March 2019

Norwich Economic Barometer

NORWICH
City Council

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Business news

Economy

- UK inflation fell to a two-year low in January, dragged lower by falling energy bills and fuel. The Office for National Statistics (ONS) reported the Consumer Prices Index (CPI) was 1.8 per cent in January, from 2.1 per cent in December. January's fall, partly offset by higher air and ferry fares, was bigger than economists' forecasts and comes as latest data shows wages rising by 3.3 per cent. Inflation peaked at a five-year high of 3.1 per cent in November 2017 and was last at 1.8 per cent was in January 2017. Economists had forecast that CPI would fall in January to 2 per cent, the Bank of England's inflation target. The fall in inflation is due mainly to cheaper energy and petrol, partly offset by rising ferry ticket prices and air fares falling more slowly than this time last year. Ofgem's energy price cap, which came into effect from 1 January 2019, helped drive down inflation, the ONS said. However, that cap is being raised and this is likely to feed into future CPI figures.
- The number of homes repossessed in the UK fell to its lowest level since 1980 last year, industry figures show. Around 4,580 homes were repossessed by mortgage lenders from owners who were unable to keep up with repayments on their home loans. Low mortgage rates and a less aggressive attitude from lenders has meant low levels of repossession in recent years. Mortgage arrears among homeowners have also been falling. The figures from UK Finance, which represents lenders, showed that the number of landlords falling behind on mortgage repayments was unchanged in the final quarter of last year compared with the same three months in 2017. However, within this group, there was a 7 per cent rise in buy-to-let mortgage holders with significant levels of arrears, defined as 10 per cent or more of the outstanding mortgage.
- Visa’s UK Consumer Spending Index, compiled by IHS Markit, pointed to a weak start to 2019, with expenditure falling for the fourth month running. Moreover, household spending was down by 1.3 per cent year-on-year in January (-0.9 per cent in December) signalling the most marked fall since April 2018. A further decline in spending on the high street drove the latest fall in overall household expenditure. Face-to-face spending fell by 1.5 per cent year-on-year, following a 1.6 per cent reduction in December. eCommerce spending also dipped into contractionary territory, however, ending a three-month sequence of growth. Expenditure was down 0.2 per cent on an annual basis. Half of the eight broad sectors covered saw spending decrease in January. The sharpest reduction was again in the Transport & Communication category, where expenditure fell by 4.7 per cent year-on-year. Solid reductions were also seen in Clothing & Footwear and Recreation & Culture. However, Food & Drink recorded a return to growth in

January, with spending rising 1.7 per cent year-on-year. Hotels, Restaurants & Bars and Household Goods meanwhile eked out marginal expansions.

- February saw manufacturers continue to implement plans to mitigate potential Brexit-related disruptions. Purchasing activity was scaled-up to stockpile raw materials, leading to a survey-record expansion in input inventories. The uncertain outlook also impacted on business optimism and employment, with confidence at a series-record low and the rate of job losses hitting a six-year high. The IHS Markit/CIPS Purchasing Managers' Index® (PMI®) fell to a four-month low of 52.0 in February, down from a revised reading of 52.6 in January (originally reported as 52.8). The PMI is currently at its second-lowest level since July 2016 – the month following the EU referendum. Although the trend in manufacturing output improved slightly in February, this mainly reflected efforts to reduce backlogs of work and build stocks of finished products in advance of Brexit. Growth of new order inflows eased to near-stagnation, amid signs of a slowing domestic market and a further drop in new export orders. Companies linked lower overseas demand to weaker global economic growth, especially in Europe. Manufacturers' optimism regarding future output fell to its lowest level in the series history in February. Positive sentiment was either at, or near to, record lows across the consumer, intermediate and investment goods sectors.

