









St Edmundsbury Profile

Patterns of economic activity and nature of economy	Overall employment rate (aged 16-64)	 High (70%) but falling amber
	Average employee earnings (workplace)	 Low (£455) and decreasing red
	Jobs density	 High (0.98) and increasing green
Entrepreneurial culture	Level of self employment	 Average (14.6%) and rising green
	New business registrations per 10,000 adults	 Low (42) but rising amber
Skills levels and aspirations	Population aged 19-59/64 qualified to at least level 2 or higher	 High (78%) and rising green
Patterns of unemployment and deprivation	People aged 16-64 on out of work benefits	 Low (7.6%) and falling green
Housing affordability	Ratio of median house price to median earnings	 Average (7.33) but falling green

Key Issues

- Dependence on lower value manufacturing and processing sectors, with few higher value activities
- Business space dominated by warehouse and factory space could limit the opportunities for higher value businesses to locate in the area
- Low, and decreasing, average workplace employee earnings, and low average resident employee earnings
- Lower than average proportion of residents employed in 'high value' occupations
- Low birth rates of new business may hinder innovation and competition amongst firms

ECONOMIC ASSESSMENT OVERVIEW	Cambridge City			East Cambridgeshire			Fenland			Huntingdonshire			South Cambridgeshire		
	Performance against Cambridgeshire average	Performance against national average	Direction of travel	Performance against Cambridgeshire average	Performance against national average	Direction of travel	Performance against Cambridgeshire average	Performance against national average	Direction of travel	Performance against Cambridgeshire average	Performance against national average	Direction of travel	Performance against Cambridgeshire average	Performance against national average	Direction of travel
PEOPLE															
Overall employment rate (aged 16-74)			↑			↑			↑			↓			↑
People aged 16-64 on out of work benefits			↓			→			↑			↓			→
Proportion of population aged 19-59/64 qualified to at least level 2 or higher			↑			↑			↓			↓			↑
Proportion of population aged 19-59/64 qualified to at least level 4 or higher			↑			↓			↑			↑			↓
5+ A*-C grades at GCSE inc English and Maths			↓			↓			↑			↓			↑
BUSINESS															
New business registration rate (2011)			↑			↑			↑			↑			↑
Percentage of small businesses in an area showing employment growth (discontinued) (2008)			→			→			→			→			→
Labour productivity (2010)			↓			↑			↑			↑			↑
Jobs density (2011)			↑			↑			↓			↓			↓
Median earnings of employees in the area (2012)			↑			↓			↑			↓			↑
PLACE															
CO2 emissions per head (2009)			↑			↑			↑			↑			↑
Housing affordability			↓			↑			↑			↓			↑
GVA per capita (2010)			↓			↑			↑			↑			↑
Place Survey results			-			-			-			-			-

	Forest Heath			St Edmundsbury			North Hertfordshire			Uttlesford		
	Performance against Cambridgeshire average	Performance against national average	Direction of travel	Performance against Cambridgeshire average	Performance against national average	Direction of travel	Performance against Cambridgeshire average	Performance against national average	Direction of travel	Performance against Cambridgeshire average	Performance against national average	Direction of travel
PEOPLE												
Overall employment rate (aged 16-74)			↑			↓			↑			↑
People aged 16-64 on out of work benefits			↓			↑			↓			↑
Proportion of population aged 19-59/64 qualified to at least level 2 or higher			↑			↑			↑			↑
Proportion of population aged 19-59/64 qualified to at least level 4 or higher			↑			↑			↑			↓
5+ A*-C grades at GCSE inc English and Maths			↓			↑			↑			↑
BUSINESS												
New business registration rate (2011)			↑			↑			↑			↑
Percentage of small businesses in an area showing employment growth (discontinued) (2008)			→			→			→			→
Labour productivity (2010)			↑			↑			↑			↑
Jobs density (2011)			↓			↑			→			↑
Median earnings of employees in the area (2012)			↓			↓			↑			↑
PLACE												
CO2 emissions per head (2009)			↑			↓			↑			↑
Housing affordability			↓			↑			↑			↓
GVA per capita (2010)			↓			↑			↑			↓
Place Survey results			-			-			-			-

KEY	
	Better than average
	Similar to average
	Worse than average
↑→↓	Direction of travel

St Edmundsbury SWOT

Strengths

The general level of prosperity across the district is relatively high.

