



Breckland HEDNA Update

Final Report

Iceni Projects Limited on behalf of
Breckland District Council

July 2025

Iceni Projects

Birmingham: The Colmore Building, 20 Colmore Circus Queensway, Birmingham B4 6AT

Edinburgh: 14-18 Hill Street, Edinburgh, EH2 3JZ

Glasgow: 201 West George Street, Glasgow, G2 2LW

London: Da Vinci House, 44 Saffron Hill, London, EC1N 8FH

Manchester: WeWork, Dalton Place, 29 John Dalton Street, Manchester, M26FW

t: 020 3640 8508 | **w:** iceniprojects.com | **e:** mail@iceniprojects.com

linkedin: linkedin.com/company/iceni-projects | **twitter:** [@iceniprojects](https://twitter.com/iceniprojects)

Contents

1. Executive Summary	1
2. Introduction.....	3
3. Housing Market Dynamics.....	6
4. Overall Housing Need	13
5. Affordable Housing Need	27
6. Sizes and Types of Homes Needed	38
7. Specialist Housing.....	43
8. Economic and Commercial Market Dynamics	49
9. Employment Land Needs	60

1. Executive Summary

- 1.1 This HEDNA Update report has been prepared to update key elements of the 2024 Breckland HEDNA to reflect revisions made by Government to the standard method for calculating housing need, together with the revised plan period for Breckland's Local Plan which now covers a 2024-42 period.
- 1.2 The Government has revised how housing need should be calculated, with its revised formula identifying a need for 920 homes a year (dpa) in Breckland – equivalent to 16,560 dwellings over the 2024-42 plan period. This is a 39% increase on the figures in the 2024 HEDNA reflecting the revised method. The HEDNA indicates that substantial population growth can be expected to arise of 23,700 over the plan period – with particularly strong growth of those aged 65+ influenced by demographic dynamics and increasing life expectancy.
- 1.3 The updated evidence points to a need for 329 affordable homes per year, split into a rented affordable need for 292 properties per year and 37 affordable home ownership homes. The evidence suggests that there would be sufficient need to increase the affordable housing policy requirement about 25%, but this needs to be balanced against what can be viably achieve, and Iceni recommend that the percentage figure is driven by the Plan's viability evidence. It recommends a 85/15 split between rented affordable housing and low cost affordable home ownership products, with a minimum of 25.5% social rented homes overall (30% of the rented affordable provision). Policies should provide provision for some flexibility in the tenure profile to take account of grant and viability considerations as appropriate.
- 1.4 The evidence points to an increase of 15,500 residents aged 65+ over the plan period. Whilst many such residents may remain in their existing home, it identifies the importance of delivering homes to M4(2) accessible and adaptable standards so that homes respond to older

residents' changing needs, as well as the role of specialist housing. The report identifies a need for 2,300 homes with support, 1,200 homes with care as well as 900 residential/nursing bedspaces over the plan period to 2042. To meet a significant need in this area, it recommends that specialist housing should be specifically sought on strategic sites of over 1,000 homes alongside policies supporting provision adjacent to market towns, local service centres and secondary villages.

- 1.5 The economic evidence indicates a similar picture to the 2024 HEDNA with challenges for the District associated with the quality of jobs. Industrial market dynamic have seen some recent weakening of demand, as interest rates have risen – with a resultant increase in the vacancy rate. The picture for offices is mixed, but with demand focused on local SME businesses and with viability challenges for new-build provision.
- 1.6 The updated modelling of employment land needs points to a need over the plan period to 2042 or up to 48,000 sq.m of office floorspace (14.6 ha of land), and for 70-75 ha of land for industrial and distribution development. Overall employment land provision of between 85-90 ha should therefore be sought through the new Local Plan.

2. Introduction

- 2.1 Iceni Projects ('Iceni') led preparation of a Housing and Economic Development Needs Assessment ('HEDNA') for Breckland which was completed in May 2024. This provided an integrated evidence base addressing the need for housing, economic growth potential and employment land needs based on the relevant national policy framework in place at that time. It considered needs over the 2021-46 period.
- 2.2 Since the HEDNA's preparation, the Government has amended national planning policies and guidance. The latest revisions to the National Planning Policy Framework ('NPPF'), and associated changes to Planning Practice Guidance ('PPG') were published in December 2024. This included revisions to the Standard Method used for calculating local housing need.
- 2.3 The Standard Method had previously been based on use of Household Projections as a baseline, to which an upward adjustment for affordability was applied based on a formula set out in the PPG. As set out in the 2024 HEDNA, this showed a need for 661 dwellings per annum across Breckland District. The report considered more recent demographic data but concluded that there were not exceptional circumstances to use an alternative approach.
- 2.4 A demographic projection linked to this level of overall housing growth was used within the report to consider the needs for different types of homes, including housing mix, older persons housing needs and to inform consideration of employment land provision through a 'labour supply scenario' which was one of the different modelling approaches consider and draw conclusions on employment land needs, following the approach set out in the PPG.

-
- 2.5 The revisions which Government has made to the Standard Method in late 2024 have changed the approach which must be used to calculate housing need within the planning system. The revised Standard Method now uses an area's housing stock as a baseline – as this is a more stable and reliable basis than the household projections. An enhanced affordability uplift is then to this baseline to generate an area's local housing need. The Government, through amendments to the NPPF, has also removed the ability to consider a 'justified alternative approach' to calculating housing need based on local data.
- 2.6 The revised standard method thus provides a mandatory starting point for the preparation of local plans. This now points to a need for 920 dwellings per annum in Breckland District. This represents a substantial 39% increase in the level of housing need which is expected to be accommodated in the new Local Plan, reflecting entirely changes made by national Government to how housing need is calculated.
- 2.7 In this context, the Council has commissioned Iceni to provide an update to the HEDNA evidence. The 2024 HEDNA remains a relatively recent piece of research, and a focused report has been prepared which updates analysis where necessary; but is intended to be read alongside the original 2024 HEDNA report and does not repeat background evidence therein. The evidence addressed needs over the now proposed 2024-42 plan period.

Report Structure

- 2.8 This remainder of this report is structured to address:
- Section 2: Housing Market Dynamics;
 - Section 3: Demographic Implications of the Standard Method;
 - Section 4: Affordable Housing Need;
 - Section 5: Sizes and Types of Homes Needed;

-
- Section 6: Housing for Older & Disabled People;
 - Section 7: Selected Other Housing Market Segments.

3. Housing Market Dynamics

- 3.1 This section has been prepared to consider short-term changes in housing market dynamics since the preparation of the HEDNA.

Housing Market Dynamics

Previous HEDNA Findings

- 3.2 The previous study concluded the following: Median house prices in Breckland sit higher than Norwich but below other neighbouring comparator areas as well as the region and country. This is in part an effect of the stock available and size of properties. Dereham and Surrounds is the most expensive sub-area overall (of the four sub-areas defined). Watton and the A11 corridor see lower overall prices but see higher prices for flats than the Dereham and Swaffham areas.
- 3.3 House prices have increased in the past 10 years with particular growth in house prices in 2020 and 2021, caused by the Covid Stamp Duty Holiday. The value of homes increased over the 5 year period to 2022. More recently house prices have been decreasing as a result of national economic factors. Sales volumes have also fallen as interest rates have risen. Given that the help-to-buy equity loan scheme had been supporting in excess of 30% of all new-build dwelling sales in Breckland; the end of this scheme and rising interest rates are likely to impact the new-build sales market in the short-term.
- 3.4 In the private rental sector average rental costs in Breckland sits below those for the Eastern region and England. The number of people claiming benefits to support rent payments increased throughout Covid. The rental market in the short-term is expected to see increased pressures as fewer households are able to buy; whilst rising interest rates and legislative changes could see private rental supply fall. This

was found to be putting pressure on rental growth and on demand for social housing.

Updated Assessment

3.5 In the year to September 2024 the median house prices in Breckland was £263,000. This lies below the regional and national averages. Amongst the HMA authorities this figure sits higher than only Norwich but below others, including the region and country. The broad geography of house prices remains consistent to the 2024 HENDA.

Table 3.1 Median House Prices (Year Ending September 2024)

Area	Price
Breckland	£263,000
Norwich	£230,000
Broadland	£290,000
South Norfolk	£300,000
North Norfolk	£310,000
East of England	£325,000
England	£289,995

Source: ONS Median House price for Administrative Geographies

3.6 Table 3.2 shows the change in median house prices from YE 2022 to YE 2024. Breckland saw a modest increase of 1.15% in the two year period. This sits very much in the centre of the range of change with the overall change highest in England and lowest in Broadland which saw a decline in its median house price of -3.33%.

Table 3.2 Median House Price Change (YE Sept 22- YE Sept 2024)

Area	Price YE Sept 22	Price YE Sept 24	% change
Breckland	£260,000	£263,000	1.15%
Norwich	£228,500	£230,000	0.66%
Broadland	£300,000	£290,000	-3.33%
South Norfolk	£290,000	£300,000	3.45%
North Norfolk	£300,000	£310,000	3.33%
East of England	£328,000	£325,000	-0.91%
England	£275,000	£289,995	5.45%

Source: ONS Median House price for Administrative Geographies

- 3.7 Table 3.3 shows the mean average sold prices for each type of property in the sub-areas. Dereham and Surrounds is the most expensive sub-area overall seeing the highest prices for Detached houses, however A11 corridor has the highest prices for the remaining three property types. The Watton sub area sees the lowest prices across all property types.

Table 3.3 House price by sub area

Area	Detached	Semi	Terrace	Flats	Overall
A11 Corridor	£384,461	£255,828	£200,509	£128,338	£292,552
Dereham and Surrounds	£393,674	£241,440	£194,878	£118,814	£296,678
Swaffham and Surrounds	£352,149	£232,469	£191,287	£113,766	£291,740
Watton	£334,934	£219,122	£175,388	£111,527	£262,108

Source: Icen analysis of HM Land Registry Data

- 3.8 Table 3.4 shows the number of each type of properties sold in the sub-areas in 2024. The A11 corridor has the highest number of properties sold overall followed by Dereham and Surrounds. Swaffham and surrounds sees the highest proportion of detached sales alongside the lowest proportion of flat sales. A majority of the sales across all sub areas were for detached properties. There is a limited market in the District for flatted properties.

Table 3.4 Sales by type by sub area (2024)

Area	Detached	Semi	Terrace	Flats	Total Sold
A11 Corridor	44.3%	25.6%	25.2%	5.0%	989
Dereham and Surrounds	45.8%	30.6%	19.4%	4.3%	805
Swaffham and Surrounds	56.8%	27.3%	12.9%	2.9%	417
Watton	48.1%	27.9%	20.6%	3.4%	262

Source: Icen analysis of HM Land Registry Data

- 3.9 Table 3.5 shows the median rent prices in Breckland, the East and England. Breckland's median prices are below that of the regional and national median for every size of property with prices in Breckland sitting at around 20-30% less than the East of England overall.

Table 3.5 Median rents PCM (May 2025)

	Breckland (£)	East of England (£)	England (£)
Overall	£879	£1,236	£1,394
One bed	£628	£855	£1,141
Two bed	£800	£1,097	£1,274
Three bed	£990	£1,332	£1,416
Four+ bed	£1,545	£1,908	£2,078

Source: Icen analysis of MHCLG data

- 3.10 The table below shows the change in rents from May 2022 to May 2025. Breckland saw average rental costs grow substantially by 18% in this period, and less than the growth seen in the Region as well as England overall. The significant growth in rents points towards demand for rented properties exceeding supply.

Table 3.6 Rental Cost Change

	Average Rental Costs (pcm)		Change	% Change
	May 2022	May 2025		
Breckland	£745	£879	£134	18.0%
East of England	£1,018	£1,236	£218	21.4%
England	£1,120	£1,394	£274	24.5%

Source: Icen analysis of PIPR data MHCLG

- 3.11 The table below shows median rental costs at a sub area level, although it should be noted that this data is limited to those properties that were advertised to rent in June 2025 and will not include properties that may have been let before being officially marketed, as such the overall rental costs do appear higher. The A11 Corridor is the most expensive sub area for rental properties with Watton seeing the lowest costs overall. This appears to match the dynamics seen in the sales market within Breckland.

