Norfolk Economic Strategy: Evidence Base

August 2024

Produced by the Norfolk Office of Data & Analytics (NODA)

This document has been compiled by the Norfolk Office of Data & Analytics using publicly available data.

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Insight for action

Contents

Foreword from Strategy

Norfolk is perfectly placed to be a major contributor to the UK economy. With strengths in clean energy, agri-food, financial services, advanced manufacturing and engineering and digital technology, the county will play a leading role in the industries of the future. Recognised for international excellence, we hold our sectors in high regard. We will use our ambitions, opportunities and expertise to leverage investment to become a hub of high value economic activity.

With our diverse and outward-looking economy, over 100 miles of coastline, historic and cultural assets, rural landscapes, coastal communities, market towns and three urban centres (including the iconic medieval city of Norwich), Norfolk boasts a unique and distinctive identity, strengthened by its people's passion and pride of place.

County, district, borough and city councils have long worked collaboratively and effectively with businesses, our universities and colleges, and community and voluntary organisations to create a successful and forward-looking economy. Collectively, we recognise our potential and our opportunities. We have the vision, appetite and ability to deliver significant growth for the county and the country.

Norfolk's diverse economy and specialist strengths mean there are few places so uniquely equipped to make impactful contributions to the major challenges facing the UK and the world in the 21st century: food and energy security, healthy ageing, climate change, and rapid technological advances. Together with our business community, we will continue to address the ever-growing market demands brought by these challenges, and to be a world-renowned centre of research excellence.

We also recognise our challenges. Not everyone in our county has the right life chances, and too many of our residents are unable to access good jobs, healthcare and the chance to learn new skills. Like other rural and coastal areas, Norfolk has faced historical imbalances of underfunding and lacks key infrastructure for housing and business growth. We can and must do better.

It is our firm belief that developing our infrastructure, investing in public transport, joining-up education, skills and jobs, providing support for our businesses, managing our land and water resilience, and looking after our environment, will enable our county to grow and our people to live well.

It is with great pleasure that we introduce Norfolk's Economic Strategy 2024-2029, the central mission of which is to improve productivity, to drive growth and improved standards of living. But we don't believe we have to choose between a healthy economy and a healthy county. So, the strategy is not only focused on increasing GVA, but it also aims to drive and shape economic growth for the wider benefit of the people, communities and businesses in Norfolk, and our natural environment and heritage. This strategy acts as our Local Growth Plan, identifying local priorities and the key role it will play in the Government's new national Industrial Strategy. It closely aligns to the Government's Five Missions in shaping our ambitions, including Norfolk's key role in making the UK a clean energy superpower, and breaking down barriers to opportunity and kickstarting economic growth. The strategy also

highlights the significance of improving productivity and proactively addressing health inequality. We will work with government to achieve sustained high growth for our region, cement our role as a clean energy superpower, build a health sector suitable for our needs and challenges, and remove barriers to opportunity for all, whilst ensuring the safety and prosperity of Norfolk's residents.

This strategy is just a start. We are building a vision for the long-term future of the county, an ambition that cannot be achieved by any one organisation, one that needs us to work closely together to deliver impact for our county, making the most of our collective strengths and powers. This is our time. This is Norfolk's time.

Introduction to the Evidence Base

This evidence base is intended as a companion document to the Norfolk Economic Strategy 2024. The evidence base consists of the core data sets that informed and underpinned the analysis and narrative in the Strategy.

We've predominantly relied on Office for National Statistics and other comparable central government data releases in compiling the evidence base, as these data sets are constructed around well recognised, comparatively stable data methodologies, which also facilitate (in most instances), benchmarking matrices at a national, regional, Local Enterprise Partnership (LEP) and local authority level. We've accessed the most up-to-date data available, in March 2024.

Information drawn from the evidence base produced by Partnering Regeneration Development Ltd (PRD) for developing a 'mission-based' 20-year growth vision for Norwich, will inform the development of the Norwich Economic Strategy.

In the future we will review the overall economic landscape in Norfolk on a regular basis and publish the findings.

People

Key Metrics Analysis - People

This section looks at:

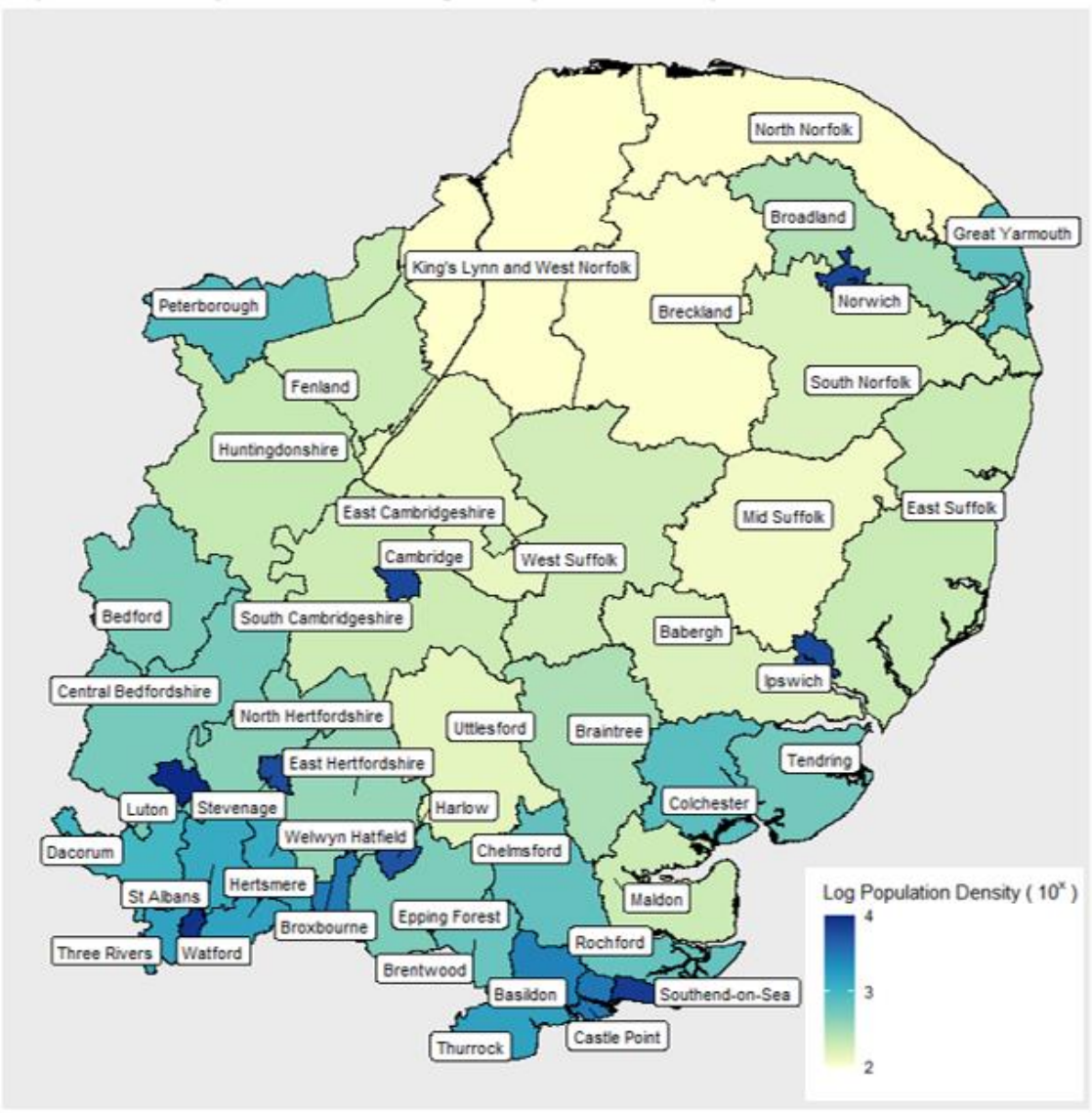
- Norfolk's population and how it has changed over time
- Employment Rate
- Pay
- Economic Inactivity
- Occupational Profile
- Claimant Count
- Deprivation
- Fuel Poverty
- Early Years Education
- Not in Education, Employment or Training (NEET)
- Student Population
- Skills and Qualifications
- Other Qualifications
- No Qualifications
- Index of Multiple Deprivation (IMD) – Education, Skills, and Training
- Adult Education Rate/POLAR4 Quintile
- Apprenticeship Starts
- Healthy Life Expectancy

Population

Norfolk has an estimated population of around 931,943 people and its population has a much older age profile than England, with 24.8% aged 65 and over, compared with 18.7% for England.

Norfolk's population aged 65 and over are more concentrated within the rural and coastal parts of the county, in contrast to the working age and younger residents being within the more urban areas. Figure 1 below shows the population density within the East of England region and highlights areas of high population density in Norwich, Ipswich, Cambridge, Luton, East Hertfordshire, Watford, and Southend-on-Sea.

Figure 1: Population density (number of usual residents per square kilometre) within the East of England by local authority district (2023)

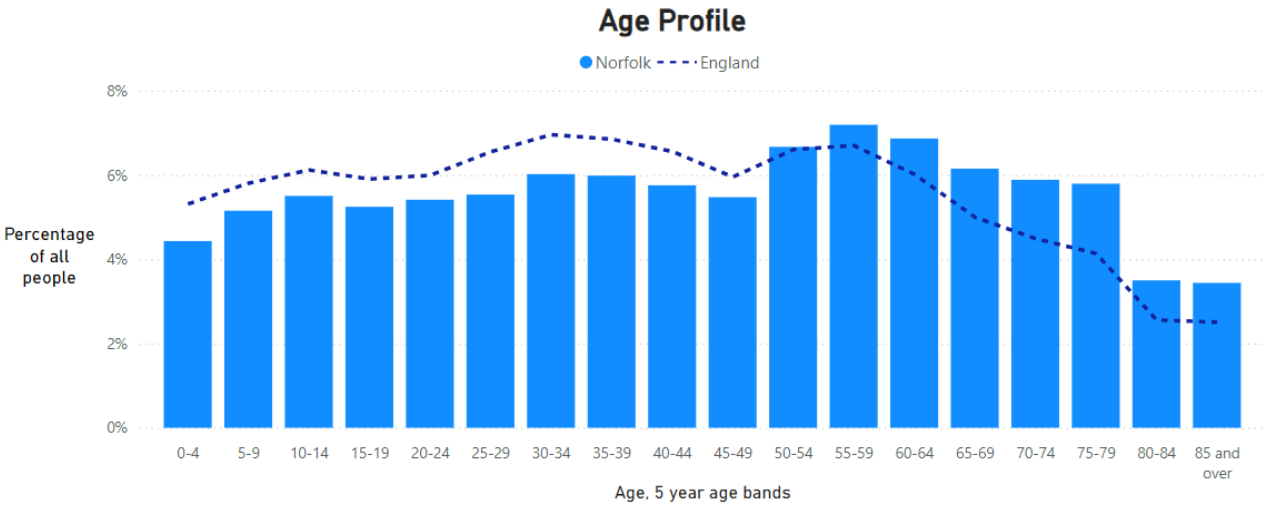


Source: Population density for local authorities in England and Wales, mid-2011 to mid-2023

Source: Mid-Year Population Estimates, England and Wales, June 2023

Figure 2 shows the percentage of all people in Norfolk grouped in five-year age bands. The percentage of Norfolk's population aged 50 and over are all the same as, or higher than the England average. The percentage of Norfolk's population aged under 50 falls below England's average.

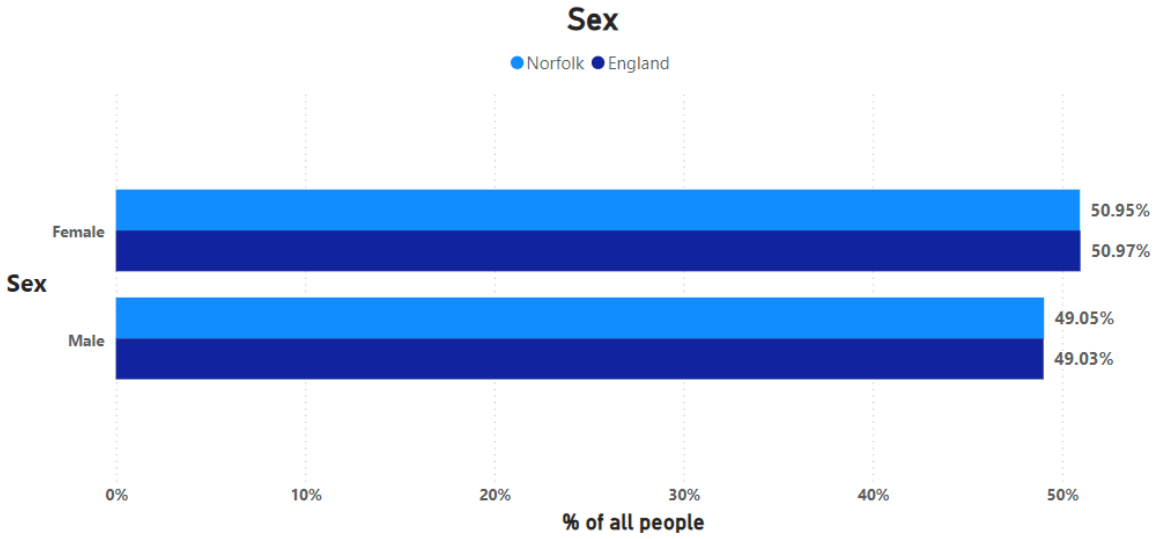
Figure 2: Age profile of Norfolk compared to England



Source: Mid-Year Population Estimates, England and Wales, June 2023

Figure 3 shows the percentage of the population by sex in Norfolk (shown in light blue) compared to England (shown in dark blue). Females make up 50.95% of Norfolk's population, males make up 49.05%. This appears to be in line with the England average.

Figure 3: Population by sex in Norfolk compared to England



Source: Mid-Year Population Estimates, England and Wales, June 2023

Population by District

Table 1 shows the estimated population and population density of Norfolk's districts, Norfolk, and England. It should be noted that population density refers to the number of residents per square kilometre.

King's Lynn and West Norfolk is the most populated local authority district with around 155,758 residents. Great Yarmouth has the lowest population, at around 100,065 residents.

Norwich is the most densely populated district in Norfolk with around 3,731 residents per square kilometre. The least densely populated districts are King's Lynn and West Norfolk and North Norfolk, both with 108 and 107 residents per square kilometre respectively.

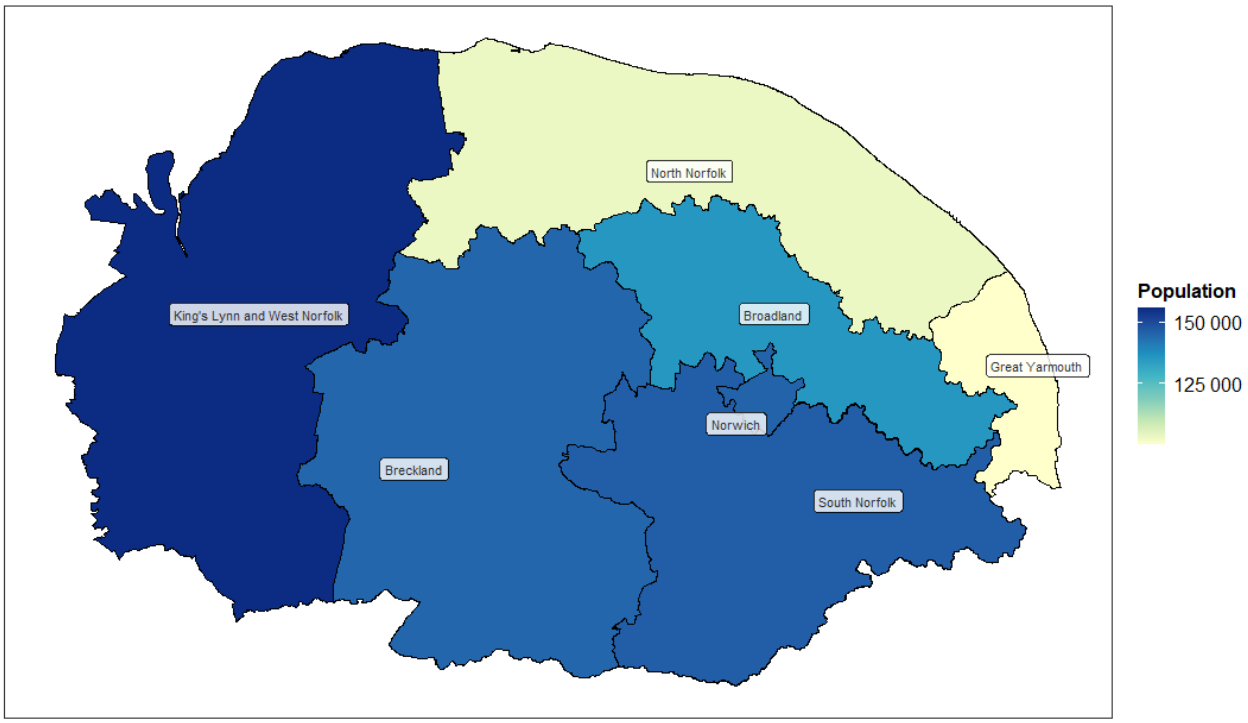
Table 1: Population estimates and density by area for Norfolk districts, Norfolk and England.

Location	Population (estimate)	Population density
Breckland	145,081	111
Broadland	135,565	246
Great Yarmouth	100,065	574
King's Lynn and West Norfolk	155,758	108
North Norfolk	103,228	107
Norwich	145,591	3,731
South Norfolk	146,655	162
Norfolk	931,943	173
England	57,690,323	443

Source: Nomis Population Dataset , Population estimates - local authority based by single year of age, 2023

Figure 4 shows the population of residents in each Norfolk district using the population figures in Table 1.

Figure 4: Norfolk population by district (2023)



Source: Nomis Population Dataset , Population estimates - local authority based by single year of age, 2023

Population by Age – Statistical Neighbours

Figure 5 shows the percentage of population by age for Norfolk and its statistical neighbours. A statistical neighbour is a region or area that is considered to be similar to another based on specific socio-economic, demographic, or other relevant statistical criteria. For Norfolk, statistical neighbours such as Suffolk and Somerset have been identified because they share comparable characteristics such as population, industry, deprivation and rurality, allowing for meaningful comparisons in data analysis and policymaking.

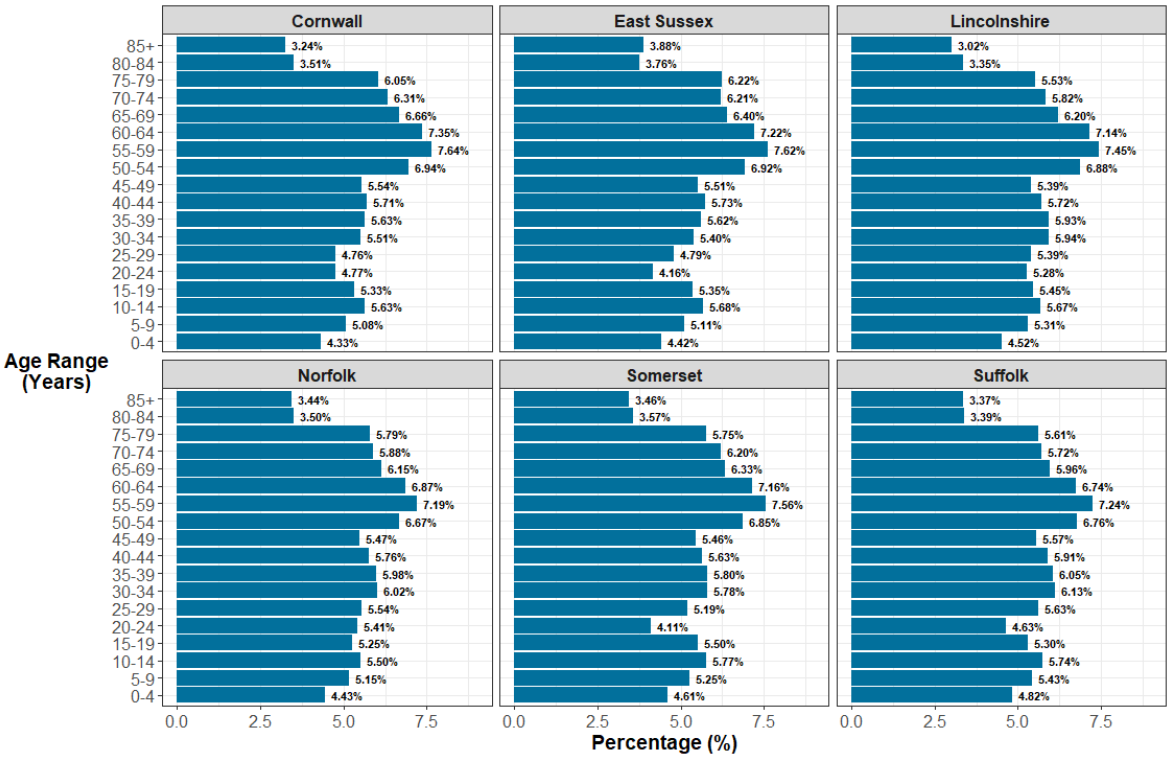
The age group representing the largest proportion of the population within Norfolk is 55-59 years (7.19%), followed by 60-64 years (6.87%).

The age groups 85 plus and 80-84 years represent the smallest proportion of Norfolk's population (3.44% and 3.50% respectively).

Norfolk has the lowest proportion of people aged 10-14 years (5.50%) and 15-19 years (5.25%) compared to its statistical neighbours.

Norfolk has the highest proportion of people aged 20-24 years (5.41%) in comparison with its statistical neighbours.

Figure 5: Percentage of the population by age, Norfolk and statistical neighbours



Source: [Nomis Population Dataset, Population estimates - local authority based by single year of age, 2023]

Population by Age - District

Norfolk has an older population than England overall. 24.8% of the Norfolk population are aged 65 and over compared to 18.7% for England.

South Norfolk (17.6%) and Great Yarmouth (17.0%) had the highest proportion of under 15 year olds.

Norwich (69.3%) had the most 15–64 year-olds, more than England overall (64.2%). Norwich was the only Norfolk local authority to have a greater proportion of 15-64 year olds than England.

In North Norfolk, 34.2% of the population was aged 65 or over.

Table 2: Age distribution by district (2023)

Location	Population (2023)	Percentage aged under 15 years	Percentage aged 15 to 64 years	Percentage aged 65 years and over
Breckland	145,081	16.4%	58.2%	25.4%
Broadland	135,565	16.1%	57.9%	25.9%
Great Yarmouth	100,065	17.0%	58.3%	24.6%
King's Lynn and West Norfolk	155,758	16.5%	57.1%	26.4%
North Norfolk	103,228	13.1%	52.7%	34.2%
Norwich	145,591	15.7%	69.3%	15.0%
South Norfolk	146,655	17.6%	57.9%	24.6%
Norfolk	931,943	16.2%	59.1%	24.8%
England	57,690,323	18.5%	62.9%	18.7%

Source: Nomis Population Dataset , Population estimates - local authority based by single year of age, 2023

Population Change

Norfolk has seen an 8.44% increase in population between the 2023 population estimates, compared to 8.63% for England.

In the same period, South Norfolk (+17.8%) and Breckland (+10.74%) saw the largest population changes, while North Norfolk (+1.54%) and Great Yarmouth (+2.71%) saw the smallest changes.

When looking at the change by broad age groups, we can see that South Norfolk's high rate of population growth is consistent across all age groups.

Other areas such as Broadland, Great Yarmouth and North Norfolk have seen very small growth, or in some cases declines, in population in lower age groups compared to Norfolk overall.

Of all the districts, Norwich has seen the smallest percentage change in population for those aged 65 years and older between 2011 and 2023.

Table 3: Population change by age and district (2023)

Location	Population (2023)	Overall percentage change	Aged under 15 years percentage change (2011 vs. 2023)	Aged 15 to 64 years percentage change (2011 vs. 2023)	Aged 65 years and over percentage change (2011 vs. 2023)
Breckland	145,081	10.74%	3.59%	6.12%	29.43%
Broadland	135,565	8.68%	4.86%	3.63%	25.14%
Great Yarmouth	100,065	2.71%	-1.94%	-1.79%	19.62%
King's Lynn and West Norfolk	155,758	5.29%	3.98%	-0.11%	20.33%
North Norfolk	103,228	1.54%	-7.52%	-5.54%	19.90%
Norwich	145,591	10.16%	5.55%	10.78%	12.44%
South Norfolk	146,655	17.80%	15.49%	12.64%	34.21%
Norfolk	931,943	8.44%	4.18%	4.28%	23.47%
England	57,690,323	8.63%	6.16%	5.57%	23.52%

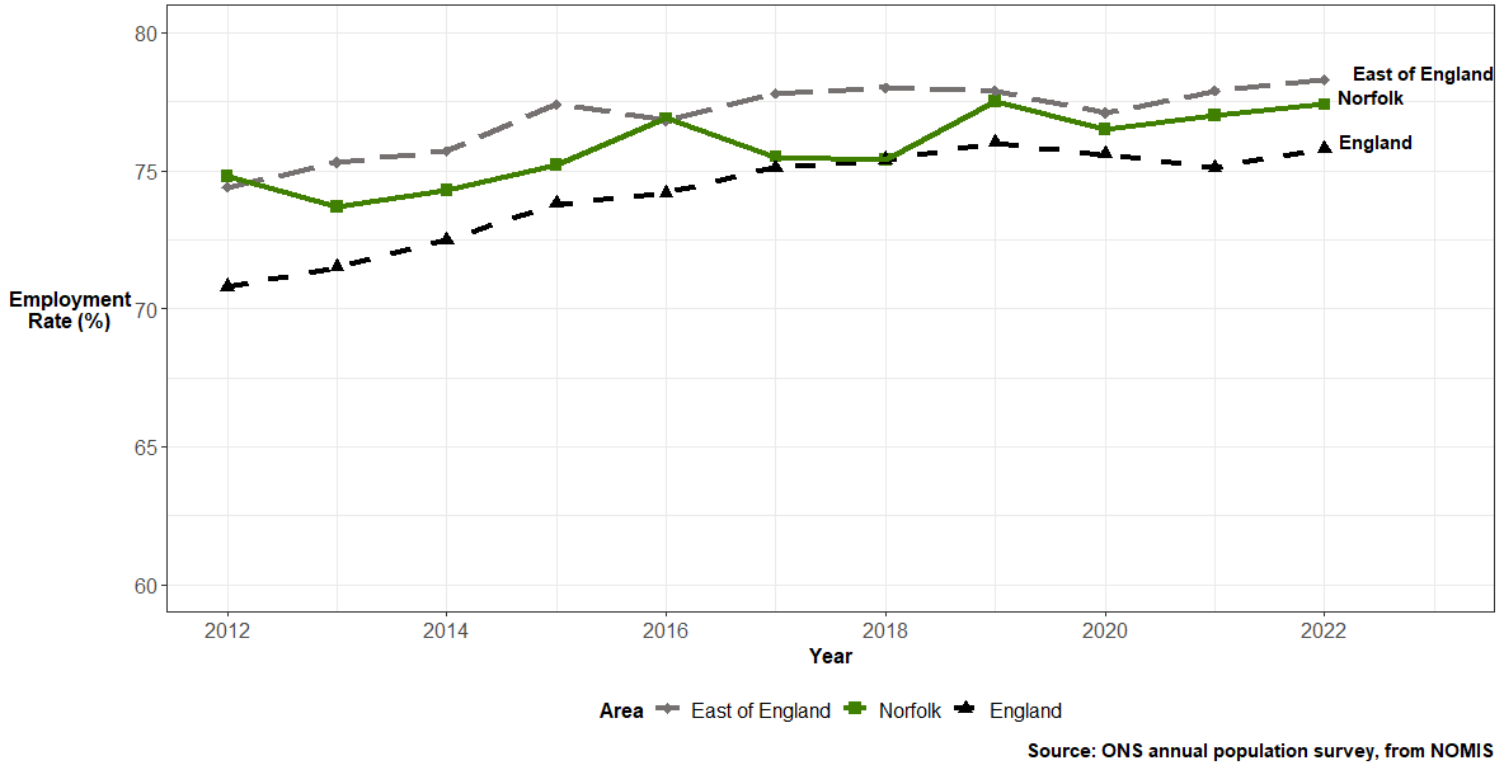
Source: Nomis Population Dataset , Population estimates - local authority based by single year of age, 2011 and 2023

Employment Rate

In Figure 6, the latest data from 2022 puts Norfolk at 77.4% in employment compared to 78.3% in the East of England and 75.8% in England. Additionally, all areas are undergoing an overall increasing trend in employment rates after a relative dip in 2020/21, likely due to the Covid-19 pandemic.

Historically and presently, Norfolk's employment rate tends to lie between the regional (East of England) and national rates.

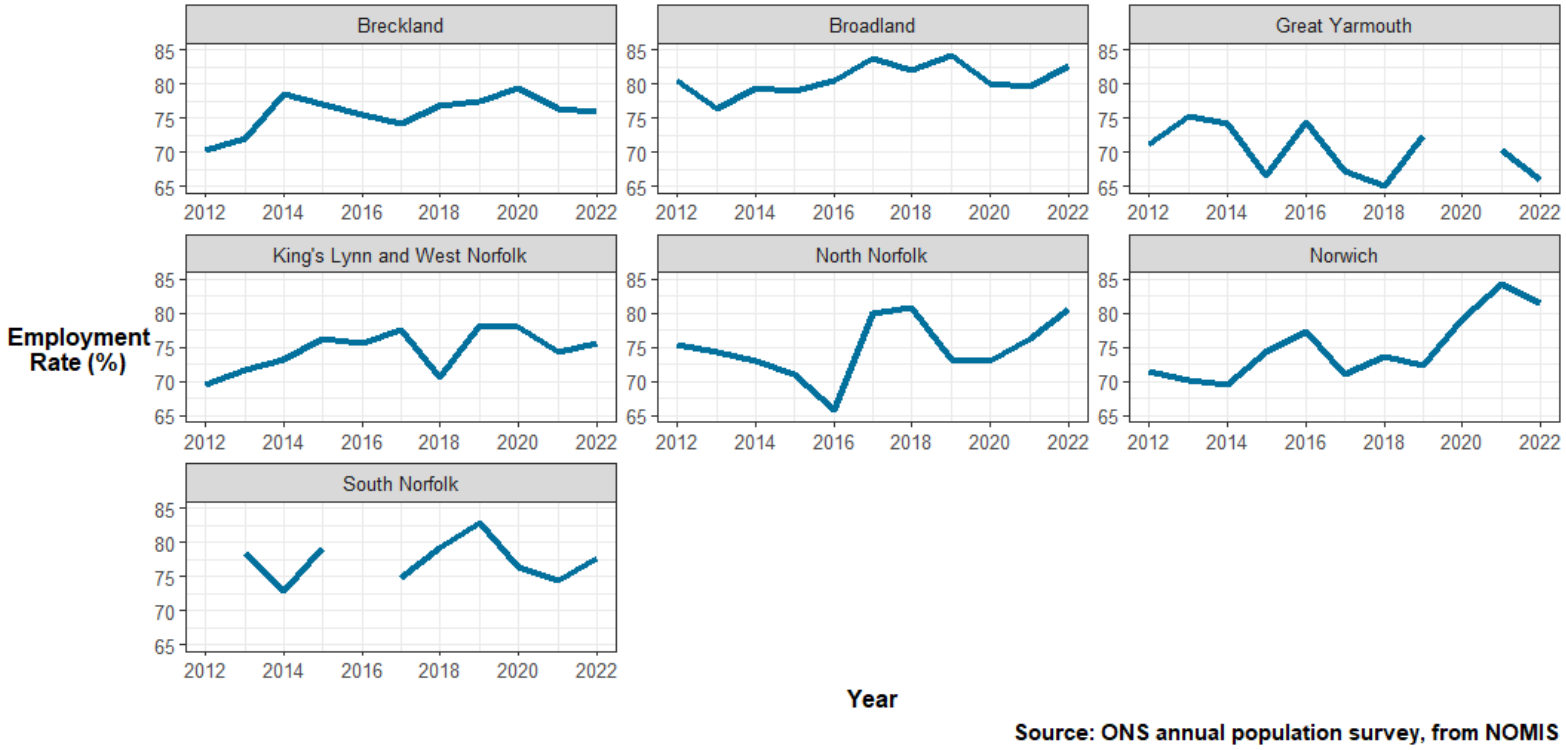
Figure 6: Percentage of people in employment in Norfolk, East of England, and England (2012-2022)



Source: [Norfolk Population Overview August 2023, Norfolk Insight]

Figure 7 below shows the percentage of people in employment for each district in Norfolk. Most districts are on an upward or constant trend, with Great Yarmouth being the exception. Great Yarmouth, with an employment rate of 65.9% in 2022, is experiencing a fluctuating but gradual decline in employment. South Norfolk is also experiencing variable rates through the displayed years but is currently at a local increase to 77.7% employment.

Figure 7: Percentage of people in employment by Norfolk district (2012-2022)



Source: [Norfolk Population Overview August 2023, Norfolk Insight]

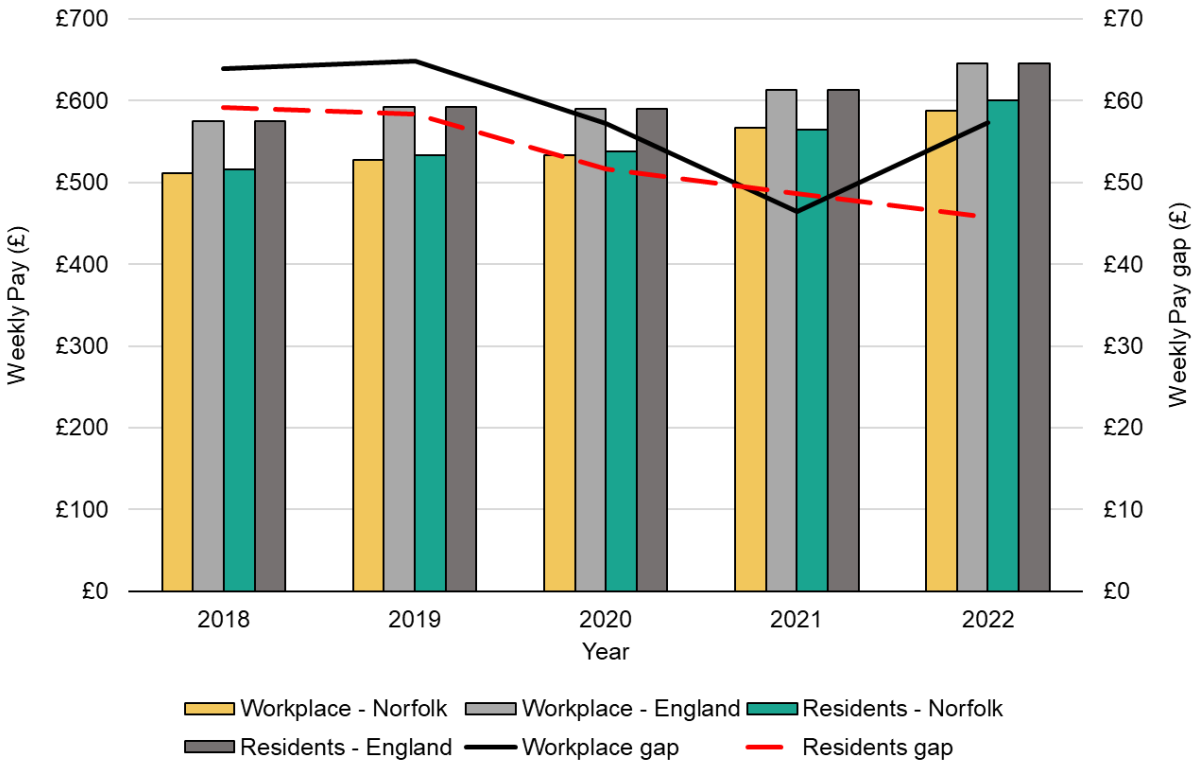
Gross Median Weekly Pay

Norfolk's gross median weekly pay is consistently below England's. To bring Norfolk in line with England, the gross median weekly pay would need to increase by £57 (workplace – i.e. people who work in Norfolk) or £46 (residents – i.e. people who live in Norfolk).

However, workplace gross weekly median pay in Norfolk has increased 15% between 2018 and 2022, compared to an 12% increase for England overall.

This is also true for residents' gross median weekly pay, which has seen a 16% increase (in comparison to 12% for the UK overall).

Figure 8: Gross median weekly pay (£) in Norfolk and England (2018-2022)



Source: Annual Survey of Hours and Earnings, Nomis - accessed November 2023

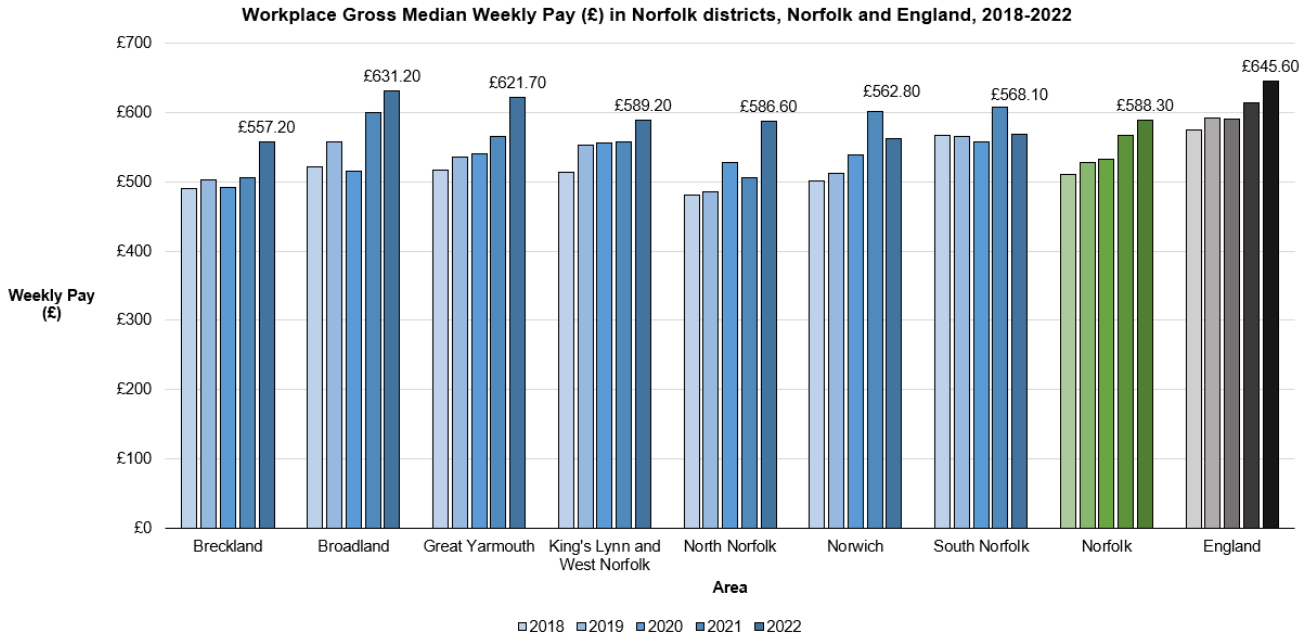
Gross Median Weekly Pay (Workplace) by District

As a place to work, in 2022, Broadland (£631.20) and Great Yarmouth (£621.70) had the highest gross median weekly pay, with Breckland (£557.20) and Norwich (£562.80) reporting the lowest.

Among the districts, only Broadland, Great Yarmouth, and King's Lynn and West Norfolk were above the Norfolk median.

None of the districts were as high as, or above the England median. Breckland's gross median weekly pay was 13.69% lower than England, which was the lowest level of gross median pay in Norfolk, see Figure 9 below.

Figure 9: Workplace gross median weekly pay (£) in Norfolk's districts, Norfolk, and England (2018-2022)



Source: Survey of Hours and Earnings, Nomis - accessed February 2022

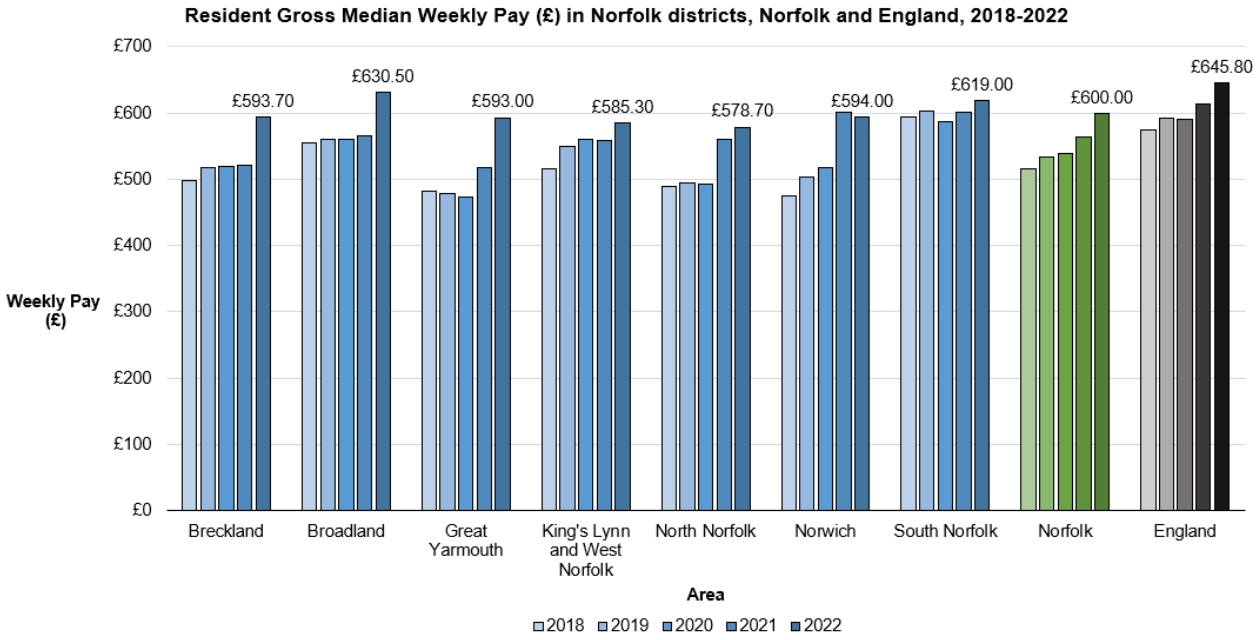
Gross Median Weekly Pay (Residents) by District

In 2022 Broadland (£630.50) and South Norfolk (£619.00) had the highest resident gross median weekly pay, with North Norfolk (£578.70) and King's Lynn and West Norfolk (£585.30) having the lowest.

Broadland and South Norfolk were above the Norfolk median, with South Norfolk 3.17% higher than Norfolk overall.

Again, no Norfolk districts reached the national level. England's overall gross median weekly pay was 11.5% higher than North Norfolk (Norfolk's lowest district for resident's weekly pay), see Figure 10 below.

Figure 10: Resident gross median weekly pay (£) in Norfolk districts, Norfolk and England (2018-2022)



Source: Annual Survey of Hours and Earnings, Nomis - accessed February 2022

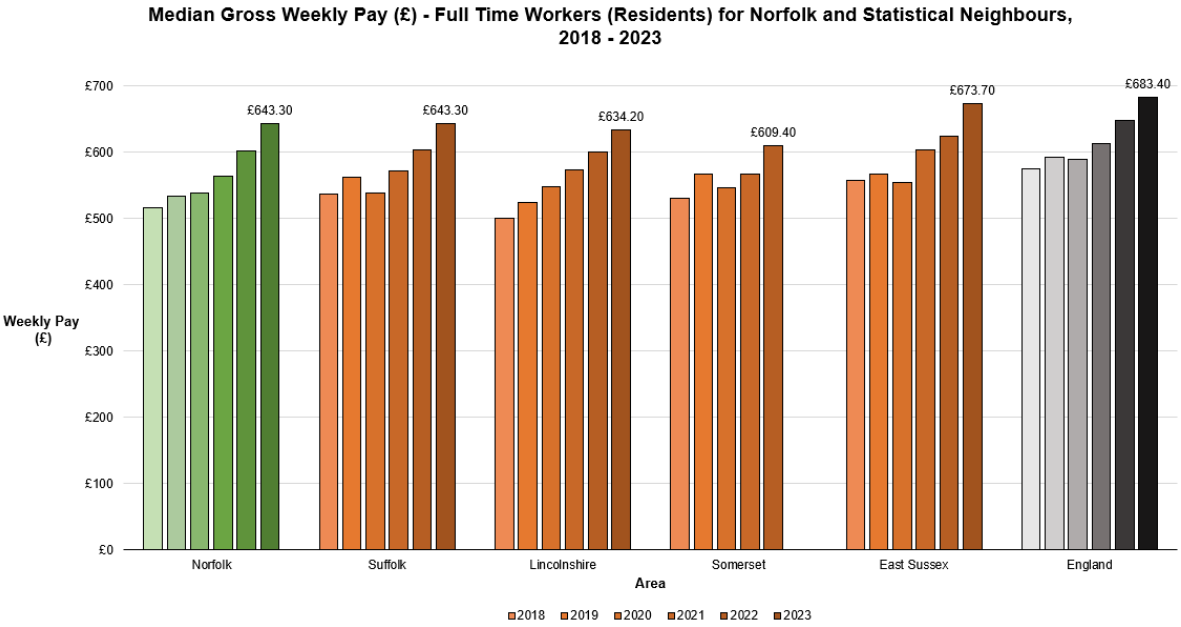
Pay (Residents) – Statistical Neighbours

In 2023, the resident full-time workers' median gross weekly pay in Norfolk (£643.30) was 5.87% less than the level for England (£683.40).

Among the statistical neighbours, East Sussex (£673.70) had the highest median gross weekly pay, which was 4.73% more than Norfolk.

The area with a higher median gross weekly pay (residents) than Norfolk was East Sussex (£673.70), whilst Suffolk was on par with Norfolk at £643.30. See Figure 11 below.

Figure 11: Median Gross Weekly Pay (£) full-time workers (residents) for Norfolk and statistical neighbours (2018-2023)



Source: Annual Survey of Hours and Earning, Nomis - accessed March 2024

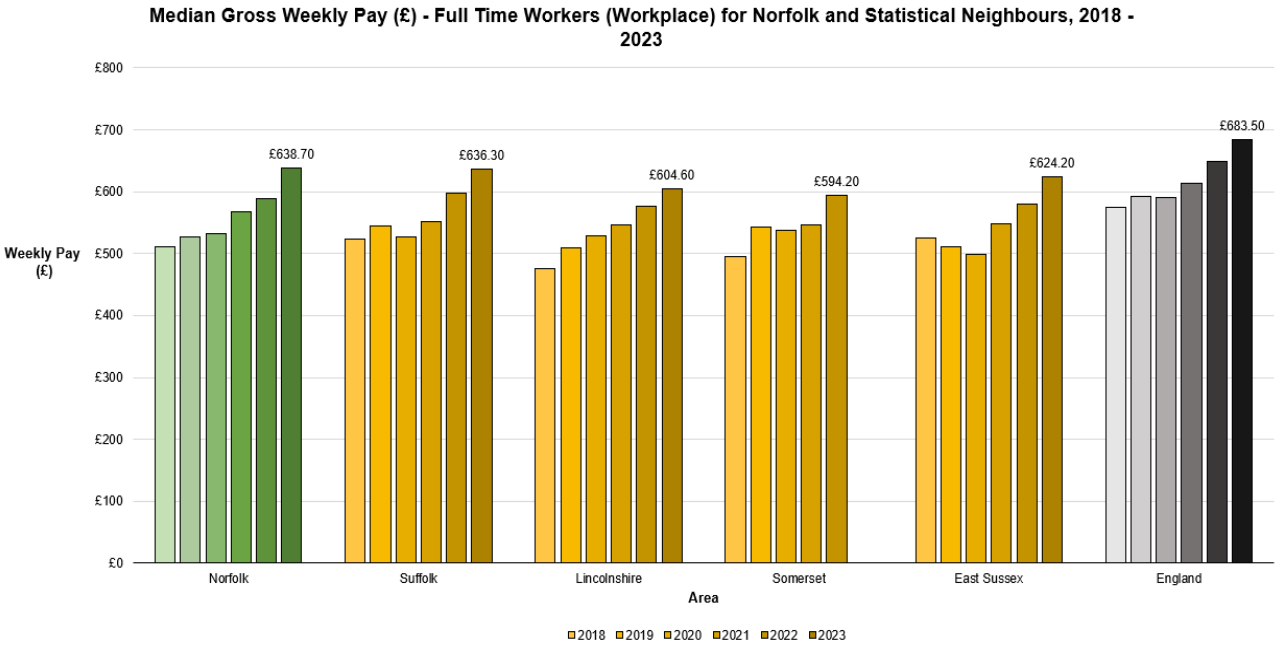
Pay (Workplace) – Statistical Neighbours

In 2023, Norfolk had the highest median gross weekly pay (workplace) among its statistical neighbours (£638.70).

The median gross weekly pay (workplace) of Norfolk was 6.55% less than the national level (£683.50).

The median gross weekly pay (workplace) of Norfolk increased by 8.42% from the year 2022 to 2023. The average weekly pay at workplace in Norfolk has demonstrated steady growth between 2014 and 2023. See Figure 12 below.

Figure 12: Median Gross Weekly Pay (£) - full time workers (workplace) for Norfolk and statistical neighbours.



Source: Annual Survey of Hours and Earnings, Nomis, accessed March 2024

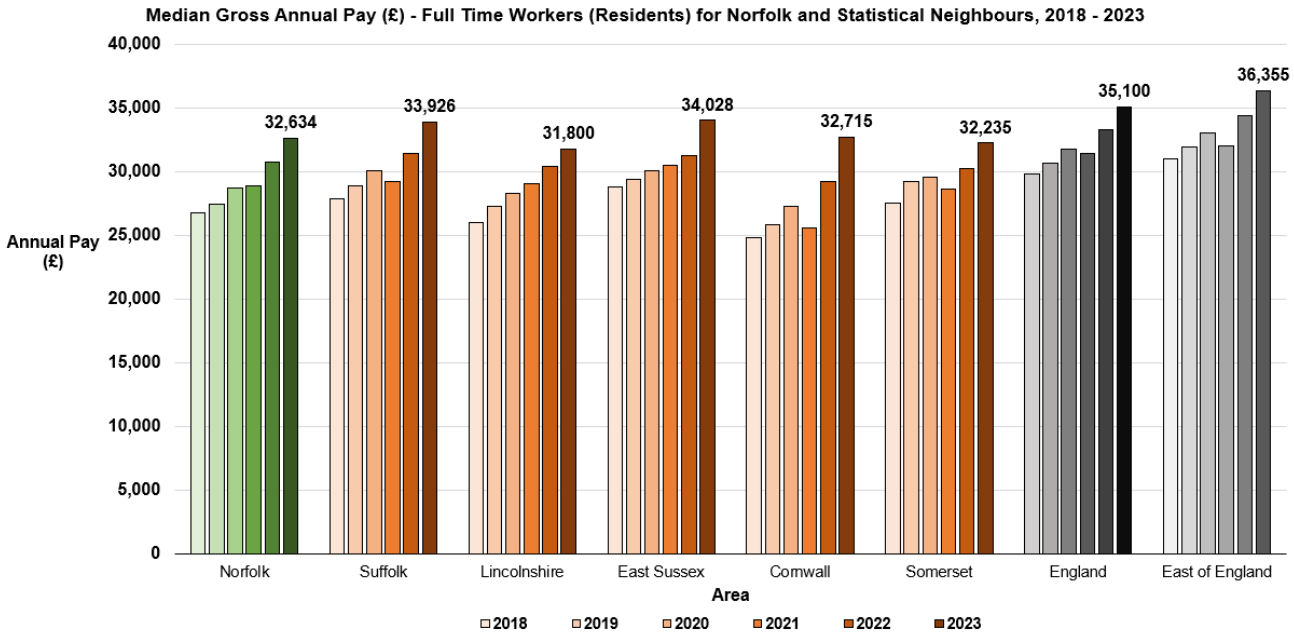
Annual Pay (residents) – Statistical Neighbours

In 2023, the annual median gross pay (residents) in Norfolk (£32,634) was 7% less than the national figures (£35,100).

The annual median gross pay (residents) in Norfolk was 10.2% less than the East of England (£36,355).

