from industry. However, the proportion of CO2 emissions North Lincolnshire accounts for in Greater Lincolnshire has fallen from 59% in 2007 to 53% in 2022. Lincolnshire, where there has been a relatively slow decline in emissions, accounts for an increasing proportion of overall emissions in Greater Lincolnshire – up from 31% in 2007 to 38% in 2022.

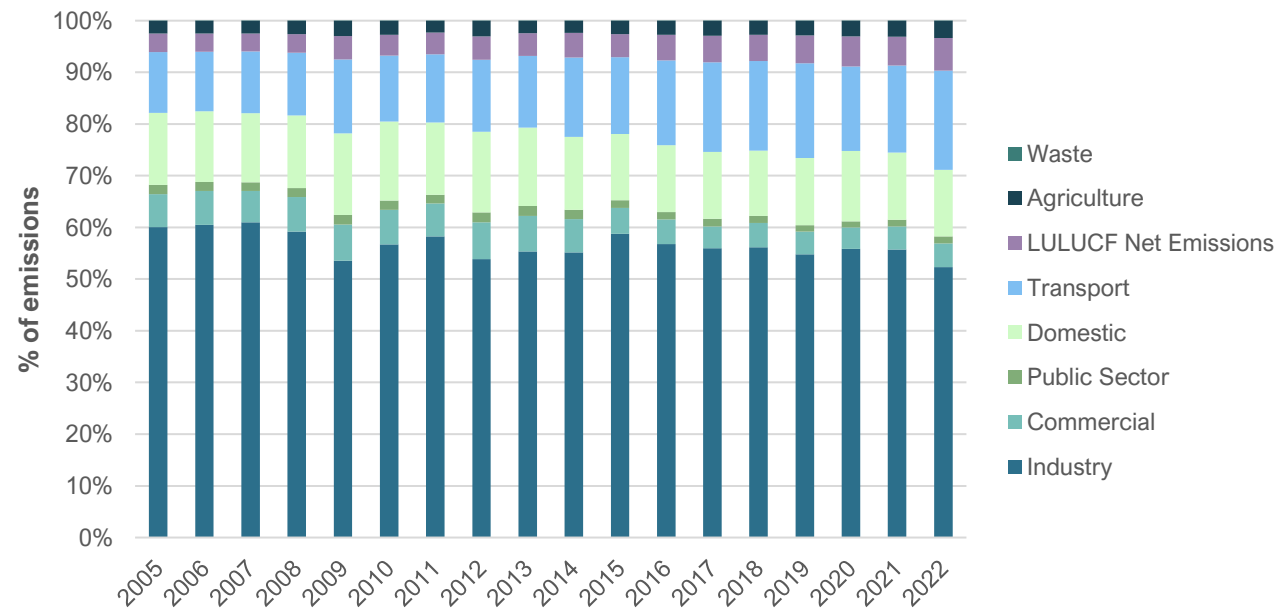


Source: Department for Energy Security & Net Zero UK local authority and regional greenhouse gas emissions statistics: 2005-2022

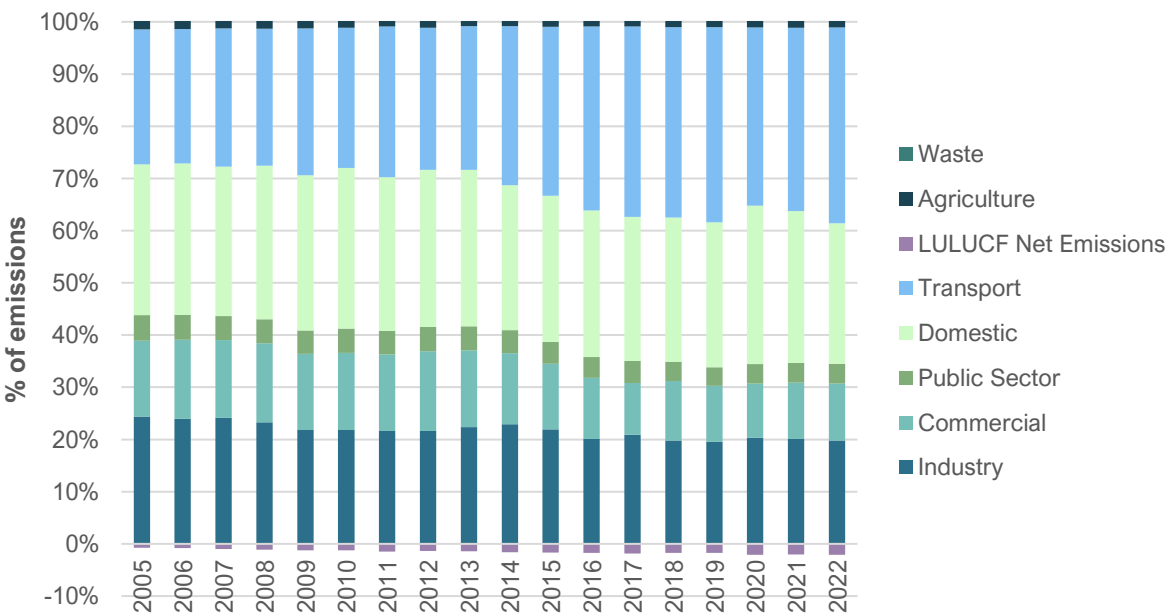
CO2 emissions by sector

Industry accounts for over half of total CO2 emissions in Greater Lincolnshire, with transport the next biggest contributor, at just over 19%. Emissions are much more concentrated compared to the UK, where transport (the biggest contributing sector, making up over a third of UK emissions), domestic (quarter of emissions) and industry (a fifth of emissions) are the main sources of emissions. LULUCF is negative in the UK, whereas the sector is a contributor to emissions in Greater Lincolnshire. The commercial sector accounts for half the proportion of emissions in Greater Lincolnshire compared to nationally.

Greater Lincolnshire CO2 emissions by sector (2005-22)



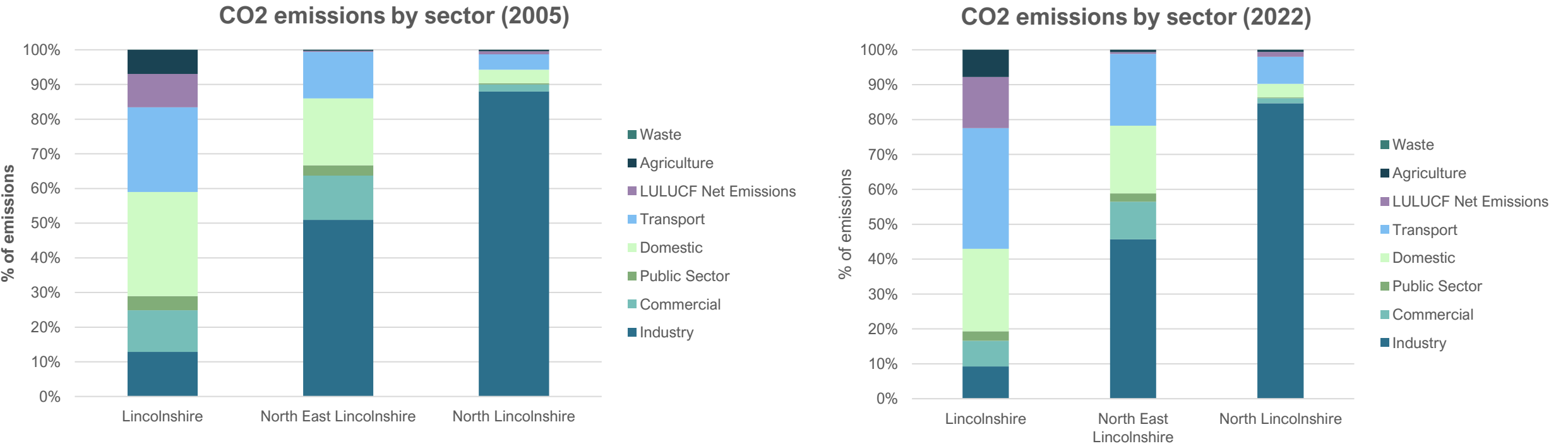
UK CO2 emissions by sector (2005-22)



Source: Department for Energy Security & Net Zero UK local authority and regional greenhouse gas emissions statistics: 2005-2022
Notes: Land-use, land-use change & forestry (LULUCF) sector differs from other sectors in that it contains both sources and sinks of greenhouse gases. The sources, or emissions to the atmosphere, are given as positive values; the sinks, or removals from the atmosphere, are given as negative values.

CO2 emissions by sector

Emissions vary substantially by source across Greater Lincolnshire. Industry is by far the biggest contributor in North Lincolnshire, and makes up just under half of emissions in North East Lincolnshire. Transport generally accounts for a lower proportion of emissions than nationally, although is a far bigger contributor in Lincolnshire compared to North and North East Lincolnshire. Commercial is a higher contributor in Lincolnshire and North East Lincolnshire. Land-use land use change & forestry (LULUCF) contributes almost 15% of emissions in Lincolnshire, and as touched upon in the last slide, LULUCF is a sink across the UK, removing emissions. Agriculture is also a relatively large source of emissions in Lincolnshire at almost 8% of total emissions.

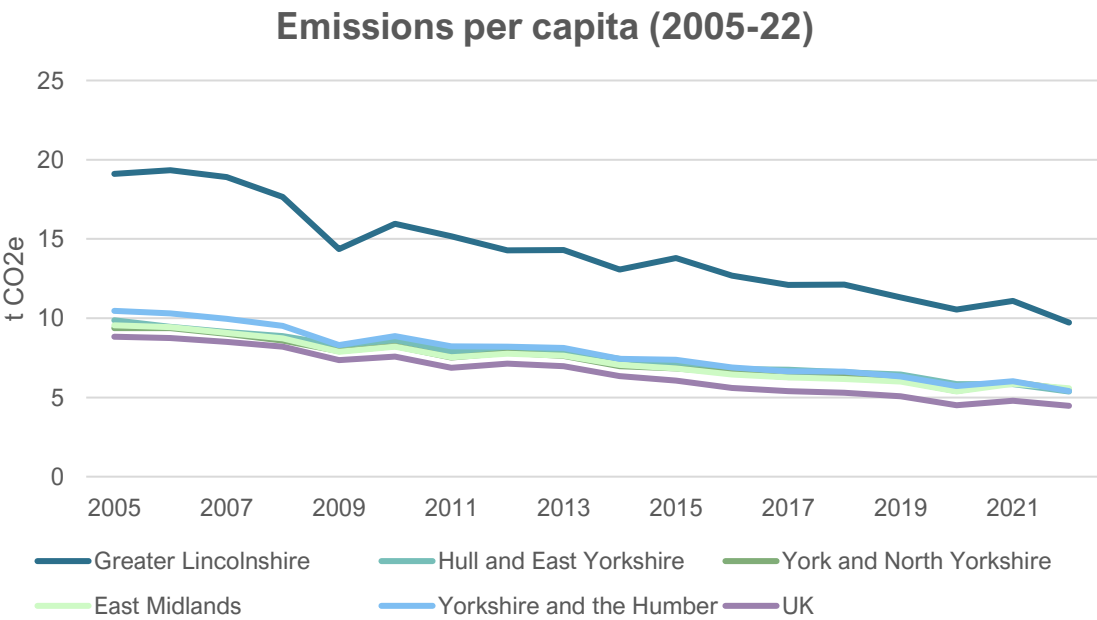


Source: Department for Energy Security & Net Zero UK local authority and regional greenhouse gas emissions statistics: 2005-2022

CO2 emissions against comparator areas

CO2 emissions have fallen in Greater Lincolnshire in line with the Yorkshire and UK averages, but emissions per capita remain well above comparator levels. This is explained in large part by high CO2 emissions in North Lincolnshire, driven by industry. Although emissions have fallen more slowly in Lincolnshire, emissions per capita are in line the East Midlands average. The more built-up nature of Lincoln, with higher public transport provision and generally less industry across the County help explain why emissions are lower in Lincolnshire. Emissions within Greater Lincolnshire have fallen fastest in North East Lincolnshire but again emissions per capita are relatively high compared to Yorkshire and UK averages, with industry a large source despite a fall in emissions from industry since 2005.

Area	Reduction in emissions (2005-22)	CO2 emissions per capita (2022) (t CO2e)
Greater Lincolnshire	43.6%	9.7
Hull and East Yorkshire	42.5%	5.4
York and North Yorkshire	37.1%	5.5
East Midlands	33.4%	5.6
Yorkshire and the Humber	44.0%	5.4
UK	43.4%	4.5
North East Lincolnshire	51.7%	6.4
North Lincolnshire	48.2%	33.1
Lincolnshire	32.4%	5.3



Source: Department for Energy Security & Net Zero UK local authority and regional greenhouse gas emissions statistics: 2005-2022

Renewable electricity

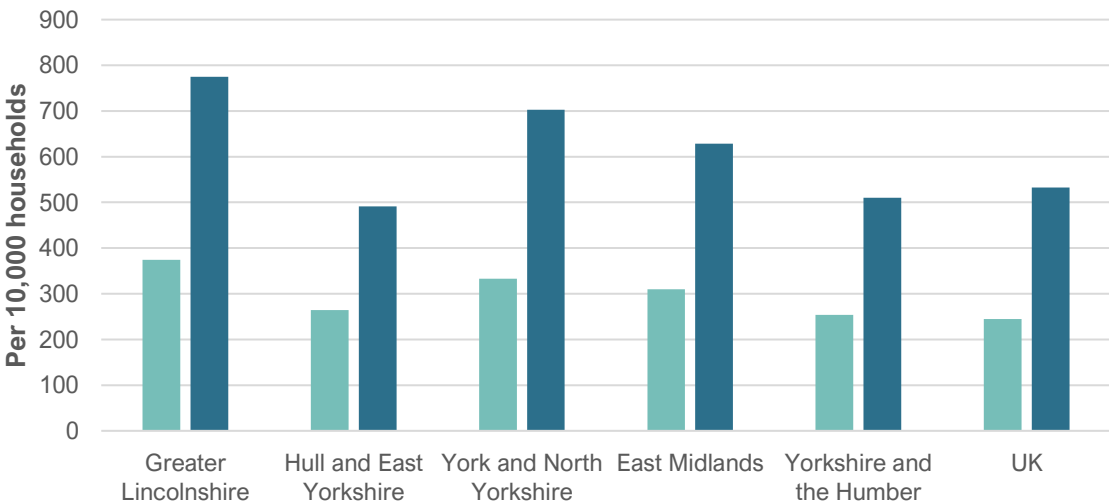
Energy strengths in Greater Lincolnshire are reinforced, with a relatively high number of renewable electricity sites and capacity

- Renewable electricity capacity has quadrupled between 2014 and 2023 to 5,324MW in Greater Lincolnshire, well above rises seen across Yorkshire (239%), East Midlands (170%) and nationally (127%).
- Capacity is also relatively high in Greater Lincolnshire, with higher MW per 10,000 households than all comparator areas.
- The number of renewable electricity sites has doubled since 2014 in Greater Lincolnshire to almost 37,000, broadly in line with increases seen across comparator areas.
- The number of renewable electricity sites remains relatively high in Greater Lincolnshire at 775 per 10,000 households.
- North East Lincolnshire accounts for over half of Greater Lincolnshire’s renewable energy capacity. Boston accounts for 18%. These two areas have by the highest capacity across Greater Lincolnshire.

