



February 2024

Norwich Economic Barometer



NORWICH
City Council

Norwich Economic Barometer – February 2024

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Business news

Economy

- January data signalled a solid increase in business activity across the UK service economy, which extended the current period of expansion to three months. Higher levels of output were supported by a sustained rise in new orders. Survey respondents typically commented on improved confidence among clients due to strengthening economic conditions expected interest rate cuts. Service providers noted that strong wage pressures continued to push up operating expenses, although these were partly offset by lower fuel costs and raw material prices. Measured overall, the rate of input cost inflation matched its level recorded last October and was therefore the joint-lowest for nearly three years. This contributed to the slowest rise in prices charged by service sector firms since last September. Figure 1 shows the seasonally adjusted final S&P Global UK Services PMI Business Activity Index registered 54.3 in January, up from 53.4 in December and above the crucial 50.0 value for the third successive month and signalled the fastest rate of business activity growth since May 2023. This was linked to more favourable economic conditions combined with rising business and consumer sentiment at the start of the year. However, some firms still noted a drag on household demand from cost-of-living pressures. Total new work increased for the third consecutive month in January and at the steepest pace since May 2023.

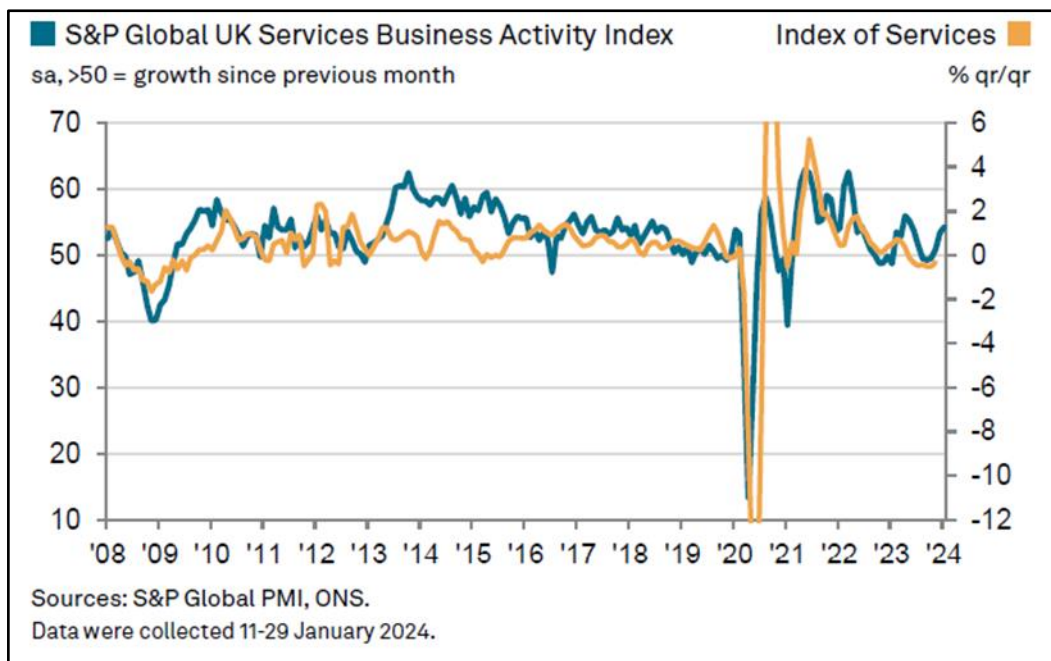


Figure 1: S&P Global/CIPS UK Services Business Activity Index

- The downturn in the UK manufacturing sector continued at the start of 2024. January saw output and new orders decline further, leading to additional job losses and

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cutbacks in purchasing and stock holdings. Manufacturers also experienced rising supply chain difficulties, as the Red Sea crisis led to the re-routing of input deliveries away from the Suez Canal. Figure 2 summarises the seasonally adjusted S&P Global UK Manufacturing Purchasing Managers' Index (PMI) posted 47.0 in January, up from 46.2 in December but below the earlier flash estimate of 47.3. The PMI has signalled a deterioration in operating conditions in each of the past 18 months. Four out of the five PMI sub-components – output, new orders, employment and stocks of purchases – were showing trends consistent with overall contraction. Manufacturing production decreased for the eleventh successive month in January, with the rate of contraction unchanged from December's solid pace. Companies linked lower output to weaker new work inflows, efforts to reduce inventory holdings and disruption caused by supply chain delays. Where an increase was reported, there was mention of work on existing contracts being used as a substitute for new orders to support production volumes. Contractions in output were signalled across the consumer, intermediate and investment goods industries. All of these sectors also saw intakes of new work fall during January.