The annual median gross pay of Norfolk increased by 5.24% from the year 2022 to 2023. The average annual pay of residents in Norfolk has demonstrated steady growth between 2014 and 2023. See Figure 13 below.

Figure 13: Median gross annual pay (£) - Full time workers (residents) for Norfolk and Statistical neighbours, 2018-2023



Source: annual population survey, NOMIS

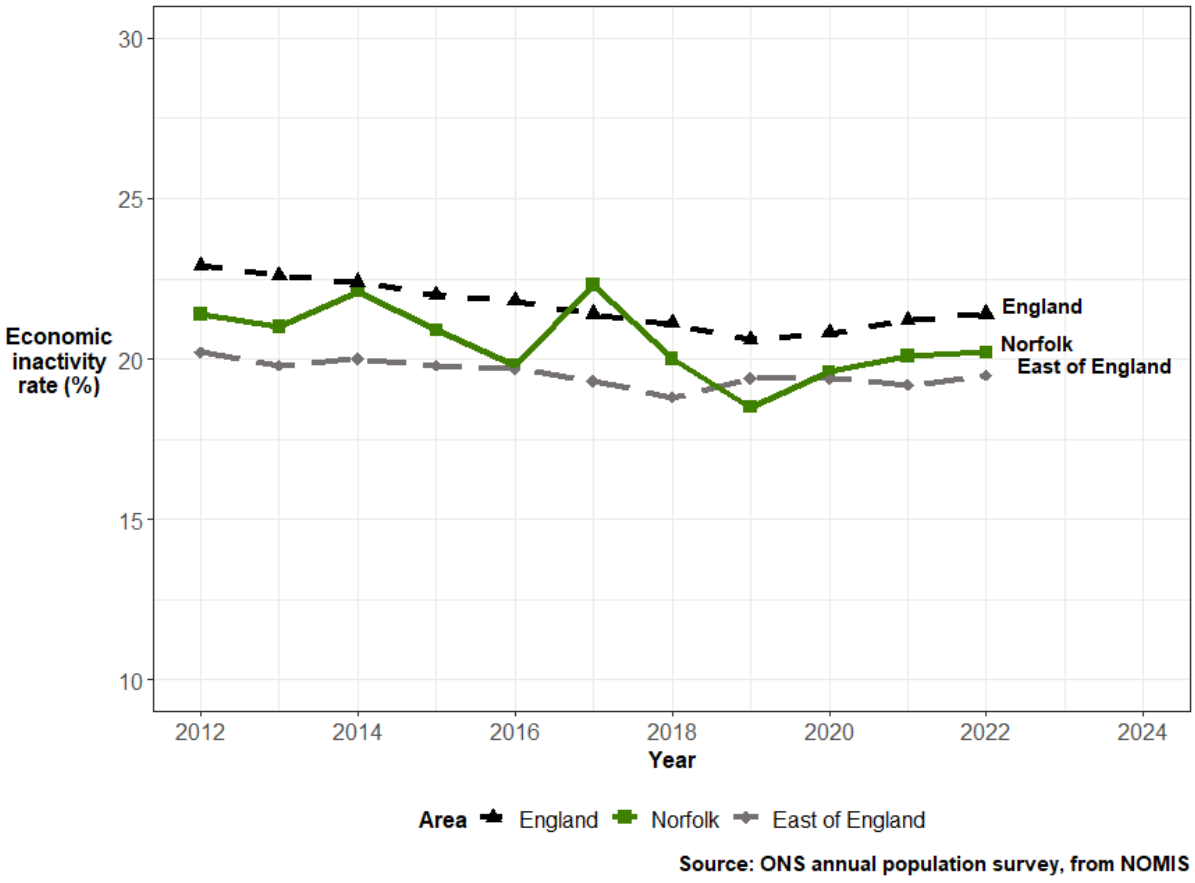
Economic Inactivity

Economic inactivity is a measure of those individuals that are unemployed and have not sought work within the past four weeks and/or are unable to start work within the next two weeks. In recent years Norfolk has seen lower levels of economic inactivity than England, but higher levels when compared to the East of England.

Figure 14 below shows the percentage of economically inactive persons in Norfolk, the East of England, and England from 2012 to 2022. In Norfolk, 20.2% of 16-64 year olds were classed as economically inactive in 2022 compared to 19.5% in the East of England and 21.4% in England.

The percentage of working age population in Norfolk rose by 4.76% from 2018 to 2024 and is forecasted to increase by 6.67% from 2024 to 2034.

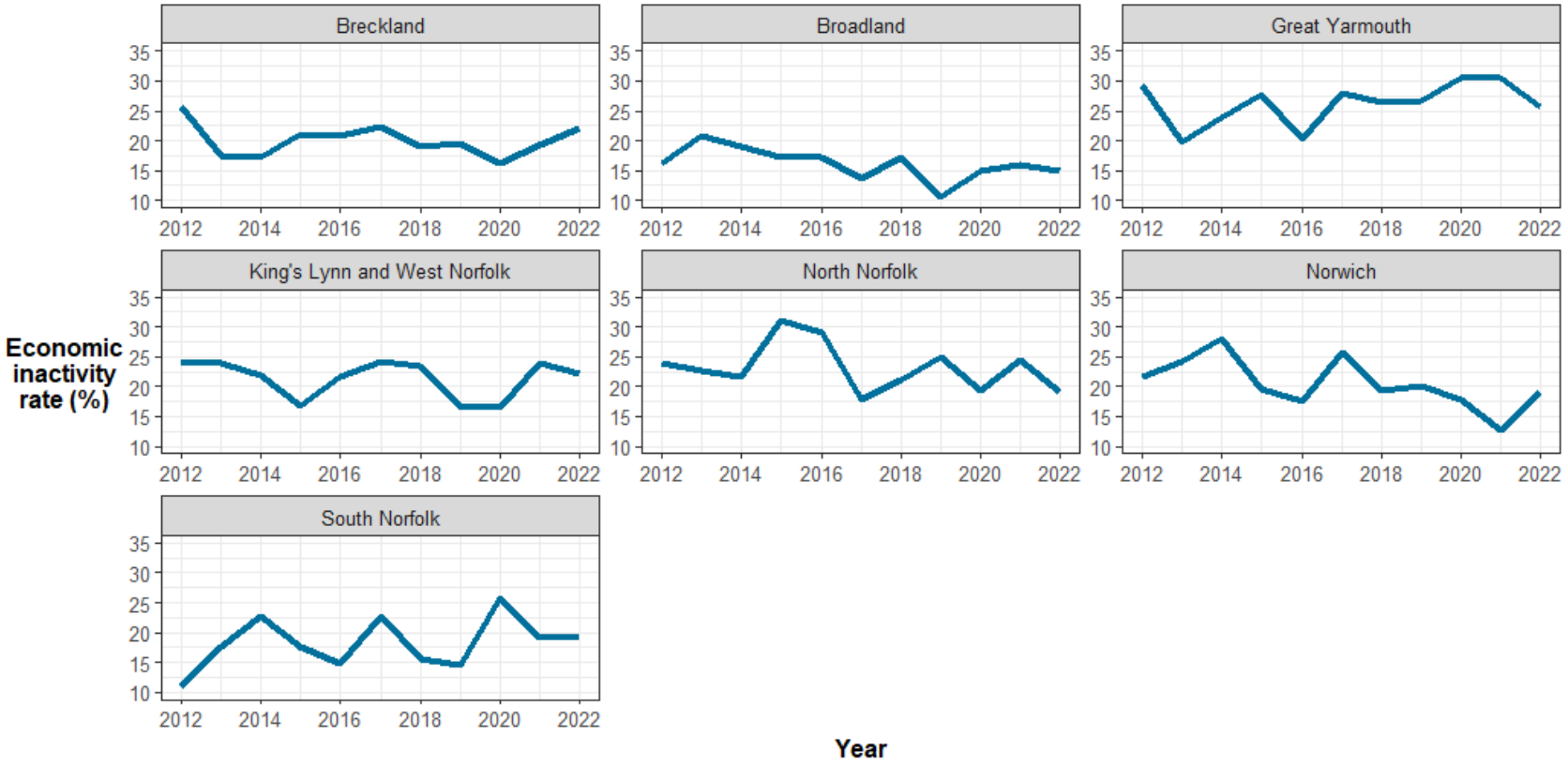
Figure 14: Percentage of economically inactive residents in Norfolk and comparator areas (2012-2022)



Source: Annual population survey – NOMIS, (taken November 2023)

Figure 15 below shows the breakdown of economic inactivity in Norfolk by district over the same period (2012-2022). In 2022, economic inactivity was highest in Great Yarmouth (25.7%) and King's Lynn and West Norfolk (22.1%) and lowest in Broadland (14.8%) and North Norfolk (19.0%).

Figure 15: Percentage of economically inactive residents by Norfolk district (2012-2022)



Source: Annual population survey, NOMIS, (taken November 2023)

Employment, Unemployment, and Economic Inactivity

For more information, the below bullet points contain direct links to the ONS website providing data on employment, unemployment, and economic inactivity for each of Norfolk's districts:

- Breckland
- Broadland
- Great Yarmouth
- King's Lynn and West Norfolk
- North Norfolk
- Norwich
- South Norfolk

Unemployment Rate – Statistical Neighbours

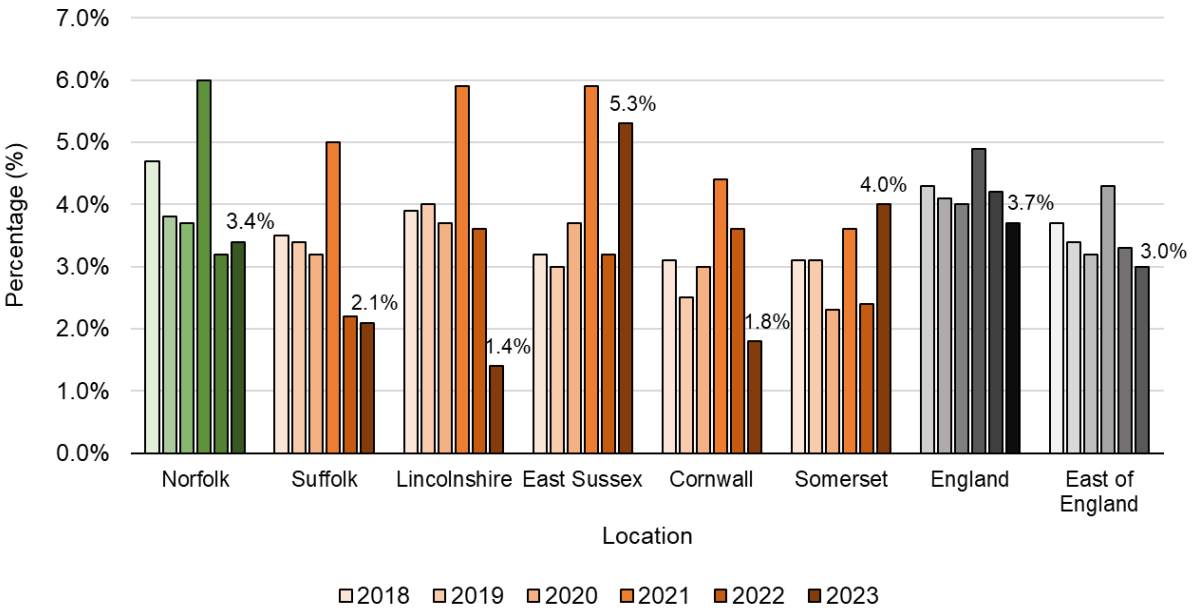
In 2023 Norfolk had an unemployment rate of 3.4% which was also 8.1% less than the national average.

The unemployment rate of Norfolk increased from 3.2% in 2022 to 3.4% in 2023 i.e.; 6.2% increase from 2022.

The unemployment rate of Norfolk is higher than the East of England by 13.3%.

Norfolk has also followed the trend of highest unemployment rate in 2021 in the period between 2018-2023 as a result of the economic impact due to the Covid-19 pandemic.

Figure 16: Unemployment rate - statistical neighbours (2018-2022)



Source: Annual Survey of Hours and Earnings, Nomis, accessed March 2024

Occupational Profile

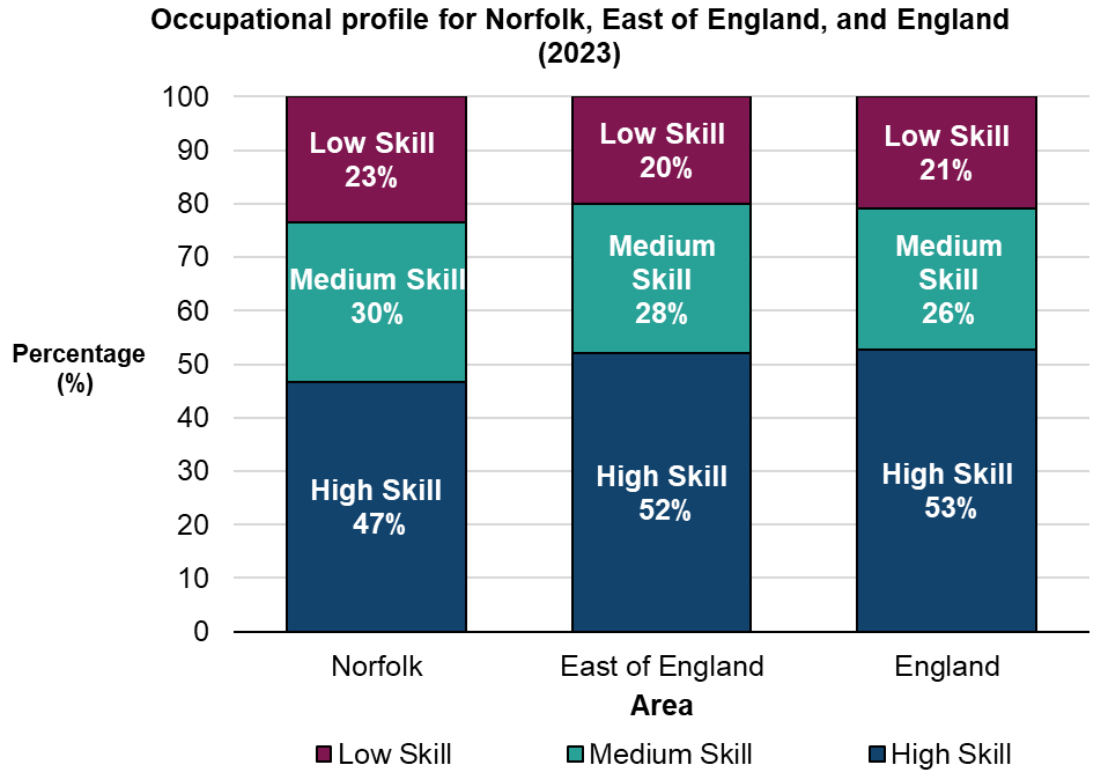
As outlined below in Figure 17, when looking at 'low skill' jobs, Norfolk has a higher proportion of people in this skill band (23%) compared to the East of England (20%) and England (21%).

In terms of 'medium skill' Norfolk again has a higher proportion of people in this skill band (30%) compared to the East of England (28%) and England (26%)

However, for 'high skill' jobs Norfolk has the smallest proportion of people in this band (47%) when contrasted with the East of England (52%) and England (53%)

Therefore, a greater proportion of people in Norfolk are employed in 'low skill' and 'medium skill' jobs compared its regional and National comparators.

Figure 17: Occupational profile for Norfolk, East of England, and England (2023)



Source: Annual Population Survey, Nomis, accessed November 2023

Figure 18 shows the occupations within the low, medium, and high skill levels. The skill levels are split by Standard Occupational Classification (SOC) codes. A breakdown of what is required for each skill level is below.

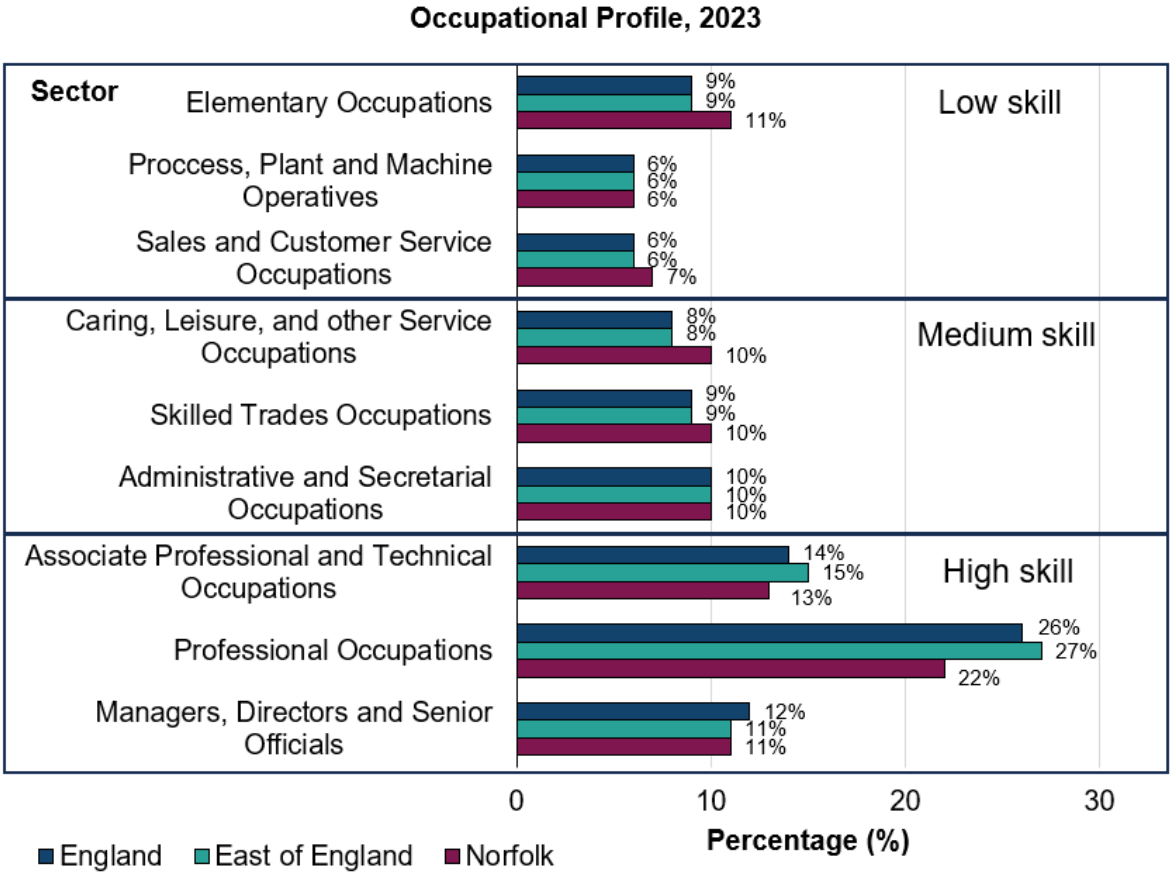
- High skill (SOC 1-3): these roles mostly require graduate level education to access.
- Medium skill (SOC 4-6): mostly require Level 3-5 qualification.
- Low skill (SOC 7-9): mostly require Level 2 qualification or below.

Within the high skill level, ‘Professional Occupations’ has the highest proportion for Norfolk, East of England and England.

More (or the same) percentage of people work in lower and medium skilled jobs compared to East of England and England.

The percentage of residents in Norfolk working in high skill jobs is less compared to East of England and England.

Figure 18: Occupational profile (2023)



Source: Annual Population Survey, Nomis, accessed November 2023

Vacancies

For the 12-month period April 2023 to March 2024, across all industry sectors there were around 19,300 (25.8%) more unique vacancy posting for Norfolk jobs, compared with the previous 12-month period.

Over the last year, highest proportional increases in job vacancy postings have been for Construction (increase of 69.2%); Transportation and Storage (64.0%); Arts, Entertainment and Recreation (55.5%); Public Administration and Defence (55.4%); Manufacturing (55.1%); Wholesale and Retail Trade (49.7%); and Real Estate Activities (49.0%).

Table 4: Vacancies by industry

Industry (SOC 1 digit)	Unique Postings (Apr 2022 - Mar 2023)	Unique Postings (Apr 2023 - Mar 2024)	Number change from 2022/23 to 2023/24	Percentage change from 2022/23 to 2023/24
Construction	1,247	2,110	863	69.2
Transportation and Storage	800	1,312	512	64.0
Arts, Entertainment and Recreation	548	852	304	55.5
Public Administration and Defence; Compulsory Social Security	1,621	2,519	898	55.4
Manufacturing	2,060	3,196	1,136	55.1
Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	3,679	5,506	1,827	49.7
Real Estate Activities	1,229	1,831	602	49.0
Accommodation and Food Service Activities	3,382	4,754	1,372	40.6
Other Service Activities	2,055	2,840	785	38.2
Agriculture, Forestry and Fishing	308	411	103	33.4
Professional, Scientific and Technical Activities	5,715	7,537	1,822	31.9
Administrative and Support Service Activities	31,137	38,835	7,698	24.7
Education	3,016	3,753	737	24.4
Water Supply; Sewerage, Waste Management and Remediation Activities	398	482	84	21.1
Information and Communication	1,939	2,193	254	13.1

Industry (SOC 1 digit)	Unique Postings (Apr 2022 - Mar 2023)	Unique Postings (Apr 2023 - Mar 2024)	Number change from 2022/23 to 2023/24	Percentage change from 2022/23 to 2023/24
Human Health and Social Work Activities	13,804	14,305	501	3.6
Financial and Insurance Activities	1,609	1,538	-71	-4.4
Electricity, Gas, Steam and Air Conditioning Supply	101	88	-13	-12.9
Mining and Quarrying	234	104	-130	-55.6
Total across all industries	**74,882**	**94,166**	**19,284**	**25.8**

Source: Lightcast labour market analytics – unique job postings data

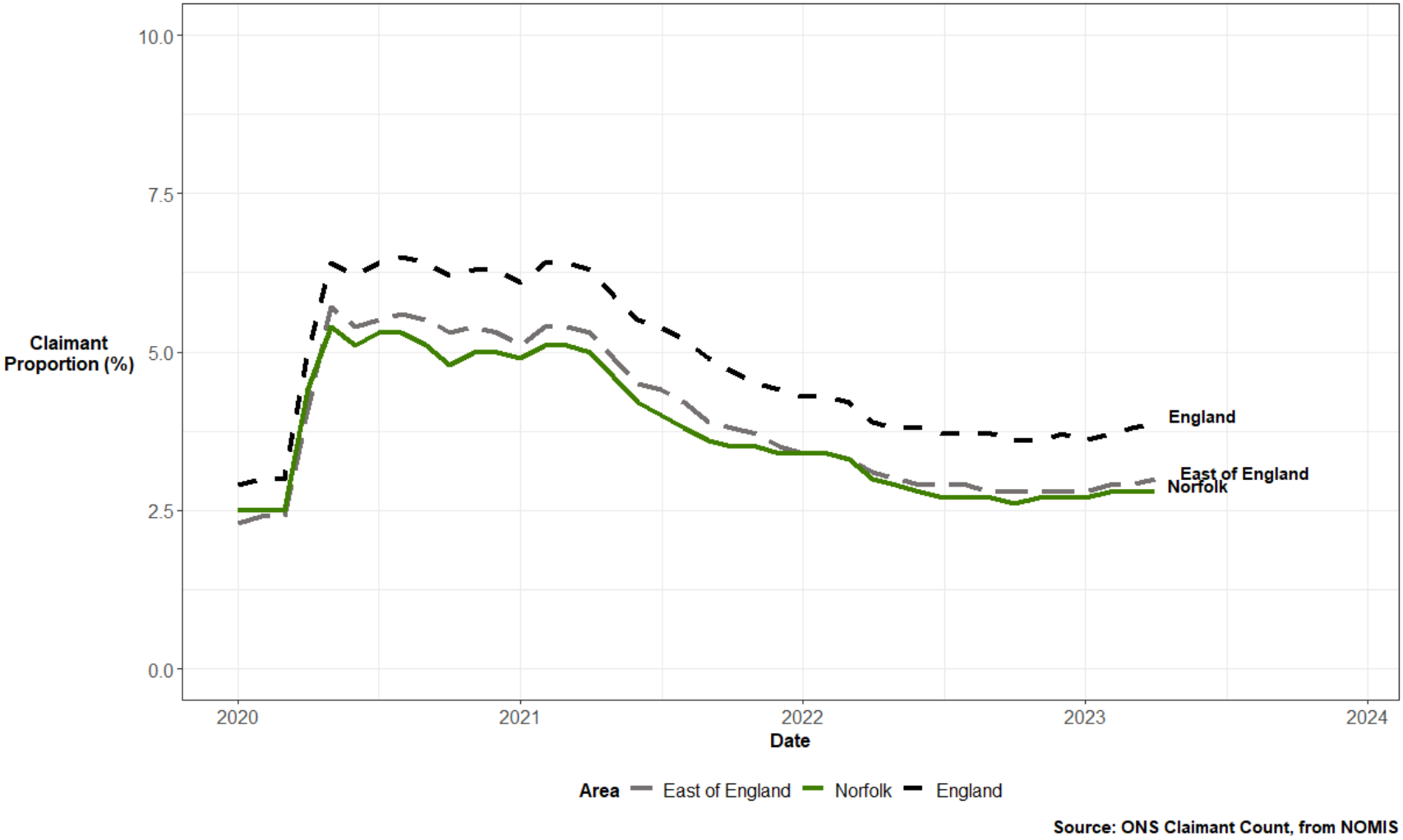
Note: The unique posting count is the count of postings after the deduplication process has taken place. Deduplication is the process of identifying duplicate job postings and only counting one of the duplicates.

Claimant Count

Figure 19 shows a sharp increase in the percentage of residents aged 16-64 who are claiming either Job Seekers Allowance (JSA) or Universal Credit (UC) in all areas at the beginning of the Covid-19 pandemic. These increased rates continue until early/mid-2021 where they started declining. After a period of relatively constant proportions, all areas increased slightly in 2023.

Both Norfolk and the East of England have remained below the England average for the entire period. Norfolk's claimant rate as of April 2023 was 2.8% compared to 3.9% nationally and 3% regionally.

Figure 19: Proportion of residents aged 16-64 claiming JSA and UC in Norfolk, East of England, and England (January 2020 to April 2023)

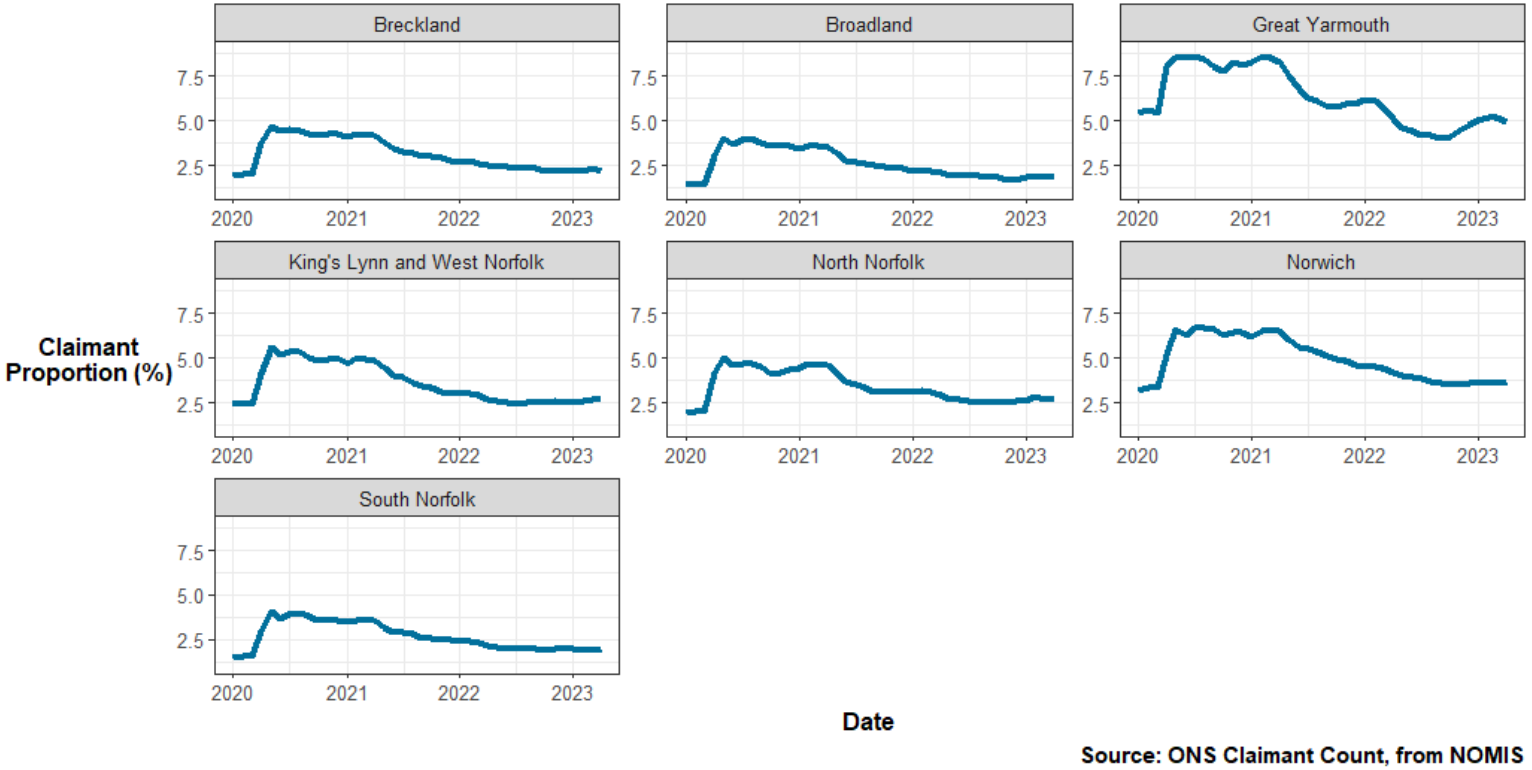


Source: [Norfolk Population Overview August 2023 (norfolkinsight.org.uk)]

Figure 20 shows the same metric for the districts within Norfolk. Great Yarmouth and Norwich had sustained higher claimant proportions throughout the entire period. Moreover, while all districts display the same profile, although to varying degrees of amplitude, Great Yarmouth shows much more variable and volatile claimant proportions. For example, all districts have seen a gradual decline and levelling off in claimant percentage since early/mid-2021, while Great Yarmouth has seen two separate peaks around January of both 2022 and 2023.

Great Yarmouth also has the highest claimant proportion as of April 2023 at 4.9% with Norwich the next highest at 3.7%.

Figure 20: Proportion of residents aged 16-64 claiming JSA and UC by Norfolk district (January 2020 to April 2023)



Source: Norfolk Population Overview August 2023 (norfolkinsight.org.uk)

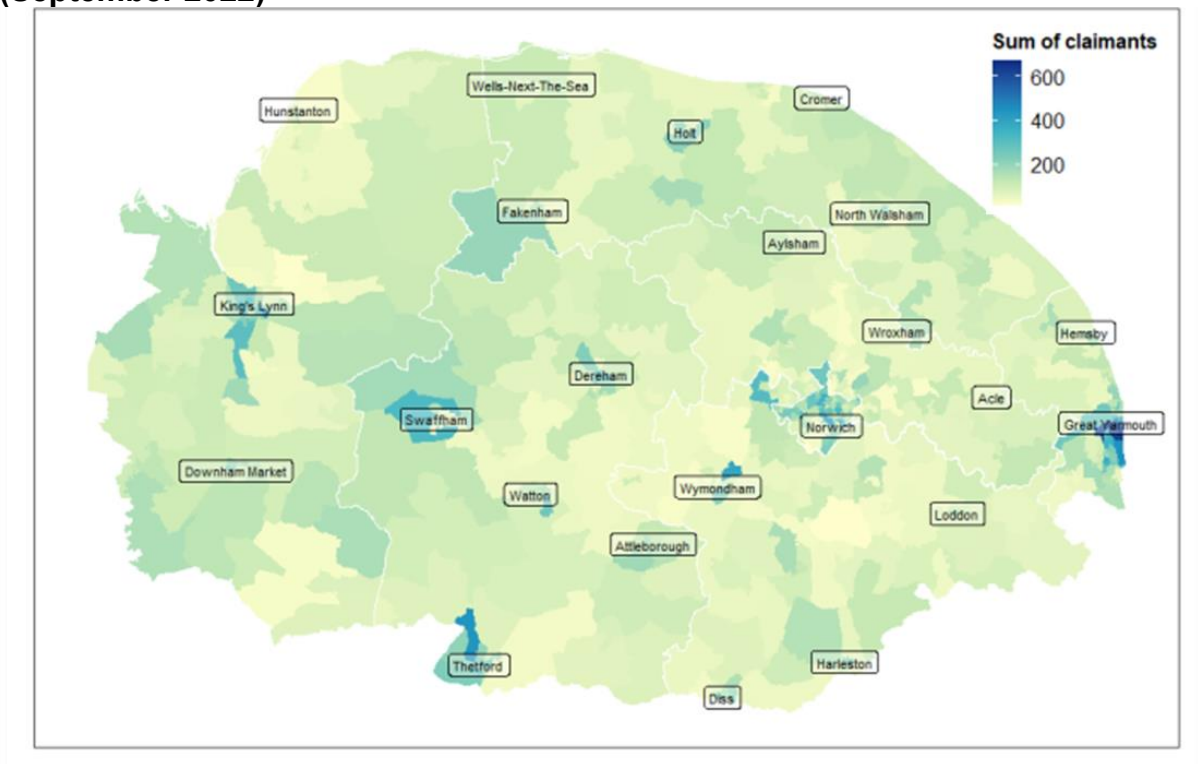
Figure 21 shows a Lower Super Layer Output area (LSOA) map of individuals receiving UC for Norfolk in September 2022, with areas shaded in blue representing areas with a greater than average number.

A light green shaded LSOA represents one with the mean average number of UC recipients of all LSOAs, which in September 2022 was 127.

Areas shaded light yellow are those with lower-than-average numbers of UC recipients. This illustrates areas with the most UC claimants and helps to give a picture of the levels of hardship being experienced across the county.

As shown, the larger urban centres of Norwich, Kings Lynn, Thetford, and Great Yarmouth continue to have high number of UC claimants, however there are also hotspots around the smaller towns of Holt, Fakenham, Dereham, Swaffham and Wymondham.

Figure 21: Total individuals on Universal Credit per LSOA in Norfolk (September 2022)



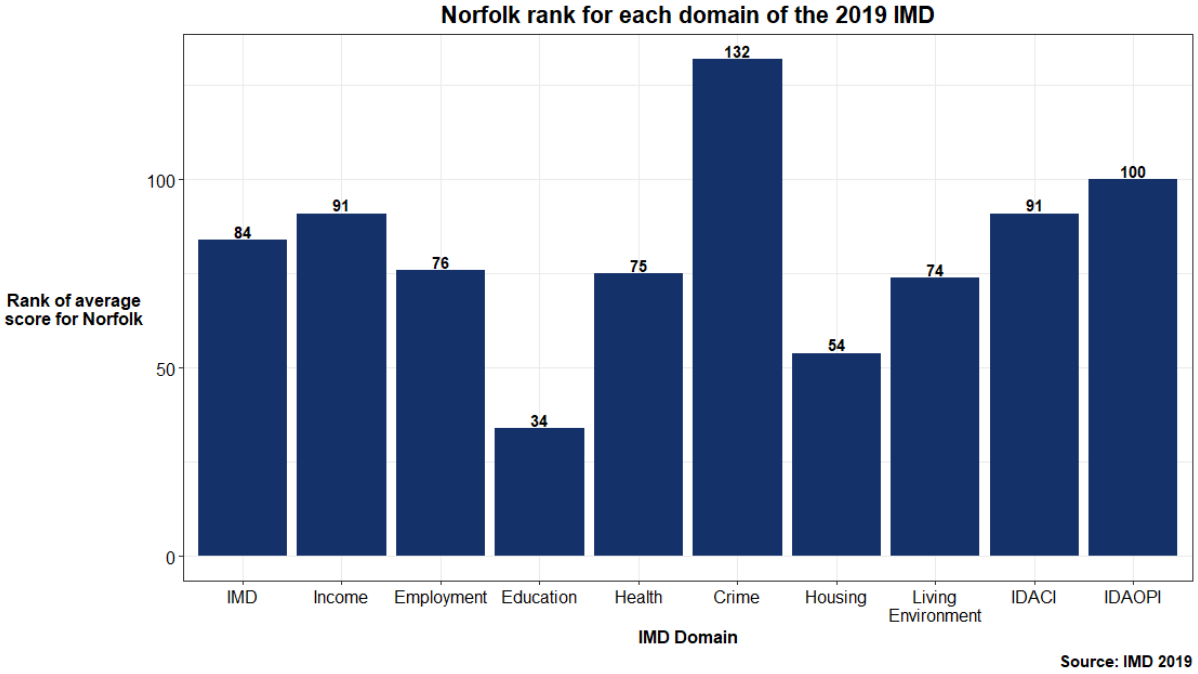
Source: Stat-Xplore, People on Universal Credit

Deprivation

The 2019 Index of Multiple Deprivation (IMD) release is still the most up to date release of deprivation data. Norfolk is ranked as the 84th most relatively deprived upper tier local authority out of 151 in total.

Figure 22 shows that Norfolk is relatively least deprived within the 'Crime' domain, at a rank of 132nd out of 151 upper tier local authorities. The domain in which Norfolk was relatively most deprived was 'Education, Skills and Training' with a rank of 34, second was 'Barriers to Housing and Services' with a rank of 54.

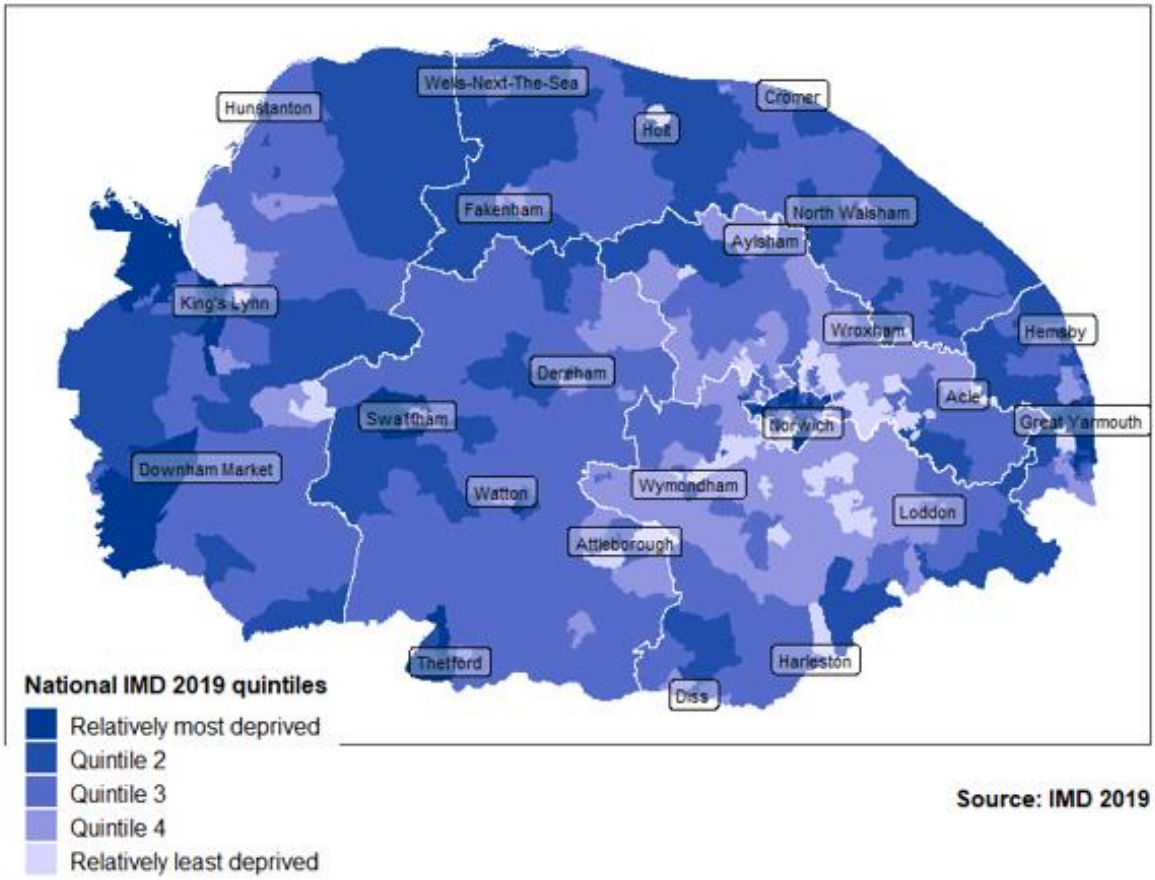
Figure 22: Norfolk's rank across all the domains of the 2019 IMD cased on the rank of average score measures.



Source: IMD 2019 Report V2 (002)

Figure 23 shows the quintiles of deprivation according to the 2019 IMD publication, (Ministry of Housing, Communities & Local Government, 2019) at LSOA level. Areas of less relative deprivation can be seen in South Norfolk and Broadland, whereas areas such as Great Yarmouth, Thetford, King's Lynn, and Norwich have higher rates of relative deprivation. Norwich in particular remains a relatively deprived area, except for the southwest part of the city.

Figure 23: IMD 2019 quintiles at LSOA level within Norfolk



Source: IMD 2019 Report V2 (002)

Population Living in Most Deprived IMD Decile by District

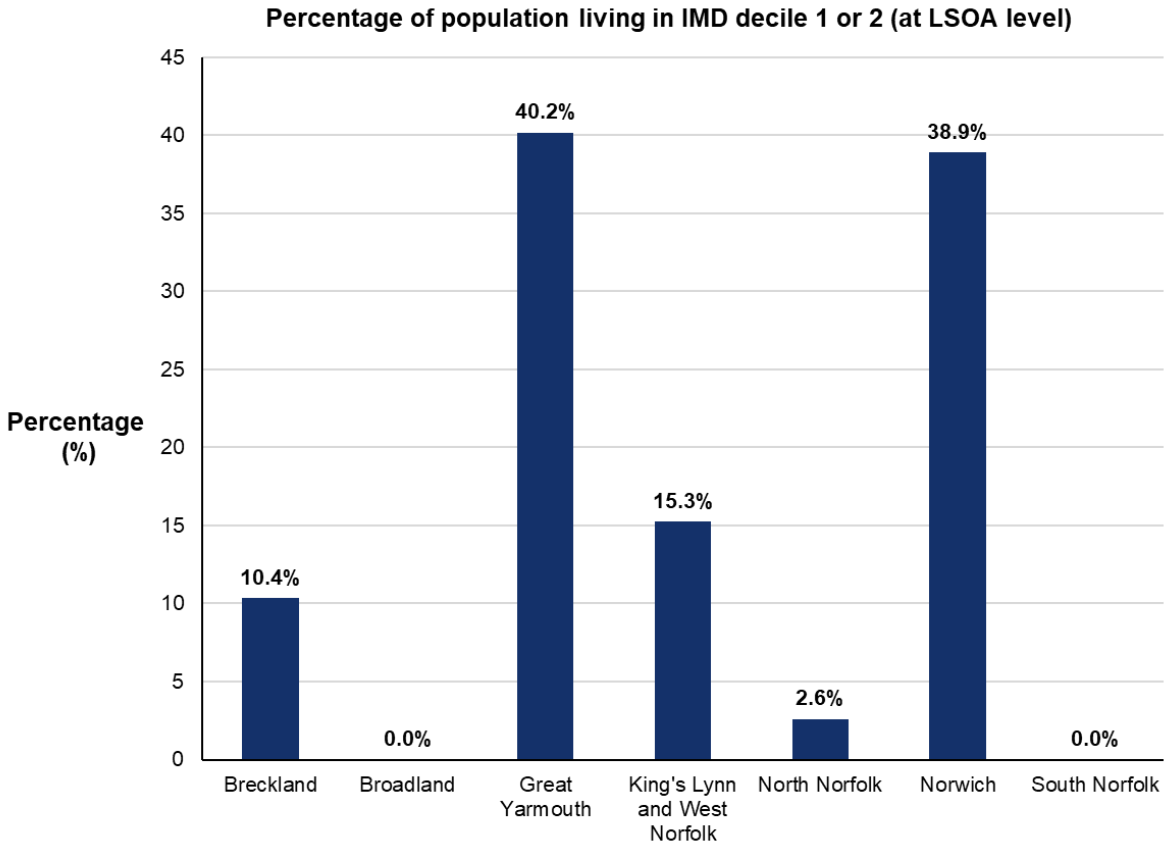
Overall, 14.9% of the Norfolk population (approximately 136,400 residents) live in areas that are in IMD decile 1 or 2 (areas that are in the 20% most deprived areas of England).

The proportions of deprivation are higher in Great Yarmouth and Norwich, where around four in every 10 people live in LSOAs that are classed as the 20% most deprived areas of the country.

This equates to approximately 40,100 and 56,000 residents living in IMD decile 1 or 2 in Great Yarmouth and Norwich, respectively.

None of the LSOAs in Broadland or South Norfolk are in IMD decile 1 or 2 and therefore none of their residents live in the 20% of most deprived areas of England.

Figure 24: Percentage of population living in IMD decile 1 or 2 (at LSOA level)



Source: Mid-2019 Estimates of the population for the UK, England, Wales, Scotland and Northern Ireland - Office for National Statistics and "File 7" from English indices of deprivation 2019

Percentage Population Living in Each IMD Decile by District

Table 5 shows the percentage of the population in each district who live in LSOAs in each IMD decile. These numbers are calculated using 2019 ONS mid-year estimates and the IMD decile of each LSOA. In this dataset the total Norfolk population used is 907,760.

Great Yarmouth has the highest proportion of people living in LSOAs in IMD decile 1 (27.2%) and no residents living in IMD decile 10.

Conversely, South Norfolk has the highest proportion of people living in IMD decile 10, the least deprived 10% of LSOAs, and no residents in IMD decile 1, 2 or 3.

Table 5: Percentage of population living in each IMD decile by Norfolk district

Location	IMD decile 1	IMD decile 2	IMD decile 3	IMD decile 4	IMD decile 5	IMD decile 6	IMD decile 7	IMD decile 8	IMD decile 9	IMD decile 10
Breckland	1.8%	8.6%	10.7%	6.9%	24.5%	21.6%	11.2%	9.9%	4.8%	0.0%
Broadland	0.0%	0.0%	0.0%	4.6%	11.5%	14.8%	16.5%	18.4%	21.8%	12.5%
Great Yarmouth	27.2%	13.0%	13.7%	8.6%	10.6%	15.4%	5.2%	2.6%	3.7%	0.0%
King's Lynn and West Norfolk	7.9%	7.3%	16.2%	17.7%	24.3%	13.2%	4.6%	2.0%	3.9%	2.8%
North Norfolk	0.0%	2.6%	13.9%	25.9%	27.3%	21.1%	5.8%	1.7%	1.9%	0.0%
Norwich	19.4%	19.5%	9.2%	17.6%	2.4%	7.9%	3.5%	7.1%	3.1%	10.3%
South Norfolk	0.0%	0.0%	0.0%	10.1%	10.4%	17.0%	22.3%	17.2%	10.3%	12.7%

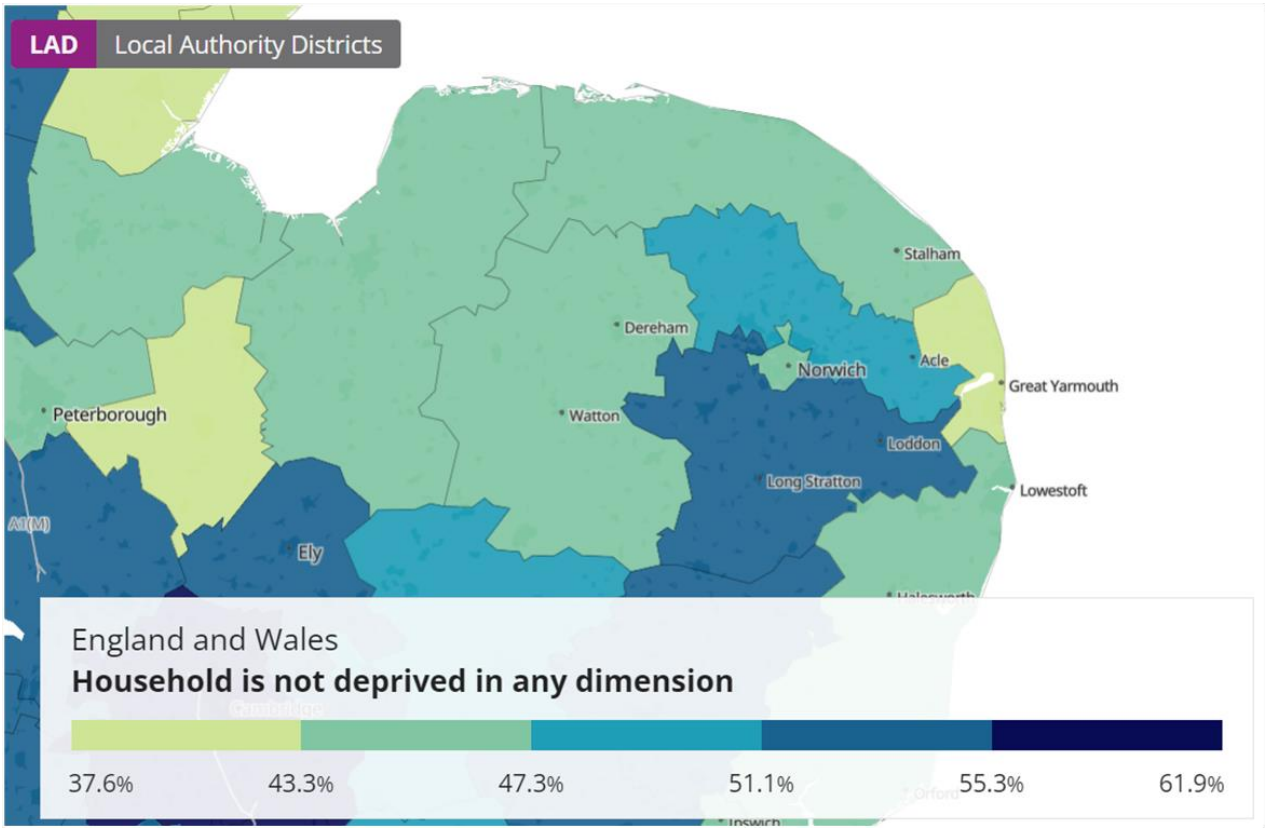
Source: Mid 2019 Estimates of the population for the UK, England, Wales, Scotland and Northern Ireland - Office for National Statistics and "File 7" from English indices of deprivation 2019

Household Deprivation

Figure 25 shows the households not deprived in any dimension. Relative to England as a whole, Broadland and South Norfolk have a lower percentage of households that are classed as ‘deprived in at least one dimension’ while Great Yarmouth has a much higher percentage of households in deprivation (compared to England).

Table 6 shows the percentage of households who have at least one dimension of deprivation. For Norfolk and England’s percentages, this has been calculated using all data from lower tier local authorities.

Figure 25: Percentage of household deprivation in Norfolk



Source: [Build a custom area profile - Census 2021, ONS]

Table 6: Percentage of households who have at least one dimension of deprivation

Location	Percentage of households who have at least one dimension of deprivation
Breckland	54.5%
Broadland	49.0%
Great Yarmouth	61.8%
King's Lynn and West Norfolk	56.0%
North Norfolk	55.6%
Norwich	55.0%
South Norfolk	48.3%
Norfolk	54.1%
England	51.6%

Source: Build a custom area profile - Census 2021, ONS

Norwich's People (comparative perspective)

Norwich is ranked across people-orientated metrics against other comparable cities (Cambridge, Oxford, Peterborough, Colchester, Lincoln, York and Ipswich) as well as the English and wider Norfolk average, see Table 7. The data illustrates challenges relating to health and deprivation and earnings in Norwich.

- **Earnings:** In 2023, Norwich had higher median resident earnings of £33,429 (below the English average of £35,000) in comparison to its median workplace earnings of £31,997 (also below the English average of £35,106). Norwich's average income after housing costs is £2,276 (Norwich average of £27,207 compared to £29,483 for England and Wales) behind the national average.
- **Deprivation:** Norwich is the forty-second most unequal local authority in the country - in the top 20%. 20% of its LSOA's are in the 10% most deprived nationally.

