Public Health & Communities

Suffolk in 20 years – healthy, wealthy and wise?

Summary

January 2025

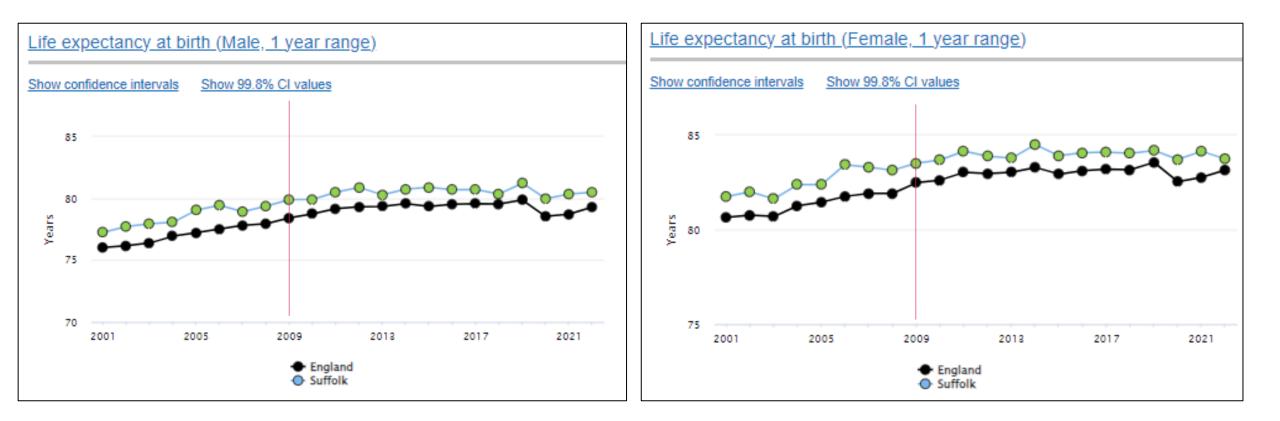
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Suffolk +20 years – What can we say about health and wealth in Suffolk now?

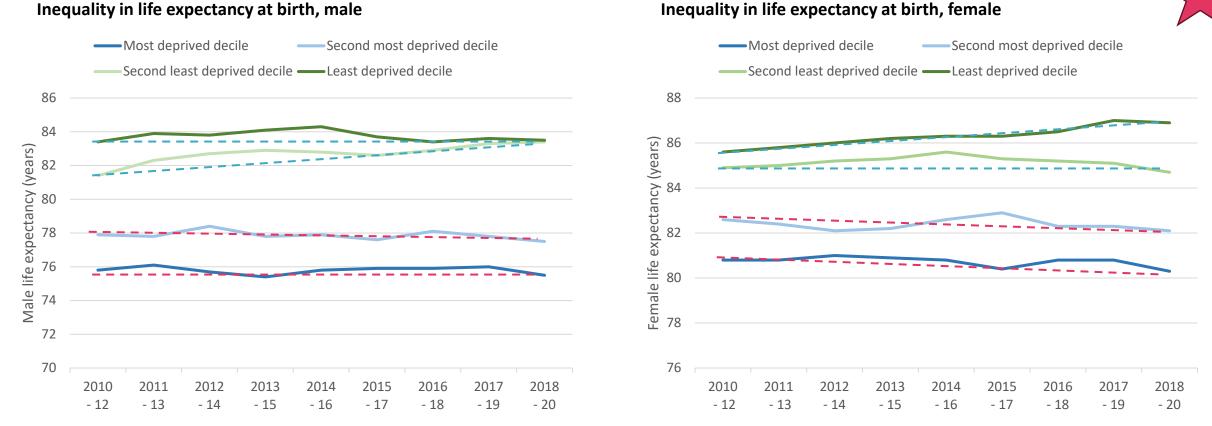


Life expectancy is often considered to be the key indicator of a healthy population. Suffolk's population lives for longer than the England average, with women living longer than men. But life expectancy gains have been minimal since 2009 and Covid-19 has also had a clear impact



Source: Fingertips –<u>Life Expectancy at Birth</u>

Suffolk County Council Public Health The overall life expectancy numbers mask inequalities in life expectancy within our population. The average life expectancy of the most deprived 10% of the Suffolk population has not increased at all since 2010, and appears to be *declining* in the most recent years of data, particularly for women



Data has not been updated, it is pre-pandemic.

Additionally, healthy life expectancy at birth is much lower than overall life expectancy. Males in Suffolk have a healthy life expectancy of 67.0 years, and for females its 64.4 years. This means, on average Suffolk men spend nearly 14 years of life in declining health and Suffolk women spend nearly 20 years in declining health. Compared to 2009-11, healthy life expectancy at birth in Suffolk in 2018-2020 had decreased by 3.7 years for females (68.1 – 64.4) and increased by 1.7 years for males (65.3 – 67.0)

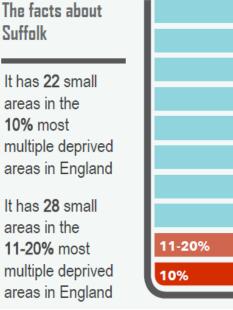
Suffolk Public Health & Communities In 2019 Suffolk was just outside the least deprived third of local authorities in England. We anticipate an updated IMD in 2025. The most recent data suggest unemployment in Suffolk is rising, and claimant counts remain higher than pre-pandemic, but the unemployment data should be treated with caution

Suffolk's Index of Multiple Deprivation ranking, 2019:



Based on the average rank of the IMD rank.

Suffolk is the 53rd least deprived upper tier authority in England out of 151



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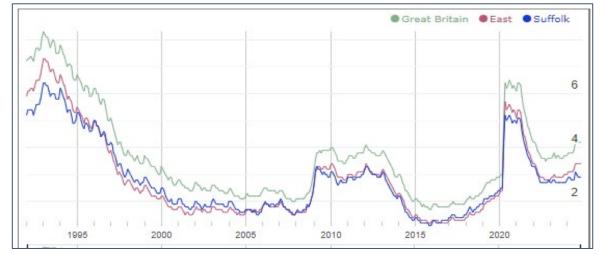
12 of the 22 areas in the 10% most multiple deprived areas of England are in **Ipswich**. The other 10 are all in the Waveney area of East Suffolk (9 in **Lowestoft**, 1 in **Beccles**).

Source: NOMIS June 2023; Public Health Suffolk analysis

• Great Britain • East • Suffolk

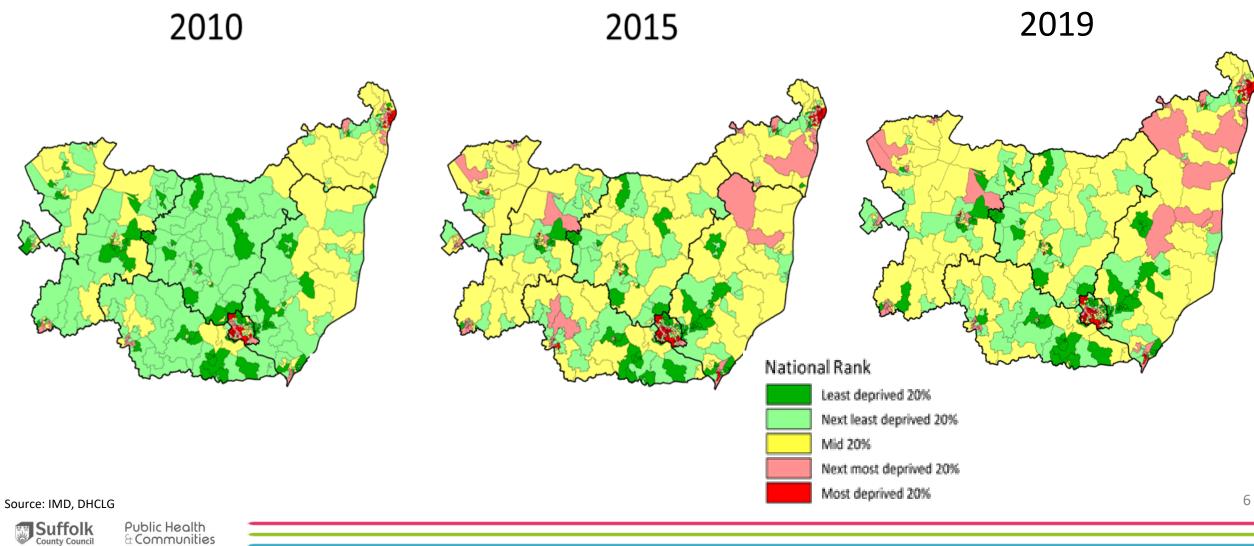
Suffolk, East of England and Great Britain unemployment rates, June 2024