Relatively high levels of resident satisfaction.

Low unemployment and evidence of some resilience to the impact of the recession.

A high and increasing jobs density and high business density, supported by businesses employing a higher than average number of workers.

Weaknesses

Productivity of labour is low, despite having high business and jobs densities.

Relatively high proportion of incapacity benefit claimants compared with other Greater Cambridge districts, but still low compared with the national average.

Housing is relatively unaffordable.

Opportunities

A fairly well skilled adult population and relatively good educational attainment levels.

If higher value employment could be developed within the district, attracting the existing base of higher skilled residents to work within the district, productivity levels might increase.

Threats

A relatively large population, but a lower than average proportion of working age suggesting that economic activity levels may drop in the future.

Recent slight increase in recorded crime levels.

Dependence on lower value manufacturing and processing sectors, with few higher value activities.

A relatively low birth rate of new enterprises can reduce competition and restrict business innovation and competition.

Business space dominated by warehouse and factory space could limit the opportunities for higher value businesses to locate in the area.

Fuel poverty is a particular issue in rural parts of the district.

Labour market, prosperity and crime

A relatively large population, but lower than average proportion of working age

- St Edmundsbury has an estimated resident population of 111,000.
- 63% of residents are of working age, which is a lower proportion than seen nationally (65%) and one of the lowest proportions in Greater Cambridge.

Out commuting of some higher value workers but also some lower value workers

- 47% of the district's residents are employed in 'high value' occupations, which is the second lowest proportion in Greater Cambridge.
- Employed residents have strong commuter links to Cambridgeshire, with around 6% of the Cambridge/South Cambridgeshire workforce commuting in from St Edmundsbury – an estimated 10,000 people.
- Average employee wages, both resident and workplace, are below the national average, and among the lowest ranking of the Greater Cambridge districts.

Relatively high levels of resident satisfaction

- The 2008 Place Survey recorded that 88% of St Edmundsbury residents were satisfied with their local area as a place to live, similar to the average across Cambridgeshire and above the national average of 80%.

Relatively low crime rate

- When examining crime data, crime counts are typically examined by Crime and Disorder Reduction Partnership areas. Within Suffolk, Forest Heath and St Edmundsbury come under the same area – Western Suffolk, which also covers Mid Suffolk.
 - Western Suffolk as whole has a crime rate of 46.38 per 1000 people, which is lower than the Cambridgeshire average rate. The rate of crime in the Western Suffolk area fell in the year 2012/13.
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Skills levels, education and skills demand

A relatively well skilled adult population

- St Edmundsbury performs well in terms of the proportion of those qualified to at least NVQ level 2 or higher, with 78% of the resident population aged 19-59/64 qualified to this level. This is above both the Cambridgeshire average and the national average.
- 6% of the population has no qualifications – well below the regional and national averages.
- NVQ level 4+ is generally recognised as the skill level required to drive innovation and leadership within the economy and to enable businesses to compete globally. Around 33% of St Edmundsbury residents are qualified to this level, just below the national average of 35%.

Relatively good educational attainment levels

- Attainment levels among young people studying in the district are better than average with 52% of 15 year olds reaching level 3 by age 19, compared with a national proportion of 48%.
 - In terms of attainment at age 14-16, however, performance is just below the national average, with 57% of pupils living in the district achieving 5+ GCSEs grades A*-C including Maths and English, compared to the national average of 59%.
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Patterns of unemployment and deprivation

Low unemployment and relative resilience to the impact of the recession

- The unemployment rate across St Edmundsbury is low in 2011 with 3.5% of residents aged between 16 and 74 in unemployment compared with a national average of 5.2%.
- From December 2011 to December 2012, the number of Jobseeker's Allowance claimants decreased by 3.9%. This was one of the largest decreases in the Greater Cambridge area.

Similar rate of out-of-work benefit claimants to Cambridgeshire as a whole

- In February 2012, 7.6% of the working age population was claiming some kind of out-of-work benefit; this is just above the rate for Cambridgeshire of 7.4% but lower than the national figure of 12%.

