The State of East Suffolk
2012
East Suffolk Profile
Overview

Introduction
The purpose of this report is to assist the East Suffolk Partnership in developing its priority areas for focus and action. This is the first east Suffolk profile following the merger of the Waveney and Suffolk Coastal LSPs. The aim is to profile and outline key economic, social and environmental information about east Suffolk, comparing this with county, regional and national statistics using data from a number of sources. These sources include the Suffolk Observatory, the Suffolk Annual Health Report, the State of Suffolk report, the Joint Strategic Needs Assessment and Community Led Plans.

What does East Suffolk mean to us?
There are significant opportunities to build on the area’s strengths and address its weaknesses; east Suffolk’ creates many different thoughts, ideas, images and feelings:

- The distinctive characteristics of the area’s smaller towns of Beccles, Bungay, Southwold, Halesworth, Aldeburgh, Leiston, Framlingham, Wickham Market, Saxmundham, Woodbridge, and the communities of Martlesham, Kesgrave and Rushmere St. Andrew as well as many villages; framed by the area’s two major towns, to the north Lowestoft, and to the south Felixstowe.
- East Suffolk’s major businesses and employers including BT, Sizewell Power Station, the Port of Felixstowe and a high proportion of small and medium sized businesses that are vital to the local economy.
- Business opportunities including renewable energy, local food production and tourism.
- The most easterly point in the UK.
- The coast – 79km in total.
- The excellent quality of the environment, as recognised in the substantial areas of countryside and coast that are designated as the Suffolk Coast and Heaths Area of Outstanding Natural Beauty, numerous Sites of Special Scientific Interest, national sites for wildlife including the flagship RSPB Nature Reserve at Minsmere and Waveney’s role as a gateway to the Broads National Park.
- Significant national heritage assets including Sutton Hoo, Orford Ness and Framlingham and Orford castles.
- Cultural festivals and venues: Snape Maltings and the Snape Festival, the Latitude Festival, the Marina and Seagull Theatres.
- Events such as the Lowestoft Seafront Air Festival.
- The different focus and influences on its communities – the north of the partnership area looking more to Norwich, the south to Ipswich and some communities looking as much to London as either of these local conurbations.
- The drive north to south along the A12 (and vice versa), the challenges of travelling ‘west’ from the north of the partnership area, the train journey
along the East Suffolk Line or along the Wherry Line between Lowestoft and Norwich.

- The challenges some of the people and communities in east Suffolk face
  - An ageing population which has social and economic consequences and offers opportunities such as the significant role older people play in voluntary and community sector activities;
  - Areas of rural isolation with problems associated with remote areas that have limited employment opportunities, low wages and lack of access to services;
  - High levels of urban deprivation in Lowestoft (with 5 neighbourhoods being in the highest 10% deprived neighbourhoods nationally);
  - Pockets of deprivation in some of our rural, urban and coastal communities which are obscured in statistics because of the average district level data.
- 92% of residents are satisfied with Suffolk Coastal as a place to live, and 81% of Waveney residents are satisfied with their local area as a place to live (Place Survey, 2008)

**What are the characteristics and trends of east Suffolk’s population?**
- East Suffolk is home to around 241,800 people (ONS 2010).
- Since 2001, the population of the area has grown by 6.4%.
- The population of east Suffolk is forecast to increase by 41,000 (17%) by 2035.
- The population is forecast to age significantly in the coming years, with all of the 41,000 increase expected to come in the 65+ age category – see below (ONS 2010 based projections).
• East Suffolk is less ethnically diverse than other parts of Suffolk with 98.4% of the population from white ethnic backgrounds in 2001, 96% in 2007.
• There are pockets of higher black and minority ethnic populations (over 5% in 2001) to the north of Lowestoft and in Framlingham.
• Further detailed analysis of population and ethnicity in east Suffolk will be possible when 2011 Census data becomes available.

What opportunities and challenges are there in terms of east Suffolk’s economy, employment and education?
The picture is of a relatively prosperous area, but the economic and social challenges faced by Lowestoft impact on the picture for the north of the partnership area.
• Overall, it is forecasted that employment will be up by 6,500 people by 2031. Key employment growth sectors are finance and business services and transport, hotels and restaurants.
• The main employment sectors in east Suffolk are retail (11,300) followed by health (10,100), manufacturing (9,600), transport and storage (8,600) and education (8,200).

