

THE TWELVE TRIBES OF SUFFOLK

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EUFO Limited
6 Greenways Close
Ipswich
Suffolk
IP1 3RB



The Greenways Partnership Limited
Saracen's House
25 St Margaret's Green
Ipswich
Suffolk
IP4 2BN

THE POPULATION OF SUFFOLK

Suffolk is a rural county of eastern England, located about 60 miles north east of London. Traditionally, the county has been associated with the rural economy – in many ways, the Industrial Revolution didn't come to Suffolk – and this has affected the composition of the population of the county. In a project that examines the future prospects for the population of Suffolk, it was important to review the immediate past – if only to see what trends are apparent. We decided to look as far back as we are looking forward. This fitted in well with the data, which was derived from the 1981 Census and the 2001 Census.

The 2001 Census estimates the population of Suffolk to be in the region of 669,000 inhabitants. The largest town in the county - the county does not have a city, although there is an ancient cathedral at Bury-St-Edmunds – is Ipswich. The population of Ipswich was estimated as 117,000 in the 2001 Census, rather emphasizing the rural nature of land use within the remainder of the county.

The most salient feature of the period 1981-2001 is the growth of the population within the county. During this period, the population of the county grew by 13%. For each year, there was, in addition to the organic growth in population, a net inflow of migrants into the county. Of these, 43.0% originated from the London Region, and 20.4% originated from the South Eastern Region. However, in this context, Essex is counted as part of the South Eastern Region, and there is evidence to suggest that much of the movement to Suffolk from the South Eastern Region (about 67% of the total movement) was of a distance of less than 10 miles.

16% of those moving to Suffolk did so to trade up their housing. This is a distinctly English phenomenon that needs to be explained for overseas readers. In England, during the period 1981-2001, the disparate inflation of house prices gave rise to a situation where those people living in London could sell their London accommodation, clear their mortgage finance, and buy a similar or larger house with the remaining funds from the sale of their London house. As Suffolk is only an hour away from London by train, the period 1981-2001 saw the growth of Suffolk as part of the London travel-to-work area.

As we said, 16% of those moving to Suffolk did so to trade up their housing. 13% moved to Suffolk for work reasons, including those who used the released equity from their London property to fund a business start-up. 9% moved to Suffolk to live in a better area, and 9% moved to Suffolk as part of their retirement. Over the long period, the attractiveness of Suffolk as a place to live and a place to retire has

affected the composition of the population of Suffolk.

The 2001 Census showed that about 60% of the population were of working age, whilst 61% of the population over 15 were economically active. Of those economically inactive, about two thirds were fully retired, and about one third were economically inactive for other reasons. These provide a latent pool of labour which could be drawn upon should the labour participation rate change. Of the economically active, 13.5% were classed as self-employed. This would indicate a relatively low level of activity.

The 2001 Census also indicated that 71.6% of the population of Suffolk were “Middle Class” (of professional, managerial, technical, and skilled occupations). This is significant in terms of the project because within this bland category lies one of the key issues facing the Suffolk economy today. We decided to look into this area further through an analysis of the lifestyle tribes within Suffolk, and found that this dynamic is one of the key issues that will determine the future of small business in Suffolk.

THE CONCEPT OF THE TRIBE

Few people would argue with the view that the economy has changed dramatically over the last twenty years. The main basis of the change has been a shift from being an economy of the industrial age to the development of an economy of the information age. Less has been said about the attendant changes in the society that accompanies the economy. Just as there have been profound changes in the economy, there have also been profound changes in the nature of society over the past twenty years.

The main change evident in the UK society has been the diminution of the traditional working class and the growth of a newer middle class. In many ways, this change is as unhelpful as it is helpful. The new middle class is not a homogenous phenomenon, and there are wide social variations within this segment of society. The need to capture these variations led to the concept of the Lifestyle Tribe – groupings within a society that are part of a larger group (e.g. “the middle class”), but which also capture the variations within that larger group.

The idea of social class has an economic dimension, but it is not exclusively economic. There is also the question of attitude, which impacts upon consumption. It is common now to look at consumption as more of a lifestyle choice than in functional terms. With the advent of large scale and relatively low cost computer processing capacity, our purchasing patterns can be collected and aggregated for analysis to reveal our lifestyle choices – from which our social attitudes are then inferred.

An interesting result of this analysis is that we all tend to gravitate towards living close to others who are of a similar mind to us. When you think about it, this is quite obvious. Most people have a social need – they need to have the company of others – and it is logical for people to socialise with those to whom they have a natural affinity. It is customary, therefore, to find that, in residential patterns, there are clusters of like-minded people.

These clusters are grouped according to lifestyle, and form the basis of the Lifestyle Tribes. Within the tribe, although there is a degree of diversity according to age, household income and housing tenure, there is also a common bond of social attitude that is more important than the diversity within the group. The diversity within the tribe is the agent that causes the tribe to change over time. Although we shall describe the tribes in static terms, it has to be remembered that these tribes do change over time, and that we need to stay abreast of these changes if the analysis is to retain its practical value.

There are twelve Lifestyle Tribes present in Suffolk to varying degrees. They are not distributed evenly within the county, but they do reflect the land use pattern in which they are based. Within each Lifestyle Tribe are a number of sub-groupings that help to define further the attributes of the groups. In some ways, the sub-groups are quite important, whilst in others the difference is not so central.

For example, in the most prevalent group, the “Country Dwellers”, the differences between the “Gentrified Villages” sub-group and the “Rural Retirement” sub-group are pretty important. By way of contrast, the differences between the “Rural Disadvantage” sub-group and the “Small Farms” sub-group is less marked. These distinctions reflect the special circumstances of Suffolk, which have changed over time.

The current distribution of the population reflects the historical development of the county. Whilst a snapshot of the population at a given point in time is useful, it has to be remembered that a population is a dynamic phenomenon. However, given this caution, we can see some interesting features of the distribution.

The most salient feature is that, despite 43.5% of the population living in rural locations (according to the Countryside Agency), only 22.8% of the population are Country Dwellers according to lifestyle. This demonstrates the increasingly suburbanised nature of the county. This trend has been pronounced during the period 1980-2000. There is nothing to suggest that this trend will be reversed in the period up to 2020.

Each of the twelve Lifestyle Tribes that inhabit Suffolk has a set of distinct characteristics that allows us to identify them as a group. The following pages identify these twelve tribes and examine the main sub-tribes present.

THE COUNTRY DWELLERS

As a group, the Country Dwellers represent the traditional rural society of Suffolk. They tend to live in smaller villages and in the old heart of the larger villages, away from the newer estates that have been built onto the villages in Suffolk. The houses of Country Dwellers tend to have names rather than numbers, and this is a key point to identifying members of the group.

Within the areas of Country Dwellers, Agriculture and Tourism are significant sources of employment. Small-scale provision is seen as important in an attempt to counterbalance the depersonalising effects of mass consumption. As we would intuitively expect from a more self-contained grouping, the Country Dwellers exhibit a wide spread of age, incomes and residential tenures. As a community, they are highly reliant upon each other as they suffer from poor service delivery from both the private sector and the public sector. For them, the ownership of a car is vital if they are to participate fully in society.