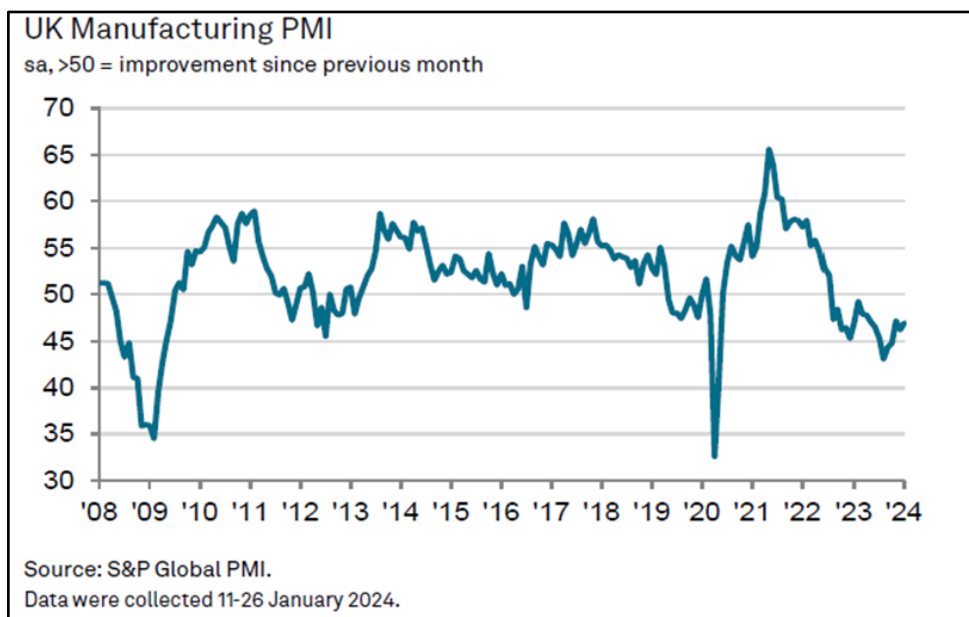


Figure 2: S&P Global/CIPS UK Manufacturing PMI

- UK construction companies indicated a strong improvement in business activity expectations in January, with optimism reaching its highest level for two years. This was despite an ongoing decline in current output levels and a marginal fall in incoming new work. Survey respondents often cited hopes of a turnaround in client demand due to looser financial conditions and more favourable underlying economic prospects. The headline S&P Global UK Construction Purchasing Managers' Index (PMI) – a seasonally adjusted index tracking changes in total industry activity – registered 48.8 in January, up from 46.8 in December and the highest reading since August 2023, as shown in Figure 3. That said, the index remained below the crucial 50.0 no-change

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threshold for the fifth month running and signalled a moderate decline in total industry activity. Civil engineering was the best-performing segment in January (index at 49.8), with output levels close to stabilisation. Commercial activity also showed some resilience, with the respective index pointing to only a marginal rate of decline (49.1). Meanwhile, house building continued to fall sharply at the start of 2024 (index at 44.2). Survey respondents noted subdued demand conditions and a lack of work to replace completed projects. The rate of contraction for residential activity nonetheless eased to the least marked since March 2023. January data indicated a reduction in total new work for the sixth consecutive month, but the pace of decline was only marginal and the weakest seen over this period. Companies reporting a fall in new business generally cited delayed decision-making among clients and subdued market conditions, especially in the house building segment.

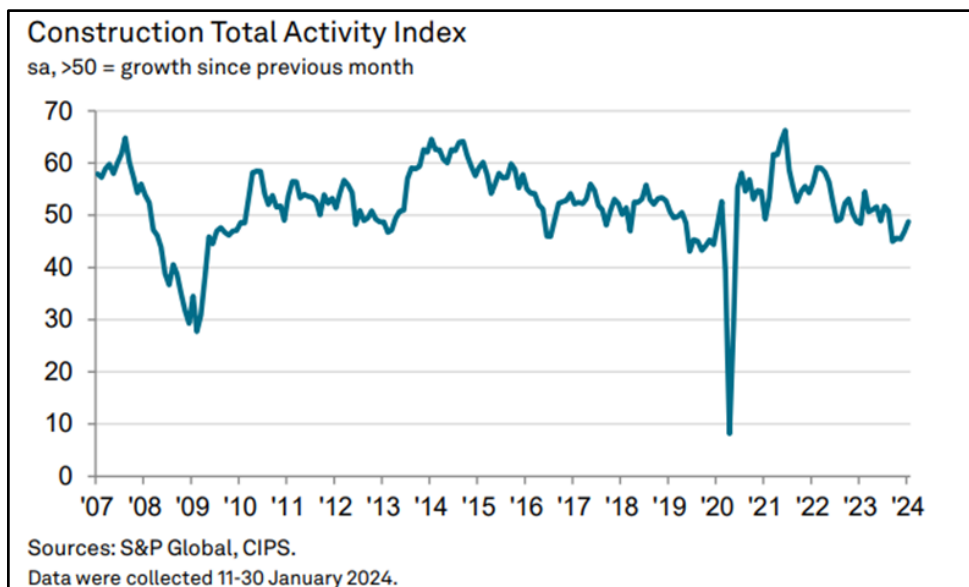


Figure 3: S&P Global/CIPS UK Construction PMI

- According to the Office for National Statistics (ONS), people spending less, doctors' strikes and a fall in school attendance dragged the UK into recession at the end of last year. The economy shrank by a larger than expected 0.3 per cent between October and December, after it had already contracted between July and September. The UK is in recession if it fails to grow for two successive quarters. For the whole of 2023, the UK economy grew by just 0.1 per cent, excluding the Covid years, that annual growth figure is the weakest since the 2009 global recession.
- ONS reported that the government finances showed a large surplus last month, more than double the surplus last January. The surplus - the difference between spending and tax income - rose to £16.7bn in January. ONS said the surplus was the result of higher tax receipts and lower spending, with the government no longer subsidising household energy bills for example. Every January, the government tends to take more in tax than it spends in other months due to the amount it receives in self-assessed

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taxes. In addition, the cost of financing the UK's debt has gone down as inflation has fallen.