Suffolk, East of England and Great Britain claimant percentages October 2024



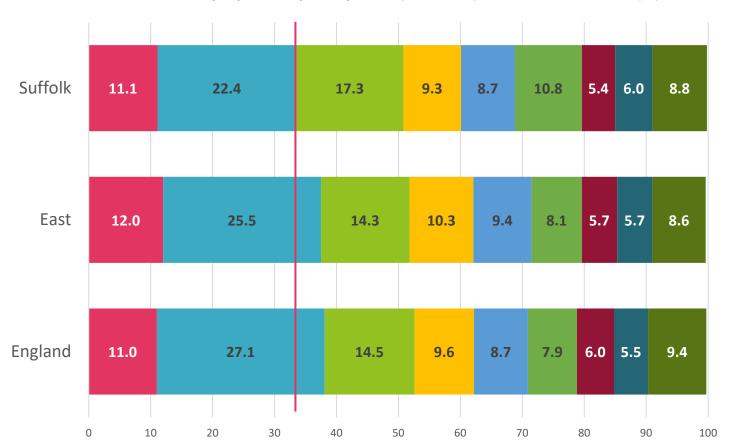


Relative deprivation levels were rising in Suffolk before COVID. Low educational attainment was the key driver of this increase in relative deprivation prior to the pandemic.



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Suffolk residents continue to be less likely to be employed in the highest skilled occupations ...



All in employment by occupation (SOC2020), Jul 2022 - Jun 2023 (%)

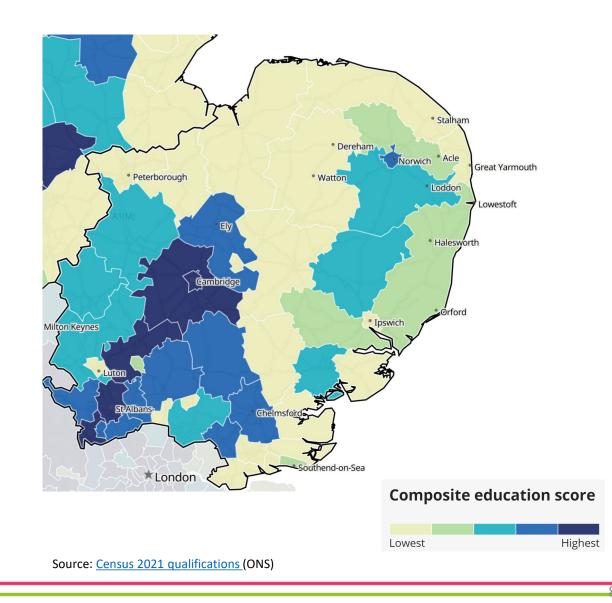
- 1: managers, directors and senior officials
- 2: professional occupations
- 3: associate professional occupations
- 4: administrative and secretarial occupations
- 5: skilled trades occupations
- 6: caring, leisure and other service occupations
- 7: sales and customer service occupations
- 8: process, plant and machine operatives
- 9: elementary occupations

Compared to England, Suffolk has a statistically significant lower percentage of people working in "professional occupations", and a statistically significant higher percentage of people working in "caring, leisure, and other service occupations".

Source: Employment, economy & skills Suffolk summary (data from the Annual population survey ONS via Nomis)

Suffolk County Council & Communities ... and continue to have lower levels of education ...

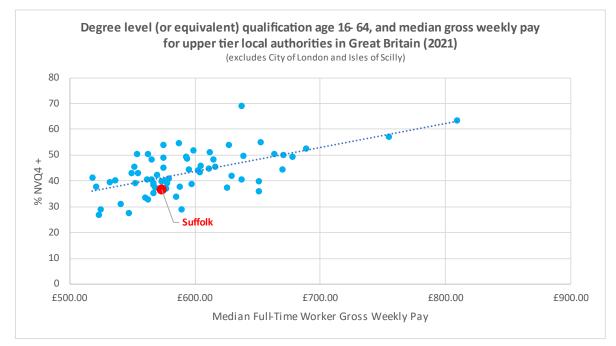
- If professional jobs requiring expert training were readily available in all areas, the distribution of people with high-level qualifications should be fairly even.
- Areas with less-qualified workforces may have a poorer economy, or fewer well-paid jobs.
- Coastal areas struggle to attract and retain highly qualified workers.
- West Suffolk (282) and Ipswich (291) are in the bottom 20% of areas in England for composite education score. West Suffolk's education profile is most similar to Bolton (ranked 20 places higher – better – than West Suffolk).



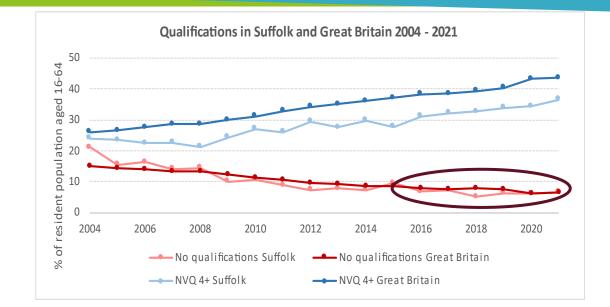
Note: Level 4 qualifications are higher than A levels

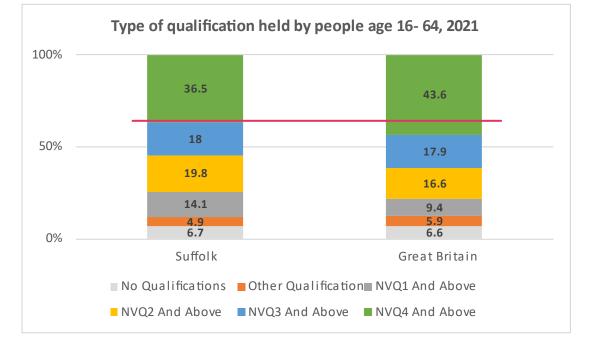
...both these factors contribute to Suffolk having lower levels of gross weekly pay.

