

Section 4 – Projections of growth

As a baseline for planning activity published projections for the County must be considered, including projections regarding population, households and employment. These are summarised below. However, it should be recognised that these are statistical projections and tend to be very heavily based on the extrapolation of past trends. In forward planning it is essential that other factors are given due weight. This is done in subsequent sections of this document and these projections are only produced for information.

4.1 Population Projections

The most recent set of national population projections were published by the Office for National Statistics (ONS) in May of 2016¹⁸. Table 1 shows a steady growth in population levels projected at a 14% increase over the 22 year period from 2014-2036. All districts are projected to see a broadly similar level of growth of between 9% and 15% overall apart from South Norfolk that is projected to grow much more rapidly.

Table 1: Current and projected population numbers for Norfolk Districts. Source: ONS, 2016

District	2014 (000's)	2036 (000's)	Population growth 2014- 2036 (%)
Breckland	134	154	15
Broadland	126	140	11
Great Yarmouth	98	107	9
King's Lynn And West Norfolk	150	167	11
North Norfolk	103	116	13
Norwich	138	159	15
South Norfolk	129	160	24
Norfolk	878	1,002	14

It should be noted that these projections do not take into account existing planned growth such as existing commitments in the Greater Norwich Joint Core Strategy. This would suggest a somewhat different distribution of population growth between the Greater Norwich authorities.

The population projections also contain considerable information of the age profile of the population. This is potentially of considerable strategic significance for Norfolk which will have considerable implications for Local Authority services and will need to be considered in Local Plans. The projected age profiles are set out in the Table 2 and 3 below.

¹⁸Available at

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections/datasets/localauthoritiesinenglandtable2>

Table 2: Existing population numbers (000s) and % by age quantiles (2014) and projected population numbers and % by age quantiles (2036) of Norfolk Districts. Source: ONS

District	2014				2036			
	All people (000s)	000s aged 0-19 (%)	000s aged 20-64 (%)	000s aged 65+ (%)	All people (000s)	000s aged 0-19 (%)	000s aged 20-64 (%)	000s aged 65+ (%)
Breckland	134	29.4 (21.9)	72.9 (54.4)	31.7 (23.7)	153.7	31.2 (20.3)	73.5 (47.8)	49 (31.9)
Broadland	126	26.1 (20.7)	68.8 (54.6)	31.2 (24.8)	140.1	27.2 (19.4)	67.8 (48.4)	45.2 (32.3)
Great Yarmouth	98.2	22.2 (22.6)	53.4 (54.4)	22.5 (22.9)	107	22.3 (20.8)	52.7 (49.3)	31.9 (29.8)
King's Lynn And West Norfolk	150	31.8 (21.2)	81 (54)	37.1 (24.7)	166.9	34 (20.4)	79.9 (47.9)	53.2 (31.9)
North Norfolk	102.9	18.6 (18.1)	52.1 (50.6)	32.1 (31.2)	115.8	19.5 (16.8)	50.8 (43.9)	45.6 (39.4)
Norwich	137.5	30.2 (22)	86.9 (63.2)	20.4 (14.8)	158.9	35.1 (22.1)	95.9 (60.4)	27.8 (17.5)
South Norfolk	129.2	29 (22.4)	69.7 (53.9)	30.4 (23.5)	159.6	35.4 (22.2)	77.2 (48.4)	46.8 (29.3)
Norfolk	877.7	187.4 (21.4)	484.9 (55.2)	205.2 (23.4)	1002	204.7 (20.4)	497.8 (49.7)	299.4 (29.9)

Table 3: Change in 000s between 2014 and 2036. Difference between 'All People' for each district between 2014 and 2036 in %. Source: ONS

District	Difference between 2014 and 2036			
	All people (000s)	000s aged 0-19 (%)	000s aged 20-64 (%)	000s aged 65+ (%)
Breckland	19.7	1.8 (-1.64)	0.6 (-6.6)	17.3 (8.2)
Broadland	14.1	1.1 (-1.3)	-1 (-6.2)	14 (7.5)
Great Yarmouth	8.8	0.1 (-1.8)	-0.7 (-5.1)	9.4 (6.9)
King's Lynn And West Norfolk	16.9	2.2 (-0.8)	-1.1 (-6.1)	16.1 (7.2)
North Norfolk	12.9	0.9 (-1.2)	-1.3 (-6.8)	13.5 (8.2)
Norwich	21.4	4.9 (0.1)	9 (-2.8)	7.4 (2.7)
South Norfolk	30.4	6.4 (-0.3)	7.5 (-5.6)	16.4 (5.8)
Norfolk	124.3	17.3 (-0.9)	12.9 (-5.6)	94.2 (6.5)