Renewable electricity capacity (2014 and 2023)



Renewable electricity sites (2014 and 2023)



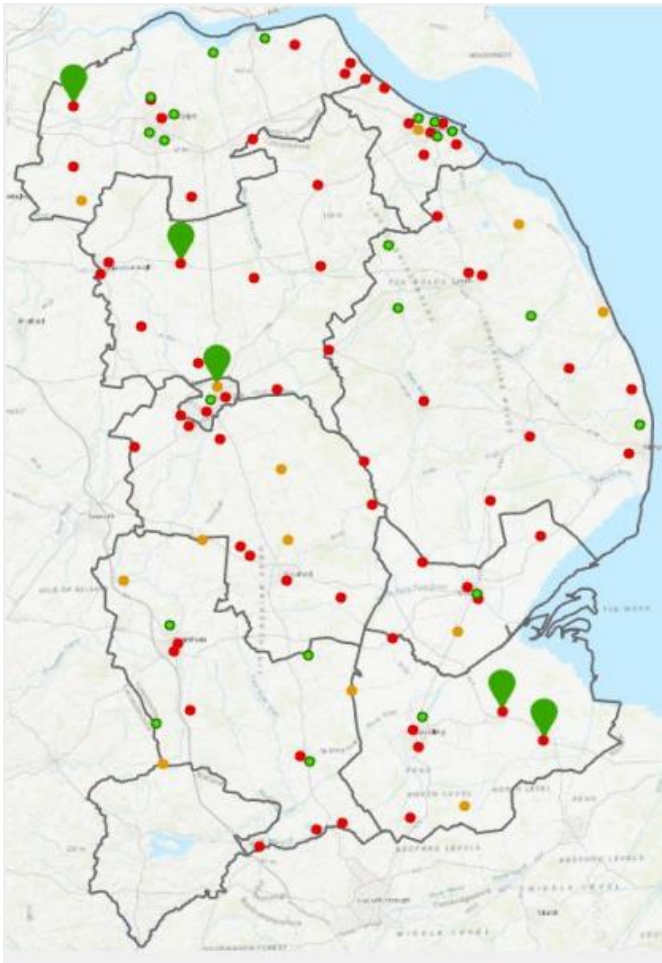
Source: Department for Energy Security & Net Zero Renewable electricity by local authority 2014-2023

Forecast demand headroom on primary electricity substations by 2032

Energy infrastructure constraints

Despite Greater Lincolnshire's clean energy strengths, energy infrastructure constraints may slow the region's transition to net zero and limit Greater Lincolnshire's ability to build on its clean energy capabilities

- Greater Lincolnshire Infrastructure Group study demonstrated that in 2023, one seventh of primary electricity substations across Greater Lincolnshire were at capacity, forecast to rise to at least two thirds of substations by 2032. This represents a significant challenge to decarbonisation, as many of the possible solutions require electrification of power that is currently provided by fossil fuels.
- If all HGVs in were to transition to electric vehicles, the network capacity to support those vehicles would require up to 1.3 times the existing demand headroom of the currently connected load. It is estimated that around half of this requirement would be concentrated in South Lincolnshire, where more than one third of the primary substations (South Holland and Boston) were at capacity in 2023. This is forecast to rise to at least three quarters of primary substations at capacity by 2032, before the requirement from heavy transport is considered.
- Lincolnshire, like many other rural counties, suffers from having less utility infrastructure than in more populated areas. This is particularly the case in terms of energy, and there are notable examples of allocated employment land whose growth is constrained by a lack of power and in some cases this has led to businesses leaving the county with knock-on effect on jobs.
- As part of National Grid's Great Grid upgrade, there are proposals for a new high-voltage electricity transmission line and associated works between a new substation at Grimsby West to Walpole in Norfolk, along with two new connection substations in Lincolnshire.



	Primary substation with demand headroom > 2.5 MVA
	Primary substation with 0 MVA < demand headroom ≤ 2.5 MVA
	Primary substation with demand headroom ≤ 0 MVA



Planned Investments (RIIO-ED2)

Source: Greater Lincolnshire LEP Energy Decarbonisation Opportunities for the UK Food Valley 2023; Lincolnshire County Council 2023; National Grid

Water scarcity

- Greater Lincolnshire is one of the driest regions of the country. Climate models predict that we will see more frequent and longer periods of drought or flooding. In the case of drought, the increased frequency of multi-year periods of below average rainfall.
 - The City of Lincoln is drier than Miami, Buenos Aires and Nairobi and shares the same rainfall as Cape Town.
- Greater Lincolnshire is subject to flood risk from the sea, main rivers, surface water and groundwater. The extent and nature of this risk varies across the area.
 - The risk of coastal and river flooding affects up to 45% of the land area of Greater Lincolnshire, whilst surface water flooding, although of more localised and limited impact, occurs more frequently and is more difficult to predict.
- This is a major challenge in the context of planned growth and will require careful conservation and management of water resources, as well as mitigation against the increasing risk of flooding.
- Plans for a new reservoir in Lincolnshire are aimed at reducing pressure on the system across the Eastern regions where rainfall is typically lower than other regions in the country. The plans have been endorsed by the Secretary of State and a second phase of public consultation has concluded. Gate 3 submissions are due in September 2025.

Source: GLLEP Water Management Plan; Water Resources East (2024)

Proposed masterplan for the Lincolnshire reservoir



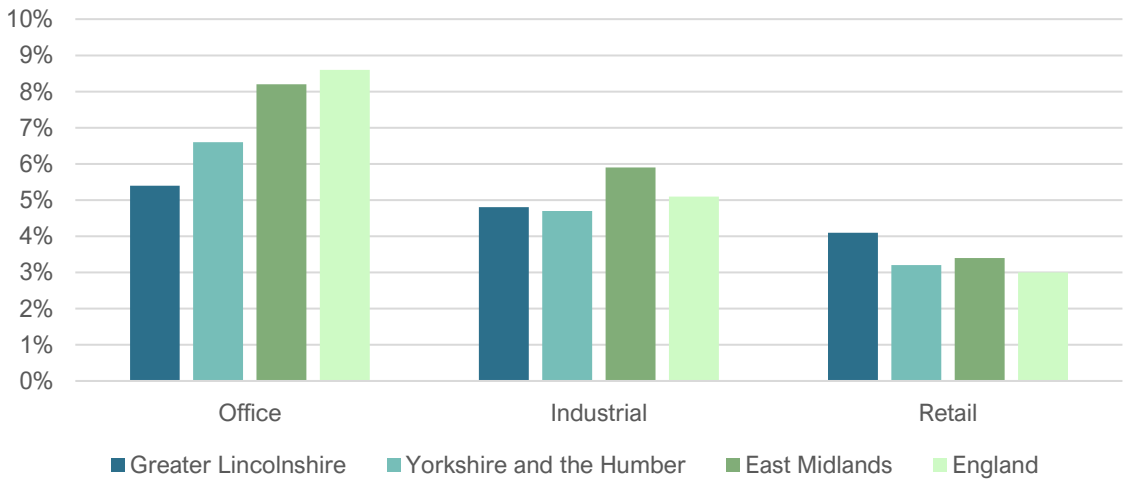
Transport constraints

- Average delays on Greater Lincolnshire's A roads are generally lower – 18.9 seconds per vehicle per minute in Lincolnshire and 20.8 in North Lincolnshire compared to 39.6 and 46.1 for the for subnational transport bodies (STB) of Midlands Connect and Transport for the North (TfN), and 48.3 across England. Again, this is due to the primarily rural nature of these roads across the County. Although in North East Lincolnshire, the delay is towards the TfN and English average at 47.5 seconds per vehicle per minute.
 - Traffic conditions vary considerably from highly congested stretches in the larger urban areas such as the A15 through Lincoln (A1434 average delay of 76 seconds per vehicle per minute), the A16/180 through Grimsby (A1243 average delay of 70 seconds per vehicle per minute) the A52/A607 through Grantham and the A16/A52 through Boston (A1137 average delay in 2024 of 123 seconds per vehicle per minute), to quieter, more free-flowing sections on rural parts of the network.
- CO2 emissions from transport have fallen by 8% in Greater Lincolnshire since 2005. However this is below the 18% decline nationally.
 - Also CO2 emissions per capita from transport are higher in Greater Lincolnshire, at 1.86 tonnes compared to 1.68 nationally.
 - Lincolnshire's road network is dominated by single-carriageway A-roads, and this is where the half of transport emissions are generated.
 - Heavy transportation makes much use of Lincolnshire's transport networks, which results in increased pollution and localised congestion.
- The rural nature of much of the region necessitates transport by car in many instances, again helping explain higher transport emissions. It also means that public transport can be more limited.
 - The number of passenger journeys by bus in Lincolnshire grew by almost 31% between 2005/06 and 2008/09. The growth in England over the same period was just 8%.
 - However, since 2010/11 there was a 28.9% reduction in bus passenger journeys in Lincolnshire up to 2022/23.

Commercial vacancy rates

- The value of commercial property remains relatively low in Greater Lincolnshire, a reflection of relatively low property values.
- Office space: vacancies have consistently been relatively low in Greater Lincolnshire, although increasing since 2021 post pandemic, in line with national trends, likely explained by falling demand with rising levels of hybrid working. Supply does not appear constrained, with more space becoming vacant rather than being leased over recent years.
- Industrial space: demand for industrial space was very high up to the start of 2020, with strong net absorption indicating more space being leased than vacated and possible constrained supply. Demand fell during the Pandemic, before rising in 2022 and then cooling in 2023, generally following national trends. Market rent has risen most strongly for industrial space within Greater Lincolnshire but still below regional and national averages.
- Retail space: demand for space was relatively high in the second half of 2019 before falling during the Pandemic. Demand has fallen more strongly for retail space since 2022, with more space being vacated than being leased. Rental values have seen lowest growth in rental values following regional and national trends.

Commercial vacancy rates (2025 Q1)



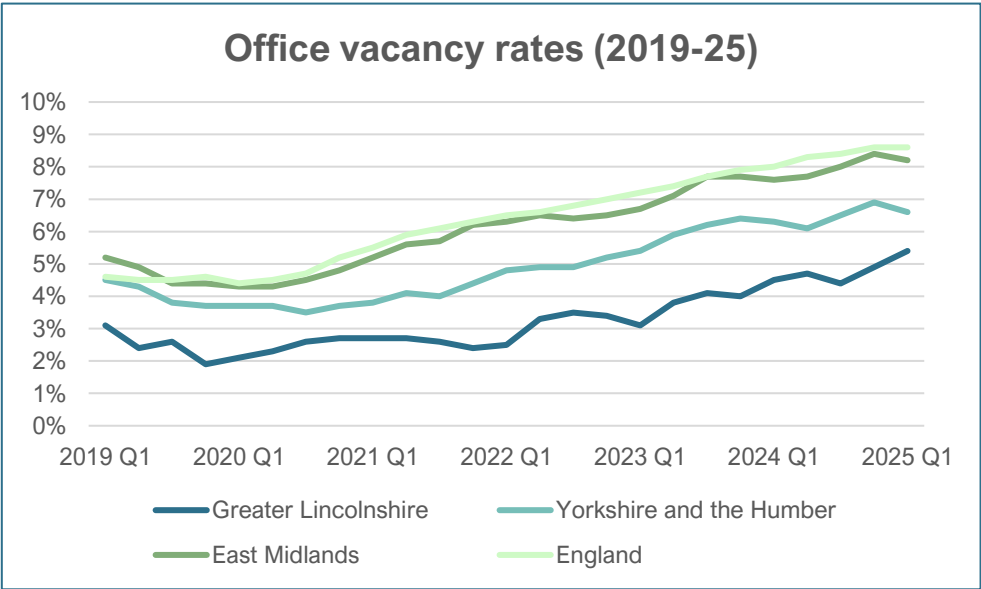
Market asking rent/ Sq ft

Area	Office (2019)	Office (2024)	Industrial (2019)	Industrial (2024)	Retail (2019)	Retail (2024)
Greater Lincolnshire	£9.65	£10.46	£4.38	£5.76	£15.72	£16.07
East Midlands	£12.15	£13.44	£5.65	£7.50	£19.38	£19.84
Yorkshire and the Humber	£13.43	£15.39	£5.04	£6.91	£20.42	£20.69
England	£28.28	£31.41	£6.67	£9.20	£25.63	£26.59

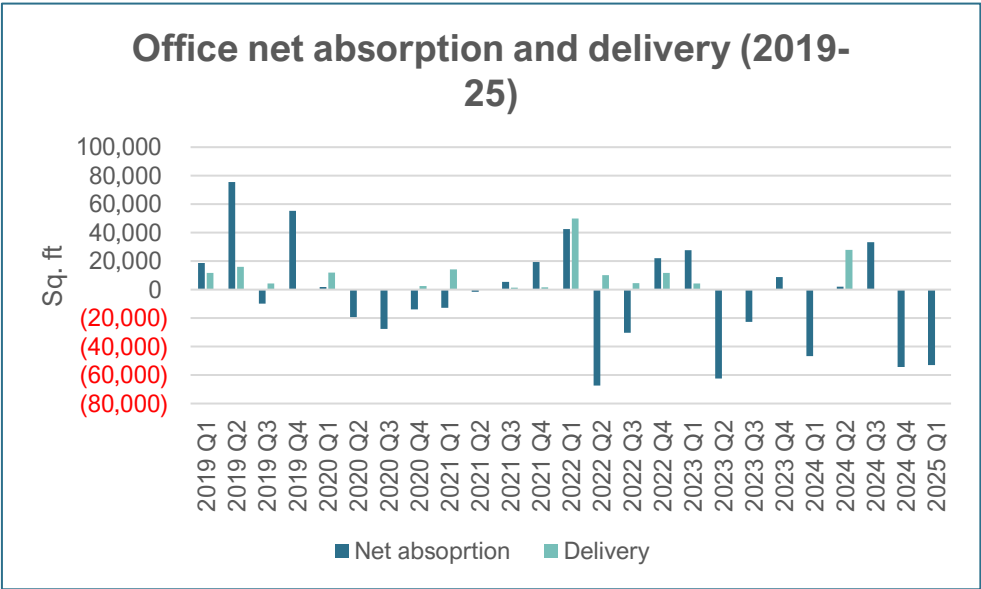
Source: CoStar (2025)

Office space

- Vacancy rates are relatively low for office space. This has consistently been the case since 2019, although vacancies have increased since 2021, likely with more people hybrid working post Pandemic.
- More space has become vacant than being leased over this period, following similar trends to regionally and nationally, implying a cooling of the market. Again this is likely because less office space is needed with more hybrid working. Given this, supply does not appear to be constrained.
- Vacancy rates for office space are higher than industrial and retail space, suggesting demand is lower for office space in Greater Lincolnshire.
- Market asking rent per sq. ft has increased by an average of 1.6% per year to £10.46 between 2019 and 2024. This is below growth seen regionally and nationally of between 2-3%.