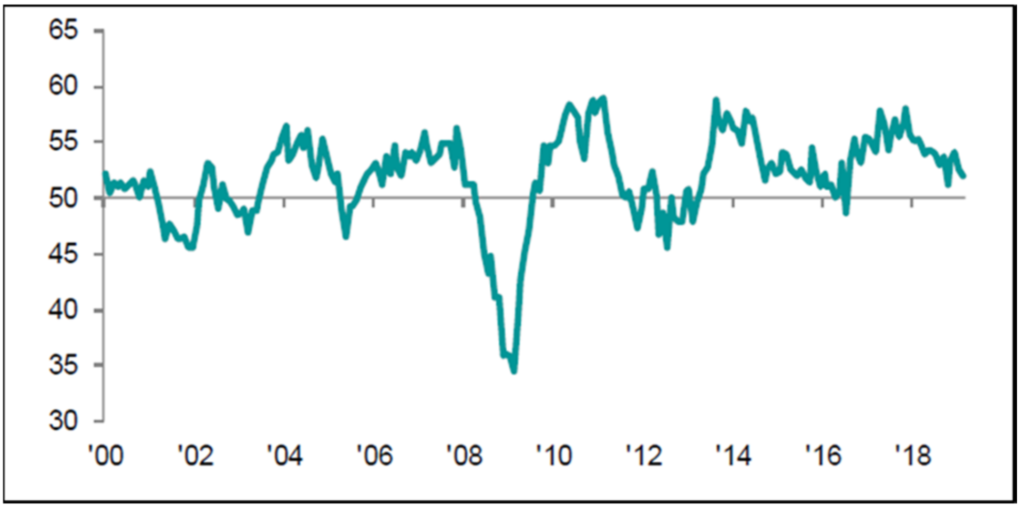

Figure 1 IHS Markit/CIPS Purchasing Managers' Index Manufacturing

- UK construction companies indicated that business activity levels fell during February, which ended a ten-month period of sustained expansion. The drop in construction work was led by reductions in commercial building and civil engineering activity. A soft patch for new orders so far in 2019 meant that job creation remained subdued in February. Survey respondents often cited concerns about a lack of new projects to replace completed contracts. At 49.5 in February, down from 50.6 in January, the headline seasonally adjusted IHS Markit/CIPS UK Construction Total Activity Index registered below the 50.0 no-change threshold for the first time since the snow disruptions seen in March

2018. Aside from this brief weather-related decline in output, the latest reading was the lowest since September 2017. Residential work was the best performing area of construction activity in February, with growth recorded for the thirteenth month running. However, the rate of expansion was only modest and therefore could not offset the declines recorded for commercial and civil engineering activity. In both cases, the pace of contraction was the steepest since March 2018.

