



**Greater Norwich Housing Market
Assessment
Dwellings Households and Populations**

Draft 1 May 2007

1 SUMMARY AND CONCLUSIONS

1.1 INTRODUCTION

This report draws together our projections for the number of dwellings and households and changes in populations to 2006 and 2011. Although we are now in 2007 the population and household projections for 2006 are estimates. There is no accurate count between census years.

We provide information for the sub-region, district and housing market areas. The information for housing market areas is built up from parish and ward based projections.

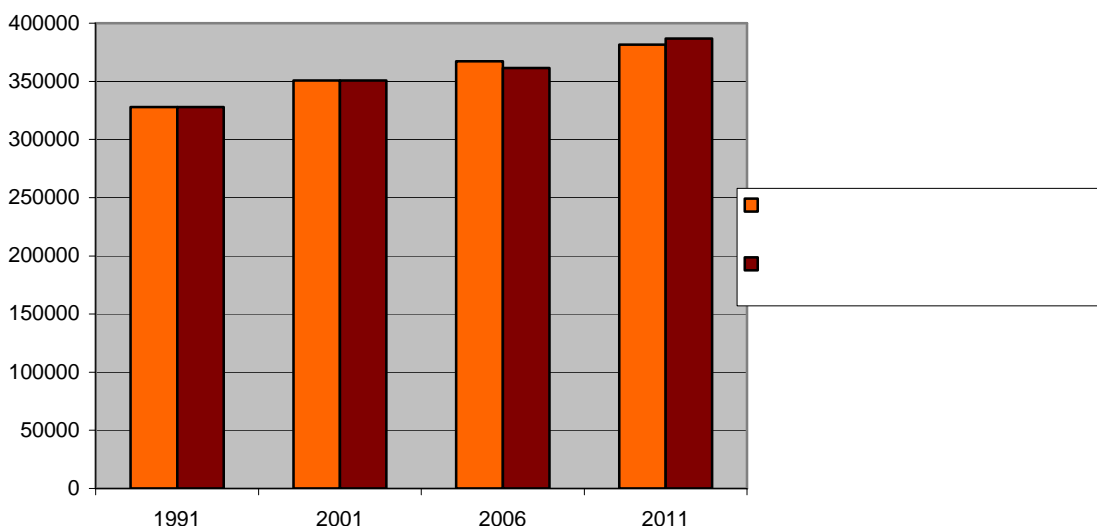
Our household and population projections are based on dwelling projections. We have good information about the number and location of new dwellings to 2011. If we want to make projections beyond 2011 we will need to make assumptions about the number and location of new homes.

We base our household and population projections at the local level on projected changes in the number of dwellings. Our assumption is that households and populations will grow most where there is most new housing.

If we try to control our local parish and ward populations to district populations from the Office for National Statistics (ONS) we encounter falling populations for some South Norfolk housing market areas. This does not seem a likely outcome.

This apparent anomaly occurs because the ONS population projections are not compatible with our dwelling based projections.

Greater Norwich – Comparison of ONS and Dwelling Based Population Projections



Source: 1991 census, 2001 census, ONS (2003 based) population projections, dwelling based population projections.

The difference is small for the sub-region but more noticeable if we look at individual districts. For example, in 2011 ONS project a population 120,300 in South Norfolk whereas our dwelling based projection is for a population of 125,000.

The final section of this report looks at how household types might change in the period between 2001 and 2011. This is important to understand how need and demand for housing will develop.

1.2 MAIN FINDINGS

Dwellings

In 1991 there were 141,585 dwellings in the sub-region and we project this will grow to 177,000 by 2011 an increase of 25% in 20 years.

In the 2006 to 2011 period we project an increase of 8% in the number of dwellings. The fastest growth will be in Norwich City (11.4%) and in the housing market areas of Norwich (9.5%) and Wymondham (7.2%). Some housing market areas will have very little growth in dwelling numbers between 2006 and 2011 – the Broads (0.9%) and Reepham (0.3%) have the lowest projected rates.

Households

Our household projections are based on projected dwellings. At the district level our projections differ to those produced by Norfolk county council. The projections for the sub-region are close.

District and Projection Source	2006	2011
Broadland - County Council	53000	57000
Broadland - Dwelling Based	51900	53400
Norwich - County Council	57000	60000
Norwich - Dwelling Based	56800	63500
South Norfolk - County Council	50000	54000
South Norfolk - Dwelling Based	48700	53800
Greater Norwich - County Council	160000	171000
Greater Norwich - Dwelling Based	157400	170700

Populations

We provide two sets of population projections. The first controls the district totals to the ONS/County council (2003) trend based projections. The controlling process when applied to our parish and ward dwelling based projections produces inconsistencies for the South Norfolk housing market areas. So we provide a second set of projections that are not controlled to ONS population projections.

The following table compares the results for the two approaches.

The ONS trend based projections show a population of 381,495 in 2011 an increase of 16% on the 1991 population of 327,848. The dwelling based projections give a 2011 population of 386,827 an increase of 18% since 1991.

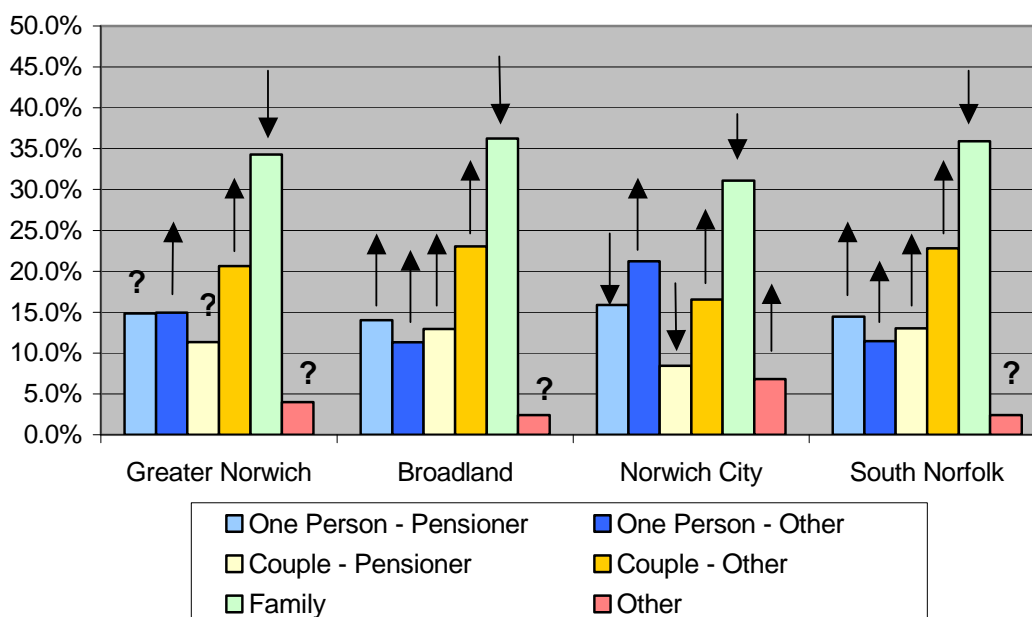
District and Projection Source	1991	2001	2006	2011
Broadland - ONS trend based	104,846	118,513	121,448	123,327
Broadland - Dwelling Based	104,846	118,513	121,752	123,839
Norwich - ONS trend based	120,895	121,550	129,508	137,861
Norwich - Dwelling Based	120,895	121,550	125,104	138,025
South Norfolk - ONS trend based	102,107	110,726	116,152	120,307
South Norfolk - Dwelling Based	102,107	110,726	114,612	124,963
Greater Norwich - ONS trend based	327,848	350,789	367,109	381,495
Greater Norwich - Dwelling Based	327,848	350,789	361,468	386,827

In the 10 years to 2011 the fastest projected rates of population growth are in the Aylsham (9.8%), Norwich (10.1%) and Wymondham (7.0%) housing market areas. In contrast the projected population growth for the Wroxham housing market area is just 0.7%.

Household Types

By looking at projected age distributions of the population we can draw some inferences about likely changes in household types.

Household Types - Greater Norwich and Districts 2001



The graph shows household types at the time of the census in 2001. The arrows show the projected direction of change for each household type. We project that pensioner households will rise in Broadland and South Norfolk districts but fall in Norwich city. It is difficult to be sure of changes in pensioner households in the sub-region. What is clear is that the proportion of family households will fall and single person and couple households will increase.

1.3 ISSUES TO RESOLVE

1. To project households and populations for housing market areas beyond 2011 we will need to make assumptions about the number and location of new dwellings.

There is currently little data available about likely house building numbers and locations post March 2011. The GNPD are developing a range of scenarios for future housing growth but these are unlikely to be ready until late this summer.

Do we want to look at one or more scenarios as part of this housing market assessment?

Recommendation

It is premature to look at possible scenarios until we have the GNPD options. Projections for households, dwellings and populations beyond 2011 should form part of updates to the HMA.

2. We have an identified difference in population projections between ONS and our dwelling based projections. For the sub-region the difference is an extra 5,000 people in 2011.

The difference is most noticeable in South Norfolk where the ONS trend based projection take little account of the projected increase in house building. Either set of projections could be correct – but not both.

Are we comfortable with this difference? If no how do we reconcile the inconsistencies that occur in South Norfolk housing markets? If yes where do these extra people come from?

Recommendation

We use the dwelling based projection. We monitor house-building completions as part of updates to the HMA. If completions are less than currently projected we will adjust our population and household projections down.

1.4 THE DETAILED CONTENTS OF THIS REPORT

The report looks in detail at...