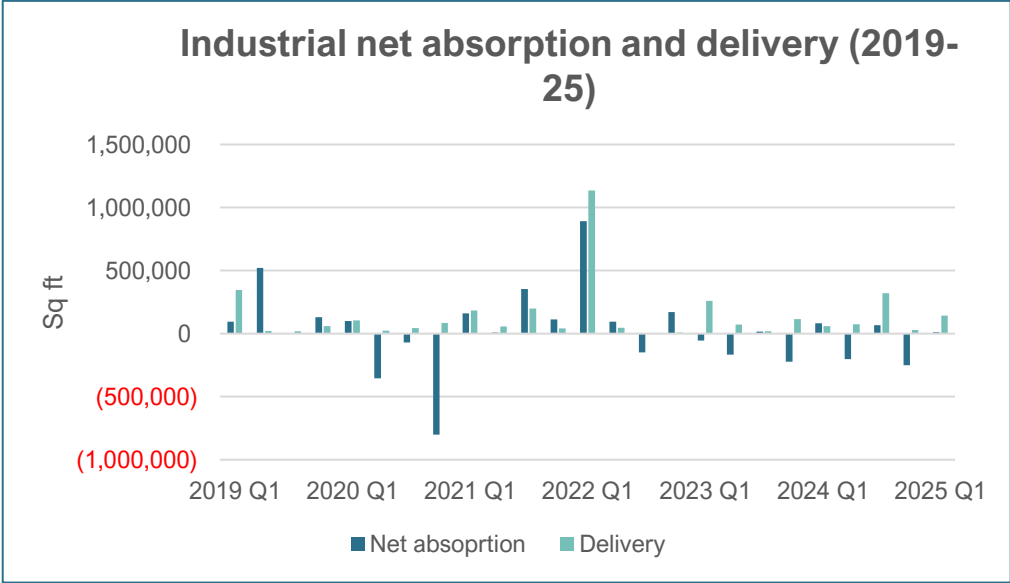
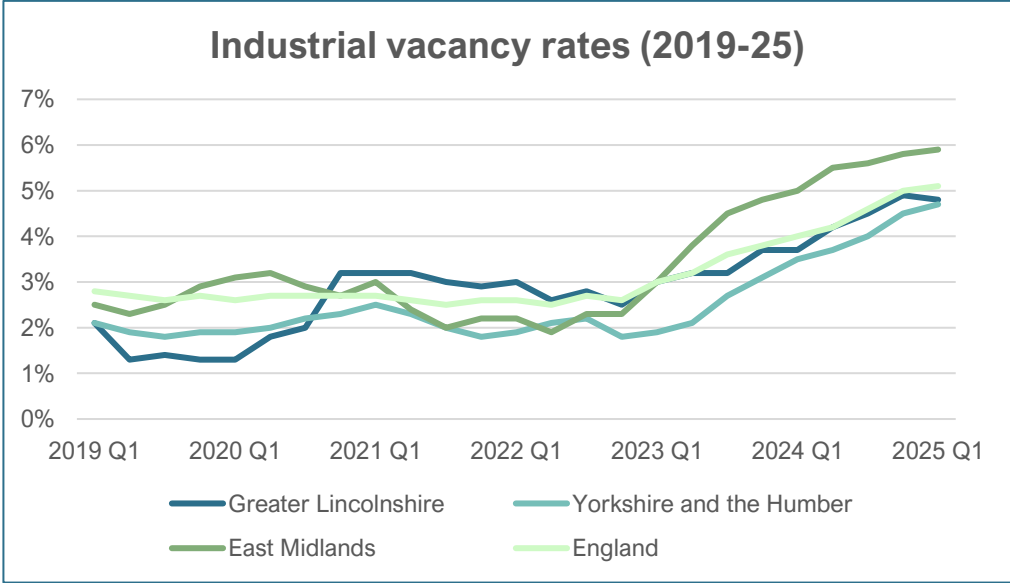


Source: CoStar (2025)



Industrial space

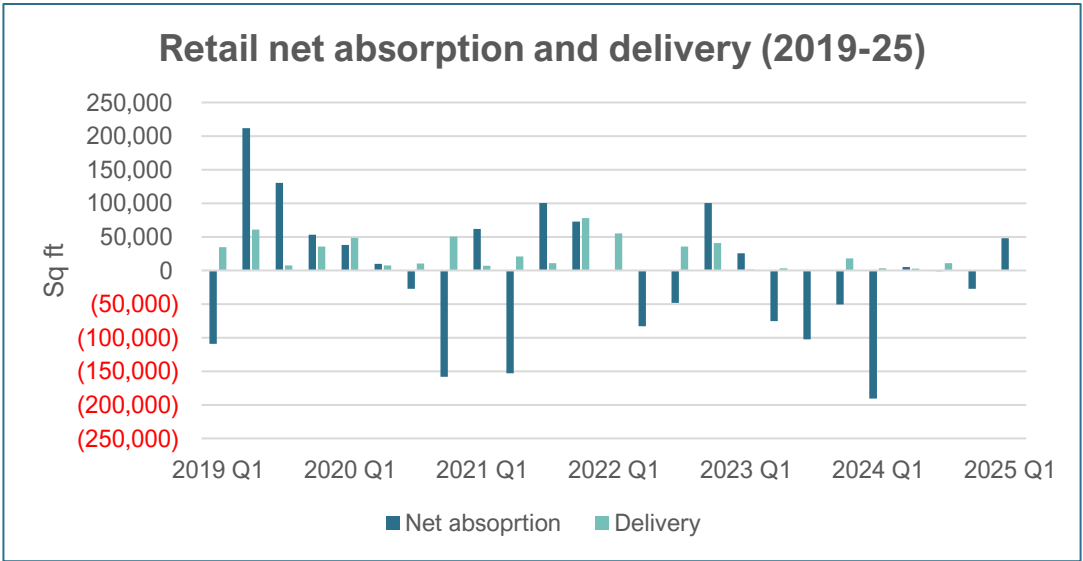
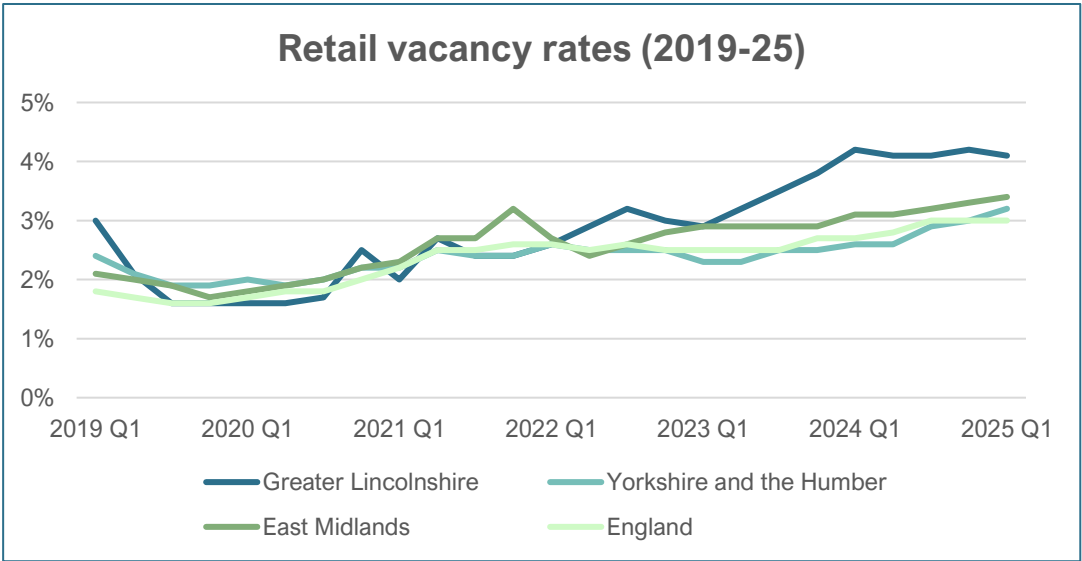
- Demand for industrial space was very high up to the start of 2020, with vacancies around 1%. Vacancies rose from the start of 2020 likely a reflection of a decline in demand for production space. Since 2021, vacancies have generally followed national trends, rising from the start of 2023 to around 5% in 2025. There does not appear to be constrained supply as was the case in 2019 in Greater Lincolnshire.
- Positive net absorptions in 2019 appears to confirm strong demand for industrial space, before more space becoming vacant than being leased in 2020. The market appeared to increase in demand early 2022, where much of the additional delivery had been leased, before cooling again from 2023 where net absorptions have generally been negative.
- Market asking rent per sq. ft has risen sharply by an average of 5.6% between 2019 and 2024 to £5.76, the highest rise in rent values within Greater Lincolnshire however this is slightly below 6.5% growth seen across Yorkshire and nationally - of all types of space, industrial rents are closest to the Yorkshire average.



Source: CoStar (2025)

Retail space

- Vacancies in 2019 fell, with a rise in demand for space with net absorptions rising strongly in the second half of 2019, before rising in late 2020, again broadly following national trends where demand for space declined during the Pandemic.
- Since 2022, vacancies have increased more strongly in Greater Lincolnshire than compared to comparator areas, indicating weaker demand for space. Although some space has been delivered in this period, retail space has tended to become vacant rather than being leased.
- Market asking rent per sq. ft for rental space has increased by an average of 0.4% between 2019 and 2024 to £16.07, the lowest rise across types of space, following regional and national trends.

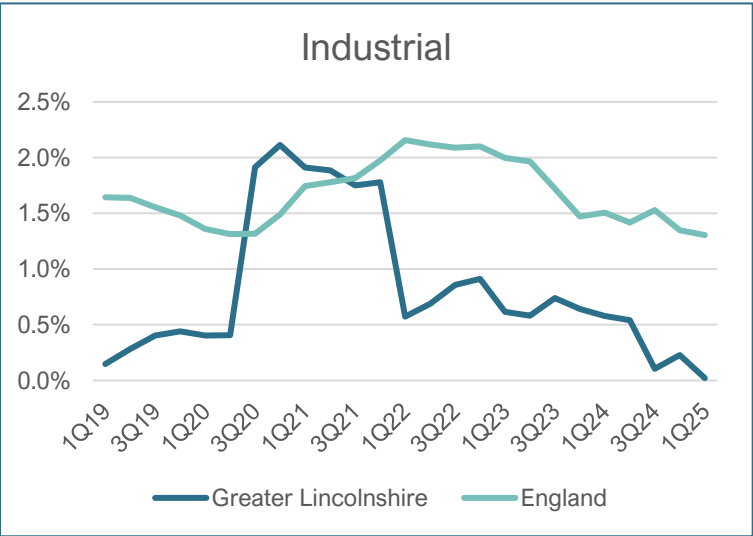
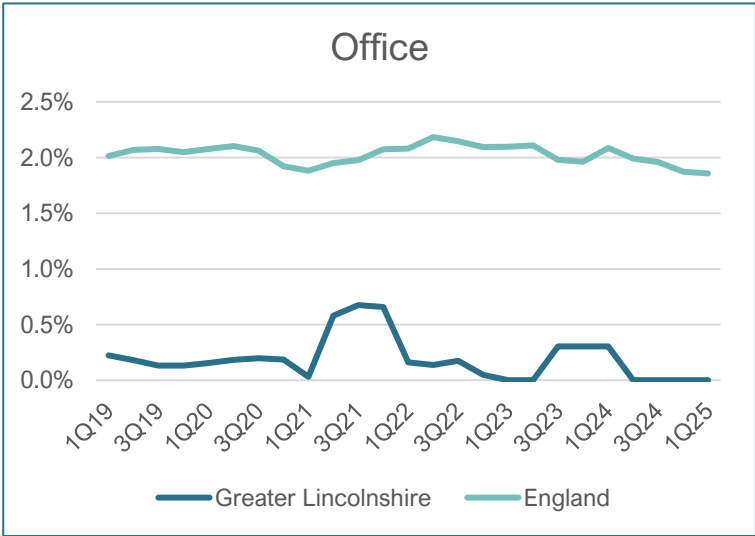


New developments

	Properties delivered	Total square feet
Office	21	171,905
Industrial	158	3,425,554
Retail	60	549,648

The table summarises the total number of buildings and square foot that has been completed in Greater Lincolnshire since Q1 2019. It highlights that industrial space accounts for the majority of all space delivered in the last five years. Some notable Grade A properties in that period include the Alchemy Building in Lincoln Science & Innovation Park, and new warehouses in St Mowden Park.

