Greater Norwich Development Partnership

Topic Paper: Homes and Housing

Joint Core Strategy for Broadland, Norwich and South Norfolk

Addressing the Judgment of Mr Justice Ouseley in Heard v Broadland District Council, South Norfolk District Council and Norwich City Council

December 2012

Jobs, homes, prosperity for local people

Norwich City Council South Norfolk Council Norfolk County Council Broads Authority

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1. Summary

1.1. This topic paper provides evidence to support the dwelling provision in Policy 4 of the Joint Core Strategy (JCS). First produced in 2010 to support the JCS examination, a draft revision was provided in July/August 2012 to support pre-submission publication of the remitted parts of the JCS. It has been further revised in December 2012 to support decisions on submission. Revisions since the original have taken account of the adoption of the National Planning Policy Framework. The Topic Paper also incorporates clarifications of the text, revised occupancy rate calculations, and information that has emerged since the original report. The latter includes, the 2011 updated Housing Market Assessment, results from the 2011 Census, and ONS interim 2011-based population projections. The ongoing release of additional data from the 2011 Census may have further implications.

1.2. The different projections and forecasts produce a range of estimates of housing requirement. JCS provision sits well within this range and is considered to be consistent with Government Policy. The Topic Paper concludes that provision is entirely appropriate and necessary to deliver on all reasonable estimates of need.

2. Introduction

2.1. This topic paper provides evidence to support the dwelling provision in Policy 4 of the Joint Core Strategy (JCS). It is an updated version of the paper requested and accepted by Inspectors at the first JCS examination[1]. It was revised to take account of new information in July/August 2012 to support the pre-submission publication and has been further revised in December 2012 to support decisions on submission. The ongoing release of additional data from the 2011 Census may have further implications.

2.2. The JCS requires allocations to be made to ensure that at least 36,820 new homes can be delivered between 2008 and 2026. However, the locational policies of the JCS provide a range for the scale of allocations in a number of settlements outside the Norwich Policy Area. Taking this flexibility into account, total allocations across the whole JCS area could provide for a minimum of 37,750 dwellings.

2.3. Forecasting the need for new housing is not an exact science and the sources of evidence identified in this paper provide a range of potential needs. The values at the lower end of the range are more likely to underestimate need, as they tend to take insufficient account of demographic trends or economic growth potential, and would not respond to the Government's commitment to boost significantly the supply of housing[2]. The upper end tend to be based on projections of past demographic trends that may be unrealistic and suggest levels of growth that are untenable in terms of infrastructure requirements, environmental impact and evidence of the market's ability to deliver. JCS provision falls well within the indicated range and because it is limited to allocated land, and takes no account of windfall development that takes place after the level of allocation is determined, it provides sufficient flexibility to deliver on all reasonable requirements.

2.4. This Topic Paper demonstrates that, irrespective of Government's continued commitment to revoke the East of England Plan, the Joint Core Strategy targets remain consistent with the National Planning Policy Framework's requirement to plan for the "objectively assessed needs for market and affordable housing"[3].

3. Background

3.1. The JCS was adopted in March 2011. A legal challenge to the adoption of the JCS was received on 3 May 2011 from Stephen Heard, Chairman of Stop Norwich Urbanisation. High Court Judge Mr Justice Ouseley made his judgment on 24 February 2012 (Document LC1) and published his final order (Document LC2) on 25 April 2012.

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[1] Available on the GNDP website http://www.gndp.org.uk/our-work/joint-core-strategy/evidence-base/ Topic Paper EIP70

[2] National Planning Policy Framework 2012, paragraph 47.

[3] National Planning Policy Framework 2012, paragraph 47.

3.2. Mr Justice Ouseley found that parts of the Joint Core Strategy concerning the Broadland part of the Norwich Policy Area, including the North East Growth Triangle (a total of 9,000 dwellings in the plan period) should be remitted for further consideration and that a new Sustainability Appraisal for these issues be prepared

3.3. Broadland District Council, Norwich City Council and South Norfolk Council, together with Norfolk County Council have continued to work together as the Greater Norwich Development Partnership (GNDP). The Partnership has undertaken further work to reconsider the remitted parts of the JCS.

3.4. The levels of housing provision required by the JCS both for the area as a whole and for the Norwich Policy Area, were not remitted and remain adopted. Consequently, the order does not require the reconsideration of housing provision. Nevertheless, this paper demonstrates why the adopted housing totals in the JCS continue to provide a sound context for the re-submission of the remitted parts of the strategy.

4. Government Policy

4.1. As part of the definition of the presumption in favour of sustainable development the NPPF requires that:

> "Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless … any adverse impacts of doing so would significantly and demonstrably outweigh the benefits"

4.2. The core planning principles of the National Planning Policy Framework (paragraph 17) require planning to:

> "proactively drive and support sustainable economic development to deliver the homes … and thriving local places that the country needs. Every effort should be made objectively to identify and then meet the housing … needs of an area, and respond positively to wider opportunities for growth. Plans should take account of market signals, such as land prices and housing affordability"

4.3. To deliver sustainable development the NPPF seeks "To boost significantly the supply of housing". To achieve this "local planning authorities should use their evidence base to ensure that their Local Plan meets the full, objectively assessed needs for market and affordable housing in the housing market area" (paragraph 47).