Generally low levels of deprivation, however some pockets in urban areas

- The most deprived Lower Super Output Areas in the district, according to the Index of Multiple Deprivation, are concentrated in Haverhill and Bury St Edmunds. [Map 4]

High levels of fuel poverty in some areas

- Fuel poverty is influenced by three factors: low incomes, high fuel costs and thermal efficiency of the housing stock. There are high levels of fuel poverty in rural areas of the district (DECC 2009).
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Nature of the economy

Low labour productivity but high GVA per capita

- Knowledge intensive employment is the same as the national average at 12% and public sector employment is just above the national average at 32%.
- The majority of workers in higher value occupations are in professional occupations.
- Median earnings of employees are below both the Cambridgeshire and national averages, with the gap between the earnings of men and women amongst the lowest in Greater Cambridge.
- The East of England Forecasting Model estimates that labour productivity and GVA per capita (a measure of general prosperity) in St Edmundsbury is the highest in Greater Cambridge.

Dependence on lower value manufacturing and processing sectors

- The professional, scientific and technical sector accounts for the largest number of businesses, followed by the construction industry, retail and the production sector.
- Dominant employment sectors are manufacturing (around 14% – significantly higher than the national average), followed by health and business administration and support services.
- Sub-sector niches highlight a generally lower value economy, with the key niches being in preserving of meat (a quotient 11 times the national level) and a range of manufacturing activities, mainly lower down the value chain.

Small concentration of creative industries around Bury St Edmunds

- Mapping work completed for the Greater Cambridge Partnership in 2008 revealed a small concentration of creative industries around Bury St Edmunds. [Map 6]

A high and increasing jobs density and high business density, supported by higher than average levels of employment among businesses

- A high density of businesses is crucial in creating the levels of agglomeration required to enable effective knowledge flow between people and firms, important for the growth of any successful economy.
- In 2012 there were 4,985 local units in VAT and/or PAYE based enterprises in St Edmundsbury, and there were around 68,000 total jobs in 2011.
- In 2012, business density in St Edmundsbury was higher than the regional and national averages and has increased since 2004.
- Businesses in the district are generally larger than across Greater Cambridge, and England as a whole, with only Cambridge City (within Greater Cambridge) having a larger proportion of businesses in the 10-49 and 50-249 employment size brackets.
- With a jobs density figure of 0.98 in 2011, the district's labour demand is approximately equal to its available workforce. This figure is the second highest in Greater Cambridge, and is higher than regional and national jobs density figures. This will be partly the result of St Edmundsbury seeing high growth in total jobs between 2003 and 2011, second only to South Cambridgeshire with Greater Cambridge.

Low birth rate of new enterprises and low levels of self employment suggests a lack of competition between firms

- The birth rate of new enterprises (measured as births per 100 active enterprises) in St Edmundsbury was the lowest across the Greater Cambridge area in 2011, and lower than the national rate – a similar pattern to that seen for per capita new business registrations.
 - The proportion of enterprises with employment less than 50 showing employment growth was around 14% in 2008, very similar to regional and national figures.
 - Around 16% of St Edmundsbury's resident population is self-employed – one of the lowest proportions seen across Greater Cambridge.
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Business development, infrastructure and housing

Relatively low affordability of housing

- The average house price in St Edmundsbury in Aug 2012 to Jan 2013 was £231,105.
- The lower quartile house price to lower quartile income ratio for St Edmundsbury as a whole is very similar to that of the East of England. St Edmundsbury has a ratio of 9.76 compared to 9.73 for the region.
- The least affordable ward in the district is Wickhambrook ward, with a ratio of 13.86. Moreton Hall is the most affordable ward in the district, with a ratio of 7.10, which is still greater than the 3.5 house price to income ratio defined as affordable by Communities and Local Government. [Map 5]

High proportion of business space allocated to warehouse and factory space

- In terms of total business floorspace in 2008, St Edmundsbury had one of the highest proportions of warehouse and factory space across all Greater Cambridge districts with nearly 75% of all business floorspace allocated for these uses. This is nearly 15 percentage points more than the proportion seen nationally.
- Only 9% of business floorspace is allocated for office use, half the national proportion.

Slightly higher accessibility of jobs by sustainable means, compared with Cambridgeshire districts

- Accessibility of jobs by public transport, cycling or walking is relatively low across Cambridgeshire, as it is in many other rural counties.
- A slightly higher percentage of residents of St Edmundsbury are classed as being able to access employment by public transport, cycling or walking than the rural Cambridgeshire districts.

