



# Suffolk Coastal Profile and Outlook

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Report prepared for the Suffolk Coastal  
District Council

Date: November 2010



Note: The forecasts presented in this report are  
consistent with the EEFM Autumn 2010 outlook

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# Summary

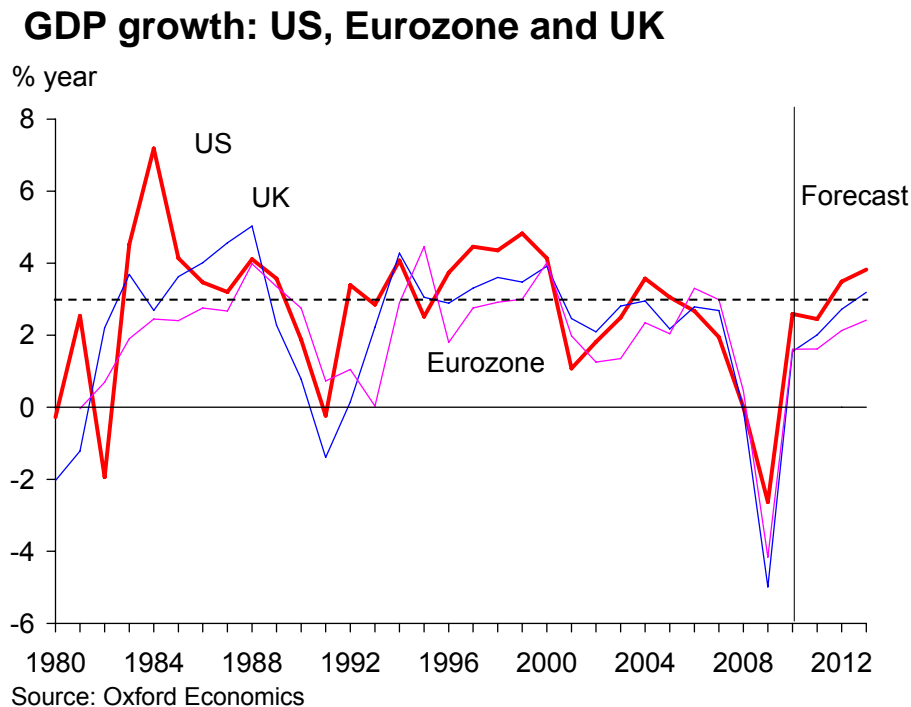
# Summary

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- The UK economy is now fully in economic recovery. Though there are still risks to the recovery including the stability of the global recovery and impacts of the public spending cuts.
- Suffolk Coastal appears to have escaped most recession impacts on its employment. It has one of the least vulnerable economies of any local area.
- Increases in taxes and charges and the knock-on impacts on wealth, spending power and consumer confidence are all likely to impact the outlook for the economy.
- However, Suffolk Coastal will be one of areas least affected by the cuts
- Unemployment is expected to remain relatively low over the future although higher than in the past.
- Suffolk Coastal will remain a popular retirement and residential destination but migration pressures will depend on national factors as well as local property prices.
- The requirement for dwellings will be 11,000 in Suffolk Coastal by 2027, bringing the total number of dwellings to 69,000 – a little ahead of the RSS target of 68,500 by 2031.

**The UK economic context -  
re-balancing the economy will slow growth**

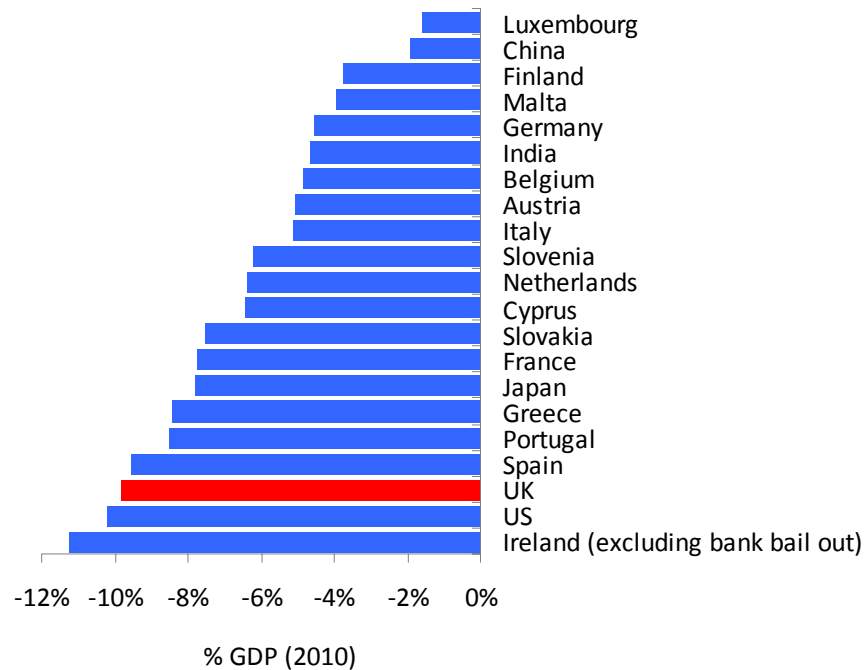
# World economy on road to recovery?



- Suffolk Coastal's economy has typically grown at close to the UK average rate (2.6% a year)
- Future growth will be determined most of all by what happens to the UK economy
- Also, the UK grows at a similar rate to other major developed economies. Hence global economic conditions are also crucial

# Debt is an issue

General government balance as a % of GDP, 2010



Source: Oxford Economics

- As we know government deficits have ballooned since 2008 and many countries have policies to reduce their deficits.
- These policies involve lower government spending and higher tax (=less for the rest of us to spend).
- UK government wishes to get its deficit down to a normal level of under 3% of GDP by 2015
- This involves cuts in public services and capital spending of 11% by 2015
- As always it is capital spending which suffers most (down by a third over 5 years)

# Long run effects on governments and consumers

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## GDP and its components (average % growth), UK

	Pre-recession (1997-07)	Recession (2008-10)	Post recession (2011-20)
Household spending	3.4	-0.5	2.2
Investment	5.0	-5.9	4.5
Govt consumption	2.2	1.4	-0.6
Exports	4.7	-1.8	5.7
Imports	6.4	-1.9	4.1
GDP	2.9	-1.1	2.5

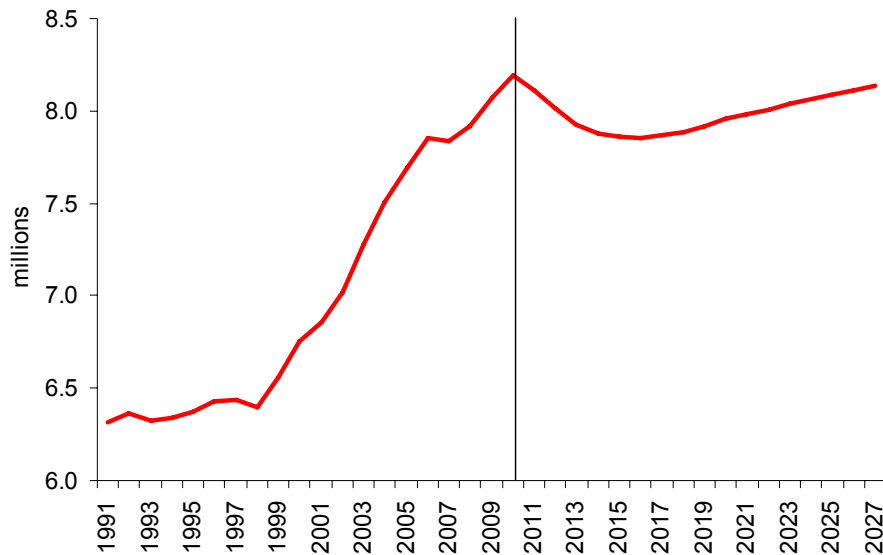
Source: Oxford Economics

- Our forecast for the UK economy is that recovery is underway, but
- Future growth will be a little slower than over the Blair years.
- This suggests a growth rate for GDP in Suffolk Coastal of around 2% per year
- This is consistent with an expansion of around 200 extra jobs a year
- Household spending will grow much slower and government spending will decline
- Much depends on the growth of exports – helped by a weak pound



# Impact of the public spending cuts...

UK public sector employment growth, 1991-2027 (millions)