- Degree qualifications have been increasing but remain below the national average – this correlates with the low levels of pay in the county
- Suffolk now has similar levels of people lacking any qualifications compared to the national average – this proportion almost halved between 2004 and 2014 but may now have plateaued



Source: Nomis qualifications, Nomis - Annual Survey of Hours and Earnings 2021



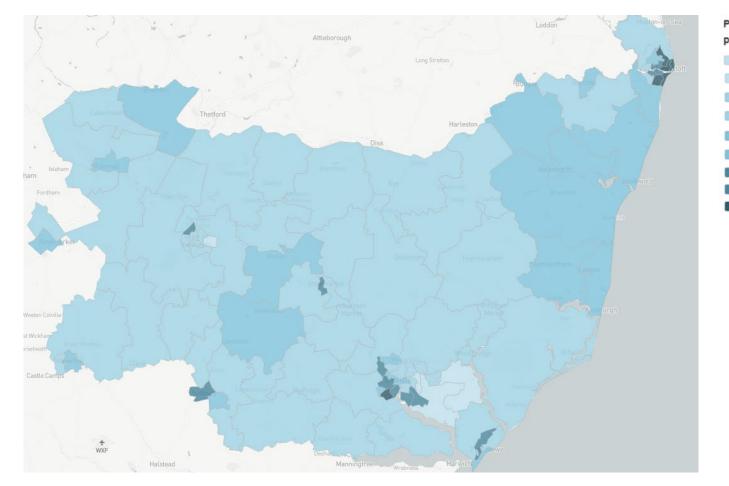


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And there are other indicators which are concerning in relation to children - the number of areas where more than a third of children are entitled to free school meals in Suffolk is increasing

Free School Meal entitlement by Middle Super Output Area (MSOA):



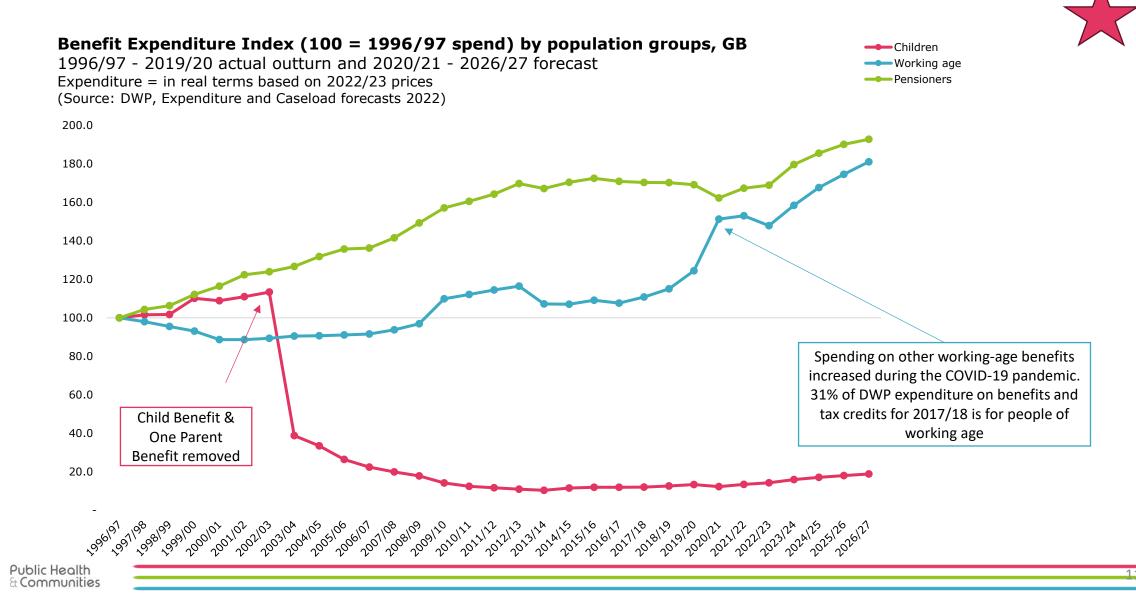
Proportion of pupils on FSM Less than 5% 5% to 9.9% 10% to 14.9% 15% to 19.9% 20% to 24.9% 25% to 29.9% 30% to 34.9% 35% to 39.9% At least 40%

18 areas in Suffolk now have at least30% of their children eligible forfree school meals in the latest data.The areas include parts of Ipswich,Lowestoft, Felixstowe, Bury,Sudbury and Stowmarket.

The annual **household income** threshold to receive free school meals is £7,400 (excluding benefits). The annual full time minimum wage is £22,000 – so many children on free school meals are living in households with very low or no participation in paid work.

Sources: Cost of Living - Healthy Suffolk, Citizens Advice

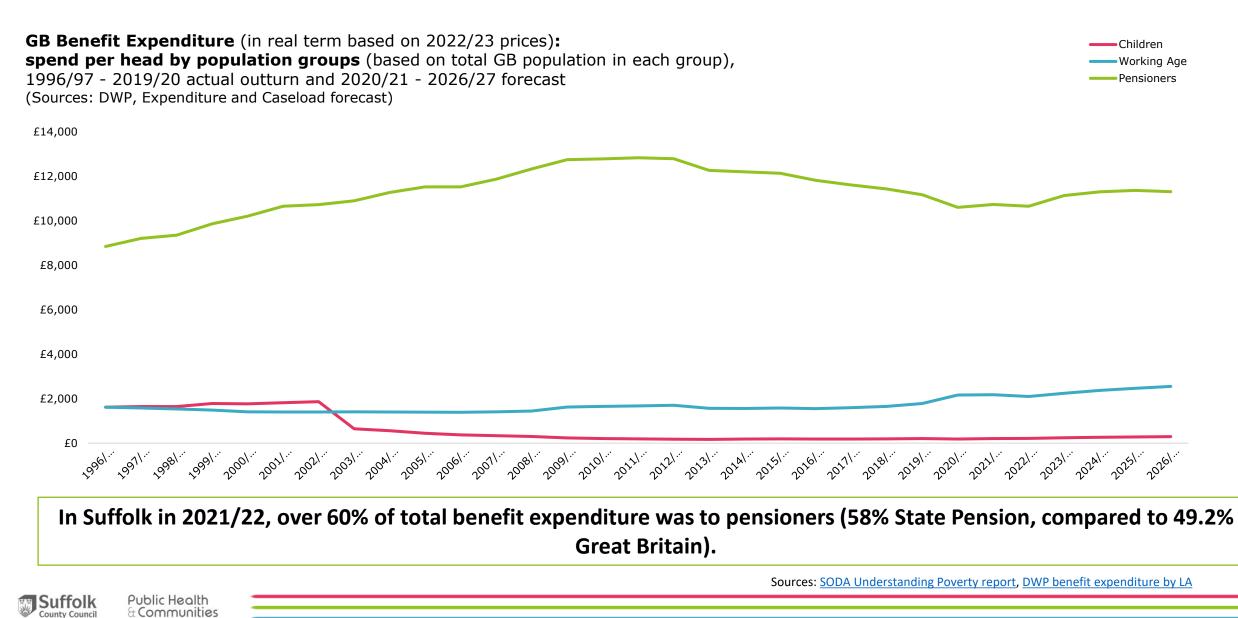
Suffolk County Council & Communities Since the Welfare Reform Act 1996, spending on pensioner benefits has risen continuously, and will continue to do so as the older proportion of the population increases. In contrast, benefit on expenditure for children has dropped sharply since 1996, with small increases forecast over the next few years....



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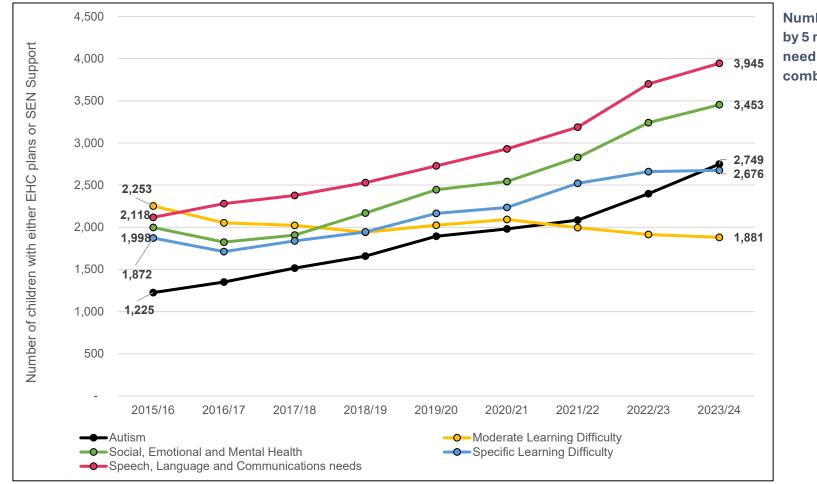
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...and in terms of benefit spend per head, this has increased by +26% for pensioners and +10% for those of working age between 1996/97 and 2019/20, while spend per head for children declined by -87%.