Almost 75% of businesses in east Suffolk are micro businesses, employing less than 5 people, and over 99.5% of businesses are classed as SMEs (Small and Medium Enterprises, employing less than 250 people).
• Major/well known employers in east Suffolk include BT at Martlesham, the Port of Felixstowe, CEFAS, SLP Engineering and Birdseye in Lowestoft, Bernard Matthews in Halesworth, the County and District Councils, Adnams in Southwold, Sizewell Power Station, and Clays Printing in Bungay.
The Port of Felixstowe is the UK’s largest container port with over 40% of country’s container cargo – approx £60bn imports & exports pass through Felixstowe each year. Current expansion could add £20bn to this figure (1,500 new jobs).

There is a marked difference between workplace-based earnings (i.e. people who work in the area rather than live in the area). Suffolk Coastal’s work-based earnings are above the national and Suffolk average, but Waveney earnings are considerably below both.

<table>
<thead>
<tr>
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<th>Median weekly earnings, ONS Annual Survey of Hours and Earnings 2011</th>
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<tbody>
<tr>
<td>Suffolk Coastal</td>
<td>£536 p/w</td>
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<tr>
<td>Waveney</td>
<td>£415 p/w</td>
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<tr>
<td>Suffolk</td>
<td>£467 p/w</td>
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<tr>
<td>Great Britain</td>
<td>£503 p/w</td>
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Parts of Lowestoft are the only places in east Suffolk where Job Seeker’s Allowance claimants are over 7% of the eligible population. The rest of Lowestoft has rates of 4-7%; parts of Felixstowe and Beccles also have rates of 4-7%. In the main Suffolk Coastal has a low JSA rate - under 1.5%

Overall, unemployment is forecast to drop to 1.5% by 2031 (claimant unemployment). Currently Suffolk Coastal is 2% and Waveney is 4.5%.

Tourism is vitally important to east Suffolk, with over 9 million visitors annually contributing over £500 million to the local economy and providing employment for almost 11,000 people. More people are employed in the sector in Waveney though a greater number of visitors and higher spending occurs in Suffolk Coastal.
• There is a significant focus on local food and drink produce in east Suffolk, with numerous farmers markets, food markets and festivals such as the Aldeburgh Food and Drink Festival.
• The proportion of schools judged as “Outstanding” by Ofsted is lower in east Suffolk than across the county as a whole, though there is a greater proportion of “Good” schools.

<table>
<thead>
<tr>
<th>Ofsted rating</th>
<th>Suffolk Coastal</th>
<th>Waveney</th>
<th>Suffolk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outstanding</td>
<td>17.86%</td>
<td>16.67%</td>
<td>19.58%</td>
</tr>
<tr>
<td>Good</td>
<td>48.21%</td>
<td>58.33%</td>
<td>47.48%</td>
</tr>
<tr>
<td>Satisfactory</td>
<td>30.36%</td>
<td>25.00%</td>
<td>30.86%</td>
</tr>
<tr>
<td>Inadequate</td>
<td>3.57%</td>
<td>0.00%</td>
<td>2.08%</td>
</tr>
</tbody>
</table>

• Suffolk Coastal has the best attainment levels in Suffolk with 58.5% of young people achieving 5 A* GCSEs (including English and Maths). 48.4% of Waveney’s young people get 5 A* GCSEs. The Suffolk average is 52% and national average is 58.2%
• Levels of incapacity benefit/employment support allowance (IB/ESA) claimants in east Suffolk are lower than the national average, though Suffolk Coastal (1.3%) has a much lower percentage of IB/ESA claimants than Waveney (2.1%), which is above the Suffolk average of 1.6%
• Carers allowance claimant levels are relatively high in Waveney (1.2% of working age adults), while in Suffolk Coastal the figure is similar to the county and national average at 0.9%

**Place Profile: Kirkley**

Kirkley ward is the area directly to the south of the Bascule Bridge in Lowestoft. The area is bounded to the east by Lowestoft’s main beaches and includes South Lowestoft Industrial Estate, Waterlane Leisure Centre, the Royal Norfolk and Suffolk Yacht Club and the retail area of London Road South.

