



July 2016

# Norwich Economic Barometer



**NORWICH**  
City Council

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## Business news

### Economy

**Britain's trade deficit narrowed more sharply than expected in April after a record monthly jump in goods exports**, offering a hint that a weak recent trade performance may be turning a corner. The Office for National Statistics (ONS) said Britain's total trade deficit narrowed to £3.29bn in April from a downwardly revised £3.5bn in March, its lowest level since September 2015.

Goods export volumes jumped 11.2 per cent on the month, the biggest rise since records started in 1998, taking the total value of goods exports in April to £26.1bn, not far from an all-time high set in June 2013.

**UK business confidence fell to a three-month low in May**, according to the Lloyds Bank Commercial Business Confidence Barometer summarised in Figure 1. The overall sentiment index, which combines business prospects and economic optimism, declined 6 points to 32 per cent.

This was the second consecutive monthly fall and suggests that economic growth may slow further in Q2. The policy implications, however, are likely to be limited as the Bank of England Monetary Policy Committee has stated that it would act more cautiously than usual to data releases ahead of the upcoming referendum.

To put this month's results into context, overall sentiment remains above the level in February of this year amid heightened financial market volatility related to concerns about global growth prospects. Overall sentiment also remains well above levels during the global financial crisis of 2008-09 and the subsequent euro sovereign debt crisis.

The decline in overall sentiment was seen in both consumer services and other services sectors. In contrast, the industrial sector continues to show resilience, with sentiment improving in manufacturing and construction.

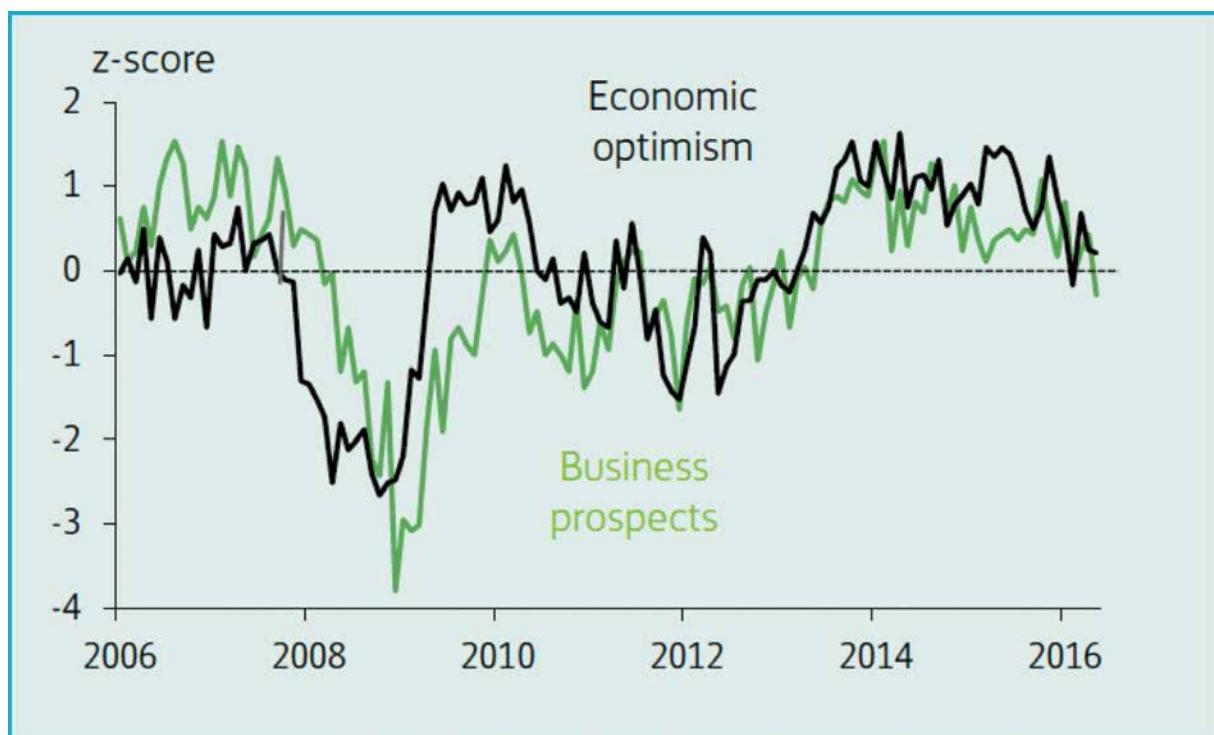


Figure 1 Lloyds Bank Commercial Business Confidence Barometer

**The UK's inflation rate, as measured by the Consumer Prices Index, was unchanged in May at 0.3 per cent.** The ONS said the rate was kept low as a fall in the price of clothing offset rising transport costs. The ONS reported that the main upward pressure on the inflation rate came from transport costs, which rose by 0.9 per cent between April and May, partly due to higher diesel costs. However, offsetting this was clothing and footwear prices, which dropped 0.2 per cent between April and May, while food and drink prices fell 0.4 per cent.

Figure 2 shows the **UK manufacturing sector maintained its generally lacklustre start to 2016.** At 50.1 in May, up from 49.4 in April, the seasonally adjusted Markit/CIPS Purchasing Managers' Index (PMI) edged only negligibly back above the neutral mark of 50.0.