Table 3.7 Rents by sub area (June 2025)

Sub-Area	Available Properties	Median Price (pcm)
A11 Corridor	92	£1,150
Dereham and Surrounds	38	£1,000
Swoffham and Surrounds	14	£1,100
Watton	6	£872.50

Source: Icen analysis of Rightmove Data

- 3.12 The Table below shows the Median workplace based affordability ratio in 2022 and 2024. In Breckland and all other areas, affordability ratios have decreased and affordability of market housing for sale improved. This means that the areas have become more affordable and is likely a factor of decreasing house prices and increasing earnings in light of the cost of living crisis. Households actual ability to buy will however equally be influenced by interest rates which have risen since 2022, but have started to fall in 2025.

Table 3.8 Median Affordability Ratio (2022 – 2024)

Area	2022	2024	Change
Breckland	9.49	8.23	-1.26
Broadland	9.13	8.10	-1.03
South Norfolk	9.52	8.19	-1.33
North Norfolk	10.72	10.29	-0.43
Norwich	7.80	6.63	-1.17
East of England	10.08	9.07	-1.01
England	8.28	7.71	-0.57

Source: MHCLG

Rental Agent Engagement

- 3.13 Icenis have sought to engage with local letting agents to understand any recent dynamics in the sector. This provides an overview of the position at the time of this report in Summer 2025.
- 3.14 Overall the market was considered by agents to be very active with demand often outstripping supply across Breckland. Agents considered there to be ongoing supply issues in the sector with many landlords choosing to sell property due to issues such as taxation changes, high interest rates which impacts landlords using buy-to-let mortgages and the Renters Reform bill. Although this trend of landlords leaving the sector was reported however to have slowed recently, with agents considering that those who were most likely to sell properties having done so already.
- 3.15 The Government's commitment to the Renters Reform Bill has been the key change in the market since the last report was undertaken, although agents did believe that the impact of this had slowed, they were also keen to note that it was not yet law. One agent considered that there may be more landlords looking to leave the sector when the Bill is passed into law.
- 3.16 Overall, Breckland was seen as popular by agents due to its good commuting links with Norwich, Thetford, Attleborough and Swaffham. Tenants were generally described as younger families and couples with one agent describing them as "would be" first time buyers. Rental

demand in these terms will be sensitive to changes to interest rates and any new first-time buyer support.

- 3.17 Generally 2 to 3 bedroom properties are considered most in demand, this is because they are attractive to many types of renters, families and couples in particular. Generally flatted dwellings were not considered to be the most popular, however some agents did see tenants looking for this type of property where their need was dictated by a smaller overall budget as flatted units are smaller and often more affordable.
- 3.18 In Thetford there was also considered to be some demand arising from US Air Force staff based at RAF Lakenheath. Generally these households were looking at larger detached “American Style” properties for which costs are often more.

4. Overall Housing Need

Assessing Housing Need

- 4.1 National government policies and guidance require housing need to be assessed as part of the plan-making process. As set out in Planning Practice Guidance (PPG):

“Housing need is an unconstrained assessment of the minimum number of homes needed in an area. Assessing housing need is the first step in the process of deciding how many homes need to be planned for. It should be undertaken separately from assessing land availability, establishing a housing requirement figure and preparing policies to address this.”¹

- 4.2 Housing need is thus expected to be assessed upfront as part of the plan-making process, leaving aside constraints. The plan-making process (and testing of development options within this) then tests whether the housing (and other development) needs identified can be sustainably met and whether there are any unmet needs which need to be accommodated, in defining what the housing requirement should be.

- 4.3 The emphasis within the NPPF is on plans meeting objectively assessed housing needs, unless national policies provide that protect areas or assets of particular importance provide a strong reason for restricting the overall scale, type or distribution of development; or the adverse impacts of doing so would significantly and demonstrably outweigh the benefits (NPPF Para 11b).

¹ PPG Para ID: 2a-001-20241212

Government's Revisions to the NPPF and Standard Method

- 4.4 The Government through revisions to the NPPF in December 2024 has revised the standard method. Its ambitions in doing so are to increase housing delivery, delivering 1.5 million homes across England over the next 5 years with growth in all areas of the country.
- 4.5 The Government's Summer 2024 consultation² highlighted concerns with the increasing vintage of the 2014-based household projections around which the standard method was designed – arguing that the dataset is now over 10 years old and no longer fit-for-purpose; whilst highlighting the volatility of household projections and issues where projections can be artificially low in some areas as demographic trends are constrained by available housing supply.
- 4.6 The consultation therefore put forward a revised standard method with a view to providing stability and certainty to all stakeholders, whilst supporting the Government's ambition to deliver 1.5 million homes and achieving a distribution of homes across the country which balanced the need for higher supply in some of the least affordable areas of the country with ensuring that all areas contribute to meeting the country's housing needs.
- 4.7 It proposed to do so through use of a baseline (Step 1) set at a percentage of existing housing stock levels (reflecting the relative size of areas and in so doing to a) reinforce development in existing urban areas where there is existing infrastructure and b) to support some rebalancing of the national distribution to better reflect growth ambitions in the Midlands and North). A stronger affordability multiplier was then

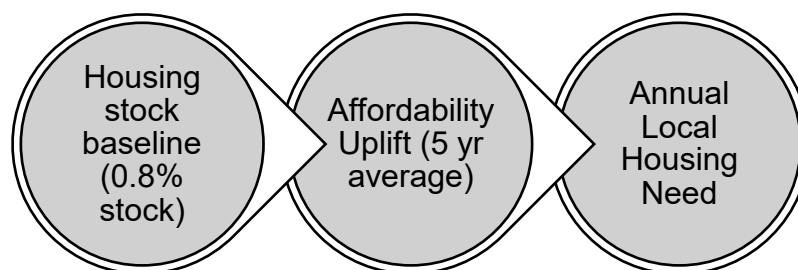
² MHCLG *Proposed reforms to the National Planning Policy Framework and other changes to the planning system*

proposed (Step 2) to reflect price pressures and market signals and direct homes to where Government considers they are most needed.

4.8 Government has taken this forward, introducing a **revised standard method** alongside the NPPF in December 2024. The PPG sets out the revised standard method in the section on *Housing and Economic Development Needs Assessments*.³

4.9 Para 2a-006 therein sets out the methodology, which takes a baseline of 0.8% of existing housing stock in the area (Step 1); to which an affordability adjustment is then applied (Step 2) which is calculated by taking the average affordability ratio figure over the 5 more recent years for which data is available, and applying a 0.95% increase for each 1% of which the averaged affordability ratio is above 5. Figure 4.1 provides an overview of the revised standard method.

Figure 4.1 Overview of Revised Standard Method



4.10 The 0.8% pa stock baseline removes the use of demographic projections (which can be volatile) and provides a baseline level of provision across all areas which is not dissimilar to the 0.89% annual increase in housing stock nationally over the last 10 years. The benchmark affordability ratio position of 5 is consistent with the ONS use of this level as a broad

³ <https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments>

indicator of affordability. With affordability uplifts applied to the stock baseline, the revised standard method supports provision of around 370,000 homes nationally which Government consider should be targeted to improve housing affordability over time.

- 4.11 Previously the NPPF provides scope to deviate from the standard method in assessing housing need in exceptional circumstances, enabling a 'justified alternative approach' to be advanced which reflects current and future demographic trends and market signals. The case for this was considered in the 2024 HEDNA, which reviewed recent demographic trends and considered alternative projections. The revisions to the NPPF in December 2024 have removed the scope to use an alternative approach – they require housing need to be assessed using the (revised) standard method.

Revised Standard Method Calculation

- 4.12 It is a relatively straight forward exercise to calculate the local housing need using the standard method for Breckland District. The calculation below uses the latest available data at the time of writing in Summer 2025.

Step 1: Housing Stock Baseline

- 4.13 The stock baseline is expected to be drawn from the MHCLG Live Table 125. The PPG in Para 2a-005 directs that 'the most recent data published at the time should be used.' The latest data on the housing stock position is for 2024. The stock baseline is calculated as 0.8% of existing stock.

Step 2: Affordability Adjustment

- 1.2 The affordability adjustment is then to be applied, based on the average median (workplace-based) house price to income ratio over the last 5 years, which at the current time is for 2020-24. The following formula is then used to calculate the affordability uplift:

$$\text{Adjustment factor} = \left(\frac{\text{five year average affordability ratio} - 5}{5} \right) \times 0.95 + 1$$

- 4.14 The final stage is to then multiple the housing stock baseline by the affordability adjustment factor.
- 4.15 The results of the revised standard method calculation using the latest published affordability and housing stock data for Breckland District are shown in Table 4.1 below. This shows a need for 920 dpa.

Table 4.1 Breckland Local Housing Need

	Breckland District
Housing Stock, 2024	65,994
0.8% Stock Baseline	528
Average Median Affordability Ratio, 2020-24	8.91
Affordability Uplift	174%
Local Housing Need (dpa)	920

- 4.16 When the Government introduced the revised standard method in December 2024 the annual housing need figure for Breckland was 903 dpa. However this figure was based on data available at that time, and should not be considered definitive for decision-making or plan-making as the inputs to the standard method are variable and not fixed.
- 4.17 The standard method calculation above takes into account affordability ratio data released by ONS on 24th March 2025, which included affordability data for 2024; together with housing stock data for 2024 in Live Table 125, as released by Government on 22nd May 2025. The increase in the housing stock baseline using the latest data, together with a decrease in the average affordability ratio (from 8.99 to 8.91) now

result in a calculation of local housing need which is 2% greater at 920 dpa.

- 4.18 As per PPG Para 2a-008, it is important to consider the latest figure up to the point of submission of the Plan. This section of the PPG sets out the following:

When should strategic policy-making authorities assess their housing need figure for policy-making purposes?

Strategic policy-making authorities will need to calculate their local housing need figure at the start of the plan-making process. This number should be kept under review and revised where appropriate.

The housing need figure generated using the standard method may change as the inputs are variable and this should be taken into consideration by strategic policy-making authorities.

However, local housing need calculated using the standard method may be relied upon for plan making for a period of 2 years from the time that the plan is submitted to the Planning Inspectorate for examination

Paragraph: 008 Reference ID: 2a-008-20241212

- 4.23 The standard method figures change when new affordability and stock data is released (typically annually in the Spring), and the Council may need to keep any changes until the point of submission of the Local Plan at which point the figures are ‘fixed’ for a period of two years.⁴

⁴ PPG Para 2a-008-20241212

Demographic Implications of the Standard Method

- 4.24 A demographic model has been developed to look at the potential implications of delivery of 920 dwellings per annum in the 2024-42 period. This considers the possibility of additional migration into the District to fill homes and also the possibility of seeing higher levels of household formation in younger age groups (where there is evidence of a historical constraint in formation). The key assumptions in the modelling are:
- Taking the 2022-based subnational population projections (SNPP) as a start point – this includes data on birth and death rates as well as migration;
 - The base position for 2024 is also taken from the SNPP with any adjustment made after this date;
 - Data about the communal population and household formation is taken from the 2021 Census with the formation rates for the population aged under 45 assumed to return to the levels seen in 2001; and
 - It is assumed that around 3% of new stock will be vacant at any time (to allow for movement within the stock and improvements to properties). This means that for 920 dpa it is assumed there would be household growth of approximately 893 per annum.
- 4.25 In developing this projection the population is projected to increase by 23,700 people over the 2024-42 period, with this increase being particularly strong in older age groups (65% of the growth is projected to be in age groups 65 and over). There is also projected to be a decline in the number of children. The two tables below show projected changes by age -the first table shows broad age bands and the second is in 5-year bands.