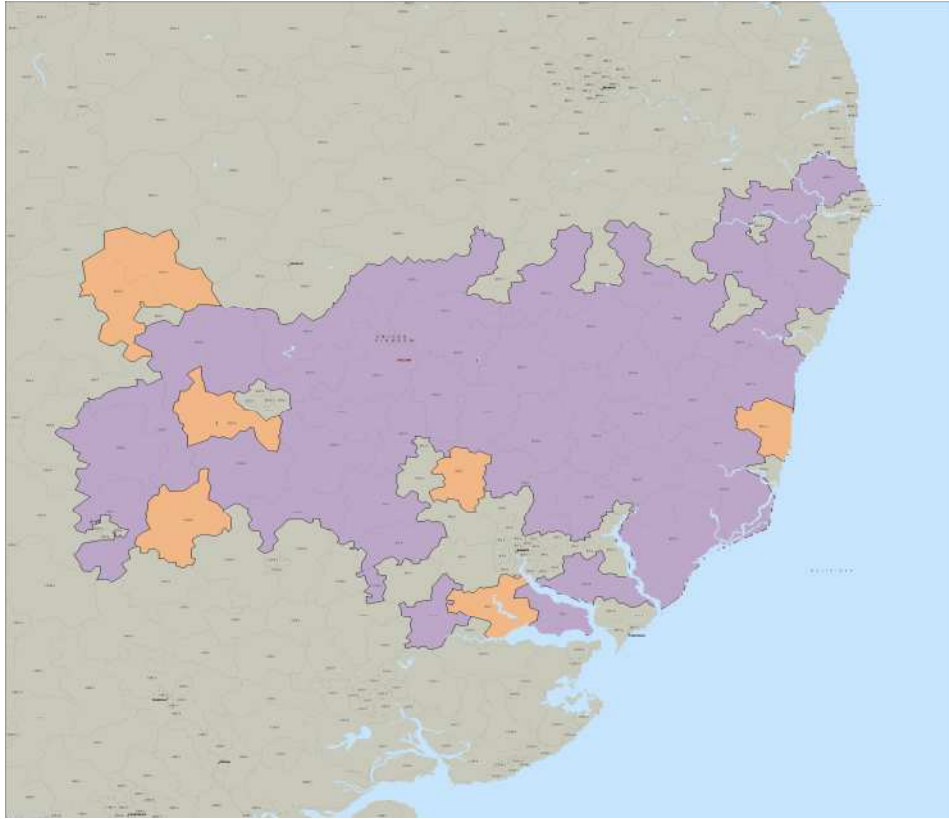
Four sub-groups within the Tribe are present in Suffolk - Rural Disadvantage, Gentrified Villages, Small Farms, and Rural Retirement. What is striking about these groupings is their diversity. Those living in Gentrified Villages tend to enjoy higher than normal levels of income and live in high value housing, whilst, for example, those living in the Rural Disadvantage sub-group tend to suffer from lower than normal levels of income and live in low value housing. As a group, the Country Dwellers show a wide variety of income levels.

One common feature of the Tribe is their preference for Country Sports and Outdoor Pursuits. The exact nature of the enjoyment of these is determined by the ability of the members of the Tribe to afford the various aspects of these preferences (for example, those in Gentrified Villages have a marked preference for Sailing).

However, what brings the Tribe together can also pull it apart. The sheer diversity of the Tribe means that income and class based differences will provide sources of friction within the Tribe. For example, the Rural Disadvantaged and the Rural Retirement sub-groups demonstrate a pronounced antipathy towards the sailing fraternity in the Gentrified Villages sub-group.

In many ways, the Country Dwellers represent the rural aspect of the whole of society in a microcosm. The Tribe has been in retreat for the past twenty years, and we can reasonably expect it to retreat even further in the period to 2020. The key issue facing the group will be how it can remain viable given the increasing threats to its way of life.

The following map shows the locations of the Tribe in Suffolk.



The area shaded in Purple is where the Country Dwellers are the primary Tribe, and the area shaded in Orange is where the Country Dwellers are the secondary Tribe.

SUBURBAN SEMIS

The Suburban Semis represent the heart of middle England. They tend to be the foundation of Middle Class suburbia. The members of the group tend to be middle aged, middle-income families, where the primary occupation is middle-management work in large service based organisations. In this group lies the heart of the bureaucracy in Suffolk.

The group tends to live in the satellite villages or outer fringes of the larger conurbations in Suffolk. The members tend to live in owner-occupied semi-detached housing that has sufficient garden space to allow for a wide variety of leisure activities.

The group tends to live a well-ordered life and has both the time and the leisure to engage in a wide variety of activities. In many ways, this group represents the heart of the political class in Suffolk, as they are the natural joiners, organisers, and doers in society. They tend to have both the time and inclination to become involved in community affairs.

There are three sub-groups of the Tribe present in Suffolk - Suburban Mock Tudor, Pebble Dash Subtopia, and Green Belt Hoppers. As a group, they tend to represent the Mid-level to Upscale and Executive Suburban groups, enjoying higher than average incomes and living in Mid to High Value housing. The Tribe is characterised by its uniformity, almost to the point of blandness.

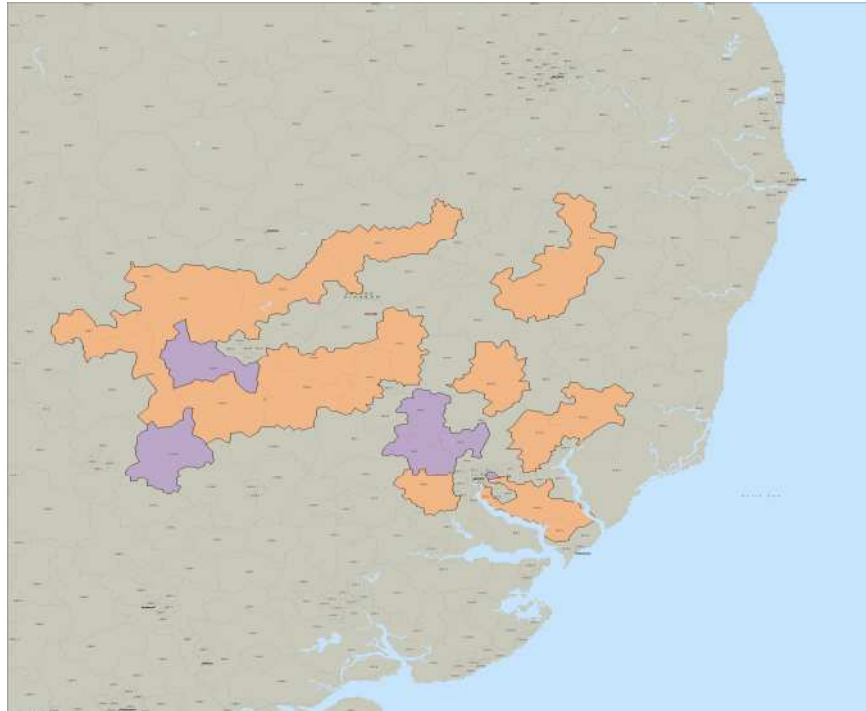
As a group, the Tribe tends to be very materialistic - with a preponderance towards consumer electronics and gadgets - and also very social - with a preference for clubs, societies, and organised leisure activities. The group has both the time and the disposable income to be able to follow these pursuits. There is little individual variation from this theme in the differences between the sub-groups.