Table 7: Norwich's ranking compared to other cities for population change, percentage of LSOAs in the top 10% most deprived nationally, median resident earning (2023), and median workplace earnings.

Rank	Population change (2015 – 2022)	% of LSOAs in top 10% most deprived nationally	Median resident earnings (2023)	Median workplace earnings (2023)
1	Cambridge 10%	Cambridge 0%	Cambridge £40,914	Cambridge £39,930
2	Peterborough 8.7%	York 0%	Oxford £37,617	Oxford £38,846
3	Colchester 6.1%	Colchester 1%	Colchester £36,125	England National Average £35,106
4	Norwich Urban Area 5.3%	Oxford 1%	England National Average £35,000	York £34,109
5	Norfolk 4.8%	Ipswich 14%	Norwich £33,429	Colchester £33,962
6	Norwich 4.3%	Peterborough 14%	Ipswich £33,346	Lincoln £33,477
7	Oxford 3.2%	Lincoln 18%	Peterborough £32,941	Peterborough £33,425
8	Lincoln 3.1%	Norwich 20%	Norfolk £32,634	Ipswich £33,363
9	York 0.7%	Not Applicable	York £32,251	Norfolk £32,485
10	Ipswich -0.3%	Not Applicable	Lincoln £31,430	Norwich £31,997

Source: Partnering Regeneration Development Ltd (PRD)

Fuel Poverty

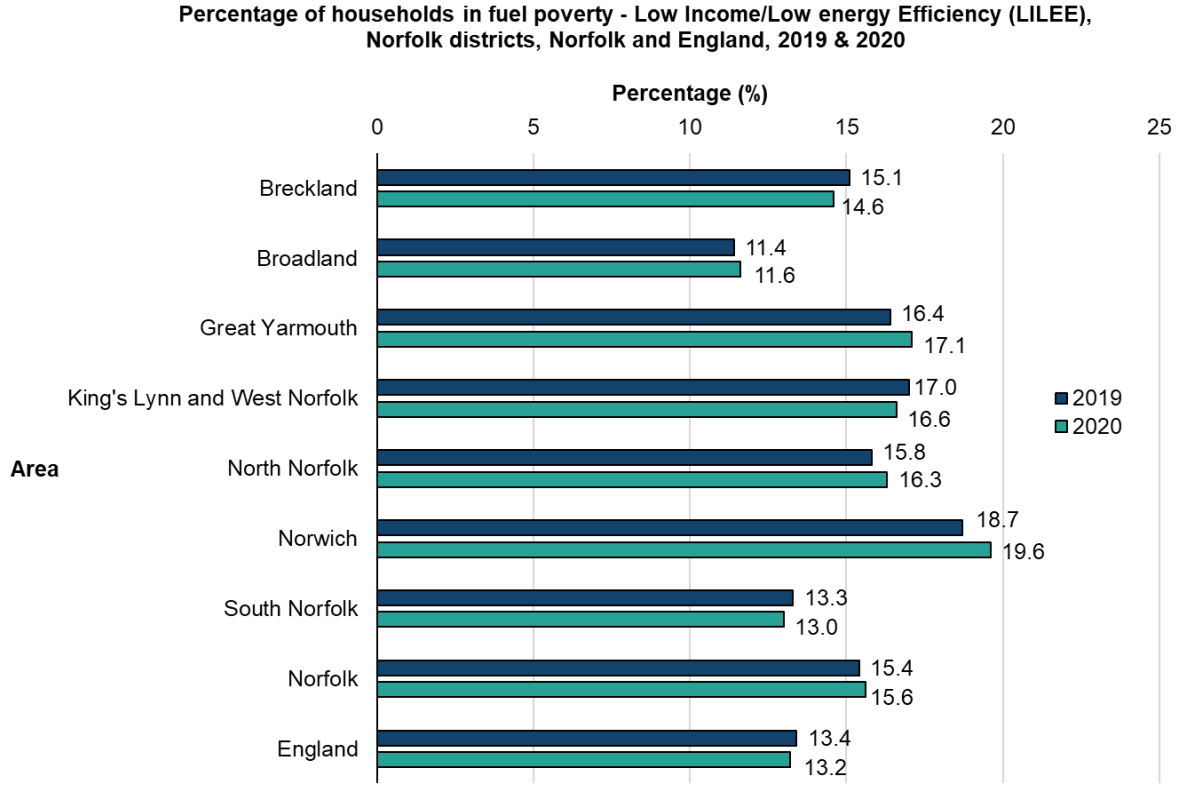
As shown in Figure 26, in 2020, 15.6% of households in Norfolk were classed as in fuel poverty (using the Low Income/Low energy Efficiency or LILEE model), compared to 13.2% in England.

Almost one in every five households in Norwich (19.6%) was classified as in fuel poverty in 2020, the highest proportion of all the Norfolk districts.

This was followed by Great Yarmouth (17.1%), King's Lynn and West Norfolk (16.6%) and North Norfolk (16.3%) which are all higher than Norfolk's proportion.

The lowest percentage of houses in fuel poverty were in Broadland (11.6%) and South Norfolk (13.0%), which are also below England's proportions.

Figure 26: Percentage of households in fuel poverty - Low Income/Low Energy Efficiency (LILEE), Norfolk districts, Norfolk, and England (2019 and 2020)



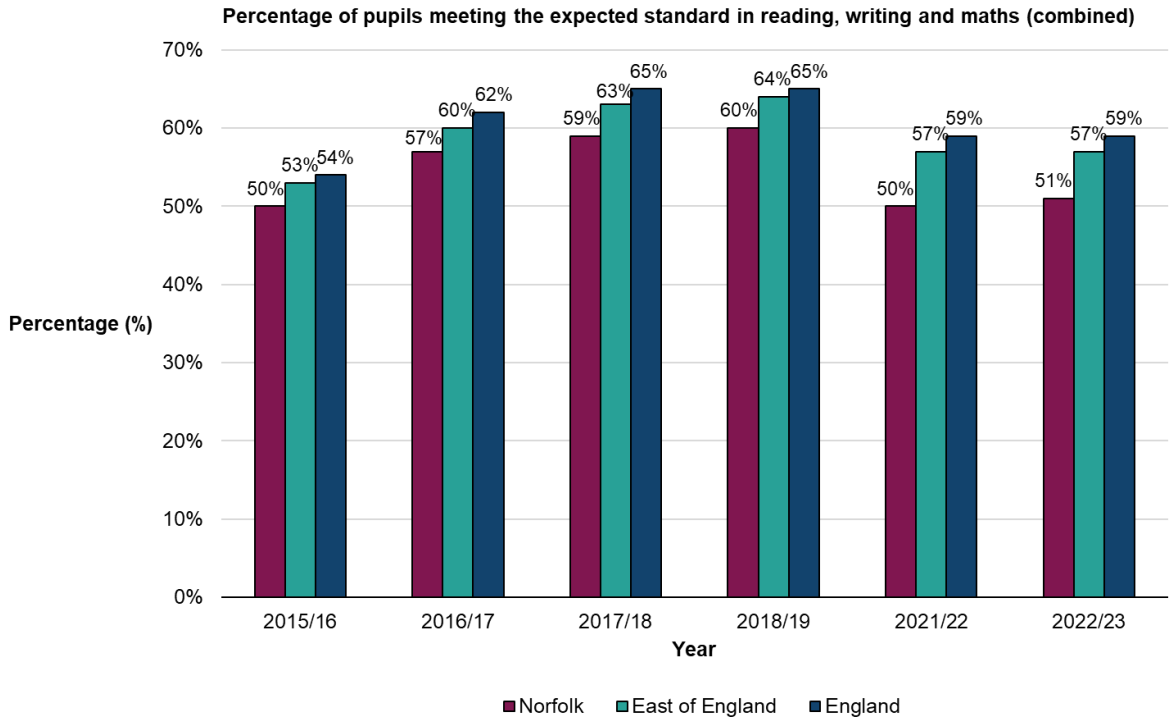
Source: Percentage of households in fuel poverty - Low Income/Low energy Efficiency (LILEE) | Data Explorer - Norfolk Insight

Early Year's Education (KS2)

Figure 27 shows the percentage of pupils meeting the expected standard in reading, writing and maths (combined). There is no data available for the years 2019/20 and 2020/21 as assessments were cancelled due to the COVID-19 pandemic.

Norfolk's early year's attainment levels have been consistently lower than the region and country from 2015/16 to 2022/23.

Figure 27: Percentage of pupils meeting the expected standard in reading, writing, and maths (combined)

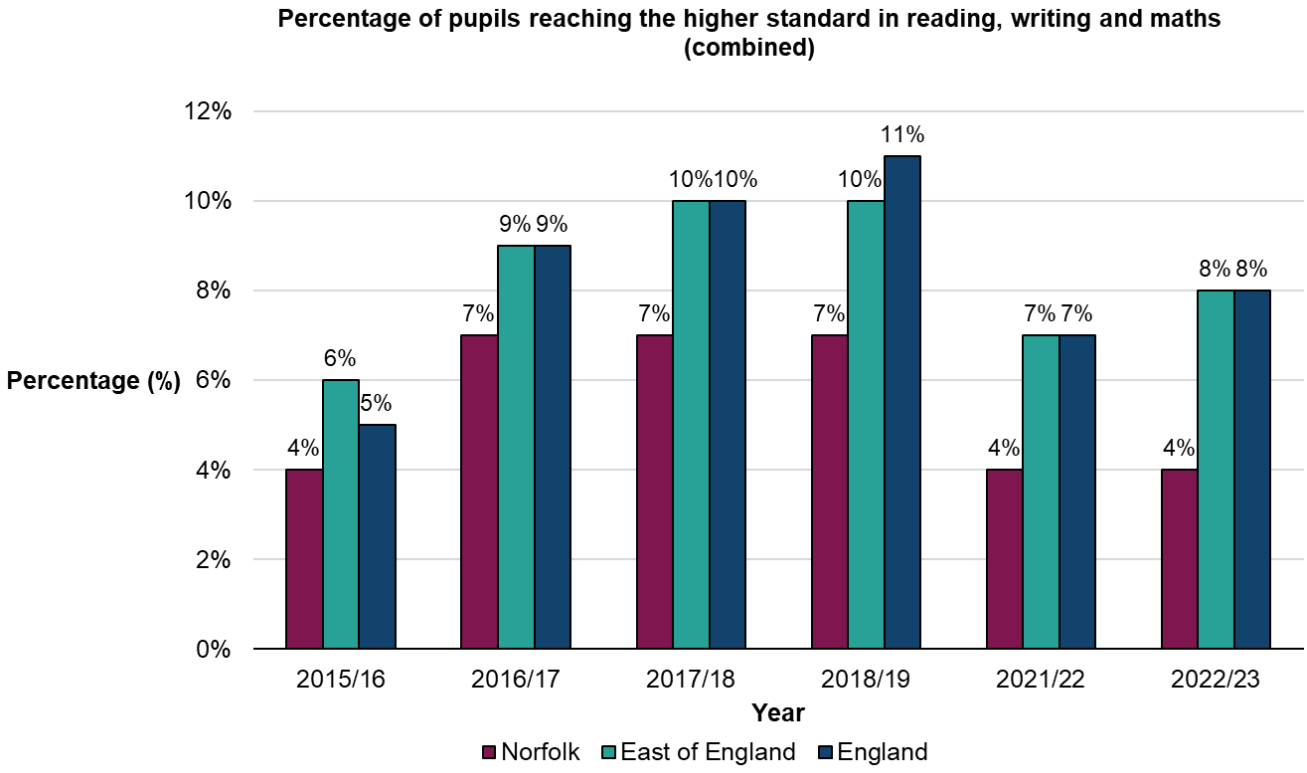


Source: 'Attainment by region and local authority' from 'Key stage 2 attainment', Permanent data table - Explore education statistics - GOV.UK

Similar to the above, Figure 28 shows the percentage of pupils reaching the higher standard in reading, writing and maths (combined) from years 2015/16 to 2022/23. Again, there is no data available for the years 2019/20 and 2020/21 as assessments were cancelled due to the COVID-19 pandemic.

Although there have been slight increases over the years for Norfolk, East of England, and England, this drops slightly for years 2021/22 and 2022/23. Overall Norfolk is consistently below both the East of England and England.

Figure 28: Percentage of pupils reaching the higher standard in reading, writing, and maths (combined)



Source: 'Attainment by region and local authority' from 'Key stage 2 attainment', Permanent data table - Explore education statistics - GOV.UK

Table 8: Percentage of pupils reaching expected and higher standard in reading, writing and maths (combined) for Norfolk, East of England, and England.

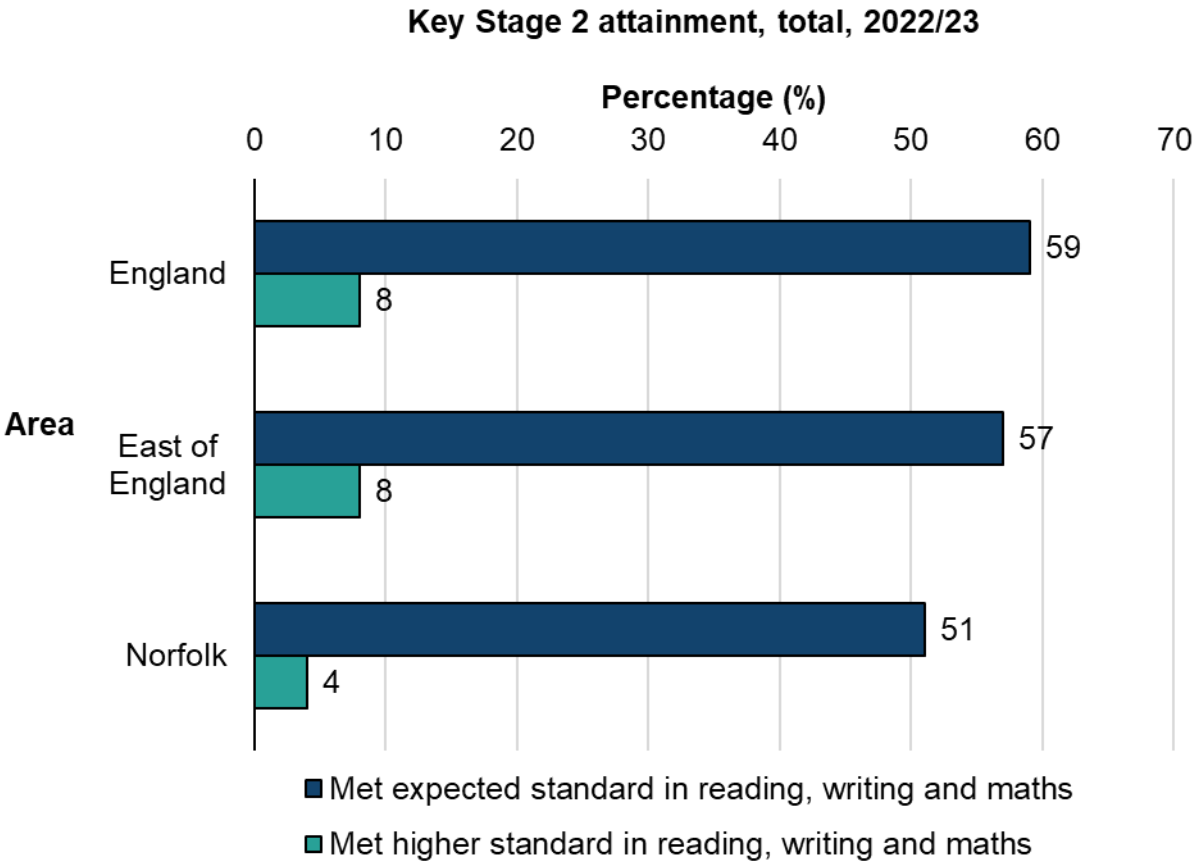
Location	Pupils reaching expected standard (2022/23)	Pupils reaching higher standard (2022/23)
Norfolk	51%	4%
East of England	57%	8%
England	59%	8%

Source: 'Attainment by region and local authority' from 'Key stage 2 attainment', Permanent data table – Explore education statistics – GOV.UK

As previously mentioned, Norfolk's 2022/23 Key Stage 2 attainment levels for reading, writing and maths were below both the East of England and England.

Figure 29 (and Table 8 above) shows the percentage of pupils reaching the expected and higher standards for reading, writing and maths for 2022/23 for Norfolk, East of England, and England. Norfolk is lower for both expected and higher standard than both East of England and England.

Figure 29: Key Stage 2 attainment percentage (2022/23)

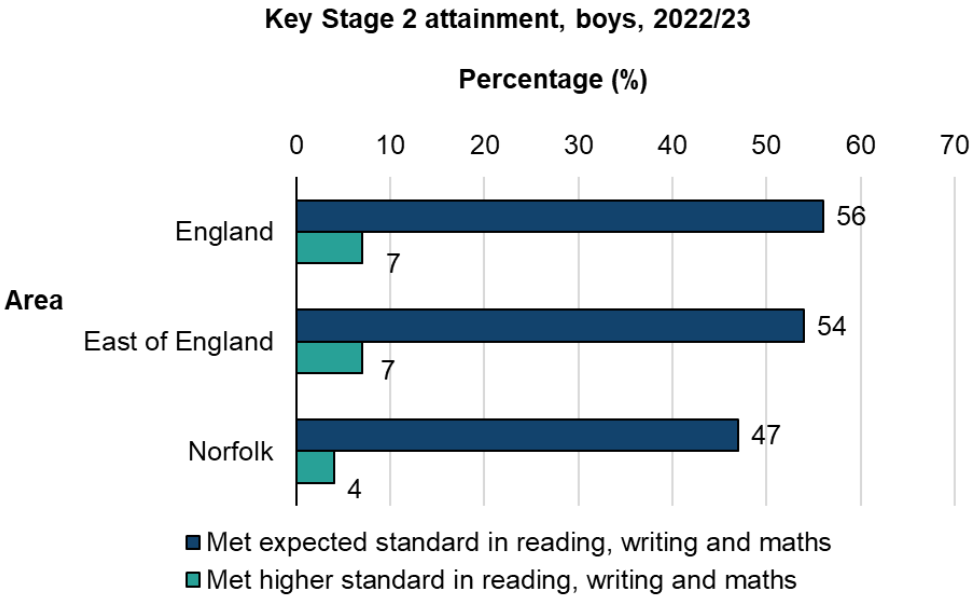


Source: 'Attainment by region and local authority' from 'Key stage 2 attainment', Permanent data table – Explore education statistics – GOV.UK

Early Year's Education (KS2) by Sex

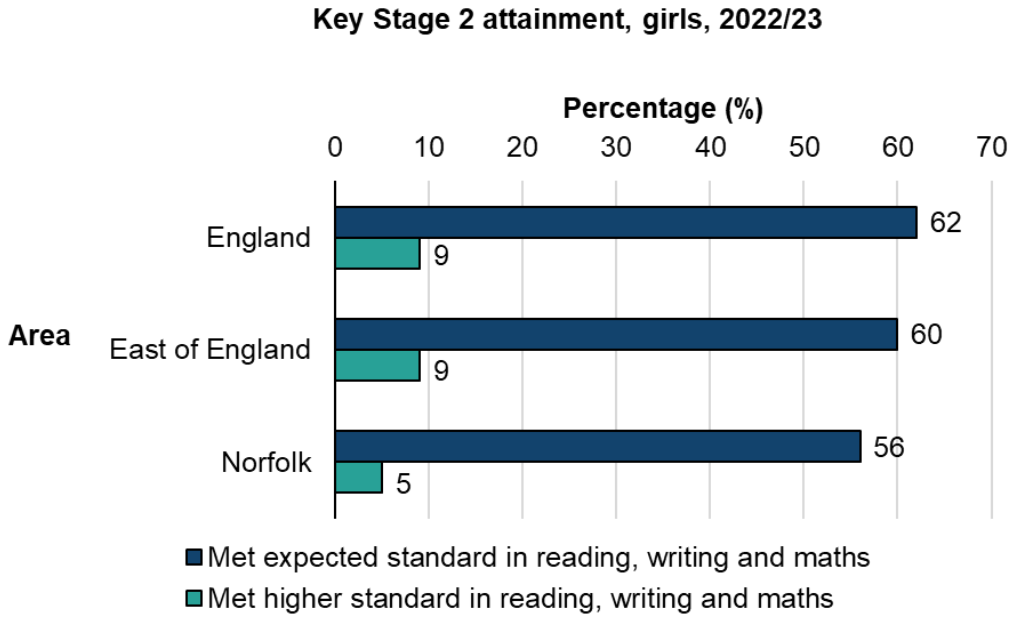
When looking at the Norfolk data by sex, boys' levels of attainment for both 'met expected' and 'met higher standard' were generally lower than the girls. Both girls' and boys' levels of attainment follow the trend of scoring below East of England and England, see Figure 30.

Figure 30: Key Stage 2 attainment for boys (2022/23)



Source: 'Attainment by region and local authority' from 'Key stage 2 attainment', Permanent data table – Explore education statistics – GOV.UK

Figure 31: Key Stage 2 attainment for girls (2022/23)

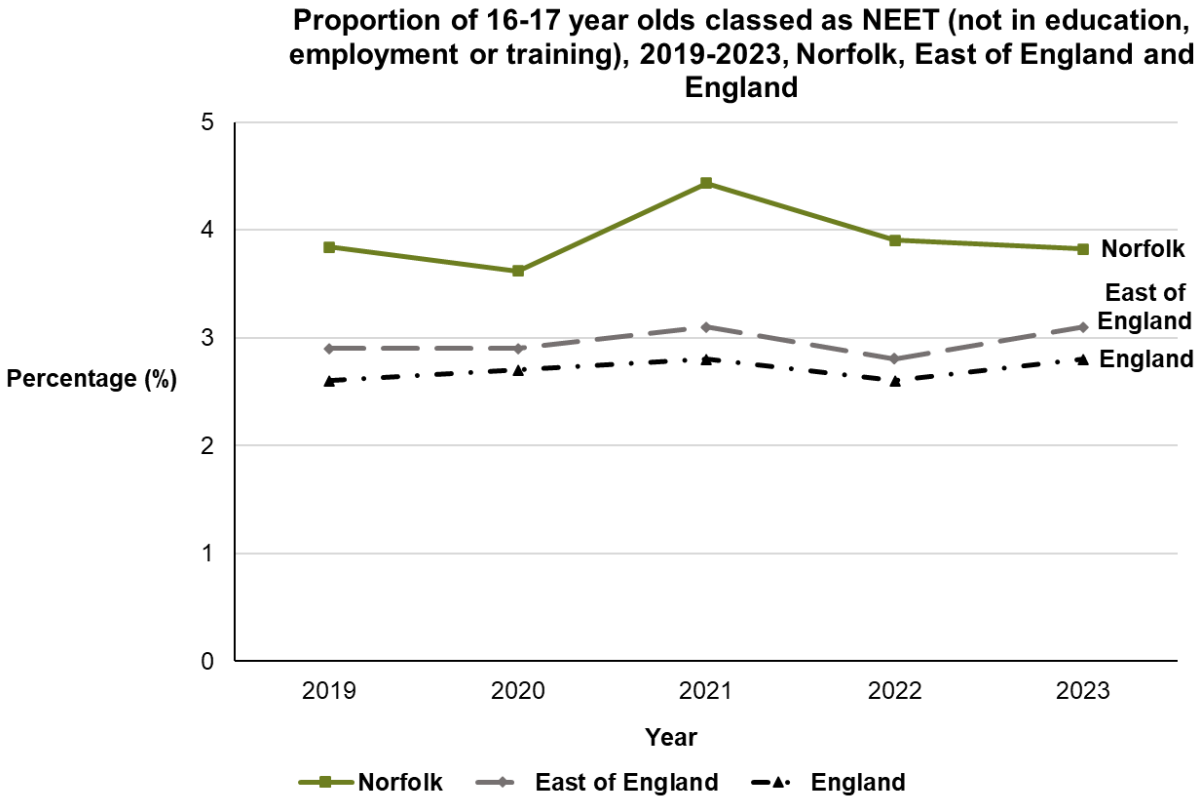


Source: 'Attainment by region and local authority' from 'Key stage 2 attainment', Permanent data table – Explore education statistics – GOV.UK

Not in Education, Employment, or Training (NEET)

As shown in Figure 32, Norfolk has consistently had a higher proportion of 16–17-year-olds classed as NEET than both the East of England and England. As of 2023, the proportion of 16–17-year-olds classified as NEET stood at 3.8% for Norfolk. By contrast, only 3.1% of 16–17-year-olds in the East of England region were classified as NEET. For England, in 2023, this figure stood at 2.8%.

Figure 32: Proportion of 16–17-year-olds classified as NEET for Norfolk, the East of England, and England (2019-2023)



Source: [Participation in education, training and NEET age 16 to 17 by local authority, Academic year 2022/23 – Explore education statistics – GOV.UK]

Student Population

According to the 2021 Census, 5.5% of Norfolk's population is classed as full-time students, compared to 7.1% in England overall. See Table 9.

Norfolk ranks 121st out of 175 upper tier local authorities in England and Wales for the proportion of "all usual residents aged 16 and over" that are "full-time students".

Norwich is the highest ranking of Norfolk's seven lower-tier local authorities, ranking 10th out of 318.

Great Yarmouth ranked 210th, whilst all the remaining other Norfolk districts ranked between 282nd and 317th, with three ranking in the bottom seven (North Norfolk, King's Lynn and West Norfolk, and Breckland).

Table 9: Percentage of population classed as full-time students

Location	Percentage of population classed as full-time students
Breckland	4.1%
Broadland	4.4%
Great Yarmouth	5.1%
King's Lynn and West Norfolk	3.9%
Norwich	12.7%
North Norfolk	3.5%
South Norfolk	4.5%
England	7.1%

Source: 2021 Census, Nomis, accessed January 2024

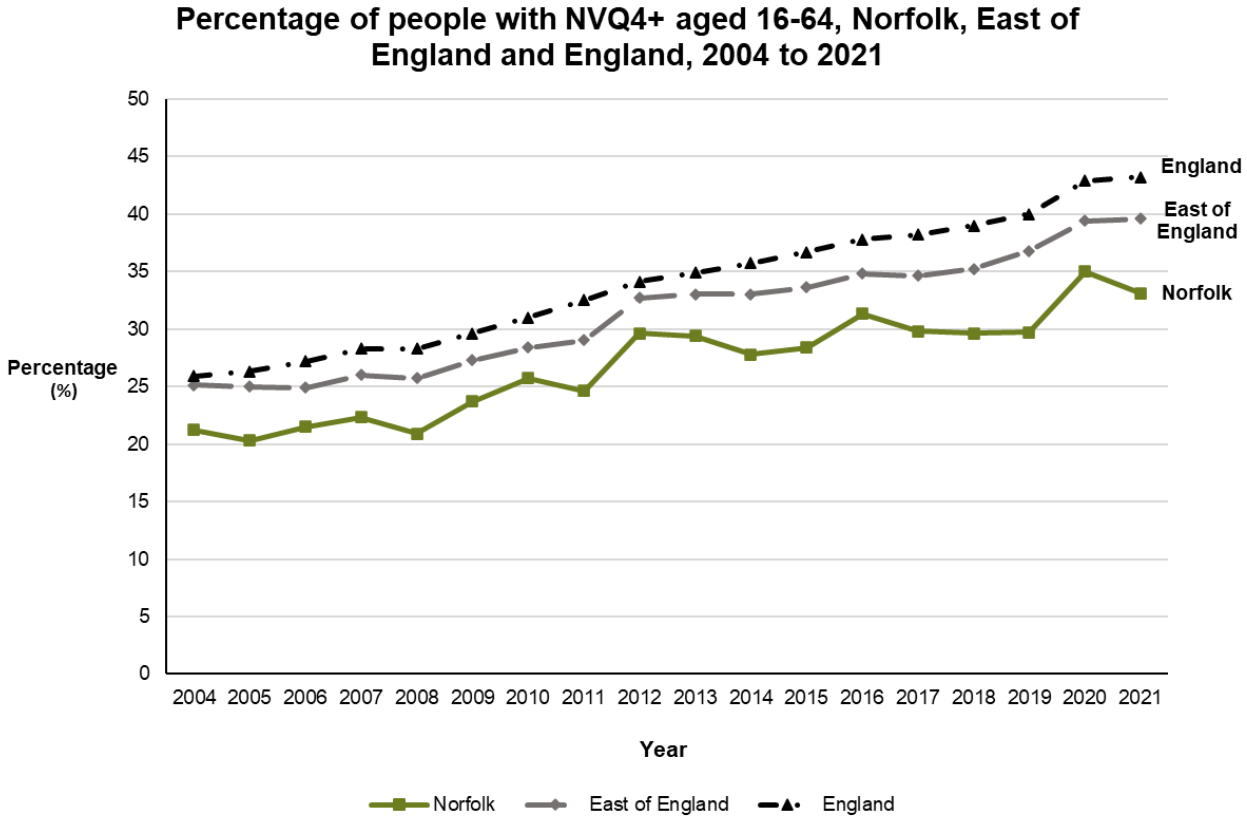
Calculated using figures shown and 'full time student' cohorts as a proportion of 'all usual residents aged 16 years and over in households'. It should be noted that students were given guidance on how to complete the Census, more information is available from the Census 2021 - Office for National Statistics.

Skills and Qualifications

The percentage of people aged 16-64 in Norfolk with level 4 (or higher) qualifications has consistently remained below both the national and regional percentages with the same level of qualification.

Between January 2021 and December 2021, the percentage of people aged 16-64 with NVQ4+ in Norfolk stood at 33.1%. Across the East of England region, this figure stood at 39.6%. By contrast, across the whole of England, 43.2% of 16-64 year olds had level four qualifications or higher.

Figure 33: Percentage of people with NVQ4+ aged 16-64 in Norfolk, the East of England, and England (2004 to 2021)



Source: Annual Population Survey, Nomis, accessed November 2023

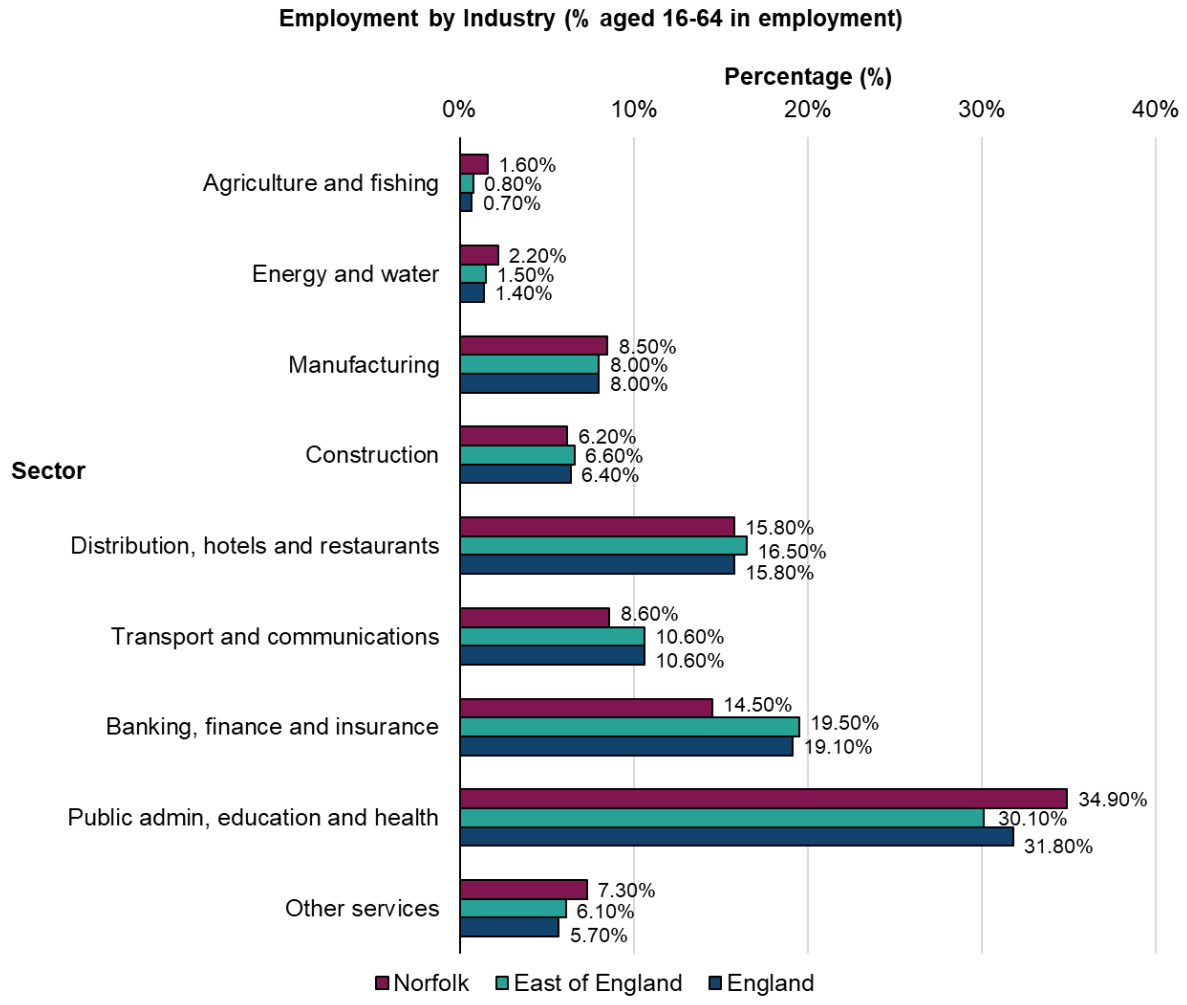
Employment by Industry

Norfolk has a higher percentage of employment than England and the East of England in the following industries – 'Public administration, education and health' (34.9%), 'Manufacturing' (8.5%), 'Energy and Water' (2.2%) and 'Agriculture and Fishing' (1.6%).

Norfolk has a lower percentage of employment when compared to England and the East of England in the following industries – 'Banking, Finance and Insurance' (14.5%), 'Transport and Communication' (8.6%) and 'Construction' (6.2%).

Norfolk is on par with the national level in the 'Distribution of hotels and restaurants' at 15.8%.

Figure 34: Employment by industry (percentage aged 16-64 in employment) 2022-2023



Source: [Nomis - Official Census and Labour Market Statistics]

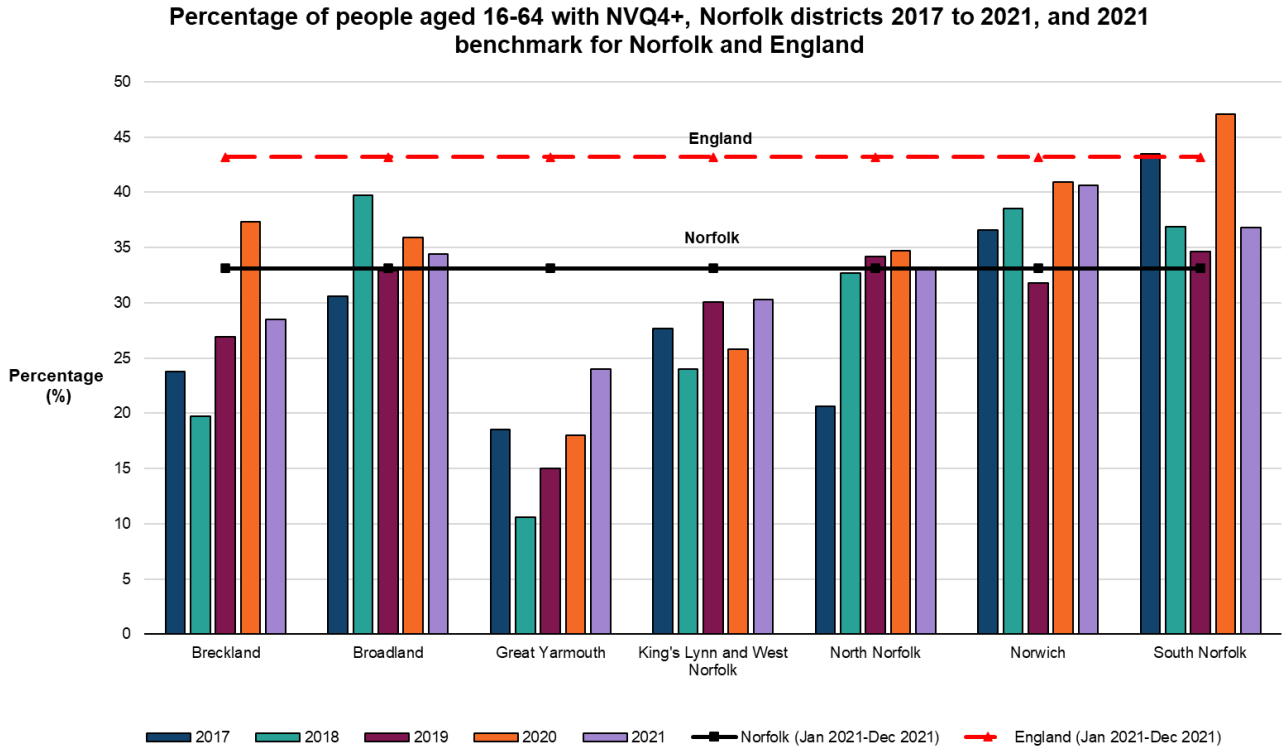
Skills and Qualifications by District

As outlined in Figure 35, while some of Norfolk's districts are above or close to the county overall, none reach the national percentage for 2021. Some districts have a relatively low percentage of people with level 4+ qualifications when compared to England as a whole.

In 2021, three districts (Broadland, Norwich, and South Norfolk) had a higher percentage of people aged 16-64 with a level 4+ qualification than Norfolk overall.

However, none of the districts had the same or higher percentages than the national percentage of 43.2% in 2021.

Figure 35: Percentage of people aged 16-64 with NVQ4+ for Norfolk districts (2017 to 2021) and 2021 benchmark for Norfolk and England



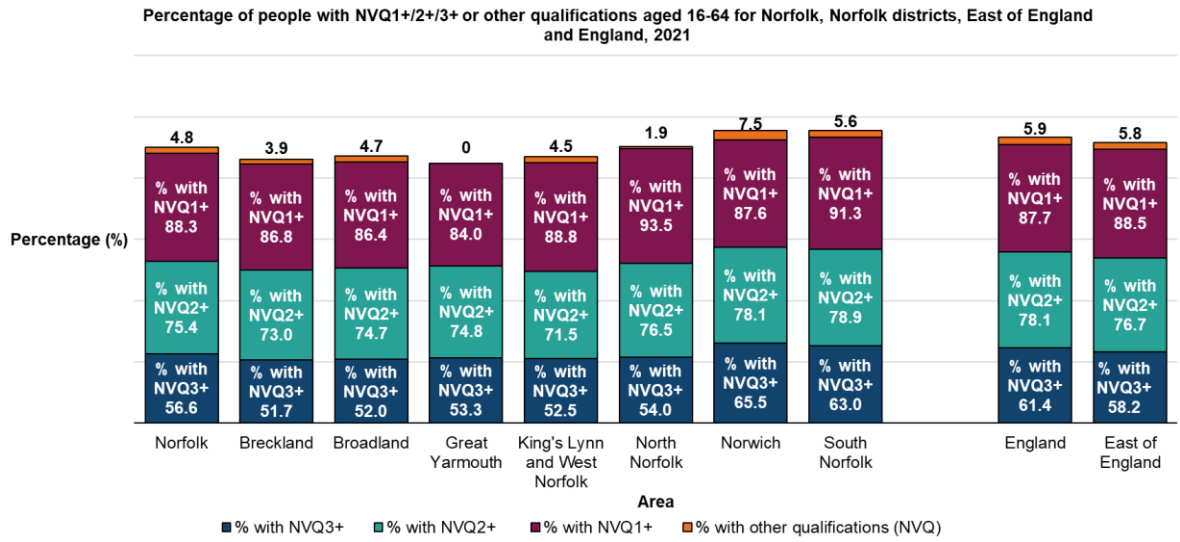
Source: Annual Population Survey, Nomis, Accessed November 2023

Other Qualifications

Figure 36 shows the percentage of people in each district with each level of qualification for January 2021 to December 2021, with Norfolk, England, and the East of England for comparison.

South Norfolk is the only district to have higher proportions of people with all of the different qualifications than England as a whole.

Figure 36: Percentage of people with NCQ1+/2+/3+ or other qualifications aged 16-64 for Norfolk, Norfolk districts, the East of England, and England (2021)



Source: Nomis - Official Census and Labour Market Statistics

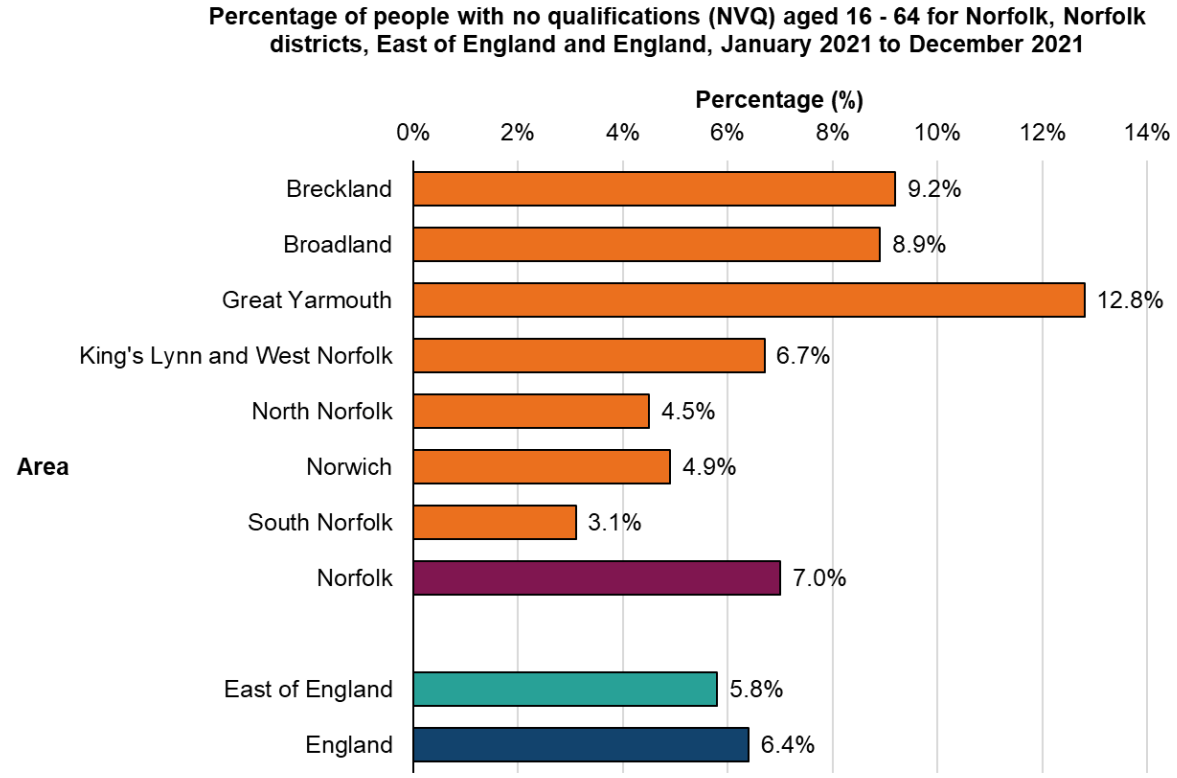
No Qualifications

As shown in Figure 37, the 2021 data shows that 7% of people aged 16-64 in Norfolk had no qualifications, compared to 6.4% in England and 5.8% in the East of England for the same period.

Four of the seven Norfolk districts have a higher percentage of people aged 16-64 with no qualifications than England. These were Breckland (9.2%), Broadland (8.9%), Great Yarmouth (12.8%) and King's Lynn and West Norfolk (6.7%).

Great Yarmouth had the highest percentage of people aged 16-64 with no qualifications (12.8%) while South Norfolk (3.1%) had the lowest percentage.

Figure 37: Percentage of people with no qualifications (NVQ) aged 16-64 for Norfolk, Norfolk districts, the East of England, and England (January to December 2021)



Source: Nomis - Official Census and Labour Market Statistics

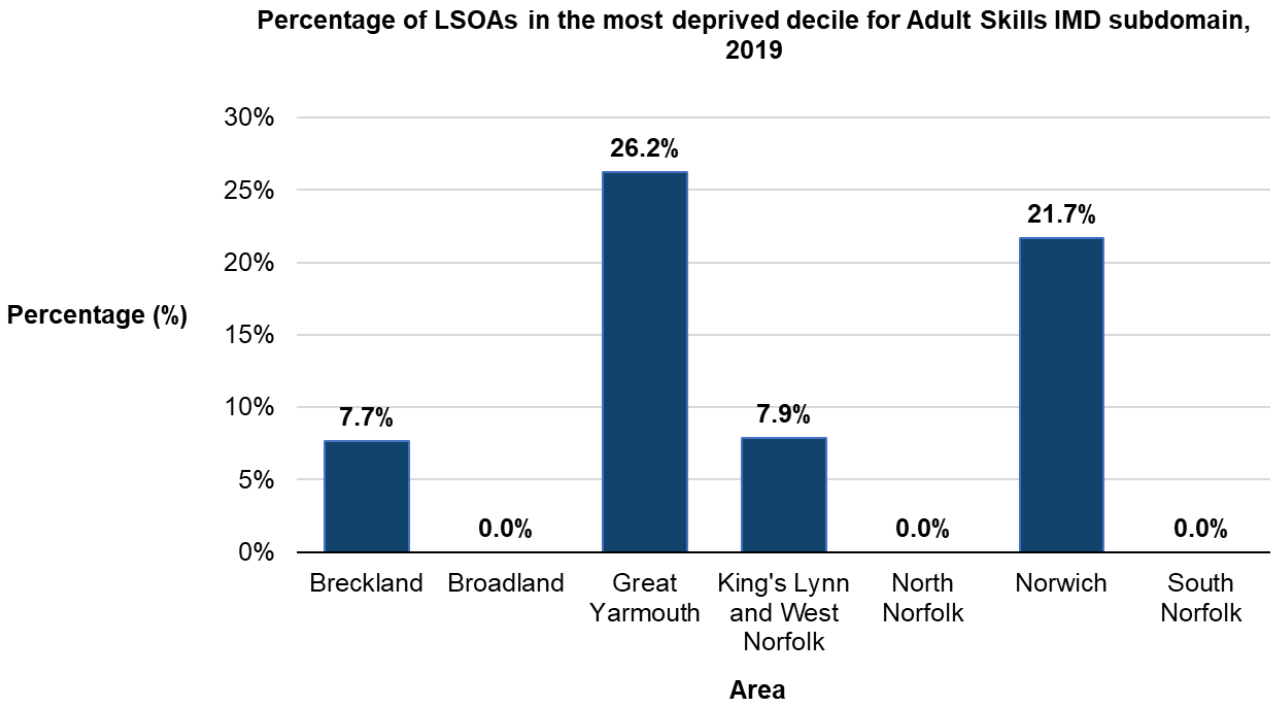
IMD – Education, Skills, and Training

Within the Education domain of IMD there is an Adult Skills sub-domain. Figure 38 shows the proportion of LSOAs, within a local authority district, that fall within the most deprived 10% nationally, for the Adult Skills sub-domain.

Broadland, North Norfolk, and South Norfolk have no LSOAs within the most deprived 10% nationally for Adult Skills. However, the remaining four Norfolk districts have proportions that are above the East of England average (5%), with Great Yarmouth the only district within the East of England to have a proportion higher than 25%. That is, over a quarter of Great Yarmouth's LSOAs fall within the most deprived 10%, nationally, for Adult Skills.

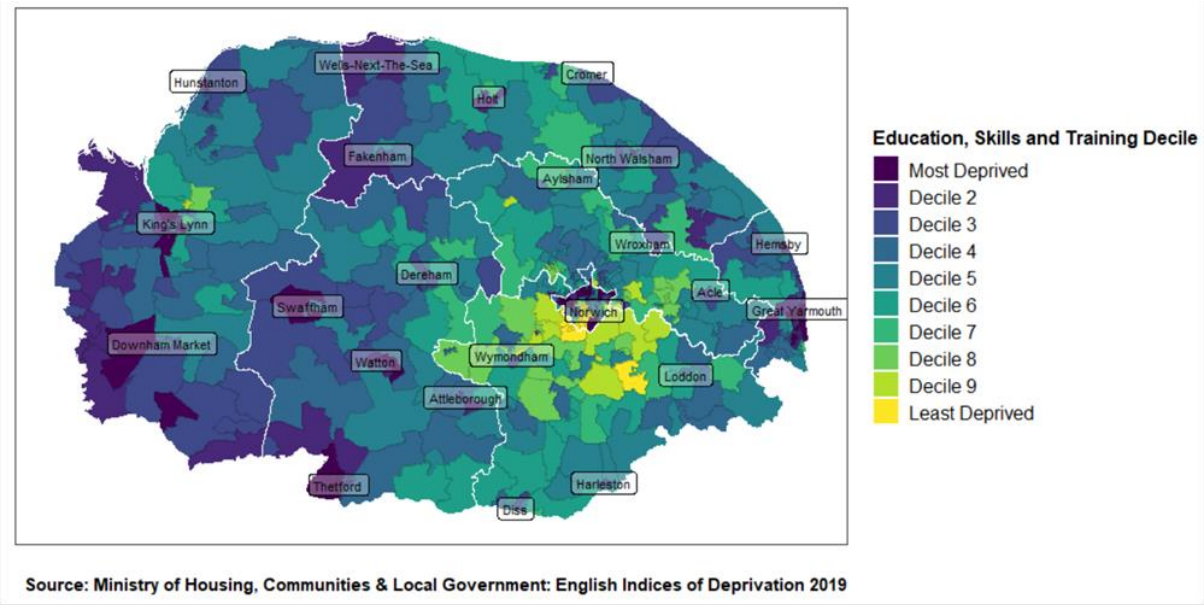
The map of Norfolk LSOAs below (Figure 39) shows pockets of Education, Skills, and Training deprivation in areas such as Downham Market, Swaffham, Watton, and South Holt.

Figure 38: Percentage of LSOAs in the most deprived decile for Adult Skills IMD subdomain (2019)



Source: [IMD - Adult Skills Sub-domain - proportion of LSOAs in most deprived 10% nationally in Breckland | LG Inform]

Figure 39: Education, Skills, and Training IMD deciles for Norfolk LSOAs (2019)

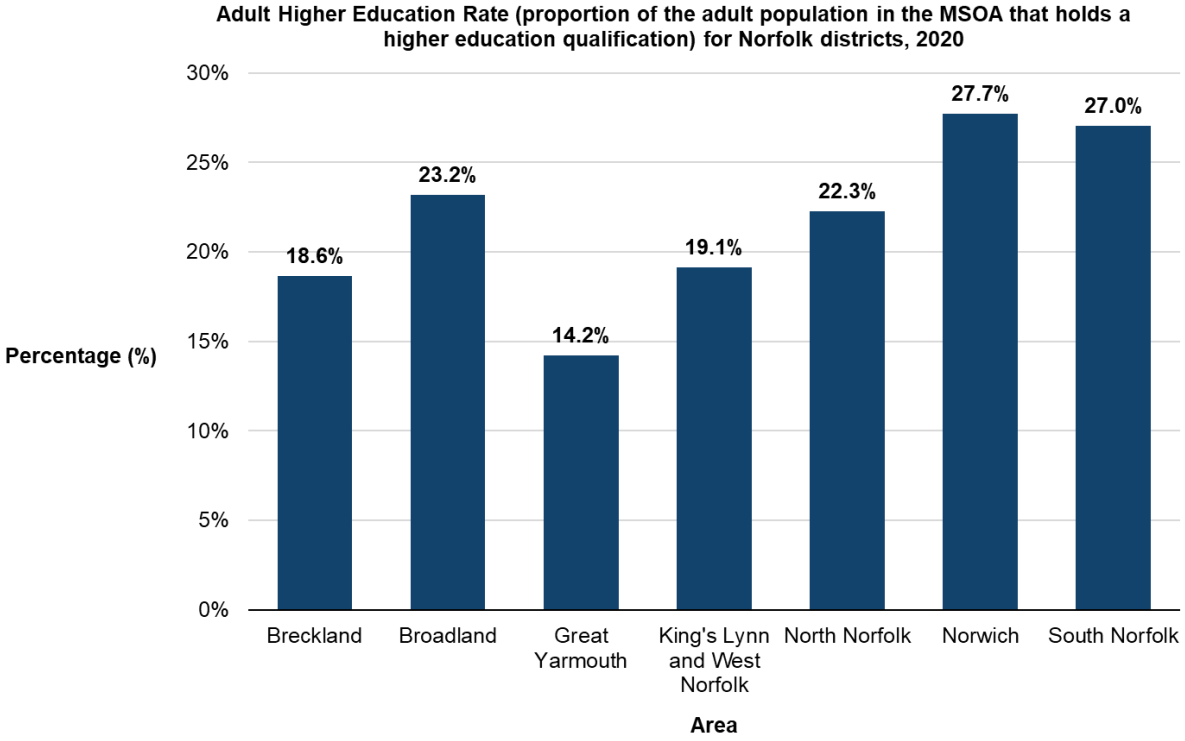


Source: [IMD - Adult Skills Sub-domain - proportion of LSOAs in most deprived 10% nationally in Breckland | LG Inform]

Adult Education Rate/POLAR4 Quintile by District

As shown in Figure 40, over a quarter of the adult population in Norwich (27.2%) and South Norfolk (27.0%) held higher education qualifications in 2020, compared to 14.2% in Great Yarmouth and 19.2% in King's Lynn and West Norfolk.