- Dwelling projections.
- Household projections by location and number.
- Population projections.
- Direction of change for the main household types.

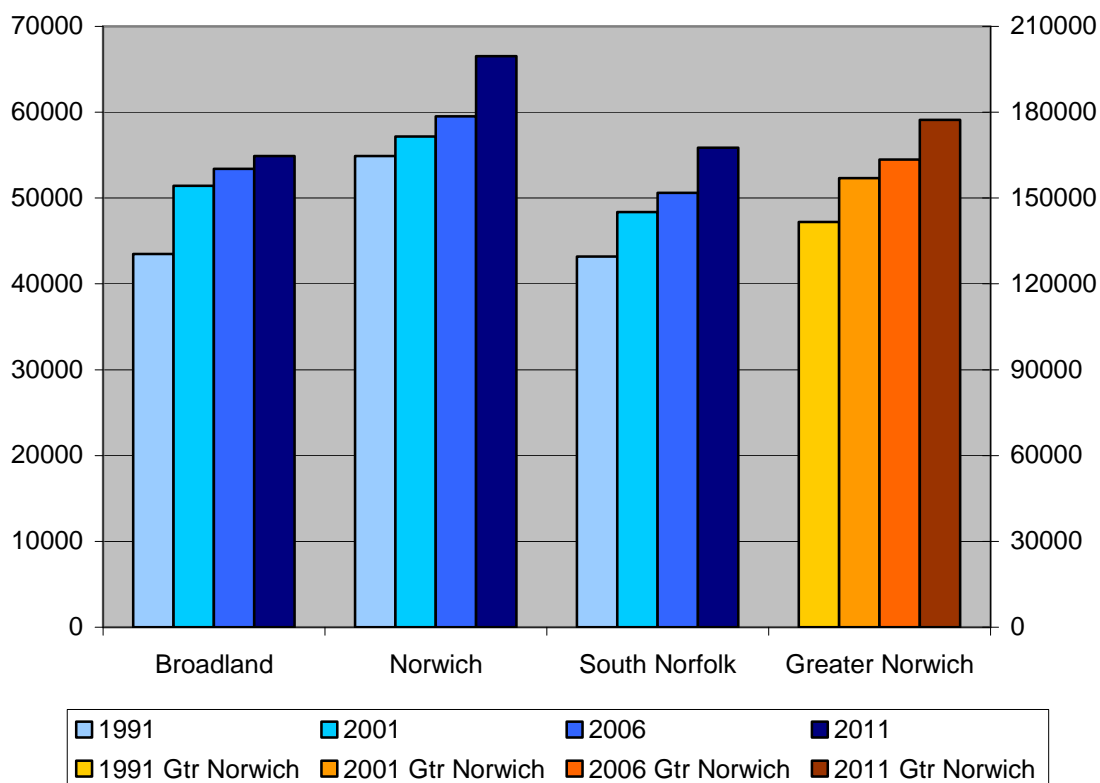
The methodology at the end of the report gives further information on the two alternative population projections.

2 DWELLINGS

Across the sub-region the number of dwellings has grown from 141,600 in 1991 to a projected 177,300 in 2011. This represents an increase of 25.2% over 20 years.

Dwellings by District and Sub-region (2011 Projected)

(Greater Norwich sub-region on the right scale.)



Percentage Increase in Dwelling Numbers by District and Time Period

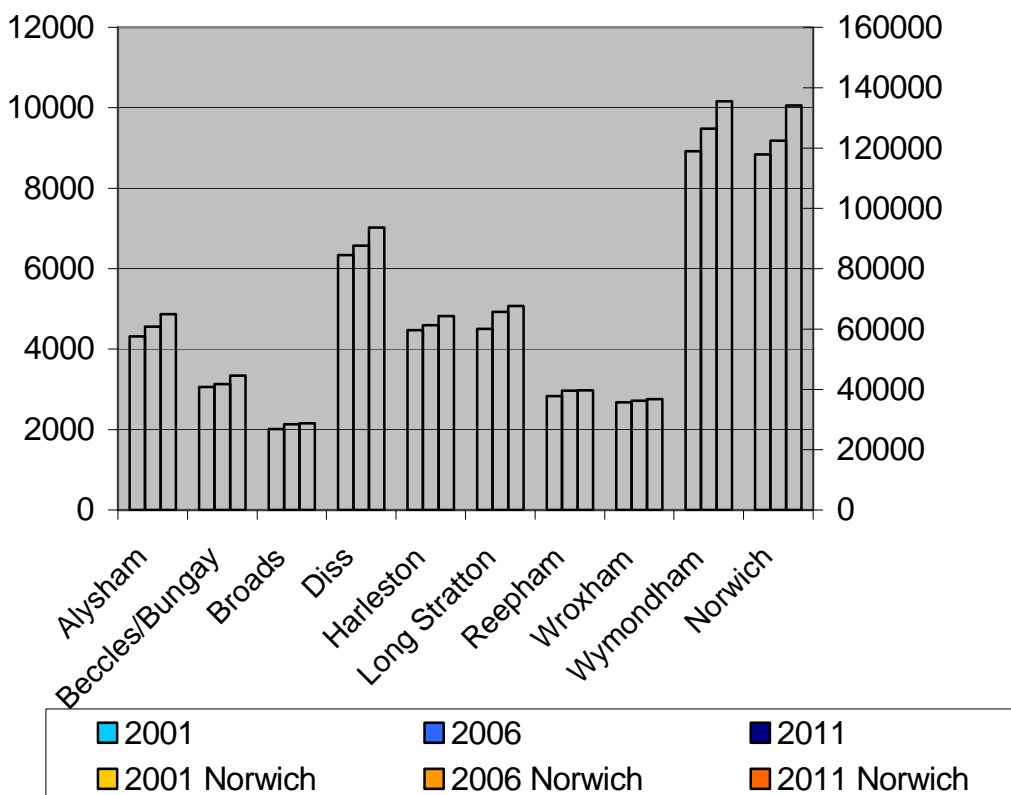
	Growth 1991-2001	Growth 2001-2006	Growth 2006-2011	Growth 2001-2011
Broadland	18.3%	3.8%	2.8%	6.7%
Norwich City	4.1%	4.1%	11.8%	16.4%
South Norfolk	12.0%	4.6%	10.4%	15.4%
Greater Norwich	10.9%	4.1%	8.4%	12.9%

Overall in the period 2001 to 2011 we project greatest growth in Norwich City (16.4%) and least in Broadland district (6.7%). The growth is uneven and varies between district and time period.

The growth in the number of dwellings varies by housing market area. In the period 2001 to 2011 the greatest projected growth is in the Norwich (13.8%) and the Wymondham (13.9%) market areas.

Dwellings by Housing Market Area (2011 Projected)

(The Norwich housing market area is on the right scale.)



Source: 1991 census, 2001 census, 2006 council tax register, 2011 housing trajectories for three districts.

Percentage Increase in Dwelling Numbers by Housing Market Area and Time Period

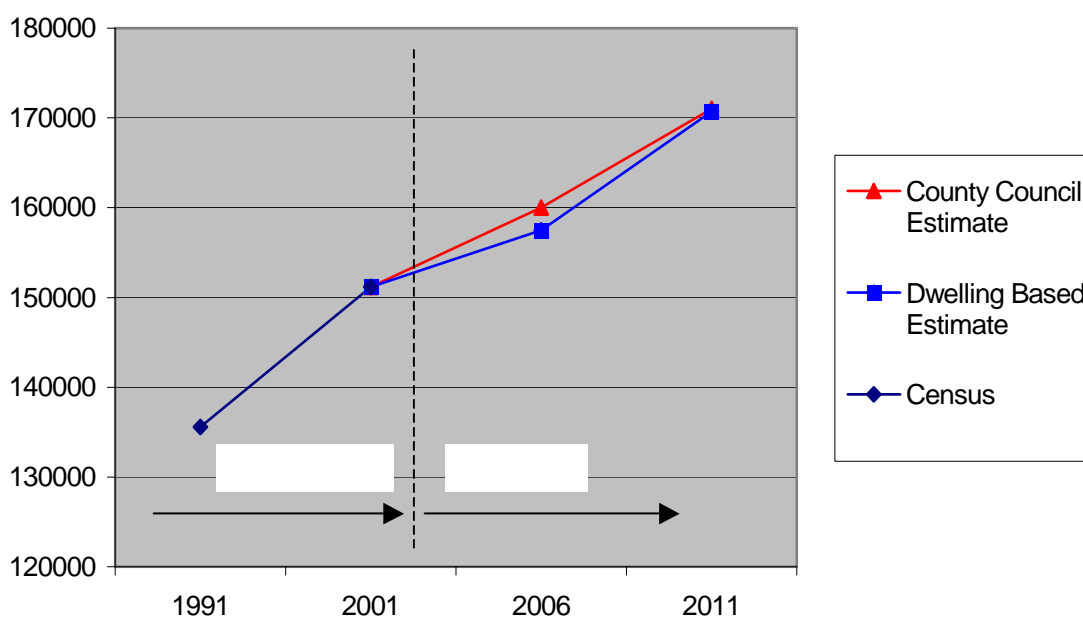
	Growth 2001-2006	Growth 2006-2011	Growth 2001-2011
Alysham	5.7%	6.7%	12.8%
Beccles/Bungay	2.2%	6.9%	9.2%
Broads	6.4%	0.9%	7.3%
Diss	3.6%	6.8%	10.7%
Harleston	2.6%	5.0%	7.7%
Long Stratton	9.3%	3.0%	12.6%
Norwich	3.9%	9.5%	13.8%
Reepham	4.8%	0.3%	5.1%
Wroxham	1.6%	1.5%	3.1%
Wymondham	6.2%	7.2%	13.9%

3 HOUSEHOLDS

Between censuses there is no certain method of measuring the number of households. Norfolk County Council projects household numbers using information from the Office for National Statistics. These projections use recent demographic trends.