The Tribe tends to be antipathetic towards what it sees as “inferior” activities. For example, the health conscious members of the Suburban Mock Tudor sub-group show a distinct antipathy towards smoking, whilst the travel loving Green Belt Hoppers are not very keen on domestic activities (normally they engage staff to help with cleaning, gardening, etc.).

As the second largest Tribe in Suffolk, the Suburban Semis have been pushing out the Country Dwellers over the past twenty years. Our estimates indicate that this trend will continue over the next twenty years. The key issue facing this group will be the extent to which it can maintain its way of life over the next twenty years.

Faced with increased demands on the infrastructure that the Tribe relies upon; will it be able to retain the comfort to which it has become accustomed?

The following map shows the locations of the Tribe in Suffolk.



The area shaded in Purple is where the Suburban Semis are the primary Tribe, and the area shaded in Orange is where the Suburban Semis are the secondary Tribe.

BLUE COLLAR OWNERS

Contrary to popular belief, there is a strong tradition of Blue Collar Owners in the UK. In the Victorian Age, this group were called as the “Working Class Tories”, and it is this set of values that the tribe draws upon. They tend to live in the less expensive areas of owner occupied housing, they tend to work in skilled trades or junior clerical jobs, and they tend to be proud and self-reliant.

In terms of education, the members of the group tend to be practical rather than intellectual, and they feel that the value of education lies in the practical use to which education can be put. Many members of the group did not have an easy start to life and they feel that they have worked hard to achieve the material comfort that they enjoy.

The parents of this group tend to express their ambitions through their children even though there is a relatively low level of uptake of further and higher education in this group. In turn, this leads to a relatively high level of offspring living at home after school. In consumption terms, household incomes tend to be high owing to the large number of working adults present in the household and the absence of expensive mortgages.

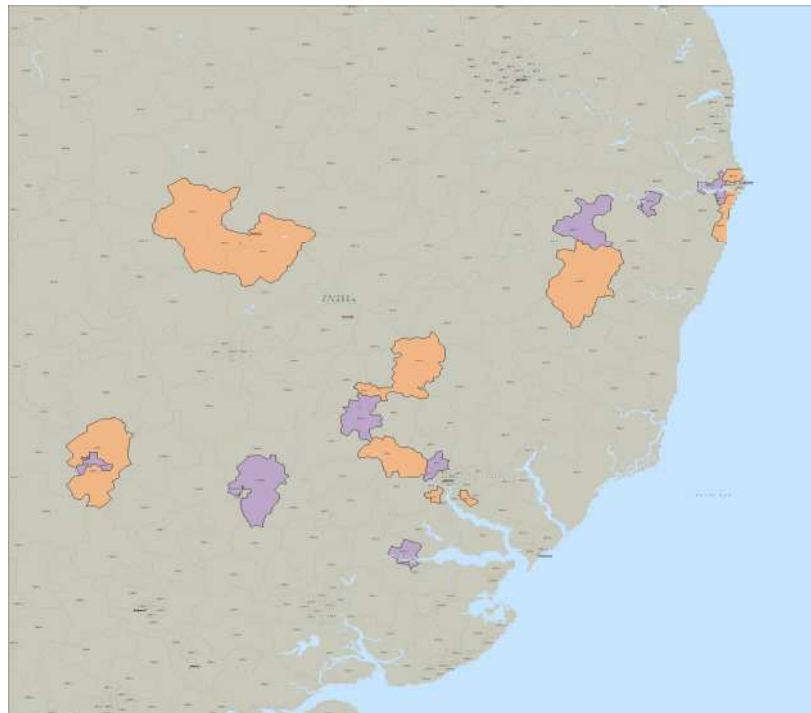
There are two sub-groups to this Tribe who live in Suffolk - the Affluent Blue Collars, and the Lo-Rise Right To Buy. The Affluent Blue Collar sub-group tends to live in upscale suburban areas where, despite their blue collar origins, they have sufficient income to be able to afford these areas. The Lo-Rise Right To Buy sub-group tends to enjoy normal levels of income, and has exercised their right to buy their local authority housing stock. As such, they tend to live in the more built-up parts of the county.

Despite their common origins, the two sub-groups are quite disparate in their likes and dislikes. The Affluent Blue Collar sub-group has a preference for Home Improvements, the Lottery, and Outdoor Pursuits. The Lo-Rise Right To Buy sub-group on the other hand has a preference for Personal Loans, Barbeques, and Travel Inns.

Equally, the Affluent Blue Collar sub-group has an antipathy towards Domestic Staff, Satellite Dishes, and the NHS; whilst the Lo-Rise Right To Buy sub-group on the other hand has an antipathy towards Country Clubs, Foreign Holidays, and Espresso Culture.

However, having said this, both groups have a predisposition towards self-improvement (in their own way), and both have an inward focus that helps to frame their dislikes. Historically, his group experienced growth in the period 1980-2000. However, with the demise of traditional Blue Collar employment, it is quite likely that this group will decline numerically in the years to 2020. The key issue facing this Tribe is how they can maintain their lifestyle in the face of structural decline.

The following map shows the locations of the Tribe in Suffolk.



The area shaded in Purple is where the Blue Collar Owners are the primary Tribe, and the area shaded in Orange is where the Blue Collar Owners are the secondary Tribe.

HIGH INCOME FAMILIES

In the context of Suffolk, the High Income Families tend to be those who have moved to Suffolk from London and the South East, and who still work in London. They tend to be congregated within easy travelling distance from a main rail station.

They live in the more affluent and expensive areas where professionals and the more wealthy business people can afford to live in the large, highly priced, owner occupied housing of these areas. Typically, these are family neighbourhoods where inter-war and early post-war housing predominates. The houses tend to have four or more bedrooms and quite large gardens.

There are very few first-time buyers and younger families in this group. Two-income, upmarket households dominate the group, where there are older children who reflect the high achievement orientation of their parents. The levels of education amongst this group tend to be high and many members of the group have accumulated substantial amounts of capital.

In Suffolk, there are five sub-groups belonging to this tribe - the Clever Capitalists, the Ageing Professionals, the Rising Materialists, the Corporate Careerists, and the Small Business Owners. The five sub-groups are all solidly white collar in terms of occupation, and live in a suburban/ small town setting. In terms of income and wealth, they are all upscale and executive in outlook.