4.4. Paragraph 159 requires local planning authorities to have a clear understanding of housing needs in their area. They should:

- prepare a Strategic Housing Market Assessment to assess their full housing needs, working with neighbouring authorities where housing market areas cross administrative boundaries. The Strategic Housing

Market Assessment should identify the scale and mix of housing and the range of tenures that the local population is likely to need over the plan period which:
   - meets household and population projections, taking account of migration and demographic change;
   - addresses the need for all types of housing, including affordable housing and the needs of different groups in the community (such as, but not limited to, families with children, older people, people with disabilities, service families and people wishing to build their own homes); and
   - caters for housing demand and the scale of housing supply necessary to meet this demand;
- prepare a Strategic Housing Land Availability Assessment to establish realistic assumptions about the availability, suitability and the likely economic viability of land to meet the identified need for housing over the plan period.

4.5 The remainder of this paper demonstrates how the authorities have taken account of various measures of housing need. It also demonstrates that the JCS delivers the requirements of the NPPF as it seeks to boost housing supply significantly, supports economic growth potential and has sufficient flexibility to deal with rapid change.

5. The East of England Plan

5.1. Although it is still the Government's intention to revoke the East of England Plan, at the time of writing it remains in force. Moreover, the evidence that supports it will remain relevant even after revocation.

5.2. The housing targets in the adopted East of England Plan to 2026 were accepted by all the GNDP authorities subject to the provision of the necessary supporting infrastructure and jobs. For the period 2008-2026 the East of England Plan target, taking into account past completions 2001-2008, was a **minimum of 35,660 dwellings** (or 1,980 per annum).

5.3. To ensure the East of England Plan to 2026 was met, and to provide the opportunity for local choice and flexibility to meet housing need in more rural parts of the area, the GNDP partners decided to increase the provision in the JCS slightly above that required by the East of England Plan. Consequently, the JCS provision is **36,820 dwellings** (or 2,050 per annum) with 33,000 dwellings in the Norwich Policy Area. The locational policies of the JCS outside the NPA allow for a slightly higher level of growth bringing the total for the area as a whole to a potential 37,750 dwellings (or 2,100 per annum).

5.4. Prior to the decision to revoke regional strategies, a review of the East of England Plan was underway which included housing provision as put forward by constituent local authorities. For the GNDP area provision equating to 2,100 dwellings per annum was proposed. This is equivalent to the top end of JCS provision over the 18 years 2008 to 2026. However, it should be noted that the review was for the period 2011-2031, with no requirement to address any backlog, and the GNDP proposals were made in the context of constrained delivery in much of the rest of Norfolk. More significantly they were absolutely conditional on the provision of supporting infrastructure and in particular the Norwich Northern Distributor Road.

6. Local and sub-regional evidence of need and demand

6.1. The Strategic Housing Market Assessment (SHMA) for the GNDP area estimates a housing requirement over a period of five years. The original study (Document H2) was for the period 2006-2011 and this has been revised and updated originally for the period 2009-2014 (Document H4) and again for the period 2011-2016 (Document H7).

6.2. The revised study identifies a total need for housing of 2,076 per annum of which 962 would be affordable. In reaching these targets the HMA analysis includes an allowance of 1,406 affordable dwellings required to meet the backlog in 2006 and adds this to newly arising need. The backlog identified in the initial study has not been met in the intervening period and therefore the analysis in this Topic Paper assumes it remains at broadly the same level. In order to use the SHMA data to indicate need over the JCS period it is necessary to take out the affordable backlog, extrapolate the remaining annualised need over the JCS period and then add the backlog back in. This indicates a need for dwellings to accommodate 33,468 households. To convert to a dwelling requirement it is necessary to take account of un-occupied dwellings. In the 2001 Census there were 3.7% more dwellings than households. Dwellings not occupied by households include holiday homes, 2nd homes, and vacant dwellings awaiting probate or in the process of being renovated, sold or let. Assuming a need for 3.7% more dwellings than households, the HMA indicates a need for around **34,700 dwellings**. However, this total dwelling requirement is potentially an underestimate, as the SHMA analysis takes no account of demographic trends after 2011. Moreover the proportion of affordable housing would need to be around 39% of the total dwelling requirement to meet the need for affordable housing. This is extremely unlikely to be achieved as it significantly exceeds the proportion sought by Policy 4 of the JCS.

6.3. Policy 4 seeks a maximum of 33% affordable housing to be provided on larger sites. If an average of 33% affordable housing could be achieved across <u>all</u> sites, a total of around **40,650 dwellings** would be needed to address the projected need for affordable housing. Policy 4 applies lower rates to smaller sites and also recognises that the affordable housing contribution on any site can be reduced to take account of viability. This will reduce the overall proportion of affordable housing from market sites below the 33% average. While some sites will come forward for 100% affordable housing, such as rural ‘exceptions’ sites, this cannot be expected to redress the balance. Therefore, total growth would need to exceed 40,650 dwellings to fully meet the identified need for affordable housing. For example, if the proportion of affordable housing achieved was to be 5 percentage points lower at 28% (and this is a historically high figure) then a total of around **47,900 dwellings** would be required.