- Energy costs and a price war between Britain's supermarkets have slowed food inflation to its lowest rate for nearly two years. The cost of meat, fish and fruit dipped in February, meaning food prices rose 5% on last year, down from 6.1 per cent in January and the lowest since May 2022, according to the British Retail Consortium (BRC) shop price index. Although the figures show prices are still rising, the rate is far lower than the increases consumers have consistently faced since rising energy prices triggered rampant inflation over the past two years. The index showed food prices fell 0.1 per cent in February on the previous month, its first monthly fall since last September.
- According to a report by the Energy and Climate Intelligence Unit (ECIU) and the Confederation of British Industry (CBI), the UK's net zero economy grew by 9 per cent in 2023, a report has revealed, in stark contrast to the 0.1 per cent growth seen in the economy overall. Nevertheless, the report pointed out that strong future growth from green businesses was being put at risk by government policy reversals, lack of investment and competition from the EU and US. Thousands of new green companies were founded in 2023 and overall the sector was responsible for the production of £74bn in goods and services and 765,000 jobs. Hotspots of net zero businesses and the well-paid jobs they provide occur across the country, rather than being concentrated in London and the south-east, the report found. It also highlighted strong net zero activity in some of the most deprived areas and in marginal constituencies that will be focal battlegrounds in the coming general election.
- Ahead of the Spring Budget, East Anglia businesses are calling on the government to provide help on costs, skills and taxes, according to BDO's bi-monthly Economic Engine survey. Nearly a third of regional businesses would like to see more support to reduce borrowing costs and flexibility on repayment of government loans, with more than one-fifth calling for better access to private capital and government grants. Half of East Anglia businesses still believe the government should offer greater support to resolve ongoing staff and skills shortages, including reforming the Apprenticeship Levy with greater focus on helping working parents.
- Almost half of workers in the region are actively looking or considering new job opportunities as the cost of living takes its toll whilst a quarter believe they could get paid more elsewhere, according to a survey from recruitment firm Reed.
- More new businesses were set up in Cambridgeshire, Norfolk and Suffolk during 2023 than in any previous year according to recent figures from the Inform Direct Review of Company Formations, using data from Companies House and the ONS. The three counties also recorded all-time highs for the total number of companies during the last 12 months. In Cambridgeshire, new formations rose 12.1 per cent to 8,677 on the

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previous year taking the total number of registered companies to 60,023; Norfolk saw 5,723 new formations, a rise of 6.3 per cent, taking the number of registered companies in the county to 48,437 whilst Suffolk saw 8,934 new formations rise 32.4% to 8,934, taking the total to 51,083.

- Business optimism in the region for the next 12 months strengthened in January driving a renewed increase in employment despite rising cost pressures, according to a key survey of purchasing managers. It showed that companies were increasingly positive in their expectations for growth and confidence was the strongest since last June. The NatWest East of England PMI business activity index - covering both manufacturing and services sectors - posted 50.7, little-changed from 50.9 in December but only the second, albeit marginal, expansion (above 50.0) over the past seven months. Private sector employment in the East rose for the first time in three months in January. Companies supported output by completing outstanding business, as new orders continued to fall. But average input prices continued to rise strongly in January with cost pressures greater at services firms.
- A rising tide of insolvent businesses in England and Wales could swell further and lead to a significant hike in corporate insolvency levels across East Anglia for 2024, according to the Eastern branch of R3. Insolvency Service figures show that there were 25,158 seasonally adjusted corporate insolvencies in 2023, up 14 per cent on 2022.
- More than a third of mid-sized businesses in East Anglia (34 per cent) are struggling to hire apprentices due to a lack of funding, according to survey of the sector from BDO. It showed that businesses in the region would like to hire more apprentices but lack sufficient resources or the guidance to do so and a quarter of firms want to see greater support from a future government to resolve staff or skills shortages, including reform to the Apprenticeship Levy. Only one in five respondents regularly hire apprentices through the Apprenticeship Levy, with high costs and a lack of guidance cited as the main barriers. But nearly one-fifth of regional businesses said they would increase hiring if they could work more closely with local schools and colleges. The survey also showed variations between sectors; many real estate and tech and media firms say they would hire apprentices if they had more guidance on starting a programme.
- More than one-half (60 per cent) of people think apprentices get paid a lower wage than those who have a degree, according to a survey of 2,000 people for communications agency PLMR ahead of National Apprenticeship Week (5-11 February). The Sutton Trust found higher apprentices (level 5 or above) have greater lifetime earnings than non-Russell Group university graduates and the advantage of

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not paying tuition fees. Public perceptions are changing with over half of those surveyed saying there is less of a stigma around apprenticeships than ten years ago.