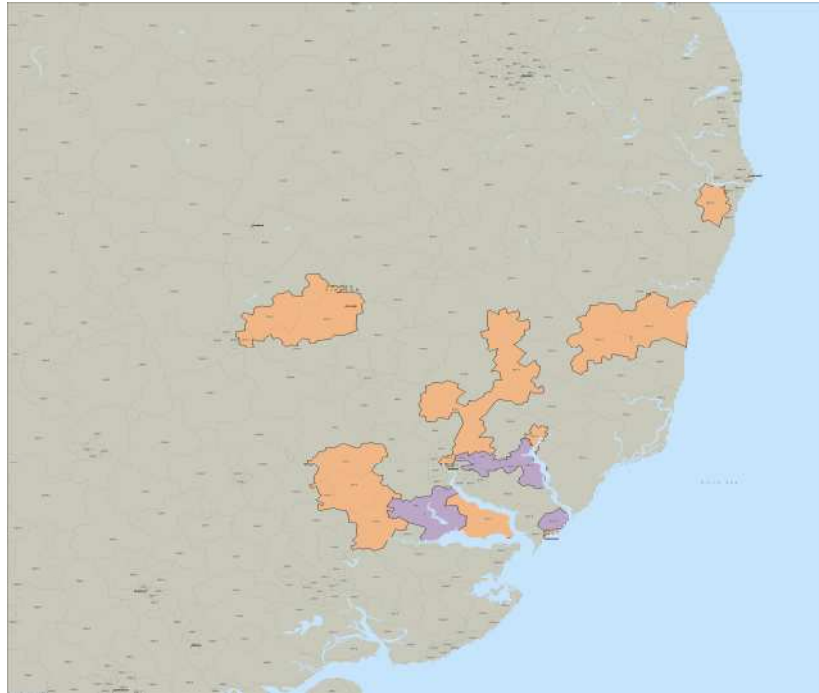
The five sub-groups all demonstrate a preference for Health Clubs, Country Clubs, and Foreign Travel. Given the similarities in background, outlook, and income & wealth, this is not a surprising result. However, what does differentiate the sub-groups is their attitude towards technology. For example, the Clever Capitalists have a preference for PC Banking, whilst the Corporate Careerists display a preference for Internet Shopping. The technology is available to the members of the sub-groups, but the use to which they put it depends upon their differing life conditions.

There is no common thread to the dislikes of the five sub-groups. For example, the Rising Materialists dislike Dieting, Bargain Stores, and Urban Pursuits, whilst the Corporate Careerists dislike Camping, Watching TV, and Travel Inn. It would be interesting to establish a common thread to these antipathies, but that is beyond the scope of this project.

In demographic terms, this Tribe has been growing at an accelerating rate over the period 1980-2000, even though it started from a very low base. It currently accounts for about 10% of the population in Suffolk, but has the potential to grow to

25% of the population, being the largest Tribe in Suffolk by 2020. The key issue surrounding this tribe is the extent to which the other tribes will be able to accommodate that growth.

The following map shows the locations of the Tribe in Suffolk.



The area shaded in Purple is where the High Income Families are the primary Tribe, and the area shaded in Orange is where the High Income Families are the secondary Tribe.

TOWN HOUSES & FLATS

The Town Houses & Flats group consists of mainly smaller properties, generally terraced housing, inhabited by junior administrative and service employees who do not have large families. On occasion, this tribe lives in larger properties that have been divided into smaller self-contained flats. A good proportion of these flats tend to be privately rented.

In terms of location, the group tends to be established in the smaller market towns of the satellite areas in Suffolk, and towards the centre of the larger towns. Although suburban in outlook, the group tends not to live in the suburbs of the towns in Suffolk.

The group predominately works in the Care Economy where inter-personal skills are at a premium. The members tend to be well informed and sociable in their lifestyles. Their aspirations tend to centre on the acquisition and enjoyment of material possessions.

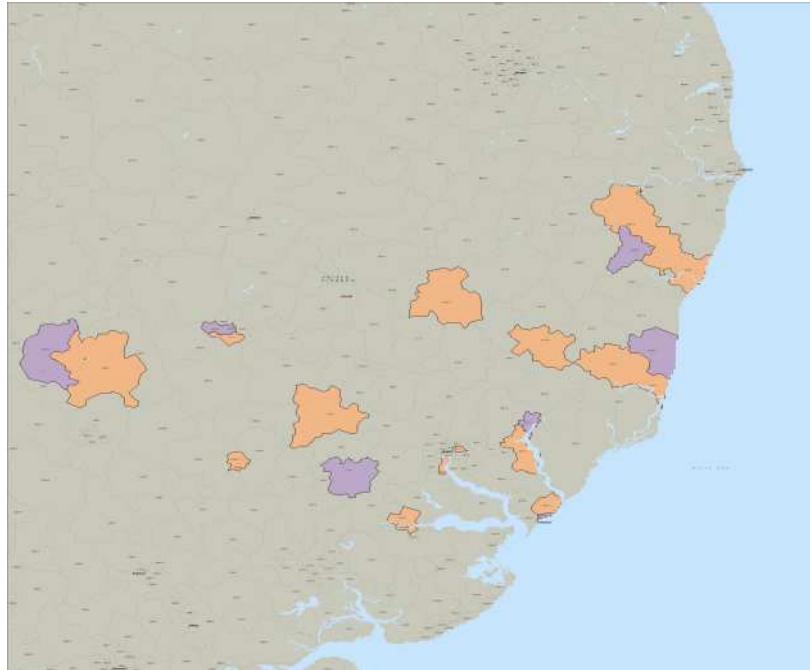
The Tribe has three key sub-groups present in Suffolk - the Bijou Homemakers, the Market Town Mixture, and the Bedsits & Shop Flats. In demographic terms, the Tribe tends to be of the Urban Fringe, but located in the smaller towns in Suffolk. They tend to be both owners and renters of property, who work in the blue collar and service sectors. In terms of income, they tend to be in the range of Low Income (Bedsits & Shop Flats) to midscale income (Bijou Homemakers). As a group, the Tribe tends to be younger than average.

The likes of the sub-groups are quite disparate. For example, the Bijou Homemakers have a preference for Espresso Culture, Financial Services, and Affinity Cards; whilst the Market Town Mixture has a preference for Consumer Electronics, Outdoor Pursuits, and Science Fiction. Perhaps the unifying strand across all three sub-groups is that their long term patterns of consumption have yet to be determined.

This hypothesis further takes root when we examine their dislikes. For example, whereas the Bedsits & Shop Flats sub-group tends to be smokers, the Market Town Mixture sub-group has a marked dislike for smoking. Equally, there are inconsistencies within the sub-groups themselves. For example, the Bijou Homemakers simultaneously have a preference for Financial Services, with a dislike of both PC Banking and Personal Loans.

This group has maintained its levels during the period 1980-2000. However, as the population starts to age by 2020, so this group is likely to decline in relative terms. The key issue surrounding this Tribe is how the other Tribes will accommodate this prospective loss to the workforce.

The following map shows the locations of the Tribe in Suffolk.



The area shaded in Purple is where the Town Houses & Flats are the primary Tribe, and the area shaded in Orange is where the Town Houses & Flats are the secondary Tribe.

INDEPENDENT ELDERS

The Independent Elders predominate in areas where there is a high concentration of bungalows and low-rise blocks of flats. These areas are dominated by those aged over 55 who are attracted to Suffolk as a retirement location. The members of the group tend to be conservative in outlook and self-reliant in disposition.

Income levels vary within the group depending upon the age profile of the group and the level of pension provision that the group enjoys. However, as the group remains quite fit and active, it is common to find members of this group embarking upon a second or third career. In some cases this is to supplement their income, in others it is to stay fit and active.