These tables show that whilst the overall population of the County is projected to grow steadily at a relatively modest rate, the change in the age profile is more significant with over three quarters of the total increase between 2014 and 2036 being accounted for by growth in the over 65s¹⁹. The number at the older end of the age spectrum projected to increase particularly strongly; the number of over 80s is projected to almost double. Between the ages of 15 and 64 population growth is projected to be very slow, with only a 3% growth rate over the 22 year period, whilst the numbers of 0-14 years olds are projected to grow by 8.6%.

These numbers do vary somewhat between individual districts (with Norwich being notably less affected by an ageing population) but the growth in the elderly population is projected to affect most parts of the County and will create significant issues given current models for funding social care and education provision. These issues are not considered further in the framework but the issues relating to housing are considered further in the housing section below.

4.2 Household Projections

The most recent set of household projections were published by Department for Communities and Local Government (DCLG) in July 2016²⁰. These show that due to demographic changes households will increase at a marginally faster rate than population. Similar patterns of growth are shown as for population but again it should be noted that these projections do not take into account growth planned in existing Local Plans which may influence the scale and distribution of the growth in households.

Table 4: Past and present household numbers with future household projections. Source: ONS

District	1991 (000's)	2001 (000's)	2014 (000's)	2036 (000's)	Household growth 2014- 2036 (%)
Breckland	44	51	56	68	21
Broadland	43	50	54	63	17
Great Yarmouth	36	39	43	50	16
King's Lynn and West Norfolk	53	58	64	74	16
North Norfolk	38	44	47	56	19
Norwich	54	55	62	74	19
South Norfolk	42	47	55	70	27
Norfolk	310	344	383	453	18

It should also be noted that much of the household growth projected between 2014 and 2036 can be accommodated by housing for which provision has already been made through planning permissions and/or allocations made in existing Local Plans.

¹⁹ Total growth in population age 65 plus is 95,000

²⁰ See <https://www.gov.uk/government/statistical-data-sets/live-tables-on-household-projections>

4.3 Employment Projections

Across the East of England Local Authorities use the East of England Forecasting Model (EEFM) to better understand the development needs of their area. The model provides a set of baseline forecasts designed to facilitate the setting of consistent housing and jobs targets and can also provide a means of generating alternative scenarios. It is prepared by the independent forecasting house Cambridge Economics and further information about the model and details of runs published are available online²¹.

Table 5 sets out the headline results for Norfolk Districts produced in the 2016 run of the model. As with any forecast model, these results need to be treated with a degree of caution. They are “policy neutral” and assume that policy context in the future remains broadly as it has in the past. They cannot reflect the impact of any recent or future interventions that may be made through infrastructure investment, Economic Strategies or Local Plans. In addition, the reliability of a number of the underlying datasets decreases at smaller scales, and economic activity is not limited by council boundaries, so individual sector and District forecasts should be treated as being broadly indicative.

Overall the model shows that without additional intervention total job levels in the Norfolk economy are projected to grow at relatively modest rates over the next 20 years with most of the growth projected taking place within Greater Norwich. If the aims of the City Deal are added to the model’s forecasts, it projects that over 75% of all the net growth in Norfolk will take place in Greater Norwich.

Table 5: Current total employment with projected jobs levels and growth. Source: EEFM 2016 and Central Norfolk SHMA

Districts	Current total employment (000's)			Projected jobs levels 2036 (000's)	2014-2036 growth (000's)
	2012	2014	2016		
Breckland	52.4	56.1	55.3	56.7	0.6
Broadland	53.8	52.8	55.7	57.8	5.0
Great Yarmouth	43.7	44.0	45.1	49.7	5.7
King’s Lynn & West Norfolk	65.4	67.4	68.4	72.8	5.4
North Norfolk	39.2	41.2	41.8	43.7	2.5
Norwich	93.0	92.9	99.4	110.9	18
South Norfolk	58.5	59.5	60.3	70.8	11.3
Greater Norwich*	205.3	205.2	215.4	251.3**	46.1
Norfolk	406.0	413.8	426.0	474.3**	60.5

*Broadland, Norwich & South Norfolk

**City Deal additional 11,800 jobs added but not broken down between GN Districts

²¹ See <http://cambridgeshireinsight.org.uk/EEFM>