The three graphs below show the proportion of total existing inventory under construction across the past five years in Greater Lincolnshire and England. The charts highlight that office and industrial commercial property, construction of new properties has been at a slower rate than England. The only exception being in 2021, where construction of new industrial space were a higher proportion of total inventory than England, before falling again in 2022 and continuing to drop off since. New retail space as a proportion of total inventory is in line with the national average.



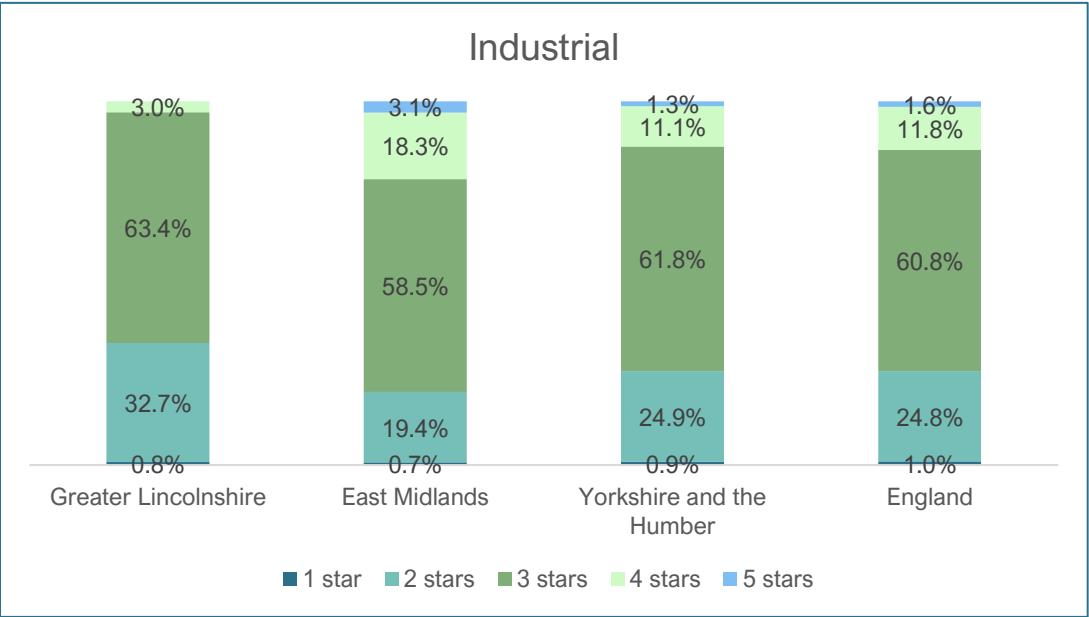
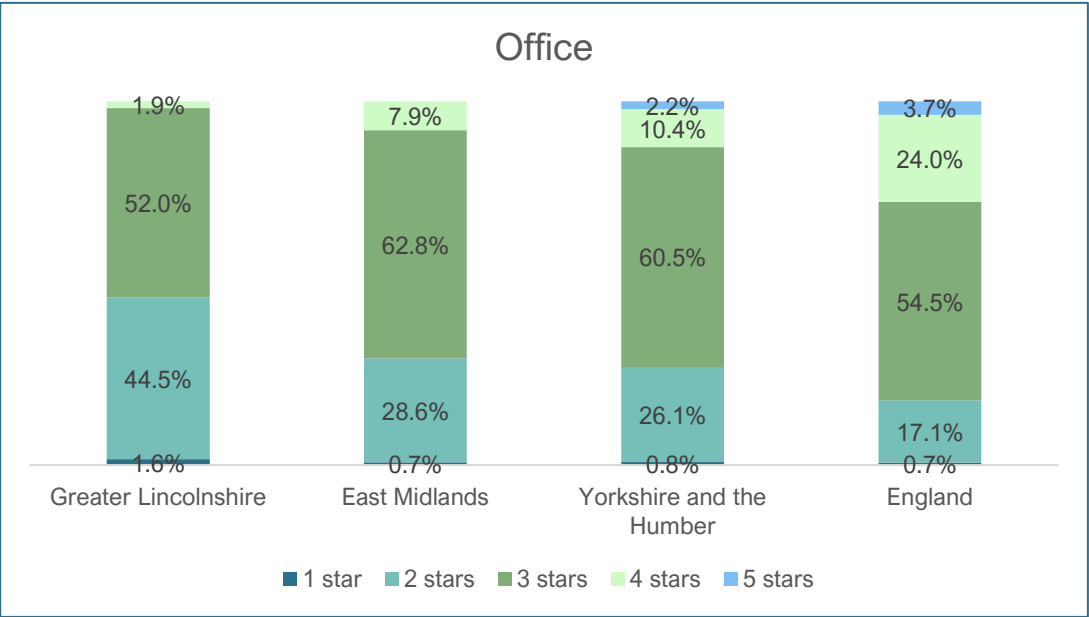
Source: CoStar (2025)

Quality of space

These charts show the total inventory of office and industrial space in Greater Lincolnshire and comparators broken down by quality using CoStar ratings. All properties are scored from 1 to 5 stars, with 1 being the lowest quality and 5 being the highest quality properties. Properties with a rating of 4 or 5 stars are equivalent to Grade A.

These charts show that the quality of both office and industrial space is generally lower in Greater Lincolnshire than regionally and nationally. For offices, just 1.9% of total space is considered Grade A, significantly lower than the England average of 27.7%, as well as East Midlands and Yorkshire averages of 7.9% and 12.6% respectively. There is a slightly higher share of industrial space that is Grade A in Greater Lincolnshire at 3%. However, this still falls below comparators.

There is a quality offer at Lincoln Science & Innovation Park including 12,000m² of premium office, laboratory and technical workshop space at Boole Technology Centre, Alchemy Building and Joseph Banks Laboratories. Phase two plans to double high quality commercial space.



Source: CoStar (2025)

Offices – towns & city analysis

The table below shows metrics on office space in the key towns of Boston, Grimsby and Scunthorpe, and city of Lincoln.

Lincoln has the highest amount of office space at 2.5 million sq ft followed by Grimsby at 1.5 million whilst Boston and Scunthorpe have 500,000 and 600,000 respectively. The average vacancy rate in 2024 for Greater Lincolnshire was 4.8%, much lower than the England average. In particular, Boston has a very low vacancy rate of below 1% and is the only area to see vacancy decrease post-covid. Office rents are significantly below the England average across Greater Lincolnshire averaging £10.46. These are particularly low in Scunthorpe at £8.54, which also saw the lowest increase in five years and a relatively high number of months on market, suggesting that demand for office space is lower than elsewhere. Offices in Boston and Grimsby also have longer times on the market before take-up than the England average. The share of office space that is grade A also falls significantly below the England average at 5% or less.

Indicators	Boston	Grimsby	Lincoln	Scunthorpe	Greater Lincolnshire	England
Total floorspace (square feet)	467,696	1,492,695	2,466,647	635,409	9,207,780	1,249,050,380
Vacancy Rate (2024)	0.9%	4.9%	7.6%	4.9%	4.8%	8.6%
5-year change in vacancy (percentage points) (2019-24)	-0.5%	1.6%	5.1%	4.6%	2.9%	4.1%
Market asking rent per sq ft (2024)	£11.00	£9.52	£10.40	£8.54	£10.46	£31.41
5-year % change in rents (2019-24)	1.2%	1.9%	0.9%	0.7%	1.6%	2.1%
Months on Market	25.3	17	9.5	19.2	11.6	11.7
% Grade A	0%	2.0%	5.0%	2.7%	1.9%	27.6%

Source: CoStar (2025)

Industrial properties – towns & city analysis

The table below shows metrics on industrial space in the key towns of Boston, Grimsby and Scunthorpe, and city of Lincoln.

For industrial space, Scunthorpe comes out on top in terms of total inventory at 9.9 million sq ft, followed by 7.6 million sq ft in Grimsby and Grimsby at 7.3 million sq ft in Lincoln. On average, vacancy in Greater Lincolnshire is similar to the England average. However, in each of the selected areas, vacancy is lower such as Scunthorpe at 1.5%. Similar to offices, rents are significantly lower than the England average, but not by as much, with Lincoln and Grimsby having significantly higher rents than Boston and Scunthorpe. Rent increases are also below the England average, although of all types of space, industrial has seen the fastest rise in value in Greater Lincolnshire at 5.6% per year since 2019.. Except for Scunthorpe, take-up of industrial space is generally quicker in Greater Lincolnshire, with Grimsby having a particularly low average months on the market at just five. Greater Lincolnshire as a whole have a higher share of Grade A industrial space than offices, however, these seem to be outside of the selected key areas.

Indicators	Boston	Grimsby	Lincoln	Scunthorpe	Greater Lincolnshire	England
Total floorspace (square feet)	4,260,366	7,614,635	7,303,933	9,860,514	72,362,188	3,370,282,859
Vacancy Rate (2024)	4.8%	2.1%	3.7%	1.5%	4.9%	5.0%
5-year change in vacancy (percentage points) (2019-24)	-0.1%	1.7%	2.9%	0.8%	3.6%	2.3%
Market asking rent per sq ft (2024)	£4.80	£5.83	£6.49	£4.95	£5.76	£9.20
5-year % change in rents (2019-24)	5.1%	5.3%	5.3%	5.6%	5.6%	6.6%
Months on Market	5.8	5	6.5	8.7	6.8	7.1
% Grade A	0%	0%	2.7%	1.8%	3.0%	13.3%

Source: CoStar (2025)

Retail properties – towns & city analysis

The table below shows metrics on retail space in the key towns of Boston, Grimsby and Scunthorpe, and city of Lincoln.

Similar to offices, Lincoln has the most retail space of all selected key areas in Greater Lincolnshire followed by Grimsby. Across Greater Lincolnshire, vacancy is higher than the England average unlike other types of commercial space. A standout for this is Boston, where the vacancy rate has increased by ten percentage points to 15.2% since 2019. Lincoln is the only area with a lower vacancy rate than the national average, whilst it also has the highest rent at £18.76 per sq ft followed by Boston, whilst Grimsby and Scunthorpe both fall below £16. Rents have also seen the slowest rise in value for retail space, following national trends although growth in rents has been below the 0.7% rise annually nationally. Except for Lincoln, each area has a higher average number of months on market for retail properties than nationally, with Scunthorpe having the highest at 11.5. Both Grimsby and Boston have a very small share of floorspace that is Grade A, but all selected areas have a lower share than the national average.

Indicators	Boston	Grimsby	Lincoln	Scunthorpe	Greater Lincolnshire	England
Total floorspace (square feet)	2,169,168	4,205,588	5,731,144	2,885,686	26,834,989	1,437,058,776
Vacancy Rate (2024)	15.2%	5.2%	2.0%	3.9%	4.2%	3.0%
5-year change in vacancy (percentage points) (2019-24)	10.2pp	3.6pp	0.5pp	3.1pp	2.6pp	1.4pp
Market asking rent per sq ft (2024)	£18.21	£15.76	£18.76	£15.80	£16.07	£26.59
5-year % change in rents (2019-24)	0.5%	0.3%	0.6%	0.4%	0.4%	0.7%
Months on Market	10.5	9.6	6.7	11.5	8.5	8.0
% Grade A	0%	0.5%	5.8%	6.3%	2.3%	10.5%

Source: CoStar (2025)

Investment & innovation

Investment headlines – investment and funding

- Despite growth in research and development (R&D) expenditure in Greater Lincolnshire, expenditure remains relatively low per capita, particularly in Lincolnshire.
 - Using latest available data at the ITL2 level, total R&D grew by 6% annually in Lincolnshire to £68.1m and by 4% in East Yorkshire and Northern Lincolnshire to £187.5m between 2015 and 2019.
 - However, Lincolnshire ranks fourth lowest of ITL2 areas at £89 per capita. East Yorkshire and Northern Lincolnshire at £200 per capita is closer but remains well below the Yorkshire average of £321 per capita and £578 across the UK.
- Business R&D expenditure in Lincolnshire had risen to £134m in 2022. Although per capita expenditure remained well below regional and national averages at £173, the gap had closed somewhat but has since widened again in 2023.
 - Expenditure fell to £83m, down by 38% between 2022 and 2023, the third largest drop across ITL2 areas.
 - Business R&D expenditure rose 3% across the UK and 2% across Yorkshire between 2022 and 2023.
 - Per capita business R&D in Lincolnshire has fallen to £106 in 2023, over three quarters below East Midlands and UK per capita levels.
- Business R&D expenditure totals £191m in 2023 in East Yorkshire and Northern Lincolnshire. At £201 per capita, this is the ninth lowest of ITL2 areas, 40% below the Yorkshire average and almost three quarters below the UK average.
 - Expenditure is down by 27% from £262m in 2022, the fifth largest drop across ITL2 areas.
- Investment in gross fixed capital formation (GFCF) is relatively high but given low levels of investment in R&D, it is likely that on the whole, investment in Greater Lincolnshire is relatively low.
- Despite significant growth in UKRI funding since 2019/20 in Greater Lincolnshire, this is from a relatively low base and the area receives a relatively small amount of UKRI funding compared to regional and national averages.
 - In 2023/24, Lincolnshire received £30m of UKRI funding, up by 21% annually from 2019/20. Funding per capita has risen from £18 to £38 over this period.
 - UKRI funding has also risen strongly in East Yorkshire and Northern Lincolnshire by 27% annually to £37m between 2019/20 and 2023/24.
 - However, Lincolnshire receives just a one third of East Midlands per capita levels; East Yorkshire and Northern Lincolnshire receives just over a third of the Yorkshire, and both around a quarter of UK levels of £134 per capita.
- Greater Lincolnshire secured £6.35m Innovate UK funding in 2023/24, concentrated in and around Lincoln, including Plexsys Interface Products, Agaricus Robotics, the University of Lincoln, and B-Hive Innovations. This equates 102 to £5.71 per capita, well below almost £38 across the UK.