6.4. The level of affordable housing need in the area is strongly influence by need arising from Norwich. It is particularly important therefore, that a high proportion of total provision is targeted on the Norwich Policy Area. This is consistent with the NPPF requirement to meet unmet need from neighbouring authorities where it is reasonable to do so and consistent with achieving sustainable development.

6.5. A long-term analysis of house prices has not been undertaken, as it would not be expected to be useful given the current economic climate and issues with the housing market. However the impact of house prices in relation to household incomes has formed part of both the original SHMA and the updates in 2009 and 2011.

7. NHPAU advice

7.1. While the NHPAU has now been disbanded, its evidence, although somewhat out of date, is still available via the DCLG website. It projected requirements for the GNDP area for the JCS time frame (2008-2026) range between 43,100 and 53,800 dwellings.

7.2. The lower requirement is derived from 2006-based demographic projections and provides for household growth but does not include housing for existing hidden households. The upper requirement reflects the level of supply considered by the NHPAU to be required to stabilise the affordability of market housing. With the demise of the NHPAU there is no authoritative analysis of how the affordability issue has been affected by the downward pressure on house prices in the current market.

7.3. Because this evidence is considered to be out of date it has not been included in the final evidence comparison table (Table 1 on p15).

8. The Government's latest population projections

8.1. The most recent full ONS population projections are 2010-based. ONS has more recently produced interim 2011-based projections for the period to 2021. These more recent projections imply slightly higher population growth. ONS projections are largely derived from trends over the previous 5 years and show what would happen in terms of population growth if these trends were to be continued forward.

8.2. 2010-based ONS projections for the GNDP area suggest a total population of around 430,000 people at 2026 resulting from a growth of 60,100 people from 2008. The 2011-based interim projections imply an increase of 63,150 people for the same period. In the absence of up to date household projections, a simplified method for deriving a dwelling requirement resulting from this population can be based on average occupancy rates (the average number of people per dwelling i.e. the total population divided by the total number of dwellings). The method assumes that factors such as the proportion of the population that are not household residents remain constant.

8.3. Occupancy rates have tended to decline over time, largely reflecting falling average household size. Between 1991 and 2001, the occupancy rate fell in all three districts. The rate for the area as a whole fell by 0.09 people per dwelling over the decade to an average of 2.24 in 2001. It is possible to calculate an occupancy rate for 2008 and also for 2011 but there are question marks around the derived dwelling stock for these two years and its compatibility with the Census (unfortunately different measures of current stock vary significantly and dwelling stock from the 2011 Census is not available at the time of writing). Assuming that stock is the sum of dwellings recorded in the 2001 Census plus subsequent net completions, the 2008 occupancy rate for the GNDP area as a whole appears to have fallen to 2.20 people per dwelling or a pro rata decline of 0.06 people per dwelling per decade. The rate appears to be 2.21 in 2011 which is a decline of 0.03 per decade from 2001 or 0.06 per decade from 1991. The 2011 Census also indicates a levelling off of the decline in the related measure of household size. There is some evidence nationally to show that migration from the EU Accession Countries post 2004 has slowed the long term downward trend with some international migrants living at considerably higher occupancy rates than current averages. In addition, and possibly of greater impact, the recent economic climate has made it more difficult for people to access finance and therefore constrained some households from forming and moving into their own homes. While these pressures for enforced sharing may not be considered to be socially acceptable or sustainable by all those affected, it is unclear if and when a return to a more pronounced downward trend will occur.

8.4. If the occupancy rate for the GNDP area as a whole continues to fall at the assumed 2001-2011 rate the ONS population projections imply a requirement for an additional **31,500 dwellings (2010-based) or 32,950 dwellings (2011-based) dwellings**. Alternatively a continuation of the rates of decline for 2001-2008 or 1991-2011 would imply a requirement for an additional **37,250 dwellings (2010-based) or 38,750 (2011-based)**. If the fall in occupancy rates follows the average fall between 1991 and 2008 (17 years, almost the same period as the JCS) the dwelling requirement would be **40,250 dwellings (2010-based) or 41,750 dwellings (2011-based)**. Alternatively, if rates were to fall at the 1991-2001 rate the requirement would be for **42,300 dwellings (2010-based) or 43,850 dwellings (2011-based)**.

9. Household projections

9.1. The latest CLG household projections are 2008-based. These projections are largely derived from trends over the previous 5 years and show what would happen in terms of household growth if these trends were to be continued forward.

9.2. CLG 2008-based household projections indicate that between 2008 and 2026 there will be an additional **44,000 households** in the GNDP area.

9.3. As discussed in Section 8, there are more dwellings in the area than households. In order to assess how many dwellings might be needed to accommodate the projected increase in households the relationship between the two measures at the time of the 2001 Census can be used. At this time there were approximately 3.7% more dwellings than households in the GNDP area. If this is applied to the above then the projected increase in households would require an additional **45,650 dwellings**.