- Business confidence in the wider economy fell in January in the East of England although firms' faith in their own prospects held steady and a balance of almost a third of companies plan to increase staff levels over the next year. A business barometer from Lloyds Bank Commercial Banking showed overall confidence fell by seven points in the region during January to 38 per cent due to a fall in optimism on the wider economy. Businesses' confidence in their own trading prospects remained steady month-on-month at 46 per cent. Meanwhile, a net balance of 31 per cent of businesses in the East also expect to increase staff levels over the next year, down just two points month-on-month. The dip in confidence on the economy in the East was in contrast to the national picture; overall, UK business confidence rose nine points in January to 44 per cent – its strongest start to a year since 2016 – and reflecting an improving outlook for services along with manufacturing and construction. But retail confidence dipped with signs of weaker footfall and sales in December.

Local Business

- Independent Norwich bookshop the Bookhive has been named one of the best in the UK. International publisher Faber named the shop, which is based in London Street, as its bookshop of the month in a recent feature. It described the Bookhive as a "Norwich institution".
- Norwich's Body Shop is set to remain open despite the chain going into administration amid predictions of widespread store closures. The Castle Street outlet is one of only a handful of Body Shops which are operated as a franchise so will keep its doors open, even as others are closed.
- A city coffee chain has been named among the most popular in the UK. Strangers Coffee, which has shops in Pottergate, Dove Street and in Jarrolds, is one of the top independent coffee companies in the country. Google, Instagram and TikTok data from more than 300 cafes and coffee roasters was looked at to determine which was the most popular - with Strangers ranking number six overall.
- A contemporary Scandinavian retailer is set to open a new store in Norwich this spring after Roche Chartered Surveyors secured Søstrene Grene as a tenant for premises at 15-17 London Street next to Jarrold's department store. Established in Denmark in 1973, Søstrene Grene is a home retailer, selling furniture, interior decor, kitchenware, party supplies, stationery and toys and has 15 stores across the UK.
- Norfolk's biggest indoor climbing centre is planning to relocate to a former office block. Highball Climbing Centre has submitted plans to transform Kirkham House in Whiffler Road, a recently refurbished office space, into a new climbing area. The owner of Highball, has applied to Norwich City Council to use the site for gym and indoor

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recreation. The business is currently based in Twickenham Road and became the city's first dedicated indoor climbing centre when it opened in 2012.

- Norwich is the worst city in the UK to hire a skilled contractor, according to collected data from specialist tradesperson insurers Merkel Direct, Norwich had the most trade shortages compared to searches per 10,000 residents. It found shortages in nine trades, including bricklayers, carpenters and electricians.
- A national food chain will be bringing its first outlet to Norwich after plans to move into the site of a former burger restaurant were approved. Rosa's Thai will replace the former Byron in Chantry Square, outside Chantry Place shopping centre.
- An Audi dealership which is part of the Robinsons Motor Group, is planning a significant expansion of its service and valet services on the edge of Norwich. Norwich Audi in the Meridian Business Park, near the A47 in Thorpe St Andrew, has revealed plans that would see a large extension built on the rear of its premises.
- Healthcare specialist Veincentre is to relocate to Norwich's Broadland Business Park. Veincentre, whose Norwich clinic is currently in Surrey Street, is to take a 1,200 sq ft lease in the Lakeside 500 office building, with a new facility set to open in May. The company is the UK's largest vein treatment provider with 33 clinics around the country and the move will enable it to expand its facilities for patients in Norfolk.
- High-street discount store Poundland, is in the process of moving into the former BHS premises in St Stephens Street. British Home Stores left the site in August 2016 as the department store disappeared from the nation's high streets. Primark temporarily moved in from April 2018 until December 2019 while its Haymarket shop underwent renovation.
- East Anglia's largest food and drink trade show is set to return with a new spring date to promote the region's bountiful produce. Local Flavours 2024 will be held in the recently-relaunched Norfolk Events Centre at the Norfolk Showground on March 20 - a new date aiming to capture the valuable spring/summer trade. The exhibition features more than 100 producers and attracts buyers representing tourism, hospitality, catering and food retail from across the UK and Europe.
- Norwich City football club has announced that its Yellow's restaurant will revert to only being open on matchdays. A club spokesman explained that it is "no longer viable" for Yellow's Bar and Grill to open on non-matchdays but will still be available for private hire.
- Two Norwich-based businesses have won prestigious awards at the world's biggest education technology awards show. Developing Experts and Bedrock Learning won awards at the Bett UK Awards 2024 - a celebration of the most innovative technologies transforming the lives of students and educators worldwide. Developing Experts won a Bett Award in the category Primary Digital Learning Product Broad Curriculum,

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offering a library of more than a thousand interactive science lessons - with experiments, handouts, assessments and career links which are mapped against the national curriculum. Bedrock Learning, a digital literacy resource designed to help secondary schools transform their English curriculum, won in the Secondary Digital Learning Product category.

Education

- A research project co-led by Prof Paul Hunter, from the University of East Anglia's (UEA) Norwich Medical School, has been awarded more than £3 million to carry out research into improving business continuity for health services following extreme weather events. This funding is part of more than £20 million awarded by the National Institute for Health and Care Research (NIHR) to eight new global health research projects, focused on healthcare in the context of extreme weather events caused by climate change. The projects aim to help strengthen health service delivery and resilience in low- and middle-income countries (LMICs).
- Six new £12 million research Hubs, the first of their kind in the UK, are being formed to utilise the latest advances in engineering biology to tackle major global challenges to our planet. UEA researchers are involved in two of the Hubs which are part of a new £100 million investment from the UK Research and Innovation's Technology Missions Fund and Biotechnology and Biological Sciences Research Council.
- The Global Game Jam is a collaborative project that operates worldwide every year, giving participants just 48 hours to construct a playable game from scratch. Each year a new theme is revealed, and teams from over 100 countries collaborate to construct an idea that both fits the brief and is possible to deliver within the time limit. Norwich University of the Arts' St. Andrews building was a jam site host, inviting participants to use the University's games development labs to work on their projects. This year Norwich University of the Arts hosted over 80 jammers, making the University the 8th largest site in the UK, and the 93rd largest out of 797 sites worldwide. The goal of the Global Game Jam is to stimulate innovation, experimentation, and collaboration across games design and production. It's not a competition, and anyone in the world is welcome to sign up and take part.