Fuel poverty is an issue for the district, as reflected by CO2 emissions per capita being the highest among Greater Cambridge districts

- Fuel poverty is a particular problem in St Edmundsbury; most areas within the district have higher rates of fuel poverty than either the sub-region or the country as a whole.
 - CO2 emissions per capita are particularly high in St Edmundsbury, and the district has the highest rate of emissions per capita across Greater Cambridge. Furthermore, St Edmundsbury was the only district in which a rise in carbon emissions per head was recorded between 2008 and 2009.
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Future prospects

Increase in employment

- The East of England Forecasting Model forecasts that among the Greater Cambridge districts, St Edmundsbury will see the fourth highest total employment increase between 2011 and 2031.

Increase in GVA

- GVA growth forecasts suggest total growth of GVA in St Edmundsbury will be the fourth highest among the Greater Cambridge districts between 2011 and 2031.

Employment demand in caring personal service occupations

- Occupational forecasts for Suffolk based on the East of England Forecasting Model estimate that over the next five years expansion demand is likely to be strongest in:
 - Caring personal service occupations
 - Managers and senior officials
 - Associate technical and professional occupations
 - Professional occupations
 - Sales and customer service occupations

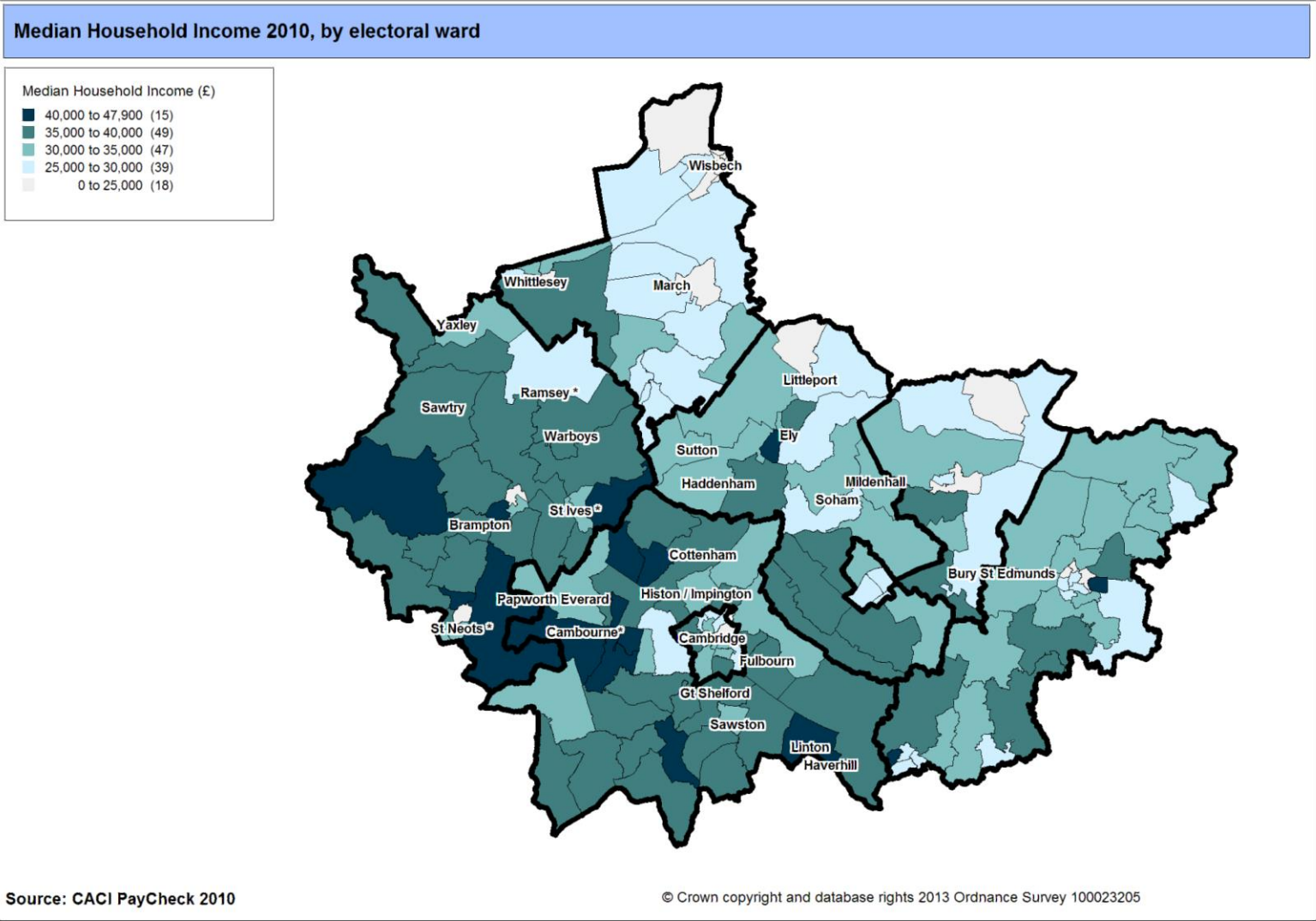
Gradually ageing population

- Forecast levels of population growth to 2031 anticipate a lower rate of population growth than that seen across the sub-region as a whole; a large part of the population growth is anticipated to be in the population aged 65 and over.
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Appendices