9.4. This estimate of housing need may now be considered to be too high as these household projections are based on ONS 2008 mid-year estimates which have since been revised downward in the indicative mid-year estimates for Norwich. However, it is not possible to understand the impact of this until new household projections are published in 2013.

10. Dwelling requirement to support the local economy

10.1. The East of England Forecasting Model (EEFM) is a genuine economic forecasting tool currently operated by Oxford Economics with results posted on Cambridgeshire County Council's website. It is grounded in models of the international and national economy and uses local intelligence on economic structure, output, employment, population and housing to forecast each variable. The dwelling forecast applies a linear trend for occupancy ratios to economically driven increases in population. The most recent baseline forecast undertaken in spring 2012 suggests an additional **43,000 dwellings** will be needed between 2008 and 2026 to support the growth potential of the local economy. In addition, 2 further scenarios were investigated. A "lost decade" scenario assumes very low economic growth to 2017 and also forecasts a dwelling requirement of just under **43,000 dwellings**. A third scenario incorporates ONS international migration data, which is higher than in the baseline model, and produces a dwelling requirement of just over **46,000 dwellings.** A series of variants have also been run to assess the impact of official and flat occupancy ratios on the three scenarios. This results in six further potential outcomes ranging from 36,000 to 49,000 dwellings.

11. Strategic Housing Land Availability Assessment (SHLAA)

11.1. The GNDP SHLAA Stage 8 report suggests that total constrained supply could be **42,000 dwellings** up to and beyond 2024. The GNDP target is below this constrained supply, allowing some capacity for growth provision in later plans. Moreover, many of the constraints indicated in the SHLAA can be overcome.

11.2. The SHLAA site threshold outside of the built-up area is one hectare, which effectively excludes garden land. Similarly the SHLAA has a density assumption of 30 dwellings per hectare and this is believed to still be a realistic density in the Greater Norwich area.

11.3. In the built-up area the SHLAA assumed the density of development would be 100 dwellings per hectare in the city centre and 50 dwellings per hectare in the rest of the city. The average densities for the city as a whole were about 90 dwellings per hectare between 2007 and 2010. The City's Site Allocation DPD (pre-submission publication version August 2012) demonstrates that additional allocations for 3,370 dwellings can be achieved in the City Council area, therefore demonstrating the ability to accommodate the level of growth set out in the Joint Core Strategy.

11.4. In urban areas outside the built-up area of Norwich the assumption of 40 dwellings per hectare is also considered to be a reasonable assumption for an average density.

12. Increased supply

12.1. Net completions in the 10 years 2001-2011 average 1,596 dwellings per annum. If delivery continues at this rate then **28,750 dwellings** would be completed between 2008 and 2026.

12.2. Recent completions represent the market's ability to deliver during a period that saw a range of economic conditions. They also reflect planning policy. During the period all three Local Planning Authorities adopted Local Plans in which they made significant housing allocations. These allocations were based on a Structure Plan requirement formulated in the 1990s that equated to 1500 dwellings per annum. Therefore delivery was consistent with the strategic target. Nevertheless, the rate of completions over the last 10 years or so indicate the scale of the challenge if significantly higher rates of development are to be achieved in the longer term. The Government are expecting the planning system to boost significantly the supply of housing[4]. Therefore, past completions provide a context for assessing future delivery rates rather than evidence of housing need.

13. The role of windfall development

13.1. JCS provision is intended to be delivered through allocations so windfall development after allocations are identified will be additional. Reasonable assumptions about windfall development have been included in key evidence supporting the JCS. Delivery of close to 5,000 additional dwellings is illustrated (but not included in the totals) in the JCS trajectory for the GNDP area as a whole in the period after allocations are expected to be finalised. This is quite conservative compared to windfall development rates previously experienced but may be reasonable in a planning system which is intended to positively allocate sites to meet need. The potential for windfall development will also be influenced by the extent of 'development boundaries' in site specific allocations DPDs and the protection of sites for non-housing uses, as well as by development management policies relating to issues such as density, conversions and redevelopments etc. Consequently, allocations to meet the JCS provision plus windfalls could deliver in the region of **42,000 dwellings**. This amount of development is very similar to all but the highest estimates of need. Clearly windfall development will not be delivered as additional development if there is no market demand – the sites may still come forward but there would be a consequent reduction in rates of delivery on allocations.

[4] National Planning Policy Framework 2012, paragraph 47.

Consequently, windfall development provides sufficient flexibility to address uncertainty arising from the wide range of assessments of need.

14. Housing trajectory and deliverability

14.1. Market demand, and the ability and commitment of the development industry to meet it, will largely determine whether housing trajectories are met. The degree of public investment in affordable dwellings will also play a role. The strategy enables and facilitates delivery but market conditions will determine delivery rates. At the 2008 base date the commitment was 14,000 dwellings. These will provide for much of the delivery in the early years of the plan period. Since 2008 around 5,000 dwellings have been completed and a significant number of new permissions granted. Over the plan period as a whole newly allocated sites will be the critical element for meeting the JCS housing trajectory. New allocations required by the JCS cover a wide range of scales and locations. This flexibility aids delivery.