Figure 40: Adult Higher Education rate for Norfolk's districts



Source: Office for Students – Young participation by area, postcode data

The participation of local areas (POLAR) classification groups areas across the UK based on the proportion of young people who participate in higher education.

It looks at how likely young people are to participate in higher education across the UK and shows how this varies by area.

POLAR classifies local areas into five groups, or quintiles, based on the proportion of young people who enter higher education aged 18 or 19 years old.

Quintile one shows the lowest rate of participation. Quintile five shows the highest rate of participation.

Table 10: Mode average POLAR4 quintile

Norfolk district	Mode average (i.e. most common at MSOA level) POLAR4 quintile
Breckland	Quintile 2 (7 of 17 MSOAs)
Broadland	Quintile 2 / Quintile 3 (both 6 of 18 MSOAs)
Great Yarmouth	Quintile 1 (7 of 13 MSOAs)
King's Lynn and West Norfolk	Quintile 1 (11 of 19 MSOAs)
North Norfolk	Quintile 3 (7 of 14 MSOAs)
Norwich	Quintile 1 (8 of 14 MSOAs)
South Norfolk	Quintile 4 (6 of 15 MSOAs)

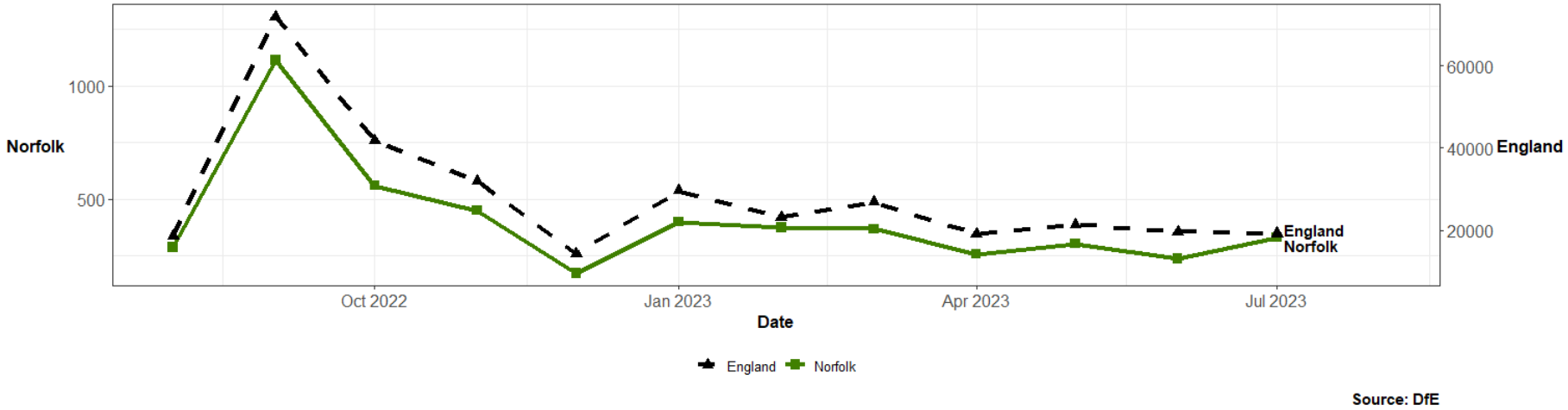
Source: Office for Students – Young participation by area, postcode data

Apprenticeship Starts

Norfolk's apprenticeship starts have followed the same trend as England overall.

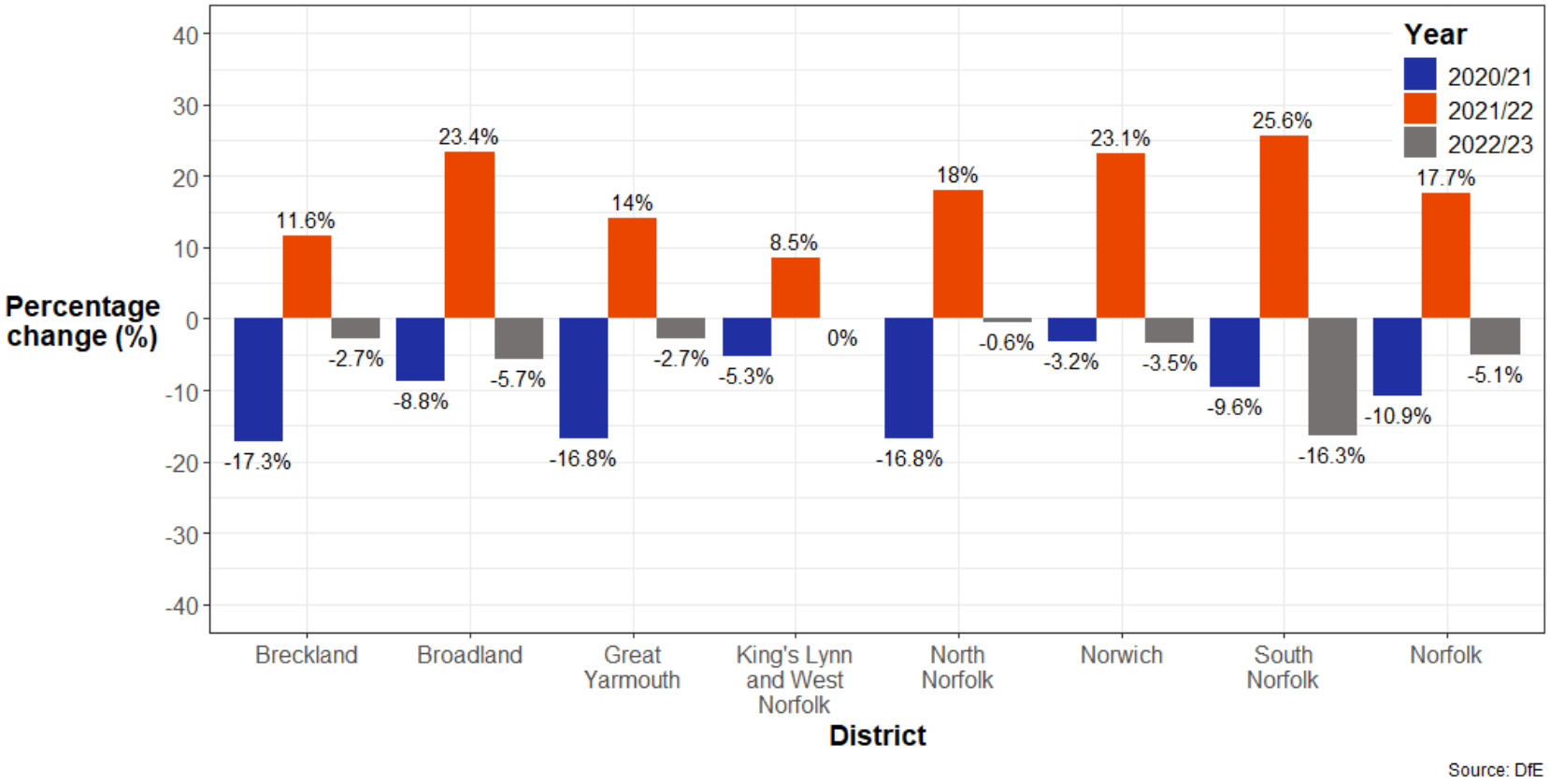
2022/23 has seen a lower number of starts in comparison to 2021/22, and this trend is also reflected across all the districts.

Figure 41: Apprenticeship starts in England and Norfolk during 2022/23 academic year



Source: Apprenticeships, Academic year 2023/24 - Explore education statistics

Figure 42: Percentage change of apprentice starts within the districts of Norfolk between 2020/21 to 2022/23



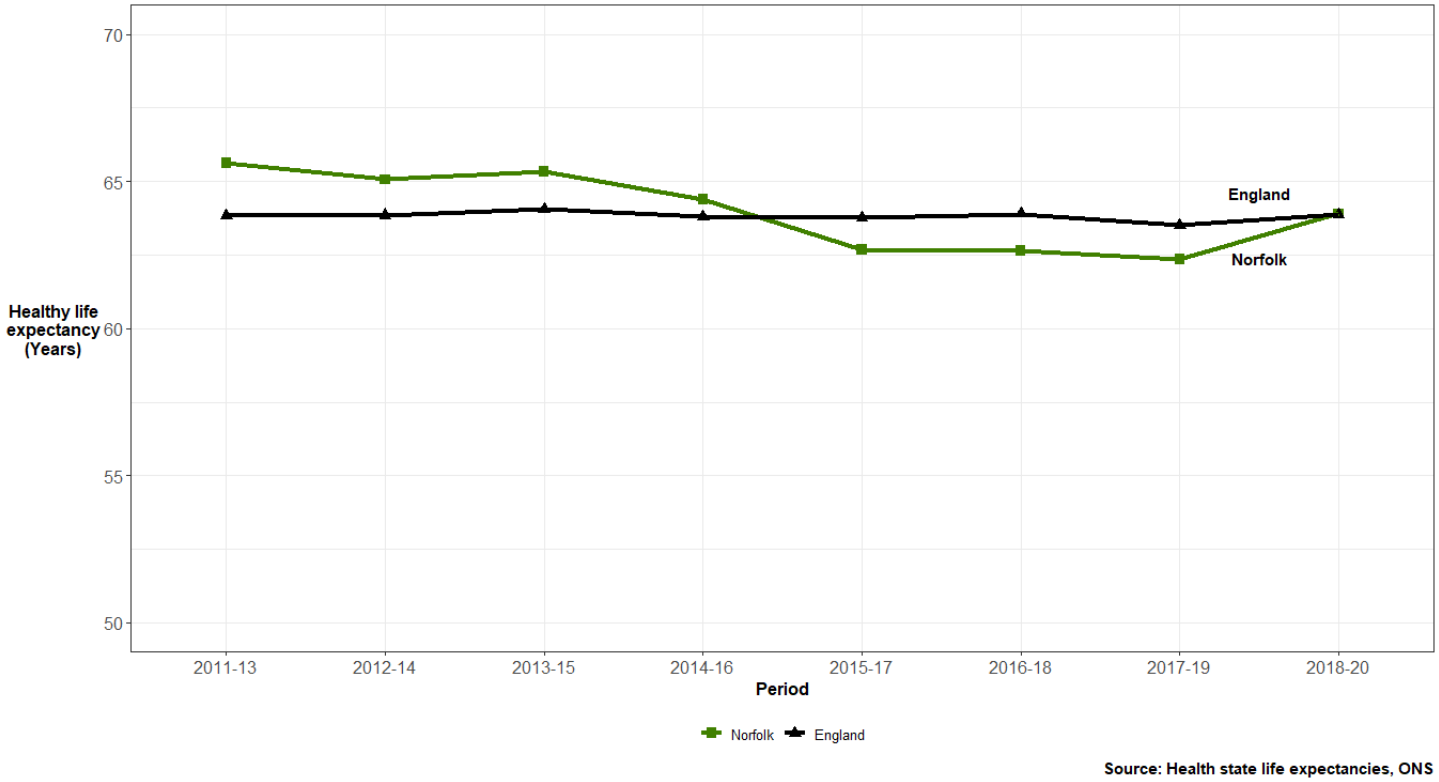
Source: [Apprenticeships, Academic year 2023/24 - Explore education statistics]

Healthy Life Expectancy

Healthy life expectancy at birth was 62 years and 11 months for men in Norfolk in 2018-20 (compared to 63 years for England) and 63 years and 11 months for women in Norfolk – the same as England overall (for the same period).

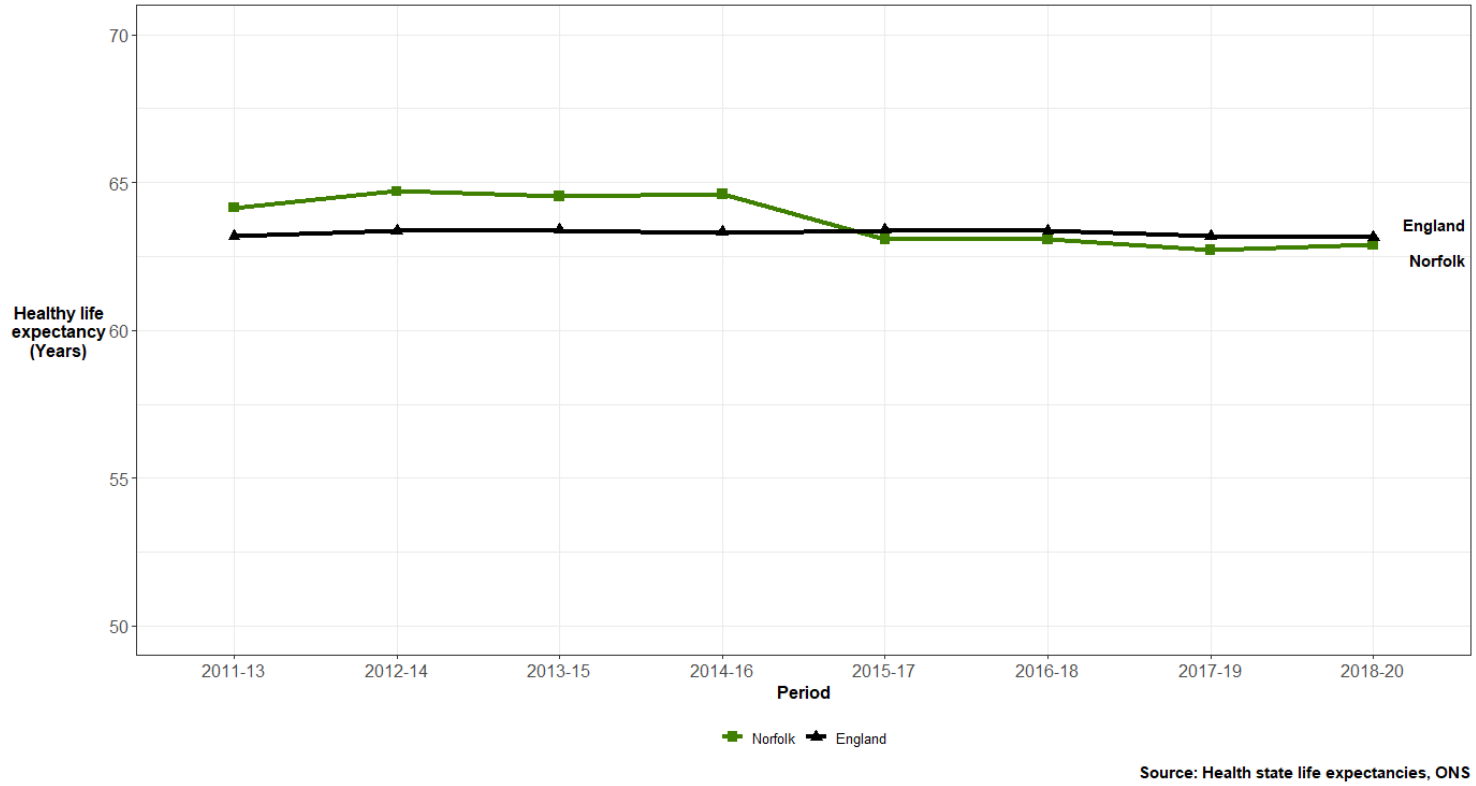
Healthy life expectancy is created from data obtained from population surveys such as the Annual Population Survey. Sample sizes are not large enough to create lower tier LA level figures.

Figure 43: Healthy Life Expectancy at birth for females in Norfolk and England (2011-13 to 2018-2020)



Source: ONS – Healthy Life Expectancy

Figure 44: Healthy Life Expectancy at birth for males in Norfolk and England (2011-13 to 2018-20)

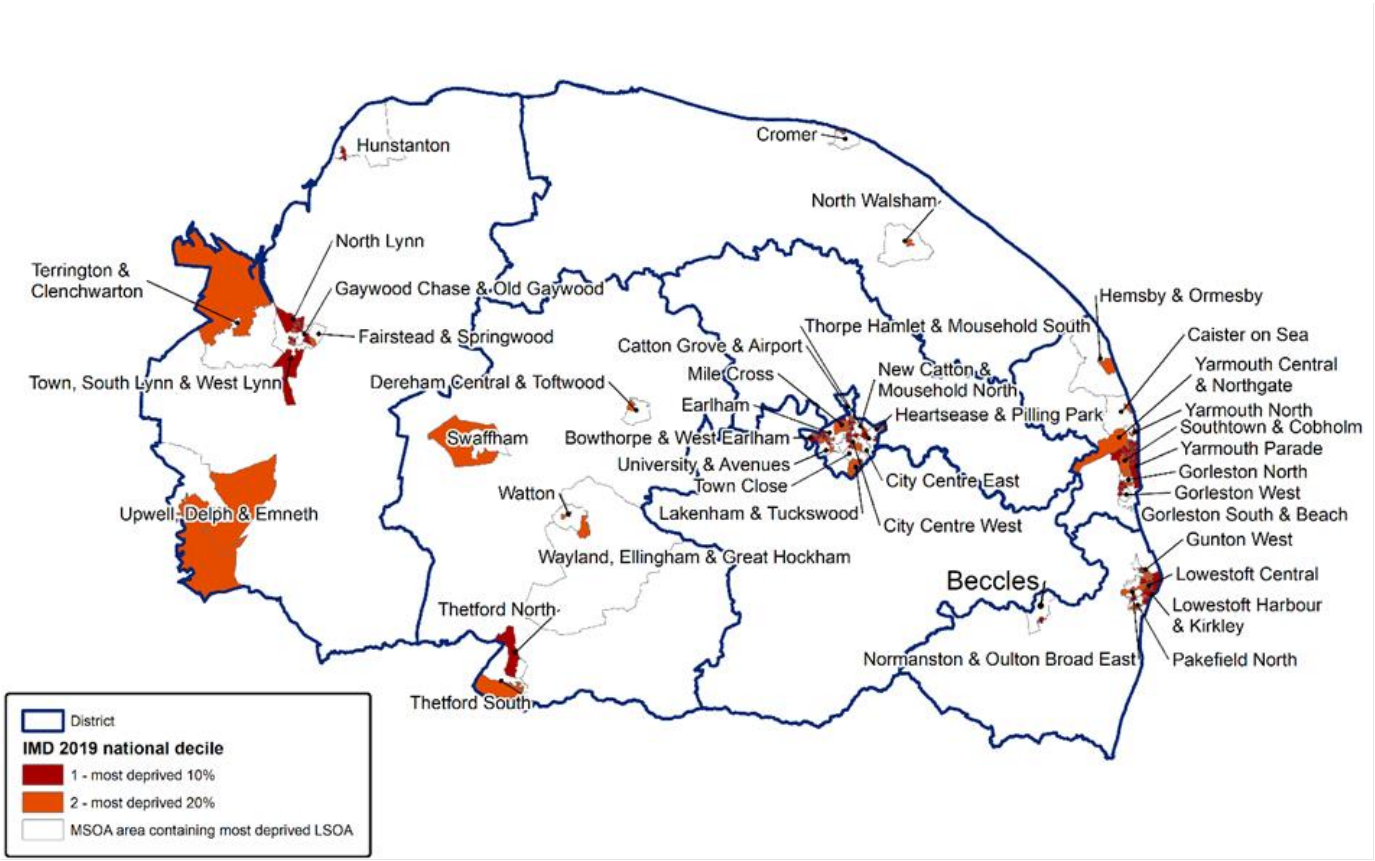


Source: ONS – Healthy Life Expectancy

Life Expectancy

There is a difference in life expectancy between districts, but this is wider if we look at smaller communities like market towns. For example, a male in Loddon can expect to live to 83.3 years but a male in Great Yarmouth can expect to live 75.1 years. A female living in Southwold can expect to live for 86.4 years but a female in King's Lynn can expect to live for 81 years.

Figure 45: Core20 most deprived communities across Norfolk and Waveney



Source: [Fingertips, Local health, public health data for small geographic areas]

The Market Town life expectancy gap is 8.2 years for men and 5.4 years for women (using local PHI calculations using NHS Digital civil registration data).

But between some of the most deprived core20 communities and least deprived communities it is 9.2 years for men and 7.2 years for women.

Source: Local health, public health data for small geographic areas

Table 11: Life expectancy for males and female in Norfolk and comparator areas

Locality	Male Life Expectancy 2015 to 2019 (years)	Female Life Expectancy 2015 to 2019 (years)
Great Yarmouth	75.1	81.2
King's Lynn	76.7	81.0
Loddon	83.3	85.8
Southwold	82.0	86.4
Norfolk	80.0	83.8
Norfolk and Waveney	80.0	83.8

Source: Fingertips, Local health, public health data for small geographic areas

Health Inequality in Norwich

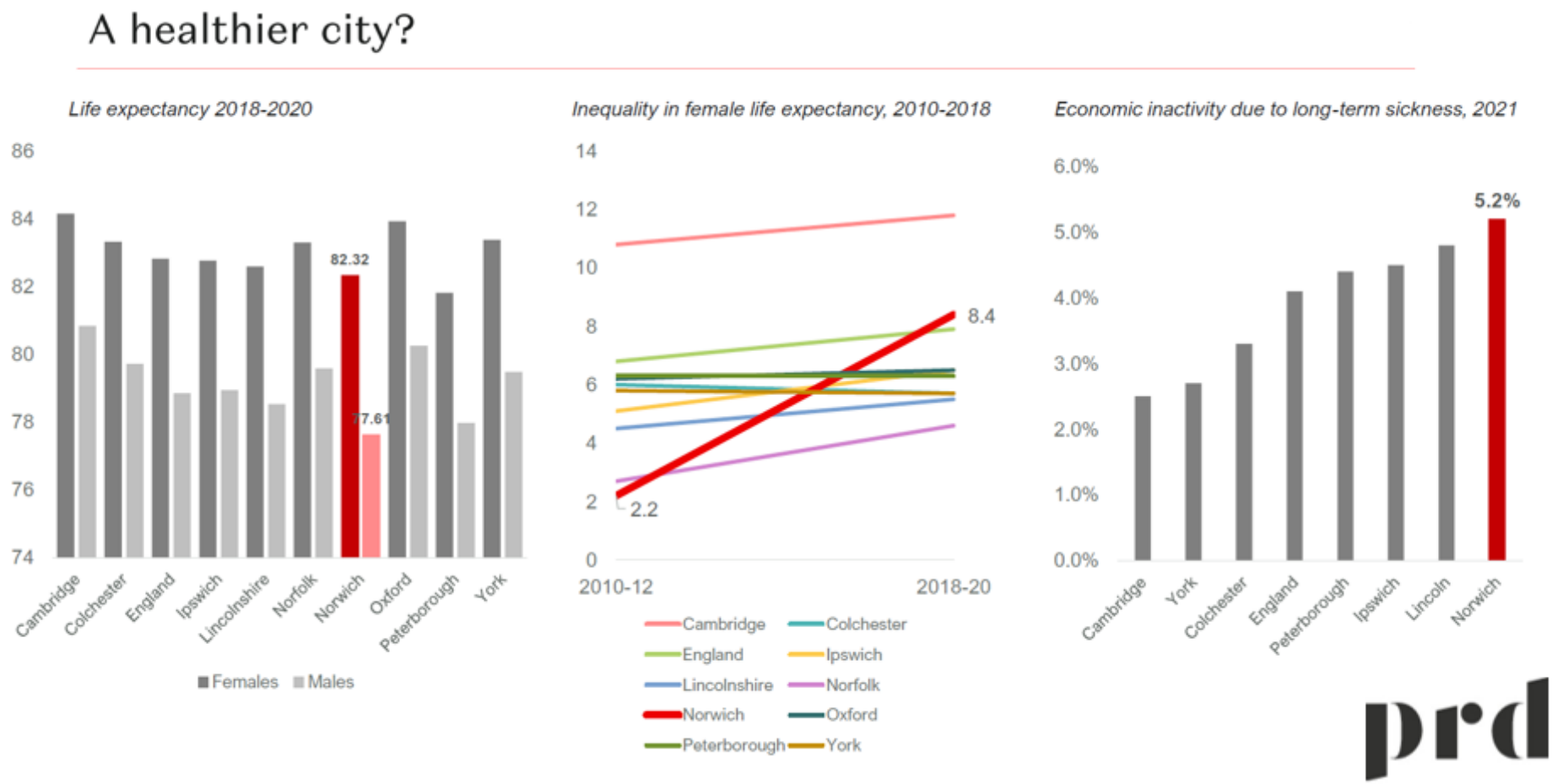
Norwich is ranked across health-based metrics against other comparable cities (Cambridge, Oxford, Peterborough, Colchester, Lincoln, York and Ipswich) as well as the English and wider Norfolk average.

In 2021, Norwich had the highest economic inactivity due to long-term sickness (5.2% compared to a national average of 4%).

Norwich also fares poorly in terms of life expectancy, with the second-lowest female life expectancy (82.32) and lowest male life expectancy (77.61). From a national perspective, it is the forty-second (in the top 20%) most unequal local authority in the country.

Norwich is the 42nd most unequal local authority in the country (top 20%) and 10th highest educational inequality rate.

Figure 46: Norwich's rank for health inequality against other comparable cities, Norfolk and England



Source: Partnering Regeneration Development Ltd (PRD)

The ‘life expectancy 2018-2020’ graph shows the life expectancy difference in years between Norwich and Norfolk, the comparable locations of Cambridge, Colchester, Ipswich, Lincolnshire, Oxford, Peterborough and York and the English average. With an average female life expectancy of 82.32 and an average male life expectancy of 77.61, Norwich is behind the English national average.

In comparison to the same locations and the national average for England, the ‘inequality in female life expectancy, 2010-2018’ graph shows that Norwich has become increasingly unequal in this area. Norwich is ahead of the national average and only Cambridge is more unequal in this area.

The ‘Economic inactivity due to long-term sickness, 2021’ graph shows that Norwich has the highest proportion (5.2%) of economically inactive people when compared to Cambridge, York, Colchester, Peterborough, Ipswich, Lincoln and the English national average.

Business

Key Metrics Analysis – Business

This section looks at:

- Key sector and cluster (including definitions)
- Business Counts
- Distribution of clusters between districts
- Gross Value Added (GVA)
- Jobs and Average wages
- Location Quotient and competitive effect
- Percentage change in jobs and job forecast
- Norfolk businesses – sectors
- Norfolk's tourism sector
- Norfolk businesses – sizes
- Business change
- Business 'births', and survival rates
- Sole proprietors
- High Growth enterprises
- Norfolk's employment base and change
- Productivity (GVA)
- Indexed GVA per hour worked
- GVA by sector

Key Sector and Cluster Definitions

The sector definitions provided below are only for the 12 key sectors that are a part of the business cluster analysis methodology developed for the Economic Strategy Evidence Base.

The following sections use the latest (2023) Lightcast data for the sectors defined below: Gross Value Added (GVA), Jobs and Average wages, Location Quotient and Competitive Effect and Percentage change in Jobs and Job Forecast.

The definitions provided below are not intended to replace or replicate strict Standard Industrial Classification (SIC) sector definitions, while specific SIC sector codes definitions will be composite elements within these strategic opportunities, they are deliberately intended to be cross-cutting and are understood to often operate in support of one another - fundamentally underpinning the over-arching objective of clean growth.

Definitions

- **Advanced Manufacturing and Engineering** – This sector includes industries involved in the use of cutting-edge technology to improve products and processes. It encompasses high-precision manufacturing, automation, robotics, and materials engineering to create innovative products and solutions.
- **Creative Sector** – This sector includes industries that focus on the creation and distribution of products and services that are rooted in cultural, artistic, and design-oriented creativity. It encompasses activities such as advertising, architecture, arts, crafts, design, fashion, film, music, performing arts, publishing, and software development.
- **Ports and Logistics** – This sector involves the management of the movement of goods and services, including the operation of ports, warehousing, transportation, distribution, and supply chain management. It ensures the efficient flow of products from origin to destination.
- **Space** - This sector includes activities related to space exploration, satellite technology, space research, and the development of related technologies and infrastructure. It encompasses aerospace engineering, satellite communications, and space missions.
- **Visitor Economy** - This sector involves industries that support tourism and travel, including hospitality, accommodation, attractions, events, and services (including some retail services) that cater to tourists and visitors. It plays a key role in regional economic development by attracting visitors and their spending.
- **Construction and Development** - This sector includes industries involved in the planning, design, construction, and maintenance of buildings and infrastructure. It encompasses residential, commercial, industrial, and civil engineering projects, as well as real estate development.
- **Financial Services and Insurance** - This sector comprises industries that manage money, including banking, investment, insurance, real estate, and financial technology. It provides services such as lending, asset management, financial planning, and risk management.
- **Digital Tech** - This sector encompasses industries that develop and utilize digital technologies, including software development, IT services, cybersecurity, data analytics, artificial intelligence, and telecommunications. It focuses on the innovation and application of digital solutions.
- **Health and Social Work**– This sector includes industries that provide medical care, health services, and social support. It encompasses hospitals, clinics, healthcare professionals, social workers, and organizations that offer support for mental health, elderly care, and community services.

- **Agri-Food Tech** - This sector applies to the whole agri-food supply chain, including primary agriculture and the application of technology to agriculture and food production. It also includes activities such as precision farming, biotechnology, food processing, supply chain management, and sustainable agriculture practices to improve productivity and efficiency in the food industry.
- **Energy** - This sector includes industries involved in the production, distribution, and management of energy. It encompasses traditional energy sources like oil, gas, and coal, as well as renewable energy sources such as wind, solar, hydroelectric, and geothermal power.
- **Life Sciences** - This sector includes industries related to the study of living organisms and life processes. It encompasses biotechnology, pharmaceuticals, medical devices, healthcare, and environmental sciences. It focuses on research, development, and the application of biological and medical knowledge to improve health and the environment.

Business Counts

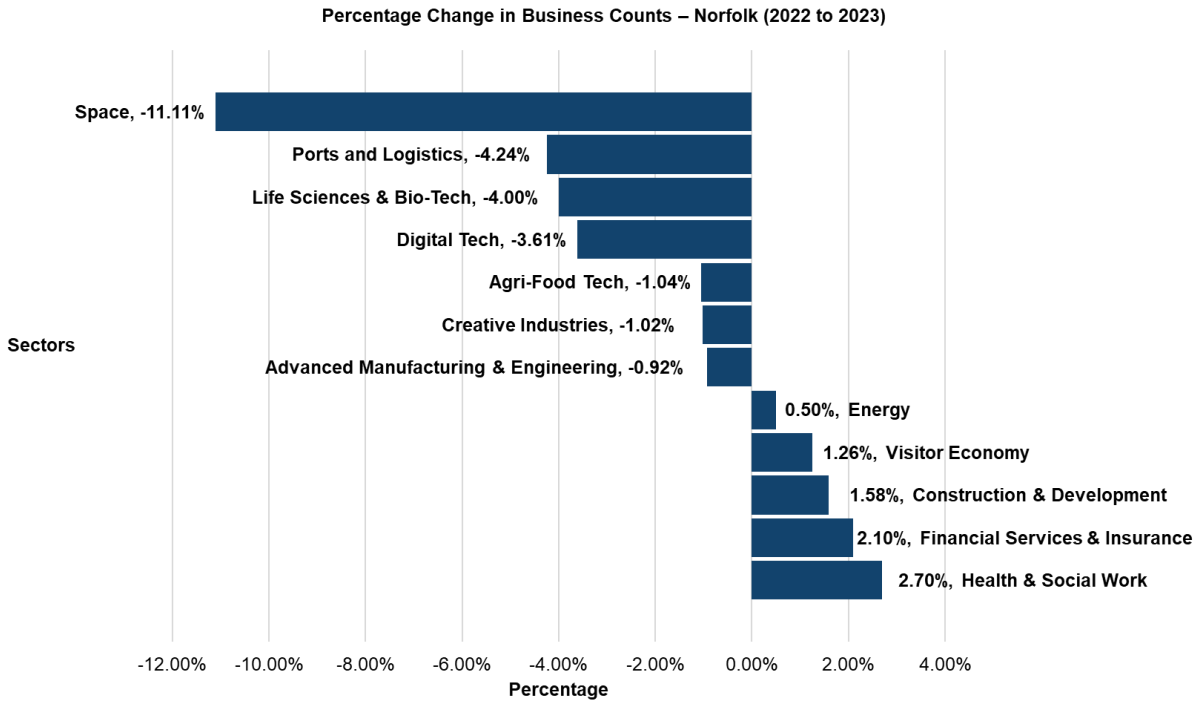
The Visitor Economy sector has the highest share of business counts within the businesses in Norfolk (19.62%) and the Space sector has the smallest (0.14%).

The Health and Social Care sector demonstrated the highest increase in the business counts by 2.7% from 2022-2023, followed by Financial Services at 2.1%.

The Space sector showed the most decrease (-11.11%) in the number of businesses within Norfolk, followed by the Ports and Logistics sector at 4.24%

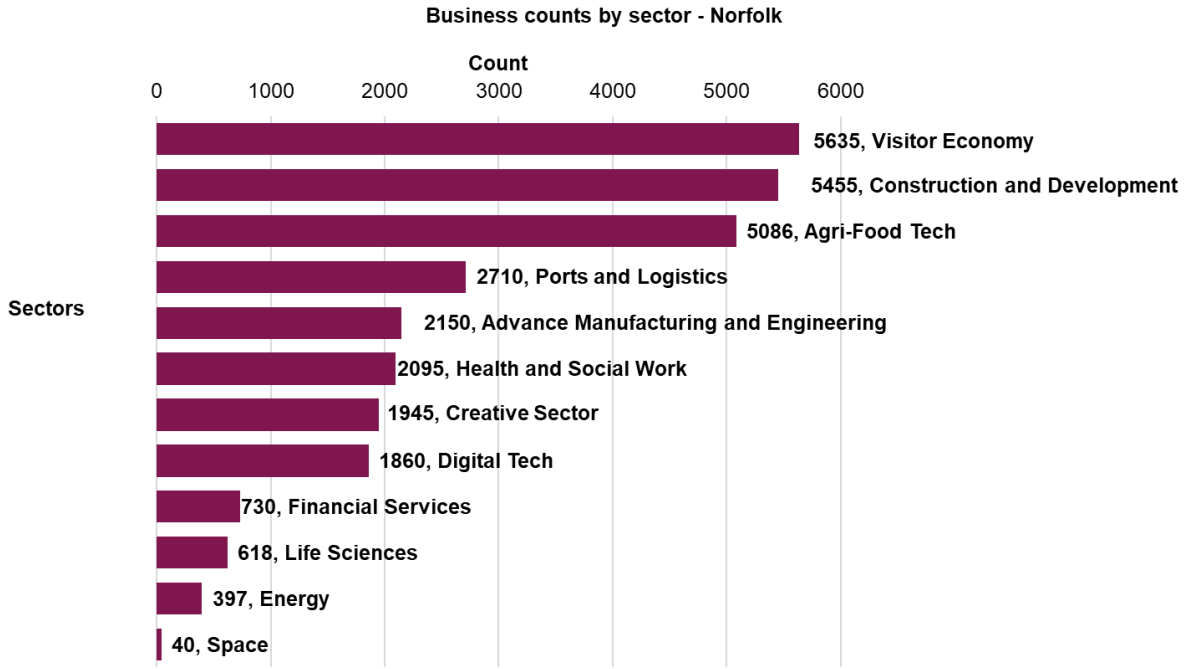
Norfolk is higher than England in the Agri-food Tech sector in the business count share by 6.09% and lower than the national figures in Digital Tech by 4.26%.

Figure 47: Percentage change in business counts in Norfolk (2022 to 2023)



Source: Nomis - Official Census and Labour Market Statistics - UK Business Counts (local units)

Figure 48: Business counts by sector in Norfolk



Source: Nomis - Official Census and Labour Market Statistics - UK Business Counts (local units)

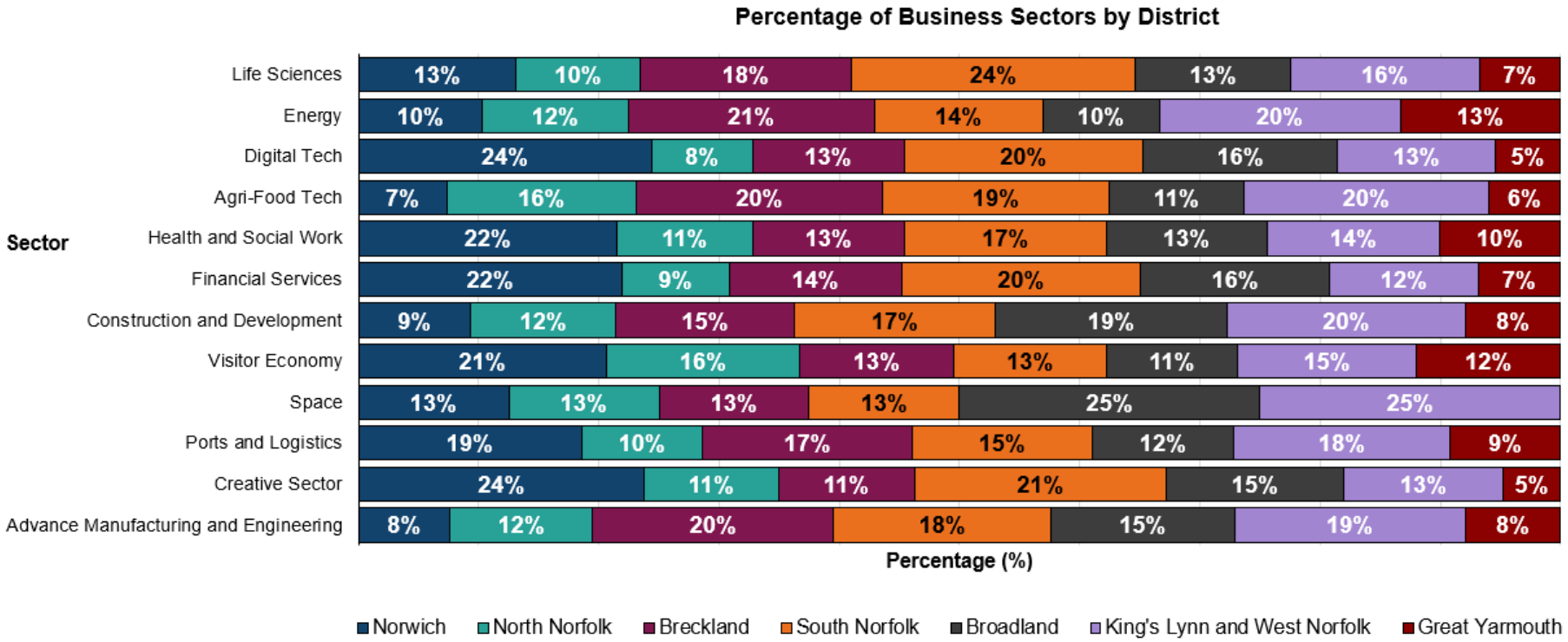
Distribution of Clusters Between Districts

King's Lynn and West Norfolk has the highest number of business units (4783), whilst Great Yarmouth has the least (2302) in 2023.

Norwich leads in the highest proportion of business units in Creative, Ports and Logistics, Visitor Economy, Financial Services, Health and Social Work and Digital Tech sectors.

Great Yarmouth has the least share of business units in Creative, Ports and Logistics, Space, Construction and Development, Agri-Food Tech, Financial Services, Health and Social Work and Digital Tech.

Figure 49: Percentage of business clusters by Norfolk district



Source: Nomis - Official Census and Labour Market Statistics - UK Business Counts (local units)

Table 12: Highest and lowest share of business units by key sectors

Key Sectors	Highest share of business units	Lowest share of business units
Advanced Manufacturing and Engineering	Breckland	Norwich
Creative Sector	Norwich	Great Yarmouth
Ports and Logistics	Norwich	Great Yarmouth
Space	Broadland	Great Yarmouth
Visitor Economy	Norwich	Broadland
Construction and Development	King's Lynn and West Norfolk	Great Yarmouth
Financial Services	Norwich	Great Yarmouth
Health and Social Work	Norwich	Great Yarmouth
Agri-Food Tech	Breckland	Great Yarmouth
Digital Tech	Norwich	Great Yarmouth
Energy	Breckland	Broadland
Life Sciences	South Norfolk	Great Yarmouth

Source: Nomis - Official Census and Labour Market Statistics - UK Business Counts (local units)

Gross Value Added (GVA)

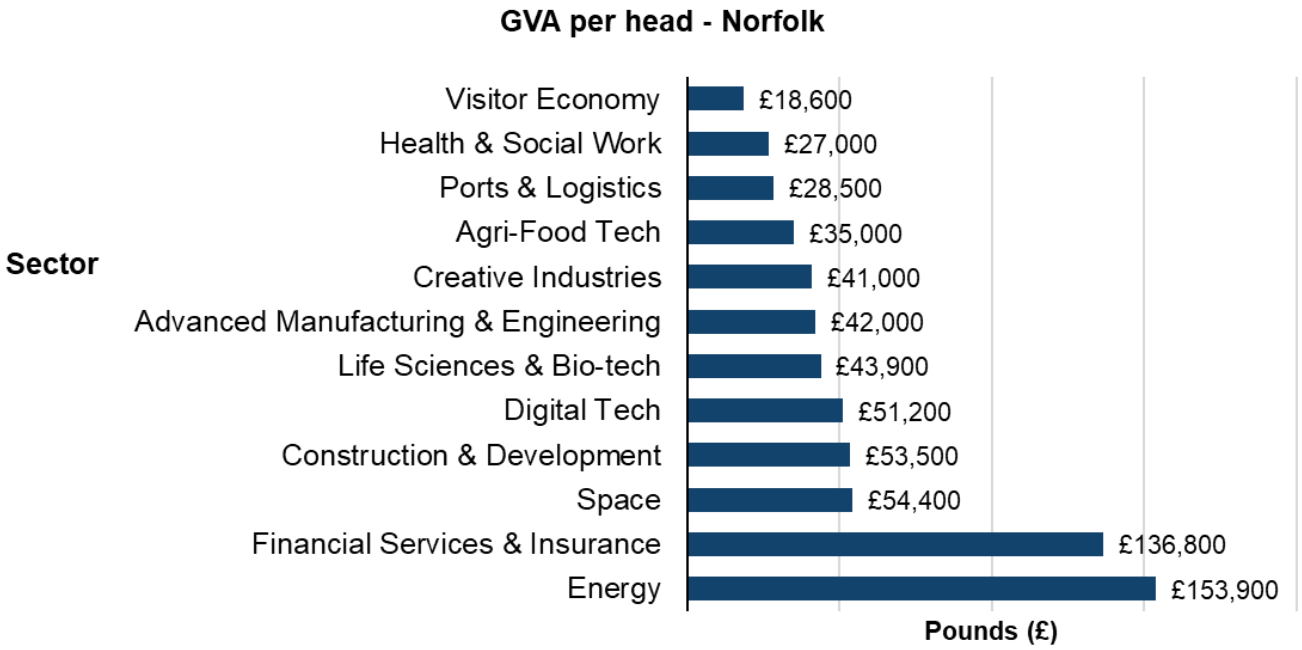
The Advanced Manufacturing and Engineering sector has the highest GVA in Norfolk (£2.00 billion) occupying a share of 17%.

The Space sector occupies the least GVA share with a value of £0.03 billion.

The GVA per head (calculated by GVA per number of jobs) is the highest in the Energy sector (£153,900), closely followed by Financial Services and Insurance sector (£136,800).

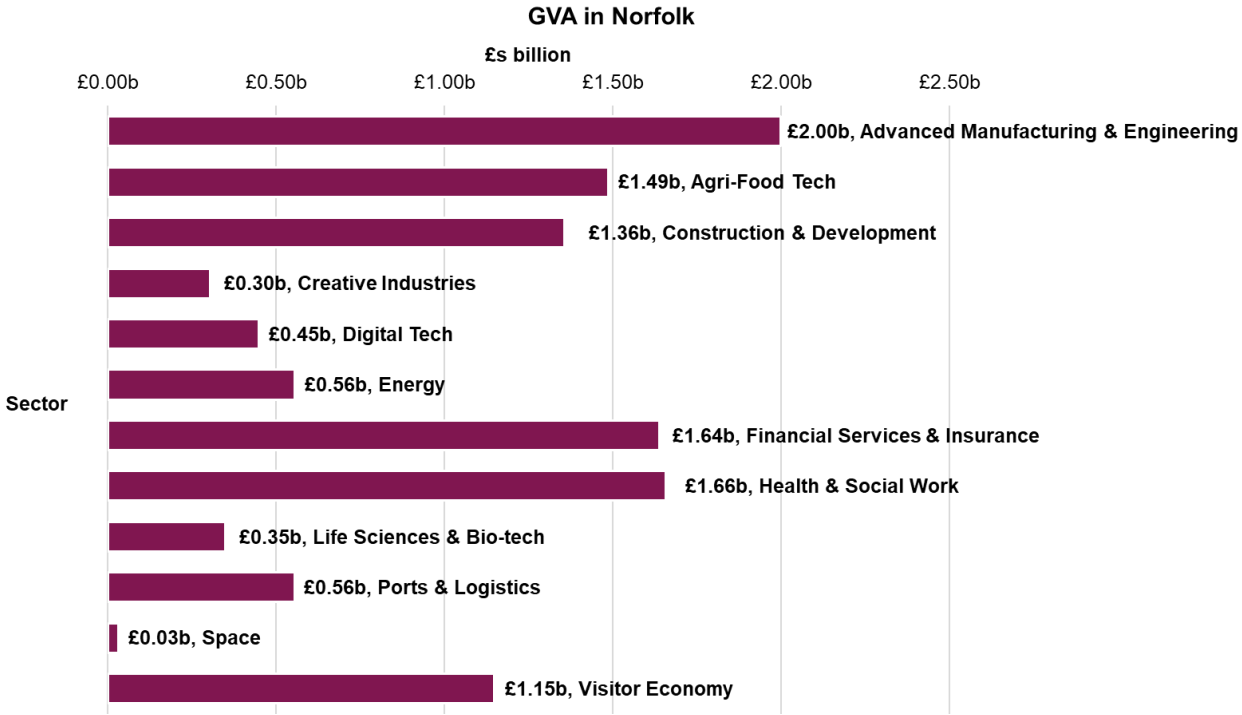
The GVA per head is least in the Visitor Economy sector with a value of £18,600.

Figure 50: GVA per head in Norfolk



Source: Lightcast (2023)

Figure 51: GVA in Norfolk



Source: Lightcast (2023)

Jobs and Average Wages

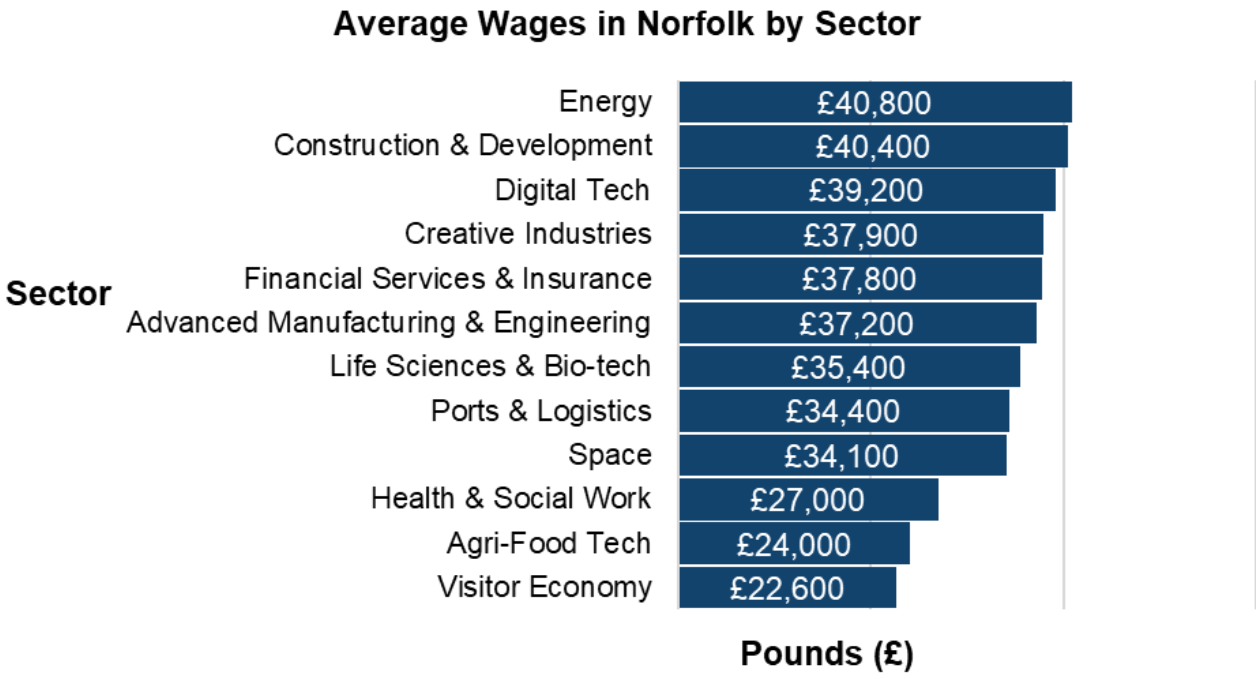
As outlined in Figures 52 and 53, the Energy sector provides the highest average wages (£40,800) among the key sectors, followed by Construction and Development (£40,400). The Energy sector also has one of the lowest jobs available in Norfolk (3,611 jobs).

The Visitor Economy sector has the lowest average wages in Norfolk (£22,600) but also has the highest number of jobs (61,842 jobs).

The Space sector has the lowest number of jobs available in Norfolk (595), with an average wage of £34,100.

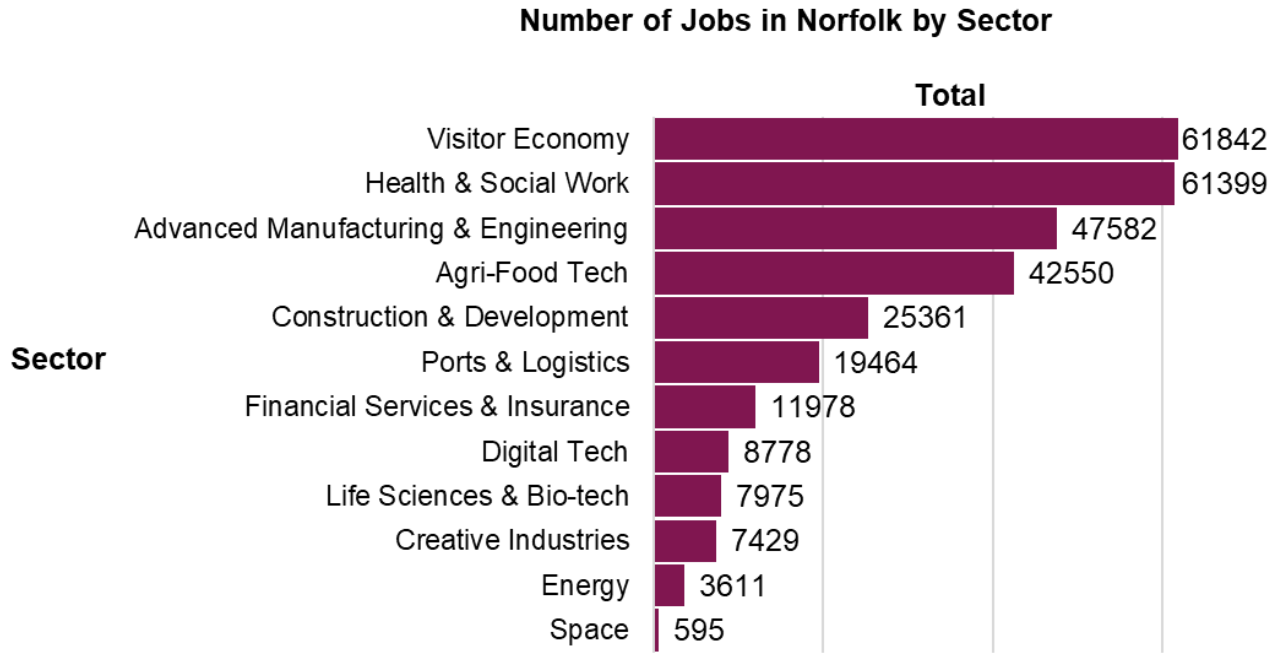
The Visitor Economy, Agri-food Tech and Health and Social Work sectors demonstrates an inverse relationship between the number of jobs and the average wages for the jobs.