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Claimant count unemployment

Figure 4 summarises the trend in claimant count unemploymentⁱ. The 2020 impact of the Covid-19 pandemic was one of steep growth – with the most significant increase taking place between February and May 2020. Claimant count rates have fallen across each of the reported areas since that time. The rate in the Norwich city council area is currently just above the national level; it remains above pre-pandemic levels and is considerably higher than the urban area, the LEP area and the region.

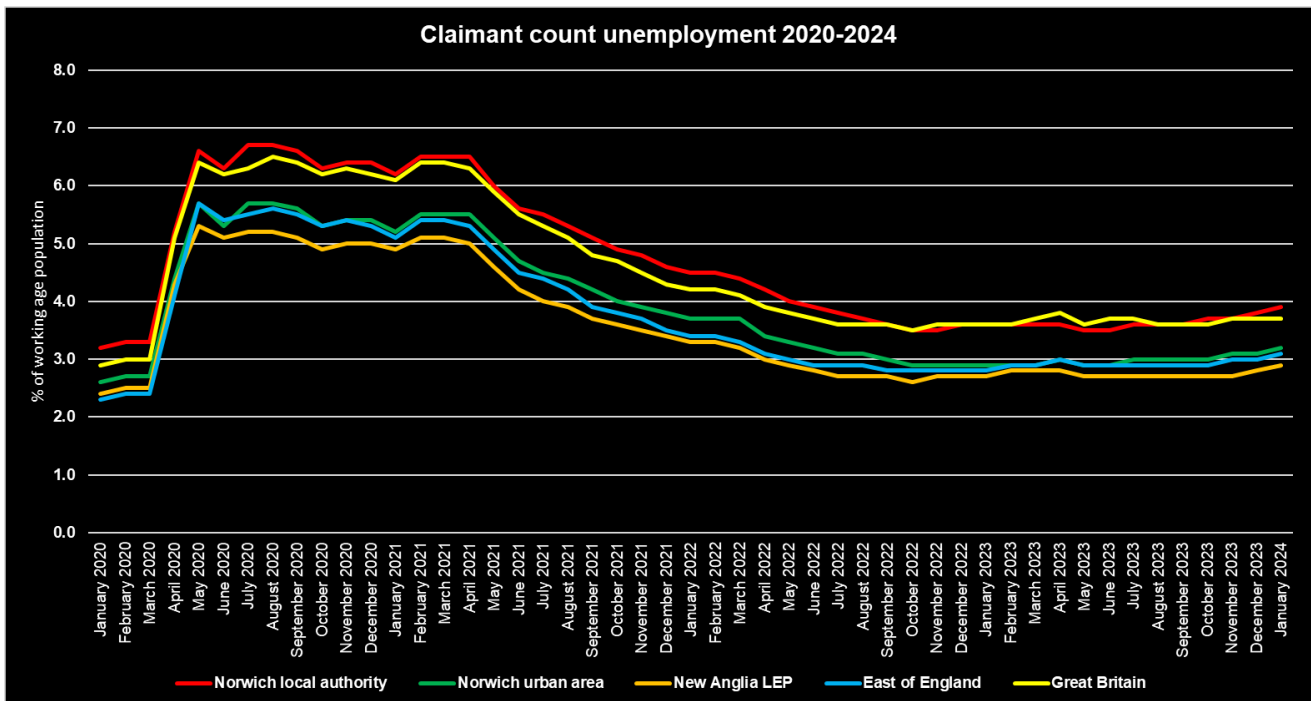


Figure 4 Claimant count unemployment 2020 to 2024

Table 1 Claimant count unemployment rate

	January 2023		December 2023		January 2024		Monthly change	Annual change
Gt. Britain	1,467,835	3.6%	1,507,975	3.7%	1,535,150	3.7%	0	+ 0.1%
East of England	110,580	2.8%	117,035	3.0%	119,950	3.1%	+ 0.1%	+ 0.3%
New Anglia LEP	27,310	2.7%	27,615	2.8%	28,630	2.9%	+ 0.1%	+ 0.1%
Norwich urban area	4,395	2.9%	4,615	3.1%	4,815	3.2%	+ 0.1%	+ 0.3%
Norwich city council area	3,505	3.6%	3,710	3.8%	3,830	3.9%	+ 0.1%	+ 0.3%

Table 1 shows that the claimant count unemployment rates increased across each of the reported areas relative to the same time last year. During January a marginal increase was

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seen in unemployment rates against the previous month across all the reported areas except for nationally where the rate was unchanged.