Table 4.2 Projected population change 2024 to 2042 by broad age bands – Breckland

	2024	2042	Change in population	% change
Under 16	23,581	22,168	-1,413	-6.0%
16-64	85,565	95,228	9,663	11.3%
65 and over	37,710	53,205	15,495	41.1%
Total	146,856	170,600	23,745	16.2%

Source: Icen analysis

Table 4.3 Projected population change 2024 to 2042 by 5-year age bands – Breckland

	2024	2042	Change in population	% change
0-4	6,524	6,682	158	2.4%
5-9	7,462	6,929	-533	-7.1%
10-14	8,044	7,117	-926	-11.5%
15-19	7,319	6,904	-415	-5.7%
20-24	6,516	7,009	493	7.6%
25-29	8,084	8,895	812	10.0%
30-34	8,889	9,921	1,032	11.6%
35-39	8,709	9,871	1,163	13.4%
40-44	8,317	10,013	1,696	20.4%
45-49	7,833	10,592	2,758	35.2%
50-54	9,691	11,147	1,456	15.0%
55-59	10,963	10,997	34	0.3%
60-64	10,795	11,318	522	4.8%
65-69	9,356	11,245	1,889	20.2%
70-74	8,726	12,509	3,783	43.4%
75-79	8,913	11,551	2,639	29.6%
80-84	5,545	8,527	2,982	53.8%
85 & over	5,169	9,372	4,202	81.3%
Total	146,856	170,600	23,745	16.2%

Source: Icen analysis

Relationship Between Housing and Economic Growth

4.26 The analysis to follow considers the relationship between housing and economic growth; seeking to understand what level of jobs might be supported by changes to the local labour supply (which will be influenced by population change). To look at estimates of the job growth to be supported, a series of stages are undertaken. These can be summarised as:

- Estimate changes to the economically active population (this provides an estimate of the change in labour-supply);
- Overlay information about commuting patterns, double jobbing (i.e. the fact that some people have more than one job) and potential changes to unemployment; and
- Bringing together this information will provide an estimate of the potential job growth supported by the population projections.

Growth in Resident Labour Supply

4.27 The approach taken in this report is to derive a series of age and sex specific economic activity rates and use these to estimate how many people in the population will be economically active as projections develop. This is a fairly typical approach with data being drawn in this instance from the Office for Budget Responsibility (OBR) – July 2018 (Fiscal Sustainability Report) – this data has then been rebased to information in the 2021 Census (on age, sex and economic activity).

4.28 The table below shows the assumptions made for Breckland District. The analysis shows that the main changes to economic activity rates are projected to be in the 60-69 age groups – this will to a considerable degree link to changes to pensionable age, as well as general trends in

the number of older people working for longer (which in itself is linked to general reductions in pension provision).

Table 4.4 Projected changes to economic activity rates (2024 and 2042) – Breckland

	Males			Females		
	2024	2042	Change	2024	2042	Change
16-19	44.9%	45.4%	0.5%	47.4%	47.8%	0.4%
20-24	84.4%	84.4%	0.0%	81.6%	81.6%	0.0%
25-29	88.3%	88.3%	0.0%	82.9%	82.9%	0.0%
30-34	89.1%	89.1%	0.0%	80.6%	80.6%	0.0%
35-39	88.3%	88.1%	-0.1%	81.8%	82.7%	0.9%
40-44	88.3%	87.4%	-0.9%	84.1%	86.1%	2.1%
45-49	87.9%	86.7%	-1.2%	82.6%	86.1%	3.5%
50-54	86.6%	85.8%	-0.8%	79.8%	83.8%	4.0%
55-59	82.2%	81.5%	-0.7%	70.3%	72.6%	2.3%
60-64	68.8%	73.4%	4.6%	55.8%	61.5%	5.7%
65-69	33.9%	45.7%	11.8%	23.6%	35.4%	11.9%
70-74	12.7%	15.6%	3.0%	7.2%	13.5%	6.3%
75-89	6.2%	6.6%	0.4%	3.0%	5.6%	2.6%

Source: Based on OBR and Census (2021) data

- 4.29 In addition, a sensitivity has been developed where the EARs are held constant at 2021 levels. It is considered the sensitivity is reasonable given data (including from the Census) has shown activity rates to have not grown as they had previously been forecast to do.
- 4.30 Working through an analysis of age and sex specific economic activity rates it is possible to estimate the overall change in the number of economically active people in the area – this is set out in the table below and shows the increase in the economically active population is projected to be up to 12,900 (an 18% increase).

Table 4.5 Estimated change to the economically active population (2024-42) – Breckland

	Econom- ically active (2024)	Econom- ically active (2042)	Total change in econom- ically active	% change
OBR EAR	71,230	84,109	12,879	18.1%
EAR no change	70,538	79,845	9,306	13.2%

Source: Icení Analysis

Linking Changes in Resident Labour Supply to Job Growth

4.31 The analysis above has set out potential scenarios for the change in the number of people who are economically active. However, it is arguably more useful to convert this information into an estimate of the number of jobs this would support. The number of jobs and resident workers required to support these jobs will differ depending on three main factors:

- Commuting patterns – where an area sees more people out-commute for work than in-commute it may be the case that a higher level of increase in the economically active population would be required to provide a sufficient workforce for a given number of jobs (and vice versa where there is net in-commuting);
- Double jobbing – some people hold down more than one job and therefore the number of workers required will be slightly lower than the number of jobs; and
- Unemployment – if unemployment were to fall then the growth in the economically active population would not need to be as large as the growth in jobs (and vice versa).

Commuting Patterns

- 4.32 The table below shows summary data about commuting to and from Breckland from the 2011 and 2021 Census. Data from both sources is used as the 2011 data is quite old, but the 2021 data could be influenced by the COVID-19 pandemic.
- 4.33 Overall, from both sources the data shows a level of net out-commuting (around 21% more people living in the District and working than work in the District in 2011 (a lower figure of 12% in 2021). This is shown as the commuting ratio in the final row of the table and is calculated as the number of people living in an area (and working) divided by the number of people working in the area (regardless of where they live).
- 4.34 When comparing the two sources it is worth reflecting on a large increase in the number of home workers (or those of no fixed workplace) in 2021 compared with 2011. In 2011, a total of 12,700 people were recorded as home workers or with no fixed workplace; in 2021 this figure had roughly doubled (to 25,300). As the country has moved away from the pandemic, it is possible this figure has started to reduce slightly with possible implications on commuting dynamics.

Table 4.6 Commuting Patterns – Breckland

	2011	2021
Live and Work in District	25,903	22,122
Home Workers or No Fixed Workplace	12,664	25,280
In Commute	12,388	11,032
Out Commute	23,227	18,248
Total Working in LA	50,955	58,434
Total Living in LA and Working Anywhere	61,794	65,650
Commuting Ratio	1.213	1.123

Source: Census 2011, 2021

- 4.35 The analysis below looks at both sets of Census data with a further sensitivity of a balanced (1:1) commuting ratio (i.e. the increase in the

number of people working in the area is equal to the number of people living in the area who are working).

Double Jobbing

- 4.36 The analysis also considers that a number of people may have more than one job (double jobbing). This can be calculated as the number of people working in the local authority divided by the number of jobs. Data from the Annual Population Survey (available on the NOMIS website) for the past 5-years (for which data exists) suggests across Breckland that typically about 3.7% of workers have a second job. It has therefore been assumed that around 3.7% of people will have more than one job moving forward – this means the number of jobs supported by the workforce will be around 3.7% higher than workforce growth. It has been assumed in the analysis that the level of double jobbing will remain constant over time.

Unemployment

- 4.37 The last analysis when looking at the link between jobs and resident labour supply is a consideration of unemployment. Essentially, this is considering if there is any latent labour force that could move back into employment to take up new jobs. The latest model-based unemployment data from the Annual Population Survey (for January 2024-December 2024) puts unemployment at around 3.3% which is a level that might be considered as full employment (noting there will always be some level of unemployment as people enter the labour market or move between jobs). No further adjustment is made to the data to take account of unemployment.

Jobs Supported by Growth in the Resident Labour Force

- 4.38 The tables below show how many additional jobs might be supported by population growth under the different projection scenarios. It is estimated

that between 8,000 and 13,400 additional jobs could be supported depending on the assumptions made about commuting and economic activity – all figures for the 2024-42 period.

**Table 4.7 Jobs supported by demographic projections (2024-42)
– Breckland**

		Total change in economic- ally active	Allowance for double jobbing	Allowance for net commuting (= jobs supported)
OBR	2021 commuting	12,879	13,373	11,903
EAR	2011 commuting	12,879	13,373	11,028
	1:1 commuting	12,879	13,373	13,373
EAR	2021 commuting	9,306	9,664	8,602
no	2011 commuting	9,306	9,664	7,969
change	1:1 commuting	9,306	9,664	9,664

Source: Iceni analysis

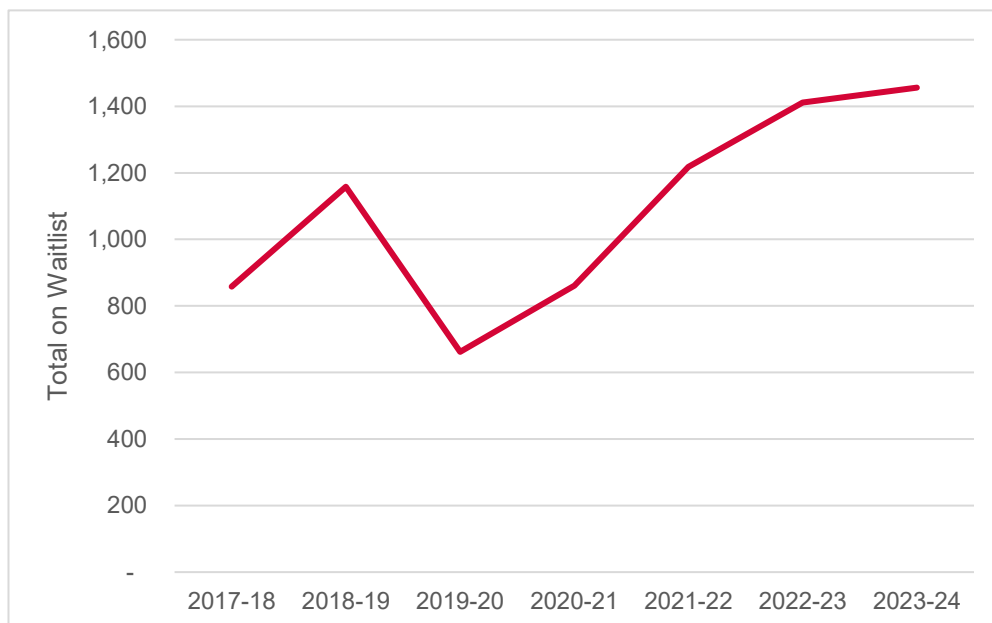
- 4.39 Whilst the number of jobs supported is sensitive to different factors, Iceni would note that the draft Local Plan sets out a vision to promote and support economic growth, diversify the District's economic base and capture investment. We have therefore tested through a labour supply scenario herein the potential to provide sufficient land supply to facilitate the higher end of the range shown (13,400 jobs).

5. Affordable Housing Need

Affordable Housing Dynamics

- 5.1 There are a number of indicators that can be considered when assessing the need for affordable housing. The first is the Council's housing register. The figure below shows the overall number of households on Breckland's housing register from 2017/18 onwards. As can be seen, after a fall in the numbers from 2018/19 to 2019/20 the overall number of registrants has been increasing each year. It is likely that this fall in 2019/20 was caused by the adoption of the new affordable housing allocation policy. There is not however a substantive difference between the numbers shown in 2023/24 as against 2022/23.