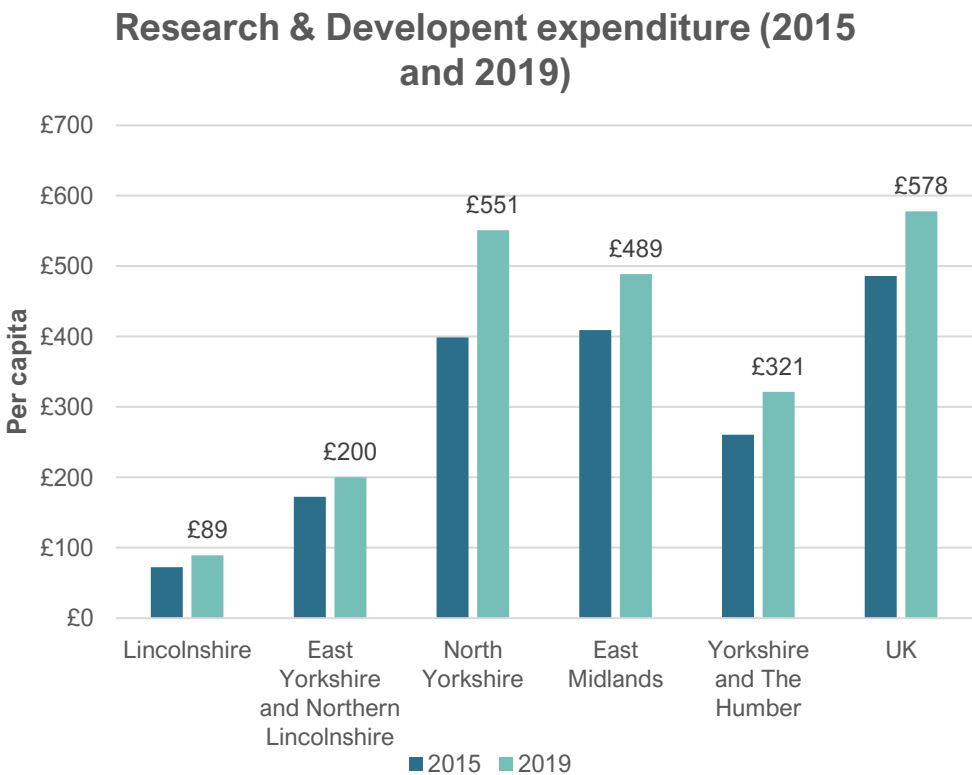
Innovation headlines – business & HE

- Overall, 35% of businesses in Greater Lincolnshire are classed as innovation active in 2020-22.
 - Despite a slight fall over recent years, Greater Lincolnshire has displayed a strong level of resilience, where the proportion of innovation active businesses is now in line with the Yorkshire and East Midlands averages having been lower in 2018-20.
 - But, Greater Lincolnshire ranks tenth lowest of LEP areas, and the proportion of innovation active businesses remains 1.6pp below the UK average.
- Along with a decline in the proportion of innovation active businesses, there has been a decline in the proportion of businesses performing internal R&D, with Greater Lincolnshire seeing one of the sharpest declines of comparator areas from 18.5% to 12.3% - at least 1.5pp below regional and UK levels in 2020-22.
 - Greater Lincolnshire ranks tenth lowest of LEP areas by the proportion of businesses performing internal R&D.
- Between 2018-20 and 2020-22, the proportion of businesses developing new or improved products or services rose from 12.7% to 17.5% in Greater Lincolnshire, countering declines seen in other innovation related business activity, and decline in product innovation activity amongst comparator areas.
 - 17.5% of businesses engaged in product innovation is in line with the East Midlands average but below 19.6% in Yorkshire and 19.4% across the UK.
- More businesses are reaching the scaleup stage in Greater Lincolnshire since 2018 but there remains relatively few scaleups in Greater Lincolnshire.
 - Latest data for 2022 estimates there are 44.1 scaleups per 100,000 population compared to over 50 regionally and nationally.
- The University of Lincoln is still a relatively young university and this is reflected in its commercialisation activity. The University of Lincoln has a relatively low number of university spinouts, a low amount of Intellectual Property (IP) income generated, and a relatively small patent portfolio compared to regionally in the East Midlands and nationally.
 - In 2022/23, there were two active spinouts at the University of Lincoln, showing signs of progress in commercialisation activity at the university. There are no spinouts at Bishop Grosseteste Lincoln.
 - Commercialisation activity at the University of Lincoln is not helped by a relative lack of funding received. Per spinout, the University of Lincoln received around half the East Midlands average and a third of national levels of external investment.
 - However, IP income and stock of patents have fallen since 2018/19 from an already low base.

R&D spending

Despite growth in research and development (R&D) expenditure in Greater Lincolnshire, R&D expenditure remains relatively low, particularly in Lincolnshire

- Data presented in the chart is at the ITL2 level, therefore Northern Lincolnshire is combined with Eastern Yorkshire, which includes Hull and East Riding of Yorkshire.
- Total R&D spending in Lincolnshire grew by 6.2% annually between 2015 and 2019 to £68.1m, and by 4.1% in East Yorkshire and Northern Lincolnshire to £187.5m.
- However, R&D expenditure in Lincolnshire remains well below regional and national averages.
 - In 2019, total R&D spending per capita in Lincolnshire was 80% below East Midlands and 85% below UK per capita levels.
 - Lincolnshire ranks fourth lowest out of 41 ITL2 areas at £89 per capita.
- East Yorkshire and Northern Lincolnshire at £200 per capita is closer to the Yorkshire average, but levels per capita remain over a third below the Yorkshire average, and almost two thirds below UK levels. East Yorkshire and Northern Lincolnshire ranks in the bottom 10 ITL2 areas in terms of R&D expenditure per capita.
- North Yorkshire performs strongly, having seen strong growth of 8.7% annually between 2015-19, ranking 12th highest of ITL2 areas. The only other northern English region above North Yorkshire is Cheshire. Many of the top spending regions are from the South East and London, with Eastern Scotland the notable exception.



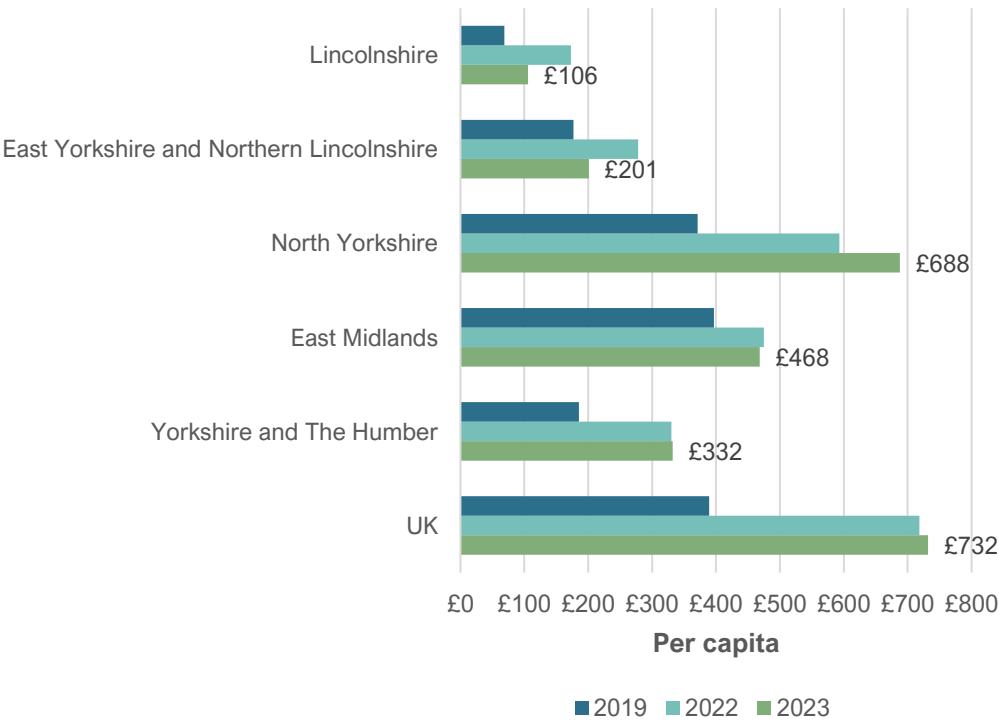
Source: ONS UK gross domestic expenditure on research and development (GERD) by sector of performance and region (International Territorial Level 2 (ITL 2)) 2015-19

R&D spend by businesses

Business R&D expenditure continues to be relatively low in Greater Lincolnshire, especially in Lincolnshire where expenditure has fallen between 2022 and 2023

- Business R&D expenditure in Lincolnshire had risen to £134m in 2022. Although per capita expenditure remained well below regional and national averages at £173, the gap had closed somewhat but has since widened again in 2023, with business R&D down by 38% between 2022 and 2023, the third largest drop across ITL2 areas.
 - Business R&D expenditure has risen 3% in the UK and 2% across Yorkshire between 2022 and 2023.
- Business R&D expenditure totals £83m in Lincolnshire, equating to £106 per capita, the third lowest of 41 ITL2 areas in the UK, and 77% below the East Midlands average and 85% below the UK average.
 - Expenditure has grown by 12% annually since 2019, slightly below 16% across Yorkshire and 18% nationally.
- Business R&D expenditure totals £191m in 2023 in East Yorkshire and Northern Lincolnshire. Growth has been subdued, averaging 4% since 2019. Levels per capita at £201 are ninth lowest of ITL2 areas, 40% below the Yorkshire average and 73% below the UK average.
 - Expenditure is down by 27% from £262m in 2022, the fifth largest drop across ITL2 areas.

Business R&D expenditure (2019, 2022, 2023)

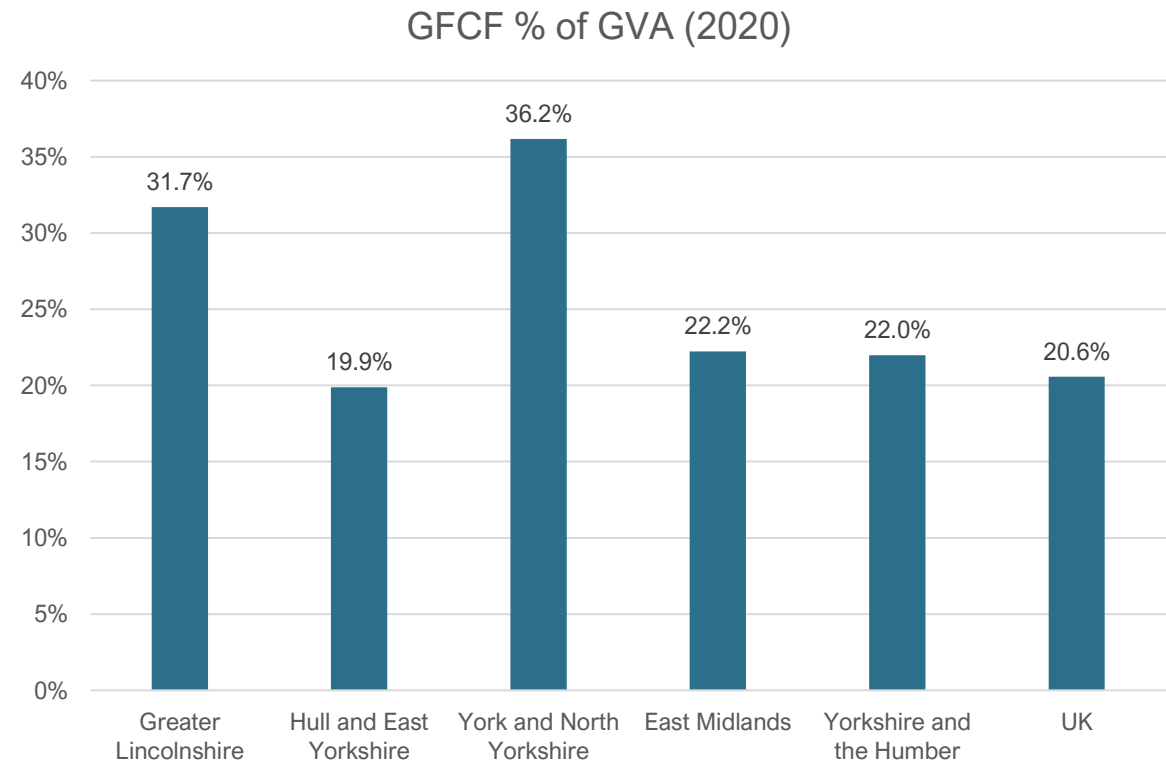


Sources: ONS Business enterprise research and development, UK: 2023; ONS UK gross domestic expenditure on research and development (GERD) by sector of performance and region (International Territorial Level 2 (ITL 2)) 2015-19
Notes: More recent estimates are available for business R&D expenditure at an ITL2 area. The ONS have updated methodology for R&D expenditure and therefore estimates before 2018 are not comparable with data released for 2022 and 2023.