Ward level claimant count unemployment

Table 2 Claimant count unemployment

	January 2023		December 2023		January 2024		Monthly change	Annual change
Bowthorpe	285	3.4%	335	4.0%	345	4.1%	+ 0.1%	+ 0.7%
Catton Grove	310	4.4%	340	4.8%	340	4.7%	- 0.1%	+ 0.3%
Crome	275	4.6%	295	5.0%	300	5.1%	- 0.1%	+ 0.5%
Eaton	90	1.8%	80	1.6%	85	1.7%	+ 0.1%	- 0.1%
Lakenham	230	4.1%	280	5.0%	290	5.1%	+ 0.1%	+ 1.0%
Mancroft	480	5.7%	510	6.1%	520	6.2%	+ 0.1%	+ 0.5%
Mile Cross	420	5.8%	380	5.3%	395	5.5%	+ 0.2%	- 0.3%
Nelson	105	1.6%	125	1.9%	135	2.0%	+ 0.1%	+ 0.4%
Sewell	260	3.6%	260	3.6%	280	3.9%	+ 0.3%	+ 0.4%
Thorpe Hamlet	360	3.8%	370	4.0%	385	4.1%	+ 0.1%	+ 0.3%
Town Close	215	2.9%	235	3.1%	235	3.1%	+ 0.2%	+ 0.2%
University	165	1.5%	165	1.5%	165	1.5%	+ 0.2%	0
Wensum	315	4.0%	330	4.2%	355	4.5%	0	+ 0.5%

Table 2 shows that January's unemployment rates in Catton Grove and Crome wards saw a marginal reduction against the previous month. Rates in Wensum ward remained unchanged against the previous month and a small increase took place in the remaining wards.

Compared to the same time last year, the rate fell in Eaton and Mile Cross wards. The rate was unchanged in University ward; the remaining wards saw an increase in the rate over the year.

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Figure 5 demonstrates the wide variation in ward claimant count rates across the city council area. The differential between the lowest rate (University) and the highest rate (Mancroft) currently stands at 4.7 percentage points.

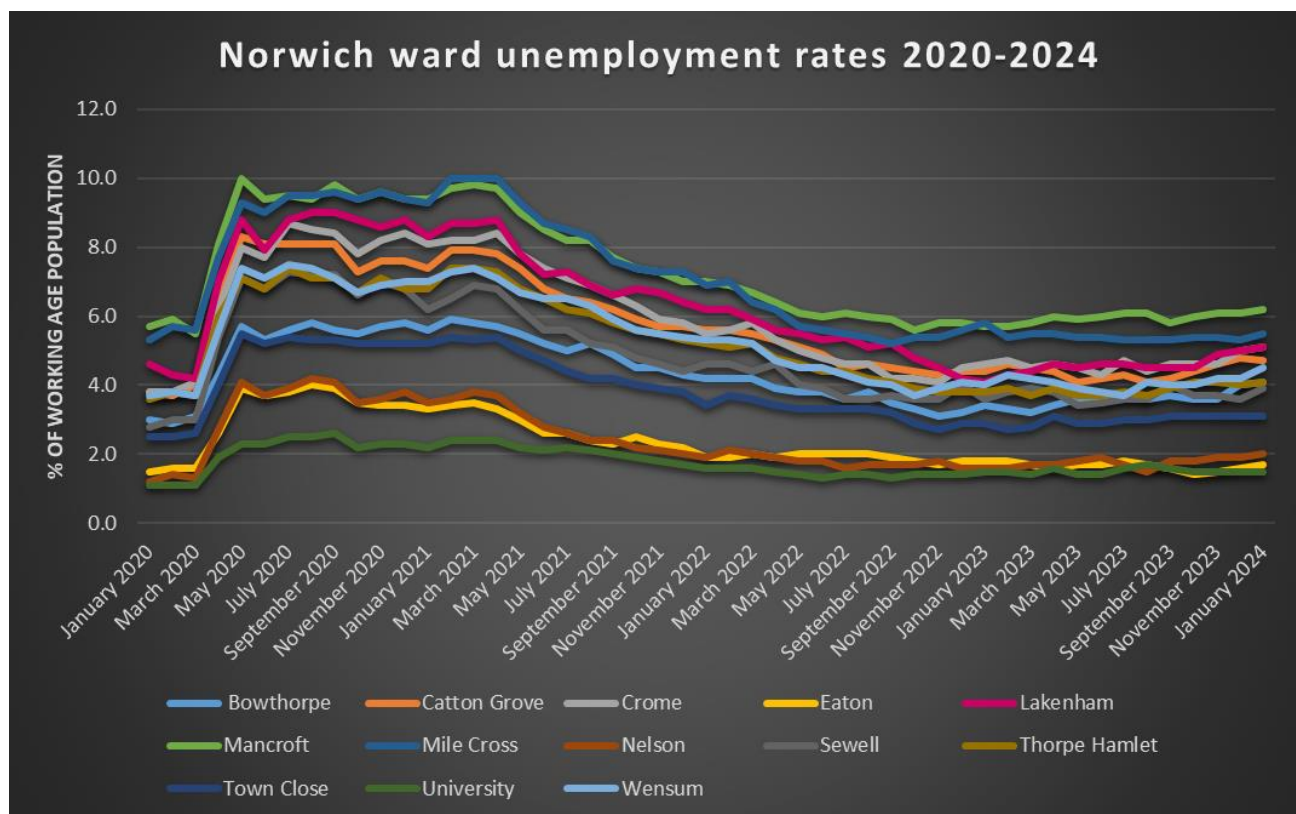


Figure 5 Norwich wards claimant count unemployment 2020 to 2024

Claimant count unemployment: male/female

In the Norwich city council area, around two in every five (42 per cent) out-of-work claimants are women. Over the month of January, female rates increased in Norwich (3.3 per cent) across the LEP area (2.6 per cent) and regionally (2.8 per cent); rates remained the same nationally (3.2 per cent).