Our household projections are based upon dwelling numbers in 2006 and projected dwelling numbers in 2011. Our projections assume the proportion of empty dwellings remains constant.

Dwelling Projections for the Greater Norwich Sub-region



Source: 1991 Census, 2001 Census, Norfolk County Council 2003 Based Household Projections (2007)

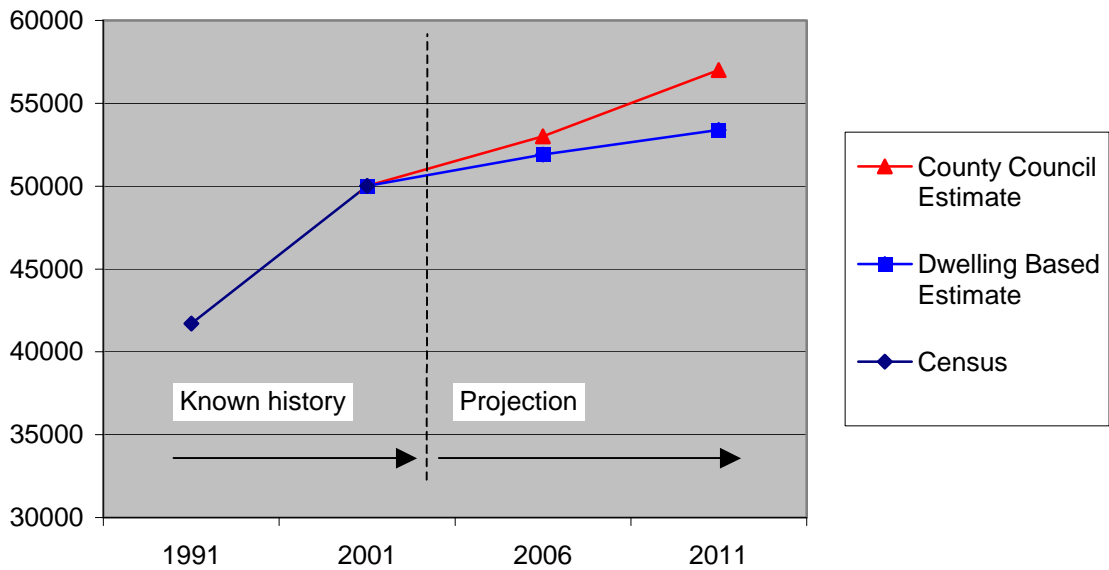
Our dwelling based estimate gives a slightly lower figure for 2006 than the Norfolk County Council trend based projections. Both sets of projections are very close for 2011.

The reason for the 2006 divergence becomes clearer when we look at the projections for the individual districts. The differences are clearly linked to the number of new dwellings completed.

The trend-based projections assume household growth will follow trends in the period to 2003 – the base year for the projections. We assume the rate of new dwelling completion prior to 2003 is an important factor in the trends.

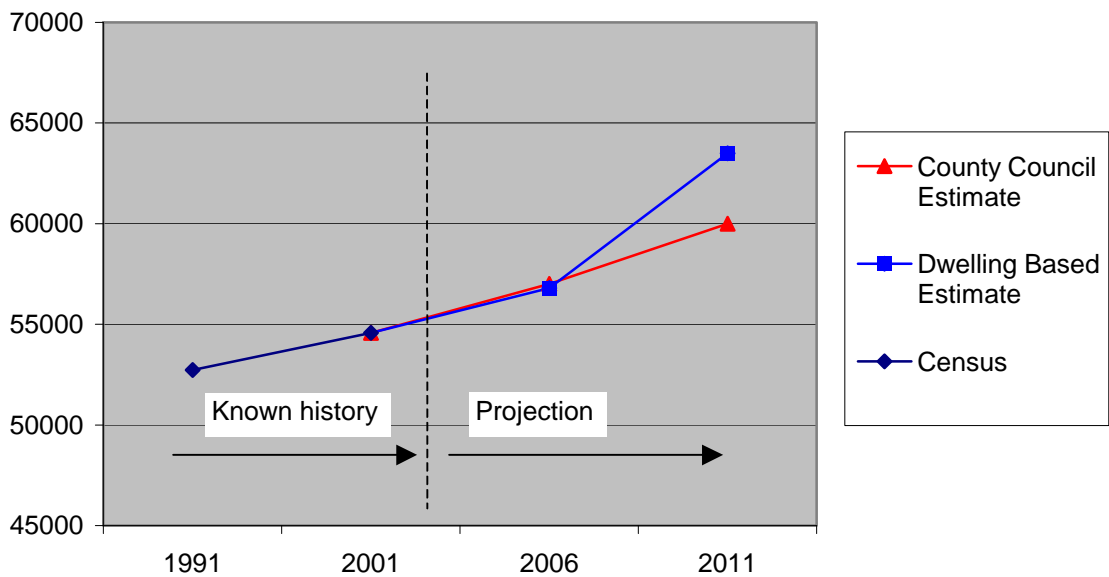
For Broadland district the trend based figures assume the high level of housing completions in the period to 2001 continue into 2001 to 2005 and 2006 to 2011. Our dwelling based projections allow for lower anticipated rates of development.

Dwelling Projections for Broadland District



Source: 1991 Census, 2001 Census, Norfolk County Council 2003 Based Household Projections (2007)

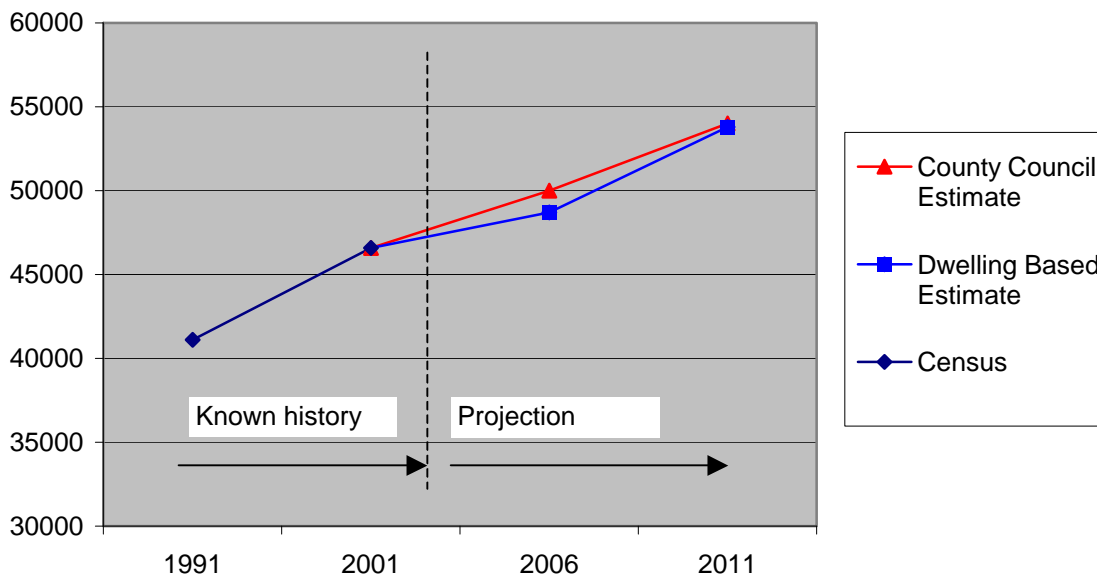
Dwelling Projections for Norwich City



Source: 1991 Census, 2001 Census, Norfolk County Council 2003 Based Household Projections (2007)

For Norwich city, unlike Broadland district, projected completions increase in the post 2001 period. Our dwelling based household projections show this increase.

Dwelling Projections for South Norfolk



Source: 1991 Census, 2001 Census, Norfolk County Council 2003 Based Household Projections (2007)

For South Norfolk house building completions were slow in the period 2001 to 2006 but are projected to increase in the period 2006 to 2011. Our dwelling based household estimates reflect this with a 2006 estimate below the County Council trend based estimate but with similar estimates for 2011.

4 POPULATIONS

The census provides the most accurate population estimate. In the post 2001 census period the Office for National Statistics and Norfolk County Council produce trend based population estimates by district and age.

The ONS does not produce population estimates at the sub-district level. Norfolk County Council produces occasional estimates by parish/ward but has no recent data at this level. We must prepare our own estimates for housing market areas.

Our approach is to increase local populations in line with the increase in dwellings. This means a location with a large increase in dwellings will also see a large increase in populations. Outside of Norwich we project populations at the parish level. We combine parishes to form housing market areas.

Should we control our estimates to the ONS/County council district projections? If we do we encounter some anomalies with housing market areas in South Norfolk. We explore two alternative population projections...