At the same time as national welfare support for children is reducing, children's needs are rising and becoming more complex.

The total EHC plan caseload in Suffolk increased by 66% to 7,860 in 2024 over five years, mirroring national trends; the numbers of children receiving SEN support increased by over 25% during the same period. Between 1998-2018 all-age autism diagnoses in England increased by **787%**, as did the prevalence of other key conditions and risks, suggesting that the demand for services is likely to continue to increase – also note the implications of this for adult social care.



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Number of pupils in Suffolk schools by 5 most common primary type of need (SEN Support and EHC plans combined), 2015/16 to 2023/24

Speech, language and communication

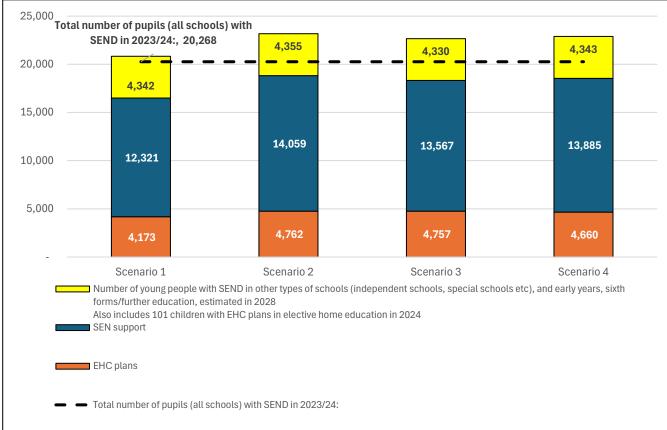
needs are the most common 'primary SEND need' in Suffolk, followed by social, emotional and mental health needs.

The number of pupils with autism as their primary need more than doubled between 2015/16 and 2023/24.

Source: <u>Department for Education</u> (2024)

While there is significant uncertainty around these estimates of future need for SEND services in Suffolk, key factors including unmet historical demand, increasing prevalence of key conditions, potentially rising population level risk factors, the ongoing impact of the pandemic seem likely to point to an ongoing increase in SEND and associated demand for services and support in Suffolk.

Comparison of projections for SEND provision in Suffolk under each of the four scenarios, with estimated number of mainstream school-age children requiring SEN support and EHC plans in 2027/28



Source: Suffolk County Council – School Census Analysis (2024); Department for Education (2024)

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We have modelled four potential scenarios to explore the impact of different rates of change on demand. These scenarios can be expanded and adjusted over time.

- Scenario 1 (static prevalence) projects the most conservative growth to 16,494 children in mainstream settings
- Scenario 2 (recent Suffolk trend of increased SEND cases continuing) demonstrates the most substantial increase to 18,821 children in mainstream settings
- Scenario 3 (Suffolk's prevalence increasing in line with national average increases) projects 18,324 children in mainstream settings
- Scenario 4 (increases in prevalence in line with CSSNBT neighbours average) suggests a projection of 18,545 mainstream school-age children respectively.

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16-17 year olds in Suffolk who are not in employment, education and training

Summary comments for academic ages 16+17		Dec-23		Dec-24	
	Destination type	%	figure	%	figure
As predicted the cohort size continues to increase, 163 up on	Cohort total				
last month and 503 more than at the same point last year.		16128		16631	
Roughly the same number of yp are in a NEET category as last	NEET Total	4.69%	756	4.54%	755
year, but the % is lower due to the cohort increase					
The Year 12 numbers have increased whilst Year 13 has					
decreased. The RONIs for the 2024 leaver gp predicted higher					
NEET for Year 12	NEET Year 12	3.61%	293	3.67%	309
lower Year 13 figure could be partially explained through					
referrals to the Thrive Re-engagement Provision	NEET Year 13	5.78%	463	5.43%	446
	NEET + Re-engagement		821		864
The Unknown figures have reduced substantially since last					
month as PTT chased for more data and both FST and PTT	Unknown total	1.05%	170	1.09%	182
continued individual follow ups					
There are more people in an unknown destination in Year 12.	Unknown Year 12				
This is most likely due to more people needing follow up and an					
increase in yp who are reluctant to respond to follow up such as					
EHE.		0.59%	48	1.19%	100
	Unknown Year 13	1.52%	122	1.00%	82
In Education, Employment and Training	in EET		15202		15694
The trend continues for a lower %' in Learning' for our first					
scorecard month. This is the 1st time it has dipped below 90%	In Learning total	90.10%		89.95%	
so early.					
There are more yp in an Education destination but lower %.	Education	82.86%	13363	82.50%	13721
The increase in training is mainly due to the expansion of WS					
Training; the numbers have increased by 114.	Training		221		335
The biggest increase in Re-engagement numbers is mainly down					
to Year 13 referrals to Thrive by PTT	Re-engagement		65		109
Overall there are fewer yp so far in employment But we can see	Employment - all types	9.63%	1553	9.19%	1529
another increase in work with no accredited training - which is a	Work no training total		605		626
trend we have seen since Covid.	Noncho training totat		000		020

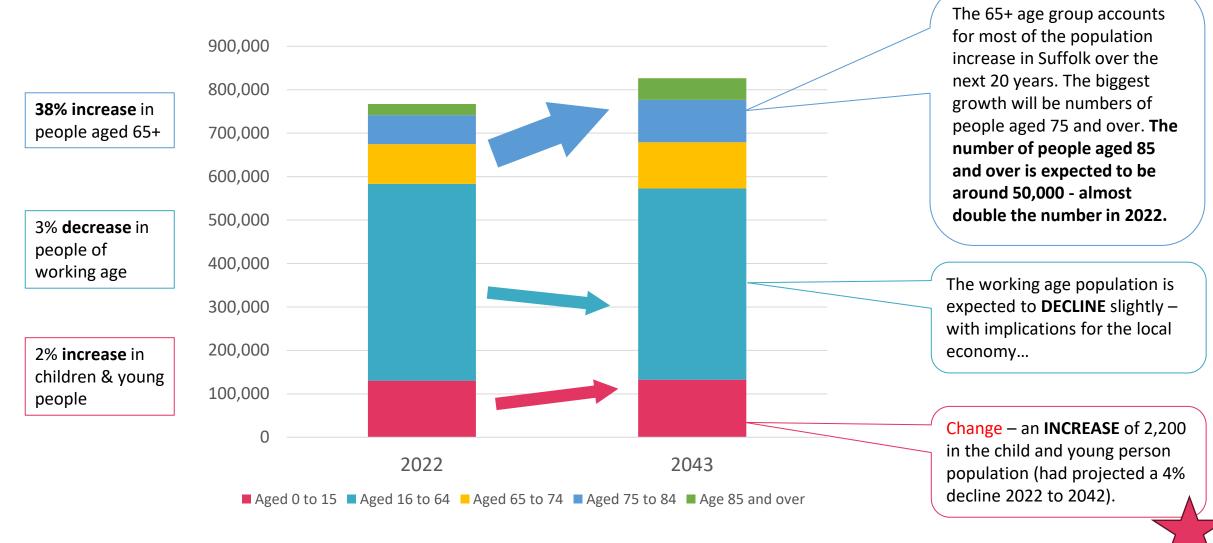
- There are 16,631 young people aged 16-17 this year in Suffolk, an increase of 503 young people in comparison to 2023.
- Suffolk's 'in-learning' figure for young people engaging in education, employment & training is **89.95%.** Whilst this is slightly lower than the same period for 2023, the overall number of young people engaged in a positive activity has increased, to 15,694 (Dec 2023 = 15,202 young people).
- Suffolk has seen a 68% positive increase in the number of young people entering re-engagement activity in December 2024 in comparison to the previous year.
- Suffolk has 755 young people not currently engaged in education, employment or training (NEET) aged 16-17yrs, 4.54% of the total cohort. This figure is similar to the same time last year where Suffolk had 756 NEET young people, equating to 4.69% of the total cohort.
- Suffolk has a low proportion of 'unknowns', which means our data has a high degree of accuracy. Care should be taken when comparing with other areas with higher unknowns rates.