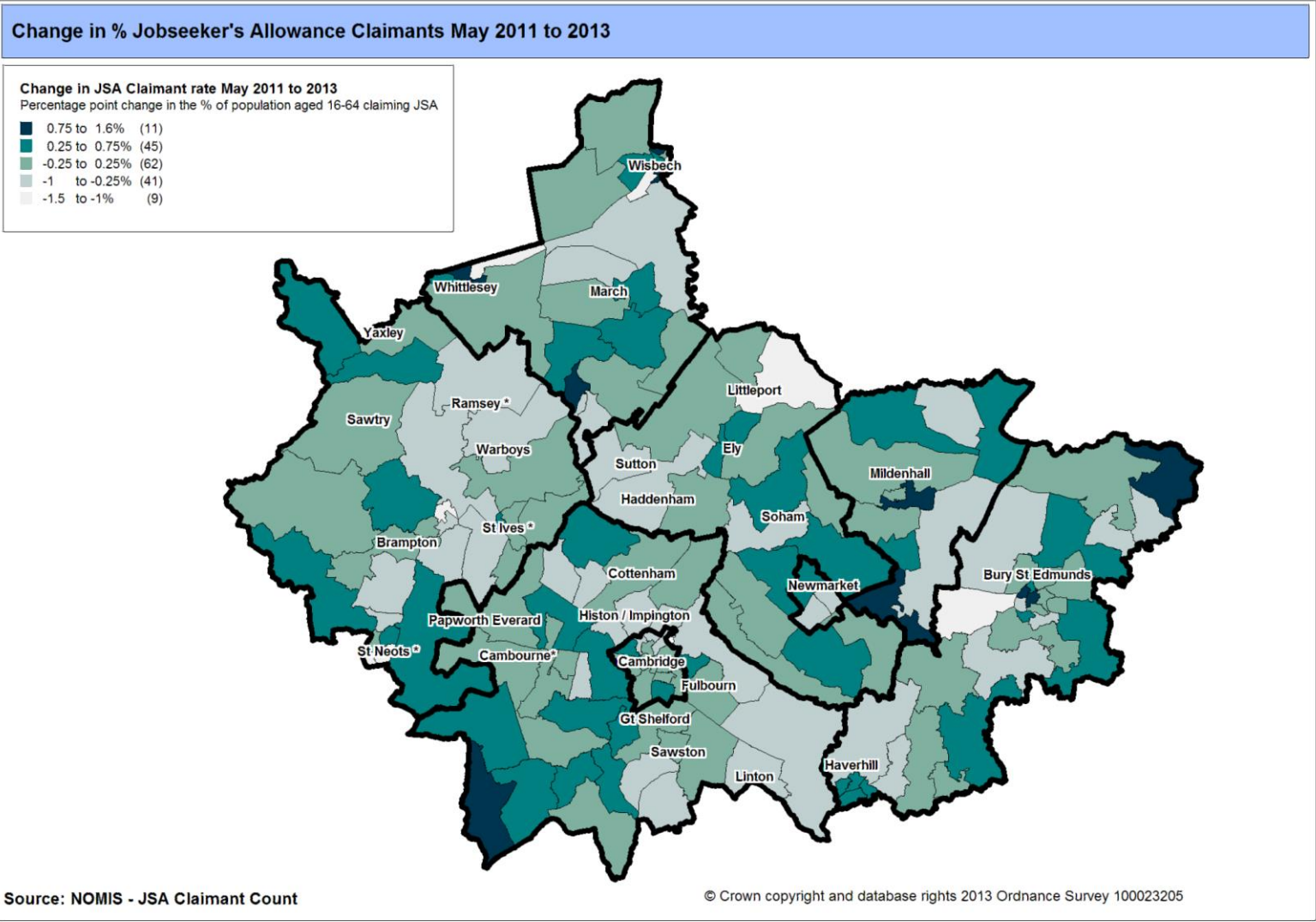
Map 1: Median household income, 2010

Source: CACI PayCheck 2010