14.2. Past trends indicate that, in reasonable market conditions, each of the districts can deliver significant levels of growth. The challenge to the development industry will be to ensure that strong growth rates can be maintained across all three districts at the same time.

14.3. The trajectories are indicative of the potential for growth and do not impose any phasing or restriction. Norwich and South Norfolk are well advanced in the production of site allocations documents indicating a strong likelihood that delivery on new allocations can be achieved in accordance with the JCS Housing Trajectory. The development of site specific policies in Broadland has been delayed as a result of the High Court Order. However, the combination of developer proposals which are coming forward in parallel with the development plan process, and the granting of permission to appropriate schemes that accord with adopted and emerging policies, indicate that across the area as a whole there is a good chance that sites can come forward in an appropriate timescale to broadly meet the JCS Housing Trajectory.

15. Conclusion

15.1. All the illustrated rates are dependent on the market's ability to deliver and the timely provision of essential infrastructure.

15.2. Evidence supporting the JCS demonstrates that growth in excess of that being provided for would increase significantly the likely environmental consequences of development and potentially run into even greater infrastructure constraints. There is also little or no evidence that the market could deliver higher rates of growth. A lower level of development could be artificially constraining housing delivery, with consequent impacts on economic development and housing affordability and wider 'knock-on' effects that this would have. A lower target could not deliver sufficient "affordable housing". A lower housing target is also likely to be judged in conflict with the requirement of the National Planning Policy Framework to plan for "the full, objectively assessed needs for market and affordable housing" and "respond positively to wider opportunities for growth"[5].

15.3. It can therefore be concluded that JCS provision is entirely appropriate and necessary to deliver on all reasonable estimates of need.

[5] National Planning Policy Framework 2012, paragraph 47.

Table 1: Comparison of JCS provision and dwelling requirement derived from a range of sources

Source of estimate	Dwellings (round to 50)	Note:
Past completions	28,750	Based on completion rates 2001-2011, this is not an estimate of need.
ONS 2010 pop projection	31,500	Occupancy rate falling at 2001-2011 rates
ONS 2011 pop projection	32,950	Occupancy rate falling at 2001-2011 rates
SHMA with 39%affordable	34,700	Takes no account of demographic trends after 2011. Affordable need would be an unachievable proportion
East of England Plan	35,660	Expressed as a minimum
JCS provision	**36,820 – 37,750**	**Not including potential windfall development**
ONS 2010 pop projection	37,250	Occupancy rates falling at 2001-2008 and 1991-2011 rates
ONS 2011 pop projection	38,750	Occupancy rates falling at 2001-2008 and 1991-2011 rates
ONS 2010 pop projection	40,250	Occupancy rates falling at 1991-2008 rates
SHMA with 33%affordable	40,650	Total dwellings to deliver affordable need if 33% is affordable
ONS 2011 pop projection	41,750	Occupancy rates falling at 1991-2008 rates
JCS plus windfall	**42,000**	**JCS provisions plus windfall**
ONS 2010 pop projection	42,300	Occupancy rates falling at 1991-2001 rates
EEFM 2012 baseline and “lost decade”	43,000	Requirement to support local economic growth potential. Spring 2012 economic forecasts baseline and “lost decade” scenarios
ONS 2011 pop projection	43,850	Occupancy rates falling at 1991-2001 rates
Household projections	45,650	CLG 2008 based, converted to dwellings to allow for household/dwelling ratio
EEFM 2012 “high migration”	46,000	Requirement to support local economic growth potential. Spring 2012 “high migration” scenario
SHMA with 28% affordable	47,900	Total dwellings to deliver affordable need if 28% is affordable (illustrative assumption)

Appendix 1 – Local and Sub-Regional Evidence

SHMA Calculation Updated

Total requirement per annum*	2,076	a
Less annualised affordable backlog**	300	b
Total arising requirement per annum	1,776	a-b
Multiply by JCS period years	18	c
Total requirement over JCS period	31,968	c x (a-b)
Add back in affordable backlog total	1,500	d
Total requirement including backlog	33,468	c x (a-b) + d
Total requirement for dwellings (assuming 3.7% more dwellings than households as in 2001 Census)	34,706	e x 1.037

Affordable Housing Element

HMA Affordable housing need per annum including backlog* (a)	962	a
Less annualised affordable backlog**	300	b
Affordable need arising per year	662	a-b
Multiply by JCS period years	18	c
Affordable need arising over JCS period	11,916	c x (a-b)
Add back in affordable backlog total (300 p.a. for 5 years)	1,500	d
Affordable need arising including backlog	13,416	c x (a-b) + d

* Greater Norwich Housing Market Assessment UPDATE November 2009, page 20
** Affordable backlog was 1,403 in 2006; estimated at 1,500 in 2009

Affordable Housing Delivery Rates

Affordable need arising in JCS period, including backlog	13,416
If this forms 33% of completions, total completions would need to be	40,650
If this forms 28% of completions, total completions would need to be	47,910

34,706 dwellings, of which 39% would be affordable dwellings, according to Strategic Housing Market Assessment methodology, extrapolated over 18 years