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Suffolk +20 years – How healthy will we be?



Suffolk's total population is projected to increase by nearly 8% over the next 20 years; the key change is that the number of older people is forecast to increase by 38% - keeping pensioners out of poverty is really important for Suffolk, but will this come at the expense of spending on children?

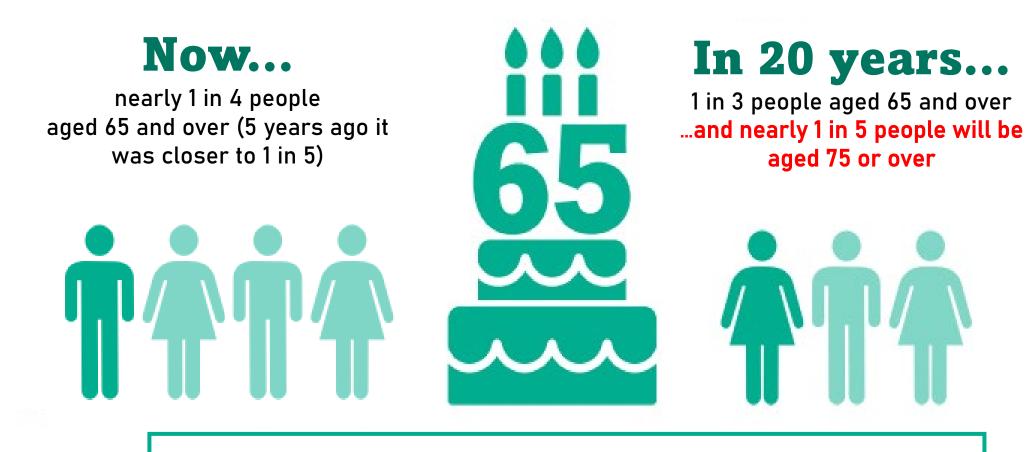


Source: ONS population estimates (2022 released 2023) and projections - local authorities - 2018-based

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Suffolk will have nearly 1 in 3 people aged over 65 and nearly 1 in 5 people aged over 75 in 20 years' time.

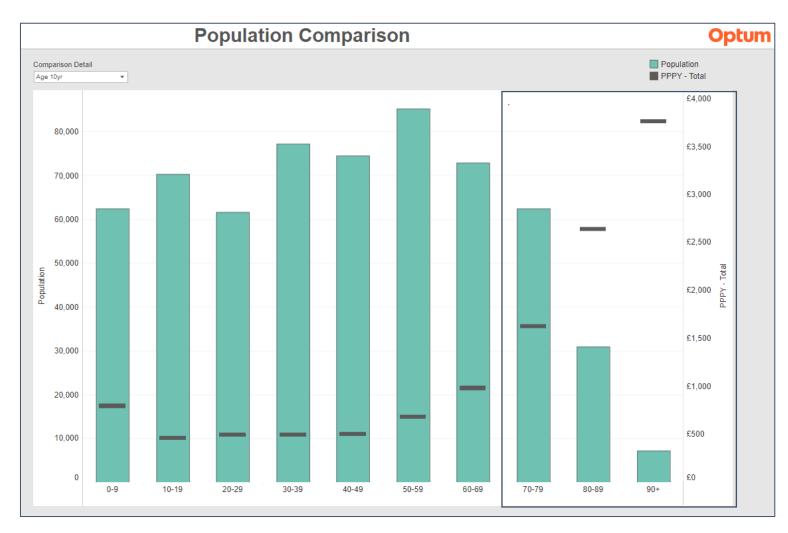


Suffolk's population has aged since the 2011 Census. The **median age** in East Suffolk and Babergh is now 49, while in Ipswich it is 38.

Source: ONS population estimates (2022 released 2023) and projections - local authorities - 2018-based, Census maps

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Public Health & Communities As we age, conditions such as heart disease and diabetes become more common; and some new age-related conditions appear. As there will be more older people in Suffolk in 20 years' time, we can expect many more people with lots of need, and for many people's needs to be more complex.



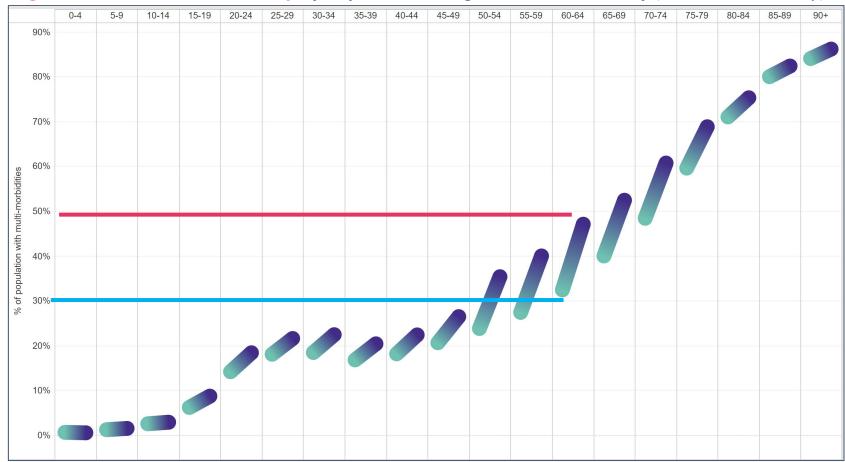
Our new linked dataset clearly shows how the numbers of people in older age bands fall, but the health and care spend per person per year (PPPY – the black lines) increases significantly...

This will be hard to manage in our ageing population unless we become **far more effective at prevention**

Another 25,000 over 85s would cost an additional £75m per year at current cost if nothing else changes

Source: Optum PHM Dashboards, Suffolk population of SNEE population, May '22 – Apr '23

Suffolk County Council Public Health There are also deep inequalities in the distribution of multiple health conditions in our population. People in more deprived communities in Suffolk are already significantly more likely to have a higher number of long-term conditions, particularly in middle age, than people living in less deprived areas of Suffolk.

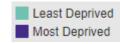


Age of onset of multi-morbidity by deprivation & age - Suffolk data only (excludes Waveney):

People living in poorer areas tend to have multiple health conditions at a younger age compared to those in wealthier areas.