Figure 52: Average wages in Norfolk



Source: Lightcast

Figure 53: Number of jobs in Norfolk



Source: Lightcast

Location Quotient and Competitive Effect

A **location quotient (LQ)** is an analytical statistic that measures a region's industrial specialisation relative to a larger geographic unit. It is a ratio that compares the concentration of a particular industry or sector in a region to the national average. A LQ greater than 1 indicates that the industry has a higher concentration in the region than nationally, suggesting specialisation.

Competitive effect indicates how much of the job change within a given region is the result of some unique competitive advantage of the region. A positive competitive effect suggests that the region has some competitive edge or unique factors driving job growth beyond national or industry trends.

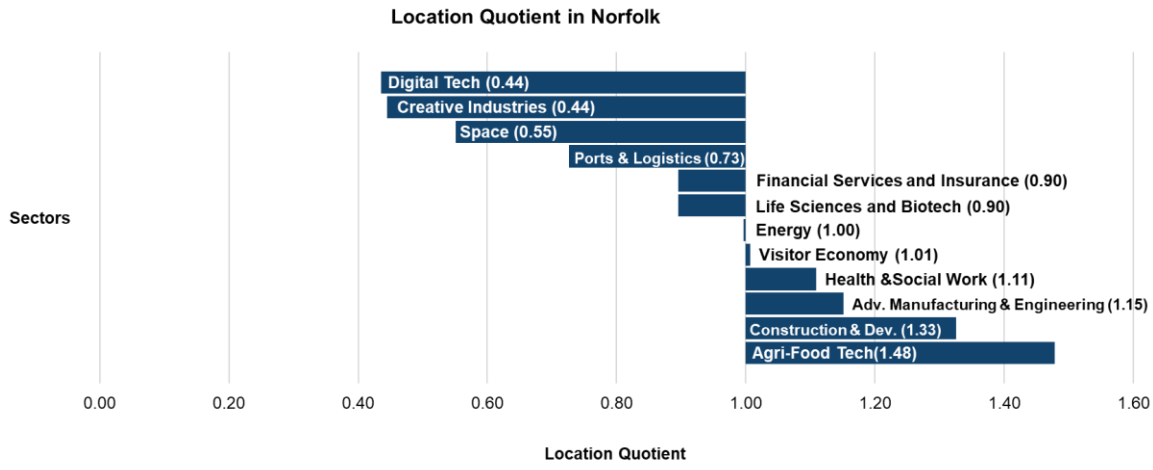
The Agri-Food Tech sector has the highest location quotient (1.48) followed by Construction and Development sector (1.33) in Norfolk.

The Digital-Tech sector has the lowest LQ (0.44) indicating the lack of specialisation in the industry in Norfolk.

The Visitor Economy sector has the highest competitive edge among the key sectors. Meanwhile the Ports and Logistics sector has the lowest competitive effect in Norfolk.

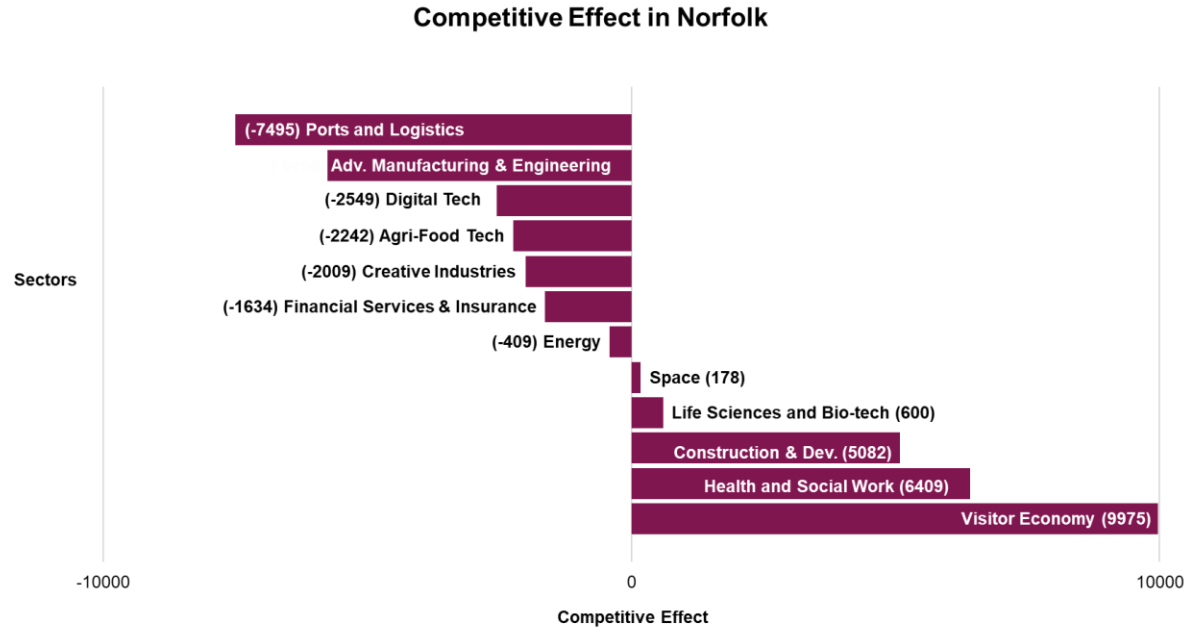
The Digital-Tech and Ports and Logistics sectors demonstrated low LQ and competitive effect, showcasing the need for specialisation and improving the factors for job growth.

Figure 54: Location Quotient in Norfolk



Source: Lightcast

Figure 55: Competitive Effect in Norfolk



Source: Lightcast

Percentage Change in Jobs and Job Forecast

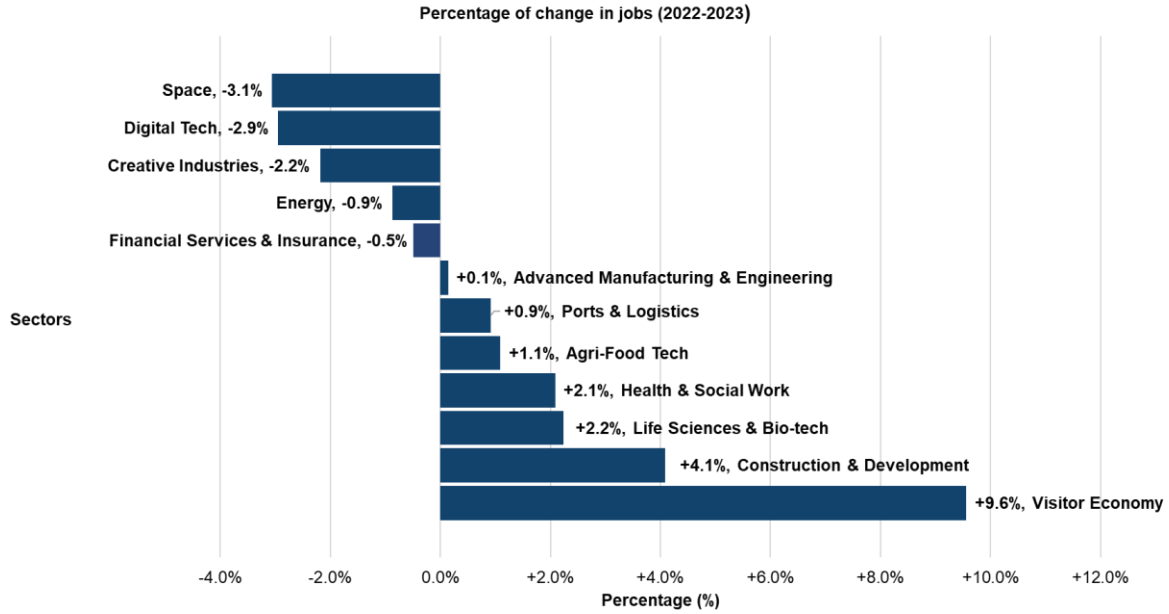
The Visitor Economy sector has the highest percentage increase in the number of jobs among the key sectors (+9.6%), followed by Construction and Development (+4.1%) from 2022-2023.

Space (-3.1%) and Digital-Tech (-2.9%) sectors faced the highest decline in the number of jobs from 2022 to 2023.

The Construction and Development (+12.7%) sector has the highest forecasted percentage increase in the number of jobs among the key sectors, followed by Visitor Economy sector (+12.4%) for the period of 2023 to 2033.

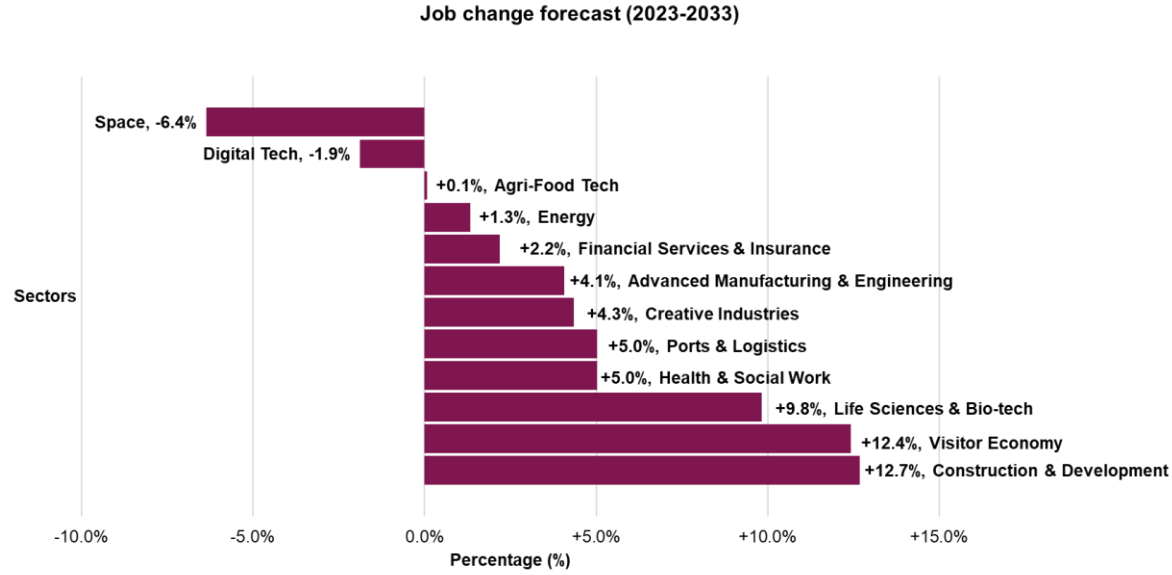
Space and Digital-Tech sectors has the most decline in the percentage of forecasted jobs from 2023 to 2033.

Figure 56: Percentage of change in jobs (2022-23)



Source: Lightcast

Figure 57: Job change forecast (2023-2033)



Source: Lightcast

Norfolk Business – Sectors

Figure 58 below shows the proportion of businesses by sector in 2023. A full breakdown of the percentages of each sector for Norfolk, East of England and England is provided in Table 13. Of the 39,765 businesses in Norfolk, 13.7% are in Construction, 10.9% are in the Professional, Scientific and Technical sector, and 9.8% are in Retail.

Compared to England, Norfolk has a slightly higher proportion of businesses in Construction (13.7% compared to 12.4%), Agriculture, Forestry and Fishing' (7.8% compared to 3.5%), and Accommodation and Food Services (7.8% compared to 6.9%).

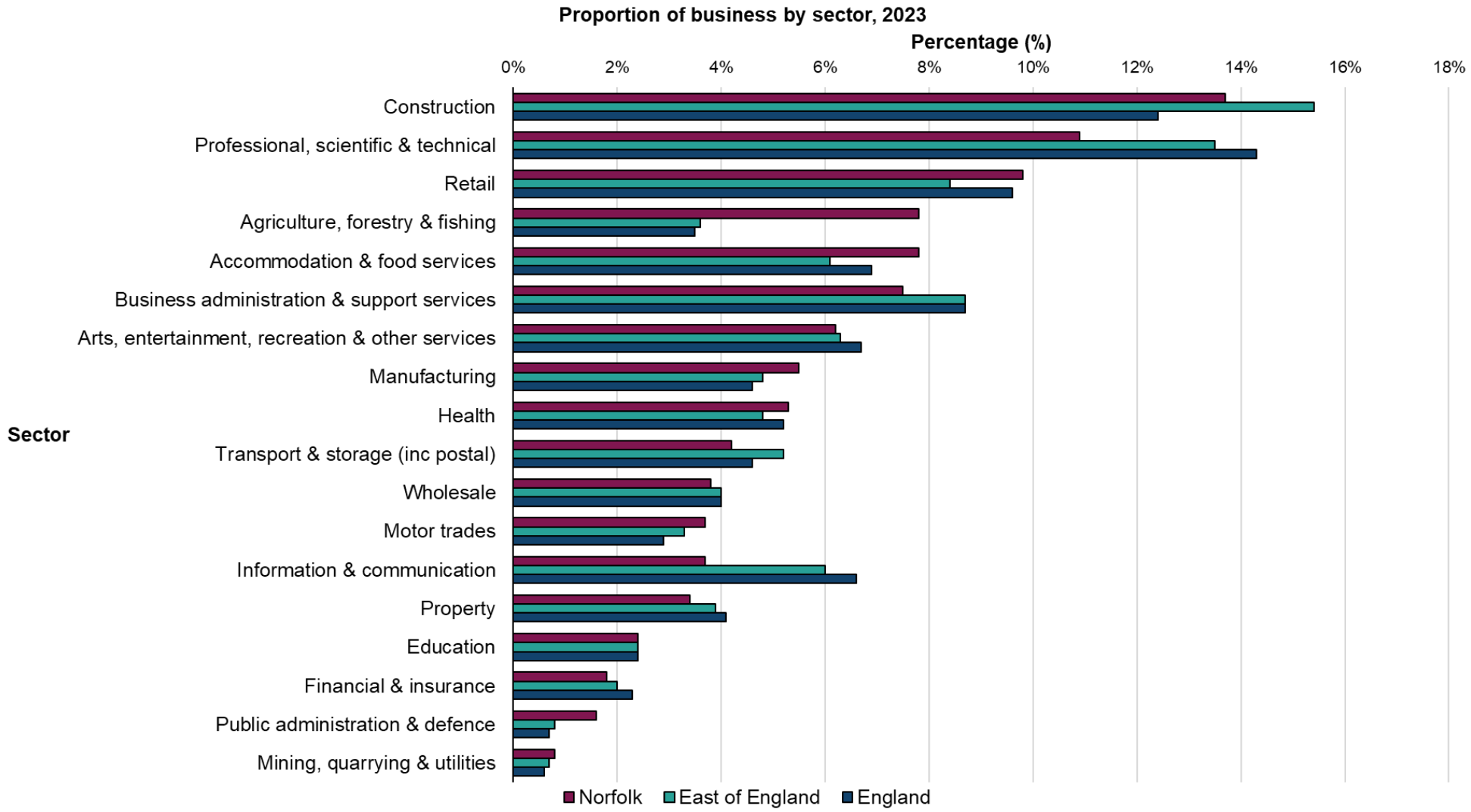
Norfolk has a lower proportion of Professional, Scientific & Technical businesses than England (10.9% compared to 14.3%).

Table 13: Percentage of businesses by sector (2023)

Sector	Norfolk	East of England	England
Construction	13.7%	15.4%	12.4%
Professional, scientific & technical	10.9%	13.5%	14.3%
Retail	9.8%	8.4%	9.6%
Agriculture, forestry & fishing	7.8%	3.6%	3.5%
Accommodation & food services	7.8%	6.1%	6.9%
Business administration & support services	7.5%	8.7%	8.7%
Arts, entertainment, recreation & other services	6.2%	6.3%	6.7%
Manufacturing	5.5%	4.8%	4.6%
Health	5.3%	4.8%	5.2%
Transport & storage (inc postal)	4.2%	5.2%	4.6%
Wholesale	3.8%	4.0%	4.0%
Motor trades	3.7%	3.3%	2.9%
Information & communication	3.7%	6.0%	6.6%
Property	3.4%	3.9%	4.1%
Education	2.4%	2.4%	2.4%
Financial & insurance	1.8%	2.0%	2.3%
Public administration & defence	1.6%	0.8%	0.7%
Mining, quarrying & utilities	0.8%	0.7%	0.6%

Source: Nomis - Official Census and Labour Market Statistics – UK Business Counts (local units and enterprises)

Figure 58: Proportion of businesses by sector (2023)



Source: [Nomis - Official Census and Labour Market Statistics – UK Business Counts (local units and enterprises)]

Norfolk's Tourism Sector

2022 saw over 50 million trips to Norfolk.

Norfolk's visitor economy grew 44% in 2022 (compared to 2021).

The total value of trips in the tourism sector is now £3.4 billion, which is roughly the same as the total value in 2019.

The volume of day trips in 2022 increased by 63% from 2021 in Norfolk, with the overall number of day trippers slightly up compared to 2019. This figure is also higher in key tourist destinations, such as North Norfolk and Great Yarmouth.

As of 2021, it was estimated that the tourism sector provides £2.3 billion of Gross Value Added (GVA) to Norfolk's economy.

Table 14: Economic impact of tourism

Impact Type	2019	2021	2022	Year-on-year comparison 2022 v 2021	Pre-pandemic levels 2022 v 2019
Number of day trips	48,835,000	29,625,000	48,376,000	63%	-1%
Average spend per day trip	£34.17	£36.24	£33.57	-5.70%	1.80%
Value of day trips	£1,639,298	£1,073,614,000	£1,652,996,000	54%	1%
Number of overnight trips	3,164,000	2,348,000	2,984,000	27%	-6%
Average spend per overnight trip	£240.00	£217.21	£243.46	12.10%	1.40%
Value of overnight trips	£759,354,000	£510,004,000	£726,489,000	42%	-4%
Number of nights	12,642,000	8,727,000	11,758,000	35%	-7%
Average spend per night	£60.07	£58.44	£61.79	5.70%	2.90%
Average length stay (nights per trip)	4	3.72	3.94	6.00%	-1.40%

Table 15: Total value of trips in the tourism sector and number of jobs 2019-2022

Year	Total value of trips in the tourism sector	Number of Actual Jobs
2019	£3,423,350,428	69,266
2021	£2,344,331,720	50,777
2022	£3,366,027,493	68,066

Source: Economic Impact of Tourism – Norfolk Report 2022

In 2022, the total value of trips in the tourism sector was 44% greater than in 2021 but 2% smaller than in 2019.

In terms of the number of jobs in the tourism sector, in 2022 this figure was 34% higher than in 2021 but 2% lower when compared to 2019.

The Economy of Norwich

Economic geography

Jobs are dispersed across the area with several distinct clusters – the Norfolk and Norwich Hospital, Research Park, Norwich Airport, Vulcan Road, Roundtree Way and Broadland Business Park. However, economic growth is highly concentrated with the Research Park, Norfolk and Norwich Hospital and Roundtree Way acting as focal points.

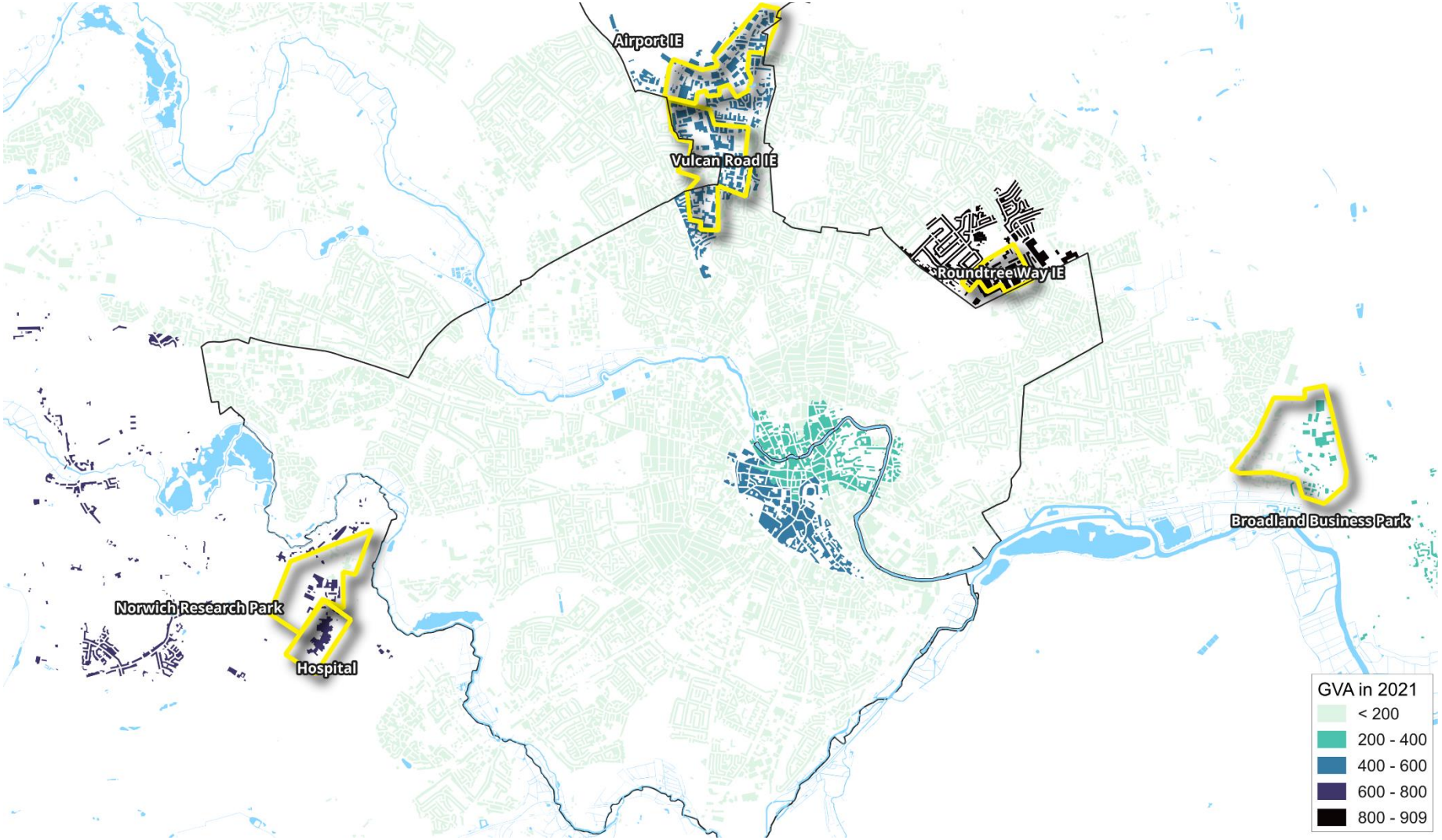
City centre

The city centre is underperforming with a risk of ‘hollowing out’ due to the significant decline in employment (circa 3,000 – 4,000 from 2018 – 2022) in certain areas. This decline has been caused by the loss of higher-value knowledge intensive jobs and national retail trends. There is currently a limited development pipeline to mitigate against this decline in employment.

Figure 59, based on data from 2021, shows that Norwich has six distinct clusters of economic growth. The highest cluster of growth with between 800 – 909 GVA is Roundtree Way, followed by the Norfolk and Norwich Hospital and Norwich Research Park (both with GVA between 600 – 800), then the International Airport and Vulcan Road (both with GVA between 400 – 600) and the Broadland Business Park (200 – 400).

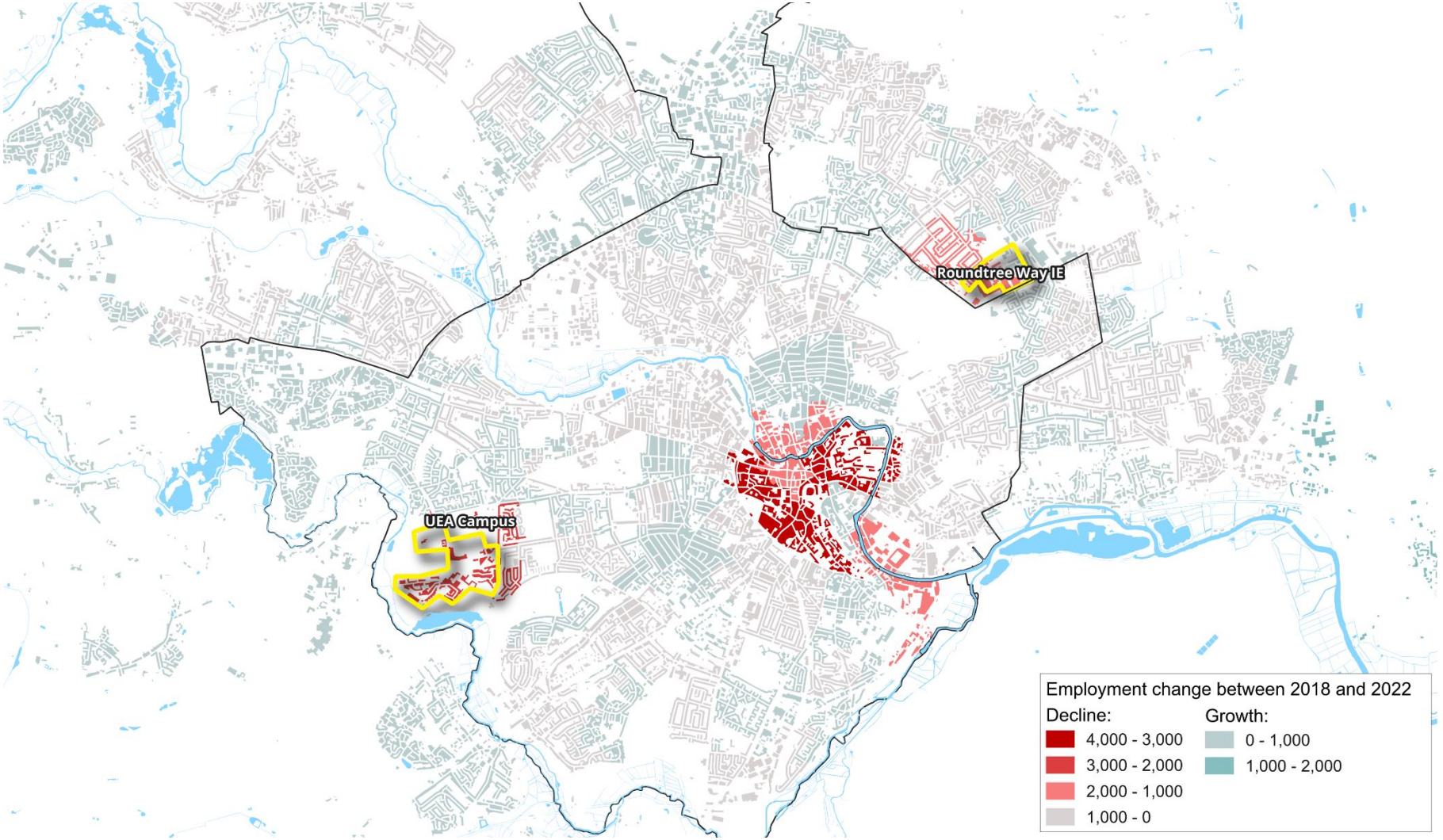
Figure 60, based on data from 2018 – 2022, shows a significant decline in employment at the UEA campus (between 3000 – 4000 people) and Roundtree Way (between 1000 – 2000 people). A significant decline in employment is also evident within the centre of the city.

Figure 59: Economic geography - Map of Norwich showing distinct clusters of economic growth



Source: Partnering Regeneration Development Ltd (PRD)

Figure 60: Map of Norwich showing employment change between 2018 and 2022



Source: Partnering Regeneration Development Ltd (PRD)

Ranking Norwich against comparable cities

Norwich's Economy (Comparative Perspective):

Norwich is ranked across a number of business, economy and place metrics against other comparable cities (Cambridge, Oxford, Peterborough, Colchester, Lincoln, York and Ipswich) as well as the English and wider Norfolk average. Included in the data set are both Norwich (City) – encompassing the central area of the city administered by the city council – and the wider Norwich urban area.

While Norwich ranks comparatively well in business change (13.2% and is behind only to Ipswich and Peterborough) and is mid-ranking in population change (4.3%), it lags behind the other cities for the remaining metrics. It ranks last for employment change (-2.3%) and GVA growth (10%), is second last for office floorspace (0.1%) and industrial floorspace (1.8%) and is fourth last for its share in the change of the knowledge economy (-2.3%).

The wider urban area consistently performs better than the city of Norwich across the range of metrics, illustrating the way the city is trailing behind the periphery in terms of growth.

Table 16: Norwich's rank across a number of business, economy and place metrics against other comparable cities and England

Rank	Business change (2015 – 2023)	Employment change (2015 – 2022)	Population change (2015 – 2022)	% Knowledge economy change (2015 – 2022)	GVA growth (2015 – 2021)	Office floorspace change (2015 – 2024)	Industrial floorspace change (2015 – 2024)
1.	Peterborough 37.6%	Cambridge 8.9%	Cambridge 10%	England National Average 12.4%	Cambridge 30%	Ipswich 25.6%	Peterborough 32.3%
2.	Ipswich 28.6%	England National Average 8.4%	Peterborough 8.7%	Cambridge 11.1%	Peterborough 29%	Cambridge 13.1%	Cambridge 18.4%
3.	Norwich 13.2%	York 6.8%	Colchester 6.1%	Oxford 9.5%	Norwich Urban Area 27.1%	Colchester 10.2%	England National Average 10.6%
4.	Colchester 12.4%	Peterborough 6.8%	Norwich Urban Area 5.3%	York 5.6%	Colchester 21%	Oxford 9.4%	Ipswich 8.1%

Rank	Business change (2015 – 2023)	Employment change (2015 – 2022)	Population change (2015 – 2022)	% Knowledge economy change (2015 – 2022)	GVA growth (2015 – 2021)	Office floorspace change (2015 – 2024)	Industrial floorspace change (2015 – 2024)
5.	England National Average 12%	Colchester 5%	Norfolk 4.8%	Colchester 4.6%	Norfolk 21%	Norwich Urban Area 4.1%	Colchester 5.5%
6.	Lincoln 8.1%	Norfolk 4.5%	Norwich 4.3%	Norfolk 0.7%	England National Average 19%	Norfolk 4.1%	York 4.5%
7.	Oxford 7.2%	Norwich Urban Area 3%	England National Average 4.2%	Norwich Urban Area -0.4%	Ipswich 17%	England National Average 2.7%	Norwich Urban Area 3.3%
8.	York 6.1%	Lincoln 3.6%	Oxford 3.2%	Norwich -2.3%	Oxford 14%	Lincoln 1.8%	Norfolk 2.5%
9.	Norfolk 6%	Ipswich 2.9%	Lincoln 3.1%	Ipswich -4.7%	Lincoln 12%	Peterborough 1.4%	Lincoln 2%
10.	Cambridge 5.9%	Oxford 1.7%	York 0.7%	Peterborough -11.3%	York 11%	Norwich 0.1%	Norwich 1.8%
11.	Not Applicable	Norwich -2.3%	Ipswich -0.3%	Lincoln -21.2%	Norwich 10%	York -10%	Oxford 0.8%

Source: Partnering Regeneration Development Ltd (PRD)

Sector strengths for Norwich

Figure 61, based on data from 2022, illustrates sectoral challenges, opportunities and strengths in Norwich and uses the national averages for England for each sector as a base mark comparator.

‘Health’, ‘public administration’, and ‘financial, insurance & property’ are all growth sectors in England, have a significant presence in Norwich and can be regarded as strengths for the city. ‘Arts, entertainment & recreation’, ‘education’, ‘motor trades’ and ‘retail’ are unique sector strengths with their declining presence in England and their prominence in Norwich.

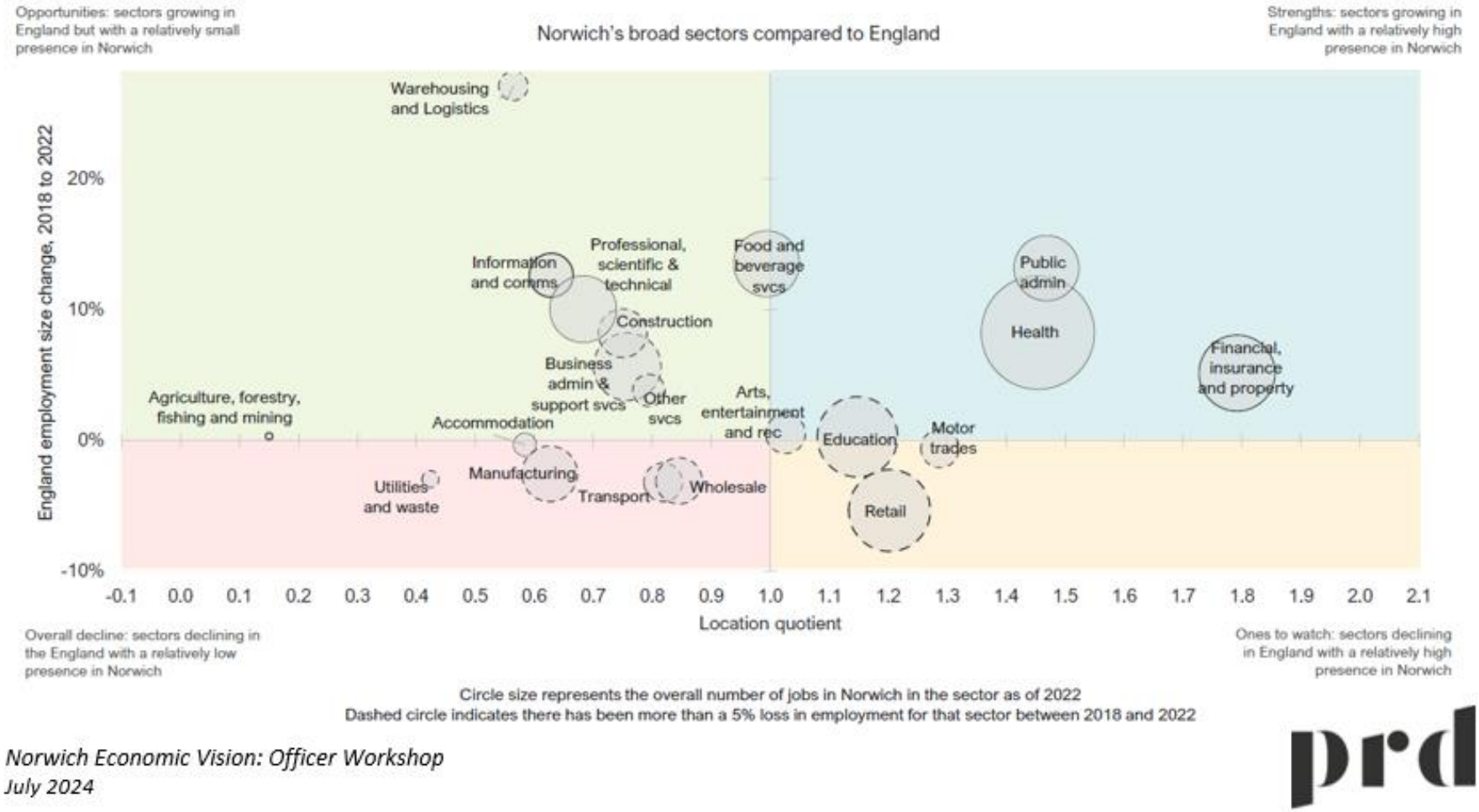
Norwich has opportunities for growth in several sectors where there is a large presence nationally but only a relatively small presence in Norwich. These sectors are ‘warehousing & logistics’, ‘information & communications’, ‘professional, scientific & technical’, ‘construction’ and ‘business administration & support services’.

‘Utilities and waste’, ‘manufacturing’, ‘transport’ and ‘wholesale’ are nationally declining sectors with a relatively low presence in Norwich.

‘Health’, ‘education’ and ‘retail’ accounted for the largest number of jobs in Norwich in 2022.

‘Education’, ‘retail’, ‘motor trades’, ‘arts, entertainment and recreation’, ‘wholesale’, ‘transport’, ‘manufacturing’, ‘other services’, ‘business administration and support services’, ‘construction’ and ‘warehousing and logistics’ all had a more than 5% reduction in employment in Norwich from 2018 – 2022.

Figure 61: Norwich's broad sectors compared to England



Source: Partnering Regeneration Development Ltd (PRD)

The Data City Explainer

The following is an explanation of the Data City platform and some of its caveats.

The Data City is an online platform which is used to gather wiser insights on business activity, focusing on emerging and innovative sectors. The platform uses an alternative to SIC-codes called ‘Real Time Industrial Classifications’ (or RTICs). These new tech-sector groupings are identified via web scraping and machine learning technology, through analysing text on businesses’ websites to understand the activity and sectors they are involved in based upon keywords and business demography.

The platform only analyses companies listed on Companies House which also have a website, making up of around 30% of the total business base, meaning that the sole proprietors or micro companies with no website are often not reflected. In total, over 5 million UK companies and 350 sectors (RTICs) and sub-sectors (sub-RTICs) are included.

However, insights deriving from Data City do come with some caveats. As the platform uses machine learning technology, some additional businesses may be picked up with others may be left out. This is particularly the case when analysing some businesses in the ‘Net Zero’ RTIC as some businesses may claim to use sustainable practices, but not necessarily in the Net Zero sector. This means that the Data City is best used for relative figures such as shares or specialisms in trying to establish what elements of emerging sectors a place may have strengths in. This is what we use it for. Data City is also best used to analyse business counts as employee and turnover figures are estimated based upon a sample of businesses. We do not recommend using the data for job numbers or turnover figures.

Any use of Data City to identify specific companies also needs careful follow up analysis. This is because the data also includes subsidiary businesses listed on Companies House in the counts. Therefore, some of the larger bubbles on the map may not represent a bunch of different businesses, but a singular business with multiple subsidiaries. Particular caution should be taken when looking at Net Zero, as businesses in the sub-sector ‘waste management and recycling’ often includes companies with a high volume of subsidiaries. For example, the two larger bubbles near Fakenham are due to Mick George Skips, which has a lot of subsidiary businesses operating in Briston to the Northeast and in West Raynham Business Park to the Southwest.

Please note tables 17 through to 24 are sourced from Data City.

Company Counts in All Districts

Table 17: Company counts in all districts.

Sector	Breckland	Broadland	Great Yarmouth	King's Lynn & West Norfolk	North Norfolk	Norwich	South Norfolk	Norfolk Total	UK	Companies Count LQ
Total	8,206	8,267	5,557	8,600	5,699	14,757	8,719	**54,851**	5,383,661	1.00
Advanced Manufacturing	39	25	23	23	19	32	40	**187**	11,598	2.21
Agri-Tech	10	10	9	13	10	4	26	**74**	1,725	3.80
Clean Energy Generation	29	39	56	13	16	28	17	**172**	7,588	2.51
Digital Technology	20	27	8	20	5	70	39	**176**	20,509	0.64
Life Sciences	24	50	35	40	25	105	73	**343**	21,896	0.72
Net Zero	94	51	67	100	69	61	121	**448**	22,960	2.69
FinTech	0	3	1	4	3	21	10	**42**	5,690	0.72

Advanced Manufacturing

Table 18: Definitions of advanced manufacturing sub sectors

Sub-RTIC	Definition
Advanced Measurement	Companies which can complete the measurement of workpieces between operations with high speed, high efficiency, high accuracy and high flexibility.
Artificial Intelligence	Companies leveraging AI and machine learning, manufacturers can improve operational efficiency, launch new products, customize product designs and plan future financial action.
Augmented and Virtual Reality	Enhancing and augmenting existing product and service design and enabling entirely new techniques using virtual worlds.
Coating Tech	Companies offering services for covering that is applied to the surface of an object, usually referred to as the substrate. The purpose of applying the coating may be decorative, functional, or both.
Computer Aided Manufacturing	Companies using software and computer-controlled machinery to automate a manufacturing process.
Cutting and Machining	Cutting is a technique where the operator moves a material (workpiece) such as metal and the tool in relation to each other in order to shape the workpiece into the desired form through shaving, drilling, etc.
Data Services	Companies using data to drive efficient and responsive production systems.
Digital Design	Digital Design, Manufacturing & Services (DDMS) is a digital-first approach to the way products are designed, manufactured and operated.

Sub-RTIC	Definition
Digital Twins	The digital twin is a virtual representation of the as-designed, as-built, and as-maintained physical product.
Forging	Forging is a manufacturing process involving the shaping of a metal through hammering, pressing, or rolling.
Forming	Forming is a mechanical process used in manufacturing industries wherein materials (mostly metals) undergo plastic deformations and acquire required shapes and sizes by application of suitable stresses such as compression, shear and tension.
Industrial IoT	The industrial internet of things (IIoT) refers to interconnected sensors, instruments, and other devices networked together with computers' industrial applications.
Moulding	A process that involves shaping a liquid or malleable raw material by using a fixed frame; known as either a mould or a matrix.
Prototyping	Companies creating early samples, models, or releases of a product built to test a concept or process.
Robotics and Automation	Robotic Process Automation, or RPA, is software that is integrated with business processes in order to automate certain activities, minimize human errors, and maximize productivity.

Agri-Tech

Table 19: Definitions of Agri-Tech sub sectors

RTIC	sub-RTIC	Definition
Agri-Tech	**AgSciences**	Companies in the field of life sciences pushing for agricultural innovation by providing specialised products or services, like GMO seeds.
Agri-Tech	**Automation**	Companies producing machinery and/or technology that enable the automation of agricultural processes.
Agri-Tech	**Drone Technology**	Companies providing drone technology, or services reliant on drone technology, to the agricultural industry.
Agri-Tech	**Management Platforms**	Companies providing software and/or platforms that enable agricultural data management and analytics.
Agri-Tech	**Precision Farming**	Set of products and/or services that enable real-time and off-field monitoring and control of agricultural processes.
Agri-Tech	**Remote Sensing**	Companies providing products that make possible agricultural monitoring off-field.
Agri-Tech	**Vertical Farming**	Companies producing the technology and related services and infrastructure that enable vertical farming.
FoodTech	**Agri Tech**	Companies offering services and technologies that aim to increase farming efficiency and sustainability.

RTIC	sub-RTIC	Definition
Net Zero	**Agritech**	Companies developing technologies and providing services transforming dominant/traditional agricultural practices.

Clean Energy Generation

Table 20: Definitions of clean energy generation sub sectors

RTIC	sub-RTIC	Definition
Energy Generation	**Bioenergy**	Companies generating energy from organic materials, such as biomass and biofuels.
Energy Generation	**Hydrogen**	Companies generating energy from hydrogen, contributing to sustainable power solutions and carbon-neutral practices.
Energy Generation	**Hydropower**	Companies generating energy from hydropower (flowing water).

RTIC	sub-RTIC	Definition
Energy Generation	**Offshore Wind**	Companies using offshore wind to produce electricity and companies engaged in the maintenance of offshore wind facilities.
Energy Generation	**Onshore Wind**	Companies using onshore wind to produce electricity.
Energy Generation	**Renewable Thermal**	Companies generating energy from sustainable heat sources, such as solar, geothermal, or biomass.
Energy Generation	**Solar**	Companies generating energy from solar sources.
Energy Generation	**Nuclear**	Companies generating energy from nuclear sources.

Digital Technology

Table 21: Definitions of digital technology sub sectors

RTIC	Definition
Artificial Intelligence	Companies working with artificial intelligence (often machine learning) in areas such as; Data Analysis, Enabling Platforms, Image Processing, Machine Learning, Natural Language Processing, Blockchain, GreenTech, Life Sciences, Industry 4.0 and Automation, Systems Optimisation, Signal Processing.
Cyber	Companies working across the cybersecurity and computer safety sector; Cryptographic Authentication, Endpoint Security, Identity Management, IoT Security, Network Security, Incident Detection and Response, Risk Management, Threat Management.
Immersive Technologies	Companies and start-ups focused on the development, manufacturing, and delivery of Immersive Technologies, including Augmented Reality, Haptics, Hardware, the Metaverse and more.
Internet of Things	Companies creating objects with the capability of communicating with each other and sharing data over the internet.
Sensors	Companies designing or deploying devices or management systems related to those devices that enable products to sense their environment and respond or create data for further analysis.
Software as a Service (SaaS)	Companies selling software subscriptions, often hosted in the cloud, either directly to consumers or to businesses.

RTIC	Definition
Software Development	Companies involved in creating, designing, and maintaining computer programs.
Wearables and Quantified Self	Companies creating or deploying wearable devices and other technologies that collect data about the wearer such as fitness and sleep and provide insight via analysis.

Life Sciences

Table 22: Definitions of life sciences sub sectors

RTIC	sub-RTIC	Definition
Life Sciences	Biology and Biotech	Companies working in the field of biology and biotechnology, may that be developing products or providing services.
Life Sciences	Chemical Products and Services	Companies working in the field of chemistry, developing products, or providing services.
Life Sciences	Environmental Sciences Products and Services	Companies that work in the field of environmental monitoring, ecology, geography and/or any sector that directly investigates the state of inhabited territories.
Life Sciences	Human Health Services	Companies providing health services
Life Sciences	Life Sciences Manufacturing	Companies that provide the technologies, products and services that enable manufacturing specialised life sciences materials.
Life Sciences	Research	Companies that base their economic activity in Life Sciences research.
Life Sciences	Synthetic Biotechnology	Companies involved in the use and development of synthetic biotechnology products in areas such as agriculture, healthcare, and environmental sustainability.
Biopharmaceutical	Not Applicable	Companies involved in the development and production of innovative medical solutions, including antibodies, vaccines, advanced therapy medicinal products (ATMPs), small molecule therapeutics, and blood and cell products.
Omics	Not Applicable	Companies aiming at the collective characterisation and quantification of biological molecules that translate into the structure, function, and dynamics of an organism.

RTIC	sub-RTIC	Definition
Pharma	Not Applicable	Companies providing new technologies and services to the pharmaceutical industry, largely in the development, testing, production, distribution, and marketing of medicines.

Net Zero

Table 23: Definitions of net zero sub sectors

Sub-RTIC	Definition
Agri-tech	Companies developing technologies and providing services transforming dominant/traditional agricultural practices.
Building Technologies	Companies providing technology and services for increased energy efficiency in buildings.
Carbon Capture	Companies dedicated to carbon capture, storage, and utilisation.
Diversion of Biodegradable Waste from Landfill	Companies focusing on landfill management.
Energy Cooperatives	Energy producers where citizens have control/ownership over the energy source.
Energy Storage	Companies providing services/technology to capture energy for use at a later time.
Green Finance	Structured financial activity that’s been created to ensure a better environmental outcome.

Sub-RTIC	Definition
Grid	Organisations dedicated to energy management and energy infrastructure development/maintenance.
Heating	Companies offering services/technology for low carbon heating.
Low Carbon Consultancy, Advisory & Offsetting Services	Businesses providing environmental consultancy are producing a service for the low carbon economy.
Low Carbon Energy Generation	Companies providing energy from low carbon sources.
Low Emission Vehicles	Companies focusing on the development of technology and infrastructure for electric vehicles.
Pollution Control and Mitigation	Companies providing services and technology for the mitigation of pollution.
Renewable Energy Planning Database	Companies captured and/or similar to those identified in the Renewable Energy Planning Database.
Renewables	Companies providing energy from renewable sources.
Waste Management and Recycling	Companies dedicated to solid waste removal, management, and processing.

FinTech

Table 24: Definitions of FinTech sub sectors

Sub-RTIC	Definition
Alternative Credit Analysis	Companies providing analytics products/services for the financial sector.
Consensus Services	Companies involved in utilising advanced technologies such as blockchain and smart contracts to transform the verification of financial agreements, enhancing trust and transparency in transaction processes.
Crypto Asset Exchange	Companies developing/providing secure and user-friendly platforms for buying, selling, and exchanging cryptocurrencies.
Digital Banks	Companies developing technologies and services that allow for the digitalisation of banking products or services.
Digital Capital Raising	Companies developing/providing novel platforms and strategies that enable efficient and accessible capital acquisition for businesses and projects.
Digital Custody	Companies dedicated to the development of digital products that provide robust and reliable solutions for safeguarding and managing digital assets.
Digital Identity	Companies supplying digital technologies aimed towards verifying identities in digital financial transactions.
Digital Lending	Companies producing digital platforms and technologies for lending services.
Digital Payments	Companies offering digital payments technologies.

Sub-RTIC	Definition
Digital Savings	Companies providing specialised cyber security services to financial institutions.
Insurtech	Companies developing specialised digital products for the insurance sector.
Regtech	Companies developing technologies that facilitate regulations and assets management.
Tech for Enterprise	Companies creating software products to financial institutions.
Wealthtech	Companies creating software products to financial institutions.

Norfolk Business Size Comparison

Norfolk shows a similar picture to its statistical neighbours overall. Micro businesses (0-9 employees) make up 88% of Norfolk businesses. This is comparable to both England as a whole and all the statistical neighbours.

Table 25: Percentage of business sizes by location

Location	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)
Norfolk	88%	10%	2%	0.3%
Lincolnshire	89%	9%	2%	0.3%
Suffolk	89%	9%	2%	0.4%
Cornwall	89%	10%	1%	0.3%
Somerset	89%	9%	1%	0.3%
East Sussex	90%	8%	1%	0.2%
East of England	90%	9%	2%	0.4%
England	89%	9%	2%	0.4%

Source: Nomis - Official Census and Labour Market Statistics – UK Business Counts (local units and enterprises)

Norfolk Business Size by District

The districts show a similar picture to Norfolk overall, with a slightly lower proportion of micro-sized businesses in Norwich. Table 26 shows a percentage breakdown of all the business sizes for each district.

As of 2023, Norfolk has a total of 39,750 businesses. King's Lynn and West Norfolk has the most businesses (6,650) followed by Norwich (6,500) and South Norfolk (6,555).

Great Yarmouth (3,520) and North Norfolk (4,980) have the least number of businesses.

Table 26: Business count and proportion of business by size for Norfolk districts, Norfolk, the East of England, and England.