Figure 5.1 Housing Register (2017/18-2023/24)

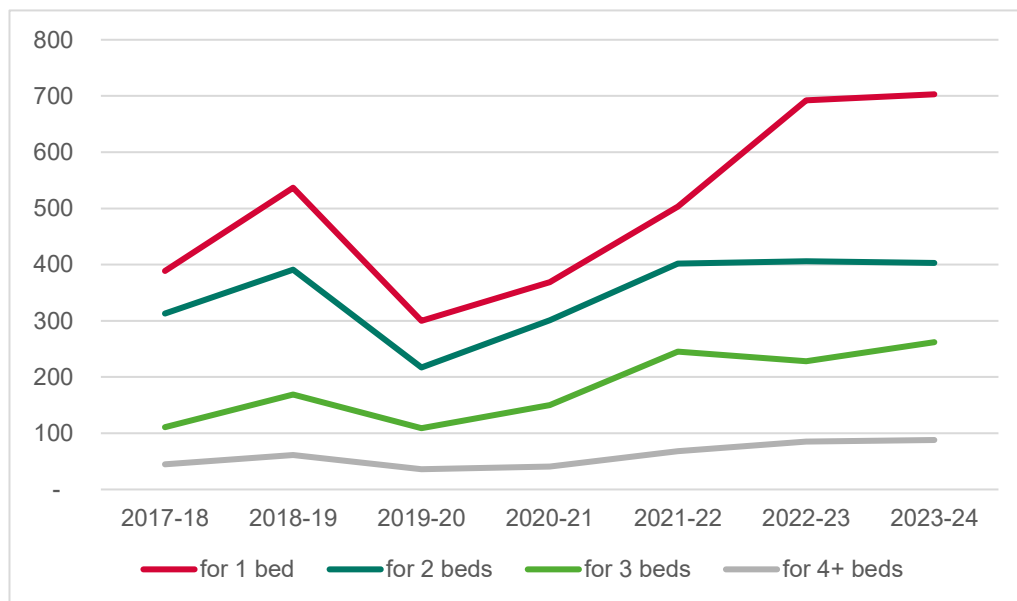


Source: Local Authority Housing Statistics

- 5.2 The figure below shows the change in waiting lists for each size of property. As can be seen, lists for all size of property declined from 2018/19 to 2019/20 again showing the impact of the revised housing allocation policy. Since then (2019/20) there has also been growth in need for all sizes of property but most significantly in need for 1

bedroom properties which has seen an increase from 300 households in 2019/20 to 703 households in 2022/24, a 134.3% increase. The need for 4+ bedroom dwellings has also increased significantly by 144% in that period, although the absolute increase is lower at 52 additional households. However again, the 2023/24 position is relatively similar to the prior year.

Figure 5.2 Waiting List by Size of Dwelling



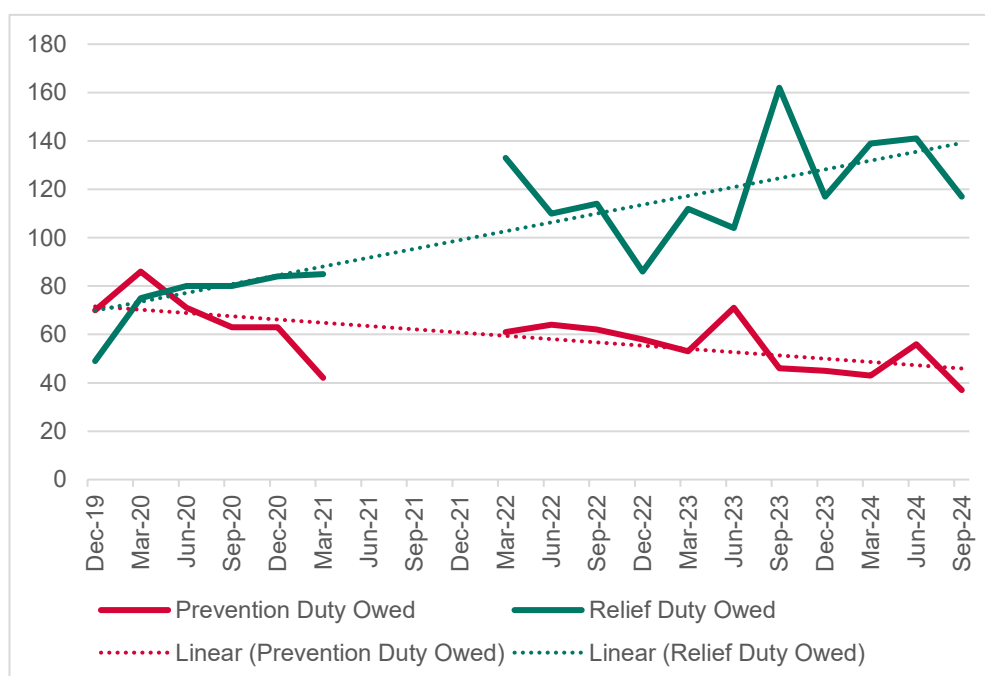
Source: Local Authority Housing Statistics

- 5.3 The figure below shows the trends in homelessness presentations in Breckland over time⁵. When a household presents as homeless the Council then assesses them to understand what type of duty they are owed, households owed a prevention duty are considered threatened with homelessness but not yet homeless, households assessed as owed a relief duty are considered to be homeless. There is a degree of overlap between the two, particularly with households who are initially assessed as being owed a prevention duty which can develop into need for relief duty (it should be noted that this is not always the case).

⁵ No data is available for June to December 2021

- 5.4 What is clear from the figure below is that while the number of households owed a prevention duty has been declining (-47% Dec 19 – Sept 24) the number owed a relief duty has been increasing (+138%). Increased in relief duty has outpaced the decline in prevention duty leading to an overall increase of 29%.
- 5.5 This shows how the need for affordable housing within Breckland is becoming more acute, particularly with more households being assessed as owed a relief duty over a prevention duty.

Figure 5.3 Homelessness presentations by type of duty owed



Source: MHCLG

- 5.6 Turning then to reasonings behind households presenting as homeless, the table below shows the table below shows this for all households owed a duty (either prevention or relief). On average, family and friends being no longer willing to accommodate is the most common reason behind homelessness at an average of 36 across the period, this is followed by the ending of a private rented tenancy at 31.
- 5.7 Domestic abuse is also a key reason behind homelessness at an average of 29 across the period. This has also seen the largest overall

increase across the period of 25 between December 2019 and September 2024. This increase is likely to be a factor behind the increasing number of relief duty presentations, often victims of domestic abuse do not seek help until it is absolutely necessary.

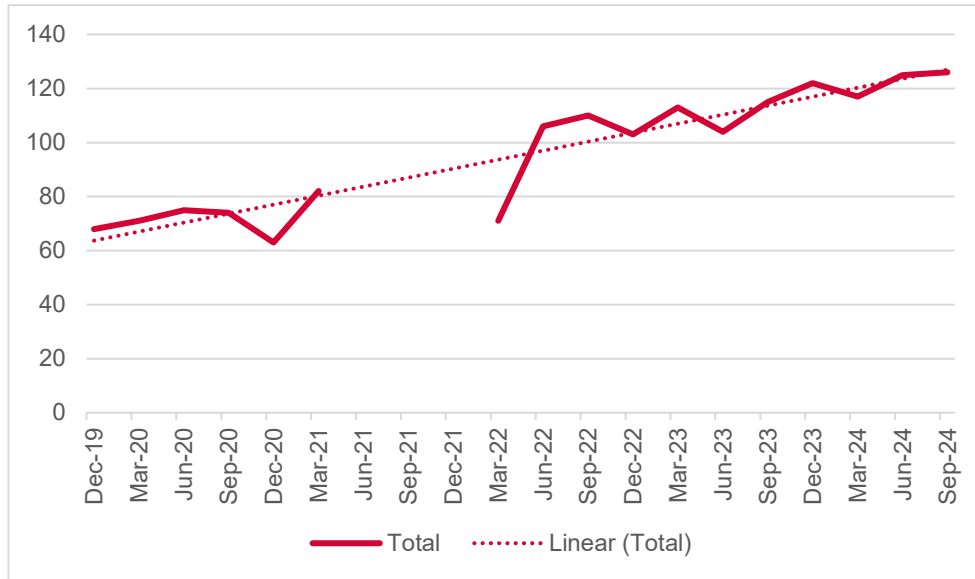
Table 5.1 Reasons behind Homelessness

	Dec-19	Sep-24	Change	Average
Family or friends no longer willing or able to accommodate	34	31	-3	36
End of private rented tenancy	27	31	4	31
Domestic abuse	15	40	25	29
Non-violent relationship breakdown with partner	12	10	-2	13
End of social rented tenancy	6	2	-4	4
Eviction from supported housing	-	3	3	3
End of private rented tenancy - not assured shorthold	1	3	2	4
Other violence or harassment	4	5	1	4
Left institution with no accommodation available	-	6	6	4
Required to leave accommodation provided by Home Office as asylum support	1	-	-1	0
Other reasons / not known	19	9	-10	19
Home no longer suitable	n.a	14	n.a	5

Source: MHCLG, Live Tables on Homelessness

- 5.8 Increasing homeless presentations directly feed into need for temporary accommodation (TA) to house those who are homeless. The figure below shows how the number of households in TA has changed over time there is a clear increase from December 2019 where only 68 households were in TA up to 126 in September 2024, an increase of 86%. In September 2024 a total of 35 households in TA in Breckland had children, this has increased slightly since December 2019 (6 households, 21%) but not to the extent seen overall.

Figure 5.4 Households in Temporary Accommodation



5.9 The table below shows the type of TA households were placed in in September 2024. As can be seen 67 households were placed in nightly paid accommodation, 17 of which had children, this is followed by 51 households in existing affordable housing stock, of which 16 had children. A further 5 households were placed in B&B accommodation and 3 in “any other”.

5.10 There were 34 households from Breckland that were placed in TA in other local authorities.

Table 5.2 Type of Temporary Accommodation

	Households (Overall)	Households with Children
Private sector accommodation leased by authority or by a registered provider	0	0
Nightly paid, privately managed accommodation, self-contained	67	17
Local authority or Housing association (LA/HA) stock	51	16
Bed and breakfast hotels (including shared annexes)	5	1
Hostels (including reception centres, emergency units and refuges)	0	0
Any other type of temporary accommodation (including private landlord and not known)	3	0
In TA in another local authority district	34	
Duty owed, no accommodation secured	0	0

Source: MHCLG

Affordable Housing Need

- 5.11 The above evidence points to a relatively similar position in terms of housing costs and affordable housing need indicators to that shown in the 2024 HEDNA report and indicates that the evidence therein on affordable housing need should continue to provide a robust basis for policy formulation.
- 5.12 It is however necessary to made some minor adjustments to the analysis to align the affordable housing needs evidence with the revised plan period (which is 2024-42) and to review conclusions on the mix of affordable homes needed to reflect the greater flexibility to respond to local needs evidence provided for in the 2024 NPPF.
- 5.13 In the modelling of the need for social/affordable rented housing, the current need shown in Table 8.9 in the 2024 HEDNA was converted into an annual flow by dividing by 25 to reflect the 2021-46 plan period. However the revised plan period is 18 years (2024-42). A revised annual figure for the flow to meet current need can therefore be calculated, as shown in Table 5.3.

Table 5.3 Estimated current housing need for social/ affordable rented homes by sub-area

	Number in need	Excluding those in affordable housing	Annualised
A11 Corridor	825	601	33
Dereham & Surrounds	572	425	24
Swaffham & Surrounds	313	213	12
Watton	234	182	10
TOTAL	1,944	1,421	79

- 5.14 There are no changes to the annualised figures for newly-forming households, existing households falling into need and relet supply.

- 5.15 Recalculating the affordable housing need on this basis, the rebasing of the figures to reflect the plan period indicates a need for 320 rented affordable homes per year. Sub-area figures are shown in Table 5.4 below.

Table 5.4 Estimated Need for Social/Affordable Rented Housing (per annum)

	Current need	Newly forming households	Existing households falling into need	Total Gross Need	Relet Supply	Net Need
A11 Corridor	33	152	51	236	105	131
Dereham & Surrounds	24	112	33	169	69	100
Swaffham & Surrounds	12	59	18	89	48	41
Watton	10	46	13	69	21	48
TOTAL	79	368	115	562	242	320

Source: Derived from a range of sources

- 5.16 We can apply the same approach to the calculations of the affordable home ownership need. Spreading the backlog over the revised plan period here results in a gross need for 292 dpa (rather than the 284 figure shown in 2024 HEDNA Table 8.20). This is shown below.