Production volumes were broadly unchanged during the latest survey month, as the growth rate of new order inflows remained subdued (albeit slightly quicker than in April). Where an increase in new business was registered, this generally reflected a further increase in new work from domestic clients.

In contrast, the level of new export business fell for the fifth consecutive month. Where weakness in new order inflows was reported, manufacturers linked this to softer global economic growth, challenging exchange rates and ongoing client and market uncertainties. The latter partly reflected what was the forthcoming EU referendum. According to a special question added to the survey this month, over a third of respondents have seen a detrimental impact on their business from uncertainty regarding the forthcoming vote.



Figure 2 Manufacturing Markit/CIPS Purchasing Managers' Index (PMI)

**ONS figures show that UK manufacturing output grew at the fastest pace for nearly four years in April.** Manufacturing output grew by 2.3 per cent in April, the biggest monthly rise since July 2012. The pharmaceutical industry helped to drive the increase, with output in the sector up 8.6 per cent. That was the biggest increase since February 2014. The official output figures contrast with the recent PMI survey that had indicated weak growth in the manufacturing sector. The chief economist at Markit warned that the revival suggested by the official figures could be short-lived. He said: “Even the ONS cautioned about reading too much into the buoyancy hinted at by the data, the monthly data are often volatile and April was no exception”.

**The UK service sector continued to expand in May,** according to the latest PMI survey data from Markit and CIPS

given in Figure 3, but the rate of growth was one of the weakest seen over the past three years. The rate of expansion nevertheless picked up from April’s 38-month low and expectations for activity over the forthcoming 12 months strengthened.

Where firms held positive outlooks for activity, this was partly dependent on the outcome of what was the forthcoming EU referendum, uncertainty surrounding which, was found to have adversely affected more than one-third of companies. The Business Activity Index rose to 53.5 in May, from April’s 38-month low of 52.3, indicating a slightly stronger rate of growth in UK services output. Activity has risen every month since January 2013. But growth remained weak both in the context of the current upturn and the historic survey trend. The index has averaged 55.2 since it was first compiled in July 1996.

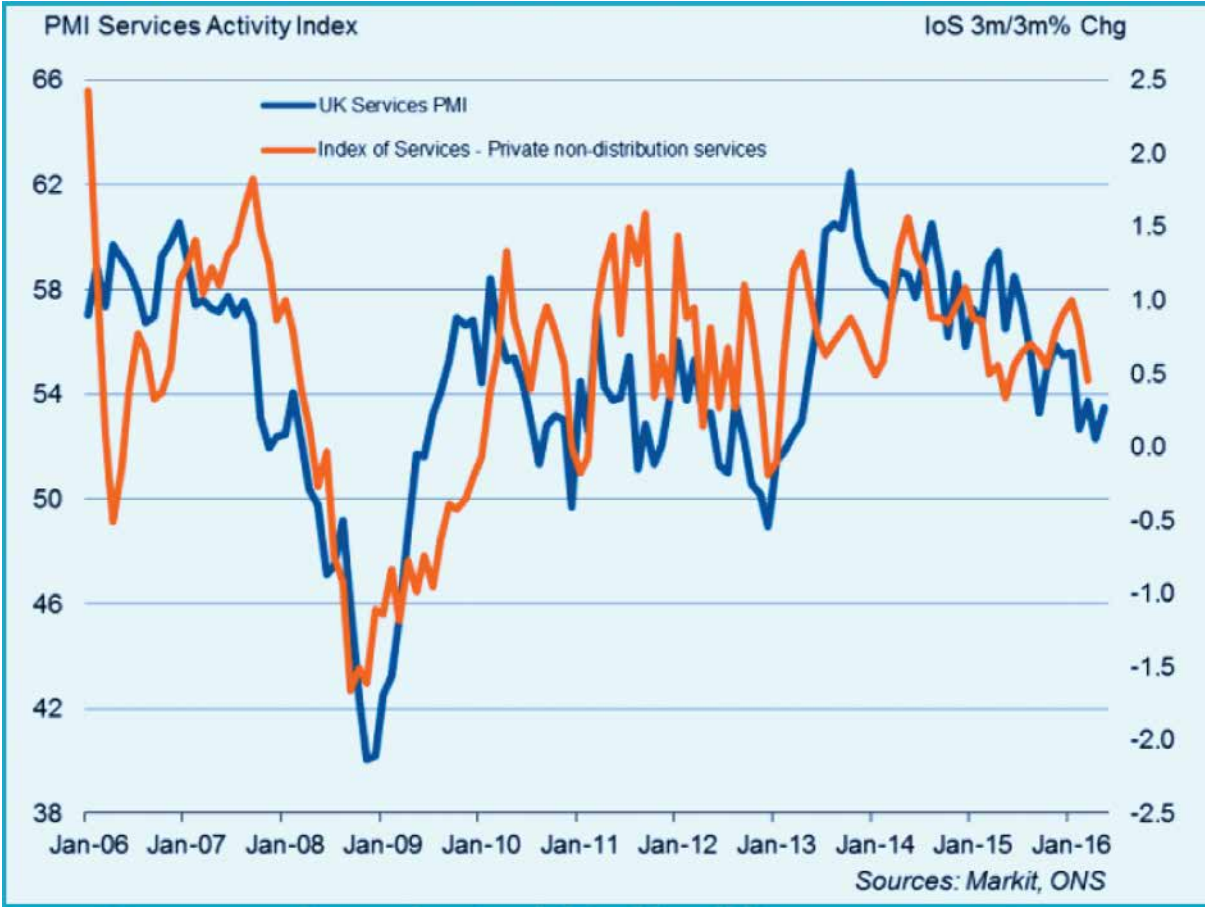


Figure 3 Services Markit/CIPS Purchasing Managers' Index (PMI)

**UK construction firms experienced another difficult month overall in May**, with output growth easing to its weakest for almost three years and incoming new work declining for the first time since April 2013.