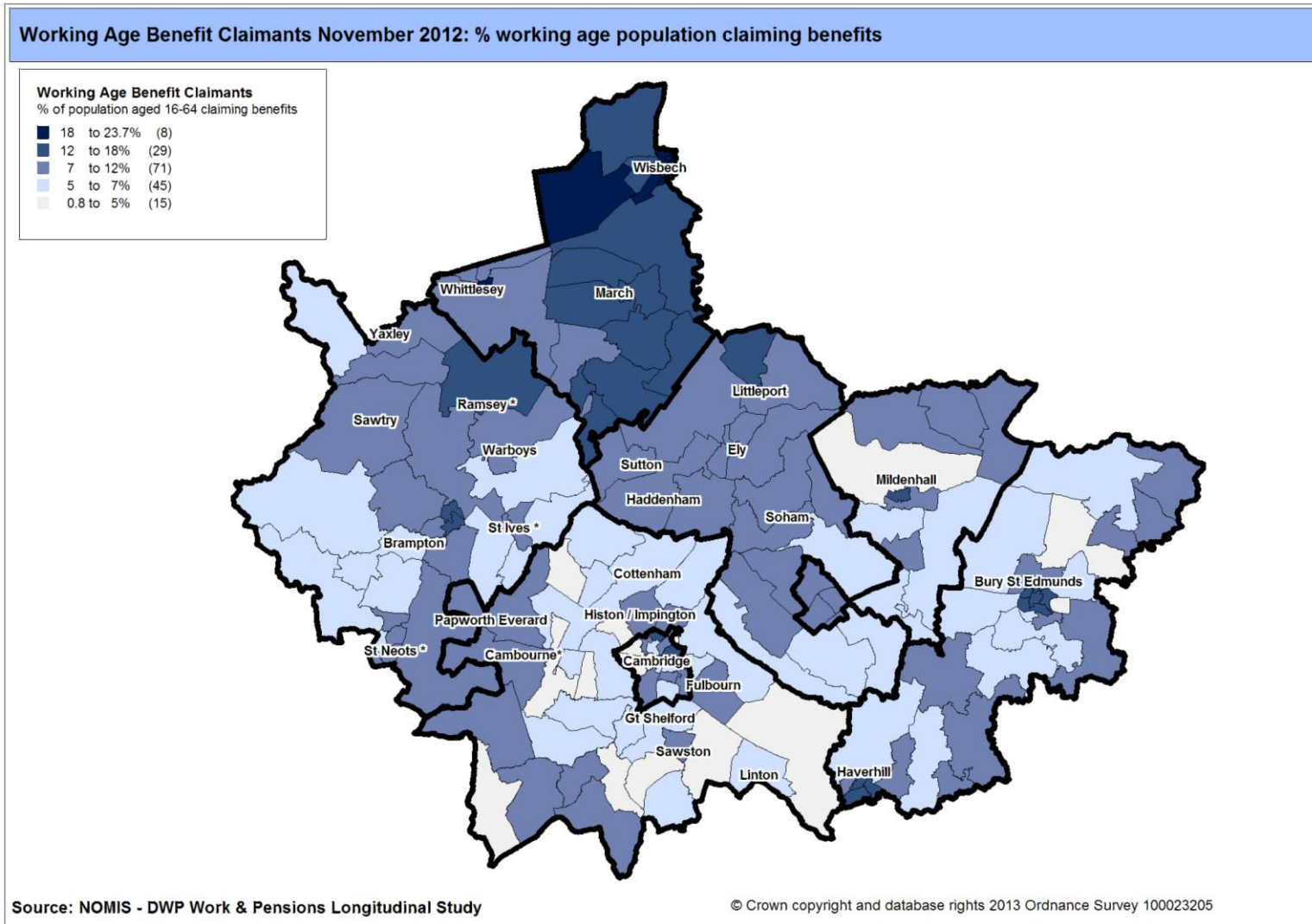
Map 2: Change in percentage Jobseeker's Allowance claimants, May 2011 to 2013