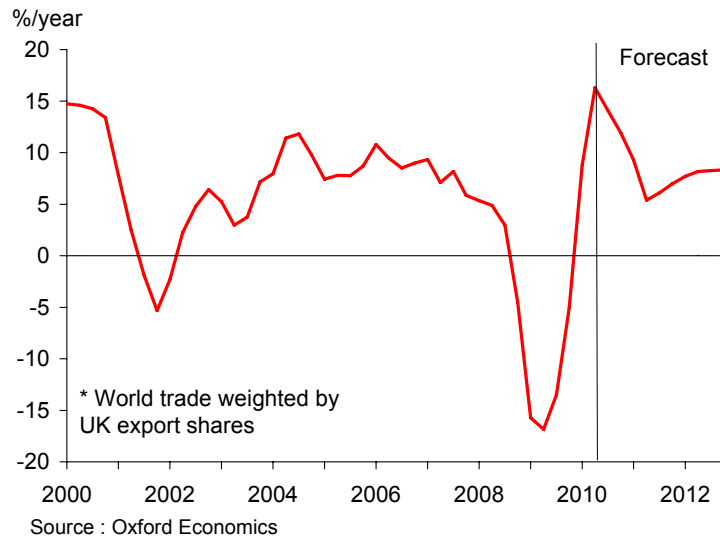


Source: ONS, Oxford Economics

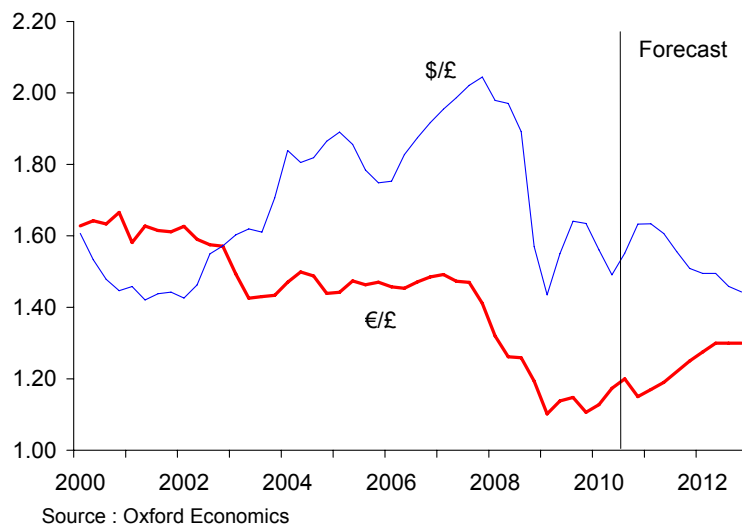
- We expect public sector employment to be lower than now for at least the next decade.
- This will have an impact on Suffolk Coastal even though only 18% of jobs in the area are in public admin, health, social services and education, compared with the regional average of 22%.
- There will be a larger impact on Ipswich where almost one in three jobs are in these sectors, and hence indirectly on Suffolk Coastal through commuters

# Can we rely on net trade to drive the recovery?

## UK: Export demand\*



## UK: Exchange rates

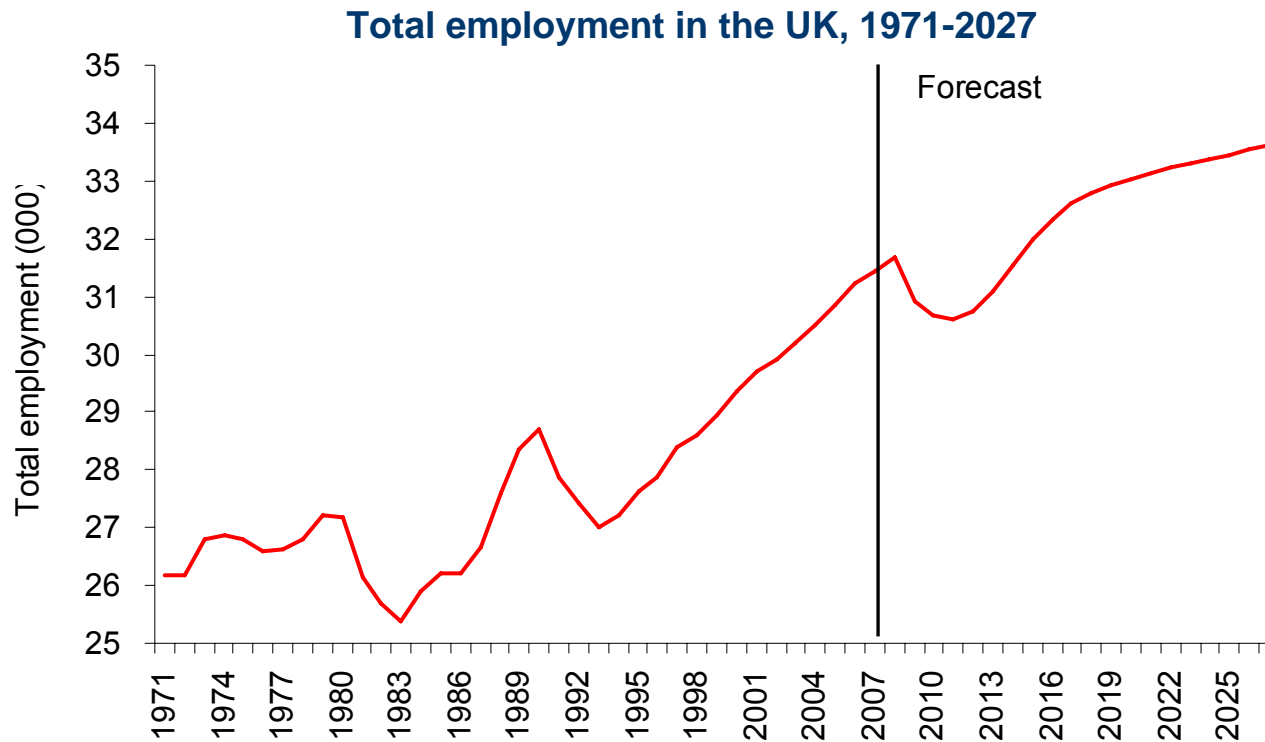


- Much will depend on exports to drive the recovery.
- This is important to Suffolk Coastal indirectly because of its influence on the national and regional economies
- And most directly because of its influence on Felixstowe
- Demand for UK exports are expected to surge in 2011 although UK imports will grow more slowly
- Export growth is being helped by low value of the pound especially against the Euro, but we expect some recovery in the value of sterling in the next few years.

# Summary

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- After the largest ever jobs boom up to 2007 the UK has had a relative shallow recession in jobs terms
- A relatively good recovery should see jobs total reaching the 2007 peak again by 2015
- After that growth will be much slower



Source: ONS, Oxford Economics

# Suffolk Coastal in profile

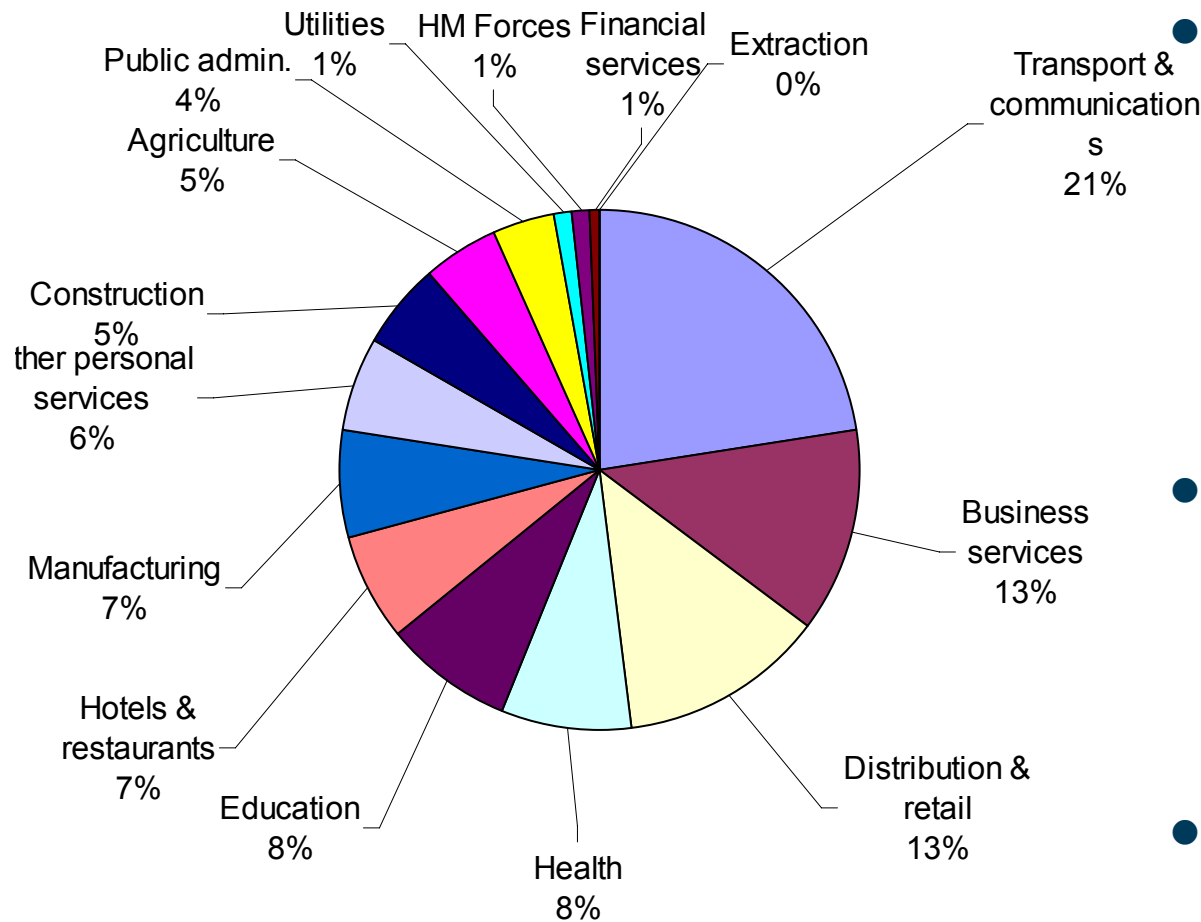
## The Suffolk Coastal economy in context – people and jobs

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- 124,000 people live in the area, (17% of the total population in the county of Suffolk and 2% of the East region).
- Population has increased by 9,400 people in a decade
- Net migration into the area since 2001 was 1,100 people per year.
- Employment in the Suffolk Coastal area in 2008 (the latest year for which we have published data) was 56,600 jobs.
- In the ten years to 2008, total employment grew by around 6,500 jobs, mostly concentrated in the business services and public sectors
- Manufacturing suffered a smaller decline in employment than the rest of the UK