Survey respondents noted a general slowdown in market conditions and delays to client decision making ahead of the EU referendum. However, there were signs that construction companies remain relatively upbeat about the growth outlook, with 51 per cent expecting a rise in output over the next 12 months and only one-in-seven (14 per cent) anticipating a fall.

As a result, job creation picked up in May and reached a four-month high. The Markit/CIPS UK Construction PMI posted 51.2 in May, down from 52.0 in April and only slightly above the critical 50.0 no-change mark. The latest reading shown in Figure 4 signalled the weakest overall rise in business activity for almost three years. All three broad areas of construction activity were stuck in a low gear during May.

Residential building work increased at one of the weakest rates seen since early 2013, while growth of commercial activity was the slowest for nearly three years. Civil engineering stagnated in May, which made it the worst performing sub-category of activity for the second month running.



Figure 4 Construction Markit/CIPS Purchasing Managers' Index (PMI)



Figures from the jobs search engine Adzuna point to a **slowdown in pay and new job opportunities**. The total number of advertised jobs in April dipped 0.3 per cent from March to 1,156,810. That figure, however, was still up 12 per cent on a year earlier. The site, which aims to list every job on offer in the UK, noted a particular deterioration in job prospects for new graduates. There were 12,850 entry-level jobs advertised in April this year, down 8 per cent on a year earlier, Adzuna said. The average entry-level salary dropped to a 30-month low of £23,309.

The hiring platform Catapult says **the UK is suffering from an 'absenteeism crisis' in the workplace**. It warned that small and medium enterprises are most affected by employee absenteeism, which includes both 'genuine' and 'non-genuine' absences taken off work. UK businesses are losing 6.9 days a year per employee due to the absenteeism trend, while 23 per cent of UK firms report non-genuine absence as their top cause of short-term time off work for non-manual workers, according to research from the CIPD.

**Pay growth overall remains fairly muted**, against a backdrop of the introduction on 1 April of the National Living Wage, readings for the 3 months to April confounded expectations of a further slowdown. Growth in average weekly pay (including bonuses) held at a 2 per cent annual pace. As bonuses tend to distort the headline total pay measure at this time of year, trends in stickier regular pay are arguably the more important metric – but excluding bonuses, regular pay growth picked up more markedly, rising to 2.3 per cent from an upwardly revised 2.2 per cent last month.

**The number of mortgages taken out by landlords buying new properties plummeted by 85 per cent in April**, following the introduction of a new stamp duty rate on second homes. Figures from the Council of Mortgage Lenders (CML)

showed 4,200 buy-to-let loans were taken out for purchases during the month, worth £600m. Borrowing by landlords purchasing properties spiked in March as investors tried to complete deals before new rules on stamp duty came into effect on 1 April. Since that date, buyers of any kind of residential property other than their main home have had to pay a three percentage point surcharge.

**Retail sales volumes rose by 0.9 per cent month on month in May after an upwardly revised surge of 1.9 per cent in April**, much stronger than expected. The rolling quarterly growth picked up to 1.5 per cent from 0.9 per cent last month, leaving it above the 1.3 per cent recorded for 2016 Q1. With retail sales volumes up by 6 per cent on a year ago, today's data continue to provide visceral reassurance that consumers are likely to remain the key driver of growth of the UK economy in 2016.

A Commons Science and Technology Committee report has warned that **urgent action is needed to deal with the UK's digital skills crisis**, or it risks damaging the country's productivity and competitiveness. It is thought 12.6 million adults lack basic digital skills, while 5.8 million have never used the internet at all. The report stated: "Stubborn digital exclusion and systemic problems" with education and training need to be urgently addressed. It urged the government's digital strategy to be published without delay.

**Consumer spending rebounded in the region in May**, rising by 3.4 per cent as spring weather helped to lift spending on the home, clothes and entertainment. The rise contrasted with weak numbers for the region in March and April and is the second-highest level seen this year, according to data from Barclaycard. Spending in restaurants rose 13 per cent in the region and was up 10 per cent in hotels. But although May's figures mark a return to stronger spending growth, the three month rolling average, at just 2.4 per cent nationally, compares with 3.9 per cent last year.

## Business

**New figures released by StartUp Britain show that in Norwich, 521 companies were formed in the first five months of 2016**, compared to 1,149 for the full year of 2015. Norwich formed part of StartUP Britain's 30-stop tour across the country, aiming to provide inspiration and support to thousands of budding business owners. Parking the bus in public squares and high streets, StartUp Britain recruits local entrepreneurs and experts to come on board and give free, impartial advice to anyone wanting to start or grow a business.