Source: Nomis - JSA Claimant Count



Map 3: Working age benefit claimants, November 2012

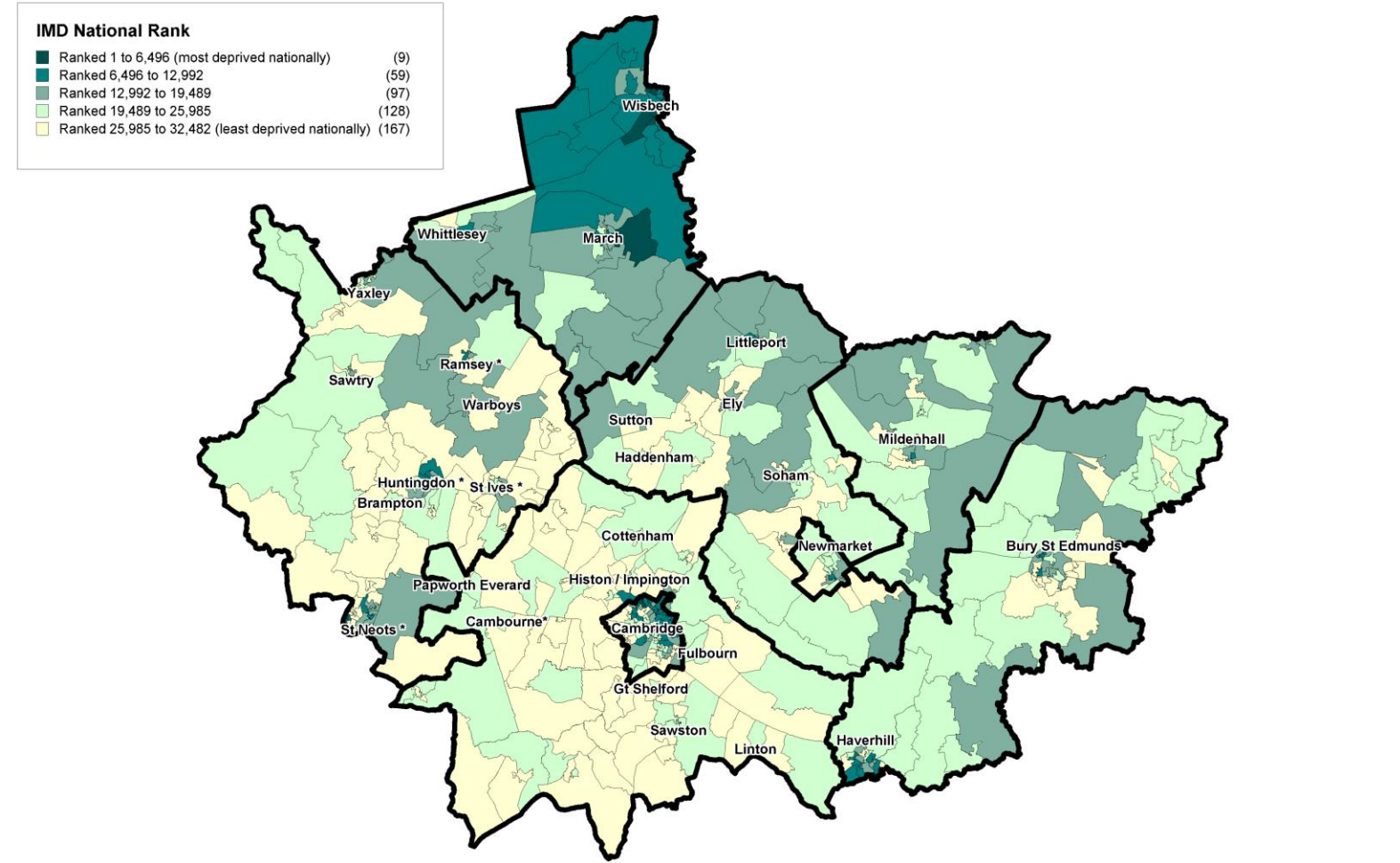
Source: Nomis - DWP Work & Pensions Longitudinal Study