# Sectoral composition of Suffolk Coastal's economy...

Percent of total employment, Suffolk Coastal, 2008

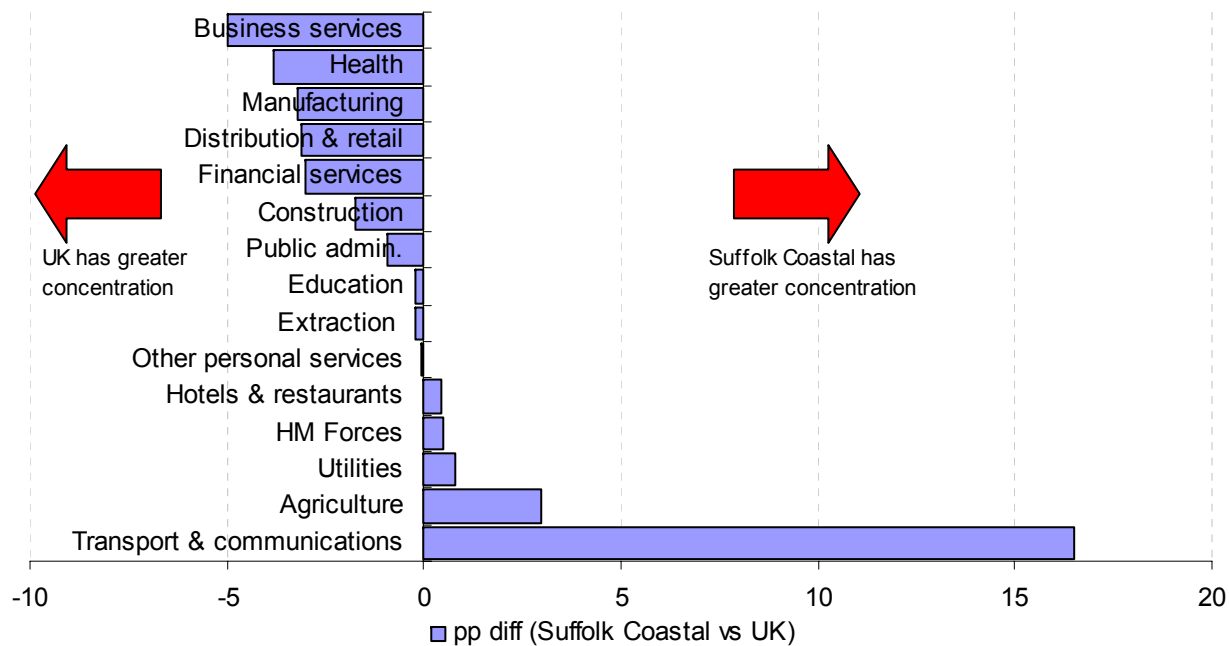


- The transport and communications sector is critical to the economy of Suffolk Coastal accounting for over one fifth of its jobs (i.e. Felixstowe, and BT at Martlesham)
- The planned expansion of Felixstowe South is likely to bring up to 1000 more jobs to the local economy over the decade ahead.
- Manufacturing is a small sector but employs about the average for the region

Source: ABI, Oxford Economics

# ...reveals limited professional services...

Employment per sector, Suffolk Coastal's pp difference with the UK, 2008



Source: ABI, Oxford Economics

- Suffolk Coastal highly over-represented in transport & communications
- Also somewhat over-represented in agriculture and energy and tourism
- Under-represented in the 'urban' services i.e. financial & business services, distribution and health

## ... but transport, energy and telecoms are the core

Key sectors employment Suffolk Coastal, 2008

	Multiple of UK average share of total employment	Employees, 000's, (2008)
Other supporting water transport activities	74	2,947
Processing of nuclear fuel	18	496
Production of electricity	16	566
Activities of other transport agencies	12	1,403
Manufacture of electrical equipment for engines and vehicles not elsew here classified	12	139
Sea and coastal water transport	12	295
Farming of poultry	10	10
Telecommunications	9	3,006
Wholesale of flow ers and plants	8	125
Agents involved in the sale of agricultural raw materials, live animals, textile raw materials and semi-finished goods	8	42

- The most highly concentrated sector within Suffolk Coastal in terms of employment is 'other supporting water transport activities' which employed almost 3,000 people in 2008 and is 74 times more represented compared with the GB levels of employment.
- Four of the ten highly concentrated sectors within the area are transport and communications related.
- Nuclear fuel and utilities are also highly concentrated within the local area.



# The economy is becoming more service oriented

## Employment change by sector in Suffolk Coastal (000's)

	1998-2008	2008-2010
Agriculture	-0.7	0.0
Extraction	-0.1	0.0
Manufacturing	-0.3	-0.9
Electricity, gas & water	-0.2	0.0
Construction	-0.8	-0.2
Distribution & retail	-0.5	-0.5
Hotels	0.4	0.1
Transport & communications	-0.1	0.4
Financial services	-0.1	0.0
Business services	4.6	1.0
Public admin & defence	1.2	0.1
Education	1.2	0.2
Health	1.3	0.4
Other personal services	0.6	0.4
Total	6.5	0.9

Source: ABI, Oxford Economics

## Business services employment in Suffolk Coastal (000's)

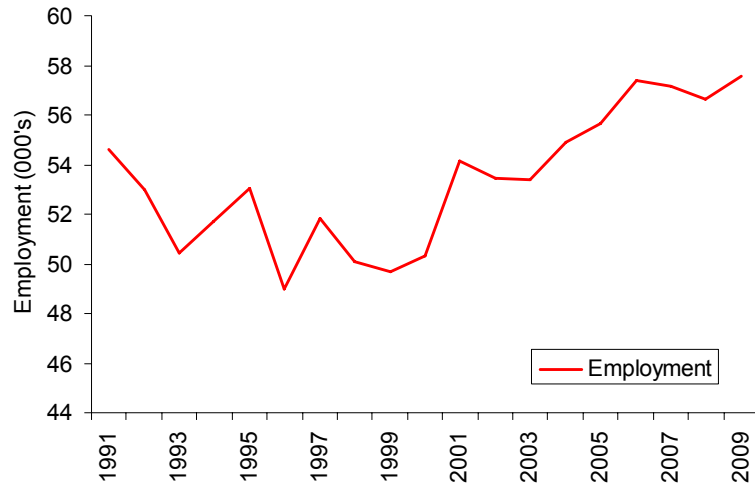
	1998-2008	2008-2010
Computer related services	0.4	0.0
Labour recruitment, security & cleaning	1.7	0.2
Other business services incl. call centres	0.9	0.0
R&D, technical testing	0.2	0.0
Real estate & renting	0.7	0.3
Other tradable services	0.7	0.5
Total business services	4.6	1.0

Source: ABI, Oxford Economics

- As in other areas there is a strong tendency for agricultural and industrial sectors to lose jobs
- And for the services to expand
- One exception is retail and wholesale distribution which is losing jobs in Suffolk Coastal, probably at the expense of Ipswich
- Two-thirds of all new jobs have been in business services
  - A third of these are employment agency jobs
  - However all branches of professional services have expanded (is this working at home or decentralisation from Ipswich?)
- The remainder of the new jobs were in public services (4,000 extra jobs since 1998)

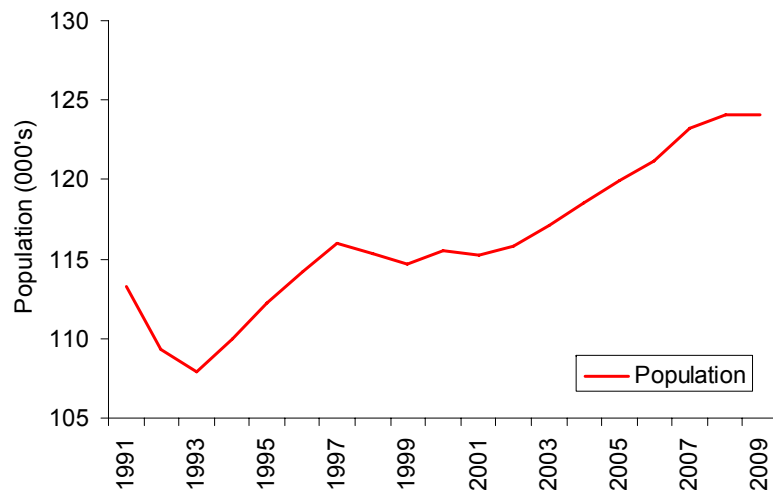
# A decade of growth...