**Extremis Technology will face a panel of judges in the hope of winning the Virgin Media Business, VOOM competition and the possibility of investment.** Extremis Technology, based at Hethel Engineering Centre near Norwich, specialises in humanitarian shelters, measuring 19sq m and designed to last 15 years. It has already handed shelters to families living in slums in the Dominican Republic, and a school in earthquake-hit Nepal is next on the list. And if it wins the latest award, it will secure a four-day Necker Island leadership event in 2017, called Disrupting for Good, six hours of mentoring and workshops with Virgin Unite.

**BHS will close down with the likely loss of 11,000 jobs after time ran out to agree a sale of the chain**, its administrators have said. They will now begin the orderly wind down of the BHS business, which includes stores in Norwich, Ipswich, Great Yarmouth and Lowestoft. Expressions of interest have already been made by retailers keen to move into the Norwich store, known to be one of the chain's better performing outlets. The shop was in the top tier of stores when BHS attempted a mass renegotiation of rents with landlords in a bid to stave off administrators, who were finally called in in April.

**Leading law firm, Howes Percival, has moved into its new £3m home in Norwich's historic Cathedral Close quarter.** Howes Percival's new development combines 17th-century history with modern office facilities on the site of the former Bussey's Ford dealership on Bedding Lane. Named Flint Buildings, it is the largest new office development in the city centre for five years. Work has been taking place to integrate the refurbished building at 1-2 St Martin's, which is Grade II-listed and dates back to the 17th century, with the construction of a new three-storey building, with open-plan offices, conference facilities and meeting rooms.

**Norwich digital media agency, Curveball Media, has managed to improve staff wellbeing and productivity by moving to a six-hour day.** Employees at Curveball Media arrive between 8am and 11am and so long as their projects are on track, are free to leave after their six hours are done. The system was introduced after a month-long trial, during which staff felt the freedom improved their wellbeing and productivity.

Norwich City Football Club has announced that **the former Jarrold Stand at Carrow Road will be renamed as the South Stand sponsored by The Galway Roast.** The Galway Roast will be sponsoring the South Stand, while also supplying their coffee to all hospitality areas and match day kiosks inside Carrow Road. The Galway Roast opened its first store in the UK in Norwich on May 20 on London Street.

**A top-level turnaround at Norwich-based Lintott Control Systems is beginning to pay off, with almost £1m of investment on the table following a major 'reinvention'.** The manufacturer made a £1.3m loss on £10m of sales in 2012, but under new leadership is returning a profit and launching ambitious growth plans.



The Bowthorpe company, which supplies water treatment systems to companies including Anglian Water, is now eyeing 39 per cent growth year-on-year, and plans to grow its workforce by 19 per cent.

**Grant Thornton has won the ‘accountancy firm of the year’ for larger clients at the FDs’ Excellence Awards.** It is the fourth time in the last seven years that the firm has won the award, which is based on a survey of over 1,850 finance decision-makers. The firm achieved a nine out of ten score rating.

**Norwich-based Virgin Wines, which employs 150 people, is set to reach the £40m turnover mark this year,** with thousands of customers switching to online sales each year. Now the company, which changed hands in a £15.9m management buy-out backed by Mobeus Equity Partners and Connection Capital in 2013, wants to become the Interflora of the wine world. Chief executive Jay Wright, who has been at the company for eight years, also wants wine bank – where customers pay into a fund and earn 20 per cent on extra – to be at the heart of the business.

**CT Capital has been handed a £2.3m fine for ‘serious failings’ relating to its handling of historic Payment Protection Insurance (PPI) claims.** The Financial Conduct Authority (FCA) issued the fine to Norwich-based CT Capital after thousands of customers missed out on payments between 2011 and 2013.

CT Capital, based in Duke Street, is the parent company of a group of lenders and loan brokers and was responsible for handling PPI complaints on behalf of the group. Its group of subsidiaries includes Central Trust.

**Majestic Wine has seen a spike in sales for the full year after the firm was boosted by its takeover of online rival, Norwich-based Naked Wines.** Revenues rose 41.3 per cent to £402m as the firm said its ‘transformation’ plan under new chief executive in Rowan Gormley was beginning to pay off.

## Education

**A record number of students graduated from the Norwich University of the Arts.** For the first time, the university held its degree ceremonies over two days, to cope with the growth in the number of graduates. Nearly 570 students graduated with degrees in the arts, design and media on the 7 and 8 June 2016, receiving their awards from the university’s Chancellor, actor Sir John Hurt, at The Halls.

**The University of East Anglia (UEA) and Sunway University (Sun-U), Malaysia have signed a Memorandum of Co-operation (MoC).** The MoC builds on the growing relationship between the two universities and will enable students from Sun-U to spend two years at UEA to complete their studies in BSc Economics, BSc Business Economics and BSc Actuarial Science in the Faculty of Social Sciences and Faculty of Science.

## JSA Claimant Count Unemployment

Figure 5 shows the trend in JSA claimant count unemployment since 2012. Rates have fallen noticeably since the beginning of the period; this has been especially

marked since spring 2013. The rate in the Norwich City Council area started the period significantly above the national, regional and New Anglia LEP rates. During the past year the gap narrowed and this month, the Norwich rate is marginally higher than the national rate.