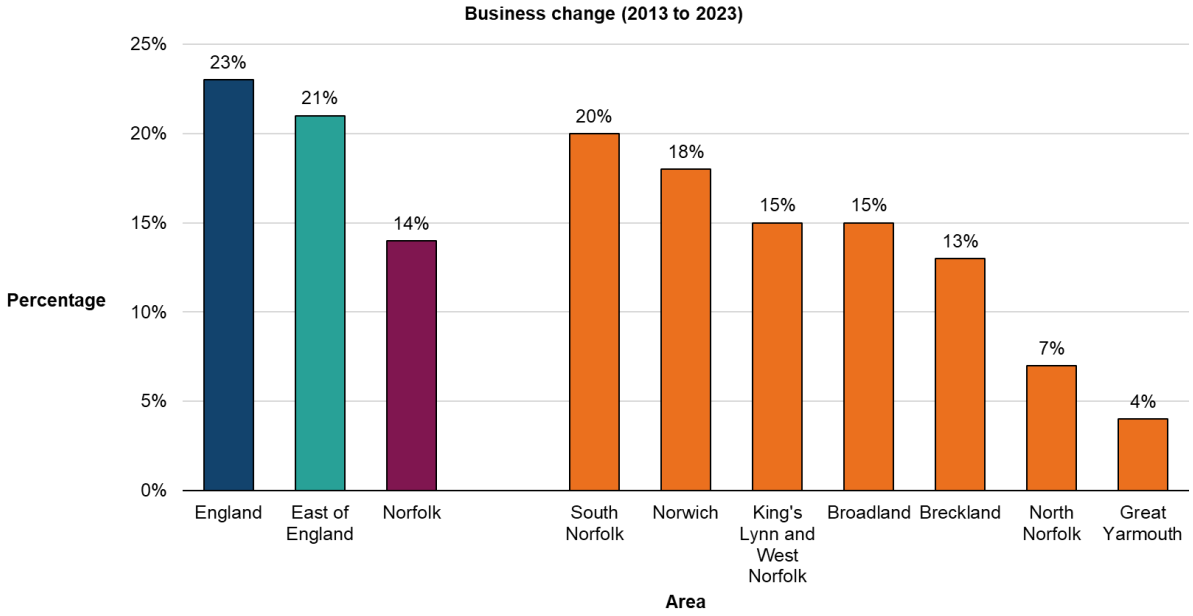
Location	Business count (2023)	Micro (0-9)	Small (10-49)	Medium (50-249)	Large (250+)
Broadland	6,080	89%	9%	1%	0.3%
Breckland	5,475	88%	9%	2%	0.4%
Great Yarmouth	3,520	87%	11%	2%	0.2%
King's Lynn and West Norfolk	6,650	89%	10%	1%	0.2%
North Norfolk	4,980	88%	11%	1%	0.1%
Norwich	6,500	84%	12%	2%	0.7%
South Norfolk	6,555	90%	8%	1%	0.3%
Norfolk	39,760	88%	10%	2%	0.3%
East of England	308,685	90%	9%	2%	0.4%
England	2,737,105	89%	9%	2%	0.4%

Source: Nomis - Official Census and Labour Market Statistics – UK Business Counts (enterprises)

Business Change

Norfolk saw less business growth at 14% compared to England (23%) and the East of England (21%). Of the districts, South Norfolk (20%) saw the largest change in the number of businesses between 2013 and 2023, while Great Yarmouth (4%) saw the smallest level of business change in the same period.

Figure 62: Business change (2013 to 2023)



Source: Nomis - Official Census and Labour Market Statistics - UK Business Counts (local units)

Business Births and Survival Rates

In 2021 in Norfolk, 3,585 new enterprises were born and 93.9% of these enterprises survived their first year of business.

1-year survival rates were similar across the board.

The 3-year survival rate (based on business births in 2019) was higher in every Norfolk district than England overall. Broadland had the highest 3-year survival rate at 65.1%.

When looking at 5-year survival rates (for business births in 2017), all Norfolk districts except for Norwich achieved better survival rates than England. The 5-year survival rate was highest in North Norfolk (50.8%) – over double the survival rate in Norwich (24.7%).

Table 27: Birth of new enterprises in Norfolk districts (2021 and 2022)

Births Of New Enterprises	2021	2022
Norfolk	3,585	3,270
Breckland	485	470
Broadland	490	445
Great Yarmouth	445	330
King's Lynn and West Norfolk	530	475
North Norfolk	390	350
Norwich	710	675
South Norfolk	535	525

Source: Business demography, UK - Office for National Statistics

Table 28: Survival of newly born enterprises (2021 business births)

Survival Of Newly Born Enterprises (2021 business births)	1-year survival
Norfolk	93.9%
Breckland	93.8%
Broadland	94.9%
Great Yarmouth	93.3%
King's Lynn and West Norfolk	94.3%
North Norfolk	96.2%
Norwich	93.0%
South Norfolk	92.5%
England	93.5%

Source: Business demography, UK - Office for National Statistics

Table 29: Survival of newly born enterprises (2019 business births) and their 1 year, 2 year, and 3 year survival

Survival Of Newly Born Enterprises (2019 business births)	1-year survival	2-year survival	3-year survival
Norfolk	94.5%	77.5%	62.5%
Breckland	93.2%	75.0%	62.5%
Broadland	96.4%	81.9%	65.1%
Great Yarmouth	95.5%	77.3%	59.1%
King's Lynn and West Norfolk	94.8%	76.0%	63.5%
North Norfolk	93.0%	77.2%	61.4%
Norwich	93.8%	77.7%	61.5%
South Norfolk	95.1%	77.5%	63.7%
England	94.7%	74.5%	55.9%

Source: Business demography, UK - Office for National Statistics

Table 30: Survival of newly born enterprises (2017 business births) 1 year, 2 year, 3 year, 4 year, and 5 year survival

Survival Of Newly Born Enterprises (2017 business births)	1-year survival	2-year survival	3-year survival	4-year survival	5-year survival
Norfolk	93.8%	76.0%	52.7%	45.3%	40.1%
Breckland	92.9%	75.5%	60.2%	52.0%	46.9%
Broadland	93.3%	62.5%	52.5%	45.8%	41.7%
Great Yarmouth	91.8%	73.8%	57.4%	49.2%	41.0%
King's Lynn and West Norfolk	95.8%	81.1%	63.2%	53.7%	49.5%
North Norfolk	96.8%	79.4%	65.1%	60.3%	50.8%
Norwich	94.0%	81.4%	34.4%	28.8%	24.7%
South Norfolk	92.8%	75.7%	63.1%	53.2%	47.7%
England	93.8%	72.6%	55.9%	45.7%	39.4%

Source: Business demography, UK - Office for National Statistics

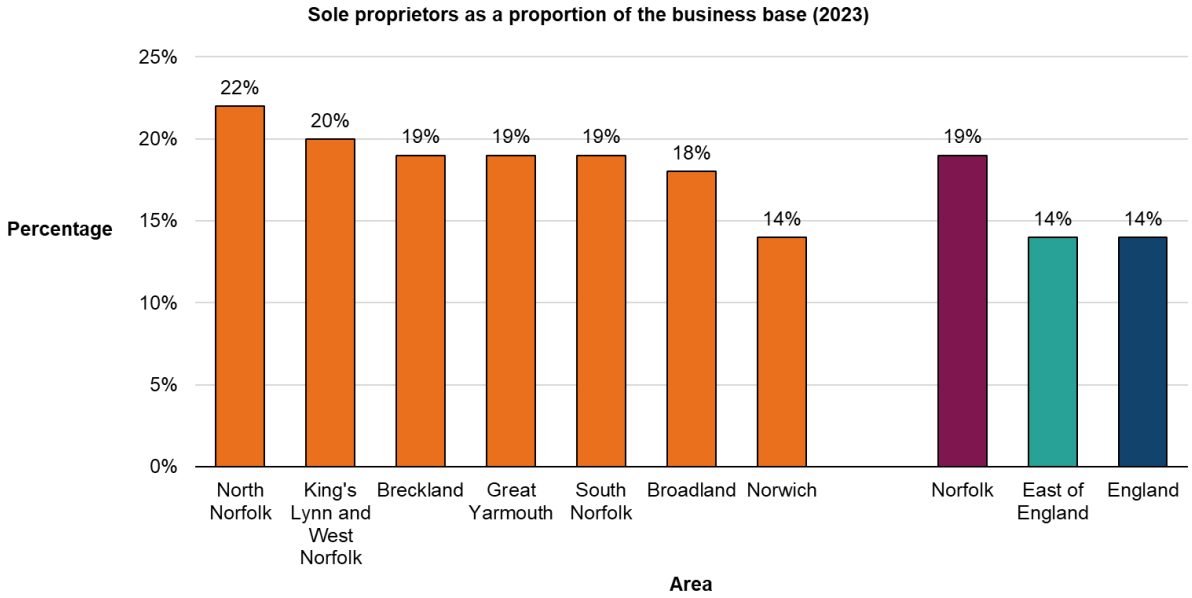
Sole Proprietors

Sole proprietor businesses account for 19% of the business base in Norfolk.

North Norfolk has 22% sole proprietors, the highest of all the districts, whereas Norwich has the lowest (14%).

All districts (except for Norwich) are higher than England (14%) and the East of England (also 14%) percentage of sole proprietors.

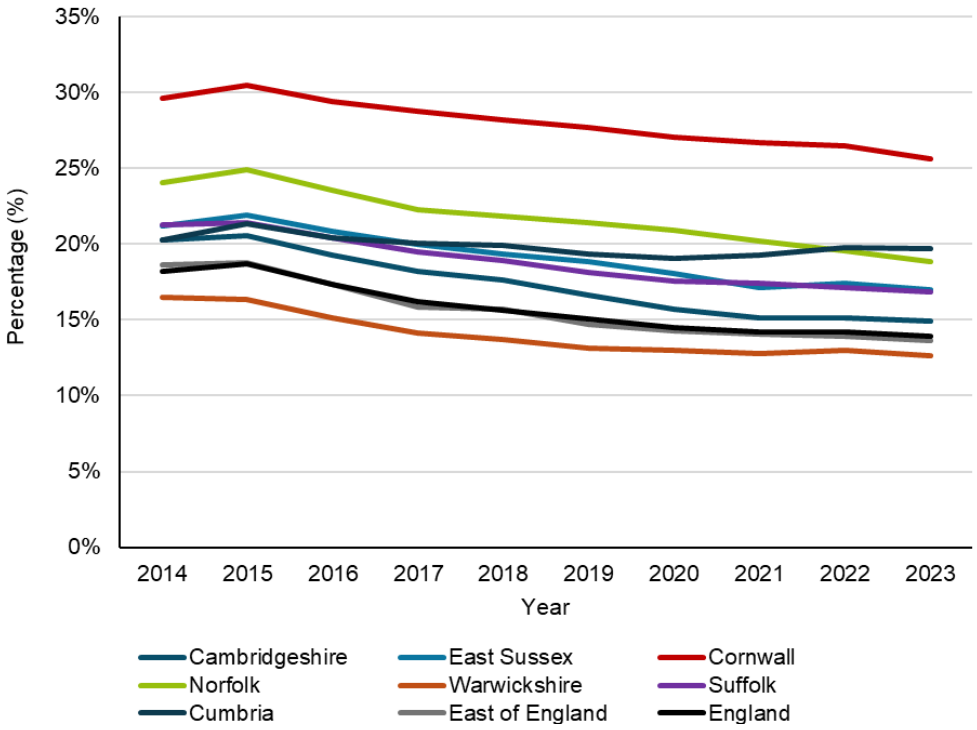
Figure 63: Percentage of sole proprietors in Norfolk districts, the East of England, and England



Source: [Nomis - Official Census and Labour Market Statistics - UK Business Counts (enterprises)]

Comparing Norfolk with its statistical neighbours (Figure 64), Cornwall has the highest percentage of sole proprietors. Norfolk is below Cornwall, but above the remaining neighbours, East of England, and England. Almost all show a slight decline in sole proprietors from 2014 to 2023.

Figure 64: Sole proprietors as a proportion of the business base (2014 to 2023)



Source: Nomis - Official Census and Labour Market Statistics - UK Business Counts (enterprises)

High Growth Enterprises

Go to the Office for National Statistics for their definition and method for calculation of High Growth Enterprises.

There are several different methods of measuring high growth. The following definition has been used for this analysis:

All enterprises with average annualised growth greater than 20% per annum, over a three-year period. Growth can be measured by the number of employees or by turnover. For this analysis growth has been measured using employment.

It is also recommended that a meaningful size threshold be set to avoid the growth of small businesses distorting any results. Eurostat have provisionally set a starting threshold of 10 employees.

In order to calculate the growth of units, it is not necessary to check the change in employee numbers or turnover from one year to the next over a three-year period. Instead, it is sufficient to compare the population of active enterprises in year xx-3 with those in year xx.

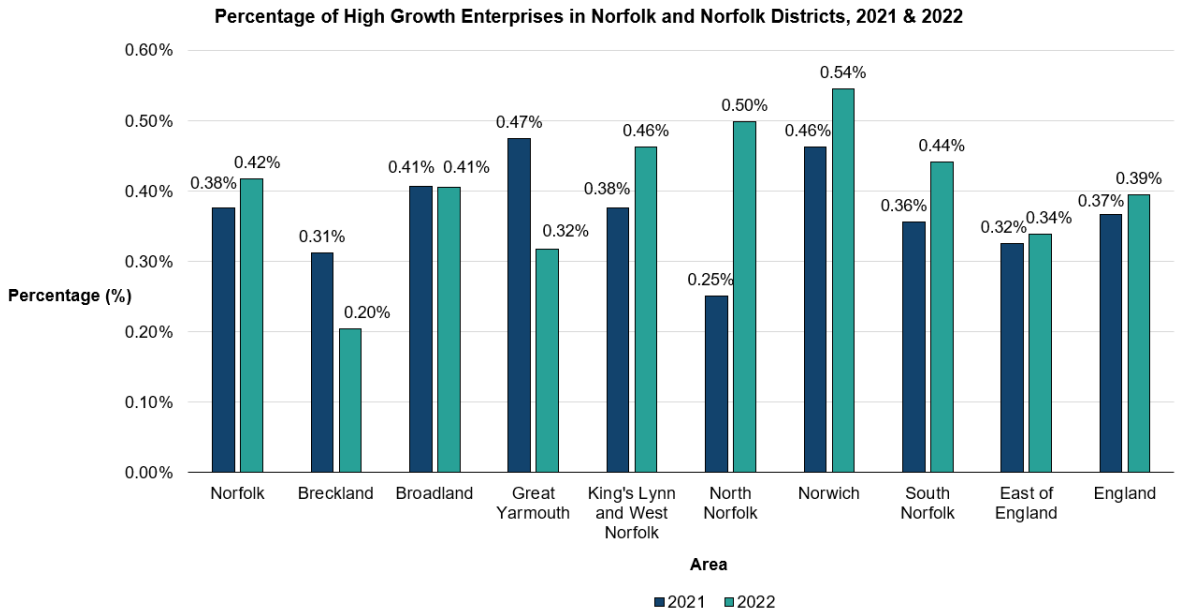
In practice, average annualised growth of 20% per annum over three years would be equal to 72.8% growth from xx-3 to year xx.

We are unable to isolate and remove all cases where data has grown due to a merger or a takeover. These cases are isolated and we do not expect them to have a big impact on the data.

In 2022, 0.42% of Norfolk's active enterprises were classed as high growth.

Norwich had the highest proportion of high growth enterprises (0.54%) and Breckland had the lowest (0.20%).

Figure 65: Percentage of high growth enterprises in Norfolk and Norfolk districts (2021 and 2022)



Source: Business demography, UK - Office for National Statistics

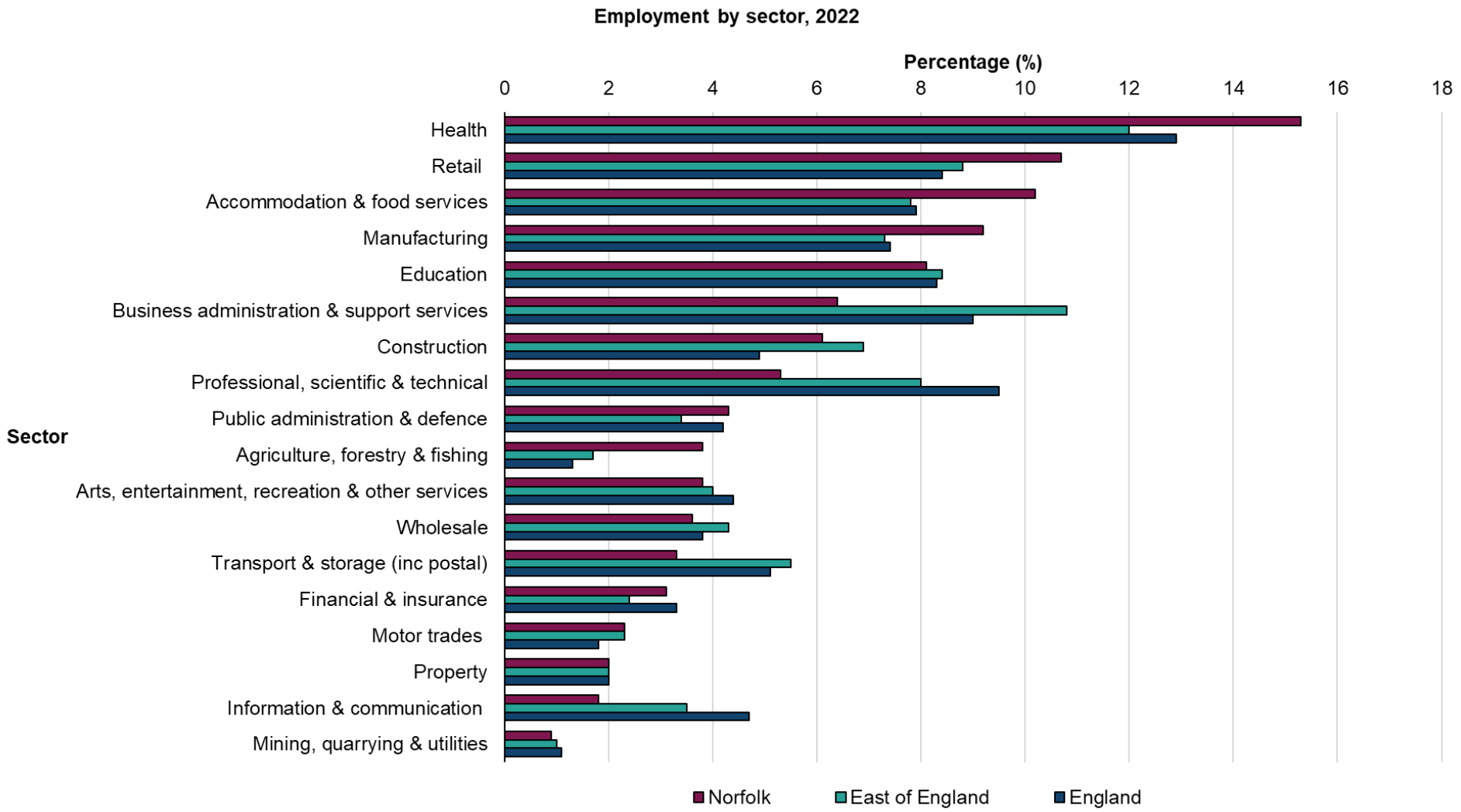
Norfolk's Employment Base and Change

Figure 66 shows the percentage of people employed in Norfolk by sector in 2022. A full breakdown of the percentages of each sector for Norfolk, East of England and England is provided in Table 31. The number of people employed in Norfolk rose from 377,000 in 2015 to 393,300 in 2022 – a 4.5% increase.

Health (15%), Retail (11%) and Accommodation & Food Services (10%) account for over a-third of the Norfolk employment base.

Table 32 shows the percentage of employment change by area between 2015 and 2022. South Norfolk was the district with the largest positive employment change between 2015 and 2022 (15.7%), followed by King's Lynn and West Norfolk (9.1%) and Broadland (8.7%).

Figure 66: Employment by sector (2022)



Source: Nomis - Official Census and Labour Market Statistics

Table 31: Percentage of employment by sector (2022)

Sector	Norfolk	East of England	England
Health	15.3%	12.0%	12.9%
Retail	10.7%	8.8%	8.4%
Accommodation & food services	10.2%	7.8%	7.9%
Manufacturing	9.2%	7.3%	7.4%
Education	8.1%	8.4%	8.3%
Business administration & support services	6.4%	10.8%	9.0%
Construction	6.1%	6.9%	4.9%
Professional, scientific & technical	5.3%	8.0%	9.5%
Public administration & defence	4.3%	3.4%	4.2%
Agriculture, forestry & fishing	3.8%	1.7%	1.3%
Arts, entertainment, recreation & other services	3.8%	4.0%	4.4%
Wholesale	3.6%	4.3%	3.8%
Transport & storage (inc postal)	3.3%	5.5%	5.1%
Financial & insurance	3.1%	2.4%	3.3%
Motor trades	2.3%	2.3%	1.8%
Property	2.0%	2.0%	2.0%
Information & communication	1.8%	3.5%	4.7%
Mining, quarrying & utilities	0.9%	1.0%	1.1%

Source: Nomis - Official Census and Labour Market Statistics

Table 32: Percentage employment change by area (2015-2022)

Location	Percentage employment change by area (2015-2022)
Norfolk	4.5%
Breckland	0.0%
Broadland	8.7%
Great Yarmouth	-2.6%
King's Lynn and West Norfolk	9.1%
North Norfolk	6.3%
Norwich	-2.3%
South Norfolk	15.7%
East of England	7.9%
England	8.4%
Lincolnshire	7.1%
Suffolk	6.4%
Cornwall	10.7%
Somerset	5.8%
East Sussex	-0.5%
Cambridgeshire & Peterborough	8.3%

Source: Nomis - Official Census and Labour Market Statistics

Investment from Innovate UK

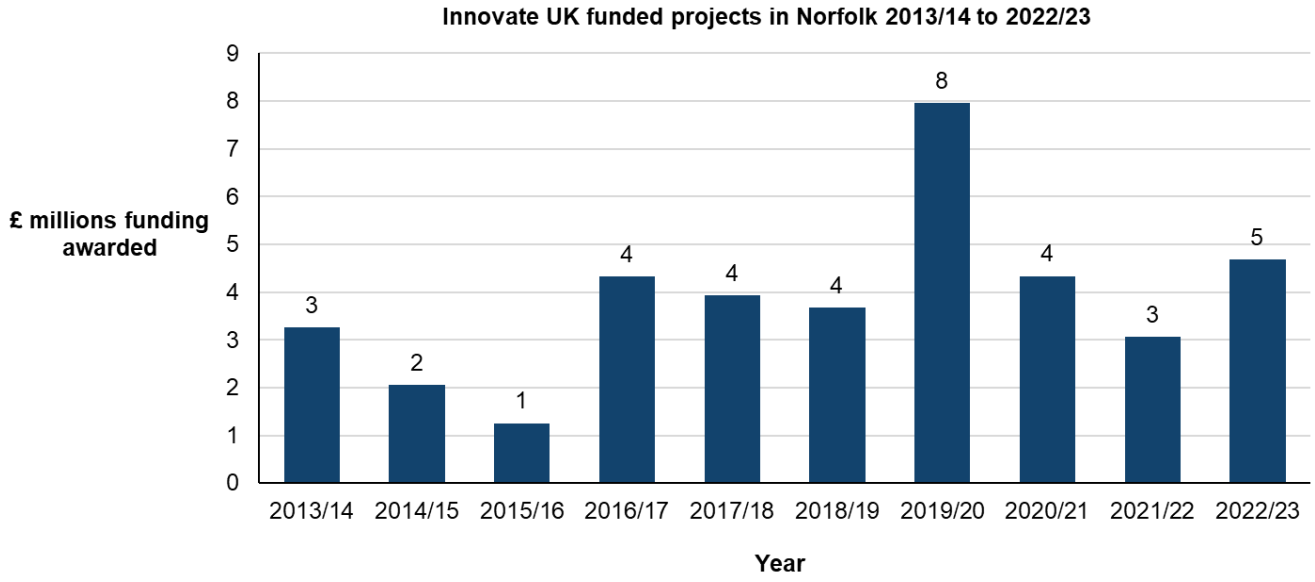
Over the ten-year period 2013/14 to 2022/23, Innovate UK has funded projects in England to the value of around £10.75 billion.

8.5% has been awarded to projects in the East of England region - of that £915 million, around 4.2% of funding has been awarded to projects in Norfolk (around £38.5 million), compared with 1.9% for Suffolk (around £17.6 million).

In the year 2022/23, Norfolk received around £4.7 million funding, which has been the highest award over the ten-year period, except for £8 million awarded in 2019/20.

Norwich has the most investment in funded projects during 2022/23, whereas Great Yarmouth had the least (£6,000). King's Lynn and West Norfolk received no funding.

Figure 67: Innovate UK funded projects in Norfolk, 2013/14 to 2022/23



Source: Innovate UK funded projects since 2004 – UKRI

Table 33: Innovate UK funded projects in Norfolk districts (2022/23)

Norfolk districts	Innovate UK funded projects, 2022/23
Breckland	£377,700
Broadland	£408,900
Great Yarmouth	£6,000
King's Lynn and West Norfolk	£0
North Norfolk	£161,500

Norfolk districts	Innovate UK funded projects, 2022/23
Norwich	£3,064,300
South Norfolk	£667,400
Norfolk Total	£4,685,800

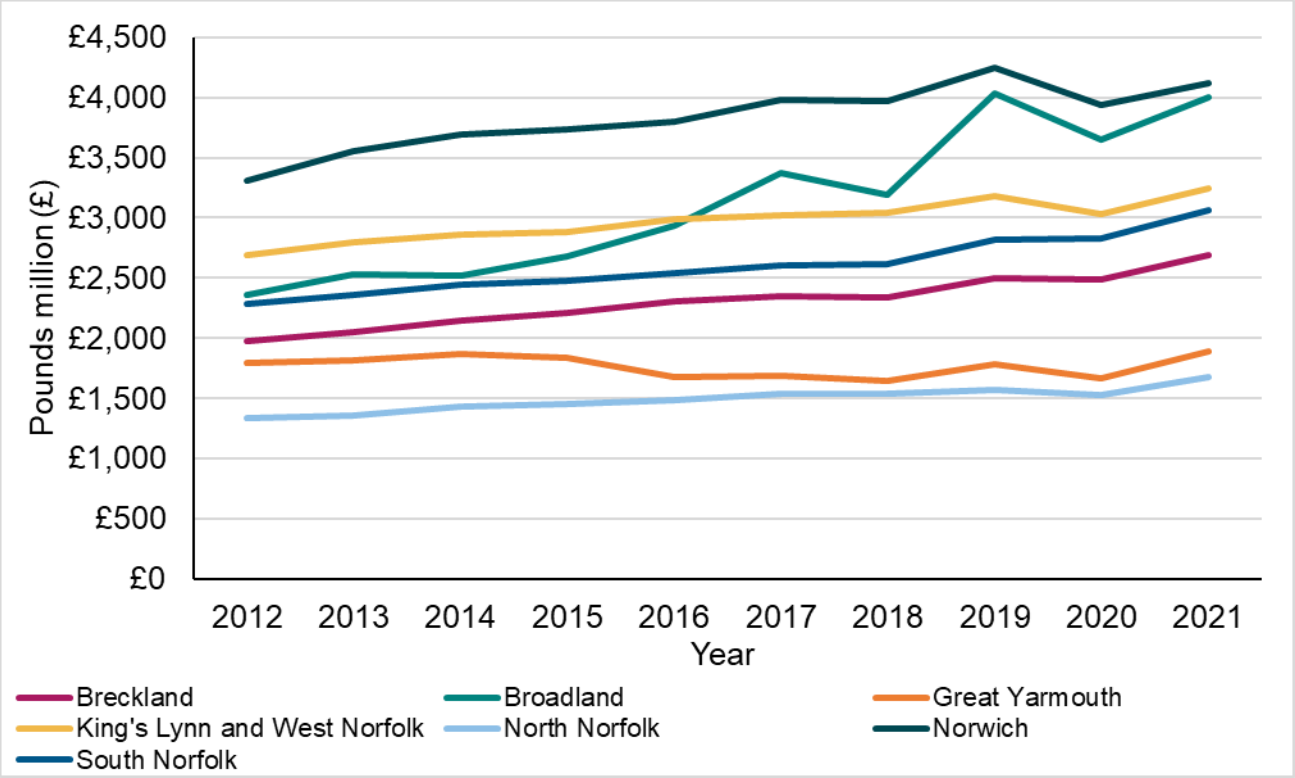
Source: Innovate UK funded projects since 2004 – UKRI

Productivity (GVA)

The Norwich and Broadland regions were responsible for over £4 billion in GVA in 2021.

Alternatively, the measure of GVA per hour worked shows that in 2020, only Broadland was more productive, on average, than the UK overall.

Figure 68: Regional Gross Value Added (balanced) by Norfolk district (2012 to 2021)



Source: Regional gross value added (balanced) by industry: local authorities by ITL1 region - Office for National Statistics

Table 34: Regional GVA (current prices, pounds million (£)) and GVA per hour worked (2020) for Norfolk districts

Location	Regional GVA (current prices, £m)	GVA per hour worked (2020)
Breckland	£2,687	£30.95
Broadland	£4,000	£47.39
Great Yarmouth	£1,888	£30.96
King's Lynn and West Norfolk	£3,241	£32.46
North Norfolk	£1,673	£25.64
Norwich	£4,116	£30.59
South Norfolk	£3,064	£31.99
UK less Extra-Regio	Not Applicable	£37.73

Source: Subregional productivity: labour productivity indices by local authority district - Office for National Statistics

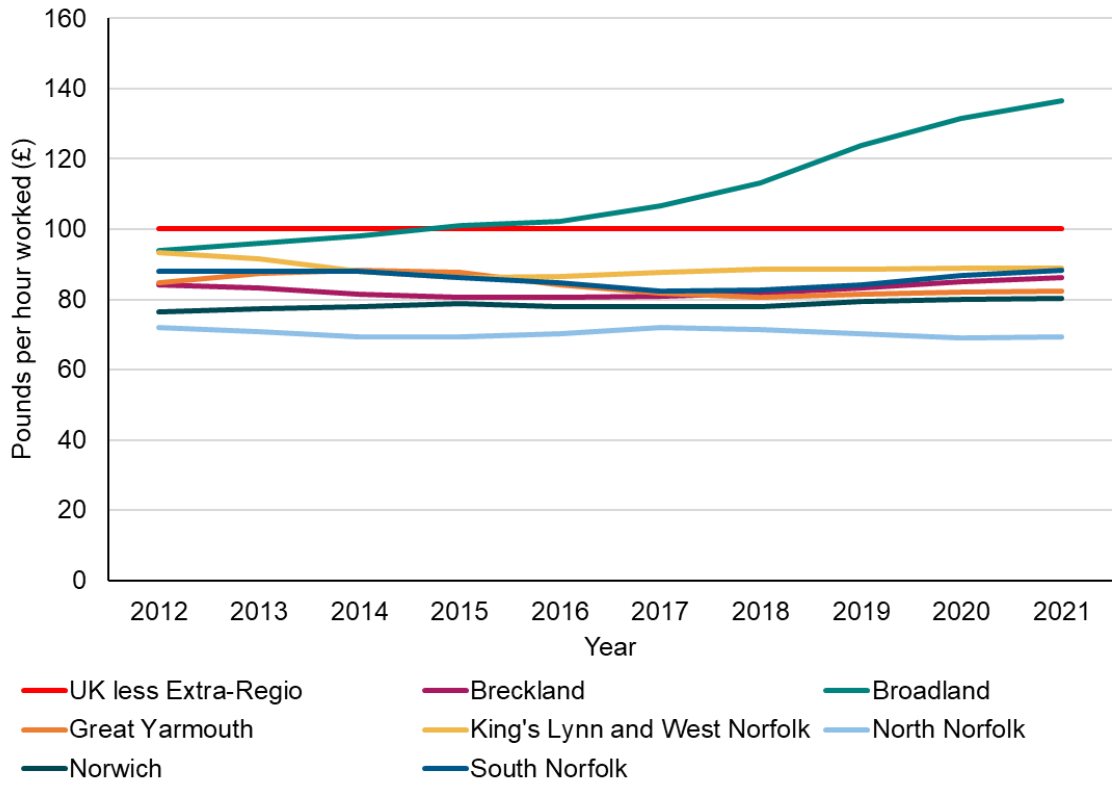
Indexed GVA per Hour Worked

With the UK indexed to 100, we can see how the Norfolk districts compare to the country in terms of GVA (pounds per hour worked) between 2012 and 2021.

Broadland saw an increase compared to the UK between 2017 and 2021, whereas all the other districts have remained below the UK index.

Some have been consistently below for the past 10 years.

Figure 69: Current price (smoothed) GVA (B) per hour worked indices for Norfolk districts (2012-2021)



Source: [Subregional productivity: labour productivity indices by local authority district - Office for National Statistics]

GVA by Sector

Table 35 shows regional gross value added (balanced) by industry for Norfolk districts, in millions. GVA was highest in Broadland (£3.9 billion) and lowest in Great Yarmouth (1.7 billion).

Manufacturing was a greater contributor in Breckland and King's Lynn and West Norfolk, whereas the Services Sector contributed more in Broadland and Norwich. Financial and Insurance Activities in Broadland are prominent while Public Administration and Defence contributed more GVA in King's Lynn and West Norfolk and Norwich. Education was higher in Norwich also. South Norfolk had higher GVA from Human Health sectors.

Table 35: Gross Value Added by industry (million pounds) for Norfolk districts

Gross value added by Industry (million pounds)	Breckland	Broadland	Great Yarmouth	King's Lynn and West Norfolk	North Norfolk	Norwich	South Norfolk
All industries	**2,589**	**3,960**	**1,715**	**3,043**	**1,588**	**3,832**	**2,702**
Production sector	758	400	345	957	319	344	368
Agriculture, mining, electricity, gas, water and waste	156	67	147	231	141	52	164
Manufacturing	602	333	198	726	178	292	204
Manufacture of food, beverages, textiles and clothing	176	113	13	262	65	47	49
Manufacture of wood, petroleum, chemicals and minerals	262	88	32	249	36	111	47
Manufacture of metals, electrical products and machinery	125	114	117	178	54	81	91
Other manufacturing, repair and installation	39	18	35	36	23	53	17
Construction	244	271	85	219	107	229	258
Construction of buildings	67	100	14	44	40	33	39
Civil engineering	71	17	14	26	16	57	60
Specialised construction activities	106	154	56	148	51	139	159
Services sector	1,587	3,288	1,285	1,867	1,162	3,259	2,077
Wholesale and retail trade; repair of motor vehicles	283	280	150	292	158	481	290
Motor trades	25	30	17	59	15	74	37
Wholesale trade	83	89	26	67	37	98	125
Retail trade	175	161	107	166	106	309	128
Transportation and storage	89	34	37	45	34	96	44
Land, water and air transport	32	8	12	21	22	40	20
Warehousing, transport support, postal and courier activities	57	26	25	24	12	56	25
Accommodation and food service activities	57	57	125	108	99	124	63
Information and communication	21	77	33	29	18	163	41
Financial and insurance activities	14	1,742	13	16	11	104	13
Real estate activities	385	481	217	460	411	475	446

Gross value added by Industry (million pounds)	Breckland	Broadland	Great Yarmouth	King's Lynn and West Norfolk	North Norfolk	Norwich	South Norfolk
Owner-occupiers' imputed rental	316	350	189	395	349	235	369
Real estate activities, excluding imputed rental	70	131	28	65	61	240	78
Professional, scientific and technical activities	93	88	89	67	43	289	109
Legal and accounting activities	24	31	10	25	13	173	33
Head offices and management consultancy	5	6	3	5	4	16	14
Architectural and engineering activities	33	18	64	13	3	31	22
Other professional, scientific and technical activities	30	33	11	24	22	69	40
Administrative and support service activities	163	78	101	112	42	219	85
Rental and leasing activities	66	21	47	34	9	27	11
Employment activities; tourism and security services	67	21	35	51	12	134	22
Services to buildings and landscape activities	16	13	4	20	9	38	20
Office administration and business support activities	12	24	15	7	12	20	32
Public administration and defence	150	78	57	229	68	441	144
Education	156	149	128	194	120	472	177
Human health and social work activities	116	171	259	263	85	241	596
Human health and residential care activities	89	151	237	252	79	194	509
Social work activities	27	20	22	11	5	46	87
Arts, entertainment and recreation	25	19	50	27	35	79	24
Other service activities	25	26	19	16	31	67	34
Membership organisations; repair of household goods	6	9	1	1	14	45	7
Other personal service activities	19	17	18	15	18	22	27

Gross value added by Industry (million pounds)	Breckland	Broadland	Great Yarmouth	King's Lynn and West Norfolk	North Norfolk	Norwich	South Norfolk
Activities of households	9	8	6	10	7	9	9

Source: TLH East of England edition from Regional gross value added (balanced) by industry: local authorities by ITL1 region - Office for National Statistics

Value of Imports and Exports

As shown in Figure 70, during the period of 2016 and 2021, the value of worldwide imports and exports for total trade of all industries increased for Norfolk – 5.8% increase for imports compared with 4.9% for the East of England, and 33.5% increase for exports compared with 30.1% for the East of England.

For 2021, the value of Norfolk's worldwide imports is £2.9 billion (representing 5.0% of the region's imports value), and the value of Norfolk's worldwide exports is £3.8 billion (representing 7.5% of the region's exports value).

Over that last year, the value of Norfolk's worldwide imports and exports are proportionately much higher than for the region and are now above pre-COVID-19 (2018) levels.

Figure 70: Worldwide imports and exports for total trade of all industries for Norfolk (2016 to 2021)

Source: International trade in UK nations, regions and cities - Office for National Statistics

Place

Key Metrics Analysis – Place

This section looks at:

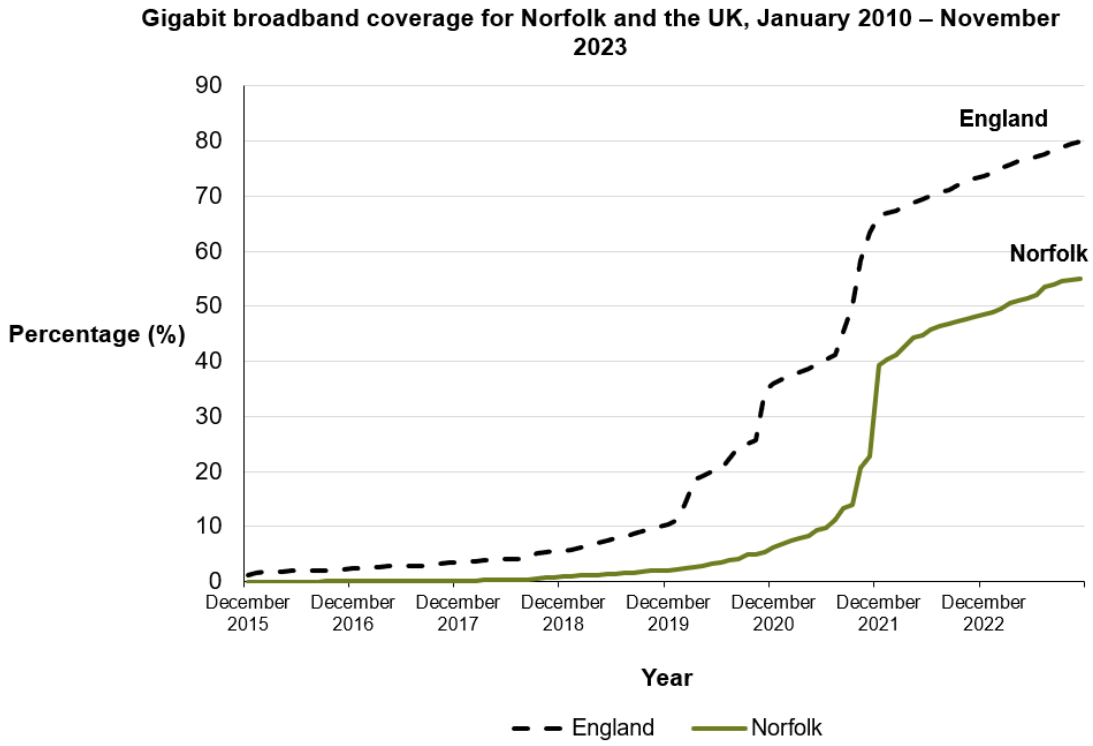
- Gigabit broadband coverage
- Ultrafast broadband coverage
- Superfast broadband coverage
- 4G coverage
- Wellbeing – life satisfaction
- Wellbeing – a worthwhile life
- Wellbeing – happiness
- Wellbeing – anxiety
- Loneliness
- Housing affordability
- House prices
- Planned housing
- Gross disposable household income (GDHI) per head
- Transport connectivity
- Access to services
- Commuting patterns
- Location of usual residence and place of work
- Emissions per km
- Emissions over time (by district)

Gigabit Broadband Coverage

In November 2023, Norfolk had 55.0% of premises with gigabit broadband, compared to England's coverage of 79.8%.

The gap between the Norfolk and England percentages remained consistent between December 2022 (25.0%) and November 2023 (24.8%).

Figure 71: Gigabit broadband coverage for Norfolk and England (January 2010 -November 2023)



Source: Broadband Coverage and Speed Test Statistics for Norfolk

Table 36: Percentage of premises with gigabit broadband by month and region for Norfolk and England

Percentage of premises with gigabit broadband by month and region	Norfolk	England
December 2022	48.6%	73.6%
January 2023	48.9%	74.3%
February 2023	49.5%	75.1%
March 2023	50.6%	75.8%
April 2023	51.1%	76.3%

Percentage of premises with gigabit broadband by month and region	Norfolk	England
May 2023	51.5%	76.6%
June 2023	52.0%	77.1%
July 2023	53.6%	77.7%
August 2023	54.0%	78.4%
September 2023	54.5%	78.9%
October 2023	54.7%	79.5%
November 2023	55.0%	79.8%

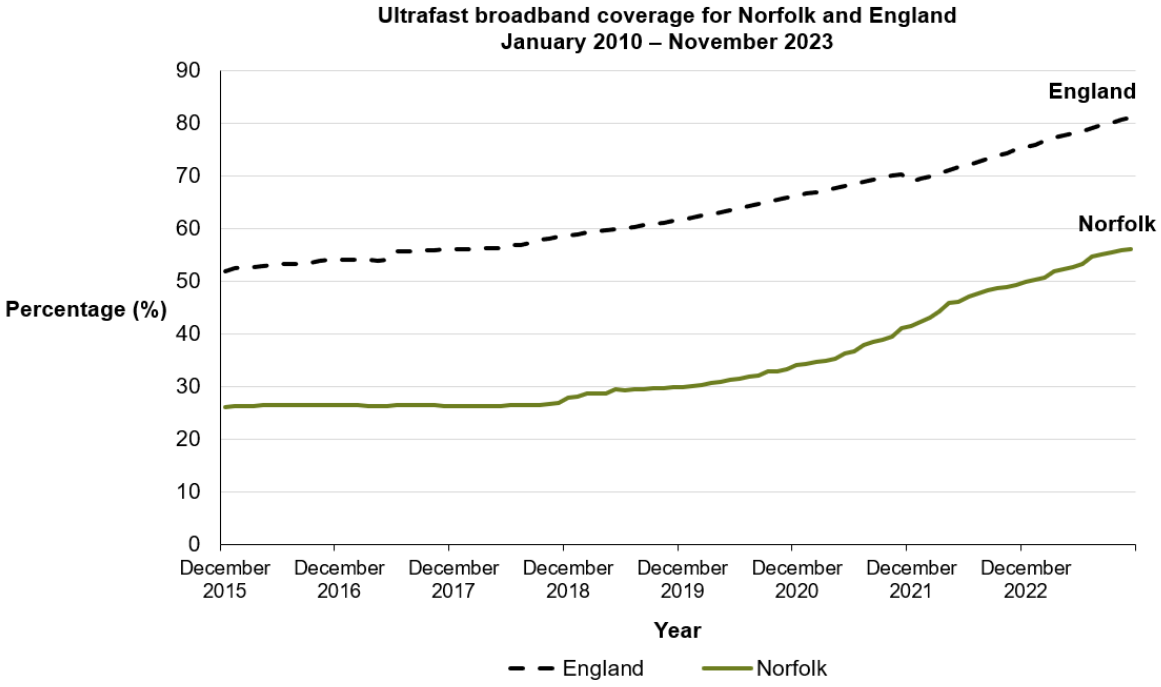
Source: Broadband Coverage and Speed Test Statistics for Norfolk

Ultrafast Broadband Coverage

In November 2023, Norfolk had 56.1% of premises with ultrafast broadband, compared to England's coverage of 81.1%.

The gap between Norfolk and England remained between 24% and 26% between December 2022 and November 2023.

Figure 72: Ultrafast broadband coverage for Norfolk and England (Jan 2010-Nov 2023)



Source: Broadband Coverage and Speed Test Statistics for Norfolk

Table 37: Percentage of premises with ultrafast broadband by month and region in Norfolk and England

Percentage of premises with ultrafast broadband by month and region	Norfolk	England
December 2022	50.0%	75.5%
January 2023	50.3%	76.1%
February 2023	50.9%	76.8%
March 2023	51.9%	77.4%
April 2023	52.4%	77.8%
May 2023	52.8%	78.2%
June 2023	53.3%	78.6%
July 2023	54.8%	79.1%
August 2023	55.2%	79.8%
September 2023	55.6%	80.3%
October 2023	55.9%	80.8%
November 2023	56.1%	81.1%

Source: Broadband Coverage and Speed Test Statistics for Norfolk

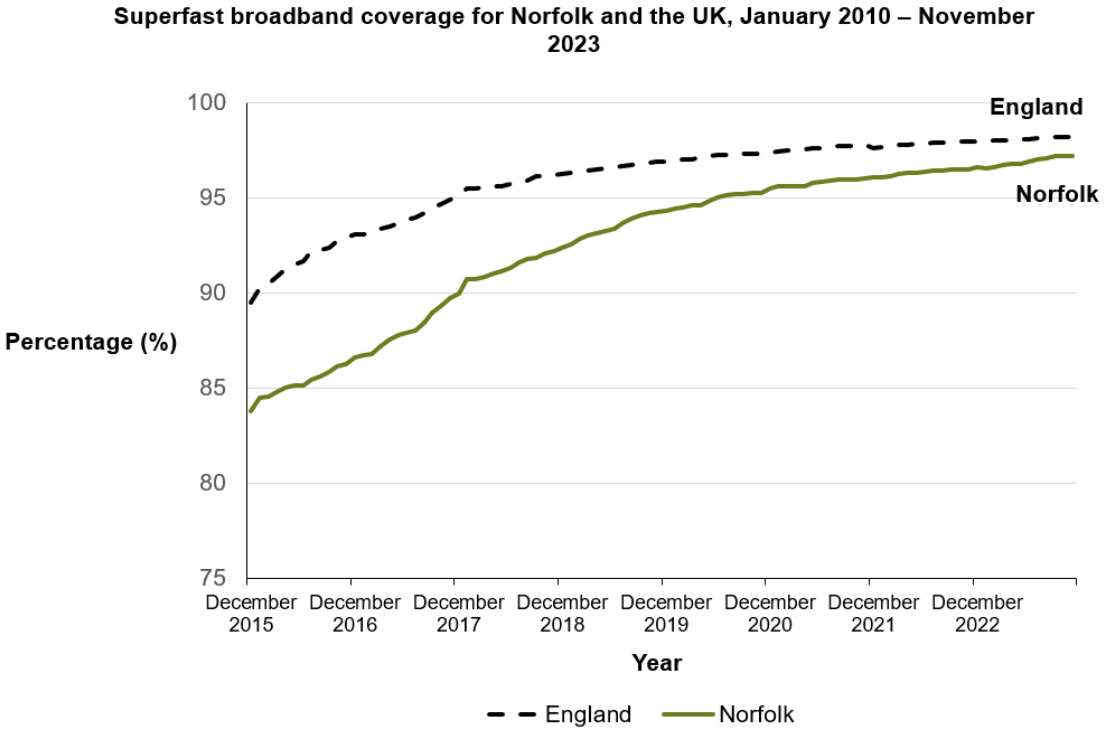
Superfast Broadband Coverage

In November 2023, Norfolk had 97.2% of premises with superfast broadband, compared to England's coverage of 98.2%.

The gap between Norfolk and England remained small between December 2022 and November 2023, with only minimal change to the England percentage.

Please note for Figure 73, the chart scale ranges from 75% to 100% and not 0% to 100%.

Figure 73: Superfast broadband coverage for Norfolk and England (Jan 2010-Nov 2023)



Source: Broadband Coverage and Speed Test Statistics for Norfolk

Table 38: Percentage of premises with superfast broadband by month and region in Norfolk and England

Percentage of premises with superfast broadband by month and region	Norfolk	England
December 2022	96.6%	98.0%
January 2023	96.6%	98.0%
February 2023	96.7%	98.0%
March 2023	96.8%	98.1%
April 2023	96.8%	98.1%
May 2023	96.8%	98.1%
June 2023	96.9%	98.1%
July 2023	97.1%	98.2%
August 2023	97.1%	98.2%
September 2023	97.2%	98.2%

Percentage of premises with superfast broadband by month and region	Norfolk	England
October 2023	97.2%	98.2%
November 2023	97.2%	98.2%

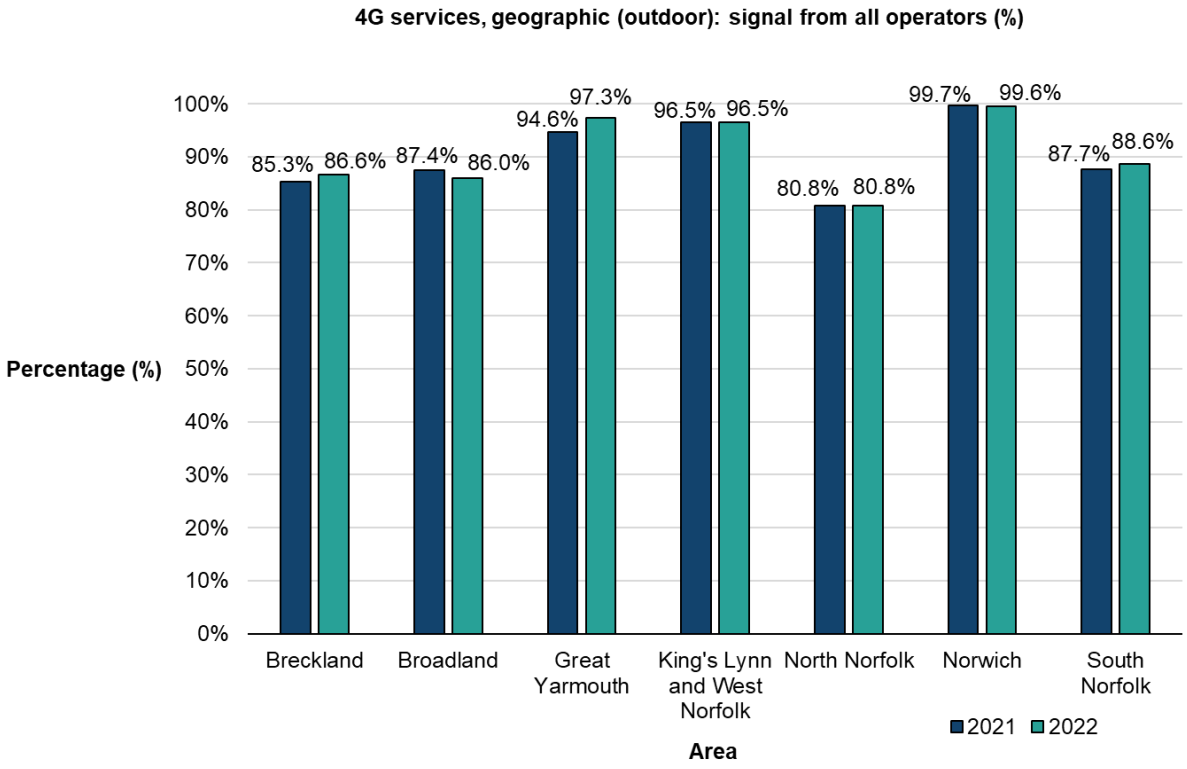
Source: Broadband Coverage and Speed Test Statistics for Norfolk

4G Coverage

In 2022 Norwich had almost 100% 4G signal from all operators, whereas North Norfolk was behind at 80.8%.

The average of the 2022 figures is 90.8%, so we could infer that Norfolk as a whole has 90.8% 4G coverage from all operators. This is up slightly from an average of 90.3% in 2021.