Kirkley is in the highest 7% of wards nationally in the Index of Deprivation 2010. In addition, November 2011 data shows that Kirkley has a significantly higher proportion of benefit claimants (27.4%) than the national picture (14.7%).

In particular 8.8% of the population receives Job Seekers Allowance (nationally 3.8%). The proportion of JSA claimants is higher in the young (31% of all claimants) and the older category (18%) than the national proportions. In addition the duration of claims is higher than the national average. ESA and incapacity benefit is claimed by 11.5% of the population against 6.5% nationally.

The percentage of 16-18 years olds who were not in Employment Education or Training (NEET) in September 2011 was 6.7%. The Suffolk average was 4.6%. 
Kirkley exhibits significant health inequalities. It has the lowest life expectancy for men in Suffolk (72 years as opposed to 79 years Suffolk average). Women’s life expectancy is 77.8 years compared to the Suffolk average of 83.4 years).

The ‘Our Kirkley’ initiative, involving a wide range of partners, seeks to improve health, offer new social opportunities and address problems faced by people who are not in regular work. The initiative encompasses a range of approaches including health awareness sessions, debt advice, basic learning and skills, job searches, volunteering opportunities, a work club and activities to strengthen established community groups. Our Kirkley has identified some key challenges for the area including those already outlined plus high levels of binge drinking, housing overcrowding – flats and houses in multiple occupation and poor cheap quality accommodation, the need for community inclusion and to develop community spirit.

To what extent does the area’s housing meet present and future needs?

- Affordability is an issue for young people (in tune with the national picture).
- Average house prices in Suffolk Coastal are £206,000 and in Waveney £138,000 (2011).
- Lower quartile house prices in Suffolk Coastal are £152,000 and in Waveney they are £107,000 (2011). A first time buyer mortgage from Halifax on a lower quartile house (borrowing 75% of the value of the property, 30 year term, fixed rate for first 3 years gives repayment per month of: Coastal = £556, Waveney = £391. This is against average earnings in Suffolk Coastal of £510 p/w and Waveney of £447 p/w (2011).
- Permanent dwellings completed in 2011/12 in Suffolk Coastal amounted to 160; 140 were completed in Waveney. Permanent dwellings started in 2011/12 in Suffolk Coastal was 200, and in Waveney was 120.
- In Waveney in 2008/9 the rate of households accepted as homeless and in priority need was 1.6 per 1,000 households and in Suffolk Coastal it was 0.3 per 1,000 households. Both these figures were lower than the East of England and England rates (2.1 per 1,000 and 2.5 per 1,000). Across the whole of east Suffolk the rate of homeless households had decreased significantly between 2004/5 and 2008/9 (from 5.4 per 1,000 in Waveney and from 2.7 per 1,000 in Suffolk Coastal).

What are the key factors relating to travel, transport and access to services?

- In terms of access to services, 80% of residents in large parts of southern Waveney and northern Suffolk Coastal have 60mins + journey times to NHS hospitals by public transport. In parts of Suffolk Coastal there are significant numbers of residents that have 30mins + journey times to the nearest market town by public transport.
• The new rail freight terminal at Felixstowe will double the number of goods trains that can use the port (with a long term reduction in the number of lorries on the A14).
• There are a number of growth opportunities in the partnership area including offshore renewable energy, nuclear energy, ports and ICT sectors. The necessary infrastructure for the development of these sectors needs to be in place as well as dovetailing into the emerging Growth sector work being undertaken by the New Anglia Local Enterprise Partnership.
• The Beccles loop provides a place for trains to pass each other on the single track line. This will allow an hourly service to Lowestoft from Ipswich, which is scheduled to start in December 2012.
• LEP rail manifesto is at: http://www.newanglia.co.uk/Assets/Files/Content/Rail%20prospectus%20for%20East%20Anglia.pdf

For Suffolk the key outcomes during the next passenger franchise period (2014 to 2029) and the Network rail investment periods 2014-2019 and 2019-2024 are:
1. Great Eastern Main Line - shorter journey times, better, more comfortable trains and more capacity.
2. An hourly service between Ipswich and Peterborough to provide better connections to the East Coast Main Line and improved links between Suffolk, Norfolk and Cambridgeshire.
3. Increased capacity on the Felixstowe to Nuneaton freight route (which shares the line with passenger services to Peterborough) so that there is sufficient capacity for passenger and freight growth. Electrification of this route.
• East West rail is a longer term project to reconnect Oxford and Bedford to Cambridge. This will allow connections to the West Country without going through London.