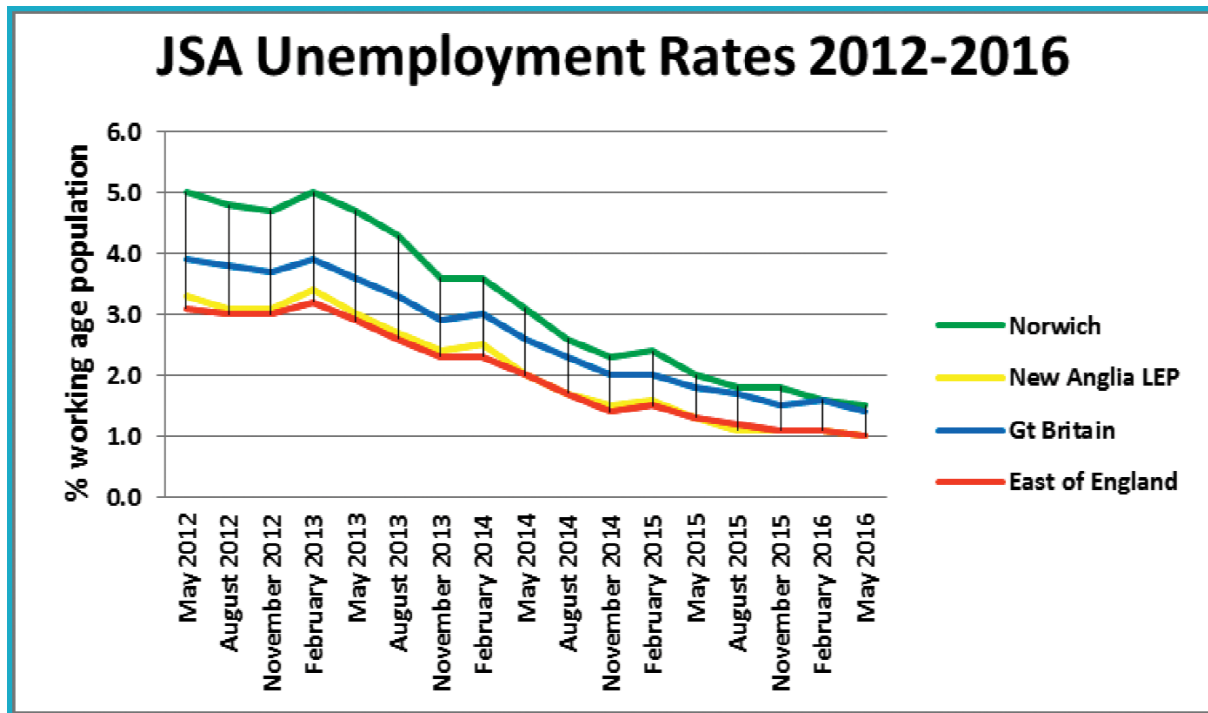


Figure 5 Jobseeker's Allowance Unemployment 2012-16

Table 1	JSA Claimant Count Rate Unemployment							
	May 2015		April 2016		May 2016		Monthly change	Annual change
Great Britain	719,153	1.8%	582,536	1.5%	562,365	1.4%	- 0.1%	- 0.4%
East of England	48,788	1.3%	39,092	1.0%	38,005	1.0%	0	- 0.3%
New Anglia LEP	12,509	1.3%	10,064	1.0%	9,645	1.0%	0	- 0.3%
Norwich City Council area*	1,910	2.0%	1,422	1.5%	1,396	1.5%	0	- 0.5%
Norwich urban area	2,318	1.6%	1,727	1.2%	1,713	1.2%	0	- 0.4%

Table 1 indicates that each reported area saw reductions in JSA claimant count unemployment rates over the year. Compared to March, JSA rates remained unchanged nationally but fell across each of the other reported areas.

\* 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.

## Ward Level JSA Claimant Count Unemployment

Table 2	JSA Claimant Count Unemployment							
	May 2015		April 2016		May 2016		Monthly change	Annual change
<b>Bowthorpe</b>	142	1.8%	98	1.2%	100	1.3%	+ 0.1%	- 0.5%
<b>Catton Grove</b>	182	2.5%	142	2.0%	138	1.9%	- 0.1%	- 0.6%
<b>Crome</b>	128	2.2%	101	1.7%	94	1.6%	- 0.1%	- 0.6%
<b>Eaton</b>	46	0.9%	36	0.7%	36	0.7%	0	- 0.2%
<b>Lakenham</b>	137	2.4%	106	1.8%	92	1.6%	- 0.2%	- 0.8%
<b>Mancroft</b>	263	3.6%	185	2.5%	183	2.5%	0	- 1.1%
<b>Mile Cross</b>	268	3.8%	188	2.7%	201	2.9%	+ 0.2%	- 0.9%
<b>Nelson</b>	52	0.7%	39	0.5%	37	0.5%	0	- 0.2%
<b>Sewell</b>	122	1.6%	95	1.3%	93	1.2%	- 0.1%	- 0.4%
<b>Thorpe Hamlet</b>	185	2.2%	144	1.7%	146	1.8%	+ 0.1%	- 0.4%
<b>Town Close</b>	115	1.5%	79	1.0%	75	1.0%	- 0.2%	- 0.5%
<b>University</b>	71	0.9%	56	0.7%	55	0.7%	0	- 0.2%
<b>Wensum</b>	199	2.5%	153	1.9%	146	1.9%	0	- 0.6%

Compared to this time last year, JSA unemployment rates fell across all Norwich wards. Rates in Mancroft ward fell by more than one percentage point. Over the month, rates in Eaton, Mancroft, Nelson, University and Wensum wards were unchanged. Rates increased in Bowthorpe, Mile Cross and Thorpe Hamlet wards; the remaining wards saw a small reduction in rates.