As this group is relatively dependent upon investment income, their expenditure patterns will vary as the financial markets change. Although their income may appear low, a low level of outgoings tempers it – most houses are owned outright, their children do not live at home, and they are adequately supplied with a lifetime's accumulation of consumer durables.

There are three sub-groups of this Tribe located in Suffolk - the Solo Pensioners, the High Spending Greys, and the Aged Owner Occupiers. The common feature of the three sub-groups is that, to wherever they retire, their location takes on the characteristics of a retirement town. Whilst the group tends to be reasonably affluent - both in terms of income and assets - there remains the real issue of who exactly will service the needs of this group.

The three sub-groups are quite uniform in the likes. All here sub-groups show a marked preference for Clubs & Societies, Outdoor Pursuits, and Foreign Travel. Not surprisingly, the quality of NHS delivery is quite an issue with this Tribe. It is difficult to differentiate the three sub-groups in terms of their preferences.

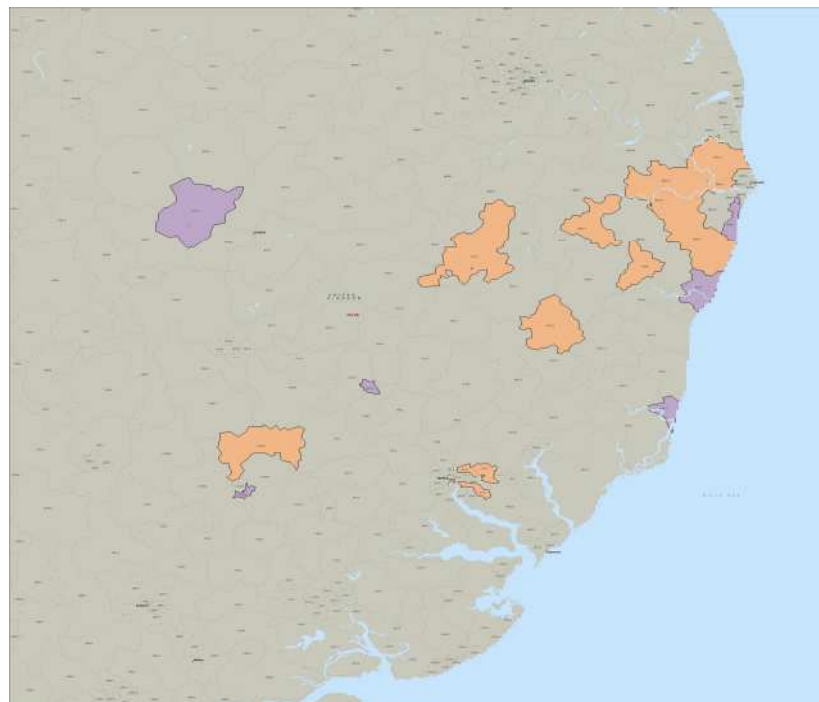
What does differentiate the sub-groups is their dislikes. Whilst the Solo Pensioners dislike Internet Shopping and Financial Services, the High Spending Greys dislike Home Improvements and Consumer Electronics, and yet again the Aged Owner Occupiers show an antipathy for the New Age and Smoking. Whereas the likes of the sub-groups were uniform, their dislikes are quite disparate.

As a group, the Independent Elders have grown quite rapidly in Suffolk between 1980 and 2000. There is every likelihood that the group will continue to grow relative to the other Tribes in Suffolk, but at a rate lower than that by which the

Tribe is growing on the South Coast of England. Suffolk is unlikely to rival Bournemouth as a retirement destination.

However, by 2020, the Tribe will be making its mark in Suffolk relative to the other Tribes. We project that it could rise from the current 5% of the population to possible 10% of the population. This is likely to be at the expense of the Country Dwellers. The key issue facing this Tribe is the extent to which the other Tribes are able to accommodate this growth.

The following map shows the locations of the Tribe in Suffolk.



The area shaded in Purple is where the Independent Elders are the primary Tribe, and the area shaded in Orange is where the Independent Elders are the secondary Tribe.

MORTGAGED FAMILIES

The Mortgaged Families tend to live in areas of recently built private housing. They are typically younger families for whom mortgage repayments are a large proportion of their household expenditure. Whilst the group tends to be populated by young families, there are an increasing number of childless couples in this group.

They tend to be located more on larger groups of housing that have been built on greenfield sites, and which are dominated by a poor transport infrastructure and a lack of well developed community facilities. In the context of Suffolk, this creates a need for every adult member of the family to have a car. The members of this group tends to resent the “anti-car” nature of public policy as they feel that policy makers do not fully appreciate the nature of their dependence upon the car for work, leisure, and to simply take the children to school.

This colours the leisure activities of this group. They tend to shop, as a family, at large edge-of-town retail outlets where there are a number of stores in a single location that has good parking and easy access to the main roads.

There are three sub-groups to this Tribe living in Suffolk - the Brand New Areas, the Nestmaking Families, and the Prenuptial Owners. The common thread to these three sub-groups is that they tend to be either childless couples or couples who are at the start of raising a family. In terms of occupation, they tend to be located in service industries and junior white collar occupations. Their income levels tend to be mid-scale, but this belies the ambition of the group, who see themselves as upwardly mobile. Indeed, many of the members of this Tribe are unlikely to settle in these areas over the long term. They tend to be passing through to better things.

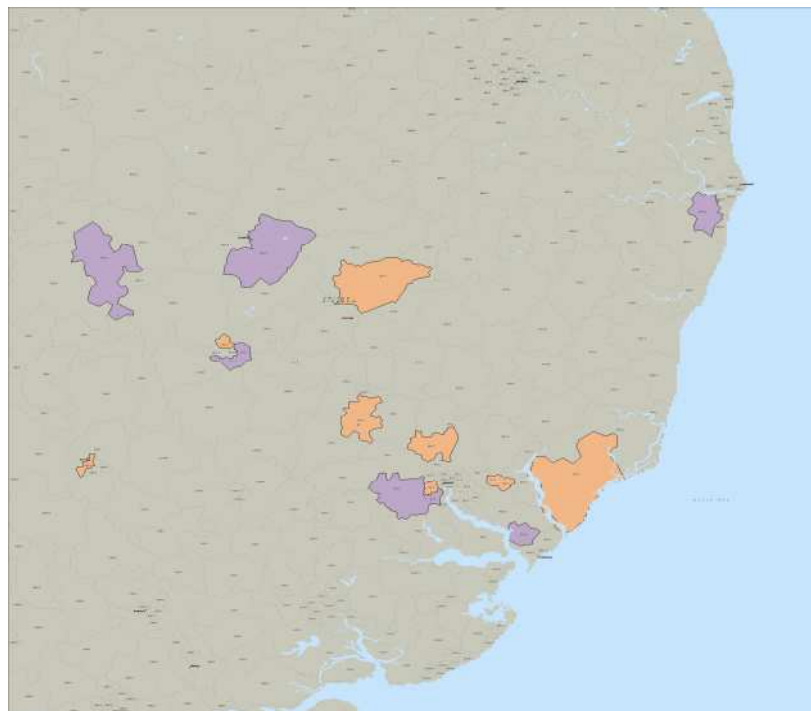
The three sub-groups tend to be quite disparate in their likes. Whilst the Brand New Areas and the Prenuptial Owners have a liking for Foreign Travel, the Nestmaking Families are unable to share this interest as they simply can't afford it. There also some acute cultural antipathies within the Tribe. The families living in the Brand New Areas have a preference for Urban Pursuits and Health Clubs, whilst the Nestmaking Families have a preference for completely the opposite - for Outdoor Pursuits.