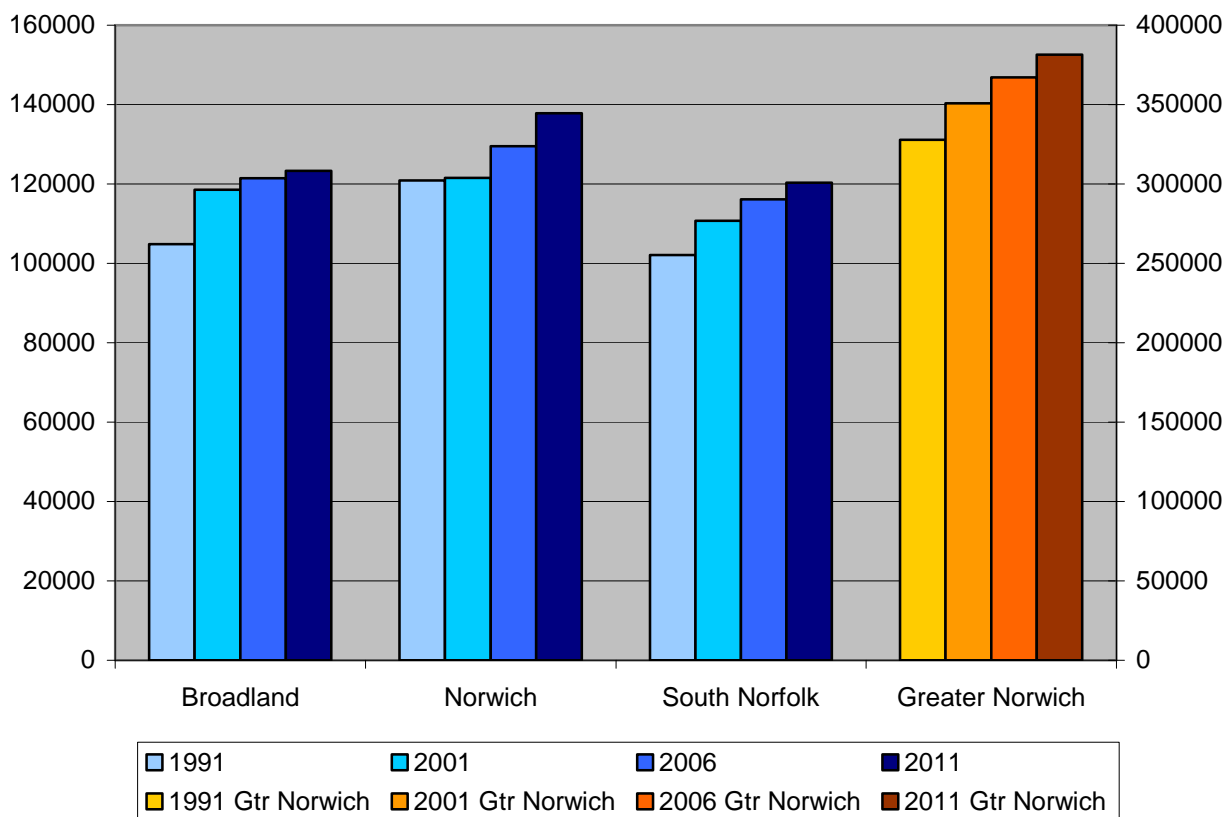
1. Projections controlled to the ONS/County council district projections – ONS projections.
2. Uncontrolled dwelling based projections – Dwelling based population projections,.

4.1 POPULATION PROJECTIONS CONTROLLED TO ONS/COUNTY COUNCIL DISTRICT PROJECTIONS

Our first set of population projections are controlled to the ONS/County council district population projections. See Methodology – section 4 – for more details.

Populations by District and Sub-region (2006 and 2011 Projected)

(Greater Norwich sub-region on the right scale.)



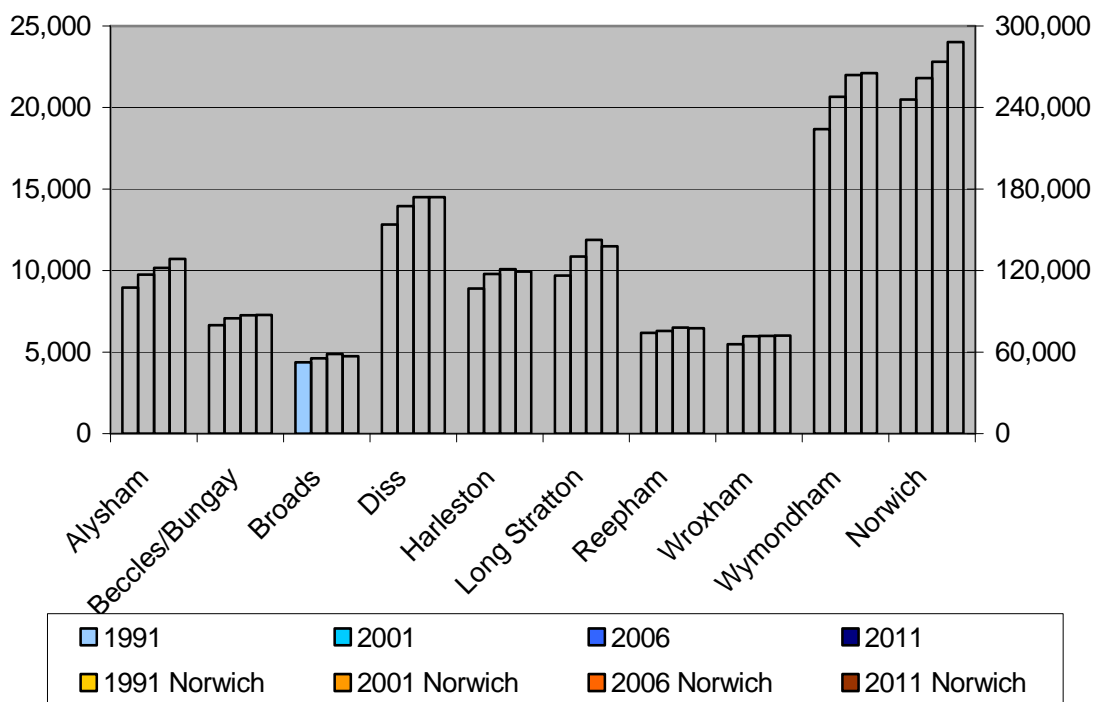
Source: 1991 census, 2001 census, ONS (2003 based) population projections.

Percentage Increase in Populations by District and Time Period

	Growth 1991-2001	Growth 2001-2006	Growth 2006-2011	Growth 2001-2011
Broadland	13.0%	2.5%	1.5%	4.1%
Norwich City	0.5%	6.5%	6.4%	13.4%
South Norfolk	8.4%	4.9%	3.6%	8.6%
Greater Norwich	7.0%	4.7%	3.9%	8.8%

Population by Housing Market Area (2006 and 2011 Projected)

(The Norwich housing market area is on the right scale.)



Source: 1991 census, 2001 census, 2006 and 2011 projections linked to growth in dwellings and controlled to ONS/County council district population projections.

Percentage Increase in Populations by Housing Market Area and Time Period

	Growth 1991-2001	Growth 2001-2006	Growth 2006-2011	Growth 2001-2011
Alysham	9.0%	4.2%	5.3%	9.8%
Beccles/Bungay	6.4%	2.4%	0.2%	2.7%
Broads	5.5%	5.5%	-2.6%	2.7%
Diss	8.8%	4.0%	0.0%	4.0%
Harleston	10.0%	3.0%	-1.4%	1.6%
Long Stratton	11.9%	9.5%	-3.2%	6.0%
Norwich	6.4%	4.6%	5.3%	10.1%
Reepham	2.1%	3.4%	-0.8%	2.5%
Wroxham	8.7%	0.5%	0.2%	0.7%
Wymondham	10.7%	6.4%	0.6%	7.0%

Controlling the populations to the ONS/County council district population projections results in population falls for some of the South Norfolk housing market areas between 2006 and 2011. The reason is that our projection for an increase of 5,200 dwellings is not compatible with the forecast increase in population of only 4,200.

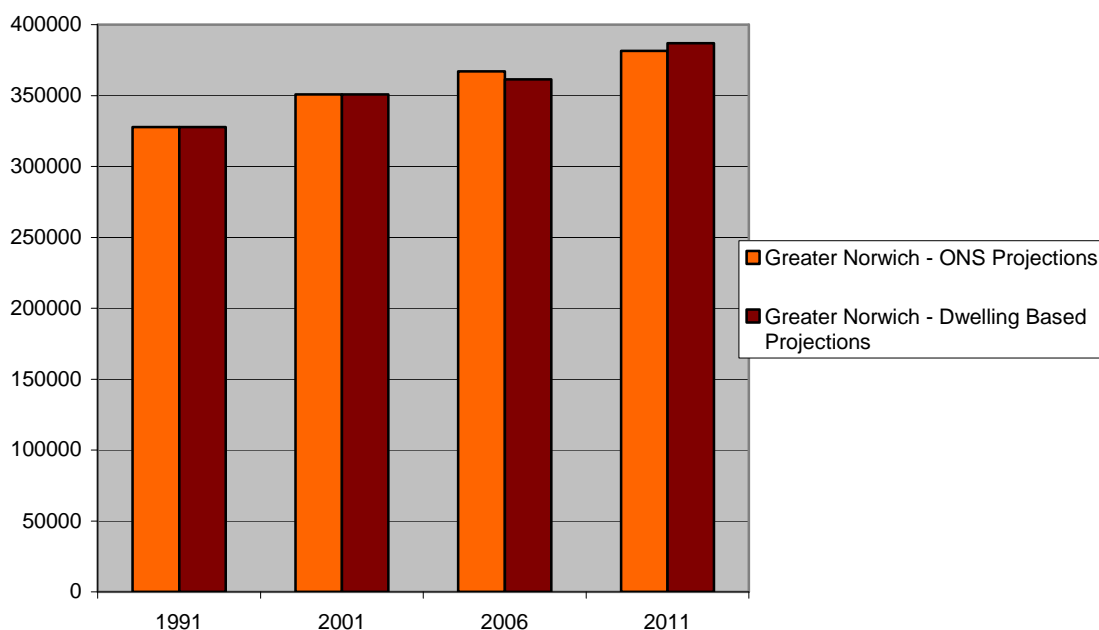
The only way the district population projection and dwelling projections become compatible is if average household sizes fall significantly. This is in effect the assumption we make when we control the housing market area populations to the ONS/County council district projections. The result of this assumption is for projected populations to fall in South Norfolk housing market areas with low rates of dwelling growth.