Figure 74: Percentage of 4G services, geographic (outdoor): signal from all operators in Norfolk districts

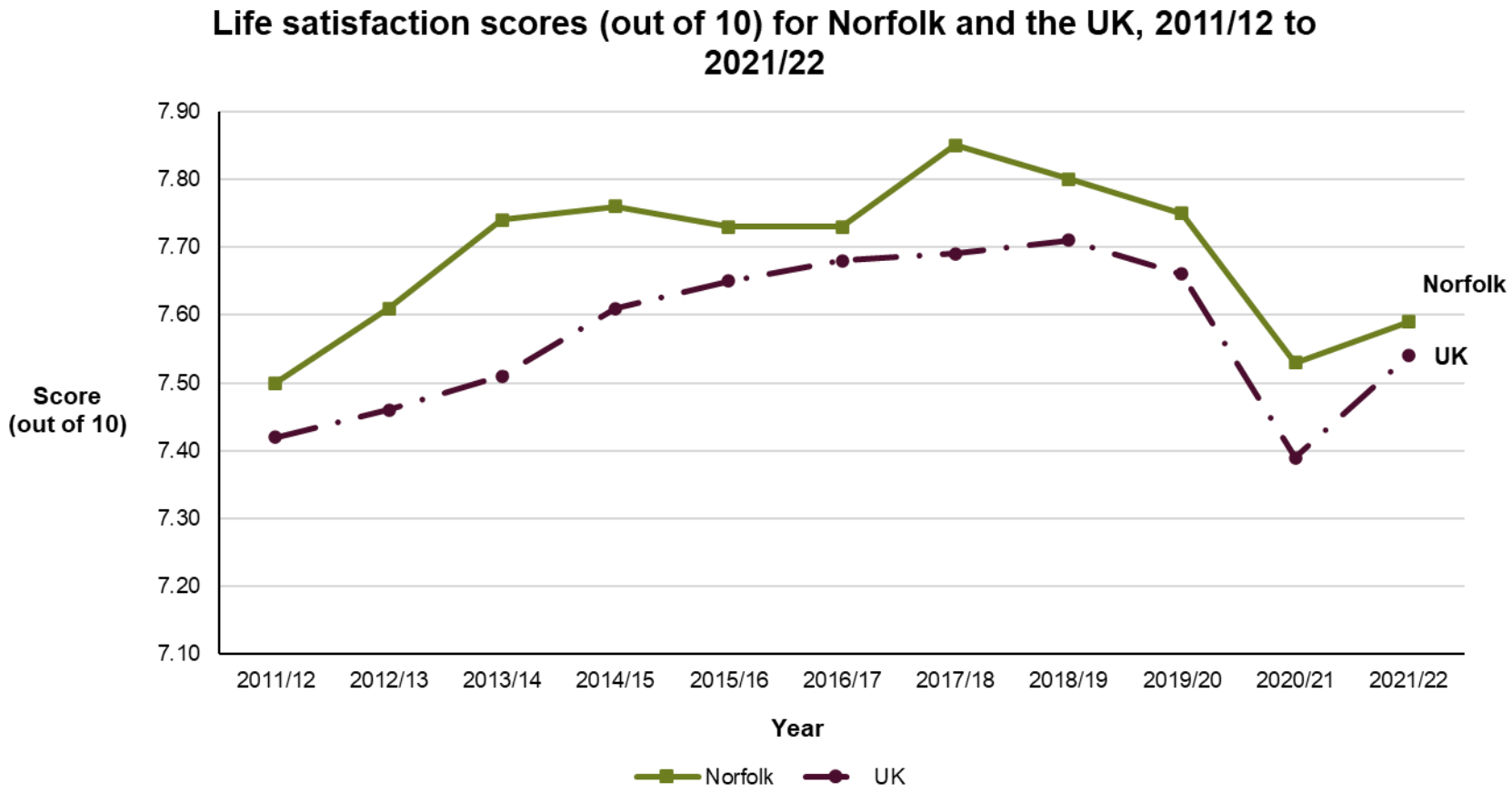


Source: Connected Nations 2022: data downloads - Ofcom

Wellbeing – Life Satisfaction

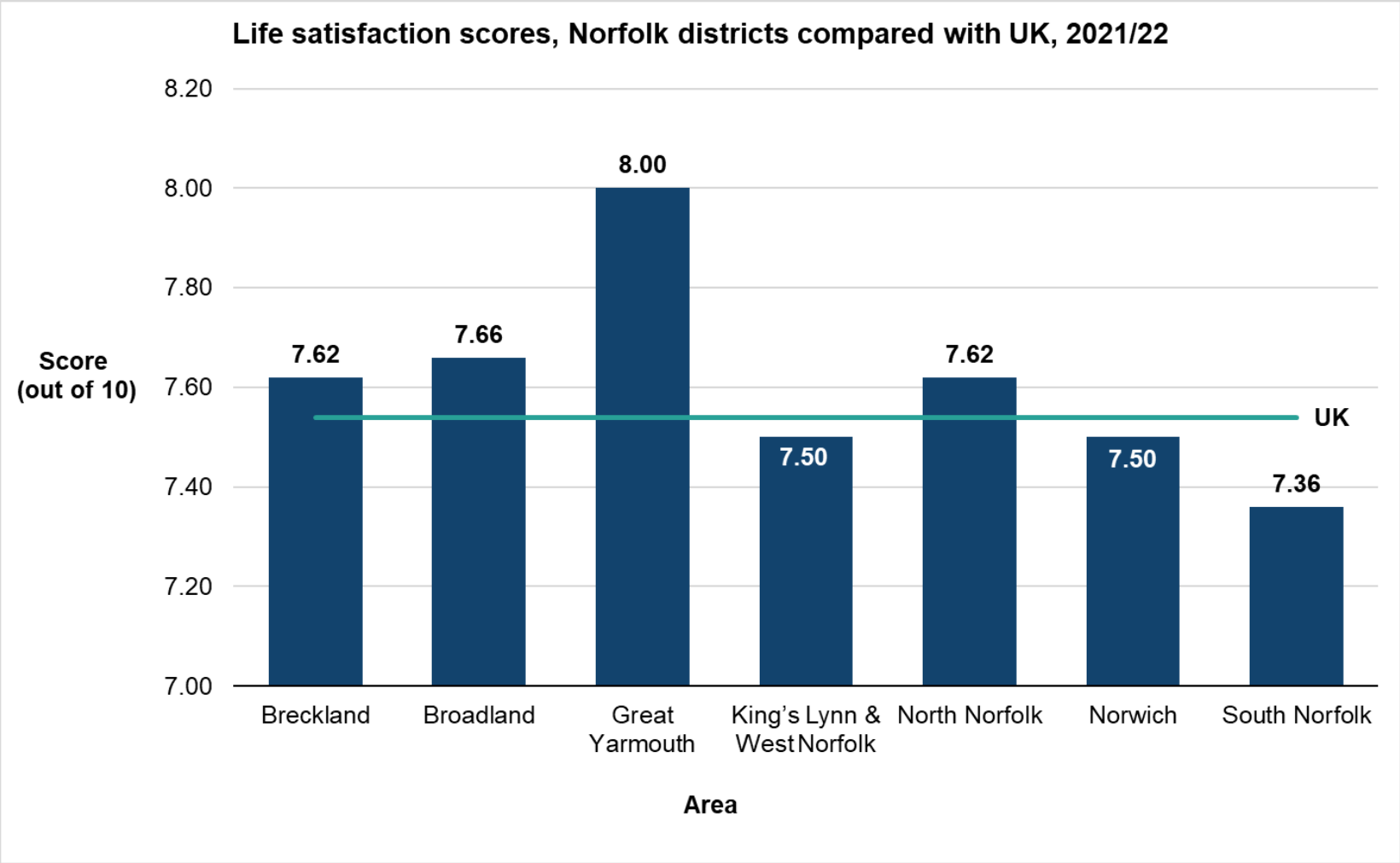
Life satisfaction scores in Norfolk have consistently remained above UK scores for the last 10 years. Four of the seven Norfolk districts had life satisfaction scores above that of the UK overall in 2021/22.

Figure 75: Life satisfaction scores (out of 10) for Norfolk and the UK (2011/12 to 2021/22)



Source: Annual Population Survey – Personal well-being estimates, Local authority edition of the dataset. Question: Overall, how satisfied are you with your life nowadays? Where 0 is 'not at all satisfied' and 10 is 'completely satisfied'.

Figure 76: Life Satisfaction Scores, Norfolk districts compared with UK (2021/22)



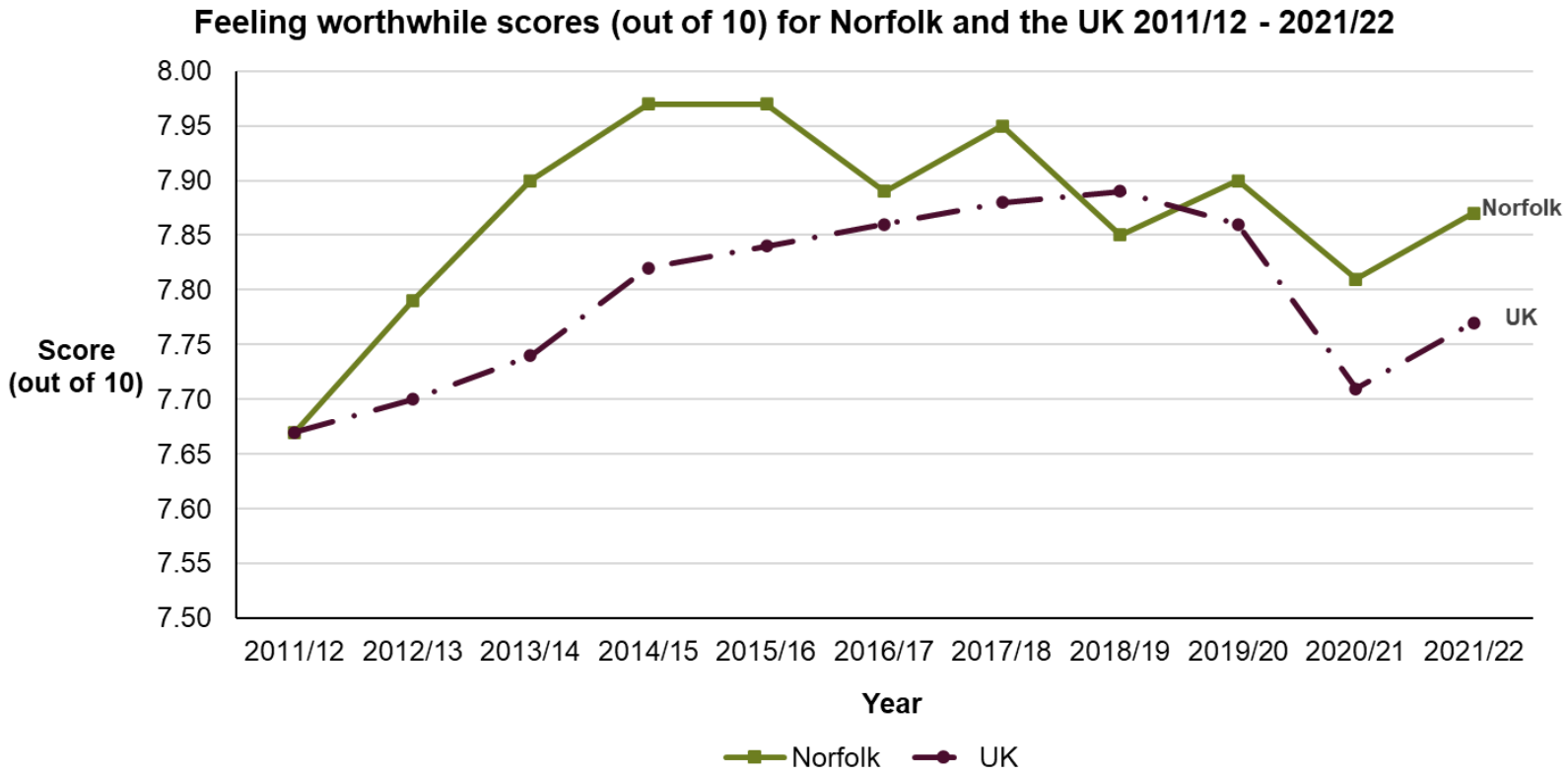
Source: Annual Population Survey – Personal well-being estimates, Local authority edition of the dataset. Question: Overall, how satisfied are you with your life nowadays? Where 0 is 'not at all satisfied' and 10 is 'completely satisfied'.

Wellbeing – A Worthwhile Life

Data for 2021/22 shows that Norfolk scores higher than the UK overall for feeling the ‘things’ people ‘do’ in life are ‘worthwhile’.

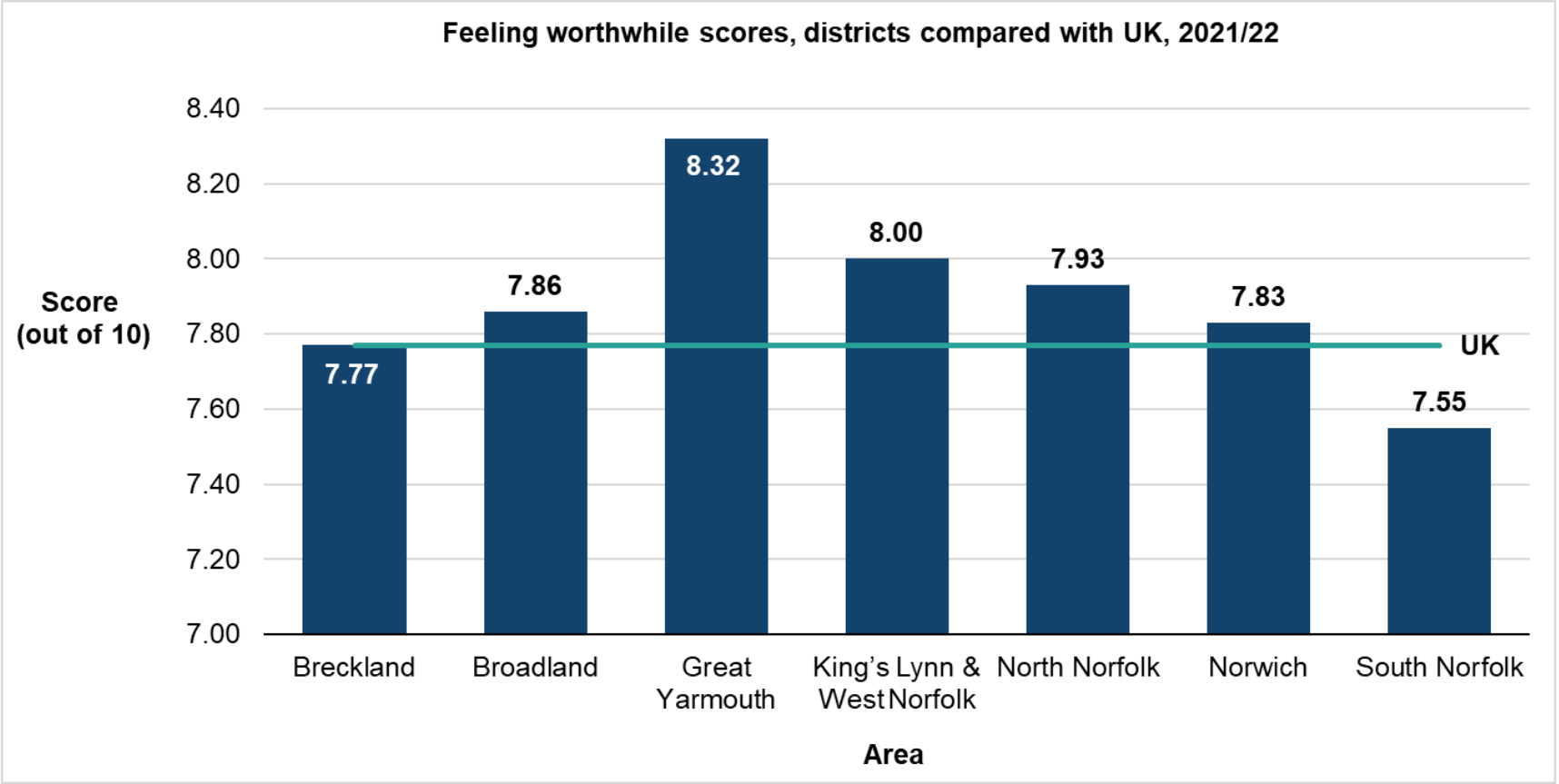
Six of the seven Norfolk districts have ‘feeling worthwhile’ scores equal to, or above the UK overall.

Figure 77: Feeling worthwhile scores (out of 10) for Norfolk and the UK (2011/12-2021/22)



Source: Annual Population Survey – Personal well-being estimates, Local authority edition of the dataset. Question: Overall, to what extent do you feel the things you do in your life are worthwhile? Where 0 is 'not at all worthwhile' and 10 is 'completely worthwhile'.

Figure 78: Feeling worthwhile scores, Norfolk districts compared with the UK (2021/22)



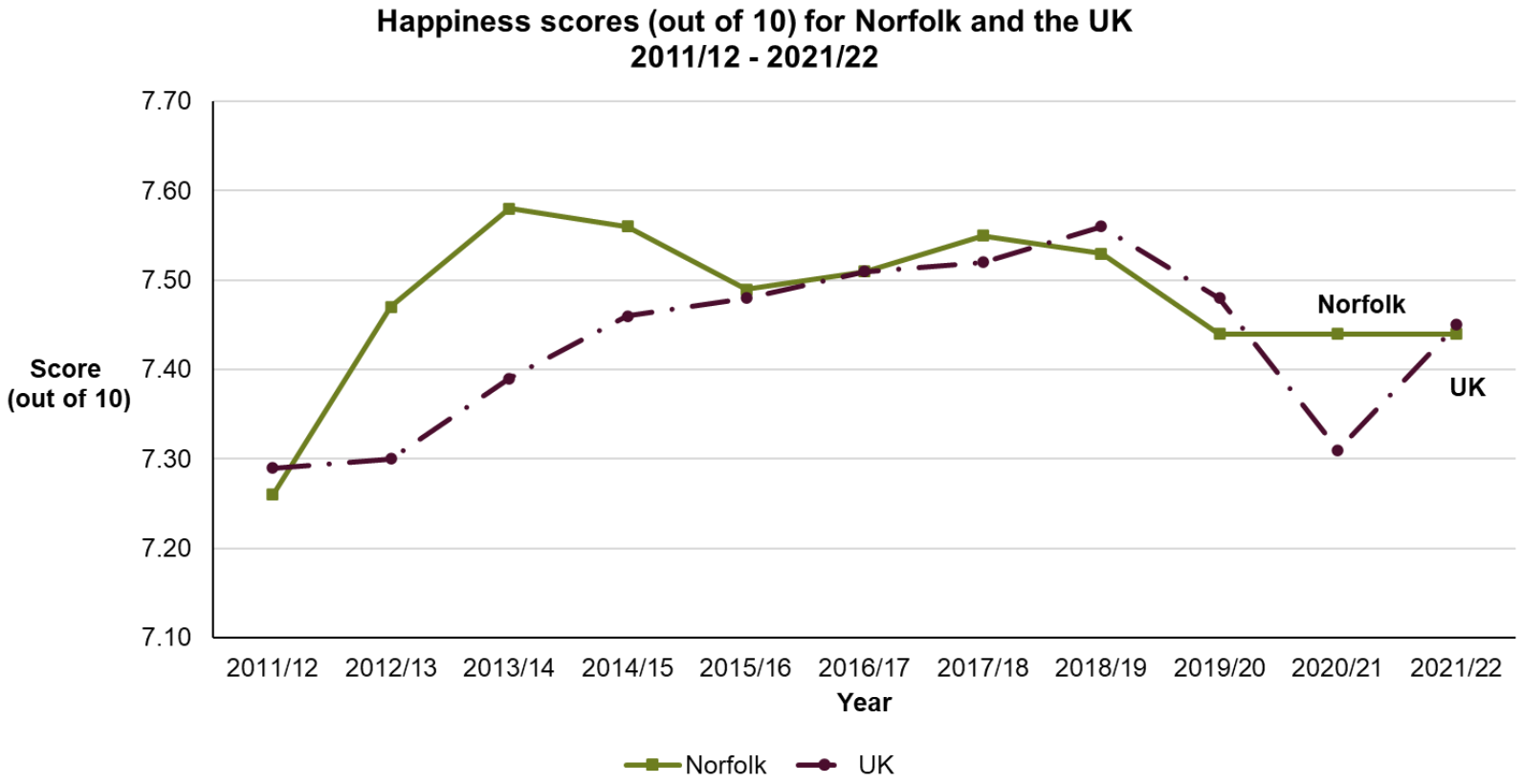
Source: Annual Population Survey – Personal well-being estimates, Local authority edition of the dataset. Question: Overall, to what extent do you feel the things you do in your life are worthwhile? Where 0 is 'not at all worthwhile' and 10 is 'completely worthwhile'.

Wellbeing – Happiness

Happiness scores for Norfolk have remained in-line with the UK overall.

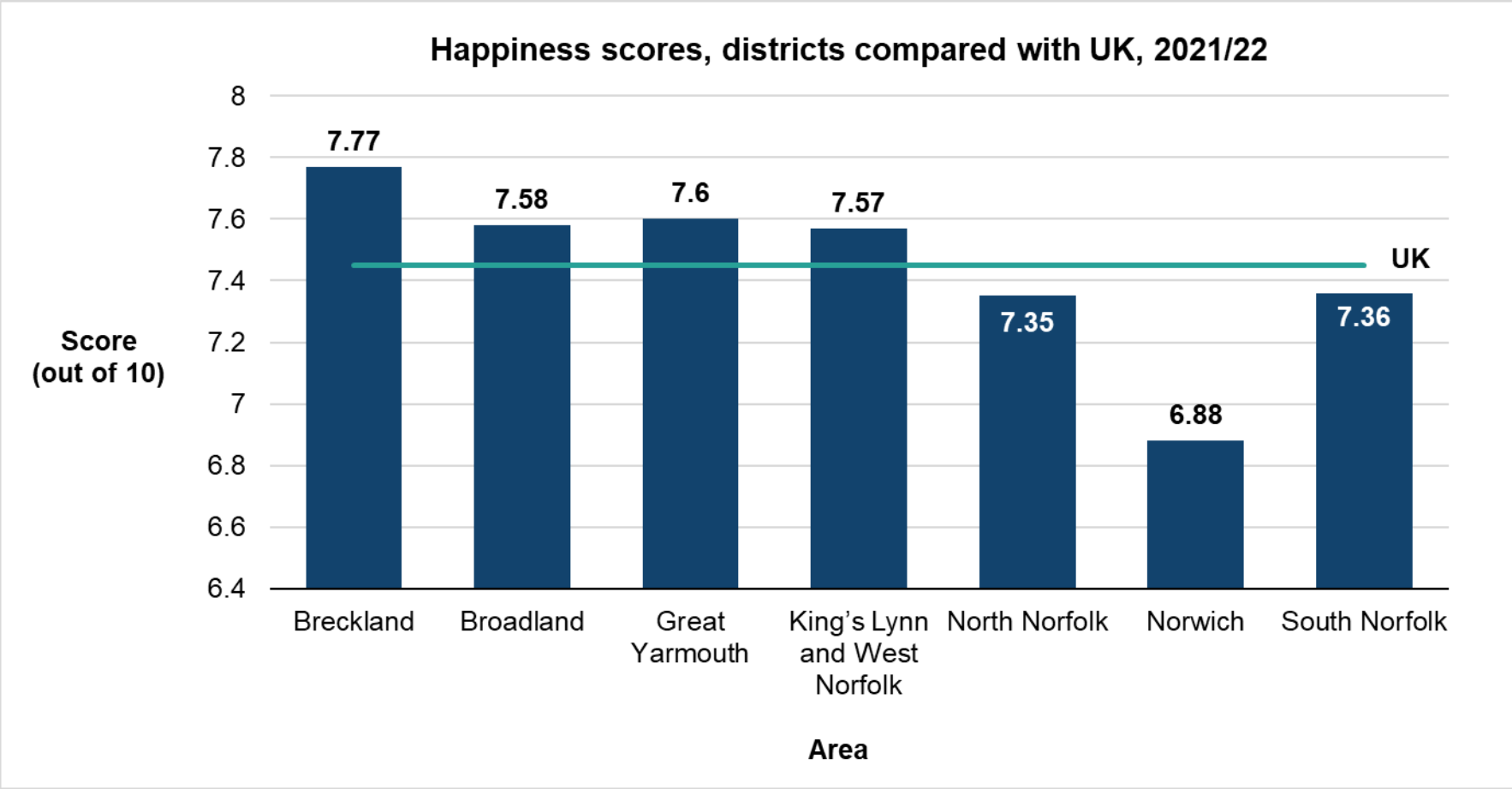
Data for 2021/22, shows that four of the seven Norfolk districts have higher happiness scores than the UK overall.

Figure 79: Happiness scores (out of 10) for Norfolk and the UK (2011/12-2021/22)



Source: Annual Population Survey – Personal well-being estimates, Local authority edition of the dataset. Question: Overall, how happy did you feel yesterday? Where 0 is 'not at all happy' and 10 is 'completely happy'.

Figure 80: Happiness scores, Norfolk districts compared with the UK (2021/22)



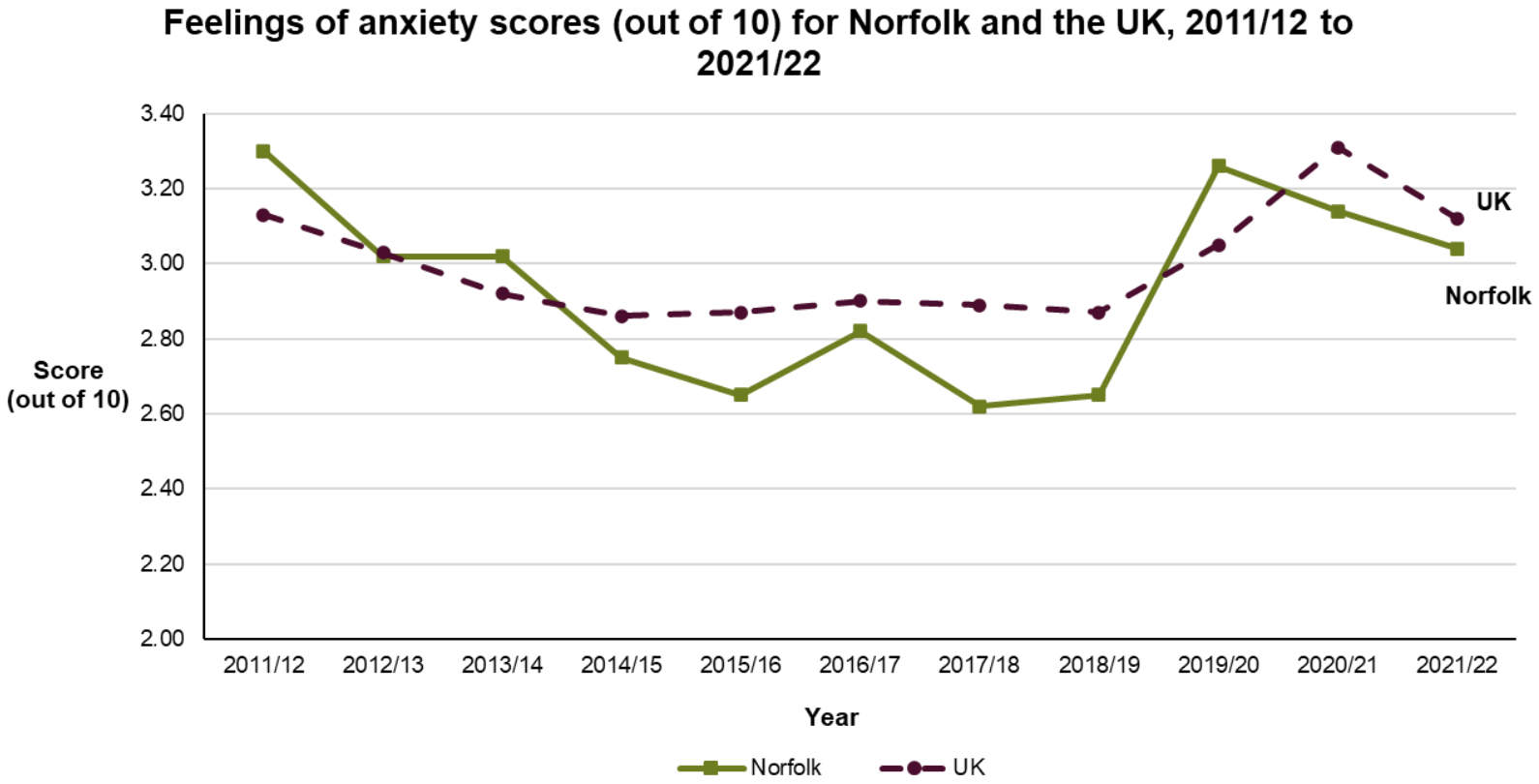
Source: Annual Population Survey – Personal well-being estimates, Local authority edition of the dataset. Question: Overall, how happy did you feel yesterday? Where 0 is 'not at all happy' and 10 is 'completely happy'.

Wellbeing – Anxiety

Feelings of anxiety for Norfolk residents have been in-line with the UK overall.

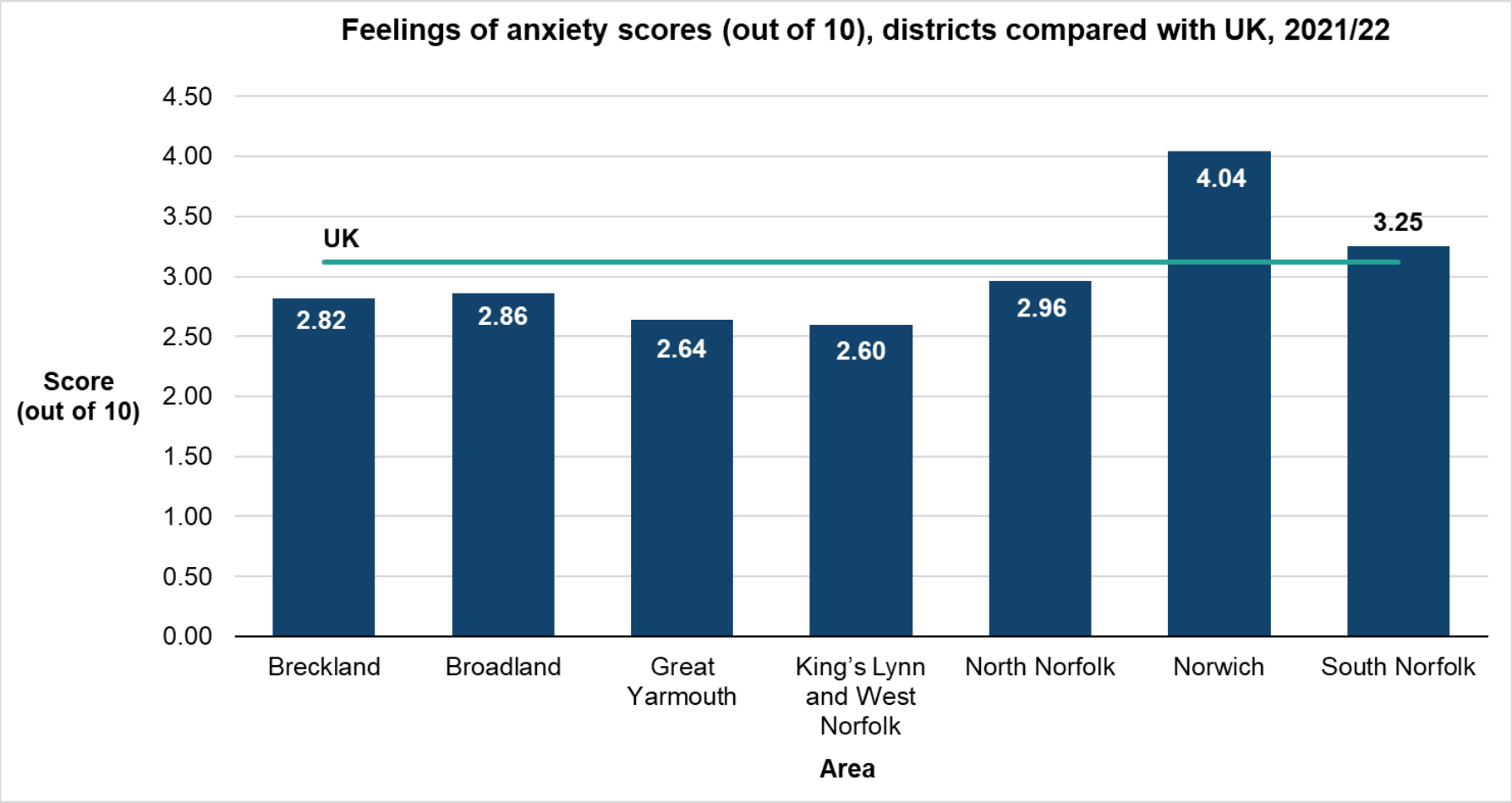
Most (five of the seven) Norfolk districts have lower anxiety scores than of the UK overall.

Figure 81: Feelings of anxiety scores (out of 10) for Norfolk and the UK (2011/12 to 2021/22)



Source: Annual Population Survey – Personal well-being estimates, Local authority edition of the dataset. Question: Overall, how anxious did you feel yesterday? Where 0 is 'not at all anxious' and 10 is 'completely anxious'.

Figure 82: Feelings of anxiety scores (out of 10), Norfolk districts compared with the UK (2021/22)

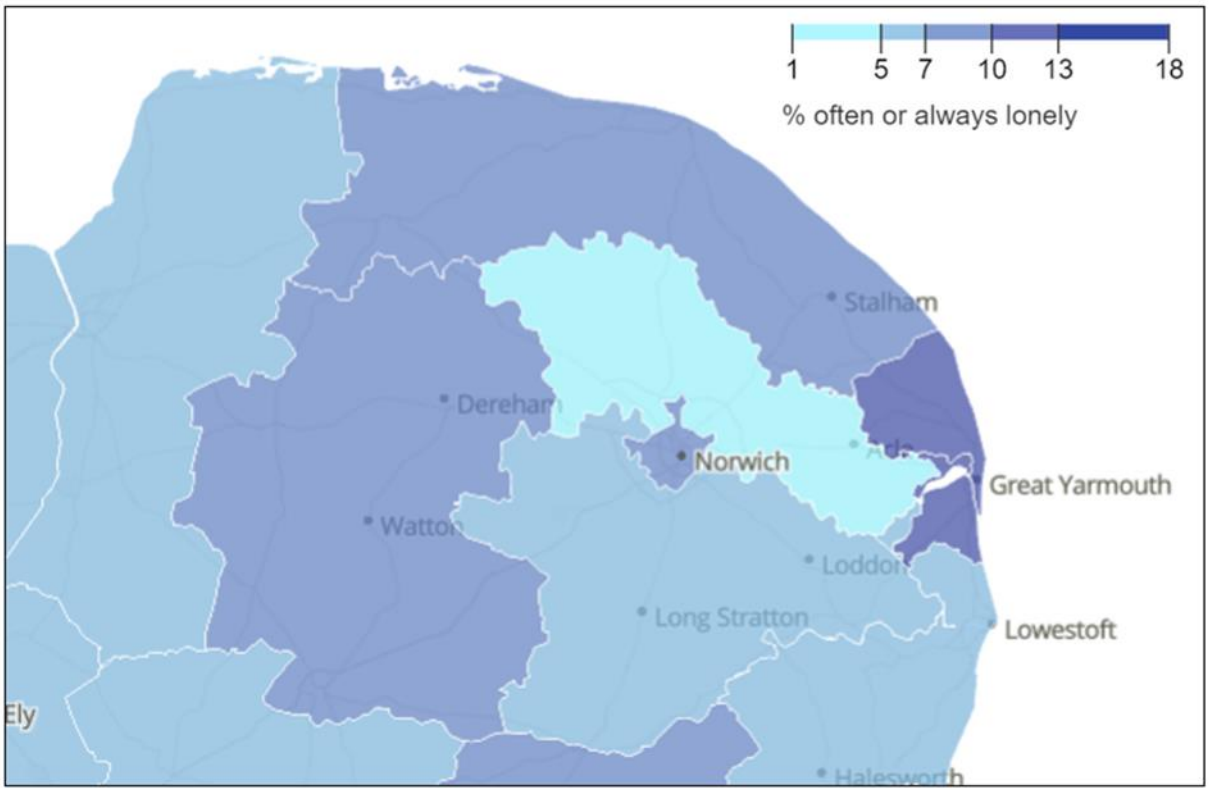


Source: Annual Population Survey – Personal well-being estimates, Local authority edition of the dataset. Question: Overall, how satisfied are you with your life nowadays? Where 0 is 'not at all satisfied' and 10 is 'completely satisfied'.

Loneliness

The map below (Figure 83) shows a measure of loneliness – the percentage of adults aged 16 and over reporting “often or always” feeling lonely, from October 2020 to February 2021. Table 39 shows the percentage of loneliness in each Norfolk district, and in Great Britain. Please note this data was gathered during the Covid-19 pandemic national lockdowns.

Figure 83: Percentage of Norfolk residents who report feeling often or always lonely by district



Source: Mapping loneliness during the coronavirus pandemic - Office for National Statistics

Table 39: Percentage of residents who report feeling often or always lonely in Norfolk districts and Great Britain

Location	Percentage
Breckland	7.7%
Broadland	4.5%
Great Yarmouth	10.7%
King’s Lynn and West Norfolk	6.3%
North Norfolk	8.5%
Norwich	8.4%
South Norfolk	6.8%
Great Britain	7.2%

Source: Mapping loneliness during the coronavirus pandemic - Office for National Statistics

Further context and links to other data sets have been provided by the ONS in the source link for Figure 85.

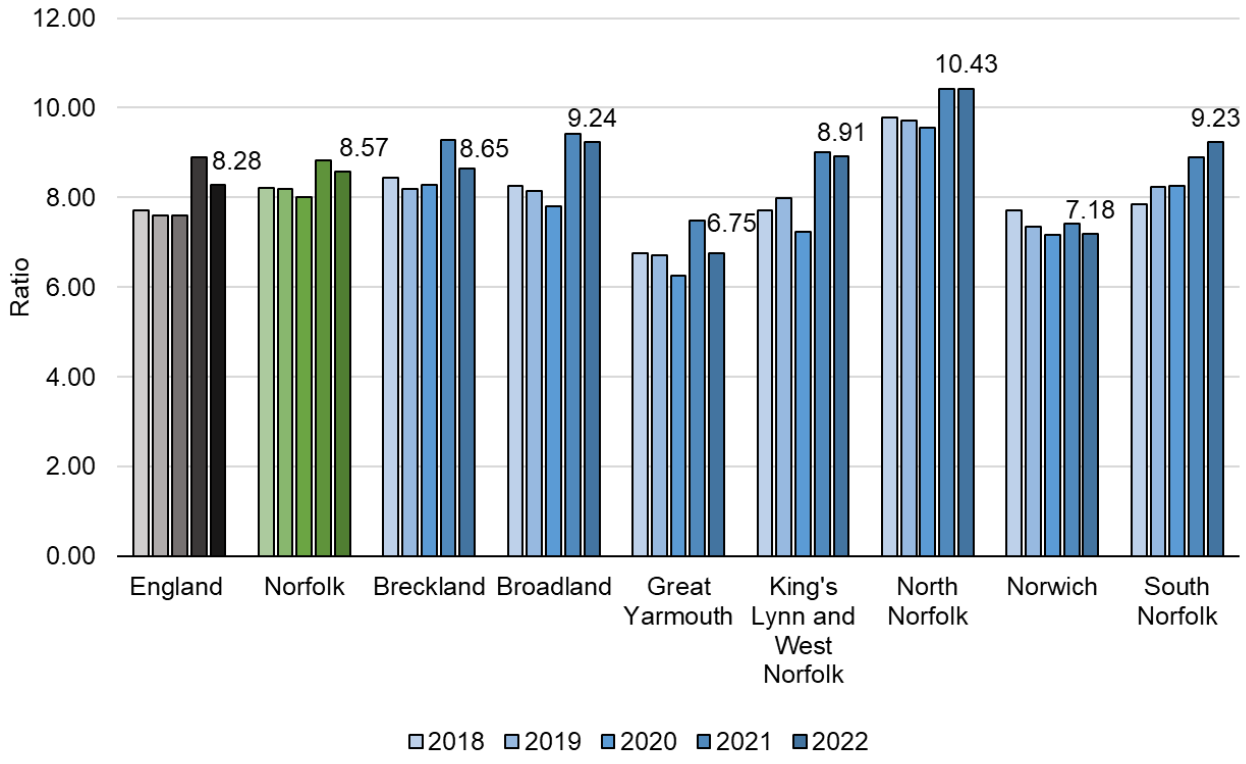
Housing Affordability

Figure 84 shows the ratio of housing affordability for Norfolk districts, Norfolk, and England. For this measure, a lower ratio is a positive. Therefore, Norfolk's affordability of housing (in comparison to earnings) of 8.57 (for 2022) is less affordable than England (8.28).

Great Yarmouth (6.75) and Norwich (7.18) have the lowest ratios, indicating that they are relatively more affordable for those who live there to buy a house, compared to other Norfolk districts.

North Norfolk (10.43), Broadland (9.24) and South Norfolk (9.23) have the highest ratios indicating that they are relatively less affordable for those who live there to buy a house, compared to other Norfolk districts.

Figure 84: Housing affordability for England, Norfolk, and Norfolk districts (2018 to 2022)



Source: House price (existing dwellings) to residence-based earnings ratio - Office for National Statistics

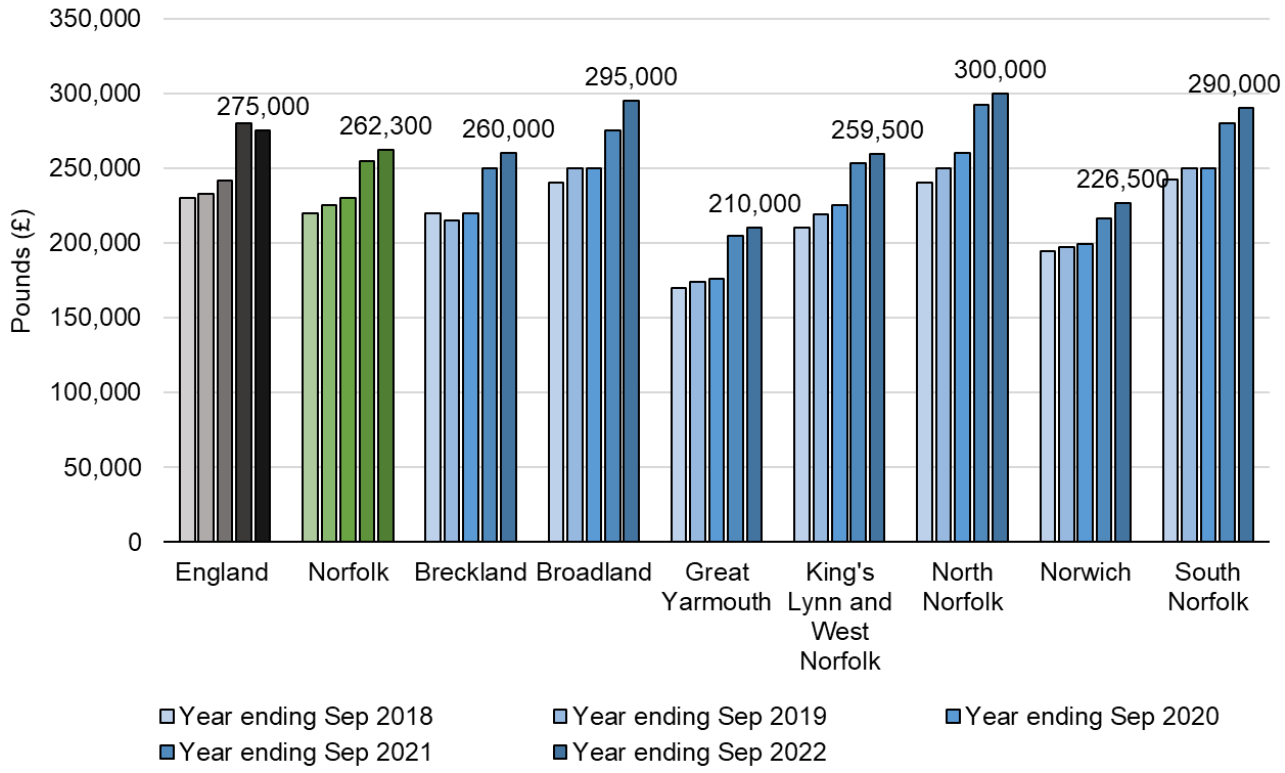
House Prices

The average median price paid for a house in Norfolk for the year ending September 2022 was £262,300, compared to £275,000 for England. Of the districts, North Norfolk has the highest average median house price at £300,000, with Great Yarmouth having the lowest at £210,000.

The median price paid for a house in Norfolk increased by £42,300 between the year ending September 2018 and the year ending September 2022. This is slightly below England's median price (£45,000).

North Norfolk saw the largest increase in this period (£60,000) while Norwich saw the least (£31,750).

Figure 85: Median house price (existing dwellings) for England, Norfolk and Norfolk districts, year ending September 2018 to year ending September 2022 (£)



Source: House price (existing dwellings) to residence-based earnings ratio - Office for National Statistics

Planned Housing

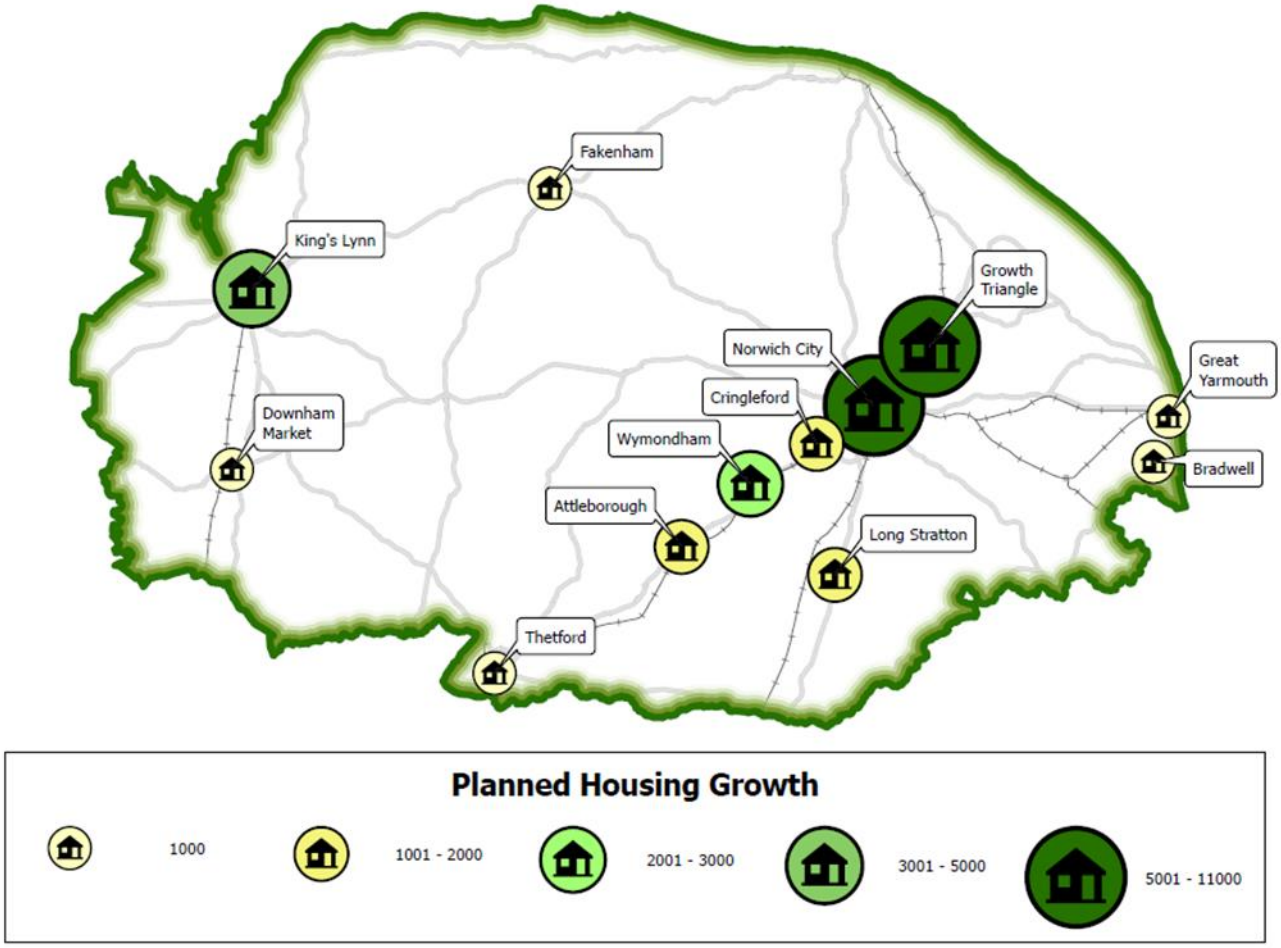
The map below (Figure 86) shows the planned housing in Norfolk– taken from several local plans. It shows housing growth along the 'Cambridge Norwich Tech Corridor'.

It identifies the key strategic housing sites from the following local plans:

- Breckland: 2011 – 2036
- Great Yarmouth: 2013 – 2030
- Kings Lynn & West Norfolk: 2001 – 2026
- North Norfolk 2001 – 2025
- Greater Norwich: 2018 – 2036

The map doesn't include all housing but shows the major sites. It should also be noted that it doesn't account for what has been built since the start of the local plan period(s).

Figure 86: Planned housing in Norfolk from District Local Plans



Source: Draft Norfolk Strategic Infrastructure Delivery Plan 2023 (due to be available online September 2024 on the Norfolk County Council website on the Strategic Infrastructure Delivery Plan page.

Table 40: Number of houses planned in the Local Plan period and number of houses built since the Local Plans adopted for Norfolk districts

Norfolk District	Local Plan period	Number of houses planned in the Local Plan period	Completions since start of Local Plan Period Total (Annual Average)
Breckland	2011-2036	15,298	7,029
Great Yarmouth	2013-2030	5,303	2,829
King's Lynn & West Norfolk	2001-2026	16,500	11,471
North Norfolk	2001-2025	8,025	8,661
Greater Norwich Local Plan (Broadland, Norwich and South Norfolk)	2018-2036	45,041	9,426
Norfolk Total	**Not applicable**	**90,167**	**39,416**

Source: Draft Norfolk Strategic Infrastructure Delivery Plan 2023 (due to be available online September 2024 on the Norfolk County Council website, on this page: Strategic Infrastructure Delivery Plan)

Gross Disposable Household Income (GDHI) per head

Gross disposable household income (GDHI) is the amount of money that all the individuals in the household sector have available for spending or saving after they have paid direct and indirect taxes and received any direct benefits. GDHI is a concept that is seen to reflect the 'material welfare' of the household sector. The household sector includes residents of traditional households, as well as those living in communal establishments. GDHI also includes the business income of self-employed people.

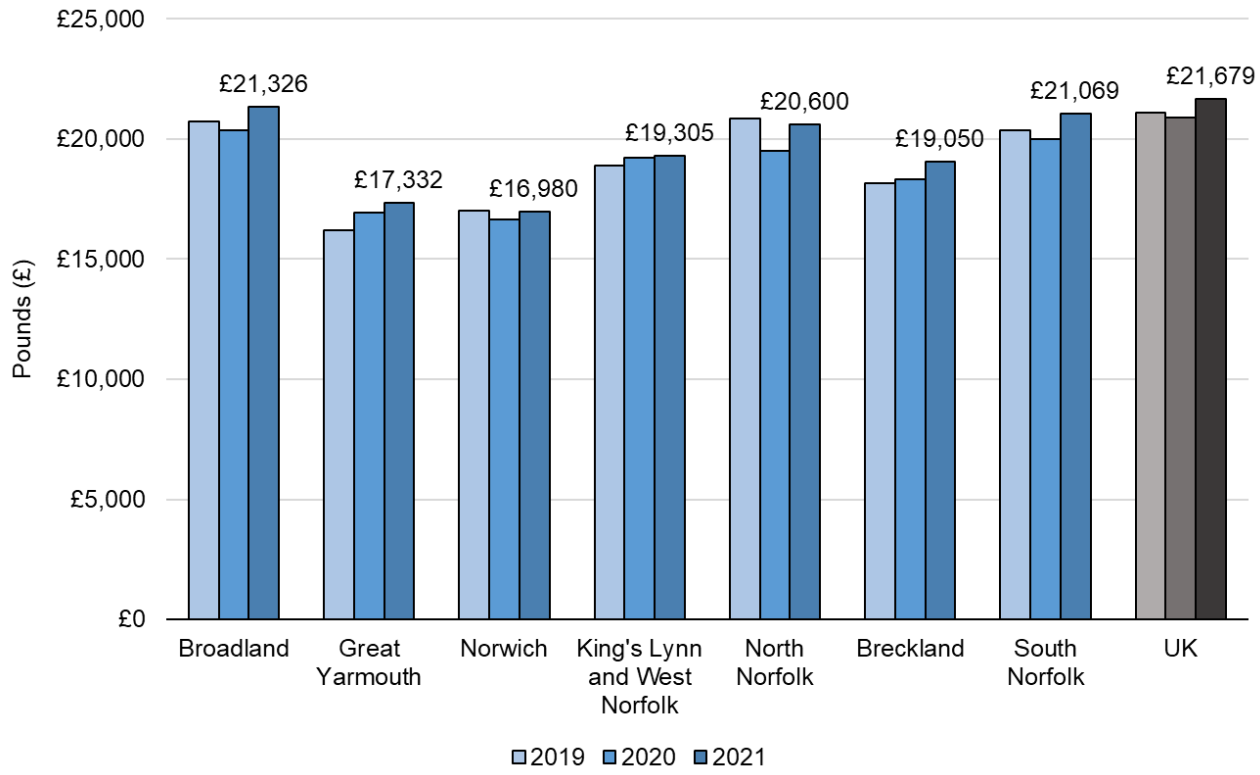
In 2021, GDHI was highest in Broadland (£21,326) and South Norfolk (£21,069), but all of Norfolk's districts are below the UK overall. When looking at the 5-year change between 2017 and 2021, four of the seven districts had a bigger percentage change than the UK (see table 41).