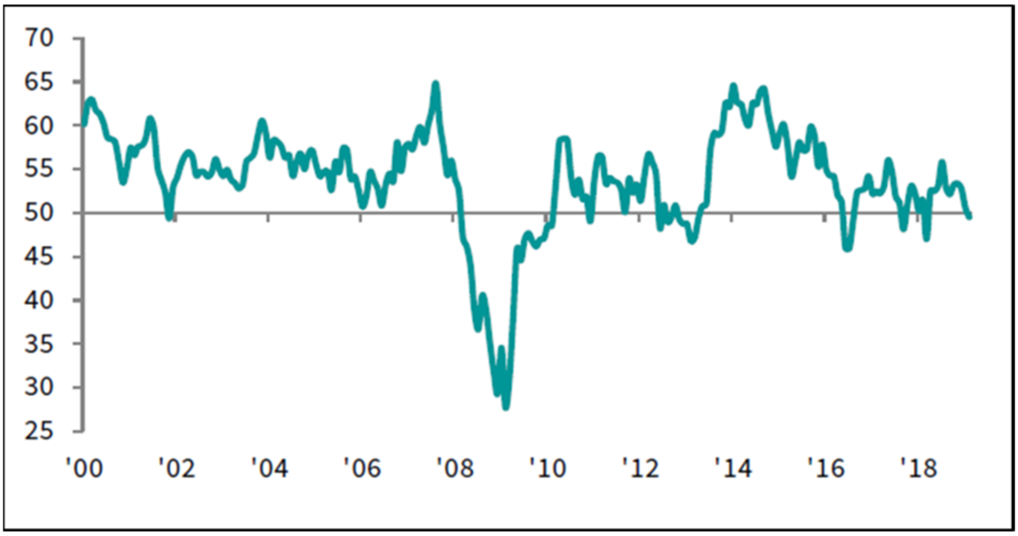

Figure 2 IHS Markit/CIPS Purchasing Managers' Index Construction

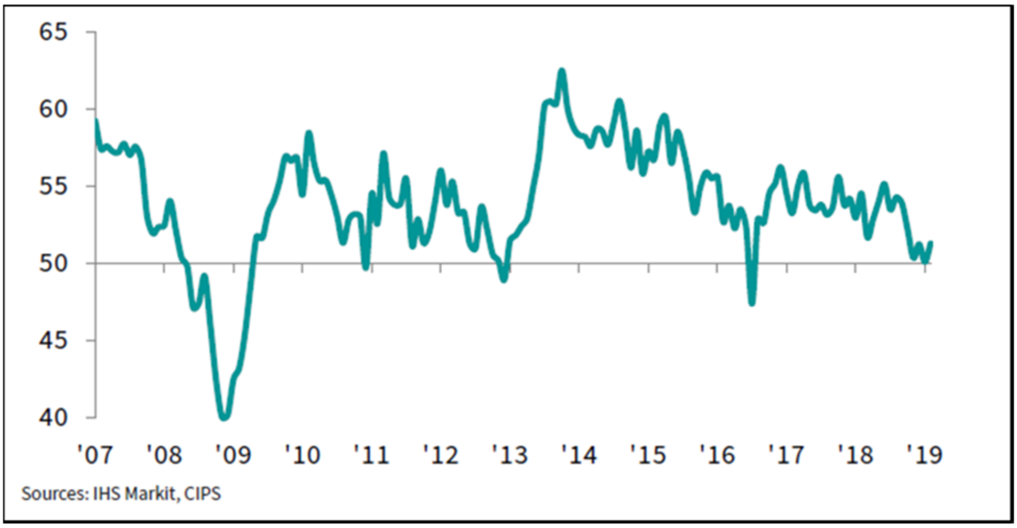

Figure 3 IHS Markit/CIPS UK Services PMI Business Activity Index

- UK service providers indicated that the subdued start to the year continued into February, with business activity expanding only marginally and incoming new work falling for the second month in a row. Moreover, employment numbers declined at the fastest pace for over seven years as businesses opted to delay staff hiring in response to subdued demand and concerns about the near-term economic outlook. The main positive development in February was a slowdown in input cost inflation to its weakest since May 2018. The headline seasonally adjusted IHS Markit/CIPS UK Services PMI® Business Activity Index registered 51.3 in February, up from a two-and-a-half year low of 50.1 in January. Brexit-related uncertainty remained by far the most prominent factor acting as a brake on business activity growth in February. There were widespread reports that political uncertainty had encouraged delays to corporate spending decisions and a general rise in risk aversion among clients.

- Business hiring intentions in the East of England jumped in February and confidence held steady in the region, according to a business barometer from Lloyds Bank Commercial Banking. The survey showed hiring intentions rose by 16 points, with a net balance of eight per cent of businesses in the region now expecting to recruit more staff during the next year. Firms in the region reported a slight drop in confidence in their own business prospects at 15 per cent, down from 17 per cent in January. But together with their views on the economy it left overall confidence unchanged at six per cent. Nationally, overall confidence fell by 15 points to four per cent.

- A significant number of businesses in the region are struggling to pay their debts by their due date and are renegotiating payment terms although overall signs of distress amongst East of England companies fell over 2018. New research from the Eastern branch of R3 showed that around 13 per cent of companies in the region are struggling to pay debts by their due date and the same share is renegotiating payment terms with creditors. Meanwhile, 6 per cent of local businesses say they would be unable to pay their debts if interest rates were to increase by a small amount whilst seven per cent are just paying the interest on their debts. However the number of businesses seeing at least one signs of distress has fallen to 48 per cent from 58 per cent in April 2018. R3 Eastern forecasts a mixed year ahead for businesses in the region, particularly those which are struggling and are only paying off interest on their debts and not the debt itself.

- SMEs in the East Anglia region remain optimistic and confident about future growth, despite the uncertainty surrounding Brexit, rising production costs and skill shortages, according to the latest MHA manufacturing and engineering report. All the respondents in East Anglia were SMEs with less than 250 employees with a turnover of less than £20 million, operating in a wide range of sub-sectors. Optimism is high with over 73 per cent of SME businesses in East Anglia expecting revenue growth in the next 12 months. Investment in R&D is also high but surprisingly 36 per cent of respondents will not be making a claim for R&D tax credits in the next 12 months.

- The East of England economy is facing heavy costs in the event of a ‘no deal’ Brexit due to the collapse of international trade deals and from tariffs, the CBI has warned. It says East of England exports to countries with EU free trade agreements are worth more than £4 billion and account for more than 10 per cent of the region’s exports every year. Firms in the region exports goods worth £570m to Turkey and £350m to Canada each year through the agreements with the machinery/transport and chemicals/pharmaceuticals sectors among the most exposed. The CBI reported that immediate tariffs could cost the region’s economy millions in lost orders.

- The number of active businesses across the East of England increased by over 9,000 to 351,000 in the year to January 2019 although the number of firms in the region with an increased risk of insolvency grew by over 33,000 over the same time period, says a report from the Eastern branch of R3. The share of companies at an ‘elevated risk of insolvency rose to 45 per cent in January from 36.5 per cent a year earlier. Firms involved in manufacturing, construction, tourism, restaurants, pubs, hotels, professional services, transport and haulage and retail, carried a higher risk of insolvency
- Business hiring intentions in the East of England jumped in February and confidence held steady in the region, according to a business barometer from Lloyds Bank Commercial Banking. The survey showed hiring intentions rose by 16 points, with a net balance of eight per cent of businesses in the region now expecting to recruit more staff during the next year. Firms in the region reported a slight drop in confidence in their own business prospects at 15 per cent, down from 17 per cent in January. But together with their views on the economy it left overall confidence unchanged at six per cent. Nationally, overall confidence fell by 15 points to four per cent.
- Private sector business activity picked up in the region in February although firms' expectations for output over the coming year remained subdued as workforces shrank for the second month running, according to a key survey of purchasing managers. The NatWest East of England business activity index rose from 50.0 in January to 52.4 in February, the sharpest rise in four months, although still below the long-term growth level. Firms in the region saw higher intakes of new business in February and the volume of outstanding work held by private sector firms continued to decline. But jobs were being shed at the fastest rate since September 2012. Input price inflation slowed for the fourth month running but remained strong and output price inflation also eased. The survey said companies remained optimistic regarding output expectations over the next 12 months, but sentiment remained at January's weak level.