Gross Fixed Capital Formation

As a proportion of the regions' GVA, Greater Lincolnshire has a higher investment level in fixed capital than regionally and nationally using experimental Gross Fixed Capital Formation (GFCF) statistics, although R&D levels remain extremely low

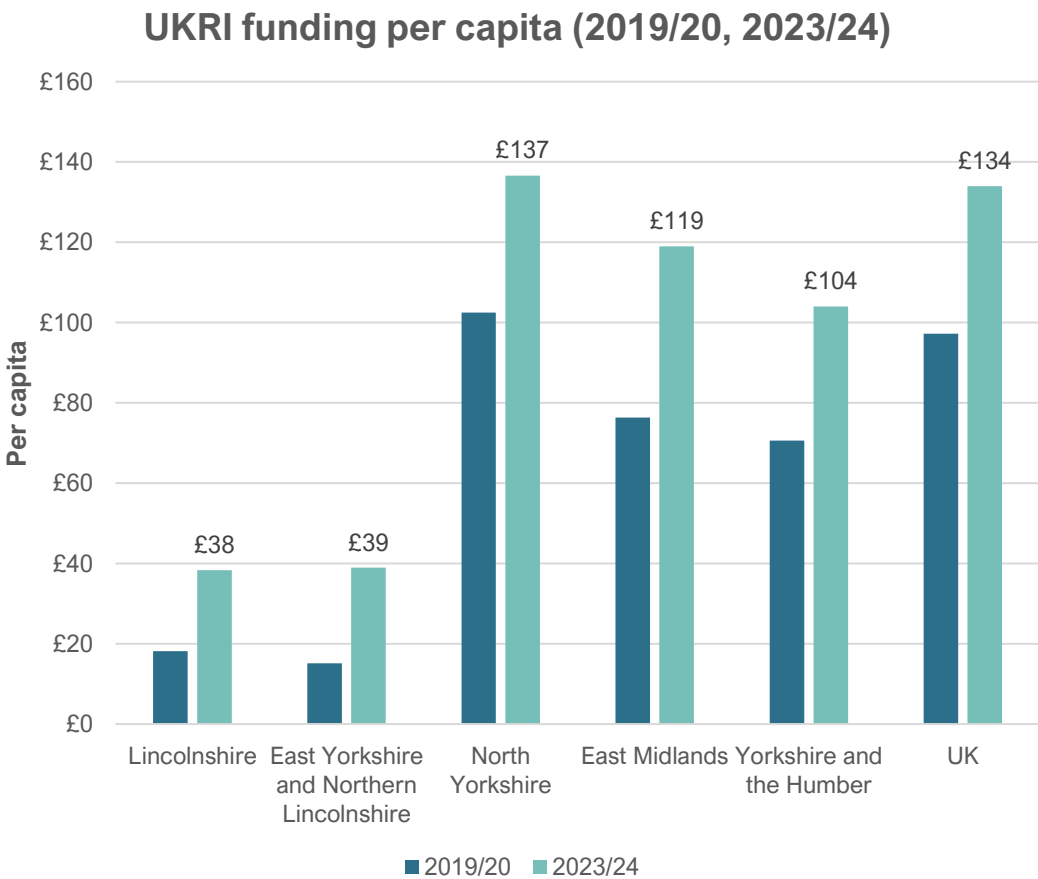
- Data shown in the chart to the right presents experimental statistics from the ONS for regional gross fixed capital formation (GFCF) estimates.
- GFCF represents investment in fixed assets such as infrastructure, machinery, and buildings. Expressing GFCF as a proportion of Gross Value Added (GVA) indicates the level of investment relative to the economic output of a region. A higher proportion suggests stronger capital investment, which can drive long-term growth and productivity improvements.
- GFCF is almost a third of total GVA in Greater Lincolnshire, showing a higher level of investment in fixed capital than regionally and nationally, although below York and North Yorkshire.
- However, relative spending on research & development (R&D) remains extremely low in Greater Lincolnshire, showing that investment levels on the whole are likely low in Greater Lincolnshire.



UKRI funding

Despite significant growth in UKRI funding in Greater Lincolnshire, the area receives a relatively low amount of funding compared to regionally and nationally

- In 2023/24, Lincolnshire received £30m of UKRI funding, up by 21% annually from 2019/20. Funding per capita has risen from £18 to £38 over this period.
- UKRI funding has also risen strongly in East Yorkshire and Northern Lincolnshire by 27% annually to £37m between 2019/20 and 2023/24.
 - East Yorkshire and Northern Lincolnshire and Lincolnshire are in top 10 ITL2 areas which have seen fastest annual rise in UKRI funding over this period.
- However, Greater Lincolnshire continues to receive a relatively small amount of funding despite growth in recent years. Lincolnshire received the 13th lowest amount of funding across 41 UK ITL2 areas and East Yorkshire and Northern Lincolnshire the 14th lowest.
 - Lincolnshire receives one third of the East Midlands average funding per capita and just over a quarter of UK average.
 - East Yorkshire and Northern Lincolnshire receives just over a third of the Yorkshire average and just over a quarter of the UK average.
- North Yorkshire continues to receive a relatively high amount of funding compared to the Yorkshire average, and in line with the UK average.

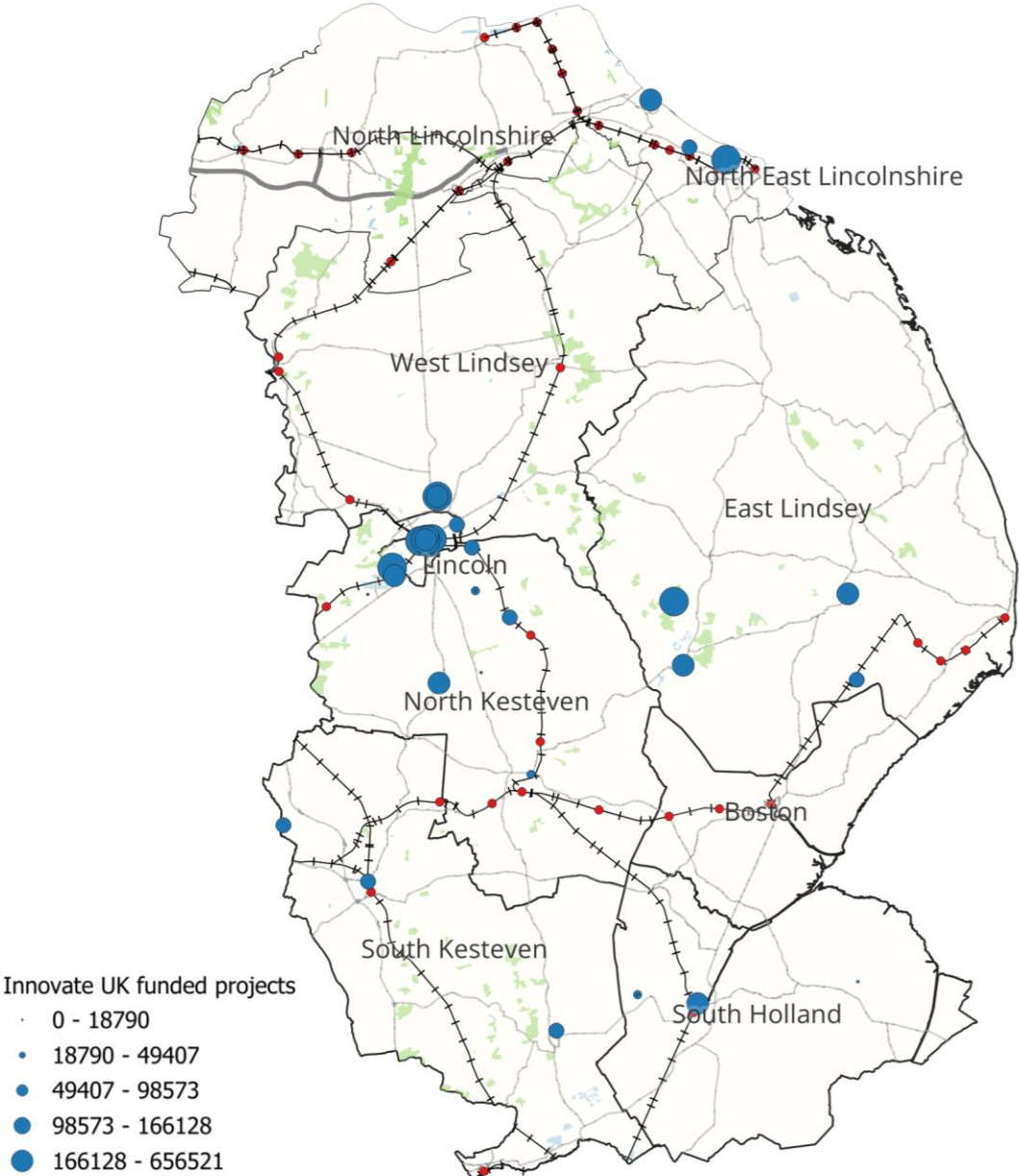


Source: UKRI Geographical distribution of funding (2023/24)

Innovate UK funding

Innovate UK funding in Greater Lincolnshire is primarily concentrated in and around Lincoln, with the area underperforming in attracting high-value projects, securing a total of £6.35 million in 2023/24

- The map on the right illustrates Innovate UK-funded projects across Greater Lincolnshire in 2023/24. Each dot represents an individual project, with the size of the dot corresponding to the project's funding value, larger dots indicate higher-value projects.
- During the 2023/24 period, a total of 58 Innovate UK-funded projects were recorded in Greater Lincolnshire. Of these, 24 were based in Lincoln, indicating a significant concentration of activity in the city. In total, Greater Lincolnshire secured £6.35m in Innovate UK funding over the year, equating to £5.71 per capita (£37.70 across the UK).
- The funded projects were distributed across different types of organisations: 23 were led by micro or small enterprises, 18 by academic institutions, 5 by medium-sized enterprises, and 7 by large enterprises. Notable recipients include Plexsys Interface Products, Agaricus Robotics, the University of Lincoln, and B-Hive Innovations. By sector, 29 of the funded projects were categorised under 'Ageing Society, Health and Nutrition', 10 under the 'Responsive' category, and 6 under 'Clean Growth & Infrastructure'.
- The largest active Innovate UK-funded project in the area is the *Agaricus Robotic Harvester*, led by Agaricus Robotics in partnership with the University of Lincoln. This project seeks to develop the world's first commercial mushroom harvesting robot, contributing to the UK's capabilities in advanced robotics and digital innovation technologies.

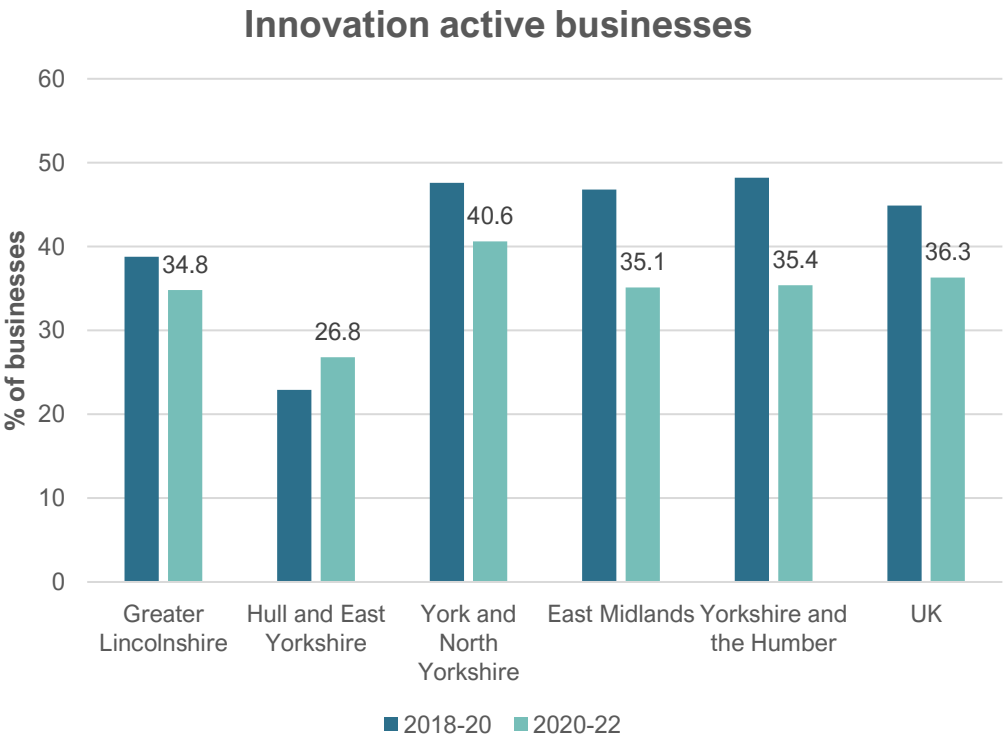


Source: Metro Dynamics analysis of UKRI, Innovate UK funded projects since 2004 (March 2025 update)

Innovation activity by businesses

The proportion of businesses who are classed as innovation active has fallen across areas, although Greater Lincolnshire has seen a less pronounced drop compared to regionally and nationally, and has a similar proportion of innovation active businesses as regionally

- The chart to the right shows the proportion of businesses who are classed as innovation active.
- There has been a decline in the proportion of innovation active businesses across areas. Data are between 2018-20 and 2020-22 so likely to have been impacted by the Pandemic, with restrictions impacting on the ability of many to run their business, and therefore less likely to be engaging in innovation activity.
- The proportion of innovation active businesses in Greater Lincolnshire was lower than regionally and nationally in 2018-20 – compared to the Yorkshire average, the proportion of innovation active businesses in Greater Lincolnshire was 10pp lower and 6pp lower than the UK average.
- Greater Lincolnshire has displayed a strong level of resilience, where the proportion of innovation active businesses is now in line with the Yorkshire and East Midlands averages, and 1.6pp lower than the UK average.
- Greater Lincolnshire ranks tenth lowest of 38 LEP areas. Hull and East Yorkshire is lowest and York and North Yorkshire 17th highest of LEP areas.



Source: Department for Business and Trade UK Innovation Survey 2023

Notes: A business is defined as innovation active if they engage in any of the following activities:

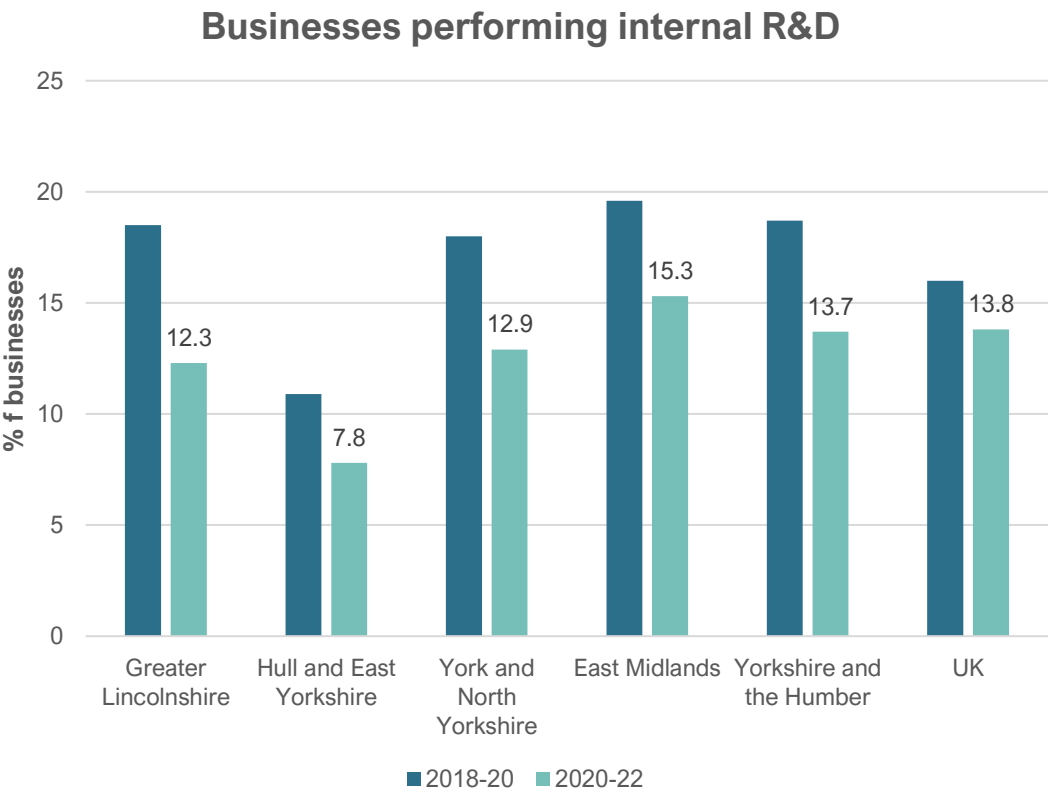
- The introduction of a new or improved product (goods or services)
- Business processes used to produce or supply all goods or services that the business has introduced, regardless of their origin. These innovations may be new to business or new to the market
- Engagement in innovation projects not yet complete or abandoned

Businesses performing R&D

There has been a decline in the proportion of businesses performing R&D across all areas, but Greater Lincolnshire has seen one of the sharpest declines of comparator areas

- Between 2018-20, an estimated 18.5% of businesses in Greater Lincolnshire performed internal R&D, in line with the Yorkshire average and above national levels.
- However there has been a decline in the proportion of businesses performing internal R&D along with the proportion classified as innovation active between 2018-20 and 2020-22.
- In 2020-22, 12.3% of businesses were estimated to be performing internal R&D, now below the Yorkshire and UK averages, have been above the UK average in 2018-20.
- Greater Lincolnshire ranks tenth lowest of LEP areas in proportion of businesses performing internal R&D, Hull and East Yorkshire ranks fourth lowest.
- Using data from Beauhurst, 17 enterprises in Greater Lincolnshire have raised funds in the last 6 months, including Brendon Chemical Company, who in total have raised £989k in fundraising, and Cambridge Nucleomics, who have raised £546k total fundraising.
- 14 enterprises in Greater Lincolnshire have secured grants in the last six months, including Ai Digital, AllFocal Optics, and Aque Bioculture.