4.2 ALTERNATIVE POPULATION PROJECTIONS – NOT CONTROLLED TO ONS/COUNTY COUNCIL DISTRICT PROJECTIONS

These projections do not attempt to control our dwelling based population forecasts to the ONS/County council district population projections. However, we do assume a gradual decline in average household size. Refer to the Methodology – section 4 – for more details.

The following graphs compare the ONS and dwelling based projections for Greater Norwich and the three districts.

Greater Norwich – Comparison of ONS and Dwelling Based Population Projections



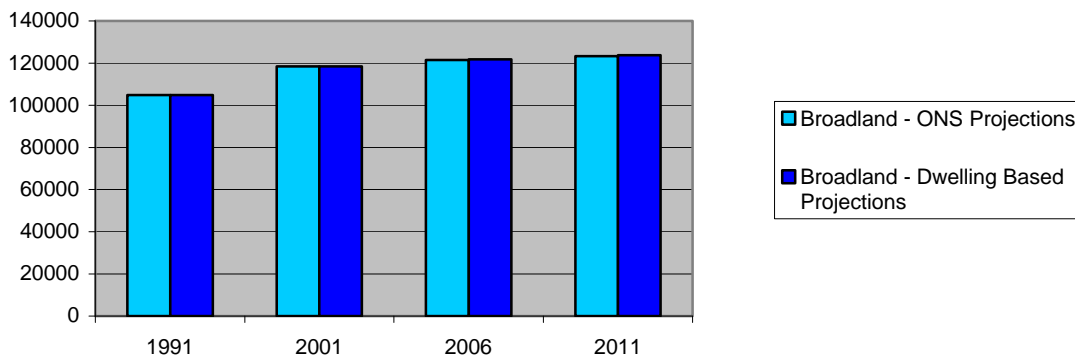
Source: 1991 census, 2001 census, ONS (2003 based) population projections, dwelling based population projections.

For Greater Norwich the dwelling based projections result in a slightly lower population projection in 2006 – 361,500 instead of 367,100. For 2011 the dwelling based projections give a slightly higher projection – 386,800 instead of 381,500. This reflects the projected acceleration in the number of new dwellings in 2006 to 2011.

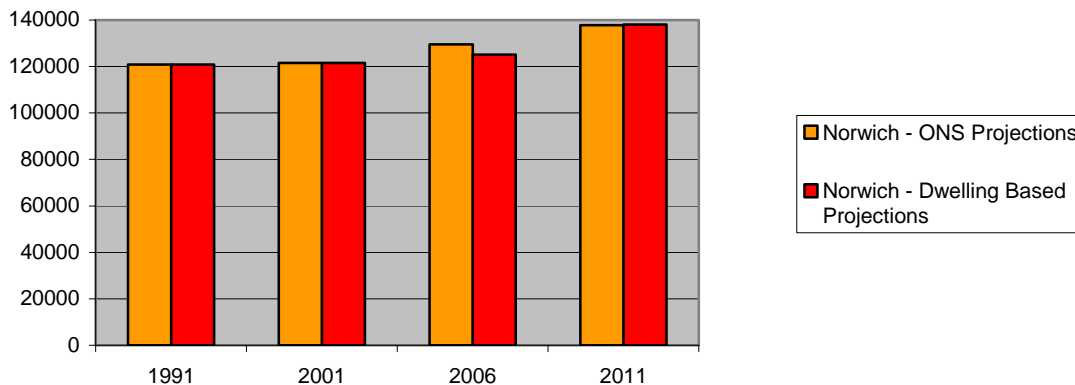
At the district level the most notable change is an increase in the projected population in South Norfolk in 2011 – up from 120,300 to 125,000.

District – Comparisons of ONS and Dwelling Based Population Projections

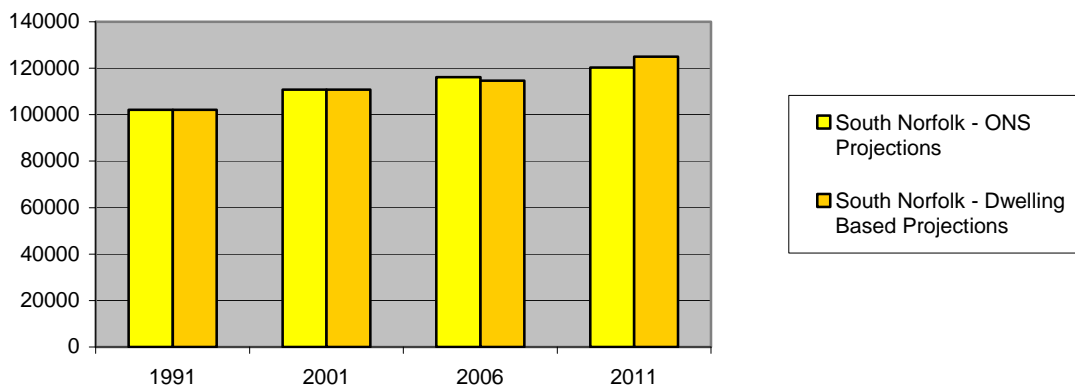
Broadland



Norwich City



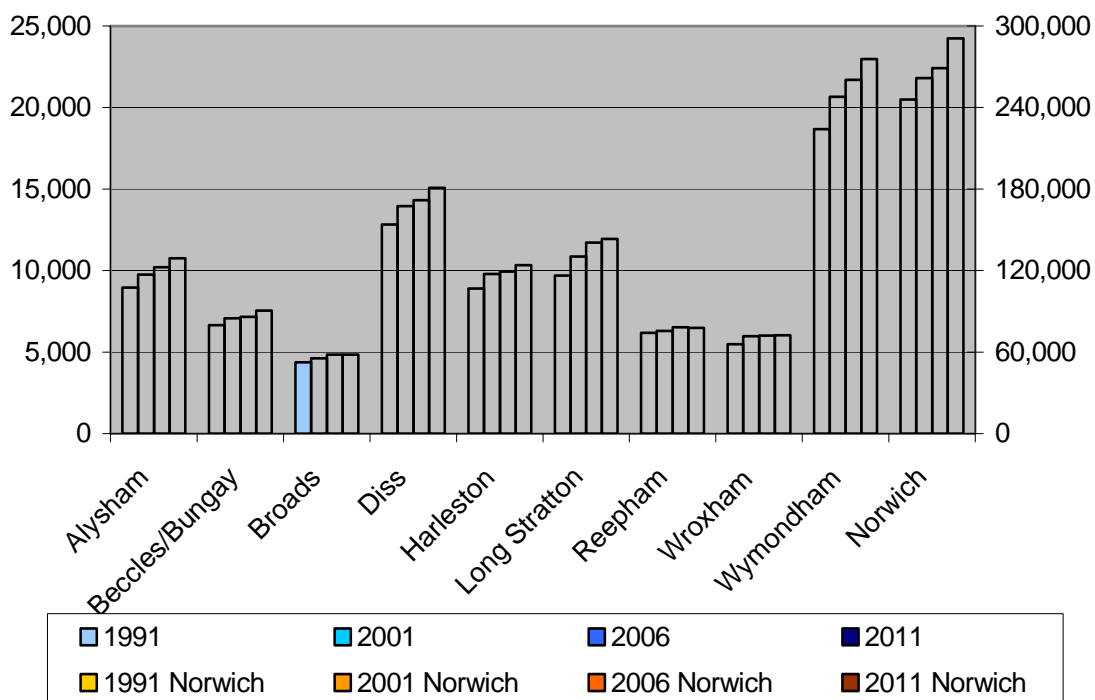
South Norfolk



Source: 1991 census, 2001 census, ONS (2003 based) population projections, dwelling based population projections.

Population by Housing Market Area (2006 and 2011 Projected)

(The Norwich housing market area is on the right scale.)



Source: 1991 census, 2001 census, 2006 and 2011 projections linked to growth in dwellings.

Percentage Increase in Populations by Housing Market Area and Time Period

	Growth 2001-2006	Growth 2001-2006	Growth 2006-2011	Growth 2001-2011
Alysham	9.0%	4.5%	5.5%	10.2%
Beccles/Bungay	6.4%	1.1%	5.5%	6.7%
Broads	5.5%	5.0%	-0.1%	4.9%
Diss	8.8%	2.6%	5.3%	8.0%
Harleston	10.0%	1.6%	3.8%	5.5%
Long Stratton	11.9%	8.1%	1.9%	10.1%
Norwich	6.4%	2.8%	8.1%	11.1%
Reepham	2.1%	3.6%	-0.7%	2.9%
Wroxham	8.7%	0.7%	0.4%	1.1%
Wymondham	10.7%	5.0%	5.8%	11.1%

The dwelling based population projection shows growth of populations in all areas in 2006 to 2011 except for the Broads and Reepham. In these areas we project few new dwellings and the decline in population is due to the decline in average household size.