Estimated Gross Need for Affordable Home Ownership

	Current need	Newly forming households	Existing households falling into need	Total Gross Need
A11 Corridor	13	97	14	124
Dereham & Surrounds	10	78	10	98
Swaffham & Surrounds	4	30	4	38
Watton	3	25	3	31
TOTAL	29	231	32	292

Source: Derived from a range of sources

-
- 5.17 Then adopting consistent assumptions on supply (affordable home ownership supply plus a contribution from market sales below LQ levels), as shown in Table 5.5 below, an annual need for 37 affordable home ownership homes per annum is shown.

Table 5.5 Estimated Need for Affordable Home Ownership by sub-area (per annum)

	Total Gross Need	Supply	Net Need
A11 Corridor	124	93	31
Dereham & Surrounds	98	84	14
Swaffham & Surrounds	38	45	-7
Watton	31	32	-1
TOTAL	292	255	37

Source: Derived from a range of sources

Mix of Affordable Housing

- 5.18 The updated evidence continues to point towards the acute need for affordable housing in Breckland being for rented affordable housing. The HEDNA concluded that there will be a need for both social and affordable rented housing – the latter will be suitable particularly for households who are close to being able to afford to rent privately and possibly also for some households who claim full Housing Benefit. It is however clear that social rents are more affordable and could benefit a wider range of households – social rents could therefore be prioritised where delivery does not prejudice the overall delivery of affordable homes.
- 5.19 When looking at AHO products, the 2024 HEDNA analysis is less conclusive about the scale of the need, although it is certainly much lower than the need for rented affordable housing. The evidence does suggest that there are many households in Breckland who are being

excluded from the owner-occupied sector (as evidenced by increases in the size of the private rented sector). It is likely that a key issue in the Council area is about access to capital (e.g. for deposits, stamp duty, legal costs) as well as potentially mortgage restrictions (e.g. where employment is temporary) rather than simply the cost of housing to buy (although this will be an important factor for many households).

- 5.20 Importantly, the HEDNA found no specific need for First Homes and its conclusions here remain up-to-date and appropriate.
- 5.21 The Council's June 2024 Reg18 consultation on the draft Local Plan sought 25% affordable housing on major sites but was not specific about the tenure mix. Ultimately the tenure mix will need to be informed by the housing needs evidence, but also tested through a Whole Plan Viability Study.
- 5.22 The NPPF sets out policies for affordable housing in Paragraphs 64-66. The amendments to these policies do not set specific policy requirements for affordable home ownership (as the previous NPPF did). Instead they expect planning policies to specify the type of affordable housing required and to define a minimum proportion of social rent homes, and for the policies overall to meet identified local needs.
- 5.23 The split between rented affordable and affordable home ownership need in the needs evidence is 89%:11%, however we would note that the underlying modelling assumes a notable contribution to the low cost home ownership need from existing properties sold below LQ values. We consider that to boost delivery overall, and the supply of intermediate housing in the District, the Council should seek 85% rented affordable housing and 15% low cost home ownership.
- 5.24 The next question arising is then the split of need within these categories.

-
- 5.25 Table 8.18 in the 2024 HEDNA broke down the profile of the rented affordable housing need and has been replicated below.

Table 1.1 Estimated need for affordable rented housing (% of households able to afford)

	% of households able to afford
Afford affordable rent	31%
Afford social rent	30%
Need benefit support	39%
All unable to afford market	100%

Source: Affordability analysis

- 5.26 This suggests that of those in need of rented affordable housing, 31% can afford affordable rents, 30% can afford current social rents (but not affordable rents) and 39% need benefit support to afford either. This would point towards a minimum of 30% of the rented affordable housing being at social rent levels, and potentially up to 70% (if those who required benefit support were included within this category).
- 5.27 In setting policies there is a balance here between what maximising provision of homes which are genuinely affordable and in doing so minimising the housing benefit bill on the one hand; and maximising the overall delivery of affordable housing. Thus whilst it would be ideal to house the majority of those seeking rented affordable homes in social rented housing, there is a strong case for some provision at affordable rents in order to maximise delivery.
- 5.28 **We would recommend on this basis that a minimum of 30% of the rented affordable housing is provided at social rents, with up to 70% if there is funding support provided to the scheme.** This is consistent with the 2024 HEDNA findings.
- 5.29 For intermediate housing, shared ownership and rent-to-buy homes should be prioritised as they are affordable to a wider range of households. Minimum shared ownership shares of 20% should be offered.

-
- 5.30 Where First Homes or Discounted Market Housing is provided, a discount of at least 30% should be provided to ensure that it is affordable to households on local incomes.

6. Sizes and Types of Homes Needed

- 6.1 The analysis below updates information in Section 9 of the HEDNA in terms of the mix of homes required by size and tenure. This report updates the modelling and conclusions on the basis of demographic projections linked to the Standard Method and does not repeat other analysis which was mainly drawn from the 2021 Census and has therefore not been updated.

District-wide Housing Mix

- 6.2 Consistent with the HEDNA the analysis below sought to apply a demographic projection to data about local occupancy patterns by age and tenure. Adjustments were then made to the modelling to take account of overcrowding and under-occupancy before providing conclusions about a suitable mix of homes by tenure.
- 6.3 The table below shows the projected change in households by age of household reference person, this shows growth as being expected in all age groups and in particular older age groups. The number of households headed by someone aged 50-64 is projected to see a more modest increase over the period studied.
- 6.4 The pattern of change is similar to the HEDNA but with generally stronger growth in some younger age groups – this is due to these groups projected to see stronger population growth with the new Standard Method (as younger people are more likely to be a migrant population).

Table 6.1 Projected Change in Household by Age of HRP in Breckland (linked to Standard Method)

	2024	2042	Change in Households	% Change
Under 25	1,171	1,665	494	42.2%
25-34	7,091	8,140	1,048	14.8%
35-49	13,220	16,590	3,370	25.5%
50-64	18,333	19,355	1,022	5.6%
65-74	10,009	13,240	3,231	32.3%
75-84	9,838	13,710	3,873	39.4%
85+	3,777	6,817	3,040	80.5%
TOTAL	63,439	79,517	16,077	25.3%

Source: Icen analysis

- 6.5 The table below shows the initial modelling of mix for three broad tenures. This (as in the HEDNA) is based on looking at both local and regional occupancy patterns and is prior to any adjustments to take account of overcrowding and under-occupation). Market housing focusses on 3+-bedroom homes, affordable home ownership on 2- and 3-bedroom accommodation and rented affordable housing showing a slightly smaller profile again. The outputs are very similar to those in the HEDNA.

Table 6.2 Initial Modelled Mix of Housing by Size and Tenure – Breckland

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	3%	23%	46%	28%
Affordable home ownership	18%	37%	34%	11%
Affordable housing (rented)	29%	37%	31%	4%

Source: Icen analysis

- 6.6 The analysis then moves on to consider ‘rightsizing’ taking account of overcrowding and under-occupation. The analysis does not seek to remove all under-occupation as there will inevitably be households who

choose to live in a home larger than their needs (particularly in the market sector which is the sector with the highest levels of under-occupation).

6.7 The HEDNA report provided detail about levels of overcrowding and under-occupation by tenure and the method used to reduce these over time (including modelling to remove overcrowding). The table below shows an analysis following the same method as in the HEDNA.

6.8 The adjustments for under-occupation and overcrowding lead to the suggested mix as set out in the following table. It can be seen that this tends to suggest a smaller profile of homes as being needed (compared to the initial modelling) with the biggest change being in the market sector – which was the sector where under-occupation is currently most notable. Again the outputs are very similar to those in the HEDNA.

Table 6.3 Final Modelled Mix of Housing by Size and Tenure – Breckland

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	11%	34%	37%	18%
Affordable home ownership	23%	42%	27%	8%
Affordable housing (rented)	32%	37%	26%	5%

Source: Iceni analysis

6.9 On the basis of the modelled outputs and taking account of Housing register data (which also does not look to have significantly changed) it is considered that **the recommendations in the HEDNA about the appropriate mix of housing by size and tenure remain unchanged from those presented in the HEDNA.**

Smaller-area Housing Mix

- 1.3 As with the HEDNA, the mix analysis has also been provided for the four sub-areas linking to earlier population and household projections and an understanding of the current mix of housing in different areas. The analysis is an update from the HEDNA and details (such as current stock profile from the Census) have not been repeated below.
- 1.4 The three tables below show estimates of need in the three broad tenure categories. The findings are generally similar to the HEDNA and do not show any significant differences between locations. As with the HEDNA it is therefore concluded that the differences are not sufficiently clear-cut to suggest a different mix of housing at a sub-area level.

Table 6.4 Modelled size requirement by sub-area – market housing

	1-bed	2-beds	3-beds	4+-beds
A11 Corridor	12%	33%	38%	17%
Dereham and Surrounds	11%	38%	36%	15%
Swaffham and Surrounds	11%	38%	35%	16%
Watton	11%	37%	37%	16%
TOTAL	11%	35%	37%	17%

Source: Icen analysis

Table 6.5 Modelled size requirement by sub-area – affordable home ownership

	1-bed	2-beds	3-beds	4+-beds
A11 Corridor	23%	41%	28%	8%
Dereham and Surrounds	26%	44%	24%	6%
Swaffham and Surrounds	22%	42%	28%	8%
Watton	21%	43%	29%	7%
TOTAL	23%	42%	27%	7%

Source: Icen analysis

**Table 6.6 Modelled size requirement by sub-area –
social/affordable rented**

	1-bed	2-beds	3-beds	4+-beds
A11 Corridor	32%	35%	28%	5%
Dereham and Surrounds	36%	36%	24%	4%
Swaffham and Surrounds	33%	40%	23%	4%
Watton	29%	39%	26%	6%
TOTAL	33%	37%	26%	5%

Source: Icenl analysis

7. Specialist Housing

Understanding the Drivers of Need

- 7.1 The analysis below updates key parts of Section 10 of the HEDNA in terms of the number of people with disabilities and the need for specialist housing for older people and wheelchair users. The HEDNA included a range of analysis (mostly from the 2021 Census) which has not been updated and therefore is not repeated below with the key changes being related to population projections developed in line with the new Standard Method.

Projected Population Change

- 7.2 The table below shows that Breckland is projected to see a notable increase in the older person population. The projection linked to the Standard Method shows a projected increase in the population aged 65+ of around 41% - the population aged Under 65 is in contrast projected to increase by a more modest 8%.
- 7.3 In total population terms, the projections show an increase in the population aged 65 and over of 15,500 people. This is against a backdrop of an overall increase of 23,700 – population growth of people aged 65 and over therefore accounts for around 65% of the total projected population change.
- 7.4 When compared with the HEDNA the general picture is similar, with the main difference being driven by a change in the dates used for projecting (2021-46 in the HEDNA and 2024-42 in this report). Using up-to-date (2022-based) population projections does also look to have driven greater projected growth in the 65-74 age group compared with the HEDNA.

Table 7.1 Projected Change in Population of Older Persons, 2024 to 2042 – Breckland (linking to Standard Method)

	2024	2042	Change in population	% change
Under 65	109,146	117,396	8,250	7.6%
65-74	18,082	23,754	5,672	31.4%
75-84	14,458	20,078	5,621	38.9%
85+	5,169	9,372	4,202	81.3%
Total	146,856	170,600	23,745	16.2%
Total 65+	37,710	53,205	15,495	41.1%
Total 75+	19,627	29,450	9,823	50.0%

Source: Icenis analysis

- 7.5 The outputs from this projection are used below to update a range of analysis in the HEDNA.

Health Related Population Projections

- 7.6 The table below updates analysis on projected changes to the number of people with a range health conditions. This is based on applying prevalence rates to the population projections – the rates used are the same as in the HEDNA and take account of age specific health/disabilities as shown in the 2021 Census.
- 7.7 As with the analysis in the HEDNA the large increases in the number of older people with dementia (increasing by 60% from 2024 to 2042 and mobility problems (up 52% over the same period) are notable. Changes for younger age groups are smaller, reflecting the fact that projections are expecting older age groups to see the greatest proportional increases in population.
- 7.8 Overall, the outputs from this analysis show similar patterns to the HEDNA with the main difference being related to the shorter projection period – which sees lower increases across all age groups.