## Employment in Suffolk Coastal, 1991-2009



Source: EEFM, Oxford Economics

## Population in Suffolk Coastal, 1991-2009

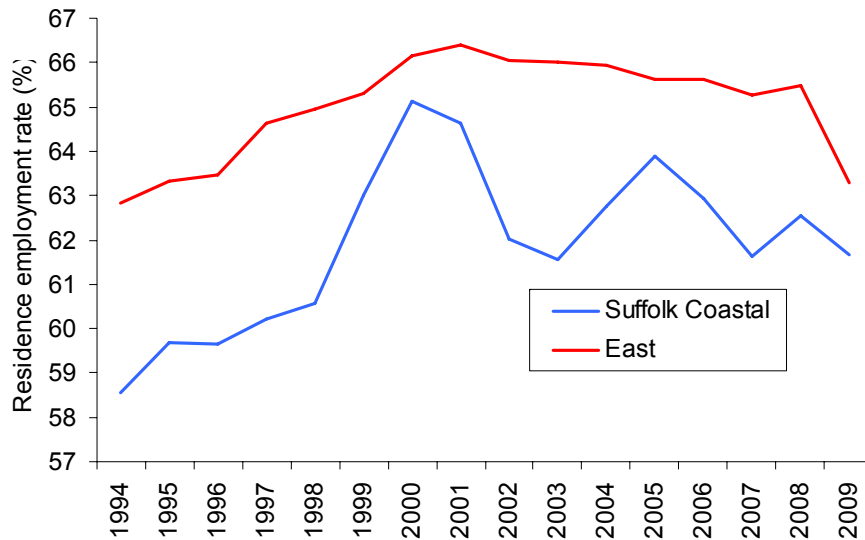


18 Source: EEFM, Oxford Economics

- Employment growth has been largely positive since 1996 with 9,000 further jobs created by 2009.
- The total level of population in Suffolk Coastal was 124,000 people in 2009.
- The trend in population has been a steady increase with an additional 12,000 people between 1991 and 2009.
- The pick up in population growth after the 2003 period may reflect the surge in migration from Eastern European countries however this has since fallen as the economic downturn began to take effect.

# However employment rates have fallen...

Residents employment rate, Suffolk Coastal and East (%), 1994-2009



Source: EEFM

Note: Resident employment rate is calculated as a proportion of all people aged 16-74 to remain consistent with the Census

- The proportion of residents aged 16-74 who are working (62%) is below the regional average and has been falling
- This could reflect in-migration of retirees or may indicate that there is a greater proportion of outsiders taking the new jobs.

## ... impacting upon commuting

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Commuting destinations, 2001

	% of residents working in
Suffolk Coastal	73%
Ipswich	12%
Mid Suffolk	3%
Babergh	3%
Waveney	2%
Tendring	1%
Colchester	1%
South Norfolk	1%

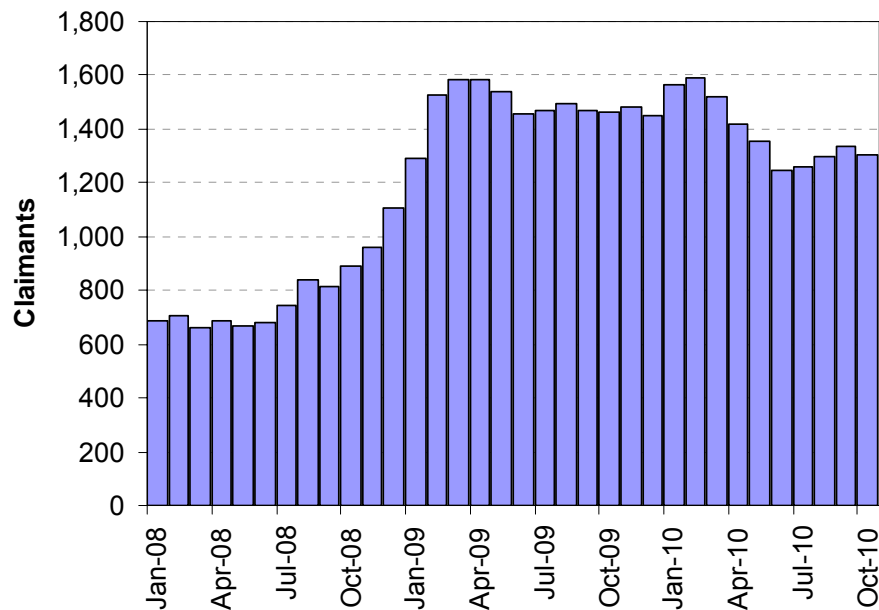
Source: Census

- The 2001 census of population suggests that 73% of Suffolk Coastal's residents work within the area, with one in eight working in Ipswich
- We estimate that the number of commuters has increased by about 600 people since 2001.
- The working-age population has increased by 3,500 in Suffolk Coastal since 2001, due to net migration averaging around 1,000 a year

# The impact of the recession is evident in the unemployment data

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Unemployment, Suffolk Coastal, Jan 08 – Oct 10

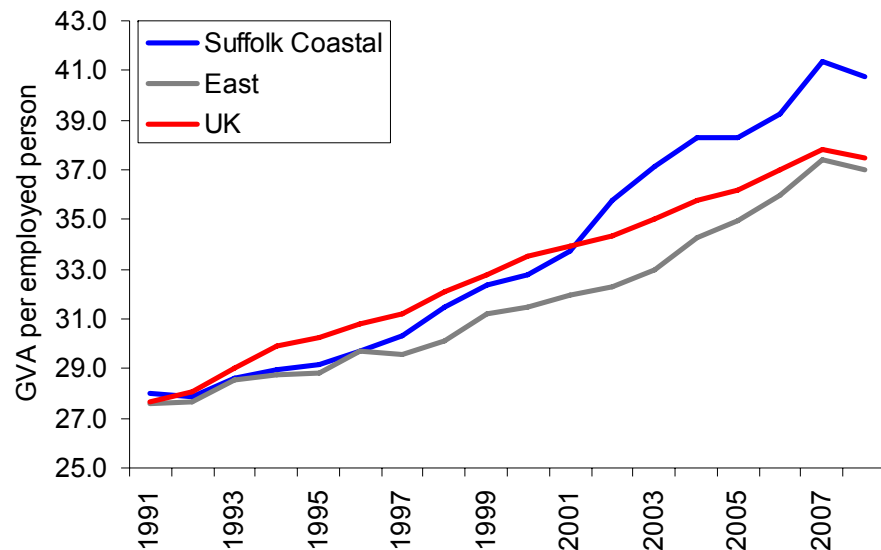


Source: Claimant Count, Nomis

- Unemployment doubled from mid-2008 to mid-2009
- Since Summer 2009 the number of claimant unemployed has slowly declined but is still double the pre-recession level.
- It is possible for both unemployment and employment to increase within an area at the same time due to migration or commuting

# Productivity

**GVA per employed person in Suffolk Coastal, East and the UK, 1991-2008**

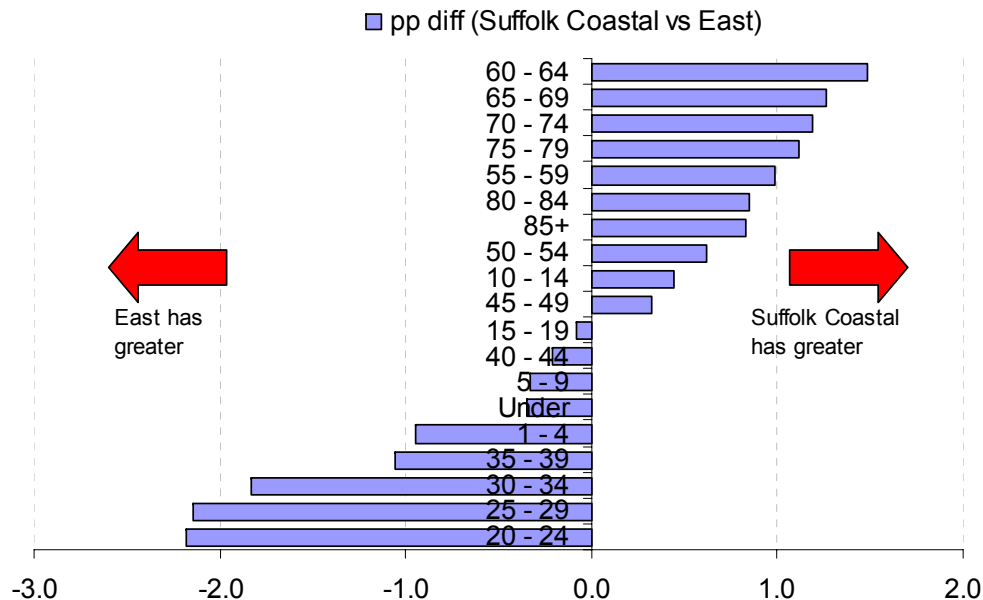


Source: ABI, Regional Accounts, Oxford Economics

- Productivity in Suffolk Coastal has to be estimated since reliable data is unavailable
- It is usually measured as total incomes per employed person (gross value added per employed person)
- Our estimate is that productivity is now higher than the regional or national average having grown faster since 1991.
- If correct this may reflect the presence of capital intensive and well paid activities