By the time they turn 65, **nearly 50%** of people living in Suffolk's more deprived communities are living with many long-term conditions – a poor preparation for a healthy, independent older age

This is **two-thirds higher than the proportion** with multiple conditions in our least deprived populations

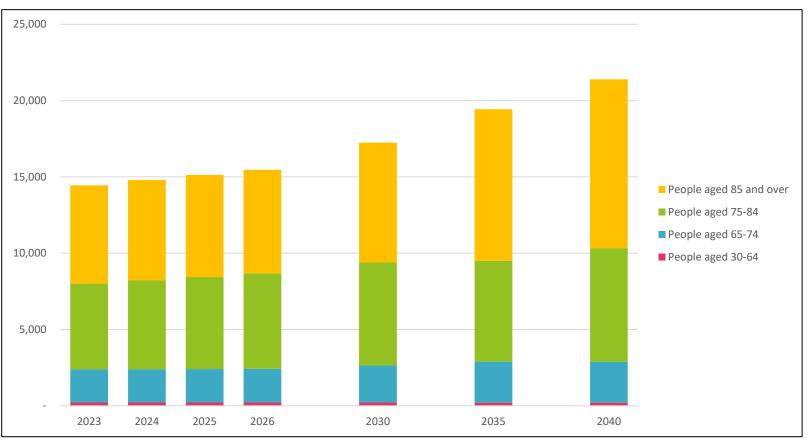


Source: SNEE Optum PHM (Suffolk PCNs)

Suffolk County Council & Communities The number of people living with dementia in Suffolk is likely to increase by nearly half (49%) in the next 20 years; and most of these new cases will be in people aged over 85, meaning their carers may also need significant support.

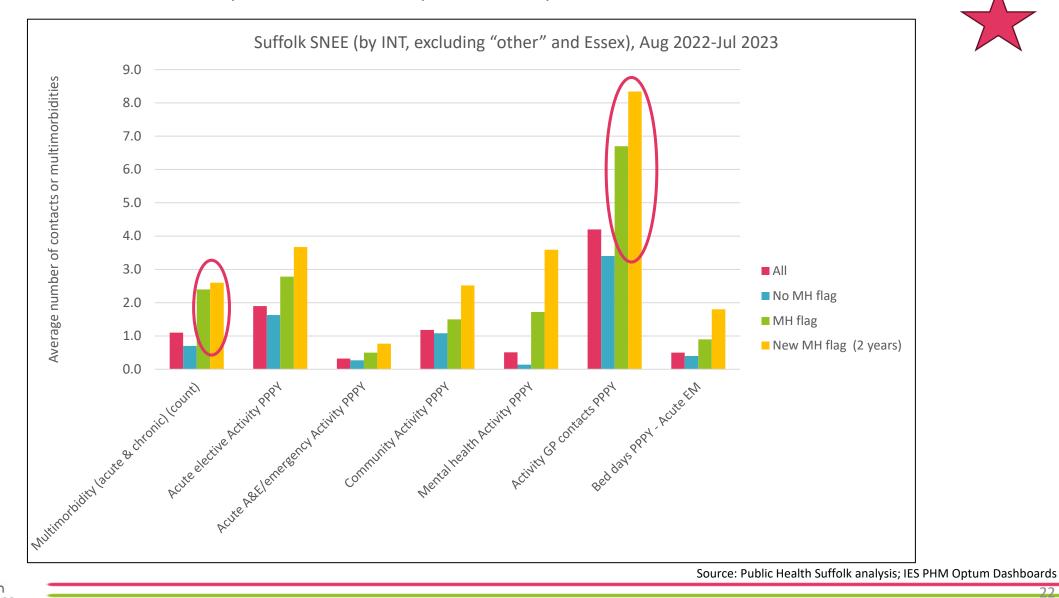
- In 2023, approximately 14,200 people aged 65 and over in Suffolk are estimated to be living with dementia. This is forecast to increase by nearly half (49%) by 2040 to 21,200 people.
- Over half (66.5%) of all cases of dementia in 2040 will occur in those aged 85 or over. This is equivalent to 11,100 people (or around half the population of Sudbury).
- We now know from new data that being diagnosed with dementia is a key 'push' factor into adult social care, and that the needs of many people with dementia are complex – this increasing prevalence is therefore highly likely to increase demand for adult social care, and will be difficult to prevent

Forecast changes in the numbers of people with dementia in Suffolk, by age band, 2023-2040

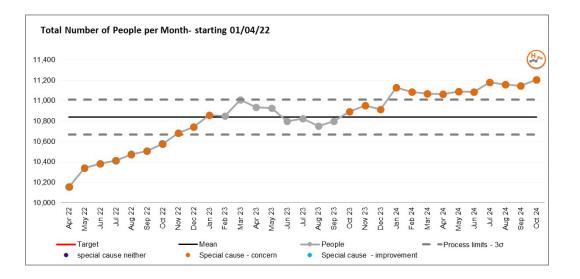


Source: Primary care dementia data, PANSI, POPPI

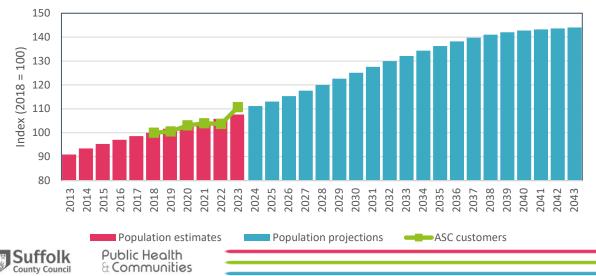
Mental health is also vitally important. Every type of health activity is already occurring at higher rate locally for people with a diagnosed mental health condition compared to those without - having both a mental and physical health condition makes both harder to manage, and the weakness of NSFT may make this more of a problem locally than in other areas.



Public Health Suffolk County Council & Communities Total **ACS customer numbers** over the last three years breached the upper 'control' limit for the most recent three years of data, signifying a change which is not due to chance, in January 2024.



Suffolk population estimates, projections and adult social care customers aged 65+, indexed to 100 (2018 = 100)



Key findings from a recent 'deep dive' into ACS demand include:

- Customers are starting with ASC younger, particularly for home care – this may mean the duration of care required increases over time
- Customers who pay in full for their own care are part of the increase – their numbers are rising
- Mental health customers have increased by 71% since the spring of 2022 – still low numbers overall but the impact of the ending of the Section 75 Agreement continues
- The older population is continuing to increase, and customer numbers which usually track the >65 population quite closely, went above the overall population trend in 2023.
- There is a very clear socio-economic gradient in ACS new customers, partly because of the ring fence. The 20% most deprived areas (IDAOP) contributed 23.5% of new ACS customers in 2023 and 2024, compared to 9.7% for the 20 least deprived areas

Sources: ONS mid-year population estimates, ONS 2018-based population projections, SCC ACS Insight and Intelligence Hus

Suffolk +20 years – what will our communities need?



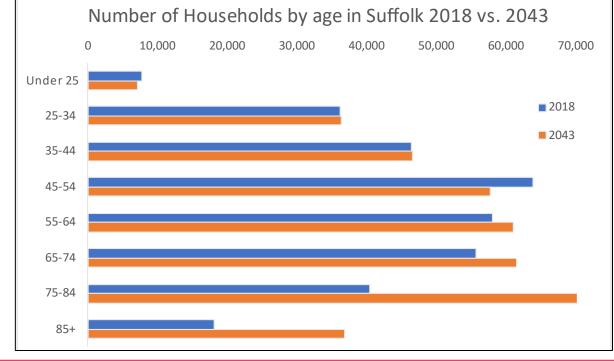
The number of households and demand for dwellings are forecast to increase by 16% from 2018 to 2043 – more than double the rate of population growth - as changes in demographic structure change household composition.