Table 7.2 Projected Changes to Population with a Range of Disabilities

– Breckland

Disability	Age Range	2024	2042	Change	% Change
Dementia	65+	2,620	4,196	1,576	60.2%
Mobility problems	65+	6,807	10,332	3,526	51.8%
Autistic Spectrum Disorders	18-64	905	1,013	108	11.9%
	65+	348	490	142	40.8%
Learning Disabilities	15-64	2,327	2,578	251	10.8%
	65+	758	1,067	309	40.7%
Impaired mobility	16-64	5,562	6,058	496	8.9%

Source: Icen analysis

Norfolk Specialist and Retirement Housing Study – 2021

- 7.9 Produced by Three Dragons and Opinion Research Services in 2021 this report considers the need for specialist and retirement housing across the whole of Norfolk. Overall the Norfolk population is rapidly aging population, with the number of households aged 75 and over projected to increase by 41.7% between 2016 and 2041. As such the report is key to consider how suitable housing options can be provided.
- 7.10 Across Norfolk, there was an unmet need for 2,809 Extra Care units and 3,203 Sheltered Housing units in 2020. This is projected to rise significantly by 2041, reaching 5,130 Extra Care units and 9,644 Sheltered Housing units. In Breckland in 2020 there was considered to be an unmet need of 504 Extra Care units and 1,300 Sheltered Housing units.
- 7.11 In the Residential Care sector historic rates suggest a need for 6,500 additional bedspaces by 2041 in Norfolk overall. This is however considered to be a significant over estimate as rates for entering residential care have been falling.
- 7.12 Accessible and Adaptable Housing (M4(2) and M4(3)) is also important with a total need across Norfolk expecting to be 27,6000 by 2041. Of

this at least 6,300 wheelchair-adapted homes (M4(3)) will be required across the county.

- 7.13 In 2020 there were 9,363 specialist retirement housing units in Norfolk, with 88% being sheltered housing and only 12% Extra Care. Notably, Breckland had the smallest number of specialist retirement housing units at 555. The provision of new Sheltered and Extra Care housing for market sale is generally viable in most high and medium value areas of Norfolk, it is "more problematic" in low-value areas.
- 7.14 The report encourages local authorities to adopt proactive planning policies to increase the supply of accessible housing (M4(2) and M4(3)) and facilitate the development of retirement housing schemes. Policies should refer to demand scale, specify provision in major general needs schemes, encourage smaller accessible schemes where large sites are absent, clarify standards and locational criteria.

Specialist Housing Need

- 7.15 The analysis below updates the HEDNA in looking at the need for a range of different types and tenures of specialist housing for older people (as defined in the HEDNA).
- 7.16 The analysis shows a current need for all types of specialist housing other than residential care bedspaces and a need moving forward to 2042 in all categories. For housing with support (sheltered/retirement housing) a need for around 2,300 units is identified with 54% in the affordable sector. For housing with care (e.g. extra-care) a need for 1,200 units is shown, 55% as market housing. The analysis also projects a need for around 900 additional nursing and residential care bedspaces (mainly nursing care) but that currently supply and need/demand are broadly in balance.

- 7.17 When compared with the HEDNA, the main difference is the analysis below showing a need for affordable housing in the housing with support category. This has been driven by revisions in estimates of supply, which have shown a much lower number of properties in this category than was estimated at the time of the HEDNA.

Table 7.3 Specialist Housing Need using adjusted SHOP@Review Assumptions, 2024-42 – Breckland

		Housing demand per 1,000 75+	Current supply	Current demand	Current shortfall / surplus (-ve)	Addition -al demand to 2042	Shortfall /surplus by 2042
Housing with support	Market	44	222	864	642	432	1,074
	Affordable	77	1,004	1,510	506	755	1,261
Total (housing with support)		121	1,226	2,373	1,147	1,188	2,335
Housing with care	Market	23	25	456	431	228	660
	Affordable	20	54	398	344	199	543
Total (housing with care)		44	79	854	775	428	1,203
Residential care bedspaces		39	927	760	-167	380	213
Nursing care bedspaces		44	602	854	252	428	680
Total bedspaces		82	1,529	1,614	85	808	893

Source: Icen analysis

Wheelchair User Housing

- 7.18 The final updated analysis uses the population and household projections to estimate the need for homes for wheelchair users. Again the same method as in the HEDNA has been used. The analysis estimates a total need over the 2024-42 for 731 additional homes for wheelchair users – 41 per annum. This is higher than the per annum figure in the HEDNA (29 per annum).

Table 7.4 Estimated need for wheelchair user homes, 2024-42

		need (2024-42)	and future need
Breckland	550	181	731

Source: Icení analysis

Meeting the Specialist Housing Need

- 7.19 Whilst the majority of older people will remain in general needs housing, the evidence does point to a notable need for specialist housing. Consideration should therefore be given to how the Local Plan supports the delivery of this.
- 7.20 The policies in the Reg18 draft Local Plan are supportive of specialist housing on sites adjacent to market towns, local service centres and secondary villages (draft Policy HOU12). This is a permissive policy.
- 7.21 Icení consider that having regard to the scale of the need, the Council should also require specialist housing to address the needs of the District's growing older population on key strategic sites – such as within any allocation of over 1,000 dwellings. The Council should ideally set out expectations regarding the level of provision (such as a minimum of 60 units or 70 bedspaces).

8. Economic and Commercial Market Dynamics

Key Economic Dynamics and Characteristics

- 8.1 In the 2024 HEDNA Iceni made an assessment of the overall economic baseline in Breckland, the table below summarises the Strengths, Weaknesses, Opportunities and Threats of Breckland's local economy as identified within that report.
- 8.2 Overall the District was considered to have a strong small business base, the manufacturing sector was considered to be growing, with opportunities for wider growth in well-paid economic activities such as professional, scientific and technological, as well digital and renewable energy.
- 8.3 The report identified evidence that would support seeking business investment and growth as well as skills development.

Table 8.1 SWOT Analysis

Strengths	Weaknesses
• High business survival rates • Growing and strong manufacturing sector. • Low unemployment rate • Greater presence of medium and large businesses than comparator areas. Recent employment growth in higher value sectors – professional, scientific and tech • Employment growth in the tourism sector	• Lower levels of NVQ4+ educational attainment than comparator areas. • Low levels of labour productivity. • Low resident and worker earnings. • Low economic activity rate • Prevalence of lower skilled employment. • Underrepresentation of employment and low jobs density

Opportunities	Threats
• To build on a strong manufacturing sector through growth and/or innovation (e.g. a shift to more productive types of manufacturing) and provision of new employment space. • Potential to increase resident earnings through improved training and education enabling them to access well-paid employment in the Borough. • Attract investment and growth in digital, life sciences, agri-tech and renewable energy through the Cambridge-Norwich Tech Corridor • Increased home-working offers opportunity to attract high value, high skilled employees from urban areas and provide an improved lifestyle	• Challenging business environment (high energy costs, general inflation and potential reduced spending) may lead to a reduction in business survival rates. • Loss of overall employment in the past 5 years.

Source: Icen Projects

Evidence from More Recent Trends

- 8.4 What more recent data tells us regarding recent employment growth and jobs density; sectoral performance; and business growth/survival – keep brief.
- 8.5 The table below shows the split of employees by sector in Breckland. It can be seen that Manufacturing is the largest sector in Breckland with 17.4% of employment, followed by Retail and Heath with 9.7% of employment each. Admin and support services is the next largest sectors, making up 8.7% of employment. Breckland's agricultural sector makes up 5.8% of employment recorded by BRES in the District, although it should be noted that BRES data often under-records agricultural employment.

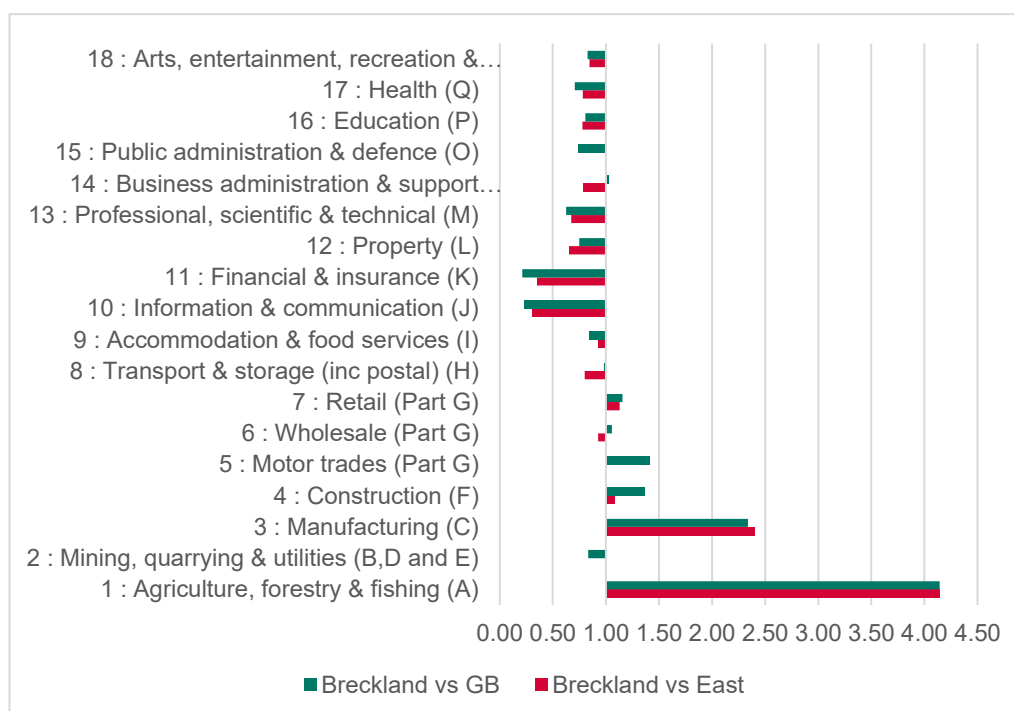
Table 8.2 Employment by Sector

	Employment	(%)
Agriculture	3,000	5.8
Mining and Quarrying	500	0.9
Manufacturing	9,000	17.4
Construction	3,500	6.8
Motor Trades	1,250	2.4
Wholesale	2,000	3.9
Retail	5,000	9.7
Transportation and Storage	2,500	4.8
Hospitality	3,500	6.7
Information and Communications	500	0.9
Financial and Insurance	350	0.7
Real Estate	800	1.5
Professional, Scientific And Technical	3,000	5.8
Admin and Support Service Activities	4,500	8.7
Public Admin And Defence	1,750	3.3
Education	3,500	6.7
Health Care And Social Work	5,000	9.7
Arts, Entertainments And Recreation	2,000	3.9
Total	51,650	

Source: Icenl analysis of BRES data

- 8.6 Breckland has a higher proportion of employment in Agriculture, with an LQ of over 4. In addition, Breckland has a higher proportion of employment in manufacturing, with a location quotient of approximately 2.4. Other sectors which have an above average representation include construction and wholesale/retail.

Figure 8.1 Location Quotient Jobs by Sector (2023)



Source: Icen analysis of BRES data

8.7 The table below shows the split of enterprises in Breckland by size compared to the FEMA (Breckland, Broadland, North Norfolk, South Norfolk and Norwich), East and England as a whole. The differences are that Breckland has a slightly lower proportion of micro enterprises than the East and England but a higher proportion than the FEMA. Breckland has a greater number of small and medium enterprises than the East and England but less than the FEMA. In addition, Breckland only has 15 large enterprises and a lower proportion than all comparator areas.