• The A14 Challenge, commissioned by the Department for Transport, is considering three draft public transport improvement packages, two draft freight improvement packages and six draft highway improvement packages, tolling options, and funding and finance issues along the entirety of the A14 route.

• Proposed Sizewell C new build – opportunities for provision of Four Village Bypass and rail services to Leiston is being pursued.

• Lowestoft - significant programme of improvements being delivered including signalisation of Station Square / Commercial Road, new cycle bridge across Lake Lothing, redesigned station interchange, new bus services.

What are the characteristics of east Suffolk’s environment?

• East Suffolk has a significant amount of land designated as Area of Outstanding Natural Beauty (AONB) and Sites of Special Scientific Interest (SSSI). These sites are key features of east Suffolk’s tourism offer.
• In line with Suffolk trends, CO₂ emissions in east Suffolk are decreasing while the % of household waste sent for re-use, recycling or compost is increasing.
• East Suffolk has over 2,100 renewable energy systems registered for the electrical feed in tariff, generating 7MW capacity. The vast majority of these are domestic photovoltaic systems.
• A number of local groups have formed to tackle issues relating to the environment and local sustainability. These include:
  ▪ Greener Fram
  ▪ Transition Woodbridge
  ▪ Otley Green
  ▪ GreenerSax
  ▪ Sustainable Bungay
  ▪ Sustainable Beccles
  ▪ Halesworth in Transition
• The AONB Unit are currently reviewing and consulting on their management plan. This will identify the key challenges for the area over the next few years.

The Suffolk coast is famous for breeding Avocets

What is the role of east Suffolk’s coast and estuaries?
• The Suffolk coast is 79km long. Four major river estuaries, the Orwell, the Blyth, the Alde/Ore and the Deben, cut the coast.
• There are four major towns - Lowestoft, Southwold, Aldeburgh and Felixstowe - and many smaller towns and villages, all within the coastal strip.
• The shoreline area is essential for the local, regional and national economy. This relies heavily on shoreline-related tourism, agriculture, two major ports and several smaller harbours.
• Suffolk is continuing to suffer a net loss of land to the sea, with erosion affecting 54% of its coastline.

**Place Profile: Waldringfield**

Waldringfield is a small village of 475 people. Due to its location on the River Deben and its proximity to places like Ipswich, Kesgrave and Woodbridge it is also an attractive village destination, particularly for river users and those wanting to visit the local pub which sits on the banks of the river. As part of a recent village review, the local community identified the following as the main reasons they liked living in Waldringfield:

- Riverside location
- Country walks
- Friendly atmosphere
- Active community
- Excellent village hall

Residents valued the fact that the village is relatively unspoilt and quiet but that it was also in a location where it is easy to access services, leisure and work in the surrounding towns.

The scenario below, based on discussions as part of the village review process, illustrates a number of questions and challenges that are facing many east Suffolk villages as they think about their future.

The long term sustainability of the local primary school is seen as a main priority for the future of Waldringfield. The ageing population, affordability of homes in the village for younger families and the increasing number of second homes in the village are all factors that villagers felt could impact on the sustainability of the local school. The proposed large housing development at Adastral Park could bring younger families to the area which could in turn contribute to the sustainability of the school. However, the development also raises concerns about the impact on the village in terms of the number of additional visitors it may bring and the effect this may have on traffic, parking and, in the opinion of some residents, the loss of the village’s identity.

**How healthy and well are east Suffolk’s people?**

- In 2003-07 the difference in life expectancy in Waveney between males living in the most deprived parts of the district compared to the most affluent part of the district was 9.6 years. For females the gap was 6.4 years. In Suffolk Coastal the gap is much smaller – 3.9 years for males and 3.1 years for females.
In Waveney health inequalities are related to regional prospects (job supply, income etc), household conditions, behaviours and environments and health status (physical and psychological morbidity). Suffolk Coastal is a relatively healthy area but performs relatively badly for access to secondary health care and access to social care.