Local Business

- Train operator Greater Anglia is introducing four extra services between Norwich, Ipswich and London Liverpool Street to speed up travel. Fastest journey times between Norwich and London will be cut to 90 minutes, while it will take just 55 to 57 minutes to travel between Ipswich and London on the extra services. The first of the faster services are due to come into service on Monday, May 20.

- Construction firm R G Carter has announced it will be recruiting up to 40 craft and management apprentices over the next six months, in a bid to create the next generation of construction professionals and tradesmen. The Norwich-based firm already employs nearly 100 apprentices and hopes to recruit their new cohort in the summer.
- A new home furnishings store has opened in Norwich's Royal Arcade. The Bedlinen Co. opened its first store in the city, having only signed a license last month. Owner and director Joanne Cannon has worked in the soft furnishings industry for 25 years, and decided to launch her own company last year. She invested around £45,000 into the venture for purchasing stock and refurbishing the premises.
- Berry's and Grey home interiors store has announced its Norwich store in the Royal Arcade is to close. The owners stated that the closure is a business decision, vital to the evolution of the brand which now makes the vast majority of its sales online.
- Norwich is now officially the UK's first sharing city, following a launch event of an initiative which encourages people and businesses to help each other for the common good. The city joins cities such as New York, Barcelona, Athens and Dallas in securing the status. The idea is that groups across the Norwich work together, passing on knowledge and expertise to help boost grassroots campaigns and grow businesses. The not-for-profit Norwich Sharing City campaign was launched in 2017 by Flibl, a content and communications agency. The campaign has since grown, with support from Norwich Business Improvement District.
- A new dessert retailer will be coming to Norwich - Delightful Desserts is moving into Castle Mall. The outlet will sell a selection of ice creams, gelatos, waffles, crepes, cookie doughs, milkshakes and sundaes. It will open in April on the second floor of Castle Mall, ahead of the launch of a new bowling alley next door later in the summer.
- Epic Studios in Norwich have had a state-of-the-art Martin Audio MLA PA system installed - the fourth of it's kind in the UK. This quarter million-pound investment, will allow artists to play to larger audiences without a detriment to sound quality. The owner of Epic Studios ambition is to increase capacity and install state-of-the-art facilities to cement the Studio's reputation as a world-class small arena and the best in East Anglia.
- A new government and industry Offshore Wind Sector Deal which involves a central role for East Anglia in plans to invest £250 million has been announced. It aims to boost the share of British electricity produced from offshore power to a third by 2030. Meanwhile, a new Offshore Wind Growth Partnership will be set up to develop the UK supply chain to take advantage of a predicted five-fold

increase in global exports in the sector to £2.6 billion and a tripling in the number of jobs to 27,000 by 2030. It also aims to boost the UK content in home offshore wind projects to ensure companies in areas such as East Anglia, Humber and the North East are competitive and international leaders in the sector.

- An ambitious programme to help promising businesses with high growth potential in Suffolk and Norfolk accelerate their pace of expansion has been launched by New Anglia LEP and delivered through the New Anglia Growth Hub. Opening with an event focused on digital businesses in Newmarket in February, and a further manufacuring themed event in Norfolk in March; the 'Scale Up New Anglia' Programme will run over three years with a stated aim to help 'silver' companies in the two counties - companies with a propensity to grow. They fall between 'bronze' (start-ups) and 'gold' (scale-ups), defined as growing in terms of turnover or full time employees at 20 per cent p.a. or more, over a three year period.
- A Norwich restaurant has been saved from closure by four regular customers who stepped in to buy the business. The Last Wine Bar and Restaurant on St George's Street was purchased by the four investors on the eve of the company's 29th anniversary. The restaurant's founder, James Sawrey-Cookson, is now retiring from the business. The Last Wine Bar and Restaurant was founded in a former shoe factory on St George's Street in Norwich in April 1990. It employs around 20 people.
- Fika, a coffee shop with a Swedish focus is opening in the city centre. on Wensum Street, in the former home of Artel and The Window Coffee Shop. It will be run by Norwich-born and bred Mark Lawrence, who embarked on the venture after a major change in direction.
- Construction firm Kier has found a huge hole in its finances — revealing a further £40.2m of debt than previously thought. Kier has been forced to restate its debt position, which was reported at the end of 2018 at £130m, but has now been revised to £180.5m. The firm has two hubs in Norfolk, one in Norwich at Mile Cross Lane and one in Aylsham. The Kier Group said that the debt had been unearthed following an "accounting error related to property assets". The average month-end debt position for the six months ended December 31 was also increased to about £430 million from £370 million. Following the announcement, shares crashed over 13 per cent in morning trade to 431p. Kier said it remains focused on reducing its debt and expects that it will be in a cash position by June 30.
- Giraffe, at intu Chapelfield in Norwich, has been earmarked for closure by its owners. The fate of other Giraffe outlets in Bury St Edmunds and Chelmsford is unknown. The Norwich Giraffe, which is owned Boparan Restaurant Group (BRG), is one of 27 restaurants earmarked for closure, including some Ed's Easy