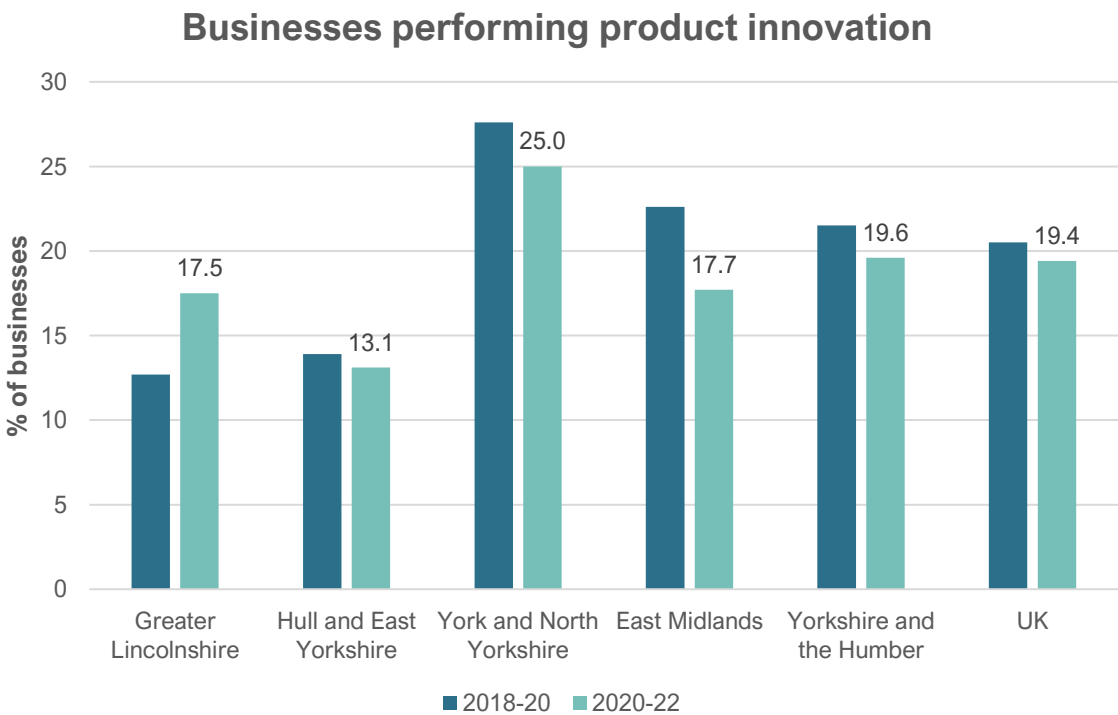
Source: Department for Business and Trade UK Innovation Survey 2023; Beauhurst (2025)



Product innovation

There has been a rise in the proportion of businesses in Greater Lincolnshire developing new or improved products/services, but the proportion of businesses engaging in product innovation remains relatively low

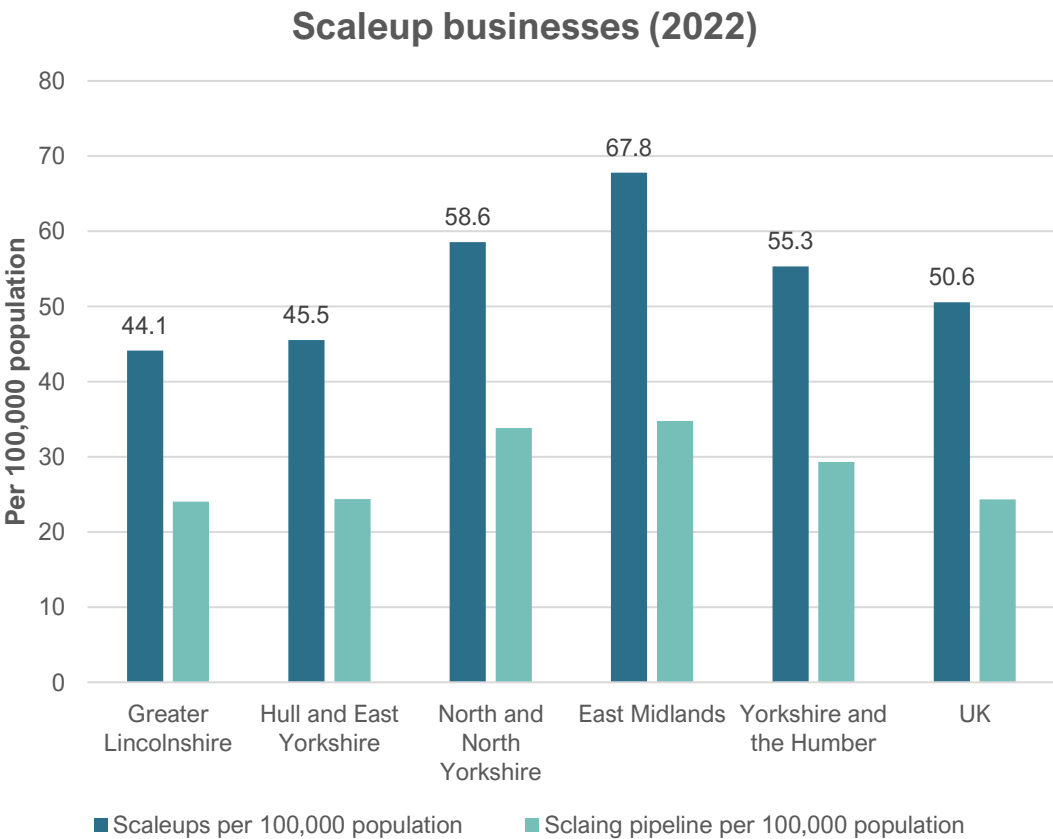
- Between 2018-20 and 2020-22, the proportion of businesses developing new or improved products or services rose from 12.7% to 17.5%, countering declines seen in other innovation related business activity, and trends seen amongst comparator areas.
- However, the proportion of businesses performing some kind of product innovation remains low in Greater Lincolnshire compared to the Yorkshire and UK average.
- Greater Lincolnshire ranks 11th lowest of 38 LEP areas in terms of product innovation, Hull and East Yorkshire is the lowest.
- York and North Yorkshire is the eighth highest of LEP areas and is the highest from the North of England.



Scale-ups

There are a growing number of businesses reaching scaleup stage, but there remains a relatively low number of scaleups in Greater Lincolnshire and relatively few businesses approaching that stage compared to regionally and nationally

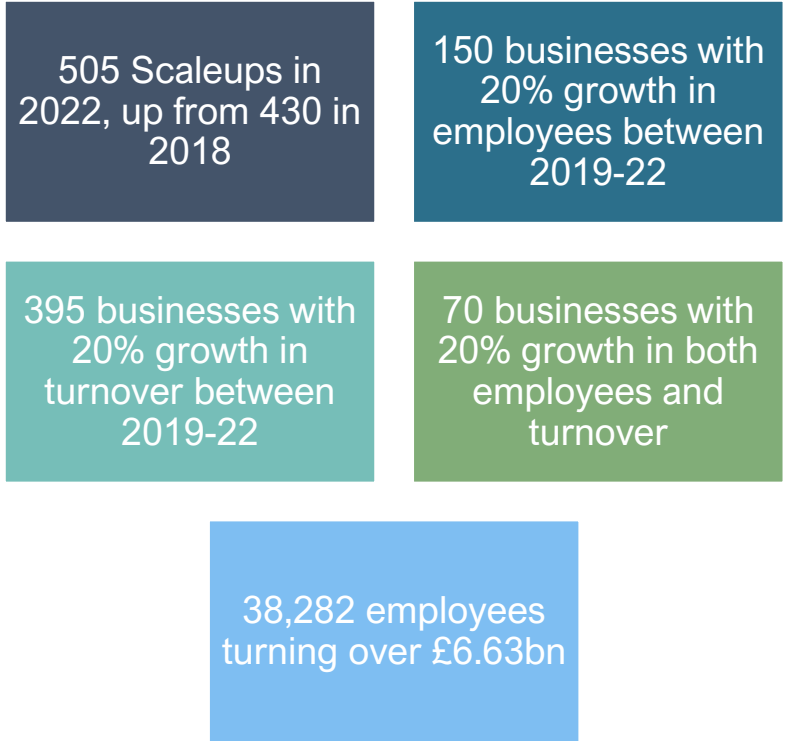
- In 2022, it is estimated there were 505 scaleup businesses in Greater Lincolnshire (a scaleup is a businesses which has increased their turnover and/or employee numbers annually by more than 20 per cent over a three-year period and have 10 employees at the start of that period). This is up by 4% annually since 2018, compared to a 0.2% increase across the UK.
- There are 275 businesses in the scaling pipeline stage (businesses that are not yet at scaleup growth rates but are growing turnover or employment at 15-19.99% annually over the three-year period). This has increased by almost 5% annually since 2018 whereas nationally this has fallen by -0.7% annually.
- Greater Lincolnshire has a similar scaling profile to Hull and East Yorkshire, but compared to regionally and nationally, Greater Lincolnshire has a relatively low number of scaleups at 44 per 100,000 population compared to the East Midlands (68 per 100,000 population) Yorkshire (55 per 100,000 population), and nationally (51 per 100,000 population).



Source: Scaleup Institute Annual Report (2024)
Notes: Due to changes in geography data are reported between 2020 and 2024 Scaleup Institute Annual Reports, we cannot compare how the number of scaleups has changed in Hull and East Yorkshire, and North and North Yorkshire.

Scale-ups in Greater Lincolnshire

The Scaleup Institute produce LEP area reports on the Scaleup population. Below summarises what this looks like for Greater Lincolnshire, with key sectors: agriculture and farming, distribution; food and drink processors; property/land development and construction; and wholesale



Top 5 scaleups by turnover growth

- The Wool Room - manufactures machine washable wool-based bedding, cushions, and blankets.
- Boss Cabins - manufactures storage infrastructure for construction companies and builders such as towable cabins and storage cabins.
- Polyco Heathline - manufactures a range of safety gloves for the industrial, medical and consumer markets.
- Woodthorpe Garden Centre - runs a garden centre with a plant department, a children's play area and restaurant serving afternoon tea.
- Rutland Cycling - sells bicycles, both in stores and online, and provides bicycle hiring services.

Top 5 scaleups by employee growth

- Olivares Tapas Bar- operates a restaurant that specialises in tapas and Spanish cuisine.
- Alderson House - provides residential care and support services for adults with mental health conditions.
- Carlton Cleaning - industrial and commercial cleaning services.
- J&Y Webber Services - a Bluebird Care franchisee, a domiciliary care services chain.
- Quadrant Building Control - provides building inspection services designed to ensure that its clients are compliant with building regulations.

Innovation signals

- *Beauhurst is a digital data platform that sources and extracts data from many locations to create a database of UK private companies. Beauhurst provides detailed signals on companies, categorising them based on various innovation and business growth indicators.*
- *The data presented here focuses on businesses that have an active Companies House status, and a trading address located within Greater Lincolnshire LEP area.*
- Among the companies identified through innovation signals, 7.8% of businesses are within the manufacturing industry, and 7.4% of within agriculture, land farming and forestry.
- Within businesses identified under the innovation signal, 427 companies hold patents including Frontier Agriculture, British Steel and Limagrain UK.