Local Authority	Change 2018-43: Households with one dependent child	Change 2018-43: Households with two dependent children	Change 2018-43: Households with three or more dependent children	Change 2018-43: One person households: Male	Change 2018-43: One person households: Female	Change 2018-43: Other households with two or more adults
Babergh	1. <mark>1</mark> %	0.4%	1.2 <mark>%</mark>	27.9%	3 <mark>2.7%</mark>	21.5%
East Suffolk	2.9%	-1.1 <mark>%</mark>	-1. <mark>0</mark> %	<mark>2</mark> 5.1%	34.9%	24.9%
Ipswich	-5.5%	-11.0%	-12.7%	6.9%	13.0%	7.7%
Mid Suffolk	-12.7%	-13.0%	-12.8%	36.8%	44.6%	29.9%
West Suffolk	-0 1%	-5.4%	-4.7%	16.6%	25.2%	13.6%
Suffolk	-1.7%	-5.5%	-5.4%	20.8%	30.0%	19.9%

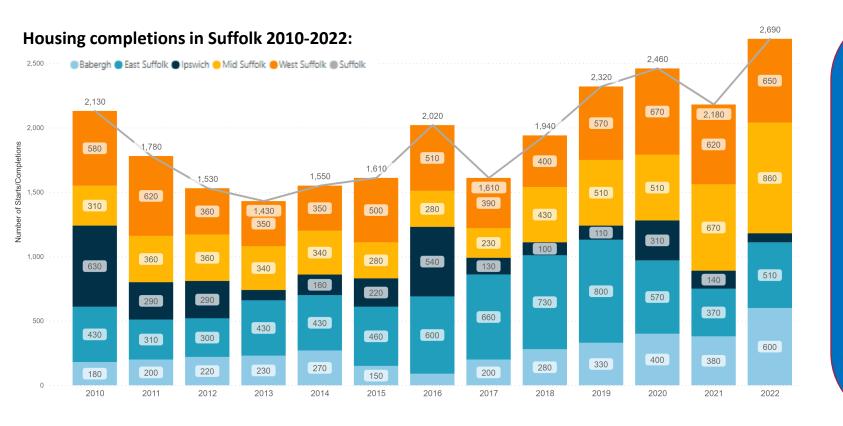
Key Trends

- More older households
- Biggest proportional increases are among singles and shared households (couples with other adults and 'other' household types).
- The number of households with dependent children will decrease (4%), whilst the number of households with no dependent children will increase (22%).
- More smaller households what might that mean for personal, neighbourhood and community resilience?

Source: ONS: Household projections for England, Suffolk housing summary



The latest (2021) Housing Delivery Test measurement was published by DLUHC in 2022. This is an official, annual measurement of housing delivery by relevant plan-making authorities (i.e. in Suffolk by LTLA). The latest figures show Suffolk overdelivered on the number of homes required...*



...but – are these the right homes? Median Suffolk house price is now 9.71 times median salary, higher than national ratio (2021)

if we don't build more affordable homes, or control rents, some estimates suggest that, in 20 years' time, 40% of people aged 40 or below will still be living at home with their parents....

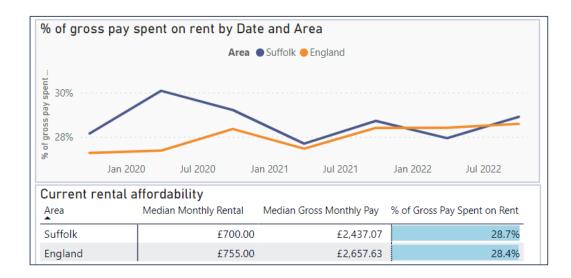
Do you know how many people are on Suffolk housing waiting lists? Or how many of these new homes are 'affordable'?

For 2018-21 (latest figures), the total number of houses required across Suffolk was 7,950. 9,426 were delivered (119%). Ipswich was the only Suffolk planning authority that did not exceed the test: 82% (n=950) of required homes were built, a shortfall of 208.

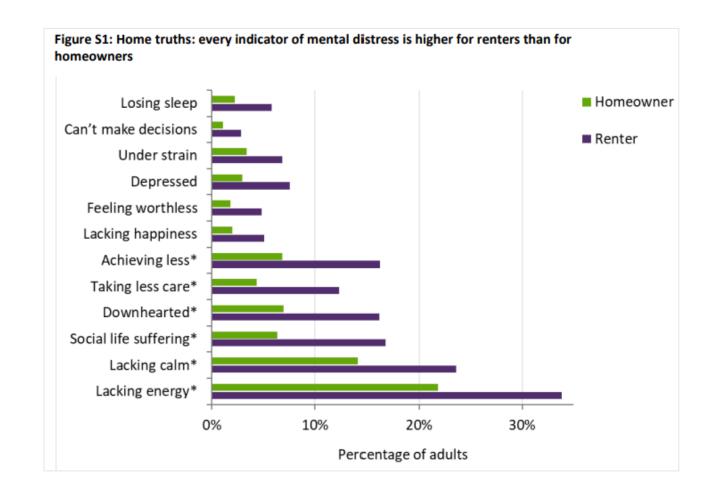
Source: Institute for Public Policy research, Britain in the 2020s, December 2016; DLUHC housing delivery test, Suffolk housing summary

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In Suffolk, the number of households buying with a mortgage has dropped by 9% since 2011, while private renters have increased by 29.5%... Spend on rents as a proportion of pay is rising, and renters have higher levels of mental distress than homeowners



- On average people in Suffolk spend 28.7% of their gross pay on rent now similar to average levels and going up
- But the Suffolk figures conceal variation in West Suffolk renters spend an average of 41.1% gross pay on rent.



Source: Anxiety nation? Joseph Rowntree Foundation, cost of living and depression

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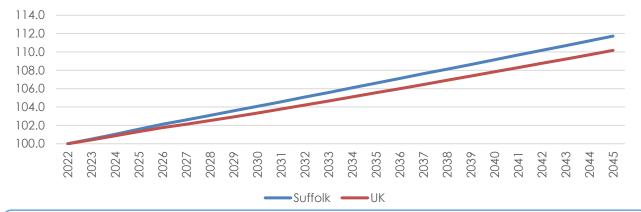
Suffolk +20 years – will our economy be sufficient to fund what we will need?



Although Suffolk is forecast to see above average employment and GVA growth, it is unlikely to close the current productivity gap due to low wages...



Employment indexed to 100 (100=2022):



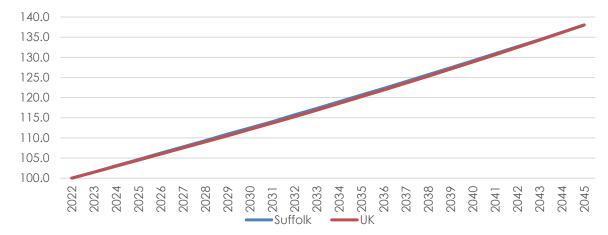
Employment is forecast to grow more strongly in Suffolk than in the UK as a whole, but GVA growth is only expected to keep pace with the UK average.

GVA indexed to 100 (100=2022):

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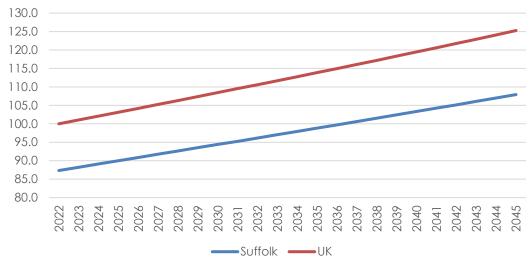
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... but Suffolk's labour productivity (GVA per worker) is forecast to take around 14 years to reach the **current** UK level, by which time the UK figure is expected to have grown by around 15%. Labour productivity is expected to remain at less than 90% of the UK average

The "productivity gap" is expected to widen over the next 20 years from £2.6bn in 2022 to £3.7bn in 2042.