40,650 dwellings to meet affordable need, assuming 33% of completions are for affordable dwellings

47,910 dwellings to meet affordable need, assuming 28% of completions are for affordable dwellings

Appendix 2 – ONS Population Projections

A) 2010-based

GNDP Indicative Population Estimate 2008	GNDP Population Projection 2026 (2010 based)	Increase in Population
369,900	430,000	60,100

GNDP:	Population	Dwellings	Occupancy (rounded)	Pro rata change over 10 years
1991 Census	329,799	141,585	2.33	
2001 Census	350,773	156,745	2.24	0.09
Net completions 01-08		11,758		
2008 Indicative Estimate	369,900	168,500	2.20	0.06
Net completions 08-11		4,140		
2011 Indicative estimate	381,200	172,640	2.21	0.03

Occupancy Rate Scenarios – rates pro rata over 18 years

Population 2026	Occupancy rates	Dwellings
430,000	2.15	200,000
430,000	2.09	205,740
430,000	2.06	208,740
430,000	2.04	210,780

	a) 2001-2011 rate of falling occupancy	b) 2001-2008 and 1991-2011 rate of falling occupancy	c) 1991-2008 rate of falling occupancy	d) 1991-2001 rate of falling occupancy
Dwellings Based On:	2.15	2.09	2.06	2.04
Total dwellings	200,000	205,740	208,740	210,780
Less 2008 Stock	168,500	168,500	168,500	168,500
Additional Homes Needed	31,500	37,240	40,240	42,280

B) Interim 2011-based

The Interim 2011-based projections incorporate data from the 2011 Census but only provide projections to 2021. The following projects forward on a straight line basis to 2026.

GNDP Indicative Population Estimate 2008	GNDP Population Projection 2026 (2010 based)	Increase in Population
370,000	433,150	63,150

GNDP:	Population	Dwellings	Occupancy (rounded)	Pro rata change over 10 years
1991 Census	329,799	141,585	2.33	
2001 Census	350,773	156,745	2.24	0.09
Net completions 01-08		11,758		
2008 Indicative Estimate	370,000	168,500	2.20	0.06
Net completions 08-11		4,140		
2011 Indicative estimate	381,200	172,640	2.21	0.03

Occupancy Rate Scenarios – rates pro rata over 18 years

Population 2026	Occupancy rates	Dwellings
433,150	2.15	201,470
433,150	2.09	207,250
433,150	2.06	210,270
433,150	2.04	212,330

	a) 2001-2011 rate of falling occupancy	b) 2001-2008 and 1991-2011 rate of falling occupancy	c) 1991-2008 rate of falling occupancy	d) 1991-2001 rate of falling occupancy
Dwellings Based On:	2.15	2.09	2.06	2.04
Total dwellings	201,470	207,250	210,270	212,330
Less 2008 Stock	168,500	168,500	168,500	168,500
Additional Homes Needed	32,970	38,750	41,770	43,830

Appendix 3 – CLG Household Projections

CLG 2008-based Estimate Households	165,000	a
CLG 2008-based 2026 Projection Households	209,000	b
Difference Over 18 Years	44,000	b-a