# An elderly age profile

Population breakdown by age group, Suffolk and East, 2009



Source: Nomis

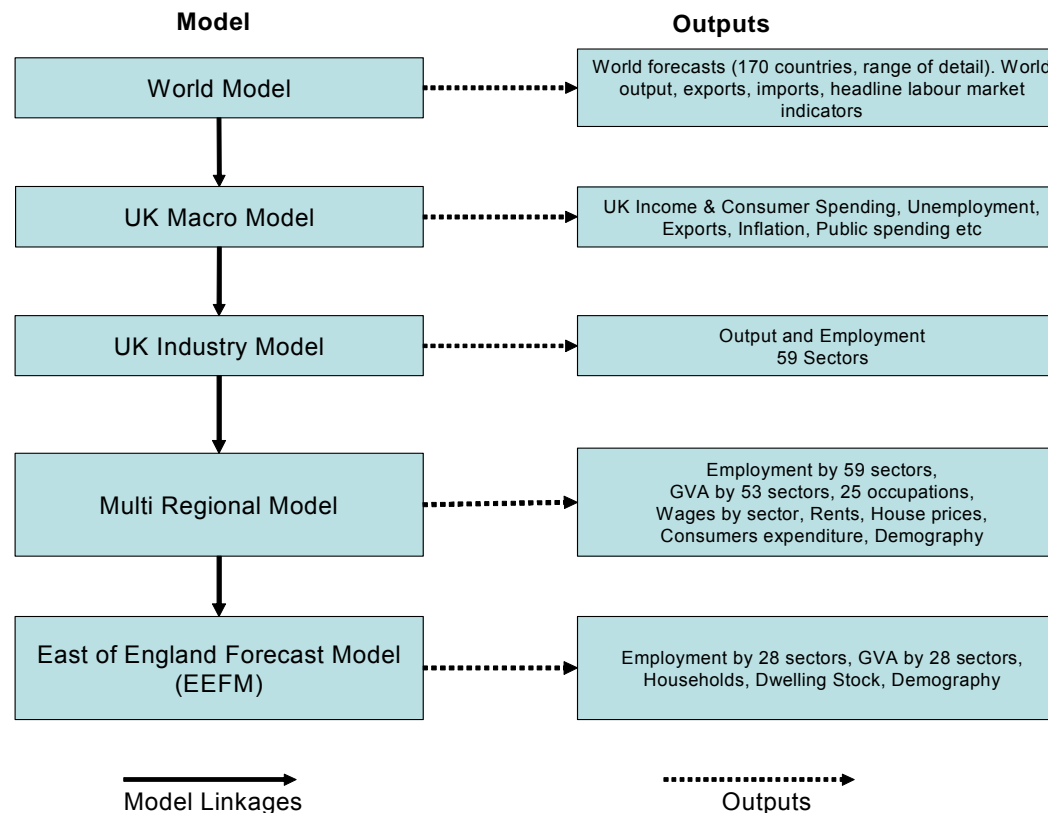
- Suffolk Coastal is home to a higher proportion of people who are over the age of 65 (22%) than in the East (17%) or in UK as a whole (16%)
- Consequently the proportion of people of working age relative to total population at 56% is below the regional average of 61%
- A large retired population adds to local demand for housing and for goods and services through pension incomes – without the need for jobs or workplaces
- At the same time this decreases tax revenues from business rates and increases demand for elderly care etc.

# The outlook



# The East of England Forecasting Model (EEFM)

- The EEFM holds a vast amount of data and projections for each local authority which is collected from a wide variety of sources. The forecasts produced are based on proven forecasting techniques and consistent with the full suite of OE economic models.
- Global factors such as changes in oil prices, commodity prices and exchange rates are reflected in the UK and in turn at regional and local level including in Suffolk Coastal.



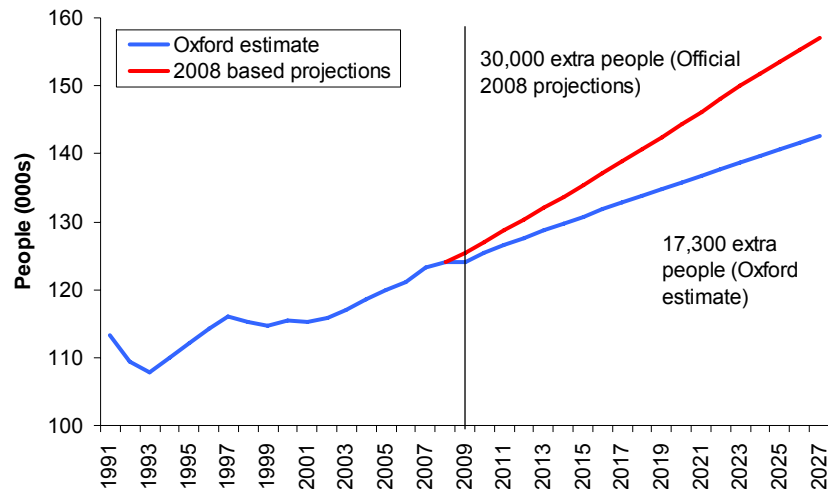
## EEFM – key assumptions

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- Suffolk Coastal's **employment forecasts** are based on past trends (in shares of region's jobs in each sector).
- **Migration forecasts** depend on projected local unemployment rates but importantly also on UK and regional migration
- **Demand for housing** reflects population trends but also key assumptions on the number of people per dwelling
- The current base forecasts do not include specific estimates for Felixstowe South but does include a forecast that employment in transport will rise by 1,000 by 2027

# What path for population?

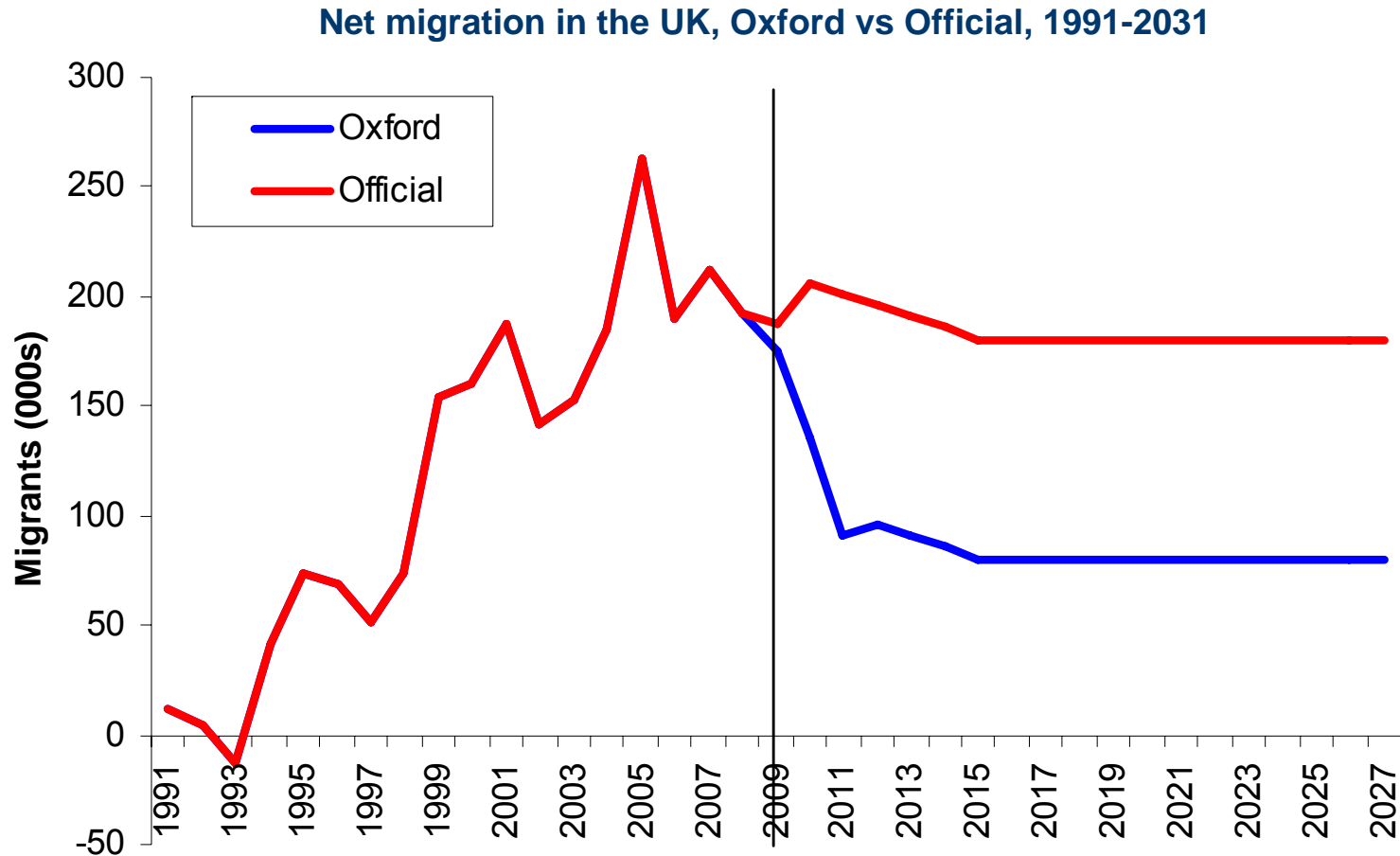
Total population, Suffolk Coastal, 1991-2027



Source: ONS, Oxford Economics

- Population is forecast to grow by an **additional 17,300 people** over the period 2010-27. Though this is significantly below the official projections which would suggest growth of 30,000 people over the same period.
- The key underlying assumption behind this growth is the difference in assumptions around net migration into the UK. The official projections suggest that average long term net migration could be as high as 180,000 migrants each year.
- However, the official migration assumption suggests that there will be 130,000 migrants per annum from the New Commonwealth alone. It has never been this high and we consider this assumption to be unrealistic.
- Our assumption is lower at 80,000 net migrants per year (see next slide for visual comparison).