Diners, which BRG also owns. The closures will be bought about by a company voluntary arrangement (CVA).

- A new cafe serving east Asian delicacies, Moya Bubble Tea, will be opening in Castle Mall next month, on level two beside The Java Store. In addition to experimenting with bubble tea, the store will also sell Japanese bakery goods including buns, cheesecakes, green tea cakes and dorayaki – pancakes with sweet fillings.
- Employees at a fundraising firm with an office in Norwich have been made redundant following the company's collapse. HOME Fundraising Ltd went into administration on March 1 after more than 16 years of trading on behalf of charities across the UK. The company, which had an office at St Vedast Street in Norwich, said 600 employees were entered into a redundancy consultation, locally 30 employees have lost their jobs.
- The gift shop Quest Norwich on Exchange Street closed at the end of February, after three and a half years of trading. Other Quest gift shops in Bury St Edmunds and Holt remain open.
- A tattoo artist has been given the go-ahead to open a new studio in the heart of Norwich's late night entertainment area. William Sparling, whose business is Crow Temple Tattoo Ltd, has been given permission to use the first and second floors of a building on Prince of Wales Road as a tattoo parlour. The application to Norwich City Council did not specify the opening hours of the business or whether he intend to employ additional staff or to continue running the studio as a one-man operation.

Claimant count unemployment

The “claimant count” measure counts the number of people claiming Jobseeker's Allowance plus those who claim Universal Credit[i] and are required to seek work and be available for work and replaces the number of people claiming Jobseeker's Allowance as the headline indicator of the number of people claiming benefits principally for the reason of being unemployed. Figure 4 demonstrates the trend in claimant count unemployment since 2015. Rates have fallen noticeably since the beginning of the period. In 2015 the rate in the Norwich City Council area stood significantly above the other reported areas, but in the past year the gap has narrowed and has fallen rapidly below the national rate.