Over the month, male unemployment rates increased slightly in Norwich, across the LEP area, regionally and nationally. The male unemployment rate is 4.5 per cent of working age males in Norwich, but lower nationally (4.3 per cent), in the LEP area (3.2 per cent) and regionally (3.4 per cent).

Norwich's male and female unemployment rates have continued as higher than rates in the LEP area and at the regional and national levels since records began in 1992. It is likely that Norwich's relatively high levels can be traced back to the loss of manufacturing jobs and the dominance of the service sector in the city.

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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 low resident earnings in Norwich are a contributory factor to the number of people claiming housing benefit.

Table 3 Norwich City Council housing benefitⁱⁱ claimants

	Number of claimants	Monthly change
January 2023	13,734	- 58
February 2023	13,735	+1
March 2023	13,664	- 71
April 2023	13,623	- 41
May 2023	13,645	+ 22
June 2023	13,639	- 6
July 2023	13,643	+ 4
August 2023	13,625	+ 18
September 2023	13,636	+ 11
October 2023	13,558	- 78
November 2023	13,519	- 39
December 2023	13,513	- 6
January 2024	13,480	- 33

Table 3 shows that the number of housing benefit claimants in the Norwich local authority area reduced by 33 claims during January compared to the previous month. Over the past twelve months housing benefit claims in Norwich have fallen by 1.8 per cent. Comparable national data is not available because of a time lag in data collection.

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Average house prices

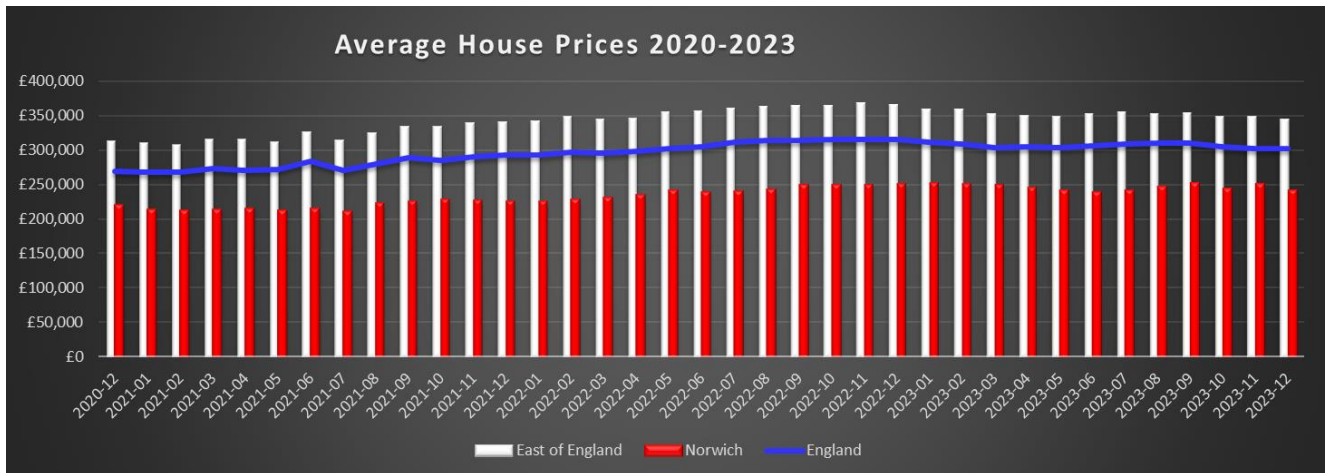


Figure 6 HM Land Registry average house prices 2020- 2023

The House Price Index (HPI) produced by HM Land Registry is the most accurate and independent house price index available for the UK.

According to HM Land Registry's HPI (Crown copyright) over the year, average house prices fell by 3.4 per cent in Norwich, by 3.8 per cent in the East of England and 2.1 per cent nationally. Figure 6 summarises average house price movements since December 2020.

During the month of December, average house prices grew by 2.7 per cent in England as a whole; but prices fell by 2.7 per cent in Norwich and by 0.5 per cent nationally.

The average house price in Norwich currently stands at £240,055 against £342,489 for the East of England and £302,164 for England.

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City centre vitality

Footfall data is provided by the Norwich BID (Business Improvement District).

Monthly Footfall Counts						
	Year to date %		Year on year %		Month on month %	
	2024	2023	2024	2023	2024	2023
Norwich	-4.9%	34.6%	-6.4%	31.3%	7.2%	10.8%
East	-5.7%	17.4%	-6.1%	19.6%	16.1%	17.6%
High Street Index - BDSU (BDSU - Comparison)	-3.4%	23.3%	-4.1%	22.1%	11.6%	12.8%
UK	-3.1%	15.7%	-3.7%	15.7%	11.4%	12.7%

Benchmark calculations (Year on Year and Month on Month) have been calculated using like for like data sets (only those counters available in both comparison periods) to ensure statistical accuracy

Figure 7 Monthly footfall counts

The total number of visitors for the year to date is 2,449,911 which is 4.9 per cent down on the previous year.