Figure 6 summarises the movement in JSA claimant count rates across Norwich wards since 2012.

The wide variation in ward rates across the city council area is clearly evident. The differential between the lowest (Nelson) and the highest (Mile Cross) rates currently stands at 2.4 per cent.

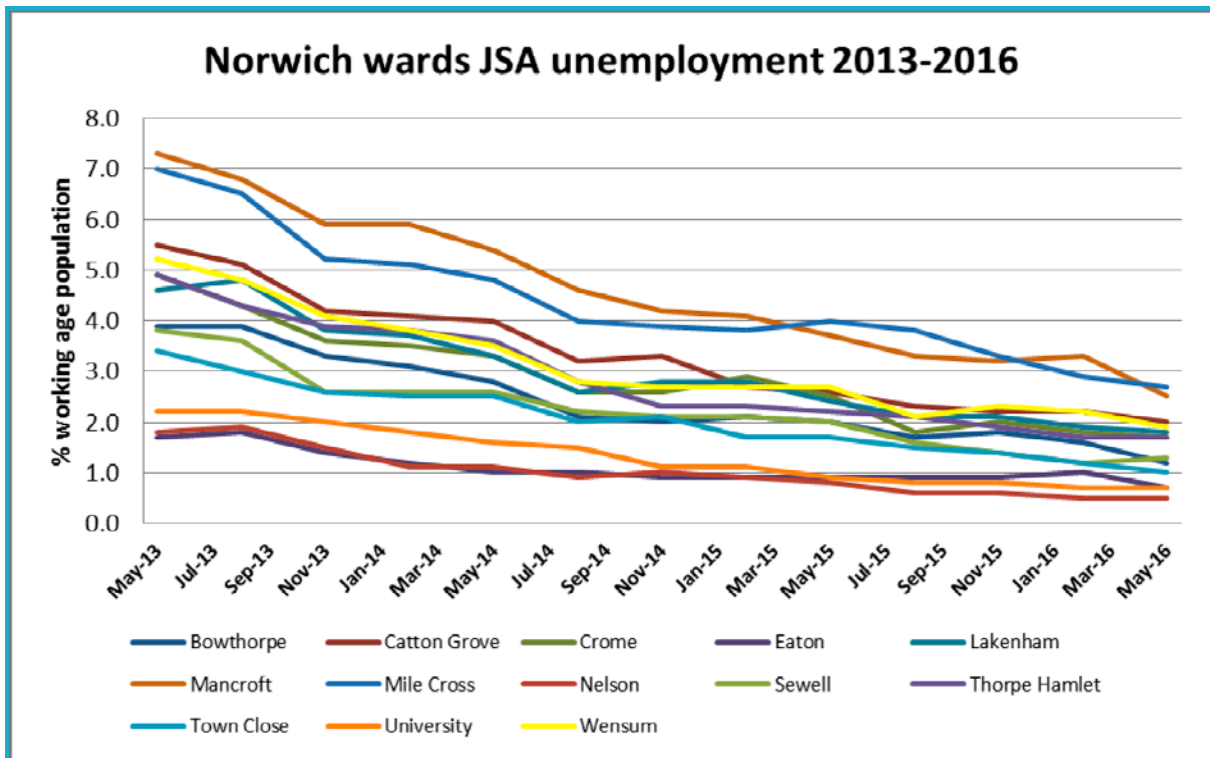


Figure 6 Ward Level Jobseeker's Allowance Unemployment 2012 to 2016

## JSA Claimant Count Unemployment: Age and Duration

**Gender:** in the city council area, one in every three JSA claimants is a woman. Female JSA rates have for the second month running, remained the same across the region (0.9 per cent), the Norwich area (1.1 per cent) and nationally (1.3 per cent); this month the rate was unchanged across the LEP area (0.8 per cent).

The male JSA unemployment rate is higher in Norwich (at 2.5 per cent of working age males) than in the LEP area (1.7 per cent), regionally (1.5 per cent) and nationally (2.3 per cent). Over the month rates saw a marginal fall across the LEP area, regionally and nationally but were unchanged across Norwich.

Norwich's male JSA rate has remained higher than rates in the LEP area and at the regional and national levels since

records began in 1992. The current male JSA rate in Norwich is one of the lowest ever recorded and is now almost on par with 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, which claims a higher proportion of employees (90 per cent) than in the LEP area (83 per cent), regionally and nationally (85 per cent and 86 per cent respectively).

**Duration:** A certain amount of churn is expected within the labour market as people move between unemployment, welfare benefits and employment. Around 53.8 per cent of JSA unemployment claims in Norwich are for a period of less than six months, lower than the proportion seen nationally (54.2 per cent), regionally (59.7 per cent) and for the LEP area (58.5 per cent).