Labour productivity – Indexed to 100 (100 = UK in 2022):



Source: East of England Forecasting Model 2019. "Productivity gap" is the difference in total GVA Suffolk would produce if our productivity per worker was at the UK average

Our PHM dataset enables us to look at more detailed *healthy life expectancy* data. Healthy life expectancy is clearly lower for people living in areas of greater deprivation in Suffolk, which is likely to mean these communities will find it increasingly difficult to work into their late 60s or 70s, exacerbating existing inequalities further (data excludes Waveney).

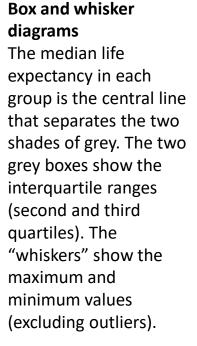


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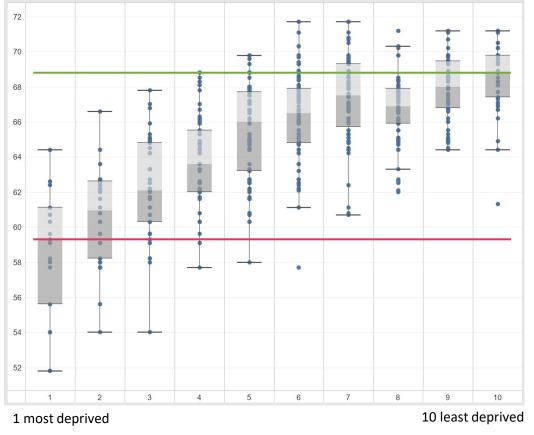
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Note the vertical axis are different scales



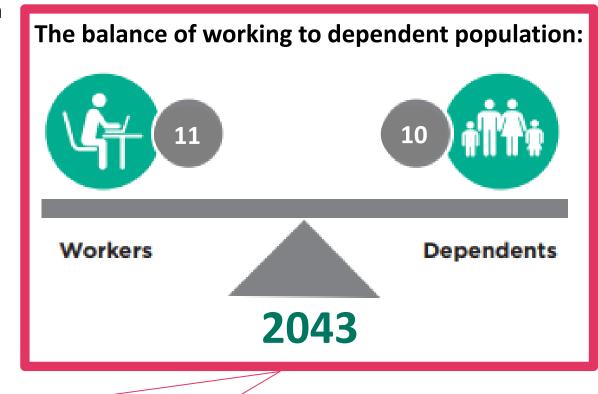
Female healthy life expectancy



Source: Optum PHM Dashboards, population of the two Suffolk alliance areas, SNEE population, Sep '22 – Aug '23

This matters because Suffolk's labour force is likely to dwindle in proportion to our total population...

- Currently 88.2% of people in Suffolk aged 65 and over are economically inactive. If this trend continues, more than 1 in 4 (27.1%) of Suffolk's population will be economically inactive people aged 65 and over by 2043 (the increasing retirement age will mitigate against this to some degree) compared to 21.9% today.
- Economic forecasting from the East of England Forecasting Model (2019) currently suggests that Suffolk job numbers will grow by 10% (38,000) between 2022 and 2042, though this was based on an assumption of much stronger working age population growth than Office for National Statistics (ONS) projections.



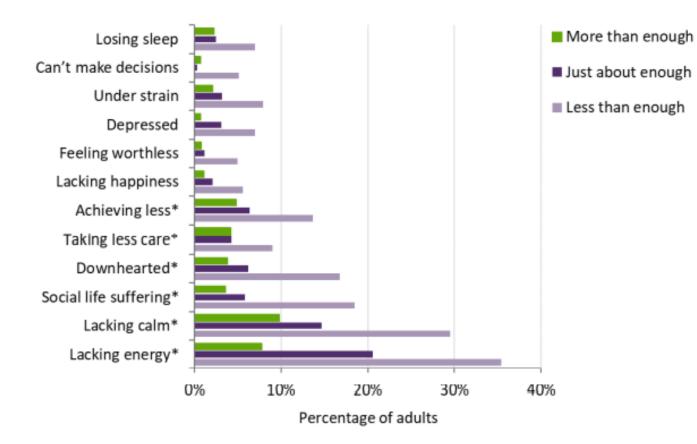
By 2043, there will only be 1.1 people of working age (18-64) for every child or person of retirement age – 2.8 people aged 18-64 for every child and 1.7 for every person of retirement age.

In 2023 the overall ratio is 1.2 : 1, with 2.8 working age residents for every child and 2.2 for every individual of retirement age.

Source: ONS sub-national population projections mid-year 2018-based, ONS Annual Population Survey 2023. "Working age" = 18-65 inclusive.

Suffolk County Council & Communities ... and because mental wellbeing is much lower for people who think they do not have enough resources to fund their retirement....and remember the relationship between mental health and physical healthcare demand we saw earlier...

Figure 12: Age-old worry: the adequacy of pension provision shapes all the anxiety markers in the run-up to retirement



Notes: Indicators without an asterisk are derived from the General Health Questionnaire (GHQ) and those with an asterisk are from the Short Form Survey (SF-12). See Annex A for the precise wording and use made of each question. Source: JRF analysis of Understanding Society, 2019/20

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Summary of key points

- The population of Suffolk is already relatively old and is likely to continue to age quickly 1 in 5 of the entire population aged over 75 would be unprecedented as a population structure
- This population will have significant health needs, associated with age and complexity
- There are already deep inequalities in key population metrics in Suffolk, and given the distribution of multimorbidity in mid-life, and the reductions in support for children, these may deepen further over time
- Suffolk continues to have fewer skilled workers, and fewer workers in the highest professional roles
- Relatively poor educational has long been a driver of relative deprivation in Suffolk our education outcomes are far worse than our overall level of income deprivation would suggest (114th out of 153 Authorities for KS2 RWA, compared to 53rd least deprived Authority, 2024)
- This obviously affects children, alongside wider issues such as cuts in welfare support for the youngest in our society, and rising SEND prevalence
- Low wages lead to a productivity gap in Suffolk, which may be exacerbated in future if our relatively older population cannot continue working into their late 60s and 70s
- Housing is being delivered but there are significant underlying pressures in terms of cost and the growing prevalence and impact of private renting

So - What to do?

- Prevent everything which is possible to prevent we need to be more targeted, guided by the data
- Continue to try to mitigate health inequalities in local populations
- Develop new models of health and care our current ones will not cope with our ageing population (or future pandemics) if we deliver care in the way we do now
- Continue the relentless focus on education and skills particularly for the most disadvantaged children but also for adults with low qualifications, enabling people to continue in work for longer as pension age rises
- Consider how larger companies / highly skilled work could complement the SME work Suffolk is already good at, but which offers comparatively few highly skilled / highly paid roles
- Consider a particular focus on children
- Try to address the fragmentation of housing policy history suggests current approach will not cope with future demands
- Continue to worry about Ipswich and Lowestoft...

Percentage of pupils at the end of Key Stage 2 meeting the expected standard in reading, writing, and maths (combined) by local authority, 2024 (state-funded schools)

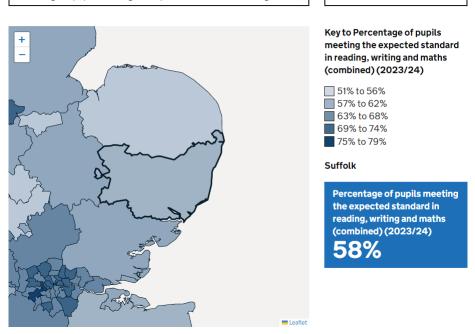
Percentage of pupils at the end of key stage 2 meeting the expected standard in reading, writing and maths (combined) by local authority, 2024 (England, state-funded schools)

2. Select a Local Authority

Suffolk

1. Select data to view

Percentage of pupils meeting the expected standard in reading, writin -



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