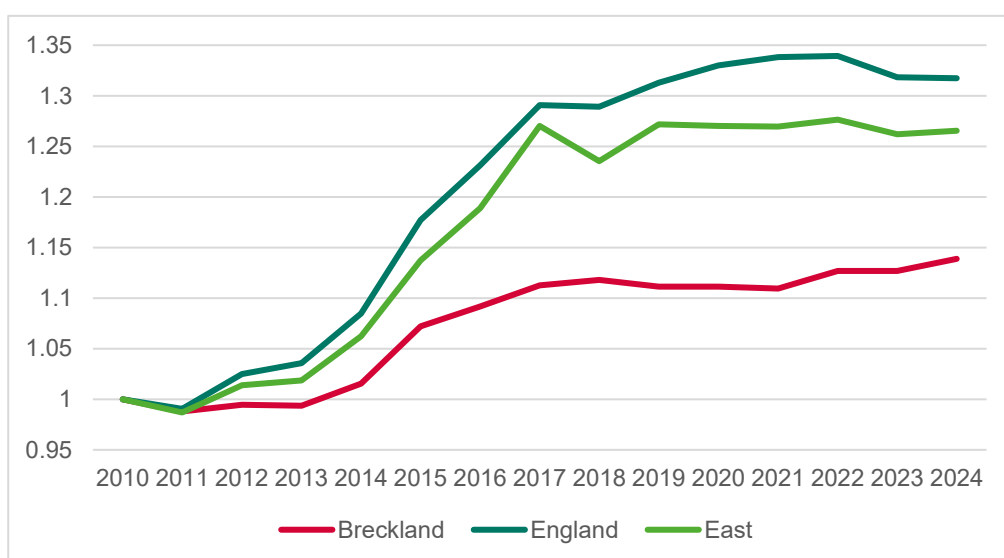
Table 8.3 Split of Enterprises by Size, Breckland vs the FEMA, East and England

	Breckland (no.)	Breckland	FEMA	East	England
Micro (0 to 9 employees)	4,630	88.87%	87.82%	89.69%	89.24%
Small (10 to 49)	450	9.56%	8.42%	8.42%	8.73%
Medium-sized (50 to 249)	115	1.7%	1.52%	1.52%	1.6%
Large (250+)	15	0.29%	0.32%	0.37%	0.42%

Source: Icen analysis of ONS data

8.8 The figure below shows the indexed rate of change in the number of enterprises in Breckland compared to the East and England as a whole between 2010 and 2024. It can be seen that the rate of enterprise growth in Breckland was much slower than the wider comparator areas (although, as explored below, survival rates are relatively high). Since 2017, enterprise growth in Breckland has flattened off; a similar trend occurred in the East of England region.

Figure 8.2 Indexed Enterprise Growth, Breckland vs the East and England



Source: Icen analysis of ONS data

8.9 Table 8.4 shows business survival rates in Breckland compared to the East and England between 2018 and 2022. This data strongly indicates that new start businesses in Breckland tend to do well and survive with survival rates much higher than the benchmarks particularly for businesses over 3 years old. However levels of starts have evidently been below wider benchmarks.

Table 8.4 Business Survival Rates, Breckland vs the East and England

Survived at least...	Breckland	East	England
1 year - Born 2022	95.3%	95.1%	94.8%
2 years - Born 2021	76.5%	75.1%	74.3%
3 years - Born 2020	63.5%	58%	57.5%
4 years - Born 2019	52.9%	47.8%	47.2%
5 years - Born 2018	48.2%	40.4%	39.4%

Source: Iceni analysis of ONS data

- 8.10 Higher than average levels of employment in the lower occupational levels and low levels of educational attainment feed into lower earnings for those living in Breckland, in comparison to the East and Great Britain. Median gross earnings for residents working full-time in 2024 stood at £683 per week for Breckland, this is 6.4% below the average for the East and 10.5% below the national average. There is a large differential between male and female residents' earnings, with men earning an average of 17.8% more than women (£108 per week).

Figure 8.3 Median Gross Weekly Residence Based Earnings, 2024



Source: Iceni analysis of Annual Population Survey

- 8.11 While still lower than the wider comparator areas, those working in Breckland, on average earn less than those living in East or England. This suggests that a portion of the population are commuting out to

higher paid jobs. Full time workers working in Breckland earn on average £635 a week compared to those living in East earning an average of £725. Full-time workers in Breckland earn 12.4% less than those working in the East and 13% less than the national average. Again there is a large differential between male and female full-time earnings.

Figure 8.4 Median Gross Weekly Workplace Based Earnings, 2024



Source: Icen analysis of Annual Population Survey

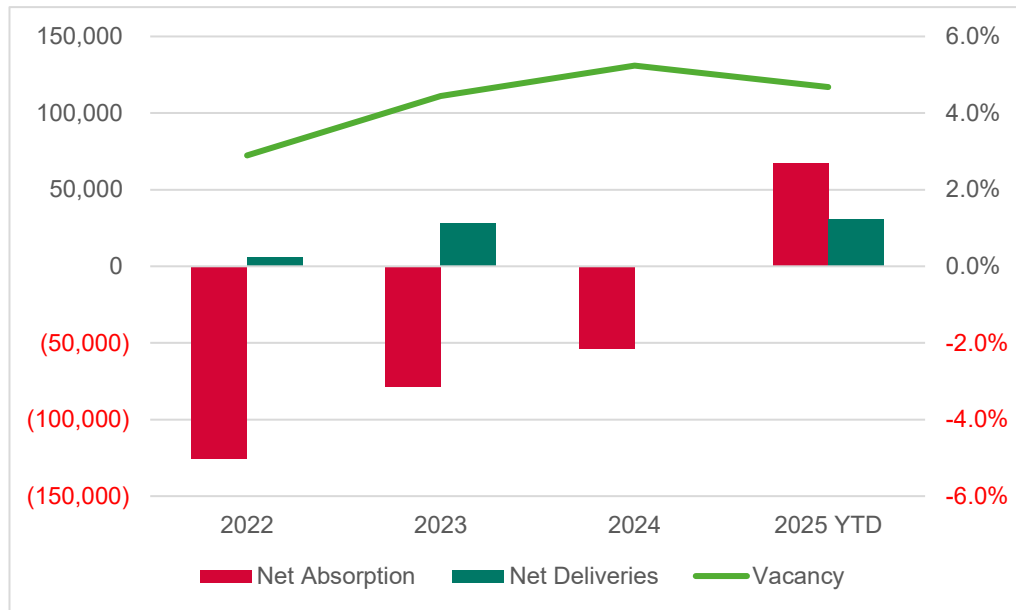
Recent Commercial Market Dynamics

Industrial

- 8.12 The 2024 HEDNA summarised the Industrial market in Breckland as modest sized and focused towards SME occupiers. Key demand drivers were considered to be manufacturing and agri-tech. The amount of stock in Breckland had increased since 2013.
- 8.13 The market saw very low vacancy rates of just 2.3% which suggested a need for new-build space to better support businesses although viability challenges were identified in regard to this with low rental values.

-
- 8.14 According to CoStar, since 2022 industrial stock in Breckland has grown by 58,700 sqft (5,400 sqm) this amounts to an increase of 0.85% of stock with a total inventory of c. 6,863,000 sqft (637,000 sqm) in July 2025.
- 8.15 In terms of vacancy rate this has also increased from 2.9% in 2022 to 3.9% in July 2025. This increase can be seen as positive as more stock availability supports better churn in the market and supports businesses to grow.
- 8.16 Despite increasing vacancy rates which can put downward pressure on rental costs, the costs per sqft in Breckland have actually increased from 2022 to July 2025. Although the actual growth figure is low at £0.39 this does equate to an 8% growth from 2022 to 2025.
- 8.17 Turning then to net absorption, net deliveries and vacancy, the figure below shows the trend from 2022 onwards. Net absorption has been negative in 2022, 2023 and 2024, with more stock moved out of than in to, this has led to the increasing vacancy rates mentioned above. 2025 is the only year that has seen positive net absorption with more space moved into than out of, this has contributed to the slight decline in vacancy between 2024 and 2025. Net deliveries were also positive in 2022, 2023 and 2025 this will also have contributed to the increased vacancy.

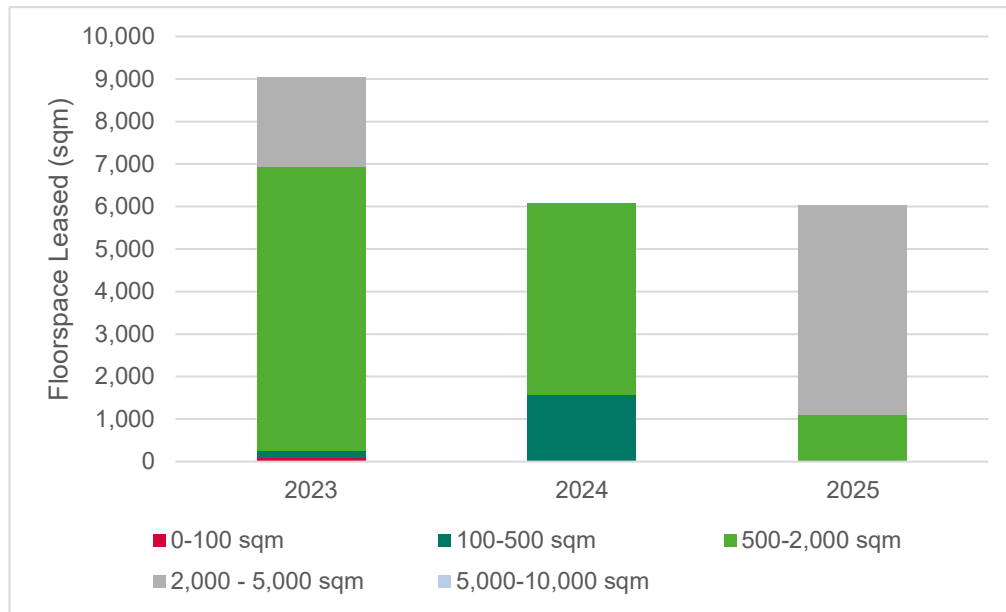
Figure 8.5 Net Absorption, Net Deliveries and Vacancy



Source: CoStar

- 8.18 Figure 8.6 shows the amount of floorspace leased each year from 2023-2025. Activity appears to be concentrated in the 500-2,000 sqm band with 56% of all deals made within this band. This is followed by the 100-500 sqm band at 28% of all deals made.
- 8.19 When considering how this has changed from the 2024 HEDNA it can be seen that generally the market has shifted towards some of the mid-sized units in Breckland. In the initial HEDNA key sizes bands were the 100-500 sqm band (46% of deals between 2017 and 2022) followed by the 2,000-5,000 sqm band (27% of deals 2017-2022)

Figure 8.6 Leasing Activity by Size Band (sqm)



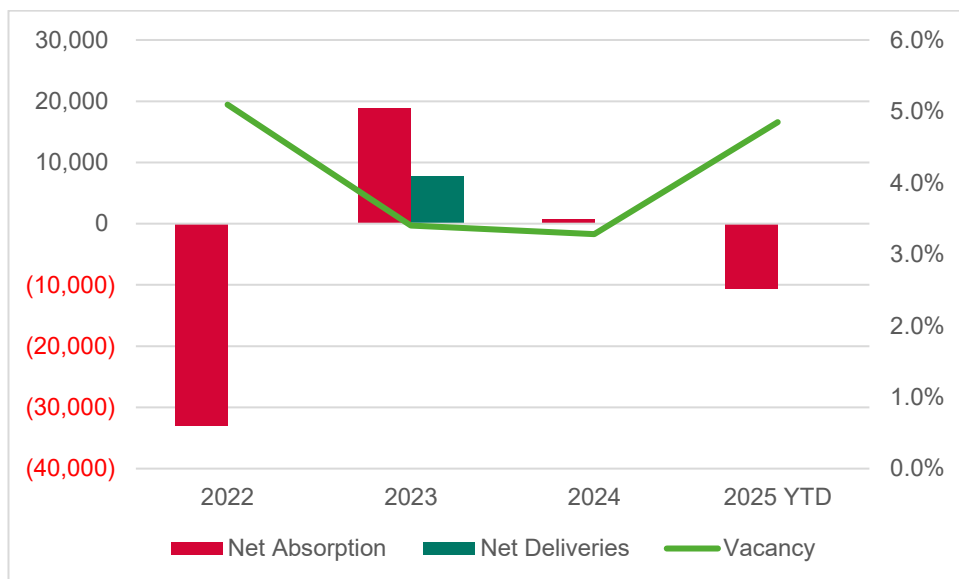
Source: CoStar

Office

- 8.20 The office market in Breckland was summarised in the 2024 report as small and localised. Businesses are often small/micro in size and seeking smaller spaces of <100 sq.m. With low demand and rental costs, significant new development is unlikely to come forwards.
- 8.21 Some modest schemes have been delivered in Breckland. According to CoStar, since 2022 office stock in Breckland has grown by 7,800 sqft (724 sqm) this amounts to an increase of 1.2% of stock with a total inventory of c. 676,000 sqft (62,800 sqm) in July 2025.
- 8.22 In terms of vacancy rate this has decreased slightly from 5.1% in 2022 to 4.8% in July 2025. Although this is a decline overall this figure still allows for sufficient churn in the market and choice for businesses looking to relocate.
- 8.23 Rental costs in Breckland have increased also in this time from £7.20 per sqft in 2022 to £13.86 in July 2025. However the rental tone still makes new-build development challenging in viability terms.