The percentage of JSA claimants who are recorded as being unemployed for more than 12 months stands at 27 per cent in Norwich compared to 24.3 per cent in the LEP area, 23.4 per cent regionally and 28.2 per cent nationally. Relative to the previous month, the percentage of long-term unemployed has increased slightly 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. However, over the year, the number of people recorded as long-term unemployed in Norwich has fallen from 495 people in May 2015 to 360 currently.

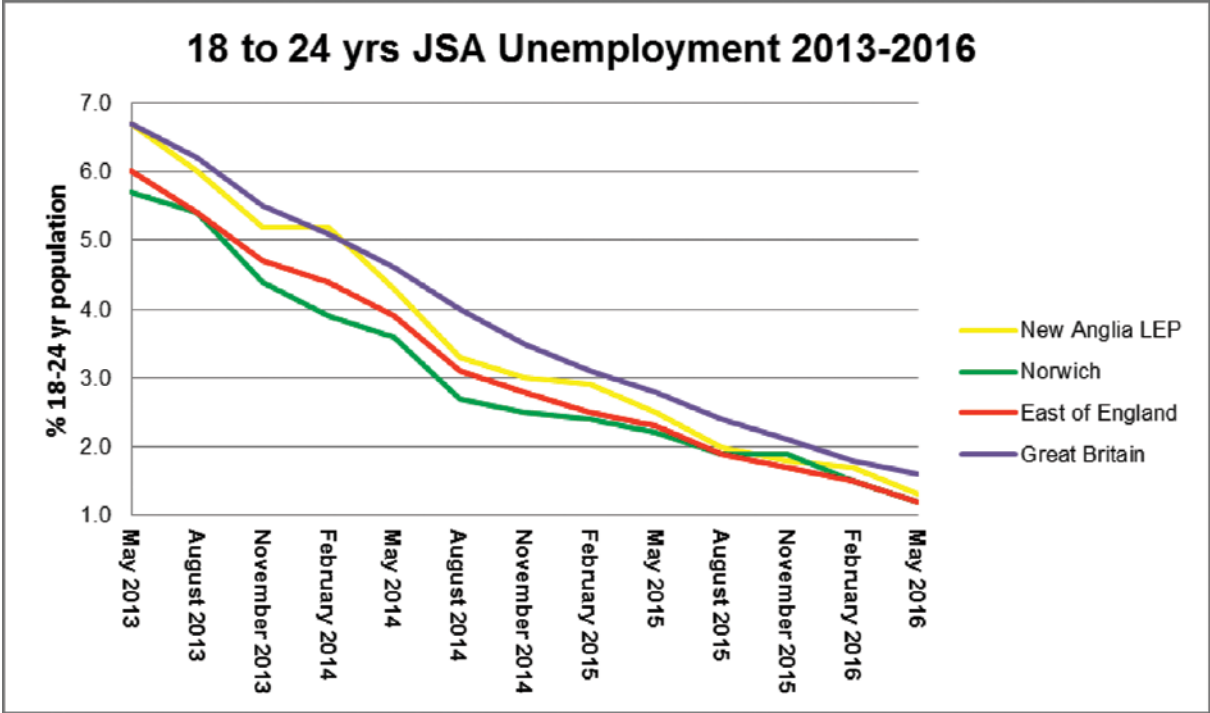


Figure 7 JSA Unemployment 2012 to 2016 for 18-24 Year Olds

**Age:** In Norwich 17.3 per cent (240) of JSA claimants are aged 18 to 24 years, a higher proportion than that seen across the LEP area (16 per cent), regionally (14.9 per cent) and nationally (14.6 per cent). This month, the percentage of JSA claimants aged 18-24 years fell across each of the reported areas.

Eaton, Wensum, Catton Grove, Sewell, Mancroft and Nelson wards have proportions of claimants aged 18-24 years above that of the Norwich average. Mancroft ward has the highest number of claimants aged between 18-24 years (45).

As a percentage of the 18-24 year old age group (rather than as a proportion of JSA claimants), the JSA unemployment rate stands at 1.1 per cent in Norwich and across the region; it is slightly higher across the LEP area (1.2 per cent) and nationally (1.4 per cent). Movement in the JSA unemployment rate over the period 2013 to 2016 is summarised in Figure 7 which shows rates began to fall from 2012 onwards and this trend has continued.

At the other end of the age scale, Norwich has a lower proportion of JSA unemployment claimants aged 50 years and over (25.6 per cent, 360 people) compared to the LEP area and regionally (28.7 per cent) and nationally (27.7 per cent). Against the previous month, the percentage of JSA claimants aged 50 years or more grew slightly across each of the reported areas.



## Universal Credit

Universal Credit is the new type of benefit for people who are on a low income or are unemployed. It merges income-based jobseekers allowance, income support, income-related employment and support allowance, child tax credits, working tax credits and housing benefit; it is currently being rolled out across the UK. Universal Credit went live in Norwich in December 2015. Initially it will only be claimed by single jobseekers with no dependent children.

Norwich Jobcentre Plus has recorded 936 Universal Credit claims to the end of May 2016. Of these, 548 are within the Norwich LA postcode area.

## Housing Benefit

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.