Lifestyle plays an important part in health – for example in Suffolk Coastal there is higher percentage of dining out and home owning couples with high levels of fat and confectionery consumption compared to Suffolk as a whole.

School children taking part in 2 or more hours of quality physical education and sport in Suffolk Coastal is lower than the Suffolk average (84.8% vs. 89.7%).

In Suffolk Coastal the proportion of people reporting that they consume the recommended daily amount of fruit and vegetables (49.7%) is higher than the NHS Suffolk average (43.6%); in Waveney (42.6%) the figure is similar to the Suffolk average.

In Waveney levels of child obesity are slightly higher than the Suffolk average whereas in Suffolk Coastal the levels are lower. The Waveney figures for adult obesity are similar to the Suffolk average but in Suffolk Coastal the figures are below average.

Prevalence of smoking in Waveney (19.8%) is consistent with the Suffolk average (18.1%) but is much lower in Suffolk Coastal (12.0%)

People in both districts reporting hazardous and harmful levels of alcohol consumption are consistent with the Suffolk average. However, hospital admission rates for alcohol related causes among females in Waveney rose by 57.7% between 2003/4 and 2007/8.

In Waveney in 2005-7 the teenage conception rate was higher than the rates for Suffolk and East of England. In Suffolk Coastal the teenage conception rate was relatively low and decreasing.

The Health & Wellbeing Board will be developing their strategy for tackling health issues in Suffolk, based on evidence collated in the Joint Strategic Needs Assessment.

Newly published data will update this information shortly.

Crime and community safety

East Suffolk is generally a safe place to live and work, with crime at a similar level or better than other areas.

Higher levels of crime are recorded in Waveney (73 offences per 1,000 population) than in Suffolk Coastal (46 offences per 1,000 population).

Recent trends show a declining number of incidents in many types of criminal activity.

Crime in Suffolk Coastal was down by 98 offences (1.7%) from 2010/11 to 2011/12 while in Waveney there has been a fall of 386 offences (4.5%) in the same period.

Reductions in crime and disorder in Suffolk Coastal include Serious Sexual Offences (16% reduction), robbery (51% reduction), vehicle crime (10% reduction) domestic burglary (17% reduction), arson (26%)
• Increases in crime in Suffolk Coastal in the 12 month period relate to the offence categories of: a) violence against the person (8% increase) in particular the level of low level of violence which did not result in injury, and b) most serious violent Crime (7% increase) in particular serious wounding without intent.

• In terms of recorded crime in Waveney there have been some great reductions achieved over the last year which are mainly focused around violence against the person (6%) Public order and harassment (15%), Criminal Damage, (13%).

• Although overall crime has reduced in Waveney some areas of crime and disorder have increased: assault without injury has increased and overall the category of serious violence and sexual offences has increased by 13%.

• An upward trend in burglaries in Lowestoft has been identified (see graph below)

![Lowestoft Dwelling Burglary Trend](image)

• Around 55% of ASB calls to police relate to reports of Rowdy/Inconsiderate ASB. During 2011/12 the overall number of ASB incidents fell in both Suffolk Coastal (13% reduction) and Waveney (9% reduction). However, Waveney saw an increase in the level of Rowdy/Inconsiderate ASB, of 2%.

Troubled Families

• As part of the Troubled Families Initiative east Suffolk families are being identified for a new approach to enable them to turn their lives around. Identifying factors for these families are youth crime or anti social behaviour, absenteeism from school and worklessness. Further information on numbers of families in east Suffolk will be available over the coming months once all the data is collated.
**Conclusion**

East Suffolk has much to celebrate. There are high satisfaction levels of the area as a place to live, an excellent environment and landscape, a diverse economy supported by large employers and lots of SME’s, a safe place to live, and strong communities. However, the data suggests that there are some issues and trends that need to be addressed. These include:

- unemployment (young people and long term unemployment);
- educational attainment / employment skills;
- deprivation and inequality (including trends, hidden deprivation and hotspots in towns and urban areas);
- access to services, especially rural access / connectivity and demand to improve transport infrastructure;
- Housing – supply and decent homes;
- Areas where there are higher levels of crime and perceptions of crime;
- The impact of coastal erosion / flooding.

There are significant opportunities for the East Suffolk Partnership to build on the area’s strengths and address its weaknesses.