In many ways, this reflects the orientation of the two sub-groups. Those living in Brand New Areas tend to be Urban Achievers, whilst those who belong to the Prenuptial Owners sub-group tend to be Young Influentials. This is reflected further in the dislikes of the sub-groups. Those living in Brand New Areas tend to dislike mobile phones and professional sports; those in the Nestmaking Families sub-

group have an antipathy for boxing, dieting, and smoking; whilst the Prenuptial Owners sub-group are not keen on gardening and pets. These dislikes reflect the life conditions faced by the members of the sub-groups.

As a group, this tribe has been stable numerically over the period 1980 to 2000. There is no reason to suggest that there ought to be any significant change in the relative incidence of this group out to 2020. The members of the group will change over time, but that reflects the transitory nature of membership to this group.

The following map shows the locations of the Tribe in Suffolk.



The area shaded in Purple is where the Mortgaged Families are the primary Tribe, and the area shaded in Orange is where the Mortgaged Families are the secondary Tribe.

LOW RISE COUNCIL

Members of this group live in the areas of Local Authority and Housing Association accommodation in Suffolk. For one reason or another, they have not exercised their right to buy their housing. The most common reasons are that their wages are too low to service a mortgage, they may be retired and living on a State Pension, or they may be considered as high risk by mortgage lenders.

Most of the estates were built in the 1930s and 1950s to high standards. They are typically of two to three bedroom houses, built over two storeys, and with a garden. There is a low population density within these areas as the properties generally have reasonably generous gardens.

The members of the group tend to be older than average, as the younger members of the group have tended to move into owner occupied housing when leaving the parental home. Incomes are generally low, partly reflecting the higher rates of unemployment in these areas and partly reflecting the decreasing importance of unskilled labour in the economy.

There are four distinct sub-groups to this Tribe in Suffolk - the Problem Families (who tend to be older families living in poorer areas), the Low Rise Pensioners (who tend to be older couples on a low income - usually a State Pension), the Better Off Council Houses (who tend to be blue collar families living in a small town setting), and the Low Rise Subsistence (who tend to be urban families working in low income blue collar and service industry jobs). The common thread to each of these sub-groups is the tenure of housing they occupy.

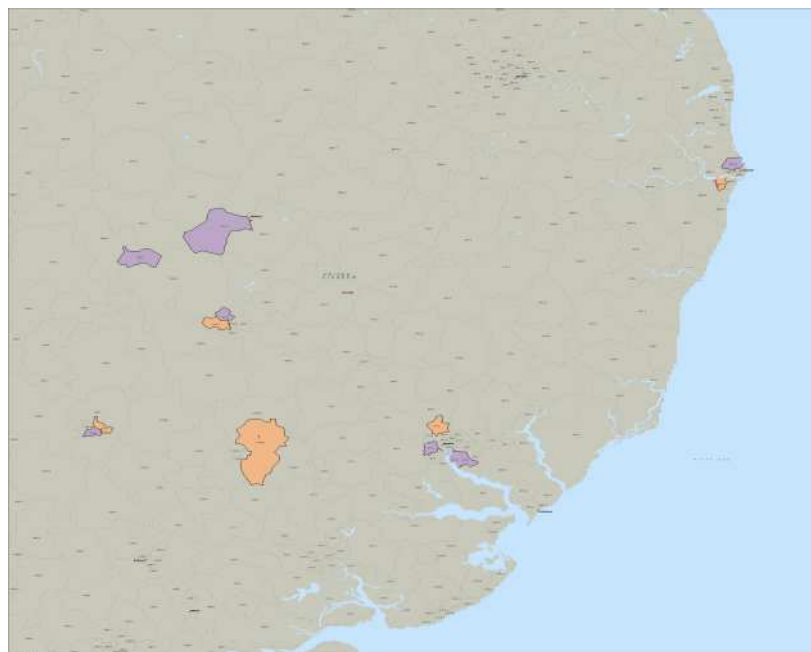
As a group, the Tribe shares a number of common interests and likes. For example F1 Racing appeals to both the Problem Families and the Better Off Council Houses. Again, the Low Rise Pensioners and the Low Rise Subsistence sub-groups both share an interest in Bargain Shopping, perhaps out of financial necessity. The Problem Families and the Better Off Council House sub-groups share an interest in televised sport shown over the Satellite Channels. All four of the sub-groups show an above average incidence of those who smoke.

Whilst there is a common thread to the likes and interests of this Tribe, by way of contrast, there is no common pattern to their dislikes. For example, the Better Off Council Houses sub-group shows a disliking for the radio, the BBC, and Foreign Travel. The Low Rise Subsistence sub-group, on the other hand, shows an antipathy to credit cards, craft activities, and outdoor pursuits.

As a group, this Tribe has been in decline over the period 1980 to 2000. The decline can be related to the growth in owner occupation, combined with former Council tenants exercising their right to buy. However, this is only part of the story. There has been a reduction in traditional blue collar jobs in Suffolk, from a lower than average base level. With the migration of the traditional blue collar work, so this Tribe has fallen numerically. We have no reason to suppose that this trend will be reversed in the years out to 2020.

The demise of this Tribe could herald some acute political changes in the coming years. The old, traditional, Council Estates form the basis of support for the Labour Party in Suffolk. If they should decline, and if the rising middle class abandon New Labour for the Lib-Dems, then the decline of this Tribe will give rise to a relatively turbulent political environment in the future. The uncertainty facing us is the extent to which these changes may come to pass.

The following map shows the locations of the Tribe in Suffolk.



The area shaded in Purple is where the Low Rise Council Tribe are the primary Tribe, and the area shaded in Orange is where the Low Rise Council Tribe are the secondary Tribe.

VICTORIAN LOW STATUS

The areas of Victorian Low Status housing are generally those in which there is a traditional community spirit, where younger families and older childless couples live in a well-balanced community. The housing tends to be owner-occupied and privately rented terraced housing. That the incidence of this group is infrequent in Suffolk reflects the low levels of housing occupation in the county during the Victorian era.

These more established communities tend to live towards the centre of towns and offer a less suburban lifestyle for those who prefer it. Although there is a high degree of social contact within the area, there is also a high degree of tolerance that allows the members of this group to experiment with different lifestyles. Lifestyle products do not necessarily drive the group and the accumulation of material wealth might not be a key factor for the group. An important dynamic of the group is that it tends to be relatively well educated, but has rejected the accumulation of material wealth as the main objective of their lives.