Relationship between households and dwellings at census

2001 Census	Households	Dwellings	% Difference
GNDP	151,198	156,745	3.7%

Household/dwelling relationship applied to projections

CLG 2008	Households	% Difference	Dwellings
	44,000	3.7%	45,628

45,628 dwellings to accommodate increased households, 2008-based projections

Appendix 4 - Exerts from EEFM 2012

EEFM Greater Norwich Baseline																			
					Table 1: Key indicators										**Table 1: Key indicators**				
	2008	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**	**2025**	**2026**
Demography																			
Total population	378.1	382.8	389.0	395.5	401.6	407.4	412.5	417.2	421.5	425.6	429.4	433.2	436.8	440.4	443.9	447.3	450.5	453.7	456.8
Working age population	232.5	235.4	239.7	240.6	244.4	248.0	251.2	254.2	257.1	260.3	263.4	267.2	271.2	273.1	274.5	275.8	277.0	277.8	278.6
Migration & other changes	6.1	4.6	5.4	5.7	5.2	4.8	4.1	3.7	3.3	3.1	3.0	2.9	2.8	2.8	2.7	2.6	2.6	2.6	2.6
Labour market																			
Employees in employment	177.3	173.3	170.3	175.3	177.0	179.8	183.1	186.1	188.2	189.9	191.1	192.0	192.9	193.6	194.3	195.0	195.6	196.2	196.7
Self employed	30.2	30.4	33.3	33.5	33.6	33.8	34.4	34.9	35.3	35.4	35.5	35.7	35.8	36.0	36.1	36.2	36.3	36.4	36.5
Total employment (jobs)	207.5	203.7	203.6	208.8	210.6	213.6	217.5	221.0	223.5	225.4	226.7	227.7	228.7	229.6	230.4	231.2	231.9	232.6	233.3
Total workplace employed people	187.4	184.8	185.2	189.7	191.3	194.1	197.6	200.8	203.0	204.7	205.8	206.7	207.6	208.4	209.1	209.8	210.5	211.1	211.7
Residence employment	184.9	181.7	185.5	188.2	189.5	191.8	194.9	197.7	199.6	201.1	202.1	202.8	203.6	204.2	204.8	205.3	205.8	206.3	206.8
Residence employment rate	66.1	64.1	64.3	64.2	63.7	63.6	64.0	64.3	64.4	64.4	64.3	64.2	64.2	64.0	64.1	64.0	63.9	63.7	63.6
Net commuting	2.5	3.1	-0.3	1.4	1.8	2.3	2.7	3.1	3.4	3.6	3.8	3.9	4.1	4.2	4.4	4.5	4.7	4.8	4.9
Unemployment level	4.5	7.4	7.3	7.3	8.3	8.6	8.7	8.7	8.4	8.0	7.7	7.5	7.5	7.5	7.5	7.5	7.4	7.4	7.3
Unemployment rate	1.9	3.1	3.0	3.0	3.4	3.5	3.5	3.4	3.3	3.1	2.9	2.8	2.8	2.7	2.7	2.7	2.7	2.6	2.6
Output																			
Total GVA	7737.6	7299.3	7522.9	7673.9	7837.6	8061.5	8364.7	8660.6	8934.6	9192.8	9444.3	9687.8	9922.9	10146.2	10371.2	10602.6	10837.4	11075.3	11316.0
Labour productivity	37.3	35.8	36.9	36.8	37.2	37.7	38.5	39.2	40.0	40.8	41.7	42.6	43.4	44.2	45.0	45.9	46.7	47.6	48.5
GVA per capita	20.5	19.1	19.3	19.4	19.5	19.8	20.3	20.8	21.2	21.6	22.0	22.4	22.7	23.0	23.4	23.7	24.1	24.4	24.8
Housing																			
Households	159.3	161.1	165.6	167.0	170.0	172.8	175.4	177.7	180.0	182.1	184.2	186.2	188.2	190.2	192.2	194.1	195.9	197.7	199.5
Demand for dwellings	165.2	167.0	171.7	173.2	176.3	179.2	181.8	184.3	186.6	188.9	191.0	193.1	195.2	197.2	199.3	201.2	203.2	205.1	206.9

EEFM Greater Norwich "Lost Decade"																			
					Table 1: Key indicators									**Table 1: Key indicators**					
	2008	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**	**2025**	**2026**
Demography																			
Total population	378.1	382.8	389.0	395.5	401.7	407.6	412.9	417.7	422.0	425.9	429.8	433.6	437.5	441.4	445.1	448.7	452.2	455.6	458.9
Working age population	232.5	235.4	239.7	240.7	244.4	248.1	251.5	254.4	257.2	260.0	262.8	266.6	270.7	272.8	274.3	275.8	277.1	278.1	279.1
Migration & other changes	6.1	4.6	5.4	5.7	5.2	4.9	4.3	3.8	3.4	3.0	2.9	3.0	3.1	3.0	3.0	2.9	2.8	2.8	2.8
Labour market																			
Employees in employment	177.3	173.3	170.3	176.6	178.4	179.4	180.4	181.4	182.1	182.7	183.1	183.6	184.3	185.2	186.0	186.8	187.5	188.2	188.9
Self employed	30.2	30.4	33.3	33.9	34.1	34.1	34.3	34.4	34.5	34.5	34.4	34.5	34.6	34.8	34.9	35.1	35.2	35.3	35.5
Total employment (jobs)	207.5	203.7	203.6	210.6	212.5	213.6	214.7	215.9	216.6	217.2	217.6	218.0	218.9	219.9	220.9	221.9	222.8	223.6	224.4
Total workplace employed people	187.4	184.8	185.2	191.2	193.0	194.0	195.1	196.1	196.7	197.2	197.6	198.0	198.7	199.7	200.5	201.4	202.2	202.9	203.6
Residence employment	184.9	181.7	185.5	189.6	190.9	191.5	192.3	193.2	193.7	194.1	194.3	194.6	195.2	195.9	196.7	197.3	198.0	198.6	199.2
Residence employment rate	66.1	64.1	64.3	64.7	64.2	63.5	63.1	62.8	62.4	62.1	61.9	61.6	61.5	61.5	61.6	61.5	61.5	61.3	61.2
Net commuting	2.5	3.1	-0.3	1.7	2.2	2.5	2.7	2.9	3.0	3.1	3.3	3.4	3.5	3.7	3.9	4.0	4.2	4.3	4.5
Unemployment level	4.5	7.4	7.3	7.3	8.2	9.1	9.9	10.5	10.7	10.6	10.6	10.7	11.0	11.1	11.1	11.1	11.1	11.1	11.1
Unemployment rate	1.9	3.1	3.0	3.0	3.4	3.7	4.0	4.1	4.2	4.1	4.0	4.0	4.1	4.1	4.1	4.0	4.0	4.0	4.0
Output																			
Total GVA	7737.6	7299.3	7522.9	7725.1	7901.2	8058.5	8260.3	8463.9	8664.7	8870.0	9080.9	9297.5	9520.3	9748.0	9976.5	10211.2	10449.1	10690.1	10933.9
Labour productivity	37.3	35.8	36.9	36.7	37.2	37.7	38.5	39.2	40.0	40.8	41.7	42.6	43.5	44.3	45.2	46.0	46.9	47.8	48.7
GVA per capita	20.5	19.1	19.3	19.5	19.7	19.8	20.0	20.3	20.5	20.8	21.1	21.4	21.8	22.1	22.4	22.8	23.1	23.5	23.8
Housing																			
Households	159.3	161.1	165.6	167.0	170.0	172.9	175.5	178.0	180.2	182.3	184.3	186.4	188.5	190.6	192.7	194.7	196.6	198.6	200.5
Demand for dwellings	165.2	167.0	171.7	173.2	176.3	179.3	182.0	184.5	186.9	189.0	191.1	193.3	195.5	197.7	199.8	201.9	203.9	205.9	207.9