Comparison of the ONS Controlled Population Projections with the Dwelling Based Projections for 2006 and 2011

	ONS Controlled Projections 2006	ONS Controlled Projections 2011	Dwelling Based Projections 2006	Dwelling Based Projections 2011
Aylsham	10,174	10,714	10,200	10,758
Beccles/Bungay	7,258	7,276	7,162	7,557
Broads	4,882	4,753	4,857	4,852
Diss	14,510	14,509	14,318	15,071
Harleston	10,087	9,942	9,951	10,331
Long Stratton	11,890	11,508	11,732	11,954
Norwich	273,814	288,205	269,011	290,818
Reepham	6,512	6,457	6,528	6,484
Wroxham	5,993	6,007	6,008	6,032
Wymondham	21,989	22,124	21,701	22,970

The dwelling based projections do not show declining populations in any of the South Norfolk housing market areas.

Population Growth for Large Settlements

Large Settlements	Housing Market Area	Population 1991	Population 2001	Population 2006	Population 2011
Aylsham	Aylsham	4,950	5,504	5,849	6,320
Blofield	Norwich	3,176	3,221	3,284	3,251
Brundall	Norwich	3,937	3,978	4,084	4,044
Costessey	Norwich	9,710	9,821	9,816	13,245
Diss	Diss	6,209	6,750	6,898	7,562
Drayton	Norwich	2,927	5,150	5,139	5,218
Harleston	Harleston	3,684	4,058	4,076	4,402
Hellesdon	Norwich	11,747	11,177	11,125	11,245
Hethersett	Norwich	4,635	5,441	5,477	5,722
Horsford	Norwich	2,188	3,965	4,154	4,200
Long Stratton	Long Stratton	2,896	3,701	4,213	4,373
Mulbarton	Norwich	2,912	2,827	3,168	3,665
Old Catton	Norwich	5,569	5,954	6,080	6,080
Plumbstead	Norwich	2,563	2,618	2,763	3,277
Poringland	Norwich	3,081	3,261	3,479	4,426
Spixworth	Norwich	4,400	3,768	3,696	3,658
Sprowston	Norwich	13,785	14,027	14,772	15,983
Taverham	Norwich	6,711	10,233	10,255	10,154
Thorpe St Andrew	Norwich	10,131	13,762	14,254	14,113
Wymondham	Wymondham	10,716	12,548	13,288	14,486

Key

10,233 Population growth > 10% over 5 years (20% over 10 years to 2001)

3,479 Population growth > 5% over 5 years (10% over 10 years to 2001)

The table shows population changes for large settlements but excluding the city of Norwich. A large settlement has a population in excess of 3,000. We include settlements such as Plumstead which we project will have a population in excess of 3,000 by 2011.

The table highlights settlements with large (projected) population growth.

5 HOUSEHOLD TYPES

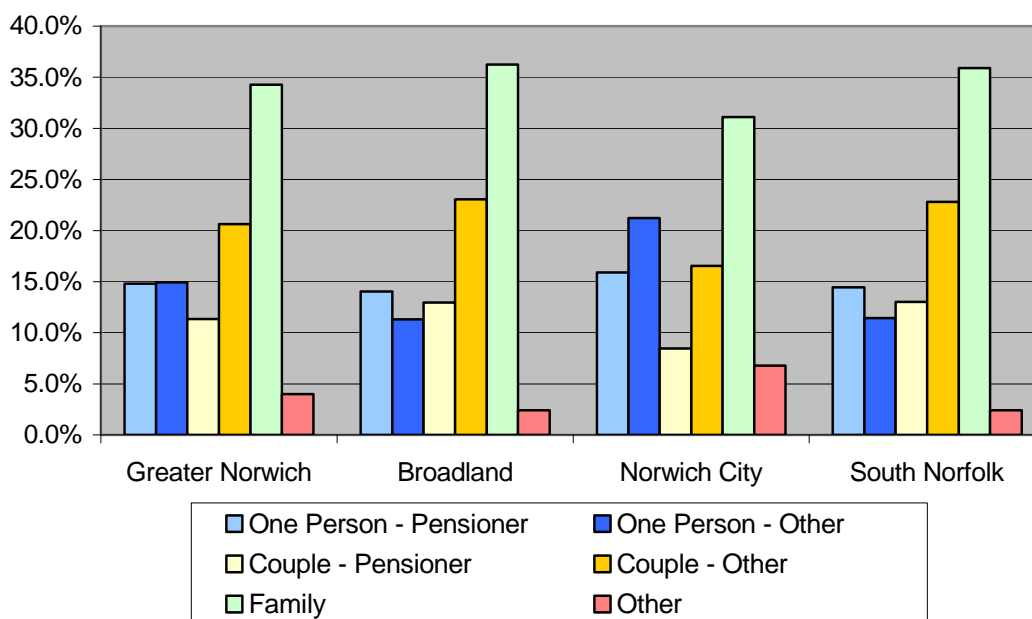
Understanding projected changes in household numbers is important. But we also need to understand how the household types that make up the total numbers may change.

We start by looking at household types in 2001. We use this as a base to look at how changing age profiles will affect the main household types...

- Single people – pensioners and others.
- Couples – pensioners and others.
- Families.

5.1 HOUSEHOLD TYPES IN 2001

Household Types - Greater Norwich and Districts 2001



Source: Office for National Statistics – 2001 Census

Across Greater Norwich in 2001 about 30% of households were single person households shared almost equally between single pensioners and single others. A little over 30% of households contained couples with no children. Of these a

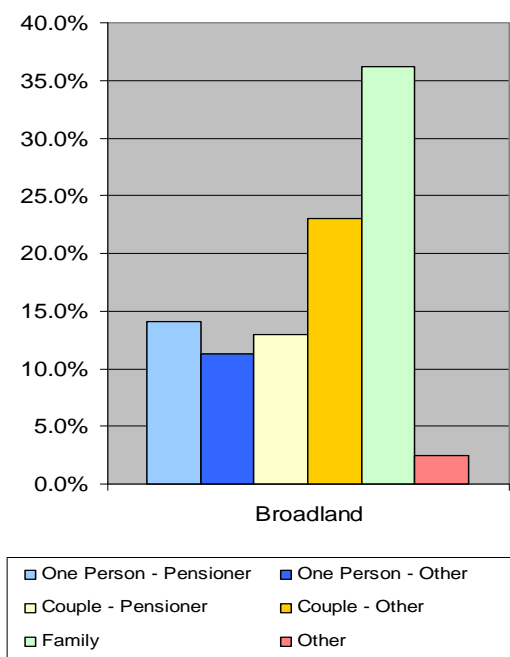
little over 10% were pensioner couples¹. The largest group at just under 35% were families. Families include single parent families and families with non-dependant children as well as families with dependent children. Finally the other category contains just under 5% of households. Other households contain groups of unrelated people. The most common grouping is students.

Broadland and South Norfolk Districts had similar household types in 2001. In both districts single households are less common than in the sub-region. This is especially true of single other (non pensioner) households. Couples and families were more common in Broadland and South Norfolk districts than in the sub-region.

Norwich City differed to the other two districts. Norwich had significantly more single person households, especially single pensioner households. The number of couples and families were less than in the rest of the sub-region. Norwich had a large number of other households. The higher level in Norwich was almost entirely due to the high number of student households.

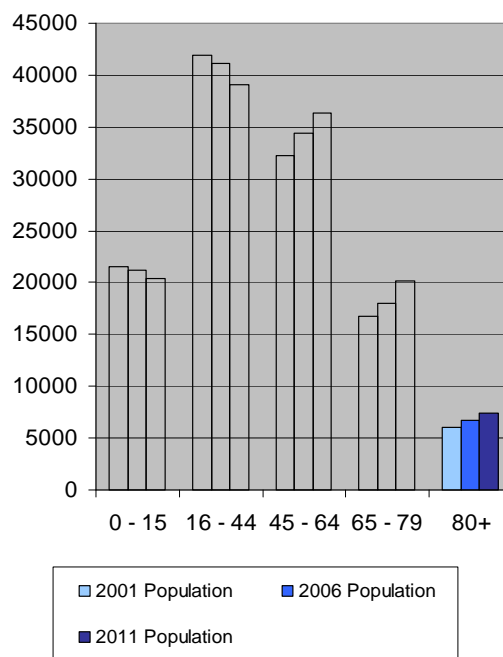
5.2 CHANGES IN HOUSEHOLD TYPES FOR BROADLAND DISTRICT AND HOUSING MARKET AREAS WITHIN THE DISTRICT

Household Type (2001)



Source: ONS – 2001 Census

Population Projections by Age (2001 to 2011)



Source: HMA population projections.

¹ Strictly speaking this category is pensioner families. The vast majority are couples. Some will be other forms of pensioner family such as brothers and sisters.

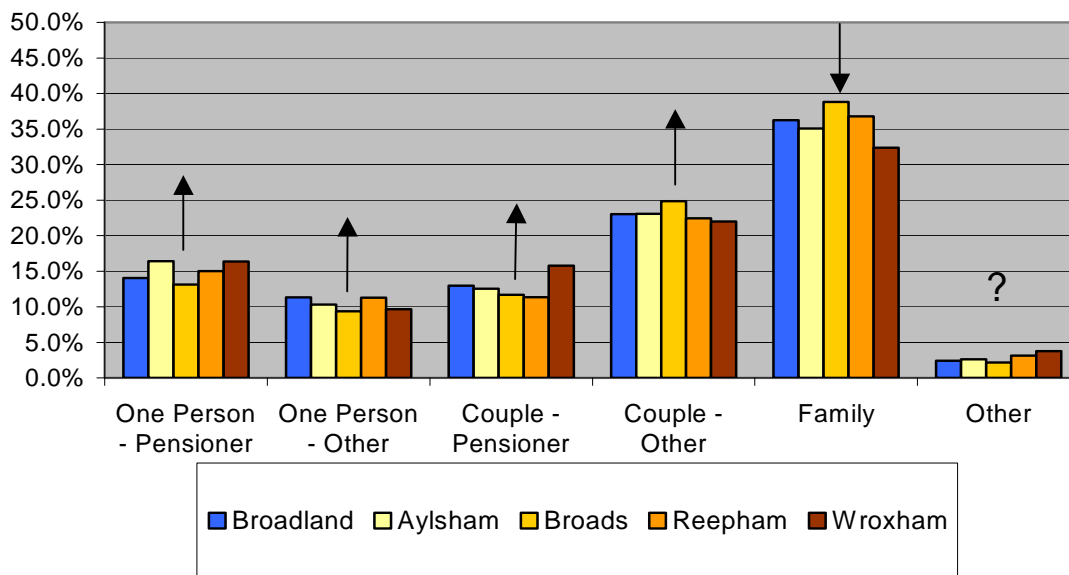
The left graph shows the breakdown of households in 2001. The right graph shows the projected changes in populations by age. What inferences can we draw about changes in household types?