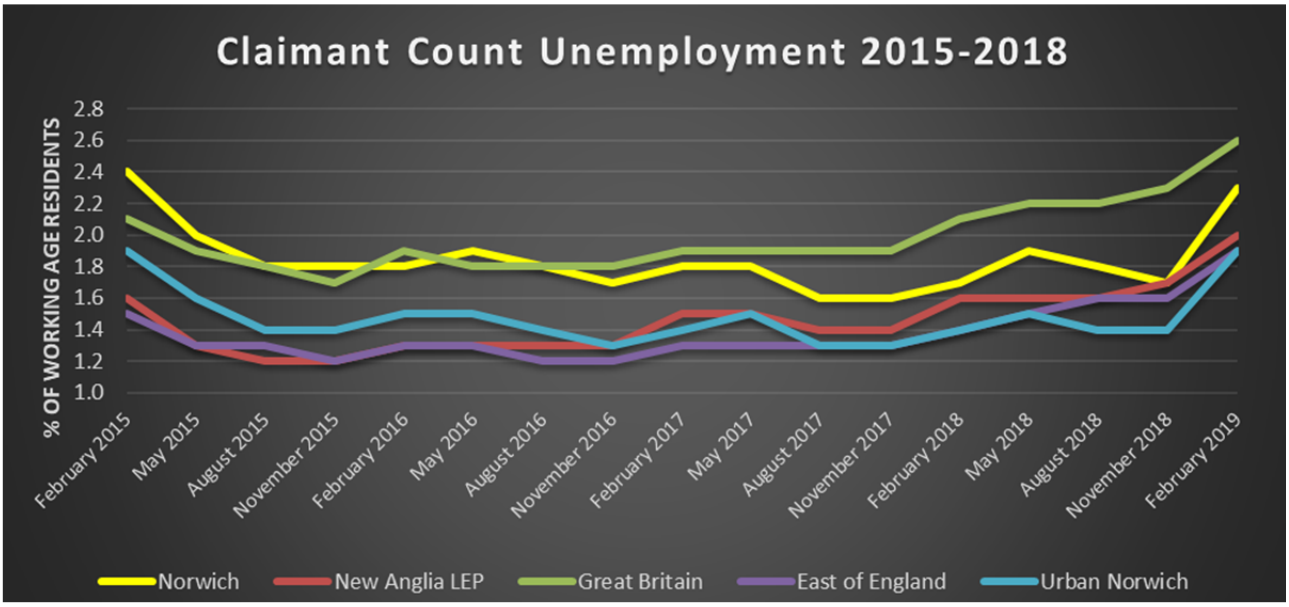

Figure 4 Claimant count unemployment 2014 to 2018

Table 1	**Claimant count rate unemployment**							
	February 2018		**January 2019**		**February 2019**		**Monthly change**	**Annual change**
Great Britain	835,810	1.7%	974,305	2.1%	1,039,010	2.3%	+ 0.1%	+ 0.6%
East of England	54,665	1.6%	66,200	1.8%	71,660	2.0%	+ 0.2%	+ 0.4%
New Anglia LEP	15,710	2.1%	17,975	2.4%	19,415	2.6%	+ 0.2%	+ 0.5%
Norwich City Council[ii]	1,665	1.4%	2,015	1.8%	2,185	1.9%	+ 0.1%	+ 0.5%
Norwich urban[iii]	2,080	1.4%	2,470	1.7%	2,710	1.9%	+ 0.2%	+0.5%

Table 1 shows that the each of the areas saw an increase in claimant count unemployment rates over the year. Over the month, unemployment rates grew markedly across each of the areas.

Ward level Claimant count unemployment

Table 2	Claimant count unemployment							
	February 2018		January 2019		February 2019		Monthly change	Annual change
Bowthorpe	140	1.7%	170	2.0%	180	2.2%	+ 0.2%	+ 0.5%
Catton Grove	165	2.3%	180	2.5%	205	2.8%	+ 0.3%	+ 0.5%
Crome	120	2.0%	140	2.4%	160	2.7%	+ 0.3%	+ 0.7%
Eaton	20	0.4%	40	0.8%	45	0.9%	+ 0.1%	0
Lakenham	110	1.9%	130	2.3%	140	2.4%	+ 0.1%	+ 0.5%
Mancroft	260	3.4%	325	4.3%	355	4.7%	+ 0.4%	+ 1.3%
Mile Cross	195	2.7%	225	3.2%	240	3.3%	+ 0.1%	+ 0.6%
Nelson	55	0.8%	40	0.6%	45	0.7%	+ 0.1%	- 0.1%
Sewell	115	1.6%	140	2.0%	155	2.2%	+ 0.2%	+ 0.6%
Thorpe Hamlet	190	2.1%	225	2.5%	245	2.7%	+ 0.2%	+ 0.6%
Town Close	85	1.1%	125	1.6%	140	1.8%	+ 0.2%	+ 0.7%
University	65	0.7%	80	0.8%	80	0.8%	0	+ 0.1%
Wensum	150	1.8%	190	2.3%	195	2.4%	+ 0.1%	+ 0.6%

Compared to January, unemployment rates grew slightly across each ward except University where rates remained unchanged.

Over the year, rates were unchanged in Eaton ward and Nelson ward saw a marginal fall; rates increased in every other Norwich ward.

On the next page, Figure 5 demonstrates the wide variation in ward JSA rates across the city council area. The differential between the lowest (Nelson) and the highest (Mancroft) rates currently stands at 4 percentage points.