Map 4: Index of Multiple Deprivation, 2010

Source: CLG ID2010

Indices of Deprivation 2010: Index of Multiple Deprivation, rankings relative to England

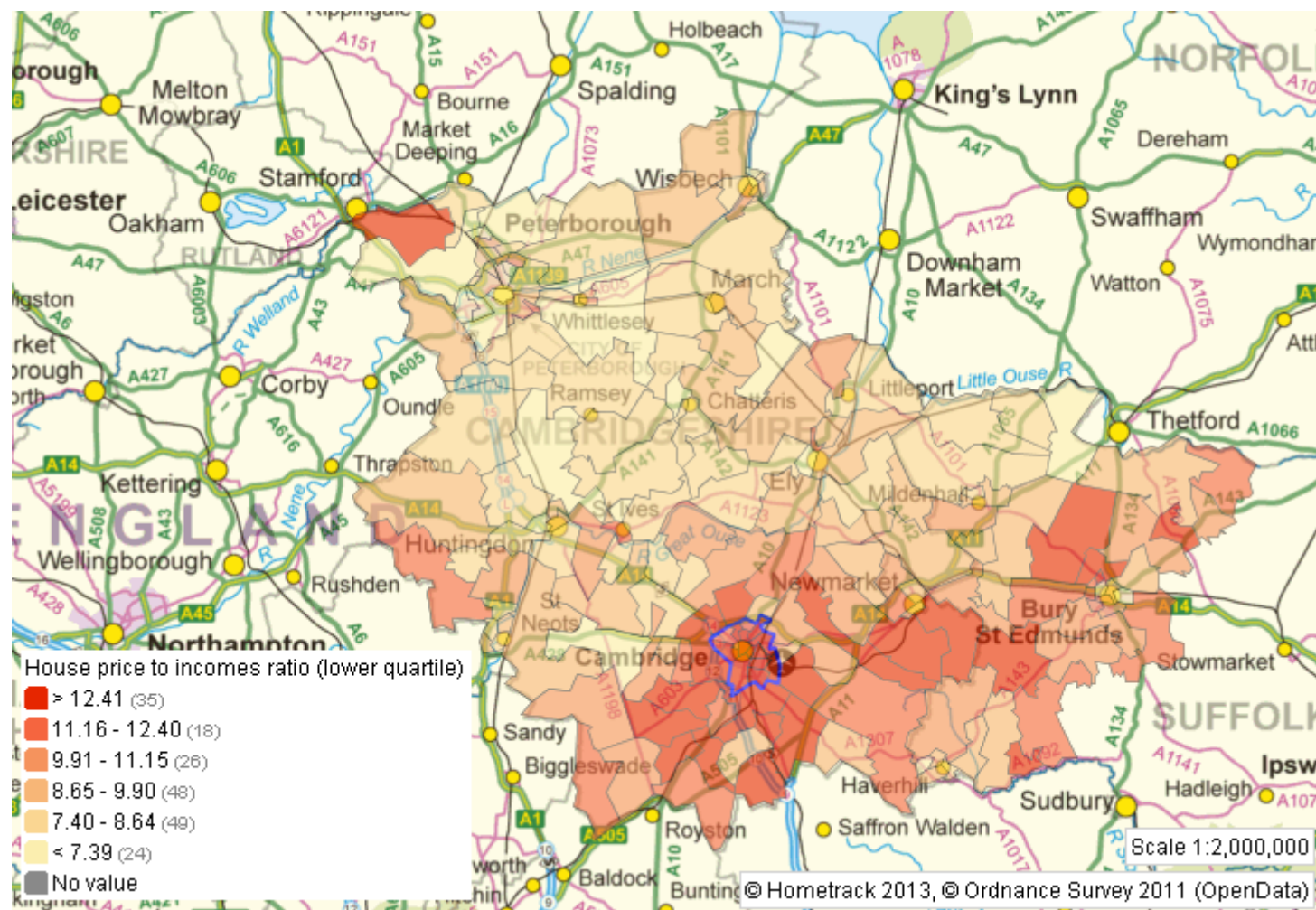


Source: CLG Indices of Deprivation 2010

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Map 5: Lower quartile house price to lower quartile income ratio by ward

Source: Hometrack



Map 6: Creative Industry Businesses across Greater Cambridge

Source: GCP Creative Industries Strategy and Action Plan (2009)