EEFM Greater Norwich "High Migration"																			
					Table 1: Key indicators									Table 1: Key indicators					
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Demography																			
Total population	378.1	382.8	389.0	395.6	402.1	408.5	414.5	420.1	425.2	430.1	434.7	439.2	443.5	447.7	451.8	455.8	459.6	463.3	466.9
Working age population	232.5	235.4	239.7	240.8	244.9	249.1	253.3	257.2	261.0	265.0	268.9	273.6	278.3	281.0	283.1	285.2	287.1	288.5	290.1
Migration & other changes	6.1	4.6	5.4	5.8	5.6	5.4	5.0	4.6	4.2	3.9	3.7	3.6	3.5	3.4	3.3	3.3	3.2	3.1	3.1
Labour market																			
Employees in employment	177.3	173.3	170.3	176.6	179.5	183.2	187.4	191.3	194.3	196.8	198.8	200.3	201.9	203.3	204.6	206.0	207.2	208.4	209.6
Self employed	30.2	30.4	33.3	33.9	34.4	34.8	35.6	36.4	36.9	37.2	37.5	37.7	38.0	38.3	38.5	38.8	39.1	39.3	39.5
Total employment (jobs)	207.5	203.7	203.6	210.6	213.9	218.0	223.1	227.7	231.2	234.0	236.2	238.1	239.9	241.6	243.2	244.8	246.3	247.7	249.2
Total workplace employed people	187.4	184.8	185.2	191.2	194.3	198.0	202.6	206.8	210.0	212.5	214.5	216.2	217.8	219.3	220.7	222.2	223.5	224.8	226.1
Residence employment	184.9	181.7	185.5	189.6	192.0	195.1	199.0	202.7	205.5	207.7	209.4	210.8	212.2	213.4	214.7	215.9	217.0	218.1	219.2
Residence employment rate	66.1	64.1	64.3	64.7	64.5	64.7	65.3	65.9	66.3	66.5	66.7	66.8	66.9	66.9	67.2	67.3	67.4	67.4	67.4
Net commuting	2.5	3.1	-0.3	1.6	2.3	3.0	3.6	4.1	4.5	4.8	5.1	5.3	5.6	5.8	6.1	6.3	6.5	6.7	6.9
Unemployment level	4.5	7.4	7.3	7.3	8.1	8.5	8.7	8.9	8.8	8.7	8.7	8.8	9.0	9.2	9.4	9.6	9.8	9.9	10.0
Unemployment rate	1.9	3.1	3.0	3.0	3.3	3.4	3.4	3.5	3.4	3.3	3.2	3.2	3.2	3.3	3.3	3.4	3.4	3.4	3.4
Output																			
Total GVA	7737.6	7299.3	7522.9	7728.9	7954.5	8228.2	8583.7	8931.1	9254.9	9562.7	9864.1	10156.7	10440.1	10713.0	10988.9	11272.8	11561.4	11854.6	12151.9
Labour productivity	37.3	35.8	36.9	36.7	37.2	37.7	38.5	39.2	40.0	40.9	41.8	42.7	43.5	44.3	45.2	46.1	46.9	47.9	48.8
GVA per capita	20.5	19.1	19.3	19.5	19.8	20.1	20.7	21.3	21.8	22.2	22.7	23.1	23.5	23.9	24.3	24.7	25.2	25.6	26.0
Housing																			
Households	159.3	161.1	165.6	167.0	170.1	173.2	176.2	178.9	181.5	184.0	186.4	188.8	191.1	193.3	195.5	197.7	199.8	201.9	203.9
Demand for dwellings	165.2	167.0	171.7	173.2	176.4	179.6	182.7	185.5	188.2	190.8	193.3	195.7	198.1	200.5	202.8	205.0	207.2	209.3	211.4

Appendix 5 – Increased Supply

	Completions 2001-2011 (Financial Year)	Annual Average	Projected Completions 2008-2026 if 2001-2011 rate maintained
Broadland	2,870	287	5,166
Norwich	6,787	679	12,222
South Norfolk	6,300	630	11,340
GNDP	15,957	1,596	28,728

28,728 dwellings at historic annual completion rates

For more information or if you require this document in another format or language, please phone:

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