1. We project the numbers of people over 65 will increase. This means we can expect an increase in the number of single and couple pensioner households.
2. We project the number of 0 to 15 year olds to fall. This means the number of families with dependent children is likely to fall.
3. Nearly all non-dependent children will be in their late teens or early twenties. We project the numbers in the age group 16 to 44 to fall. It is therefore likely that the number of families with non-dependent children will fall. But we cannot be sure of this. It is possible that lack of affordability in the housing market may force increasing proportions of young adults to stay with parents. If this were to happen we would expect a corresponding fall in single person and couple households in this age group.
4. On balance it is likely that the number of families will fall. Families with dependent children are likely to fall and families with non-dependant children may fall.
5. Apart from the over 65s the other group projected to increase to 2011 is the 45 to 64 year age group. People in this age group could be in family, couple or single people households. However, given the fall in the number of dependent children and the possible fall in non-dependant children it is most likely that the increase population will result in more couples and single people households.
6. The table shows the likely direction of change by household type based on the projected changes in the age profile of the population.

Broadland Household Types – Projected Direction of Change 2001 to 2011

Household Type	2001 Number	2001 Percentage	2006 Percentage	2011 Percentage
One Person - Pensioner	7,018	14.0%	Up	Up
One Person - Other	5,663	11.3%	Up	Up
Couple - Pensioner	6,474	12.9%	Up	Up
Couple - Other	11,526	23.0%	Up	Up
Family	18,121	36.2%	Down	Down
Other	1,205	2.4%	?	?
Total	50,007	100.0%	100.0%	100.0%

Household Types – Broadland District Housing Markets



Source: Office for National Statistics – 2001 Census

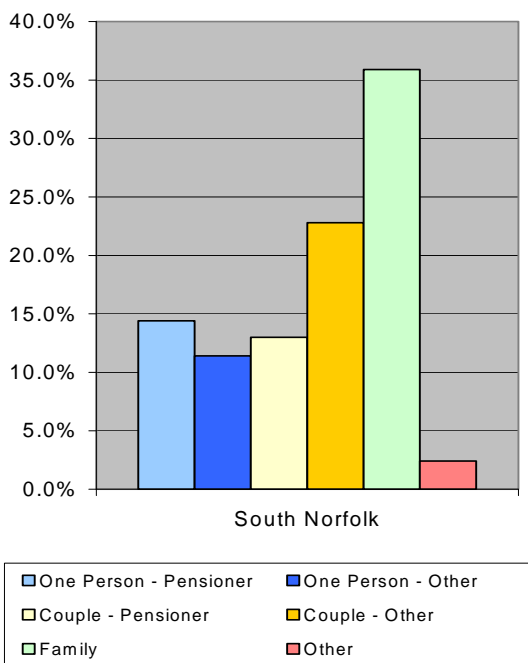
The graph shows percentage household types for the housing markets in Broadland district. We include the Broads market area although this market is shared with South Norfolk. The arrows show the projected direction of change in household types within Broadland district.

Only Aylsham of the housing market areas has any significant projected housing development in the period to 2001 to 2011. This may have a marginal impact on the mix of household types.

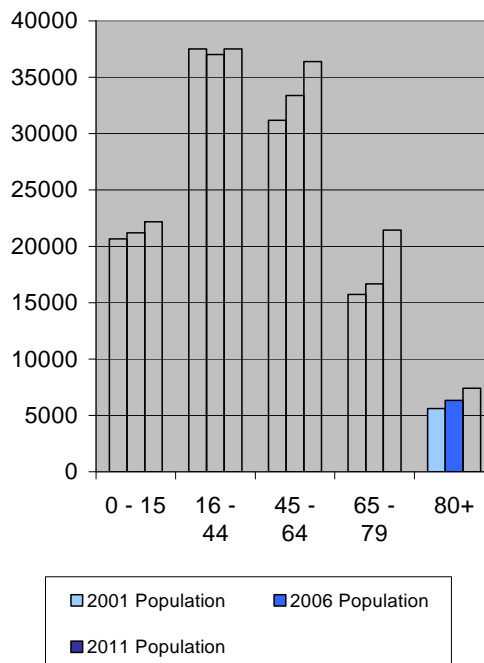
Otherwise if we assume the market areas follow the projected trends for the districts we would expect fewer family households and more couple and pensioner households. The Wroxham housing market area in 2001 already had a relatively high proportion of pensioner households.

5.3 CHANGES IN HOUSEHOLD TYPES FOR SOUTH NORFOLK DISTRICT AND HOUSING MARKET AREAS WITHIN THE DISTRICT

Household Type (2001)



Population Projections by Age (2001 to 2011)



Source: ONS – 2001 Census

Source: HMA population projections.

The left graph shows the breakdown of households in 2001. The right graph shows the projected changes in populations by age. What inferences can we draw about changes in household types?

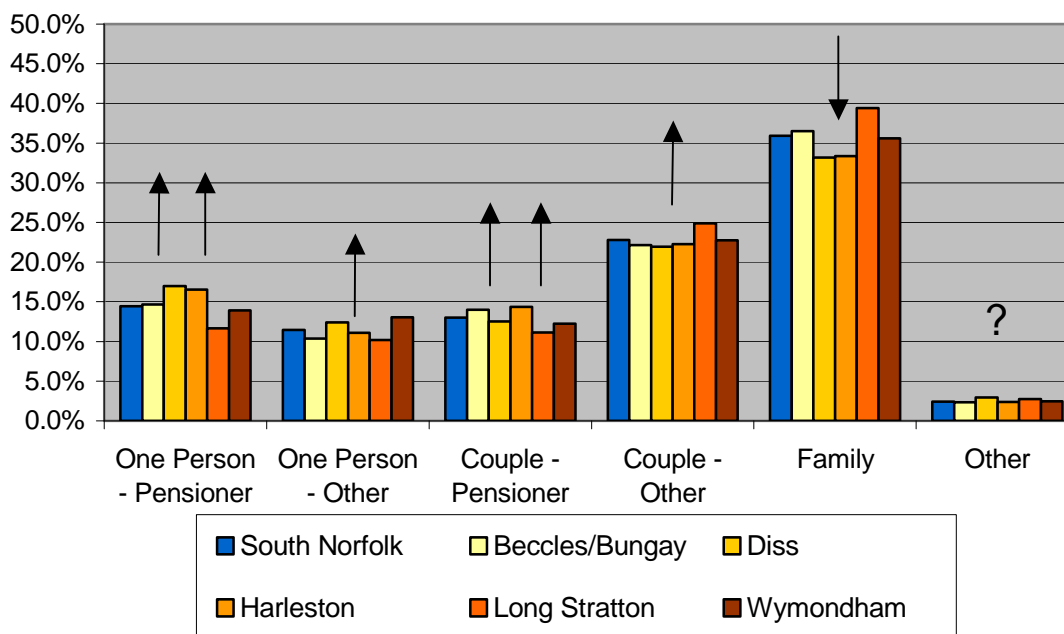
1. We project the numbers of people over 65 will increase. This means we can expect an increase in the number of single and couple pensioner households.
2. We project the number of 0 to 15 year olds to increase slightly. This means the number of families with dependent children is also likely increase.
3. Nearly all non-dependent children will be in their late teens or early twenties. We project the numbers in the age group 16 to 44 to remain fairly static. It is therefore likely that the number of families with non-dependent children will remain unchanged. But we cannot be sure of this. It is possible that lack of affordability in the housing market may force increasing proportions of young adults to stay with parents. If this were to happen we would expect a corresponding fall in single person and couple households in this age group.
4. It is likely that the number of families will increase slightly but fall in percentage terms. Families with dependent children are likely to increase and families with non-dependant are likely to remain unchanged.

5. Apart from the over 65s the other group projected to increase significantly to 2011 is the 45 to 64 year age group. People in this age group could be in family, couple or single people households. However, given the small rise in the number of dependent children it is most likely that the increased population will result in more couples and single people households.
6. The table shows the likely direction of change by household type based on the projected changes in the age profile of the population.