8.24 Turning then to net absorption, net deliveries and vacancy, the figure below shows the trend from 2022 onwards. Net absorption was negative in 2022 and so far in 2025, with more stock moved out of than in to. However in 2023 and 2024, net absorption was positive meaning more space was moved into than out of, this led to a slightly decreased vacancy rate in these two years. Net deliveries were also positive in 2023, although this was outpaced by the positive net absorption.

Figure 8.7 Net Absorption, Deliveries and Vacancy



Source: CoStar

8.25 When looking at office lease deals that have been made in Breckland from 2022 onwards the figure below shows this by size band of the floorspace leased in the deal. Overall the amount of floorspace leased each year has been low, none has been leased in the first half of 2025 with only 138 sqm leased in 2024 and 44 sqm in 2022. The most activity is seen in 2023 with 1,953 sqm leased across 8 deals, the largest deal in this year was for 652 sqm of floor space at Raymond Street, Thetford, CoStar does not list the tenant.

9. Employment Land Needs

HEDNA Approach and Modelling

- 9.1 The 2024 HEDNA considered the demand for employment land and floorspace over the period from 2021 to 2046. The assessment considered the scale of need through a number of models, three of which are required by the Planning Practice Guidance (PPG). These are set out below:
- Sectoral and employment forecasts and projections (labour demand);
 - Demographically derived assessments of future employment needs (labour supply techniques); and
 - Analysis based on the past take-up of employment land and property and/or future property market requirements.
- 9.2 The labour demand model built on forecasts from Oxford Economics (OE) as a baseline for employment growth but noted that OE projections are lower than historical trends and do not account for specific local sector strengths or strategic investments.
- 9.3 In order to address the limitations of the baseline, alternative growth forecasts were developed by analysing historical trends (2001-2019 and 2011-2019, excluding pandemic distortions) and incorporating feedback from key stakeholders. Key priorities such as the development of new commercial space along the A11 and duelling of the A47 were highlighted.
- 9.4 Specific adjustments were applied to sectors such as; manufacturing (+590 jobs), construction (+1,430 jobs), transport and storage (+170 jobs), accommodation and food services (+ 780 jobs), professional/

scientific/technical services (+ 2,520 jobs), and administrative and support services (+2,190 jobs), reflecting their historical growth rates.

- 9.5 A labour supply scenario was then modelled to determine the level of jobs that could be supported by the projected housing provision. It assumed that housing delivery consistent with the previous standard method figure (661 dwellings per annum) would support a workforce growth of approximately 12,500 (12,429) over the 2021-2046 plan period.
- 9.6 The report also considered historical completions (net and gross) and net absorption of floor space (the balance between occupied and vacated space). A mixture of Council monitoring, VOA and CoStar data was used. The modelling of the gross completions trends took the average annual completions from 2008/09 to 2017/18 and forecasts the need

Updated Modelling

- 9.7 The remainder of this section seeks to update the assessments of employment land need made in the previous HEDNA report. It considers the new plan period (2024-42) as well as newer data available. The overall methodology remains the same as in the original report with data on completions and net absorption updated to consider the years between 2014/15 and 2023/24.⁶
- 9.8 Updated data has meant that the 'margin for flexibility' equivalent to two years' worth of gross completions for offices and five years for industrial and warehousing has changed. It now equates to a total of 3,650 sqm

⁶ This report also corrects some calculation errors in the original report that saw the flexibility margins applied twice

for office and R&D and 50,554 sqm for industrial, warehousing and mixed B.

- 9.9 The allowance for replacement demand has also changed with calculations now assuming this will sit at half the rate of historical losses for industrial / warehouse (being 2,022 sqm per annum) and at 20% of historical losses for offices (265 sqm per annum).

Labour Demand

- 9.10 Initially looking at jobs growth from the three labour demand scenarios growth over the period from 2024 to 2042 is equivalent to c. -220 FTE jobs under the baseline scenario, 6,400 under the Alternative Scenario and 11,100 under the Labour Supply Scenario. The Labour Supply scenario assumes a 1-1 commuting ratio seeking to improve the balance between jobs and homes in Breckland over time, as well as capturing changes to pensionable age and some growth in women and older people more generally in work.

Table 9.1 Total Jobs and FTE Jobs Growth by Model, 2024-42

Model	Total Jobs	FTE Jobs
OE Baseline	206	-219
Alternative Scenario	6,117	5,135
Labour Supply Scenario	13,400	11,100

Source: Icení analysis of OE / BRES data

- 9.11 Looking then at growth in FTE jobs by sector, the table below shows that the majority of employment growth is expected in non-b and non-E(G)(i-iii) uses. This is similar to that predicted in the original report albeit with slightly bigger losses under the baseline forecast and less growth in the alternative and labour supply scenarios.

Table 9.2 FTE Jobs Growth by Model and Use Class, 2024-42

Model	FTE Jobs	FTE Jobs in E(G)(i-iii), B2 and B8 Premises
OE Baseline	-219	-1,759
Alternative Scenario	6,447	1,641
Labour Supply Scenario	11,100	2,276

Source: Icení analysis of OE / BRES data

- 9.12 When the 'margin for flexibility' and allowance for replacement demand is applied this results in the below requirements for each of the labour based models. The range of need varies significantly from c 16,000 sq.m under the baseline to 349,400 sq.m under the labour supply scenario. The very low figure in the baseline scenario is driven primarily from low forecasted need in Industrial and Warehousing which is a result of the decline forecast in the Manufacturing sector. Where the alternative scenario seeks to be more positive on this it therefore increases the need for industrial/warehousing space.

Table 9.3 Employment Floorspace Requirement by Labour Demand Models Baseline and Alternative Scenarios and Labour Supply Model, 2024-2042 (sqm)

Floorspace (sqm)	OE Baseline	Alternative Scenario	Labour Supply Scenario
Office and R&D	13,731	19,311	56,201
Office and R&D - Post Pandemic WFH 50%	15,158	14,578	47,994
Industrial and Warehousing	982	124,079	301,440
Total	16,141	138,657	349,434

Source: Icení analysis of OE data

Past Completions

- 9.13 As mentioned, completions data has been updated to take into account newly available data. In the previous assessment Breckland Council monitoring data from 2014/15 to 2017/18 was used to consider the Gross Completions, it remains the best available data for this period. In order to update this, it has been supplemented with data on

employment completions from Norfolk County Council cross referenced with CoStar and planning application data by IcenI. Net completions data has been updated also to take into account new data from VOA.

Table 9.4 Average Completions (sqm)

	Gross Completions	Net Completions*
Time Period	2014/15- 2023/24	2014-2023
Office and R&D	1,825	500
Industrial	2,912	5,400
Warehousing	5,325	
Mixed B	1,874	
Total	10,111	5,900

*Source: IcenI analysis of data from Breckland Council and Norfolk County Council and VOA**

- 9.14 The table below shows the results of these forecasts when the margin and allowance for replacement demand are taken into account. As in the original report, a 20% “stretch target” is added in order to recognise the potential for additional growth.

Table 9.5 Employment Floorspace Requirement by Completions Projection, 2024-42

Floorspace (sqm)	Gross Completions	Net Completions
Office and R&D	36,499	17,420
Industrial and Warehousing	231,549	221,958
Total	269,048	239,377
Total +20% stretch	322,858	287,253

*Source: IcenI analysis of data from Breckland Council and Norfolk County Council and VOA**

Net Absorption

- 9.15 Finally looking at the Net Absorption scenario, the table below shows the average annual net absorption by use from 2011 onwards.

Table 9.6 Average Net Absorption (sqm)

Floorspace (sqm)	2010-2024
Office	582
Industrial and Warehousing	3,866

Source: IcenI analysis of CoStar data

- 9.16 As in the original report this is then projected forwards across the plan period with the margin for flexibility then added. Losses data is not included as net absorption data will already include this. This results in a need for 134,000 sq.m of commercial space over the revised plan period.

Table 9.7 Employment Floorspace Requirement - Net Absorption Projection, 2024-42

Floorspace (sqm)	Net Absorption
Office	14,122
Industrial and Warehousing	120,141
Total	134,263

Source: IcenI analysis of CoStar data

Overall Need Conclusions

- 9.17 This section has update a range of forecasting undertaken in the 2024 HEDNA report to include new data as well as over a slightly shorter plan period. The tables below summarises the total employment land need as discussed in each of the models above.
- 9.18 A key consideration in this updated evidence is balancing homes and jobs and thus the labour supply scenario provides a helpful upper bound in doing so. However this needs to be reviewed alongside the wider evidence.
- 9.19 For office space, the majority of the trend-based scenarios show a need for between 14,000 – 19,000 sq.m over the plan period. However the

gross completions scenario is notably higher (36,500 sq.m); whilst the labour supply scenario shows a higher need still (48,000 – 56,200 sq.m). Iceni consider that the preferred scenario should be the labour supply scenario with the work from home adjustment reflecting that there are benefits from aligning homes and jobs and the higher provision relative to historical trends aligns with the Council's aspirations; whilst on the other hand recognising the challenging viability backdrop for standalone office provision together with the impact which changing working patterns have had. **The Council should therefore plan for around 48,000 sq.m of office space (14.6 ha) over the plan period to 2042.**

9.20 For industrial space, the labour demand models are likely to underplay future market requirements given the influence of productivity improvements and replacement demand (which effective result in some recoupling of jobs and floorspace needs). The gross completions scenario on the one hand and the 'stretch' model above this informed conclusions in the 2024 HEDNA – the latter reflecting economic opportunities arising from A14 improvements. Adopting a consistent approach here would result in a need for 58.1 – 69.8 ha. However the labour supply model now points to a need for up to 75.4ha. There is a broad alignment between the evidence here, indicating that **the Council should plan on the basis of between 70-75 ha of industrial space over the plan period to 2042.**

9.21 It is therefore recommended that the council seek to plan for 14.6 ha of space for office provision and 70 - 75 ha is for industrial and warehousing. **Overall, this equates to between 85-90 ha of employment land over the plan period.**

Table 9.8 Employment Floorspace Requirement Summary, 2024-42 (including margin and replacement demand) (sqm)

Floorspace (sqm)	OE Baseline	Alternative Scenario	Labour Supply Scenario	Gross Completions	Net Completions	Net Absorption
Office and R&D	13,731	19,311	56,201	36,499	17,420	14,122
Office and R&D Post Pandemic	15,158	14,578	47,994			
Industrial and Warehousing	982	124,079	301,440	232,549	221,958	120,141
Total	16,141	138,657	349,434	269,048	239,377	134,263

Table 9.9 Employment Land Requirement Summary, 2024-42 (including margin and replacement demand) (ha)

Floorspace (sqm)	OE Baseline	Alternative Scenario	Labour Supply Scenario	Gross Completions	Net Completions	Net Absorption
Office and R&D	4.6	6.4	17.3	12.17	5.81	4.71
Office and R&D Post Pandemic	5.1	4.9	14.6			
Industrial and Warehousing	0.2	31.0	75.4	58.14	55.49	30.04
Total	4.8	35.9	90.0	70.30	61.30	34.74
Total +20% 'stretch'				84.36		