# UK migration assumption – Oxford vs Official

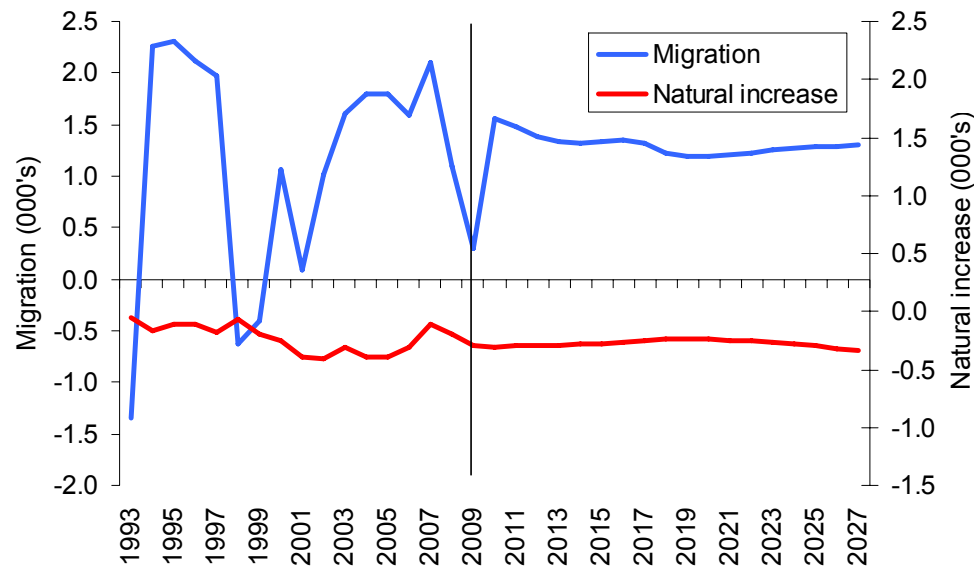


Source: Government Actuary Department

Note: Official projections are based on 2008 data and therefore do not take into consideration the data now published for 2009

# High migration likely to continue

Net migration and natural increase Suffolk Coastal, 1992-2027

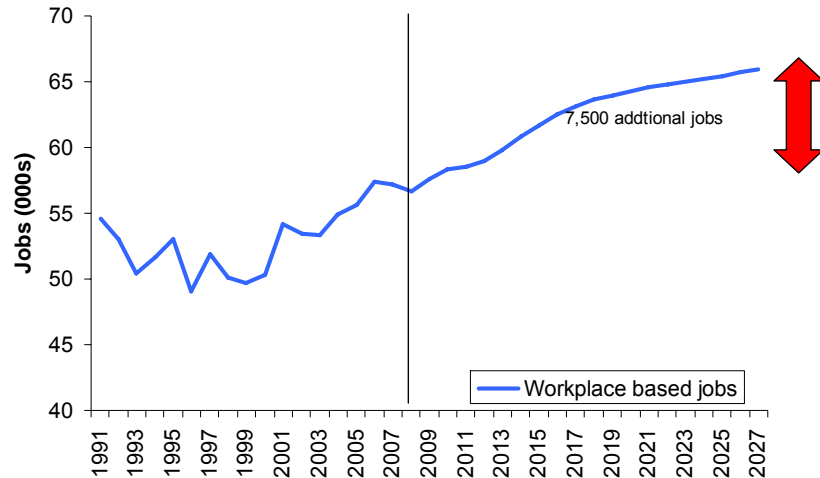


Source: ONS, Oxford Economics

- Migration is expected to average 1,400 (net) per annum.
- There are around 500 **fewer in-migrants than we would expect** at Suffolk Coastal's low unemployment, this is likely to reflect planning constraints and high house prices.
- Deaths expected to continue to out-number births

# Service sectors to lead recovery...

Total employment, Suffolk Coastal, 1991-2027



- Little impact of recession - a resilient economy
- An **additional 7,500 jobs** are forecast over the period 2010-2027

- This is similar to last 17 years

Sectoral employment, Suffolk Coastal, 2010-2027

	2010-2027
Agriculture	-0.6
Extraction	0.0
Manufacturing	-1.0
Electricity, gas & water	-0.2
Construction	0.3
Distribution & retail	1.4
Hotels	0.5
Transport & communications	1.8
Financial services	0.1
Business services	4.2
Public admin & defence	-0.1
Education	0.0
Health	0.4
Other personal services	0.9
Total	7.5

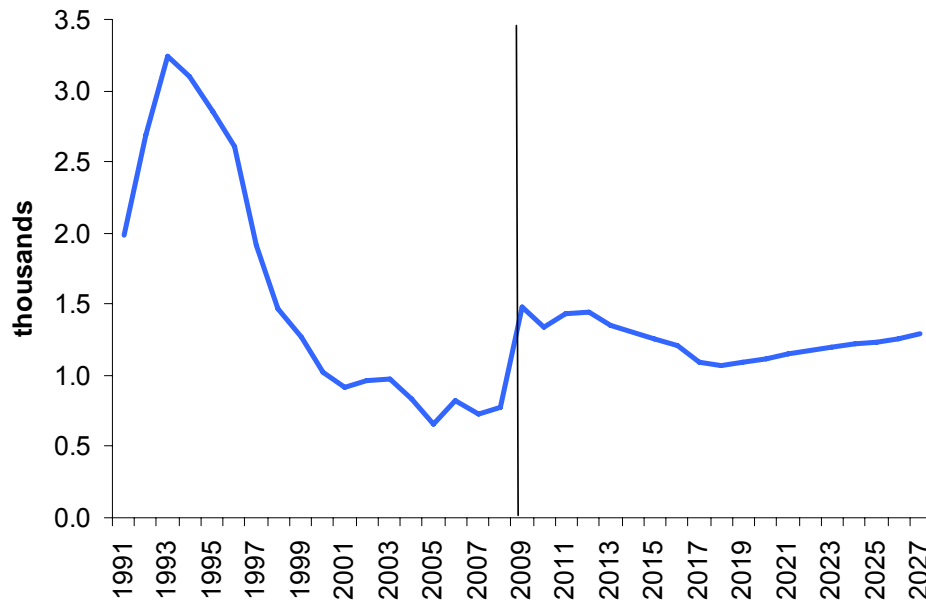
Note: total includes employees within Her Majesty's Forces

- Most new jobs expected to be in business services (including agency jobs) and connected with Felixstowe South

- The forecasts assume a continuation of nuclear power generation at Sizewell

# Unemployment – climbing further?

Number of unemployed (000s), Suffolk Coastal, 1991-2027

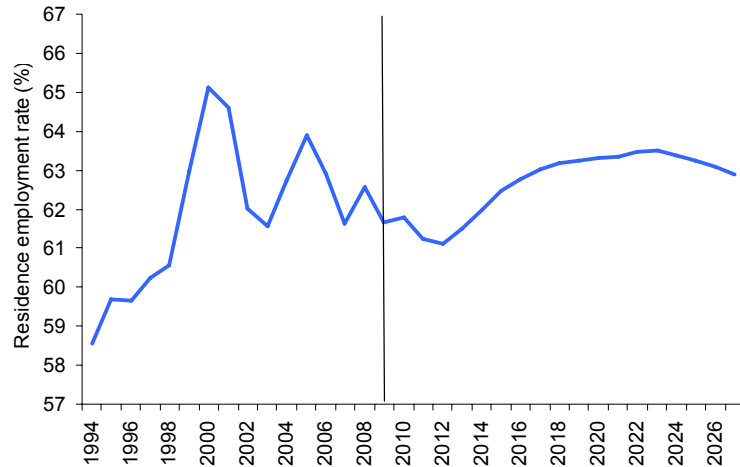


Source: Nomis, Oxford Economics

- Unemployment remains remarkably low
- For many of the unemployed the recession will last much longer than a year or so as they will struggle to return to the labour market with a possible mismatch of skills with the needs of the labour market.
- Unemployment is expected to remain above 1,000 within Suffolk Coastal over the medium term
- Unemployment is expected to fall from 2013 onwards before beginning to rise again in 2018. This reflects changes to the retirement age where people have to remain as part of the labour force for longer.

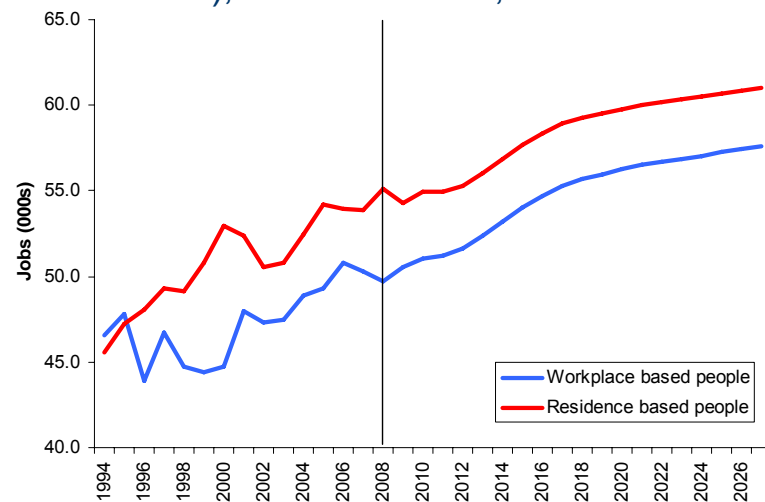
# Residence employment to fall in the short run

Residence employment rate, Suffolk Coastal, 1991-2031



Source: Annual Population Survey

Residence and workplace based employment (people based), Suffolk Coastal, 1991-2031



Source: Annual Population Survey, ONS, Oxford Economics

- The resident employment rate is expected to fall back a little as a result of the recession, however after 2012 it is forecast to begin to rise again as the economic recovery gathers pace.
- By 2020, the forecast suggest the resident employment rate will have returned to its 2005 level.
- After 2020 we expect the resident employment rate to fall again reflecting changes to the retirement age.
- Commuting levels are expected to remain much the same as they are now.