Categories of businesses	Signals	Number of businesses
Growth	Equity fundraisings*, Debt fundraisings*, MBO/MBI*, Accelerator*, 10% scaleup*, 20% scaleup*, High growth list*, Acquired, IPO	1,095
Innovation	R&D grant*, Academic spinout*, Patent	497
Environmental	Clean and renewable energy, Green transport, Green building & infrastructure, Sustainable food & farming, Environmental accolades	439
Social and Governance	Gender pay equality Gender equality of directors Age diversity of directors Social impact accolades	3,051
Risk	Liquidation & insolvency, CCJ, Short runway, Down round	2,211

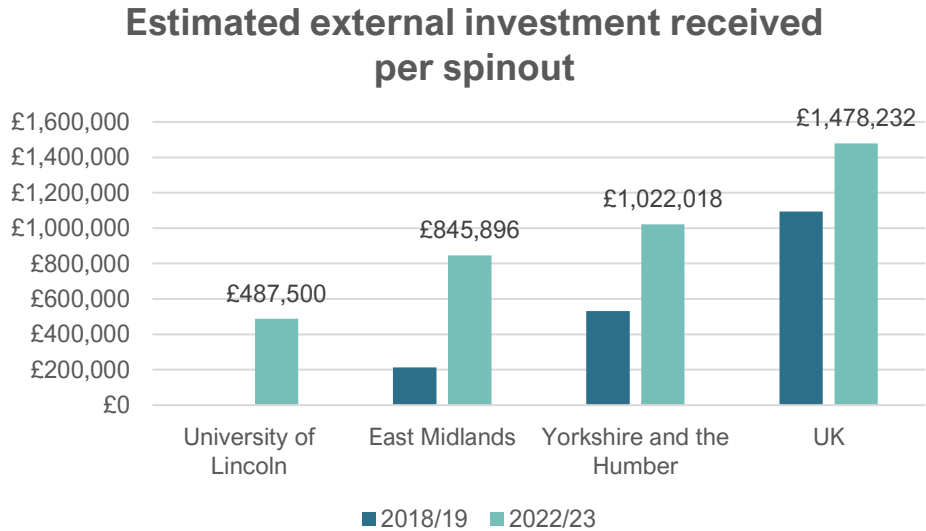
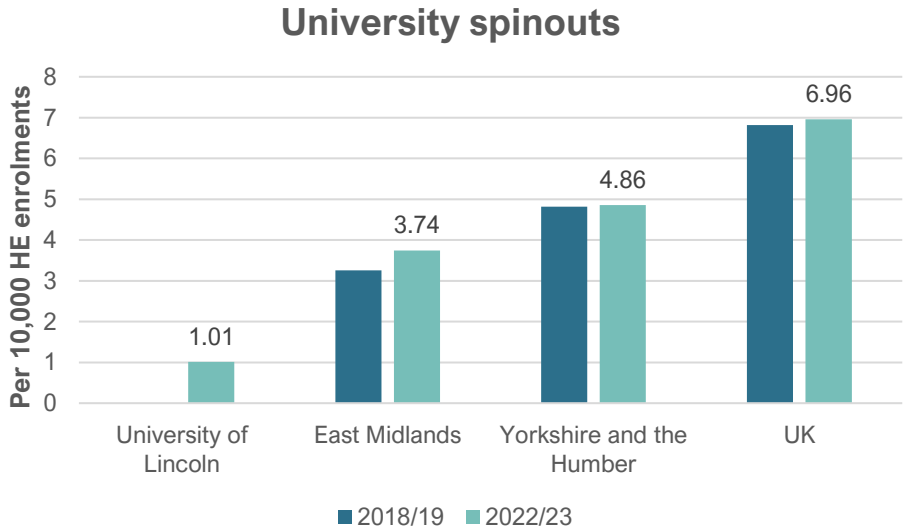
Source: Metro Dynamics analysis of Beauhurst data *These signals only include businesses who have been tracked by Beauhurst, and therefore only represents a sample.

Spinouts

The University of Lincoln is still a relatively young university and this is reflected in its commercialisation activity. The University of Lincoln has a relatively low number of spinouts, not helped by a relative lack of external investment received.

- In 2022/23, there were 2 active spinouts at the University of Lincoln, showing signs of progress in commercialisation activity at the university. There are no spinouts at Bishop Grosseteste Lincoln.
- However, as can be seen in the top chart, the number of spinouts is low compared to regional and national comparators. Lincoln is still a relatively new university and their commercialisation capabilities will not yet be fully developed and something which could grow in the coming years.
- Regardless, the lack of investment received is not conducive to a growing commercialisation space at the university, where per spinout, the University of Lincoln received around half the East Midlands average and a third of national levels.
- Using updated data from Beauhurst reports there are eight academic spinouts with a registered address in Greater Lincolnshire. Of these, four spinouts focused on data provision and analysis, two focused on application software, and two on agriculture, land farming and forestry. The largest spinout in Greater Lincolnshire by amount raised through fundraising is Surface Generation, a deep tech supplier of cutting-edge manufacturing solutions, raising £10.2m.

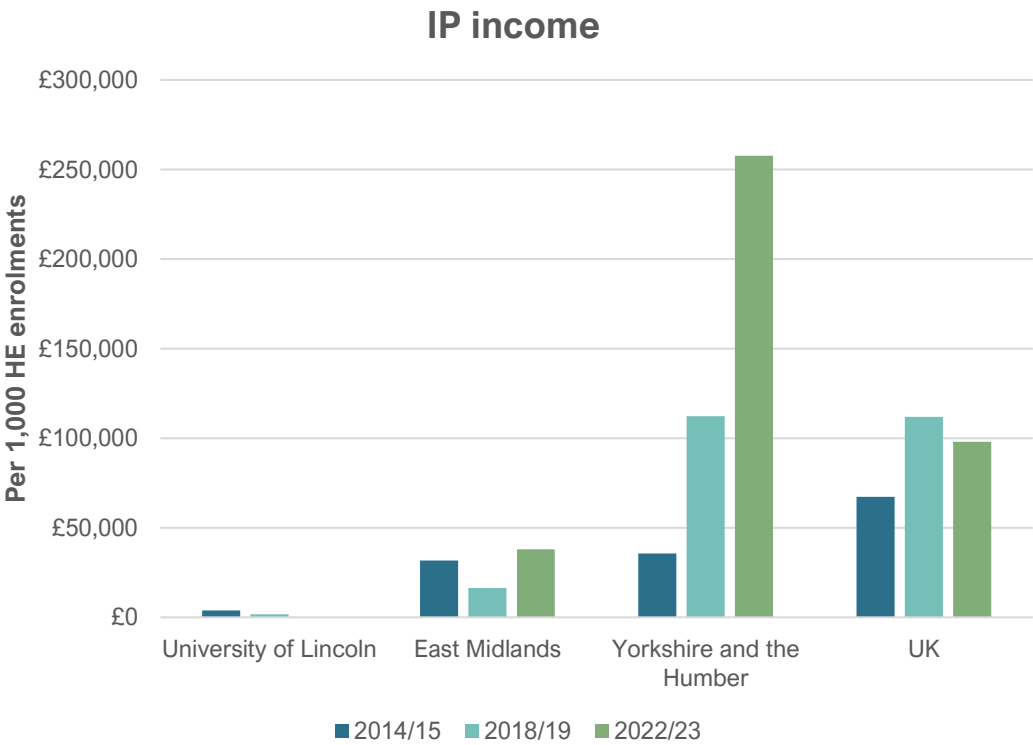
Source: HESA Intellectual property, start-ups and spin-offs (2024); Beauhurst (2025)
Notes: The UK average for external investment discounts the University of Cambridge, which received £28bn in external investment in 2022/23. If included the UK external investment received per spinout would have risen from £1,090,015 to £15,156,412 per spinout.



IP income

Lack of commercialisation capacity/developing capability is highlighted again with low levels of Intellectual Property (IP) income at the University of Lincoln, where IP income has fallen since 2014/15

- IP income at the University of Lincoln fell from £52,000 in 2014/15, to £26,000 in 2018/19 and latest estimates for 2022/23 report only £1,000 of IP income. Bishop Grosseteste Lincoln had no IP income.
- Regionally and nationally there has been a rise in IP income, with a particularly strong rise in Yorkshire, which is concentrated in the University of Sheffield, which accounted for 94% of the £59m in IP income in 2022/23.
- IP income per 1,000 HE enrolments has fallen from £3,920 to £51 at the University of Lincoln, well below comparator levels, although the Yorkshire average for 2022/23 has been uplifted due to higher than usual IP income at the University of Sheffield.
- The average IP income generated by UK universities is £98,000 per 1,000 HE enrolments.

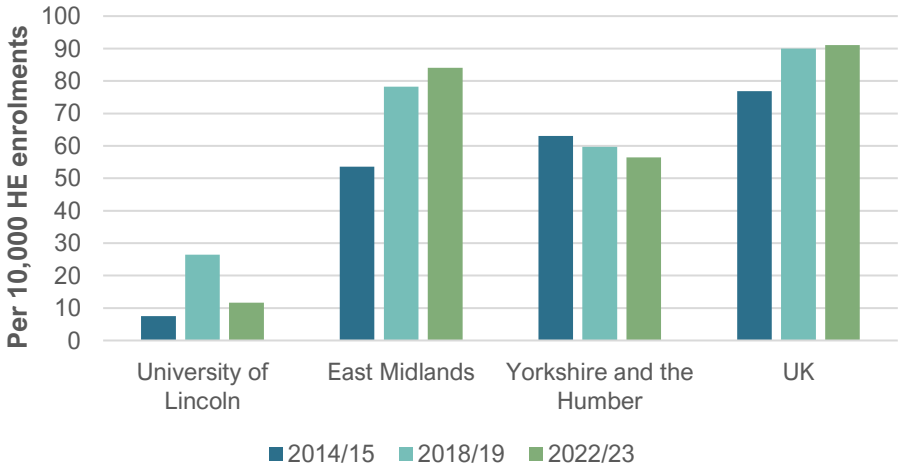


Patents

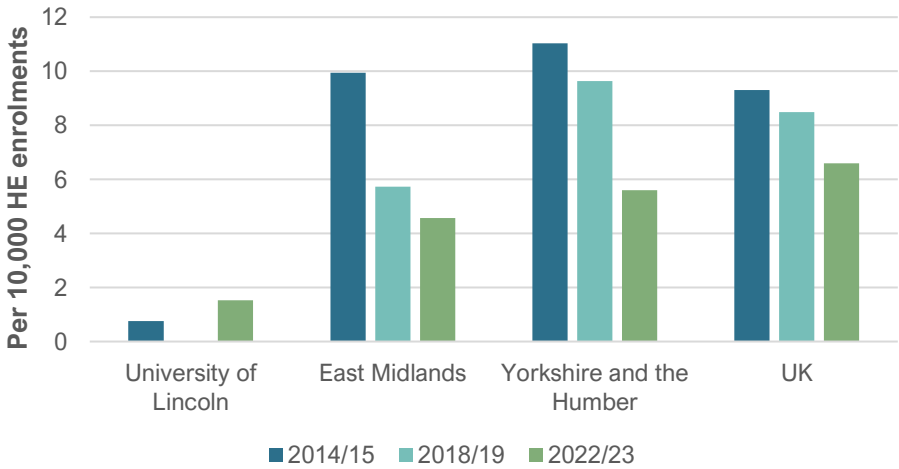
The University of Lincoln also has a lower portfolio of patents as compared to regionally and nationally

- *IPO patent data is only available at the regional ITL 1 level, so to get an idea of patent activity within Greater Lincolnshire, we have used HESA data on activity at higher education institutions.*
- In 2018/19, the University of Lincoln had a patent portfolio of 42, strong growth from 10 in 2014/15 however the portfolio has shrunk to 23 in 2022/23.
- As can be seen in the top chart, this means that the University of Lincoln has a relatively small patent portfolio of 11.67 per 10,000 HE enrolments as compared to over 80 per 10,000 HE enrolments across the East Midlands and UK universities.
- The University of Lincoln made 3 new patent applications in 2022/23.
 - This equates to 1.52 patent applications per 10,000 HE enrolments.
 - Despite falls in patent applications, particularly in the East Midlands, patent application rates in the East Midlands and nationally remain over double the rate for the University of Lincoln.

Patent portfolios at universities



Patent applications at universities



Source: HESA Intellectual property, start-ups and spin-offs (2024)

Annex

Clean energy sector definition

Below lists out the RTICs used to formulate the clean energy sector definition

- **Energy Generation:** Bioenergy; Hydrogen; Hydropower; Nuclear; Nuclear Fusion; Offshore Wind; Onshore Wind; Renewable Thermal; Solar
- **Energy Management:** AI and IoT; Energy Management Systems; Smart Grid; Smart Meter
- **Energy Storage:** Batteries; Hydrogen; Mechanical; Thermal; Uninterruptible power supply
- **Net Zero:** Agritech; Building Technologies; Carbon Capture; Diversion of Biodegradable Waste from Landfill; Energy Cooperatives; Energy Storage; Green Finance; Grid; Heating; Low Carbon Consultancy, Advisory & Offsetting Services; Low Carbon Energy Generation; Low Emission Vehicles; Pollution Control and Mitigation; Renewable Energy Planning Database; Renewables; Waste Management and Recycling

Annual Population Survey

The Annual Population Survey has been used to find estimates for employment, economic inactivity, qualifications and occupations in Greater Lincolnshire. However response rates have been falling so there are concerns over the accuracy of data.

- ONS' Annual Population Survey (APS) is the source for many statistics including economic inactivity and employment rates, qualifications attainment, employment by occupation.
- However fewer people have been responding to the APS in recent years, which the ONS has identified as a challenge to data reliability. Response rates have fallen from 39.05% in 2019 to 14.74% in 2023.
- Figures from the APS have therefore been downgraded from Official Statistics to 'Official Statistics in development' and therefore should be treated with caution.
- To increase the number of survey responses, the ONS reintroduced face-to-face interviews from October 2023 and boosted the sample in October 2023 and from January 2024 onwards.
- This means the data has become more reliable, and the ONS expects the LFS dataset size to increase further as the boosted sample takes effect.
- However, the ONS said 'during this period, there may be more instability in LFS estimates as they are likely to be affected by these collection changes' and that the changes will not be fully included in the sample until May 2025.

Social Mobility Index

Each of Promising prospects; conditions of childhood; labour market opportunities for young people; and innovation and growth combine data into a single composite score to display which areas in the UK are considered more favourable in terms of social mobility than others.

Promising prospects: Data on the UK local authorities with the most 'promising prospects' for 25 to 44 year olds – measured by levels of education, professional work, and earnings. The index measures how well young people from similar socio-economic backgrounds do in education and the labour market.

Conditions of childhood: Data on the conditions of childhood in UK local authorities – measured by childhood poverty, and the qualifications and occupation levels of parents. This index captures whether the conditions children grow up in are good for promoting social mobility.

Labour market opportunities for young people: Data on labour market opportunities for 16 to 29 year olds across the UK, measured by their occupation level and unemployment rate. This index shows which areas offer more or less favourable employment opportunities for young people.

Innovation and growth: This index shows which local authorities in the UK offer more or less favourable conditions to help promote innovation and economic growth – this is measured by each area's broadband speed, business spending on research and development, and percentage of residents with postgraduate qualifications.



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