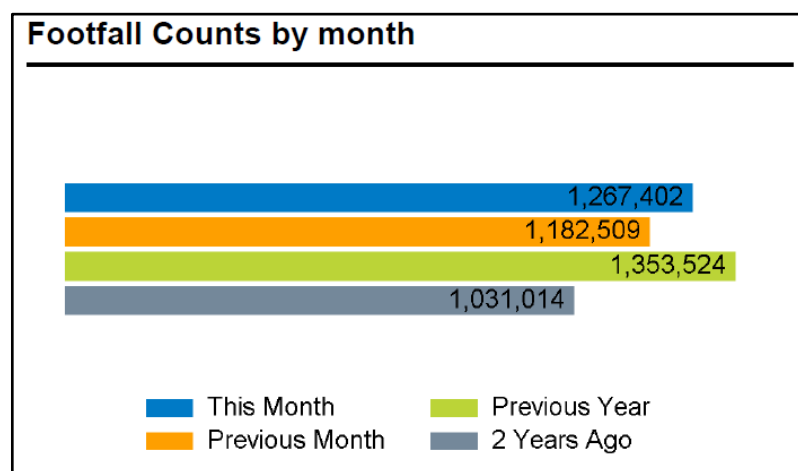


Figure 8 Comparison of monthly footfall

Figure 8 shows the total number of visitors to Norwich in the month beginning 29th January 2024 was 1,267,402.

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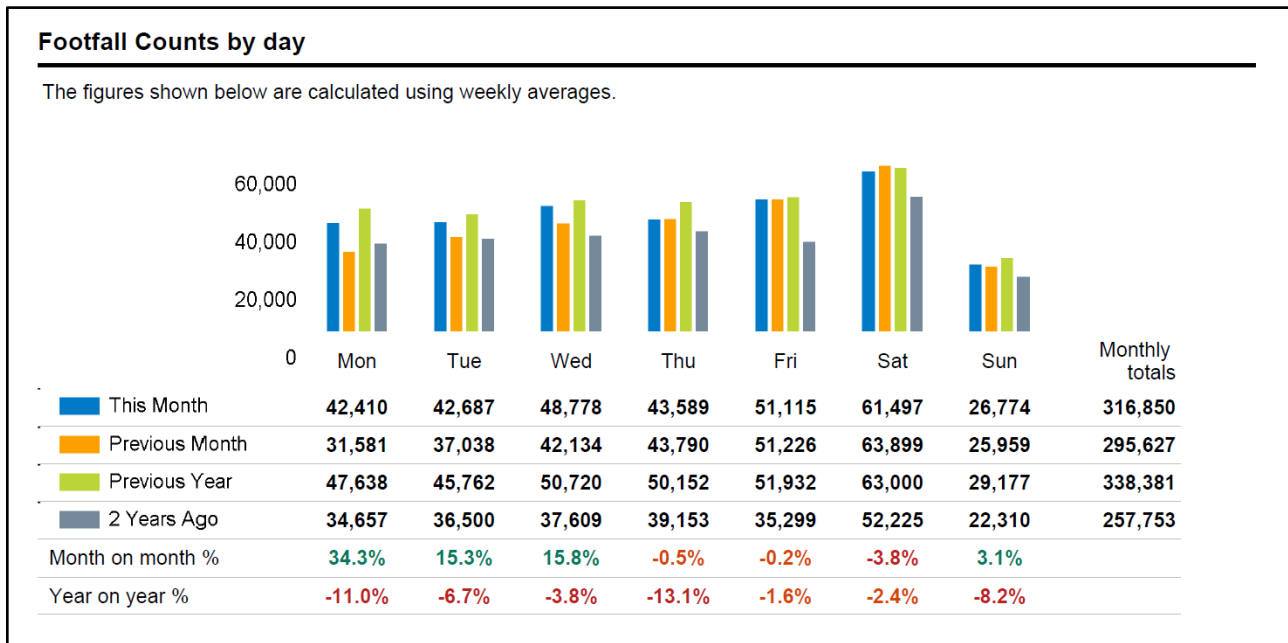


Figure 9 Footfall counts by day

The busiest day in the month starting from 29th January 2024 was Saturday 3rd February with 69,943 visitors. The peak hour of the month was 13:00 on Saturday 3 February 2024 with footfall of 9,001.

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Appendix

Contact details

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Data Sources:

Figure 1: S&P Global/CIPS UK Services Business Activity Index

Figure 2: S&P Global/CIPS UK Manufacturing PMI

Figure 3: S&P Global/CIPS UK Construction 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

Figure 7: Monthly footfall counts, Norwich BID

Figure 8: Comparison of monthly footfall, Norwich BID

Figure 9: Footfall counts by day, Norwich BID

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.

ⁱ The “claimant count” measure counts the number of people claiming Jobseeker’s Allowance plus those who claim Universal Credit and are required to seek work and be available for work. It replaces Jobseeker’s Allowance claimants as the headline unemployment benefit indicator.

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



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