There are three sub-groups to this Tribe present in Suffolk - the Bohemian Melting Pot, the Rootless Renters, and the Rejuvenated Terraces. The Bohemian Melting Pot and the Rejuvenated Terraces sub-groups tend to be young, middle class, urban singles and childless couples, who work in white collar occupations. The Rootless Renter sub-group, on the other hand, tends to be a low income urban sub-group, who tend to work mainly in blue collar and low income service sector jobs.

Despite the commonalities between the Bohemian Melting Pot and the Rejuvenated Terraces sub-groups, the commonality has its limitations. These are revealed by their respective preferences. The Bohemian Melting Pot sub-group shows a liking for Foreign Culture, Health Clubs, and the Espresso Culture. The Rejuvenated Terrace sub-group, on the other hand, expresses a preference for Home Improvements, Outdoor Pursuits, and Financial Services. The distinction between the two groups is that the Rejuvenated Terrace sub-group are passing through this form of housing tenure, whilst the Bohemian Melting Pot sub-group is likely to stay much longer in this form of housing tenure. For the sake of completeness, the Rootless Renter sub-group has a preference for televised sport shown over the Satellite Channels. In many ways, this group has more in common with the Low Rise Council Tribe.

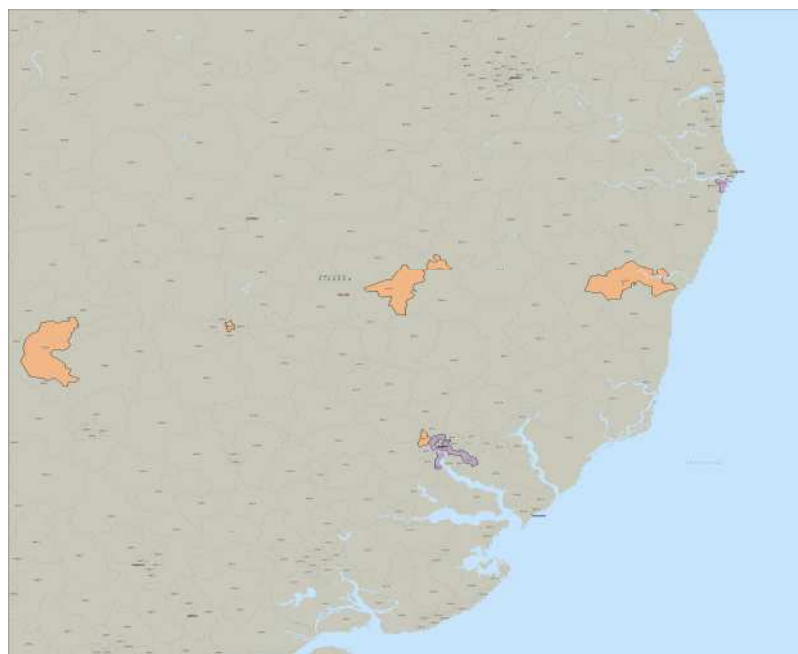
This mutual antipathy of the sub-groups shows even further in their dislikes. The Bohemian Melting Pot sub-group dislikes the Financial Services liked by the Rejuvenated Terrace sub-group, and the televised sport shown over the Satellite

Channels liked by the Rootless Renter sub-group. Equally, the Rejuvenated Terrace sub-group has an antipathy towards the televised sport shown over the Satellite Channels liked by the Rootless Renter sub-group. Finally, the Rootless Renter sub-group exhibits a dislike for the Financial Services liked by the Rejuvenated Terrace sub-group. In many ways, the areas inhabited by this Tribe show an uneasy truce between the sub-groups, who do not necessarily get on that well with each other.

As the group is defined by the period in which their housing originates, by definition it cannot grow. It can only decline as the old Victorian housing is demolished to make way for newer housing. This did not happen to that great an extent during the period 1980 to 2000. There are also no plans for a significant change to this group in the period to 2020.

However, the relative balance between the various sub-groups can change, and this will prove to be a very critical uncertainty in the coming years. If the Rootless Renter sub-group makes way for the Bohemian Melting Pot sub-group, then this could have a profound effect upon the economic prospects for the county, according to the model outlined by Professor Florida. This could be quite critical to the future development of Suffolk.

The following map shows the locations of the Tribe in Suffolk.



The area shaded in Purple is where the Victorian Low Status Tribe are the primary Tribe, and the area shaded in Orange is where the Victorian Low Status Tribe are the secondary Tribe.

STYLISH SINGLES

The Stylish Singles are those people for whom self-expression, exploration, style, and tolerance are important. There is only a small grouping of these people in Suffolk – exclusively in central Ipswich. Not unsurprisingly, they tend to be located close to the Victorian Low Status group.

The members of the group tend to be very well educated and involved in their work. They are aware of different social groups and enjoy living in a diverse and cosmopolitan environment. The members of the group focus on experiencing life, which usually means that they postpone marriage. They tend to avoid the responsibility of gardens, homes, and children.

The group does enjoy the exhilaration of life and will spend freely on fashion, foreign travel, the arts, entertainment, and eating out. Experiences are prized more highly than material possessions.

Within the Tribe, there are two sub-groups present in Suffolk - the Town Centre Singles and the Studio Singles. Both groups tend to work in white collar occupations and enjoy relatively high incomes. Both groups are similar in outlook, showing preferences for Outdoor Pursuits, Foreign Travel, and Health Clubs. Whilst the Town Centre Singles show a predisposition for Home Improvements, the Studio Singles show a predisposition for Financial Services. Although this does represent a difference between the two sub-groups, we ought not to stretch the point too far - both groups have far more in common than their apparent differences. This is again shown by noting the dislikes of the two sub-groups. They both have an antipathy for Bargain Shopping and Watching TV.

This group is numerically small in Suffolk, and exclusively located in central Ipswich. The numbers are too small to have registered a significant change during the period 1980 to 2000. However, this is likely to change quite radically in the years to 2020. The current regeneration of the Ipswich Waterfront is creating an environment suited to these two sub-groups, and the impending creation of a University Campus located in central Ipswich is also likely to create an influx of people who belong to this Tribe.

This is reasonably important to the engineering of a Creative Class in Suffolk, which is seen as a precursor to economic growth within the County. The critical uncertainty to 2020 lies in volume and impact. To what extent will this Tribe grow? And what impact will it have on the indigenous economy?

The following map shows the locations of the Tribe in Suffolk.



The area shaded in Purple is where the Stylish Singles are the primary Tribe, and the area shaded in Orange is where the Stylish Singles are the secondary Tribe.

INSTITUTIONAL AREAS

There are only a very few Institutional Areas in Suffolk, all of which are associated with the American Military Air-Bases in the county. These tend to form very self-contained and closed groups that reflect socially the rigid hierarchy of a military organisation and the fact that the service personnel (and their families) are living in a foreign country.

There is some contact between the military personnel and the indigenous population in the county, but that contact tends to be limited in scope and duration. The natural cycle of rotation of personnel in the USAF limits the ability of the military personnel to develop deep and lasting relationships with the indigenous population, whilst the cultural differences between the two groups limits the opportunities of the military personnel to integrate as fully as they may want to with the host community.