## Suffolk Coastal one of least vulnerable to cuts

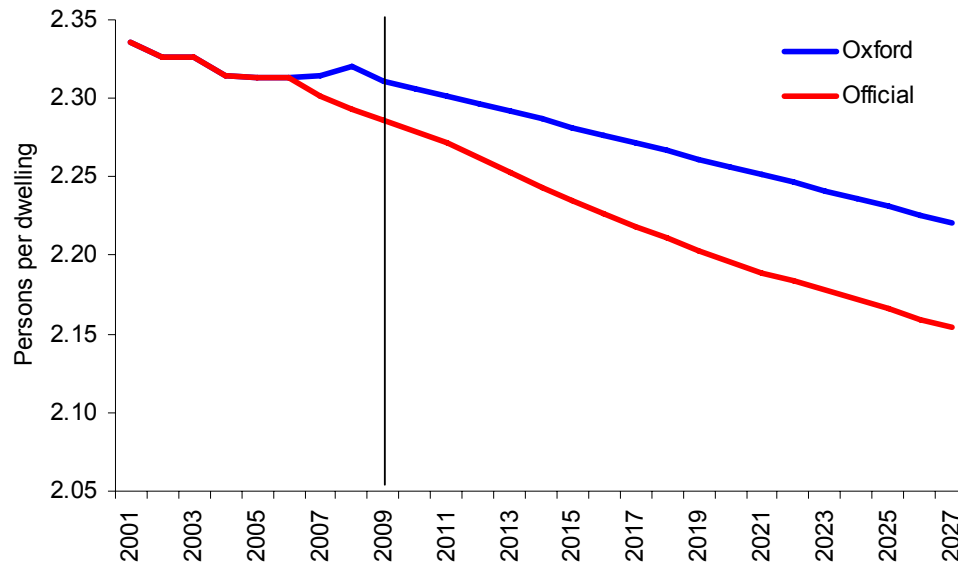
RISK INDEX		RESPONSE INDEX		COMBINED INDEX	
LA	Rank	LA	Rank	LA	Rank
Hastings	1	Tower Hamlets	1	Wansbeck	1
Wansbeck	2	Westminster	2	Middlesbrough UA	2
Middlesbrough UA	3	Kensington and Chelsea	3	Rhondda, Cynon, Taff	3
Dundee City	4	City of London	4	Hastings	4
Lambeth	5	Ealing	5	Caerphilly	5
Inverclyde	6	Hounslow	6	Plymouth	6
Liverpool	7	Trafford	7	Thanet	7
Lewisham	8	Uttlesford	8	Knowsley	8
Denbighshire	9	Craven	9	Denbighshire	9
Clackmannanshire	10	Broxtowe	10	Liverpool	10
Suffolk Coastal	386	Suffolk Coastal	182	Suffolk Coastal	338

Source: Oxford Economics

- Oxford Economics have constructed a local risk index as a means of illustrating how different parts of the country are likely to be affected by the challenges of the public spending cuts.
- Of the 434 local authorities, Suffolk Coastal ranks 386<sup>th</sup> and therefore is not expected to have a high level of risk from the impending spending cuts.
- Suffolk Coastal ranks 182<sup>nd</sup> on the response index which measures which areas might be better placed to respond to a shock even if they are at risk.

# Occupancy rates – Oxford vs Official

Occupancy rate in the East, Oxford vs Official, 1991-2031



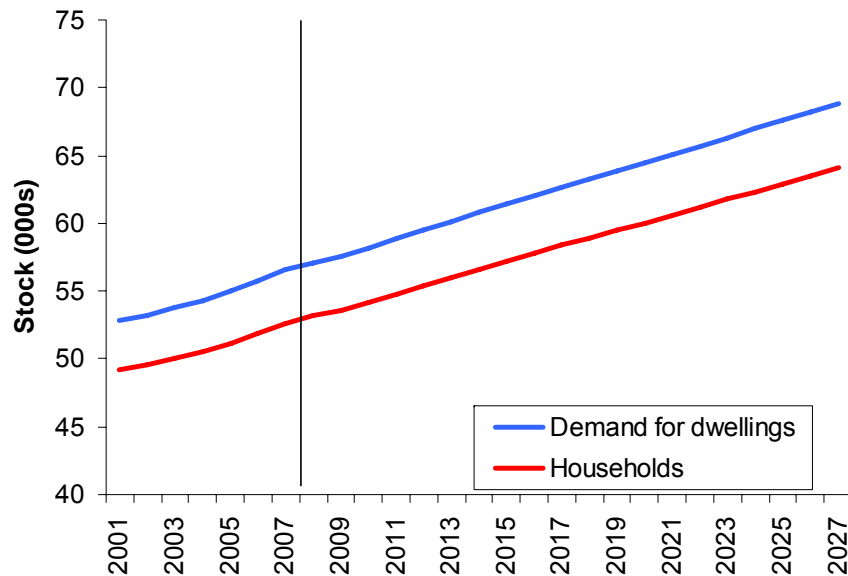
Source: Department of Communities and Local Government

Note: Official household projections are based on 2006 data and therefore do not take into consideration the data now published for 2008-2009

- The number of people per dwelling is assumed to continue falling due to:
  - further growth of ‘single living’
  - Lower migration.
- The dwellings forecast is very dependent on this assumption
- Our forecast suggests a slower fall in numbers of people per dwelling
- Official 2006-based household projections suggest a more rapid fall but are too pessimistic by 2009

# Housing forecasts

**Demand for dwellings and households, Suffolk Coastal, 1991-2027**



Source: Department for Communities and Local Government, Oxford Economics

- A further 17,300 people are expected to come to the region by 2027.
- Due to this, 11,000 extra dwellings are needed by then, bringing the total number of dwellings to 69,000 in 2027.
- This is a little ahead of the old RSS target of 68,500 dwellings by 2031 and is between the NHPAU high and low scenarios.
- If fewer houses were built we would expect house prices to rise to a level which deters some people from coming to live in the area with a consequent impact on service sector jobs.

Risks and opportunities – how might the outlook  
be different?

# Key uncertainties UK and Global

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There are a number of key downside uncertainties which could change the outlook for the decade ahead. These include:

- Global recovery stalls
- Consumer spending falls as a result of income squeezes and a further tightening of credit availability by banks
- Inflation: could lead to an overly early resumption of high interest rates
- The knock-on impacts of spending cuts could turn out to be bigger than expected and/or crowding in (i.e. the private sector steps in to meet the demand that the public sector previously serviced) does not happen
- Higher immigration into UK than assumed here

# Key opportunities

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There are also a number of potential opportunities:

- Tourism presents opportunities through more 'staycations' if sterling remains low
- Scarcity of natural resources brings opportunity to local sectors – to agriculture, to renewable energy, or to 'near shore' manufacturing
- Care for elderly / aging population means 'silver dollar' could be a huge market
- Public sector transformation could provide further activities for the private sectors
- With a major telecommunications research centre opportunities for spin-outs could be higher

# Local risks and opportunities

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- **The risks for Suffolk Coastal look low compared to other areas**
  - Main employers are in utilities including ports and power generation which are stable necessities.
  - Exposure to public sector cuts is low, but some cuts will come
  - The BT Labs at Martlesham could be moved, for instance if BT were taken over, but this seems very unlikely for such a well established unit.
  - The local seaside resorts are in upmarket niches and look stable. The weak pound should help them
  - With a relatively large number of people working in Ipswich the town's economy will always have a influence on prosperity in Suffolk Coastal. With a diversified economic base and not too large a dependence on the public sector our forecast for Ipswich is reasonably favourable.

# Winner and losers over the decade ahead

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## ● Potential Losers

- Public sector workers
- Companies reliant on public sector business
- Especially if they are highly leveraged
- Retail & Leisure

## ● Potential Winners (might be relative)

- Exporting industries
  - Including manufacturing and parts of financial & business services
- Suppliers to exporting industries
- Ports, energy and telecommunications



# Understanding the localism bill and what it means?

## What is the 'localism bill'?

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- The decentralisation and localism bill announced in the Queen's Speech will devolve greater powers to councils and neighbourhoods and to give local communities more control over housing and planning decisions.
- The bill proposes to abolish Regional Spatial Strategies (RSS) and to make use of local enterprise partnerships (LEPs) brought forward by groups of local authorities to promote local economic development.
- The action to revoke all regional strategies was challenged but the decision on the 10<sup>th</sup> November concluded that all Regional Strategies could not be revoked in their entirety.
- The Coalition Government is expected to introduce the Localism Bill to Parliament later this month.

## More localism

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- The situation remains fluid, especially in Suffolk where the intention has been announced of outsourcing most public services
- The most important factor is whether RSS targets will be replaced in some form.
- If local pressures lead to less new building, we would expect house prices to rise to bring demand from potential in-movers into line with local supply of dwellings.