<b>Table 3</b>		
<b>Norwich City Council housing benefit** claimants</b>		
	<b>Number of claimants</b>	<b>Monthly change</b>
<b>May 2015</b>	17,959	+ 34 (+ 0.1 %)
<b>June 2015</b>	18,173	+ 214 (+ 1.2 %)
<b>July 2015</b>	18,308	+ 135 (+ 0.7 %)
<b>August 2015</b>	18,144	- 164 (- 0.9 %)
<b>September 2015</b>	18,114	- 30 (- 0.2 %)
<b>October 2015</b>	18,101	- 13 (- 0.07%)
<b>November 2015</b>	18,009	- 92 (- 0.6 %)
<b>December 2015</b>	17,914	- 95 (- 0.5 %)
<b>January 2016</b>	17,811	- 103 (- 0.6 %)
<b>February 2016</b>	17,679	- 132 (- 0.7 %)
<b>March 2016</b>	17,254	- 425 (- 2.4 %)
<b>April 2016</b>	17,103	- 151 (- 0.9%)
<b>May 2016</b>	17,278	+ 175 (+ 1.0 %)

\*\* Housing benefit numbers include people who are claiming council tax benefit only.

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

Table 3 shows that the number of Housing Benefit claimants in the Norwich local authority area grew by 175 claims during May. Over the year, Housing Benefit claims in Norwich have fallen by 3.8 per cent. Comparable national data is not available because of a time lag in data collection.

## Young People (16-18 years) recorded as Not in Education, Employment or Training (NEET)

The latest update received from Norfolk County Council is that Norwich's NEET figure stands at 6.4 per cent compared to 3.7 per cent at the county level.

# Average House Prices

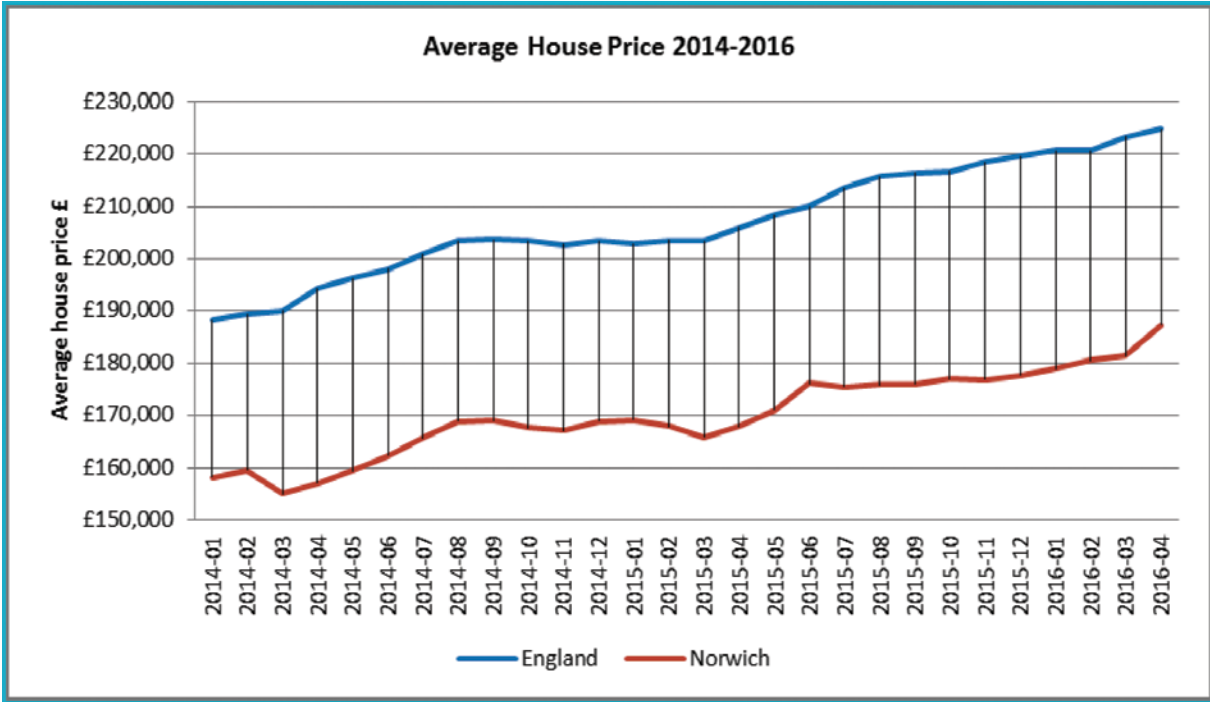


Figure 8 HM Land Registry Average House Prices 2014-2016

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 11.6 per cent in Norwich and by 9.1 per cent across England. Figure 8 summarises average house price movements since January 2014.

During the month of April, average house prices grew by 0.7 per cent in England and increased by 3.3 per cent in Norwich compared to the previous month. The average house price in Norwich currently stands at £187,346 against £224,731 for England.

## Appendix

### Contact details:

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### Data Sources:

Figure 5 – JSA claimant count – NOMIS, Crown copyright

Figure 6 – JSA claimant count wards – NOMIS, Crown copyright

Figure 7 – JSA claimant count 18-24 year olds – NOMIS, Crown copyright

Figure 8 – House Price Index, HM Land Registry, Crown copyright

Tables 1 and 2 – JSA 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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