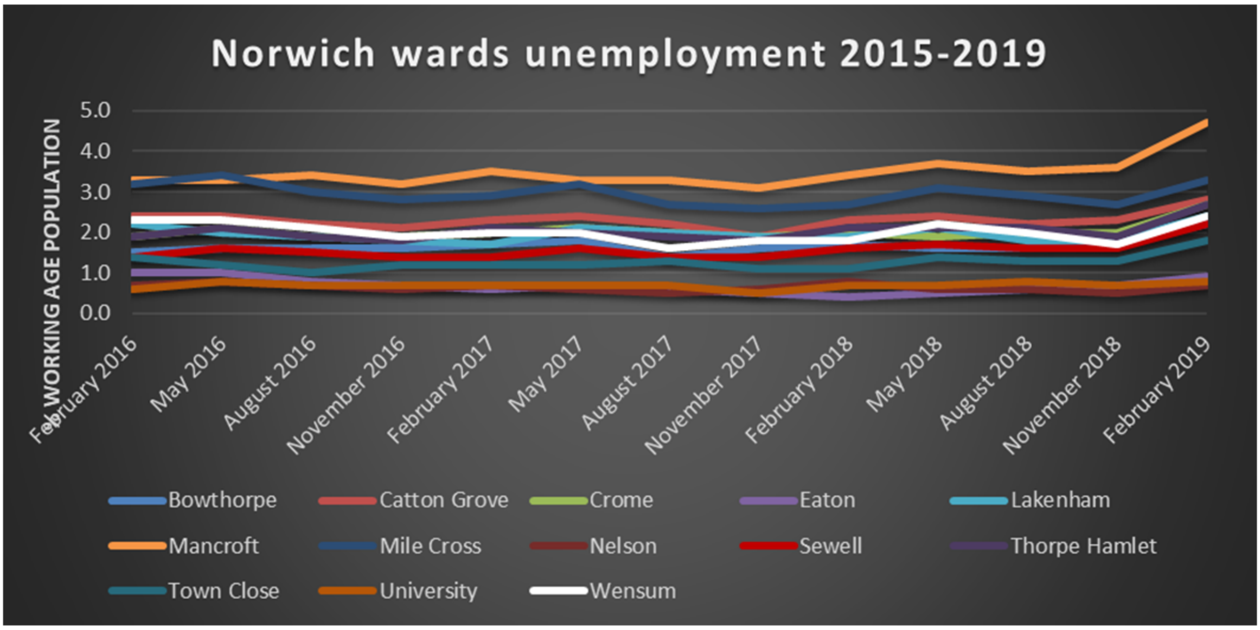

Figure 5 **Norwich wards claimant count unemployment 2015 to 2019**

Claimant count unemployment: age/duration

Gender: in the city council area, slightly more than one in every three (35 per cent) out-of-work claimants is a woman. Over the month, female rates increased across the Norwich area (1.6 per cent) and regionally (1.6 per cent); the LEP area (x1.6 per cent) and nationally (2.2 per cent).

The male unemployment rate is higher nationally and in Norwich (at 3.1 per cent and 2.9 per cent of working age males respectively) than in the LEP area (2.3 per cent) or regionally (2.2 per cent). Over the month, rates increased across each of the reported areas.

Norwich's male unemployment rate has remained higher than rates in the LEP area and at the regional and national levels since records began in 1992. However, the current male claimant count rate in Norwich is one of the lowest ever recorded and is now below the national rate.

It is likely that Norwich's relatively high levels of male unemployment can be attributed to the steady loss of manufacturing jobs and the dominance of the service sector in Norwich.

Duration: a level of churn takes place within the labour market as people move between unemployment, welfare benefits and employment. In Norwich 27.1 per cent of JSA[iv] unemployment claims are for a period of less than six months; higher than the proportion seen across the LEP area (31.5 per cent, nationally (25.3 per cent) and regionally (32.7 per cent).

The percentage of JSA claimants who are recorded as being unemployed for more than 12 months stands at 42.4 per cent in Norwich compared to 48.4 per cent in the LEP area; 48.2 per cent regionally and 56.2 per cent nationally. Relative to the previous month, the percentage of long-term unemployed increased across each of the reported areas.

It is widely recognised that long periods of unemployment make it increasingly difficult for affected individuals to find work, particularly in a weak labour market. Over the year, the number of people recorded as long term unemployed in Norwich has grown from 300 people in February 2018 to 345 currently.

Age: In Norwich, 11.1% of JSA unemployed people are aged 18-24 year old; across the LEP area the proportion stands at 8.6 per cent; 8.3 per cent nationally and 8.1 per cent regionally.

At the other end of the age scale, Norwich has a lower proportion of JSA unemployment claimants aged 50 years and older (32.7 per cent) compared to the LEP area (40.3 per cent) and regionally (40.1 per cent) and nationally (38.3 per cent).

Housing benefit

Housing benefit is an income related benefit designed to help people on low incomes pay for rented accommodation whether in, or out, of work.

Many housing benefit claimants are pensioners, people with disabilities, carers or people who are in low waged work. It should be noted that resident earnings in Norwich are relatively low and this will be a contributing factor to the number of people claiming housing benefit.

Table 3 Norwich City Council housing benefit[v] claimants

	Number of claimants	Monthly change
February 2018	16,222	+ 32 (+ 0.2%)
March 2018	16,246	+ 24 (+ 0.1%)
April 2018	16,183	- 63 (- 0.4%)
May 2018	16,170	- 13 (0.03%)
June 2018	16,176	+ 6 (+ 0.03%)
July 2018	16,188	+ 12 (+ 0.03%)
August 2018	16,180	- 8 (- 0.04%)
September 2018	16,092	- 88 (- 0.5%)
October 2018	16,076	- 16 (- 0.09%)
November 2018	16,060	- 16 (- 0.09%)
December 2018	15,949	- 111 (- 0.7%)
January 2019	15,703	- 246 (- 1.5%)
February 2019	15,651	- 52 (- 0.3%)

Table 3 shows that the number of housing benefit claimants in the Norwich local authority area fell by 52 claims during February. Over the year, housing benefit claims in Norwich have fallen by 3.5 per cent. Comparable national data is not available because of a time lag in data collection.