# Localism agenda – greater powers for Local Authorities

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## ● Positives

- People with local knowledge are involved in policy making
- Specific local conditions can be addressed which are often missed in a generic approach
- Greater community engagement with local people involved and engaged in planning, regeneration
- Local ownership of analysis

## ● Negatives

- Lack of strategic planning (no-one will want to plan for warehousing, social housing and other unattractive activities)
- Potentially disjointed approach to strategic policy making.
- Local political pressure could mean unrealistic plans with no co-ordination between areas
- Lack of economies of scale in research/ data collection activities (duplication of effort)

# Annex A – EEFM method data and capabilities

# Model overview

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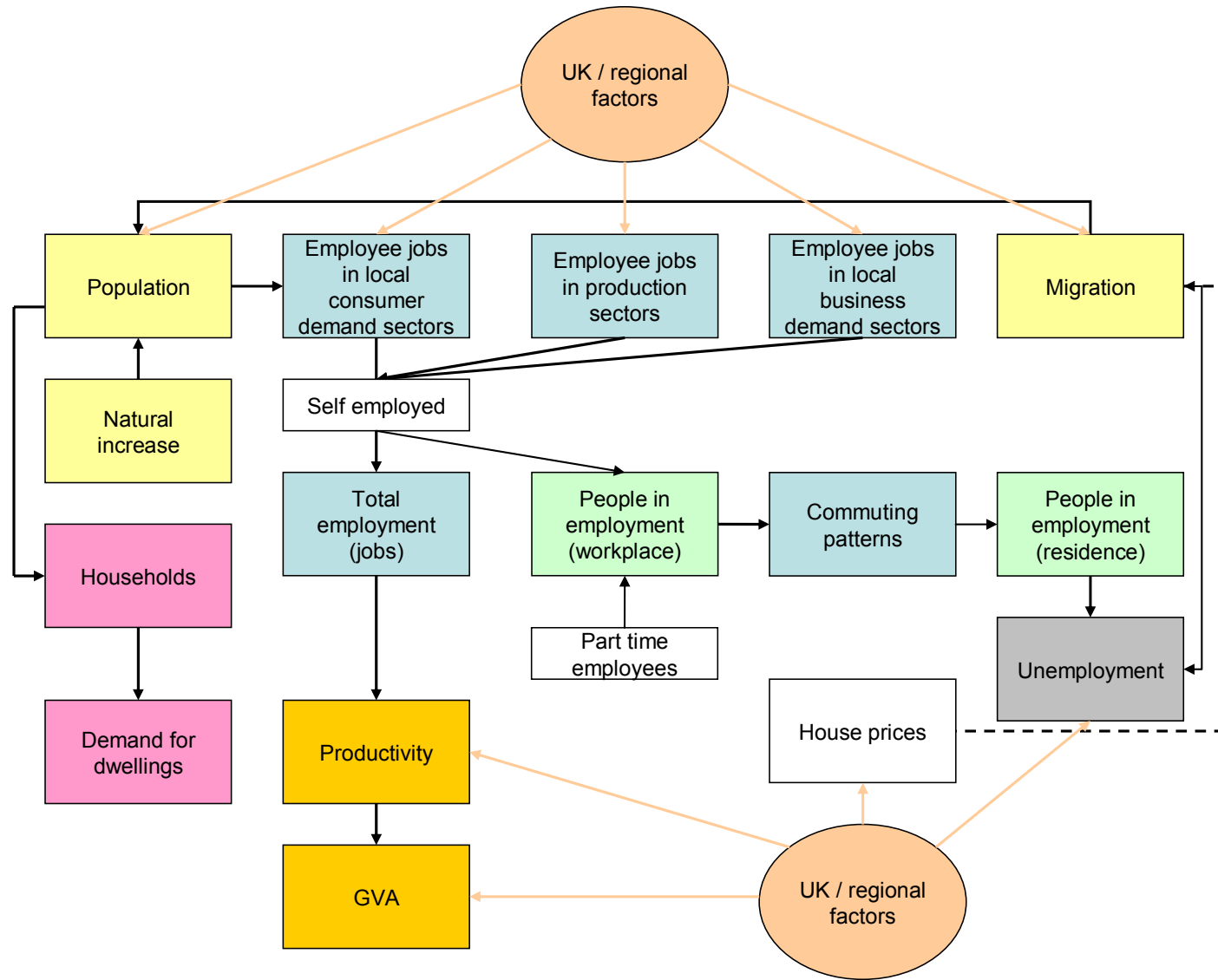
- The East of England Forecasting Model was originally designed as a standalone forecasting system to guide EEDA on 'baseline' (or 'business as usual') economic forecasts with their associated demographic and housing implications; and to allow EEDA to generate alternative scenarios showing what the economic outlook might look like if there was something significantly different in the region (for example, measuring the impact of a new policy initiative)
- The Model is very large, providing over 7,000 economic, demographic and housing indicators for the East of England and its constituent local authorities, each of which are linked to others in the model (see the model linkages slide to show the main relationships within the model). These forecasts will not necessarily be consistent with adopted policies (eg, housing targets) unless the scenario being tested is defined on that basis.
- The Model provides a link between housing and the economy. It has undergone several improvements and updates since its inception – for example, to address the complexity of household formation trends at a time of economic and migration change.

# Purposes and aims of the EEFM

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- The EEFM is designed to provide:
  - A consistent evidence base for the region, for use in strategies and policy development and for testing spatial linkages in economic, demographic and housing trends;
  - A set of 'baseline' or 'business as usual' forecasts for the region prepared by Oxford Economics;
  - A means of generating scenarios (alternative future trends);
  - A mechanism to raise awareness of new or overlooked issues and linkages which might impinge on the success of regional or local policies and strategies;
  - An information resource collating a wide range of data in a central location and in a consistent manner.

# Model linkages





# Data coverage

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- There is a technical report published alongside the main EEFM results on the Insight East website which contains a technical discussion of the methods used in the EEFM. Below is a brief summary of the data included in the EEFM:
- **Demography:**
  - Population – total, children, working age and elderly
  - Migration
  - Natural increase
- **Labour market:**
  - Employment by 28 sectors (total number of jobs – i.e. full time, part time and self employed jobs, workplace based)
  - Total people employed (workplace based)
  - Total people employed (residence based)
  - Resident employment rate
  - Unemployment (claimant count, level and rate)
  - Commuting
- **Output:**
  - GVA and productivity
- **Housing:**
  - Dwelling stock
  - Households
- **Environment:**
  - CO2 emissions

# Annex B – Key data sources and links

# Data sources

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- Much of the data shown in this report comes from the East of England Forecasting Model which in itself comes from a wide range of data sources including the Office for National Statistics (ONS) and Department for Communities and Local Government (CLG).
- Below is a list of the key data and sources where applicable
- **Employee jobs:**
  - Regional employee jobs from the ONS Workforce Jobs series but cannot be downloaded online. This dataset is sent my email to Oxford Economics by the ONS
  - Local employee jobs from the Annual Business Inquiry (ABI). Can be downloaded from Nomis ([www.nomisweb.com](http://www.nomisweb.com)) however only users with Chancellor of the Exchequer's notice can access the data. The Chancellor of the Exchequer's notice is a legal document purchased by Oxford Economics which allows them to access potentially disclosive data from the ABI.
- **Self employment:**
  - Mostly estimated but done using regional data from the Labour Force Survey (LFS) which is sent to Oxford via email, local employee jobs data (from the ABI) and Census data which is downloadable from Nomis ([www.nomisweb.com](http://www.nomisweb.com)) or the ONS (<http://www.ons.gov.uk/census/index.html>)
- **Resident based employment**
  - Regional and local data available from the Annual Population Survey (APS) which is a 4 quarter average of LFS data. Can be downloaded from nomis ([www.nomisweb.com](http://www.nomisweb.com))

# Data sources cont'd

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- **Unemployment:**

- Claimant unemployed available for download from Nomis ([www.nomisweb.com](http://www.nomisweb.com))

- **Population:**

- Population data used in the EEFM comes from the ONS mid-year estimates. This data is available for download from the main ONS website, however it is also available on Nomis ([www.nomisweb.com](http://www.nomisweb.com))
- All components of change data (migration, natural increase) is available from the supporting information for local authorities mid-year population estimates tables (<http://www.statistics.gov.uk/STATBASE/Product.asp?vlnk=14060>)

- **Official population projections:**

- Latest projections are 2008 based. UK projections are available from the ONS (<http://www.statistics.gov.uk/StatBase/Product.asp?vlnk=8519>)
- Sub-national projections including the East and Suffolk Coastal are also available from the ONS (<http://www.statistics.gov.uk/statbase/Product.asp?vlnk=997>)

- **Gross Value Added (GVA):**

- National data published by the ONS in its Quarterly National Accounts (<http://www.statistics.gov.uk/StatBase/Product.asp?vlnk=818&Pos=&ColRank=1&Rank=422>)
- or the Blue Book which is a set of annual National Accounts and can also be downloaded from the ONS (<http://www.statistics.gov.uk/StatBase/Product.asp?vlnk=1143&Pos=&ColRank=1&Rank=272>)
- Regional and more localised data is published in UK Regional Accounts from the ONS (<http://www.statistics.gov.uk/statbase/Product.asp?vlnk=14650>)

# Data sources cont'd

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- **Dwelling Stock:**

- Download from the Housing Strategy Statistical Appendix from the Department for Communities and Local Government, DCLG  
(<http://www.communities.gov.uk/housing/housingresearch/housingstatistics/housingstatisticsby/localauthorityhousing/dataforms/hssa/>)

- **Official household projections:**

- Official household projections used in the Autumn EEFM are 2006 based and can be downloaded from DCLG (note that 2008 based projections were published on 26<sup>th</sup> November and after the data cut-off point for the EEFM)  
(<http://www.communities.gov.uk/housing/housingresearch/housingstatistics/housingstatisticsby/householdestimates/livetables-households/>)

- **ALL OF THE DATA AND FORECASTS PRESENTED IN THIS REPORT CAN BE DOWNLOADED IN ONE SINGLE SPREADSHEET FROM THE INSIGHT EAST WEBSITE WHICH HOSTS THE EAST OF ENGLAND FORECASTING MODEL REPORTS WHERE MORE DETAIL ON DATA SOURCES, CAVEATS AND METHODOLOGY CAN BE FOUND IN THE TECHNICAL REPORT**

<http://insighteast.org/viewArticle.aspx?id=17083>