There is only one sub-group to this tribe - the Military Bases - which consists of military personnel who live locally, off-base, with their families. This group exhibits a curious combination of preferences - Health Clubs, Personal Loans, and an above average propensity to smoke. Perhaps this merely reflects the wide range of social backgrounds within the military as a whole?

In economic terms, whilst having a local importance in the west of the county, the Tribe is of no great significance to the economy of Suffolk. Indeed, much of the family spending takes place on the military base, with a relatively low multiplier effect in the local economy. As a group, the Tribe has declined between 1980 and 2000, as the USAF repatriated its service personnel. This decline may well accelerate out to 2020 as the focus of the USAF moves to Asian locations.

COUNCIL FLATS

This group presents an extreme anomaly for Suffolk. There is only a single incidence of this group, based in Felixstowe. Although named “Council Flats”, the group is represented by high density Local Authority or Housing Association dwellings. The members of the group tend to have very low incomes, limited leisure opportunities, and very low life expectations.

In these areas, there tends to be a high demand for high-risk consumer credit. This reflects the relatively large numbers of the unemployed, pensioners, long-term sick, and single parents who live in these areas. Few members of the group have educational qualifications and mobility is impaired by the lack of a car.

Despite many attempts to improve these areas, they still tend to suffer from high levels of crime and vandalism, which many hold as a reflection of the high levels of financial poverty in these areas.

The Tribe has only one sub-group in Suffolk - Small Town Industry - which comprises of the blue collar manual grades associated with the Port of Felixstowe. As a sub-group, they show a preference for televised sport shown over the Satellite Channels and show an antipathy for Internet Shopping and Mobile Phones.

As a Tribe, the fate of the sub-group is closely linked with the fortunes of the Port of Felixstowe. As the Port expanded during the period 1980 to 2000, so did the sub-group. As the Port is set to expand to 2020, so will the numbers of those belonging to this group. However, given their relative geographical isolation, and given their relative low numbers, this group is unlikely to be a force in the Suffolk economy to 2020, unless there is industrial disruption at the Port, the like of which we have never seen. This is a remote possibility, and is the closest that we are likely to come to a critical uncertainty for this group.

CONCLUSIONS

Our estimates of the distribution of the population of Suffolk, according to Lifestyle Tribe, are as follows:

	Percentage
Lifestyle Tribe	Distribution
Country Dwellers	22.807%
Suburban Semis	11.842%
Blue Collar Owners	11.404%
High Income Families	10.965%
Town Houses & Flats	10.965%
Independent Elders	8.772%
Mortgaged Families	8.332%
Low Rise Council	5.702%
Victorian Low Status	5.702%
Stylish Singles	1.754%
Institutional Areas	1.316%
Council Flats	0.439%

Five groupings dominate to population by accounting for 67.9% of the population. For a rural area, it is hardly surprising that Country Dwellers account for just over a fifth of the population. What is a little more surprising is that the next four of the highest-ranking groups, accounting for 45.1% of the population, are suburban. What links the Suburban Semis, the Blue Collar Owners, the High Income Families, and the Town Houses & Flats is the issue of property ownership. What differentiates them is scale – the cost in terms of entry to these groups. The evidence suggests that this core grouping will increase out to 2020 as the size of the Country Dweller group recedes.

Of the seven remaining groups, the Independent Elders group stands out for attention. This group predominates in areas that have become, effectively, retirement colonies. Southwold and Aldeburgh spring to mind as examples of this feature. Despite their non-urban locations, many of the residents in these areas retain an urbane view of the world that has more in common with the areas that they have retired from rather a view of the world that would be indigenous to Suffolk. For example, Country Dwellers tend to be Pro-Hunting, whilst Independent Elders tend to be Anti-Hunting. It is likely that this group will grow numerically out to 2020, and it will be interesting to see how they integrate within the county over that period.

The remaining six Tribes are of lesser significance numerically. It is possible to

argue that the Mortgaged Families and Victorian Low Status groups are an extension of suburban Suffolk, but at the lower end of the property ladder. In many ways, the members of these groups demonstrate the same aspirations as those members of, say, the High Income Families or Blue Collar Owners groups. The Low Rise Council group is mainly centred on the large council estates in Ipswich, the Stylish Singles groups are a small group based in Central Ipswich, the Institutional Areas are accounted for by the American Airbases in Suffolk, and the Council Flats group is a single, anomalous, group based in Felixstowe.

During the period 1981-2001, the traditional County Dweller lifestyle groups have not grown as fast as the Independent Elders, High Income Families, and Suburban Semis lifestyle groups. The Independent Elders, particularly their concentration in the Aldeburgh-Snape-Southwold triangle, represent the development of the Suffolk Coast as a retirement location, in the same way that Dorset is a retirement location. The High Income Families and Suburban Semis lifestyle groups represent a core of commuters coming to live in Suffolk. Their concentration along the main commuter railway lines to London (Manningtree-Ipswich-Stowmarket-Diss) indicates the development of Suffolk as part of the commuter heartland of Southern England.

The immediate future between 2000 and 2010 is for the population of Suffolk to continue to grow. During this period, the official forecast is for the population to grow by 5%. We rather feel that this is likely to understate the growth of the population. The evidence for the 1990s indicates that the rate of inward migration is accelerating. If the growth rate of the population is accelerating, then forecasts based upon past growth rates will understate the growth prospects for the future population.

Looking ahead to the longer term, there is nothing to suggest that the migration process will abate. Property in Suffolk still looks cheap in comparison with the property available in, say, Surrey or Sussex (part of the commuter heartland south of London). As long as this continues, and as long as the journey from Suffolk to London takes about the same time as the journey from Sussex to London, the pressure will be for those people moving out of London to do so into the northern commuter heartlands, which now includes Suffolk. There is evidence to suggest that Suffolk property prices are very highly correlated with London City bonuses.

If we are right, then, during the next twenty years, the change of the composition of the middle class within Suffolk will continue. We can easily foresee the further development of the Suffolk Coast as a retirement location, along with the expansion of the commuter belt outwards from the main rail links. This is likely to diminish the numerical importance of the Country Dwellers and to change the face of the

county away from the rural perspective to become more suburban in outlook and presentation.

The key issue that will surface in the period 2000-2020 will be the relationship between Suffolk and London. How will the population of Suffolk interact with London? How will the migrants from London affect the nature of Suffolk? If the Country Dwellers were to be replaced by the suburban lifestyle groups, then it is likely that the county would increase its dependence upon other areas, especially London, Cambridge, and Norwich, as a source of economic well being. If, on the other hand, the Country Dwellers were to be replaced by, for example, the Independent Elders, then it is possible that Suffolk would become a more integrated community.

All in all, there are three main conclusions to our analysis. The first, despite their predominance as the single largest group, is the continued decline of the Country Dwellers within the county. The second is the growth of the suburban commuter groupings within the population. The third is the development of Suffolk as a retirement location for Independent Elders. We feel that these are the main trends that a view to 2020 should account for.

Stephen Aguilar-Millan
Director of Research
The European Futures Observatory
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EUFO Limited
6 Greenways Close
Ipswich
Suffolk
IP1 3RB



The Greenways Partnership Limited
Saracen's House
25 St Margaret's Green
Ipswich
Suffolk
IP4 2BN