Average house prices

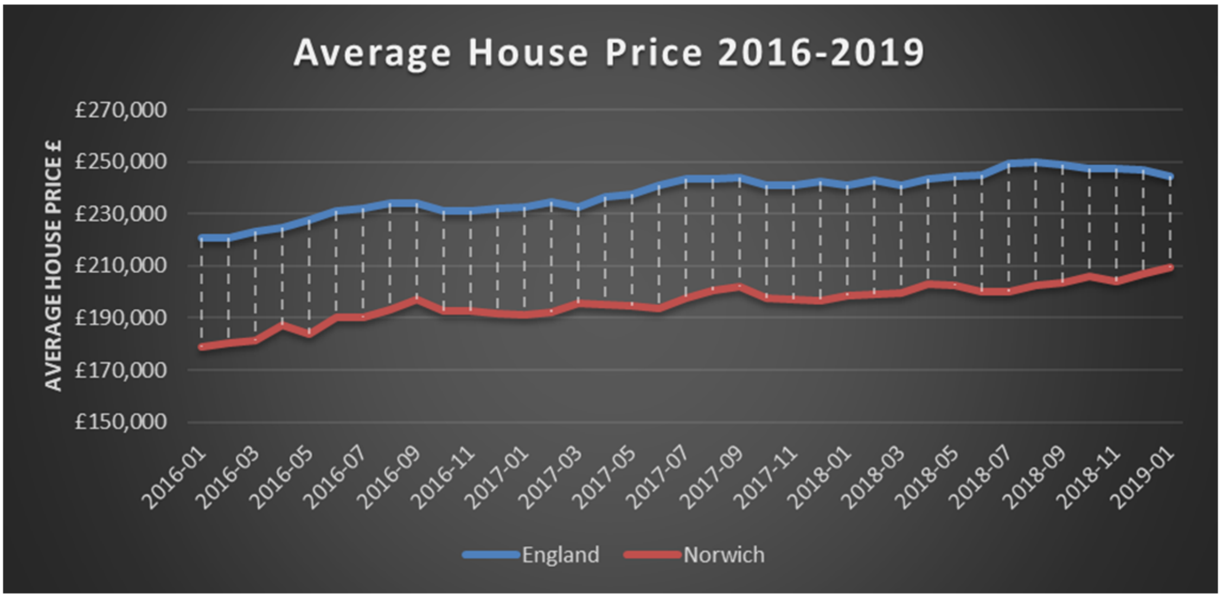

Figure 6 HM Land Registry average house prices 2016-19

The House Price Index produced by HM Land Registry is the most accurate and independent house price index available for England. According to HM Land Registry's House Price Index (Crown copyright) over the year, average house prices increased by 5.11 per cent in Norwich and 1.45 per cent across England. Figure 6 summarises average house price movements since January 2016.

During the month of January, average house prices increased by 1.04 per cent in Norwich conversely the price fell by 1.02 per cent in England compared to the previous month. The average house price in Norwich currently stands at £209,244 against £244,567 for England.

Appendix

Contact details

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Data Sources:

Figure 1: IHS Markit/CIPS UK Manufacturing PMI

Figure 2: IHS Markit/CIPS UK Construction PMI

Figure 3: IHS Markit / CIPS UK Services PMI

Figure 4: Claimant count – NOMIS, Crown copyright

Figure 5: Ward unemployment – NOMIS, Crown copyright

Figure 6: House Price Index, HM Land Registry, Crown copyright

Tables 1 and 2: Claimant count – NOMIS, Crown copyright

Table 3: Housing benefit claimants - Norwich City Council

News stories from a variety of sources including EDP/Evening News; Business in East Anglia; Office of National Statistics; Reuters; BBC; Markit/CIPS PMI; Markit Monthly Economic Overview: University of East Anglia; Norwich University of the Arts; City College Norwich.

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[i] Under Universal Credit a broader span of claimants are required to look for work than under Jobseeker's Allowance. As Universal Credit Full Service is rolled out in particular areas, the number of people recorded as being on the Claimant Count is therefore likely to rise.

ii The Norwich City council area comprises the following wards: Bowthorpe, Catton Grove, Crome, Eaton, Lakenham, Mancroft, Mile Cross, Nelson, Sewell, Thorpe Hamlet, Town Close, University, Wensum

iii The Norwich urban area comprises the following wards: Drayton North, Drayton South, Hellesdon North West, Hellesdon South East, Old Catton and Sprowston West, Sprowston Central, Sprowston East, Taverham North, Taverham South, Thorpe St Andrew North West, Thorpe St Andrew South East, Bowthorpe, Catton Grove, Crome, Eaton, Lakenham, Mancroft, Mile Cross, Nelson, Sewell, Thorpe Hamlet, Town Close, University, Wensum, Cringleford, New Costessey, Old Costessey,

iv Claimant count data not yet available by age/duration

v Housing benefit numbers include people who are claiming council tax benefit only

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