South Norfolk Household Types – Projected Direction of Change 2001 to 2011

Household Type	2001 Number	2001 Percentage	2006 Percentage	2011 Percentage
One Person - Pensioner	6,711	14.4%	Up a lot	Up a lot
One Person - Other	5,313	11.4%	Up	Up
Couple - Pensioner	6,059	13.0%	Up a lot	Up a lot
Couple - Other	10,626	22.8%	Up	Up
Family	16,779	36.0%	Down	Down
Other	1,119	2.4%	?	?
Total	46,607	100.0%	100.0%	100.0%

Household Types – South Norfolk Housing Markets



Source: Office for National Statistics – 2001 Census

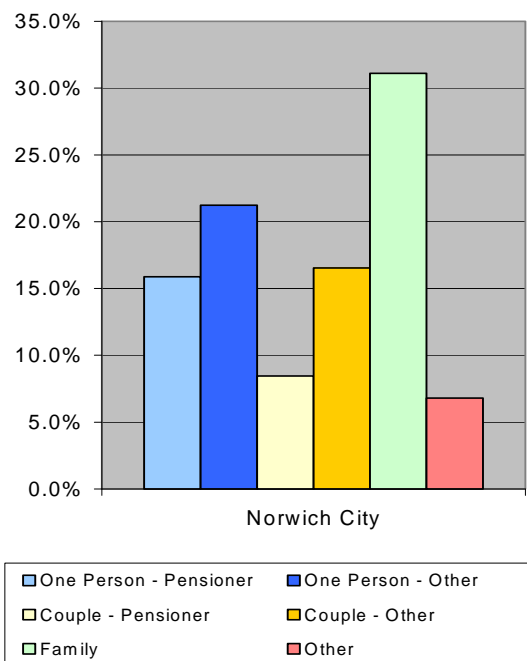
The arrows show the projected direction of change in household types within South Norfolk district.

Note that although we expect the absolute numbers of families to increase the proportion is likely to fall. This is a result of the large projected increases for pensioner households – indicated with a double arrow.

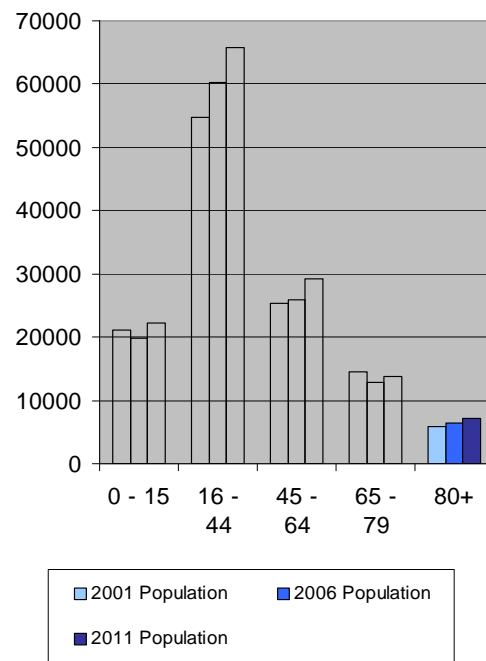
We project large numbers of new dwellings in the housing market area of Wymondham and to a lesser extent the markets of Diss, Harleston and Long Stratton. This gives the potential for variation in changes by household type. For example, if large numbers of in migrant families choose Wymondham because of the quality of the local schools.

5.4 CHANGES IN HOUSEHOLD TYPES FOR NORWICH CITY

Household Type (2001)



Population Projections by Age (2001 to 2011)



Source: ONS – 2001 Census

Source: HMA population projections.

The left graph shows the breakdown of households in 2001. The right graph shows the projected changes in populations by age. What inferences can we draw about changes in household types in Norwich? The patterns are very different to Broadland and South Norfolk.

1. We project the age group 65 – 79 to remain level. We project the 80+ age group to increase slowly. This means that pensioner households as a proportion of the total are likely to fall.
2. We also project the number of 0 to 15 year olds to remain fairly static. This means the number of families with dependent children is also likely to remain fairly static and to fall as a proportion of the total

3. The group with the biggest population increase is the 16 to 44 age group. The options for this group are...

- To remain as non-dependant children with their family.
- To form households of their own – these households could be single person households, couple households or with other adults in ‘non family’ households.

Some may form families with children but because we project no increase in the number of dependent children it is unlikely that there will be a net growth in family households.

4. How the increase in the number of people aged 16 to 44 feed into household change will to some extent depend upon affordability in the housing market and availability of affordable housing. If housing is affordable most people in the age group will form households of single people, couples and families. But the rate of growth of smaller households will be fastest.

5. If affordability is a barrier to household formation then two further patterns are possible...

- Families will in general take priority for the available affordable housing. This may force other single people and couples to remain hidden within their parent’s households.
- Groups of adults sharing a dwelling may become more common. The Growth in the University population will also increase this type of household.

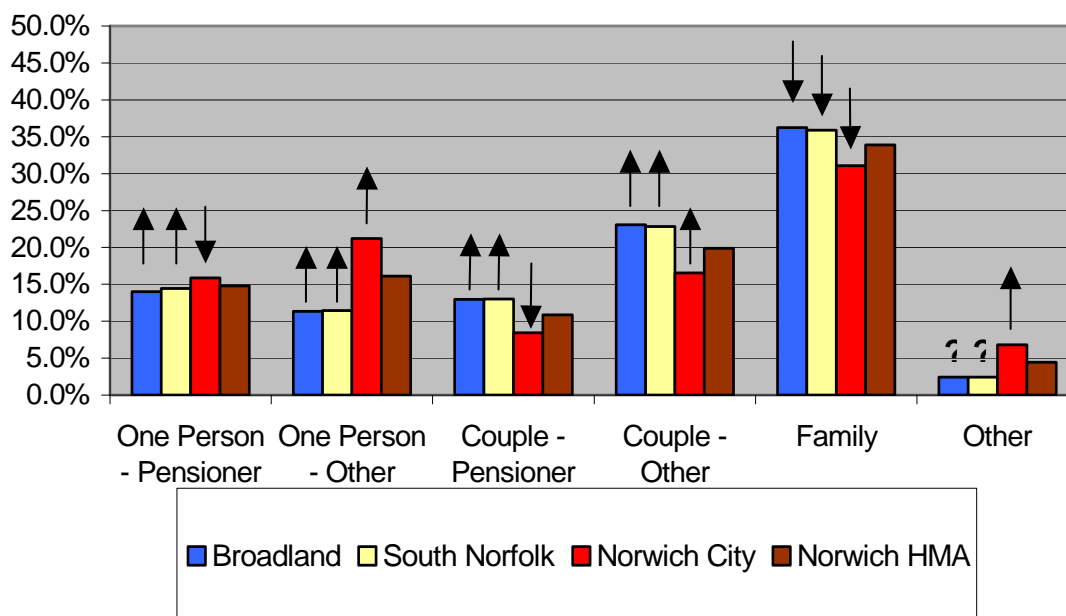
6. We know that in Norwich a large proportion of the new dwellings will be small and this meets the likely pattern of demand from single people and couple households. If we assume that for most newly forming households affordability will not be a problem it follows that the growing number people aged 16 to 44 will form small households.

Norwich Household Types – Projected Direction of Change 2001 to 2011

Household Type	2001 Number	2001 Percentage	2006 Percentage	2011 Percentage
One Person - Pensioner	8,678	15.9%	Down	Down
One Person - Other	11,571	21.2%	Up a lot	Up a lot
Couple - Pensioner	4,639	8.5%	Down	Down
Couple - Other	9,006	16.5%	Up a lot	Up a lot
Family	16,974	31.1%	Down	Down
Other	3,711	6.8%	Up	Up
Total	54,580	100.0%	100.0%	100.0%

5.5 NORWICH HOUSING MARKET AREA – HOUSEHOLD TYPE DIRECTION OF CHANGE

Household Types for 2001 by District and Norwich HMA



Source: Office for National Statistics – 2001 Census

The arrows show the projected change in proportions of household type by district. The Norwich housing market area includes all of Norwich city and parts of Broadland and South Norfolk districts. Changes in the Norwich housing market area will follow the projected patterns in the three districts but the influence of Norwich City will be most important.

In the Norwich housing market area the proportion of families looks set to fall and the number of other non-pensioner households looks set to increase. This includes the 'other' household category.

It seems likely that the proportion of pensioners will fall but this assumes the reduction in Norwich City outweighs increases in the other parts of the market area.

6 METHODOLOGY

6.1 POPULATIONS

We project parish populations in proportion to the growth in the number of households. The household growth is in turn in proportion to the projected increase in dwellings.

In Norwich where there are no parishes we use wards for 2006 and the district as a whole for 2011.

In our first set of population projections we control the Broadland and South Norfolk parish figures and the Norwich ward/district figures to the ONS/County Council district population projections.

The controlling process involves increasing or decreasing the parish (wards/district in Norwich) populations by a common factor.

	2006	2011
Broadland District Adjustment	0.9875	0.9759
Norwich District Adjustment	1.0261	0.9788
South Norfolk District Adjustment	1.0035	0.9430

For example in 2006 we reduce our Broadland parish projections to 98.75% of their original values – a reduction of 1.25%. This ensures the total population for the district is the same as the ONS/County council projection.

We would expect the adjustments to be small reflecting changes in average household size. Our population projections at the parish and ward level assume constant average household sizes.

With the exception of the South Norfolk for 2011 the adjustments are all less than 3%. The South Norfolk adjustment in 2011 is 5.7%. There are two possible explanations...

1. The ONS/County council population projection of 120,300 is low and does not fully reflect the growth in the number of dwellings and therefore households expected in 2006 to 2011.
2. Average household sizes in the new dwellings will be less than the existing 2.32 persons (2006) and this will have a significant impact on the average household size in 2011.

Our second set of population projections does not use the ONS/County council district population projections as controls. Instead, we assume a gradual decline in household sizes.

Change in Average Household Size with 2001	2006	2011
Broadland District	0.9900	0.9800
Norwich District	0.9900	0.9800
South Norfolk District	0.9900	0.9800

This approach gives population projections consistent with dwelling projections.