Table 41: GDHI Percentage change for Norfolk districts and the UK, 2017 -2021

Location	GDHI Percentage change (2017 – 2021)
Breckland	+12.6%
Broadland	+7.2%
Great Yarmouth	+16.0%
King's Lynn and West Norfolk	+11.4%
North Norfolk	+9.4%
Norwich	+10.2%
South Norfolk	+9.6%
UK	+10.0%

Source: Regional gross disposable household income, UK - Office for National Statistics

Figure 87: Gross disposable household income, Norfolk districts and the UK (2019-2021)



Source: [Regional gross disposable household income, UK - Office for National Statistics]

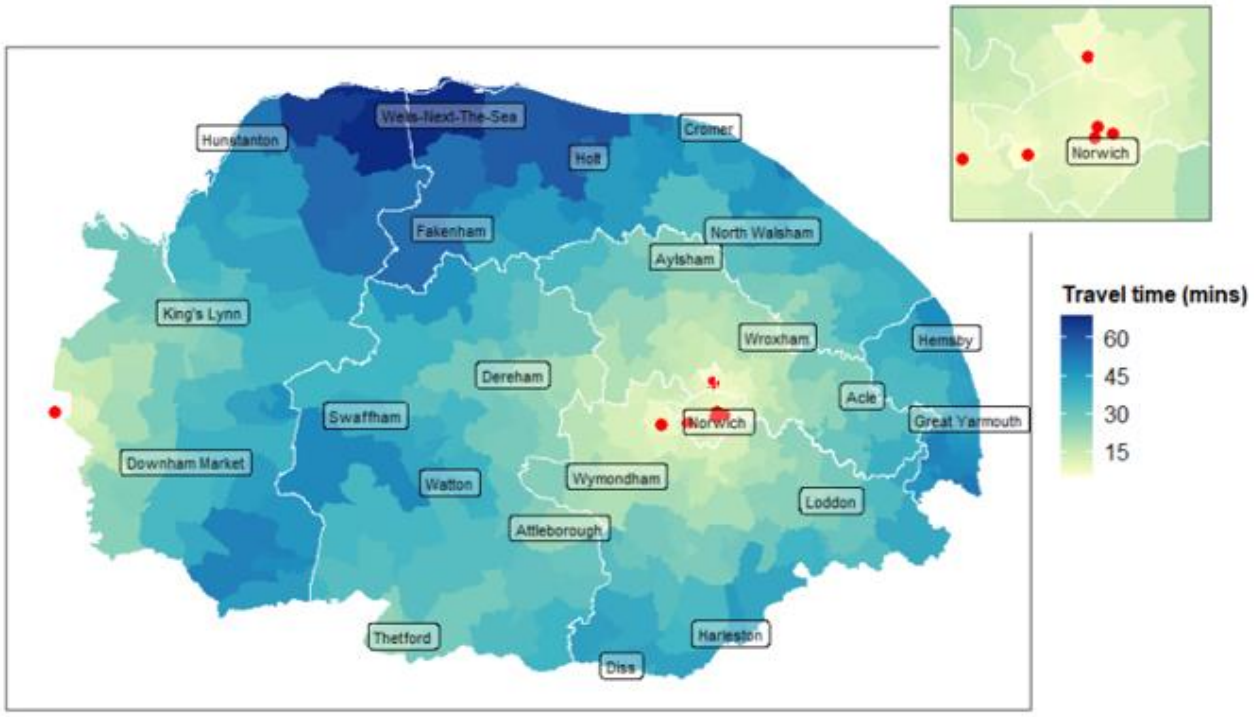
Transport Connectivity

The map below (Figure 88) shows the average travel time to an employment centre of 5,000+ people by car for each LSOA in Norfolk. An employment centre is defined as an LSOA where there are 5,000 or more jobs. These are marked on the map with red dots. However, as this is a screen shot, not all employment centres are shown, Norfolk has seven LSOAs that meet the criteria; five in Norwich, one in Broadland and one in South Norfolk.

Norwich and surrounding areas are fairly well connected, but we can see that some areas of North Norfolk are over an hour, on average, by car from the nearest employment centre of 5,000+.

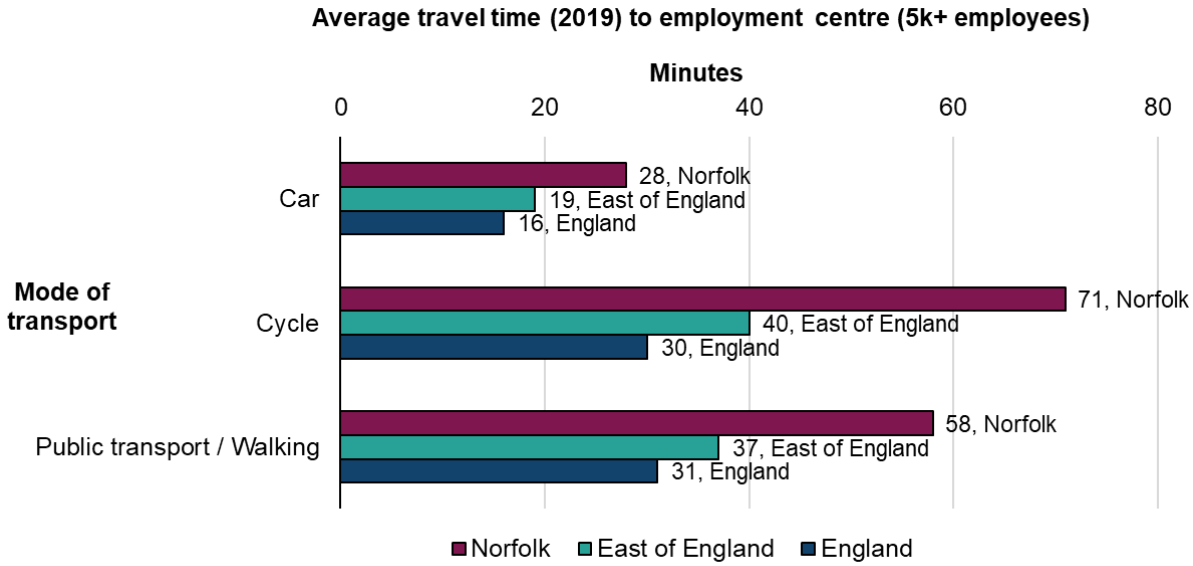
Figure 89 shows that Norfolk has higher average travel times by all methods of transport to employment centres of 5000+ employees.

Figure 88: Average car travel times by LSOA (2019)



Source: [Table JTS0401 – Journey time statistics: data tables (JTS) - GOV.UK]

Figure 89: Average travel time to employment centre of 5,000+ employees in Norfolk, the East of England, and England in 2019



Source: [Journey time statistics: data tables (JTS) - GOV.UK]

Journey Times by Public Transport/Walking

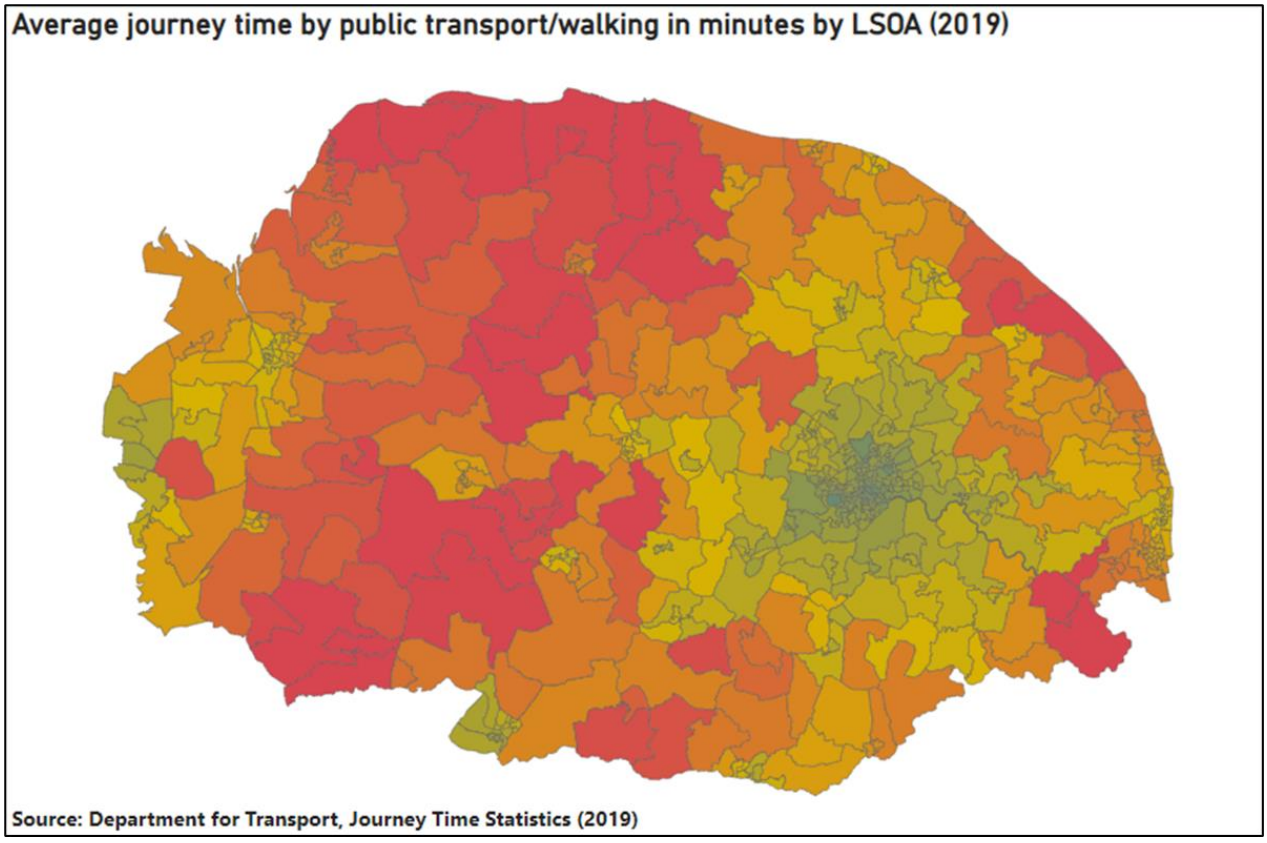
This map illustrates the average travel time in minutes to a large employment centre (5000+ jobs) by public transport/walking by LSOA.

Red areas on the map show a **longer** journey time and **green** areas show a **shorter** journey time on average.

The map highlights the disparity in journey times between urban and rural/coastal areas of the county given the greater proportion of green zones in the Greater Norwich Area and a larger proportion of red areas in the north and the south-west of the county.

It should be noted that individual journeys **in excess of 120 mins are assigned a maximum value of 120** minutes. This means that some individual journeys could take longer but are reported as 120 minutes and could impact the reported average journey time.

Figure 90: Average journey time by public transport/walking in minutes by LSOA (2019)



Source: Department for Transport, Journey Time Statistics (2019)

Bus services

There are currently 220 services, run by 14 operators, in operation in Norfolk. 89% of the network is run commercially while the remaining 11% is covered by tendered services (funded and contracted out by the county council) which are either fixed route or demand responsive services. Frequency of service varies, with the more concentrated frequencies being in and between the urban centres of Norwich, Great Yarmouth and King's Lynn. Areas in which services are less frequent (in the north, west and south of the county) tend to have one bus per hour or less.

Bus Service Coverage: The below map (Figure 91) shows the current coverage of routes across Norfolk. Also shown are the current and proposed 'gold stops' and travel hubs.

Figure 91: Current bus service routes in Norfolk and proposed 'gold stops' and travel hubs

Source: [National bus strategy - Norfolk County Council]

Bus Service Frequency: The map below (Figure 92) shows the bus routes (not including those within urban centres) that have services with a frequency of every 30 minutes or better.

Figure 92: Bus routes that have services with a frequency of every 30 minutes or better

Source: National bus strategy - Norfolk County Council

Access to Services

Table 42 shows the average of minimum journey times to key services (medium sized centres of employment (500-4999 jobs), primary schools, secondary schools, further education, GPs, hospitals, food stores, and town centres) by mode of travel for Norfolk, Norfolk districts, the East of England, and England in 2019.

Norfolk, and most district areas, both have higher average travel times to key services than the East of England and England.

However, the exception is that Norwich has lower average minimum travel times than both the East of England and England across all methods of transport.

Great Yarmouth is also lower than the East of England for all four methods, and below England for one of the four.

North Norfolk, as we might expect with its rurality has the higher average travel times of all the districts across all methods.

Table 42: Average minimum travel time (in minutes) to reach the nearest key services by mode of travel for Norfolk, Norfolk districts, the East of England and England (2019)

Area	Average minimum travel time by public transport / walking	Average minimum travel time by cycle	Average minimum travel time by car	Average minimum travel time by walking
Norfolk	25 mins 24 secs	23 mins 48 secs	12 mins 54 secs	43 mins 54 secs
Breckland	30 mins 48 secs	28 mins 6 secs	13 mins 42 secs	48 mins 0 secs
Broadland	27 mins 18 secs	23 mins 54 secs	13 mins 24 secs	49 mins 6 secs
Great Yarmouth	17 mins 42 secs	17 mins 12 secs	10 mins 36 secs	33 mins 30 secs
King's Lynn and West Norfolk	25 mins 48 secs	26 mins 0 secs	13 mins 12 secs	51 mins 6 secs
North Norfolk	34 mins 6 secs	35 mins 18 secs	17 mins 54 secs	57 mins 36 secs
Norwich	15 mins 42 secs	12 mins 54 secs	9 mins 24 secs	22 mins 0 secs
South Norfolk	28 mins 6 secs	25 mins 24 secs	13mins 24 secs	50 mins 6 secs
East of England	20 mins 42 secs	18 mins 36 secs	11 mins 18 secs	34 mins 6 secs
England	17 mins 54 secs	15 mins 36 secs	10 mins 18 secs	28 mins 0 secs

Source: Table JTS0104 – Journey time statistics: data tables (JTS) - GOV.UK

Commuting Patterns

211,276 people commute within Norfolk (i.e. from a Norfolk district to the same/another Norfolk district).19,546 commute from elsewhere into Norfolk, and 29,096 commute out of Norfolk to elsewhere. This results in a net change of -9,550. As such, we have more people commuting out of Norfolk than in.

Due to the Census being taken while national lockdowns and the furlough scheme were in place, the ONS advise caution when looking at travel and working patterns, so these should be seen as estimates only. Please read further information on the dataset here: Travel to work quality information for Census 2021 - Office for National Statistics

Travel to Work Areas (TTWAs)

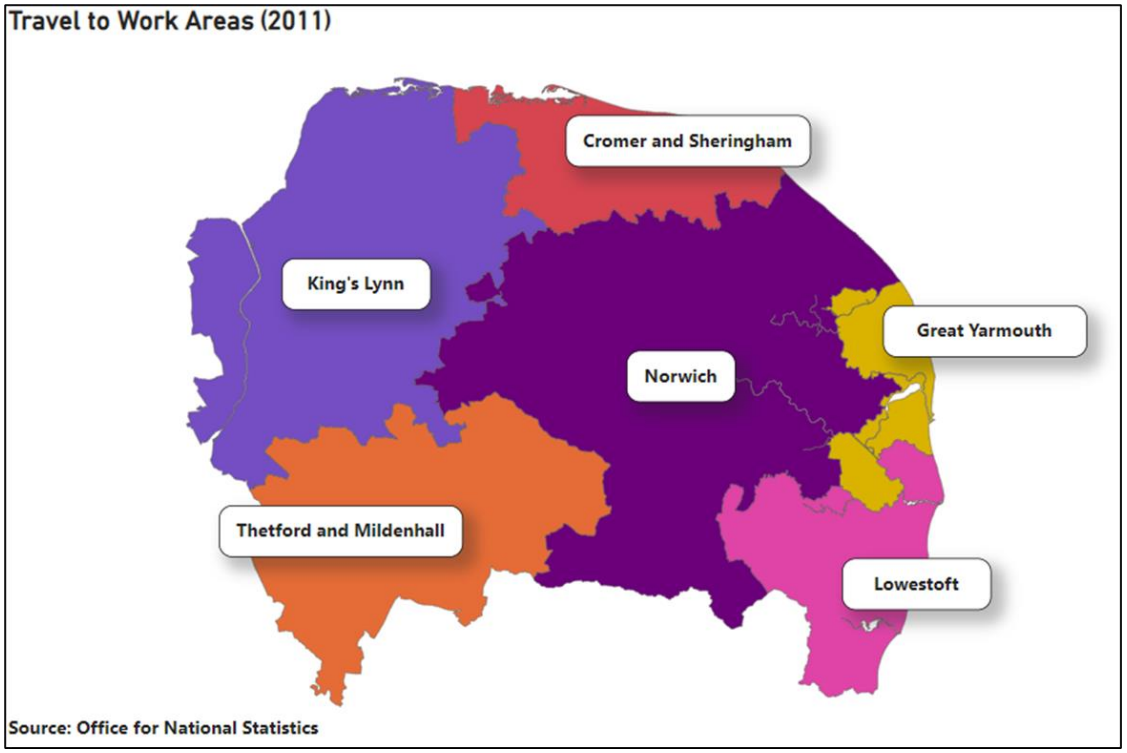
This map illustrates the Travel to Work Areas (TTWAs) which occur in the Norfolk area. TTWAs are a geography created to approximate labour market areas. In other words, they are derived to reflect self-contained areas in which most people both live and work.

The current criteria for defining TTWAs are that at least 75% of the area's resident workforce works in the area and at least 75% of the people who work in the area also live in the area. The area must also have an economically active population of at least 3,500.

The six defined TTW boundaries in the Norfolk area are:

- Cromer and Sheringham
- Great Yarmouth
- King’s Lynn
- Lowestoft
- Norwich
- Thetford and Mildenhall

Figure 93: Travel to Work Areas (2011)



Source: ONS Open Geography Portal

Location of Usual Residence and Place of Work

Table 43 shows the percentage of people who work mainly at or from home in Norfolk, Norfolk districts, the East of England and England. 25.4% of people in Norfolk worked mainly at or from home in 2021, compared to 31.5% of people in England.

South Norfolk had the highest percentage of people who work mainly at or from home (31.5%), followed by Broadland (30.3%). Great Yarmouth had the lowest percentage of people who work mainly at or from home (16.6%).

Table 43: Percentage of people who work mainly at or from home in Norfolk, Norfolk districts, the East of England, and England

Location	Percentage of people who work mainly at or from home
Norfolk	25.4%
Breckland	21.9%
Broadland	30.3%
Great Yarmouth	16.6%
King's Lynn and West Norfolk	20.5%
North Norfolk	24.3%
Norwich	29.6%
South Norfolk	31.5%
East of England	31.9%
England	31.5%

Source: Travel to work, England and Wales - Office for National Statistics and ODWP01EW from Origin-destination data, England and Wales: Census 2021 - Nomis - Official Census and Labour Market Statistics

Figure 94 shows the location of usual residence and place of work for Norfolk districts (taken from the 2021 Census). Table 44 replicates the information provided in Figure 94.

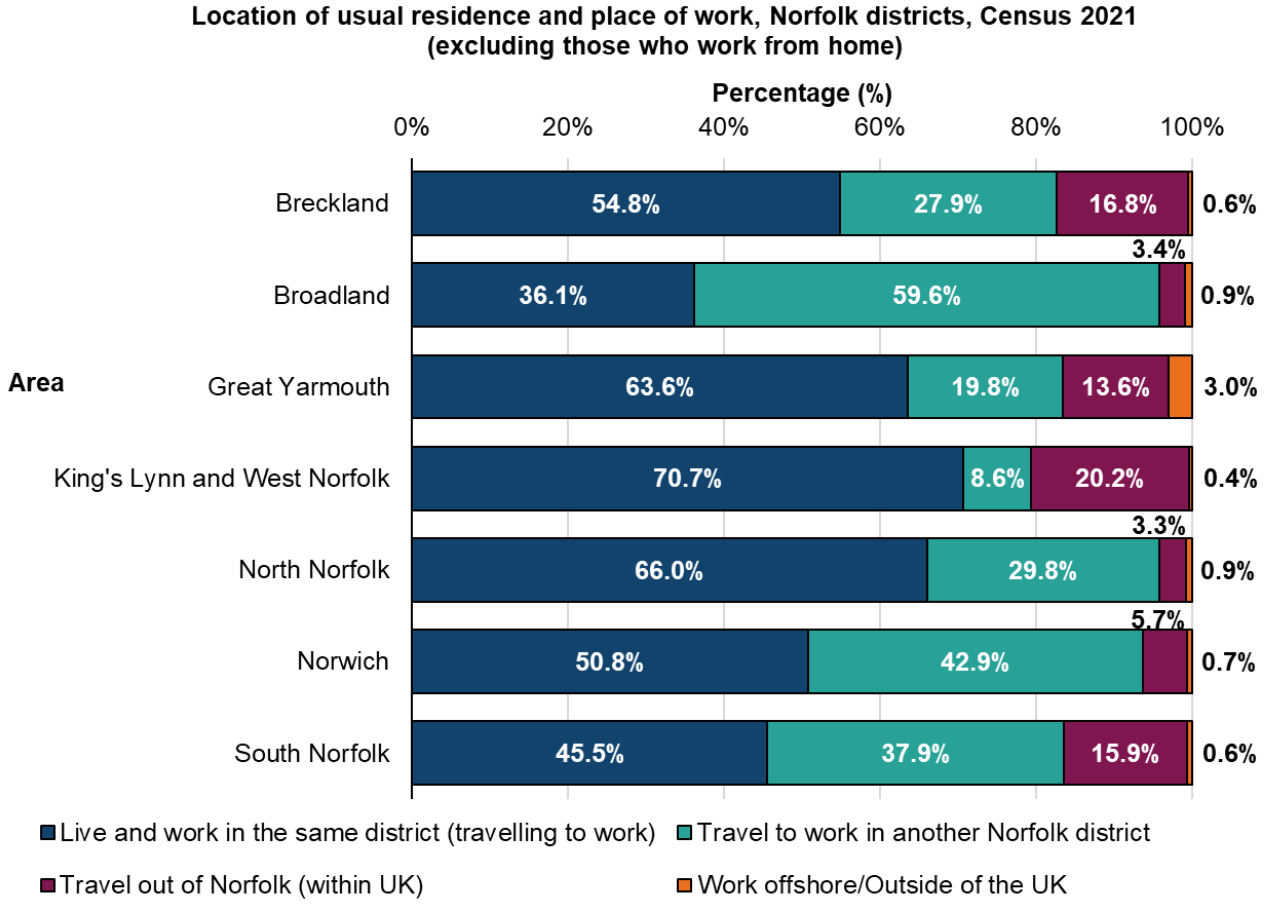
Excluding those who work from home, King's Lynn and West Norfolk and North Norfolk saw the highest proportion of people both living and working in the same district (70.7% and 66.0% respectively). Broadland had the lowest proportion of people both living and working in the same district (36.1%).

Broadland had the highest proportion of people living travelling to work in another Norfolk district (59.6%), whilst King's Lynn and West Norfolk had the lowest proportion (8.6%).

King's Lynn and West Norfolk had the highest proportion of people travel out of Norfolk but within the UK (20.2%), whilst North Norfolk and Broadland had the lowest proportion (3.3% and 3.4% respectively).

Great Yarmouth had the highest proportion of people who worked offshore/outside of the UK (3%).

Figure 94: Location of usual residence and place of work for Norfolk districts (2021 Census)



Source: Travel to work, England and Wales - Office for National Statistics and ODWP01EW from Origin-destination data, England and Wales: Census 2021 - Nomis - Official Census and Labour Market Statistics

Table 44: Location of usual residence and place of work for Norfolk districts (2021 Census)

Area	Live and work in the same district (travelling to work)	Travel to work in another Norfolk district	Travel out of Norfolk (within UK)	Work offshore/ Outside of the UK
Breckland	54.8%	27.9%	16.8%	0.6%
Broadland	36.1%	59.6%	3.4%	0.9%
Great Yarmouth	63.6%	19.8%	13.6%	3.0%
King's Lynn and West Norfolk	70.7%	8.6%	20.2%	0.4%
North Norfolk	66.0%	29.8%	3.3%	0.9%
Norwich	50.8%	42.9%	5.7%	0.7%
South Norfolk	45.5%	37.9%	15.9%	0.6%

Source: Travel to work, England and Wales - Office for National Statistics and ODWP01EW from Origin-destination data, England and Wales: Census 2021 - Nomis - Official Census and Labour Market Statistics

As above, due to the Census being taken while national lockdowns and the furlough scheme were in place, the ONS advise caution when looking at travel and working patterns, so these should be seen as estimates only.

The numbers shown are calculated on the available data with more information available here: Travel to work quality information for Census 2021 - Office for National Statistics

Emissions per kilometre (km) – Norfolk districts

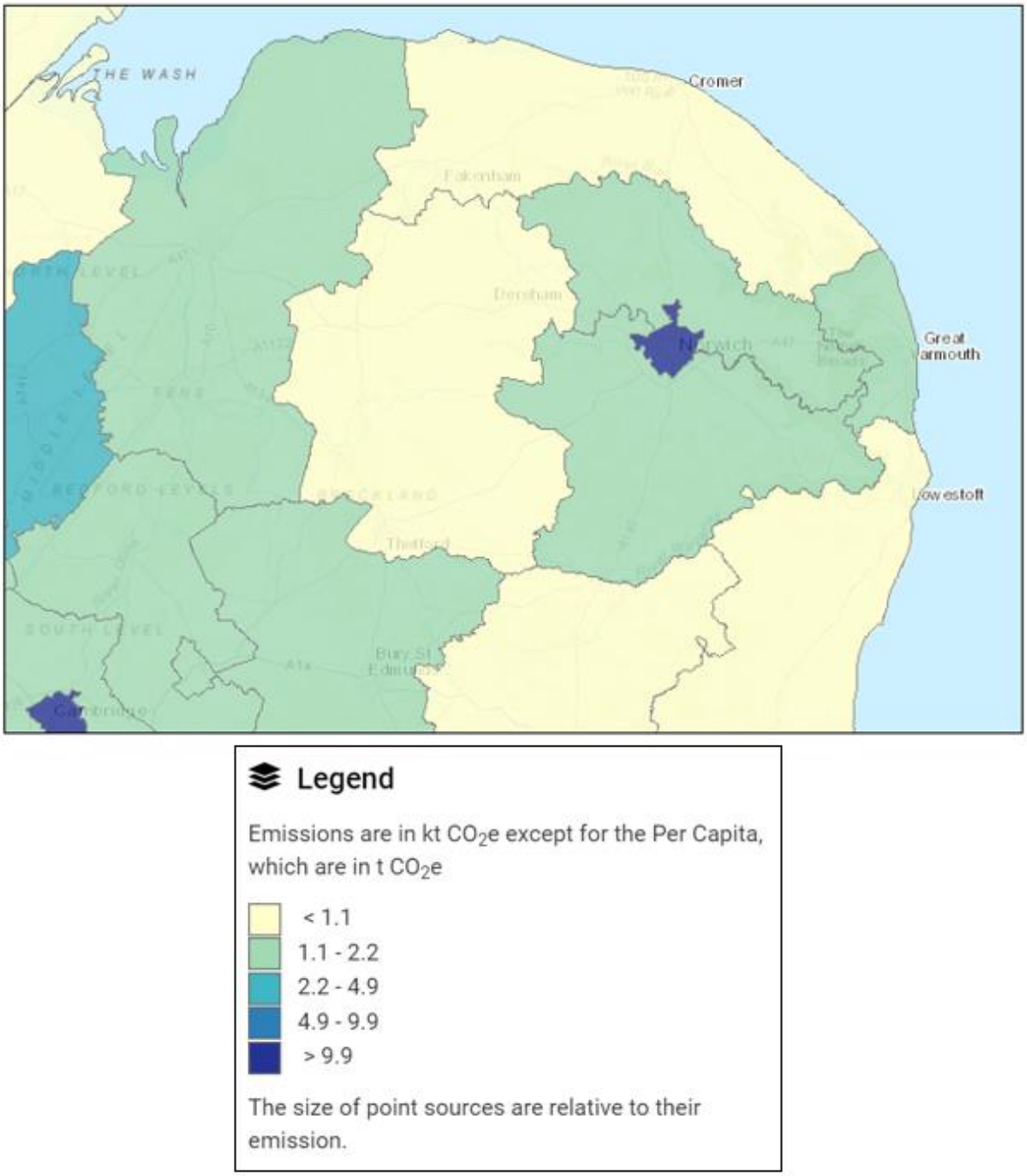
Transport is the single biggest contributor to Norfolk's carbon emissions accounting for 26%, with 92% of this being from road vehicles.

The second biggest contributor is domestic emissions (21%), followed by agriculture emissions (20%).

The Local and Regional Greenhouse Gases (GHG) interactive map show emissions for each Local Authority split by sectors. The map below (Figure 95) shows emissions per km for each Norfolk district.

The map shows far greater emissions in Norwich with lower emissions in North Norfolk and Breckland.

Figure 95: Map of Norfolk showing emissions for each Norfolk district.



Source: [Local Authority GHG Map]

The below table shows 2021 data for emissions per km (kt CO2E):

Table 45: Emissions per kilometre for Norfolk districts

Norfolk District	Emissions per km (kt CO_2e)
Breckland	0.9
Broadland	1.4
Great Yarmouth	2.2
King's Lynn and West Norfolk	1.2
North Norfolk	0.8
Norwich	12.7
South Norfolk	1.2

Source: Local Authority GHG Map

Emissions over time

The charts below show greenhouse gas emissions (kt CO_2E) between 2005 and 2021 for each Norfolk district. All below emissions graphs and data can be found here: Local Authority GHG Map .

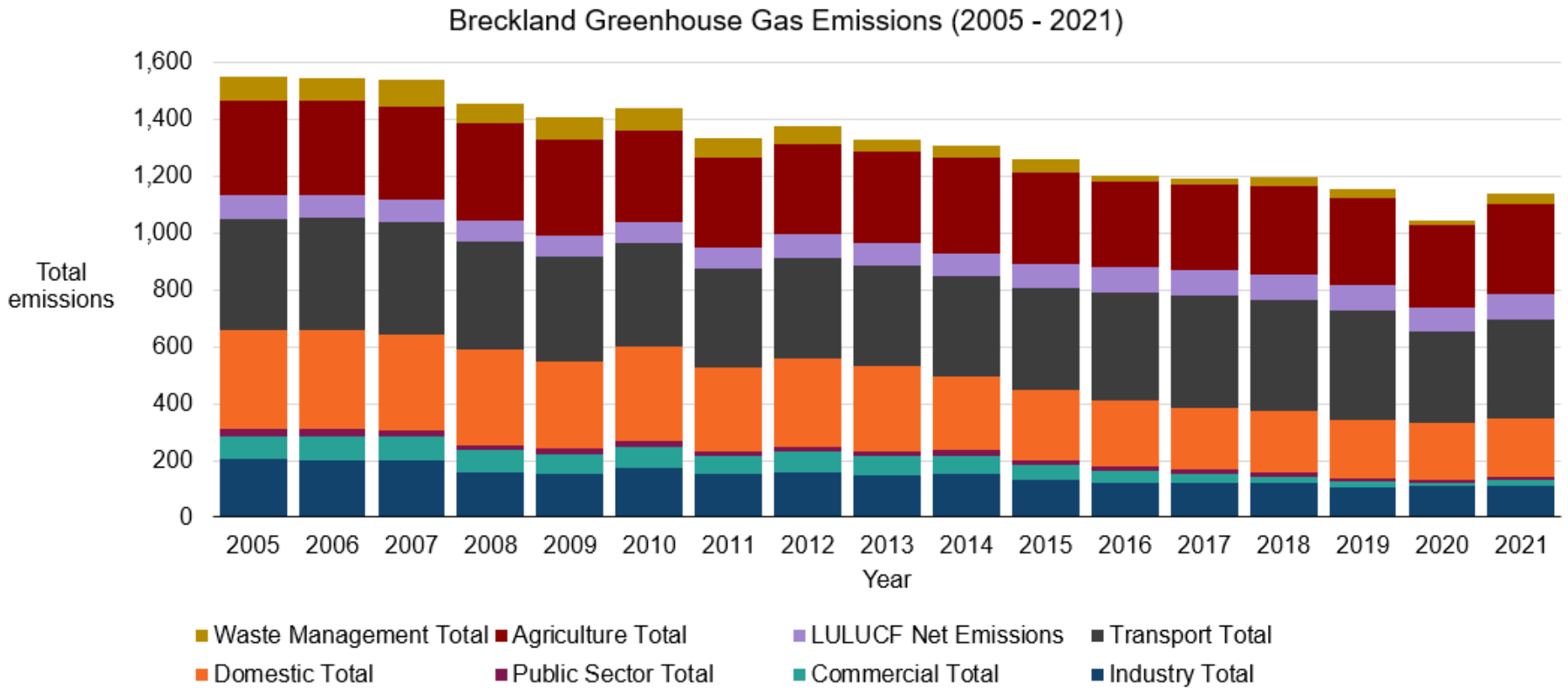
Note: The Waste Management and Agriculture sectors were included from 2018 onwards only.

LULUCF refers to 'Land Use, Land Use Change and Forestry' sector and GHG refers to Greenhouse gases.

Breckland Emissions

Breckland's greenhouse gas emissions have been on a gradual decline from 2005 to 2021. Overall, Transport, Domestic and Agriculture are the largest contributors to Breckland's total emissions. Public Sector and Commercial emissions have gradually decreased over time and are now the lowest contributors to Breckland's total emissions. LULUCF Net Emissions are the only emissions to have increased slightly from 2005 (82.3 in 2005 compared to 90.3 in 2021). A full breakdown of the data in the chart (Figure 96) can be viewed in Table 46.

Figure 96: Breckland GHG emissions (2005 to 2021)



Source: Local Authority GHG Map

Table 46: Breckland GHG emissions (2005 to 2021)

Calendar Year	Industry Total	Commercial Total	Public Sector Total	Domestic Total	Transport Total	LULUCF Net Emissions	Agriculture Total	Waste Management Total
2005	**203.5**	**82.8**	**27.4**	**343.8**	**394.3**	**82.3**	**333.9**	**81.8**
2006	199.5	85.7	26.1	349.6	395.2	80.4	330.0	77.6
2007	198.3	84.8	24.8	337.0	395.0	77.6	329.6	93.4
2008	160.7	74.2	20.7	332.9	382.5	71.6	343.2	73.0
2009	155.4	66.3	18.4	307.3	368.5	73.5	340.9	79.0
2010	174.4	72.4	20.3	332.5	365.3	74.4	323.4	75.4
2011	154.1	62.4	17.8	290.9	353.1	73.4	317.2	67.0
2012	158.5	72.0	19.8	307.3	355.6	85.4	313.3	65.6
2013	147.9	67.6	18.9	298.1	353.3	78.7	322.3	44.0
2014	153.1	65.8	18.6	257.3	354.3	80.4	336.4	43.4
2015	133.8	52.5	14.5	247.4	361.4	82.9	323.5	43.3
2016	121.5	44.1	12.6	233.8	378.5	91.0	302.3	21.8
2017	119.7	35.3	13.4	218.9	395.0	87.5	302.8	19.0
2018	123.8	20.7	13.3	214.6	390.2	90.8	311.0	31.0
2019	107.8	18.2	11.9	203.8	387.2	90.4	302.6	34.1
2020	108.1	15.6	8.7	200.6	318.9	89.3	287.3	18.2
2021	**112.6**	**17.8**	**11.4**	**205.7**	**346.8**	**90.3**	**320.2**	**37.1**

Source: Local Authority GHG Map

Table 47: Breckland emissions (2021)

Breckland (2021 Data)	Count
Per Capita Emissions (tCO_2e)	**8**
Population ('000s, mid-year estimate)	142.2
Emissions per km² (kt CO_2e)	**0.9**
Area (km²)	1305.1

Source: Local Authority GHG Map

Table 48: Breckland Greenhouse Gas emissions (2021)

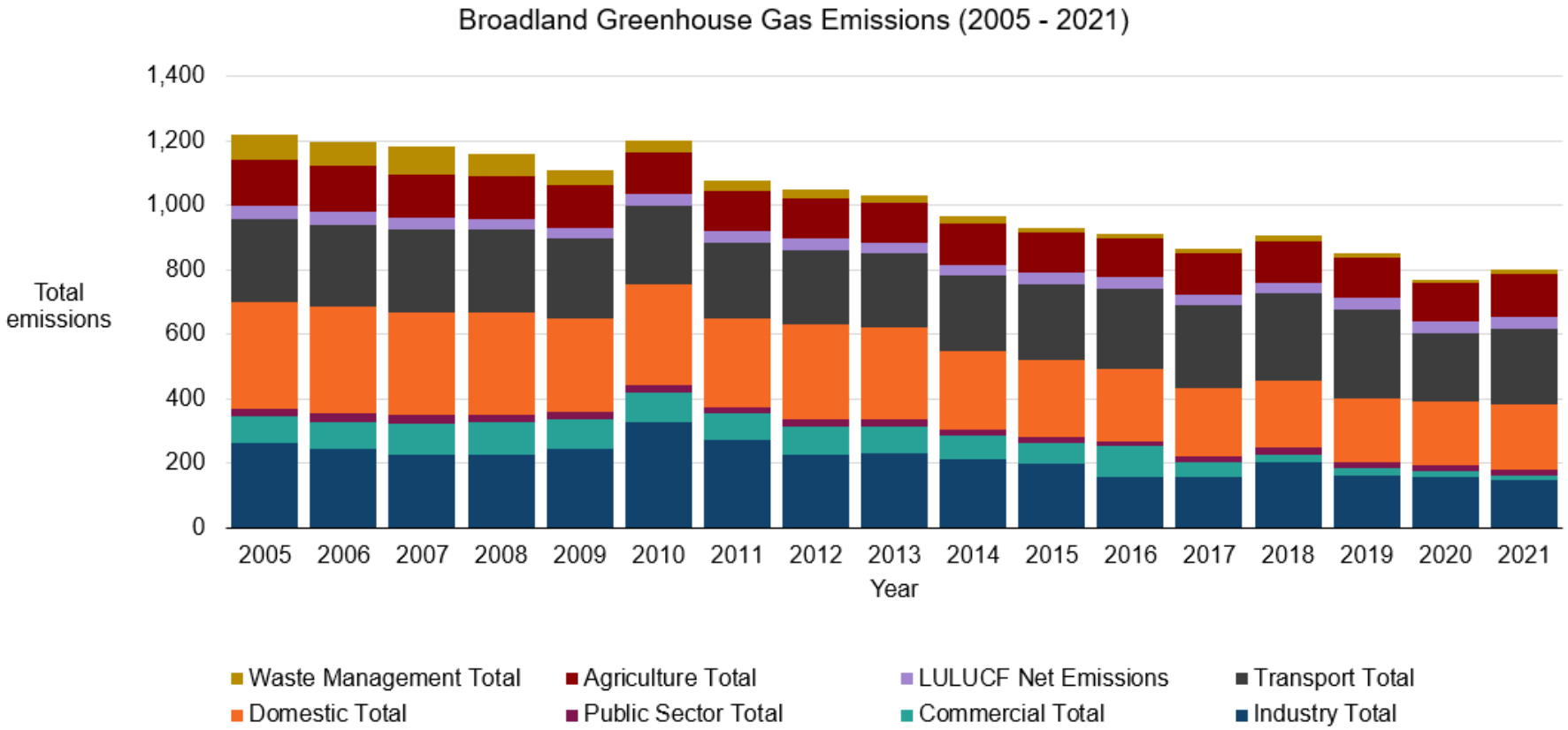
Breckland (2021 Data)	GHG emissions
Grand Total	**1141.9**
Industry Total	**112.6**
Industry Electricity	35.1
Industry Gas	18.4
Industry 'Other'	58.2
Large Industrial Installations	0.8
Commercial Total	**17.8**
Commercial Electricity	13.7
Commercial Gas	3.5
Commercial 'Other'	0.5
Public Sector Total	**11.4**
Public Sector Electricity	6.0
Public Sector Gas	5.2
Public Sector 'Other'	0.2
Domestic Total	**205.7**
Domestic Electricity	56.0
Domestic Gas	81.4
Domestic 'Other'	68.3
Transport Total	**346.8**
Road Transport (A roads)	220.3
Road Transport (Motorways)	0.0
Road Transport (Minor roads)	120.7
Diesel Railways	3.1
Transport 'Other'	2.7
LULUCF Net Emissions	**90.3**
Net Emissions: Forest land	-131.3
Net Emissions: Cropland	141.6
Net Emissions: Grassland	72.3
Net Emissions: Wetlands	0.2
Net Emissions: Settlements	6.9
Net Emissions: Harvested Wood Products	0.0
Net Emissions: Indirect N_2O	0.5
Agriculture Total	**320.2**
Agriculture Electricity	8.7
Agriculture Gas	9.5
Agriculture 'Other'	15.3
Agriculture Livestock	173.1
Agriculture Soils	113.6
Waste Management Total	**37.1**
Landfill	24.5
Waste Management 'Other'	12.6

Source: Local Authority GHG Map

Broadland Emissions

Broadland's greenhouse gas emissions have been on a gradual decline from 2005 to 2021. Overall, Transport, Domestic and Industry are the largest contributors to Broadland's total emissions. Public Sector, Waste Management and Commercial emissions have gradually decreased over time and are now the lowest contributors to Broadland's total emissions. A full breakdown of the data in the chart (Figure 97) can be viewed in Table 49.

Figure 97: Broadland GHG emissions (2005 to 2021)



Source: Local Authority GHG Map

Table 49: Broadland GHG emissions (2005 to 2021)

Calendar Year	Industry Total	Commercial Total	Public Sector Total	Domestic Total	Transport Total	LULUCF Net Emissions	Agriculture Total	Waste Management Total
2005	**264.2**	**80.4**	**23.9**	**332.4**	**258.4**	**39.1**	**144.3**	**78.5**
2006	243.1	85.7	23.5	331.7	256.6	38.7	142.6	74.1
2007	226.8	96.1	24.9	320.8	256.9	37.0	130.8	89.1
2008	225.2	99.7	25.2	318.2	254.7	34.7	135.1	69.0
2009	244.4	90.1	22.9	291.4	247.6	34.9	133.9	42.0
2010	326.2	92.0	23.0	314.8	242.8	34.9	131.4	36.7
2011	269.4	82.9	20.6	276.5	236.5	33.6	127.5	31.5
2012	227.6	87.4	21.8	293.2	232.1	35.6	126.3	26.5
2013	229.2	84.5	21.4	284.9	230.7	33.7	122.3	23.7
2014	213.5	72.6	18.8	243.3	233.5	34.3	125.5	23.4
2015	200.3	63.9	17.0	237.1	238.6	33.1	126.0	16.1
2016	158.3	95.0	13.9	227.0	247.8	35.8	118.5	13.6
2017	156.7	46.3	15.7	214.2	256.4	34.6	127.8	14.7
2018	202.0	23.6	21.1	209.8	269.8	34.9	127.6	16.7
2019	161.6	22.8	18.3	199.3	275.6	34.7	126.5	14.8
2020	156.1	19.4	15.9	198.5	214.1	34.8	118.7	13.0
2021	**145.2**	**17.5**	**16.0**	**202.6**	**237.6**	**35.2**	**131.4**	**15.2**

Source: Local Authority GHG Map

Table 50: Broadland emissions (2021)

Broadland (2021 Data)	Count
Per Capita Emissions (tCO_2e)	**6.1**
Population ('000s, mid-year estimate)	132.2
Emissions per km² (kt CO_2e)	**1.4**
Area (km²)	553.2

Source: Local Authority GHG Map

Table 51: Broadland Greenhouse Gas emissions (2021)

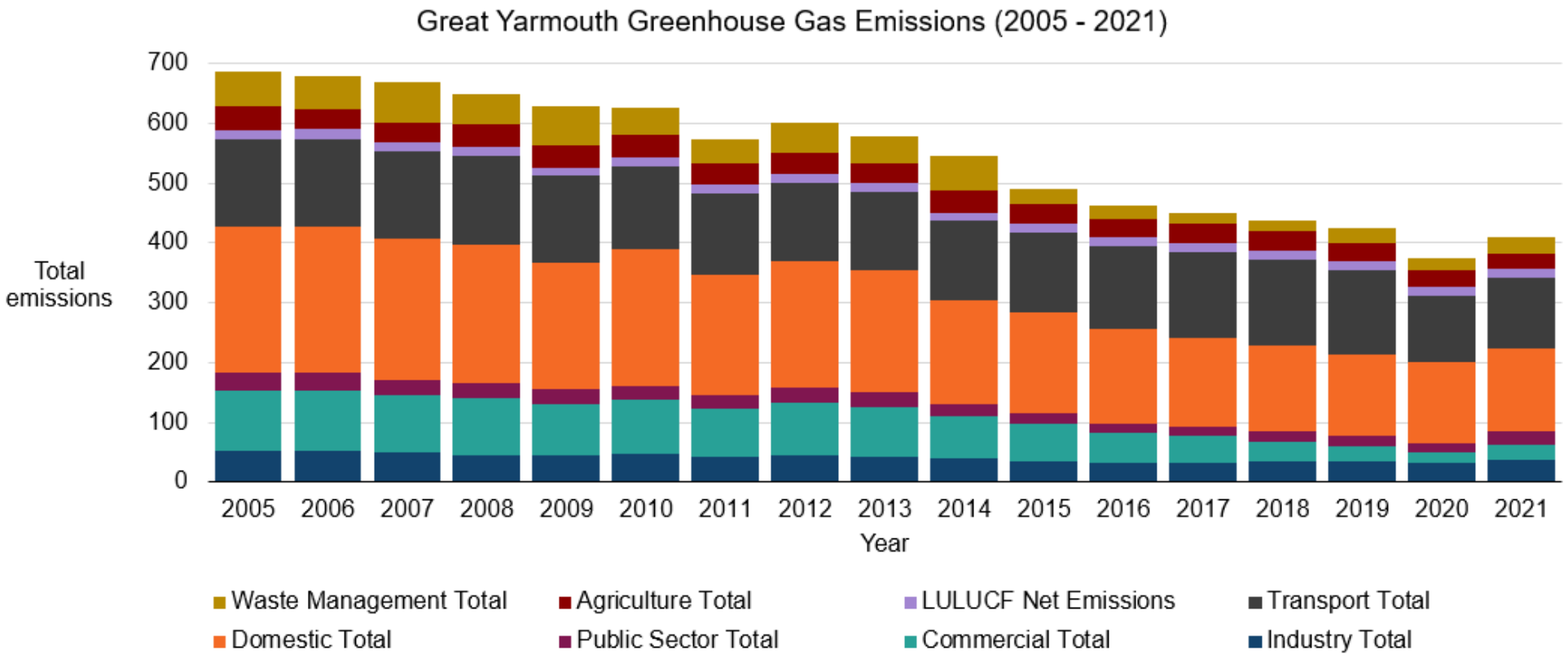
Broadland (2021 Data)	GHG emissions
Grand Total	**800.8**
Industry Total	**145.2**
Industry Electricity	20.1
Industry Gas	33.8
Industry 'Other'	32.2
Large Industrial Installations	59.1
Commercial Total	**17.5**
Commercial Electricity	13.8
Commercial Gas	3.2
Commercial 'Other'	0.6
Public Sector Total	**16.0**
Public Sector Electricity	8.2
Public Sector Gas	7.8
Public Sector 'Other'	0.1
Domestic Total	**202.6**
Domestic Electricity	48.9
Domestic Gas	116.6
Domestic 'Other'	37.2
Transport Total	**237.6**
Road Transport (A roads)	127.9
Road Transport (Motorways)	0.0
Road Transport (Minor roads)	77.0
Diesel Railways	2.7
Transport 'Other'	30.1
LULUCF Net Emissions	**35.2**
Net Emissions: Forest land	-39.8
Net Emissions: Cropland	44.0
Net Emissions: Grassland	20.9
Net Emissions: Wetlands	4.1
Net Emissions: Settlements	5.8
Net Emissions: Harvested Wood Products	0.0
Net Emissions: Indirect N_2O	0.3
Agriculture Total	**131.4**
Agriculture Electricity	3.9
Agriculture Gas	0.3
Agriculture 'Other'	8.3
Agriculture Livestock	72.2
Agriculture Soils	46.7
Waste Management Total	**15.2**
Landfill	4.8
Waste Management 'Other'	10.4

Source: Local Authority GHG Map

Great Yarmouth Emissions

Great Yarmouth's greenhouse gas emissions have been on a gradual decline from 2005 to 2021. Overall, Transport and Domestic are the largest contributors to Great Yarmouth's total emissions. All sectors have seen a gradual decrease in emissions since 2005; Commercial has seen the largest decrease (25.2 in 2021 compared to 100.5 in 2005). A full breakdown of the data in the chart (Figure 98) can be viewed in Table 52.

Figure 98: Great Yarmouth GHG emissions (2005 to 2021)



Source: Local Authority GHG Map

Table 52: Great Yarmouth GHG emissions (2005 to 2021)

Calendar Year	Industry Total	Commercial Total	Public Sector Total	Domestic Total	Transport Total	LULUCF Net Emissions	Agriculture Total	Waste Management Total
2005	**53.1**	**100.5**	**29.4**	**243.3**	**145.6**	**16.1**	**40.1**	**59.4**
2006	52.5	101.5	28.0	244.8	147.3	15.7	33.1	55.8
2007	50.3	94.2	26.0	235.8	146.3	15.2	33.3	67.2
2008	45.8	94.2	25.9	232.1	147.7	14.7	37.1	52.0
2009	44.0	85.8	25.0	212.8	144.1	14.6	37.6	63.9
2010	46.8	89.9	24.9	228.3	138.6	14.6	37.3	46.5
2011	42.6	81.2	22.9	200.5	135.9	14.2	35.7	41.0
2012	44.2	88.8	24.6	211.3	131.5	14.6	36.2	49.3
2013	41.8	83.9	24.9	203.9	130.9	14.1	34.3	44.3
2014	38.5	71.1	21.6	173.3	132.3	14.1	36.4	57.0
2015	35.5	61.8	18.3	166.9	135.0	13.8	34.0	24.9
2016	31.8	51.3	15.5	156.8	138.7	14.3	31.6	23.1
2017	31.9	44.9	15.8	148.6	144.5	14.2	31.7	18.8
2018	34.9	31.6	19.7	143.4	143.1	14.3	31.9	17.5
2019	34.9	24.6	18.1	136.2	140.2	14.1	30.7	26.1
2020	31.9	17.2	16.1	135.3	112.0	14.0	27.9	20.8
2021	**36.1**	**25.2**	**23.0**	**138.1**	**120.2**	**14.0**	**25.6**	**26.3**

Source: Local Authority GHG Map

Table 53: Great Yarmouth emissions (2021)

Great Yarmouth (2021 Data)	Count
Per Capita Emissions (tCO_2e)	**4.1**
Population ('000s, mid-year estimate)	100.1
Emissions per km² (kt CO_2e)	**2.2**
Area (km²)	182.4

Source: Local Authority GHG Map

Table 54: Great Yarmouth Greenhouse Gas emissions (2021)

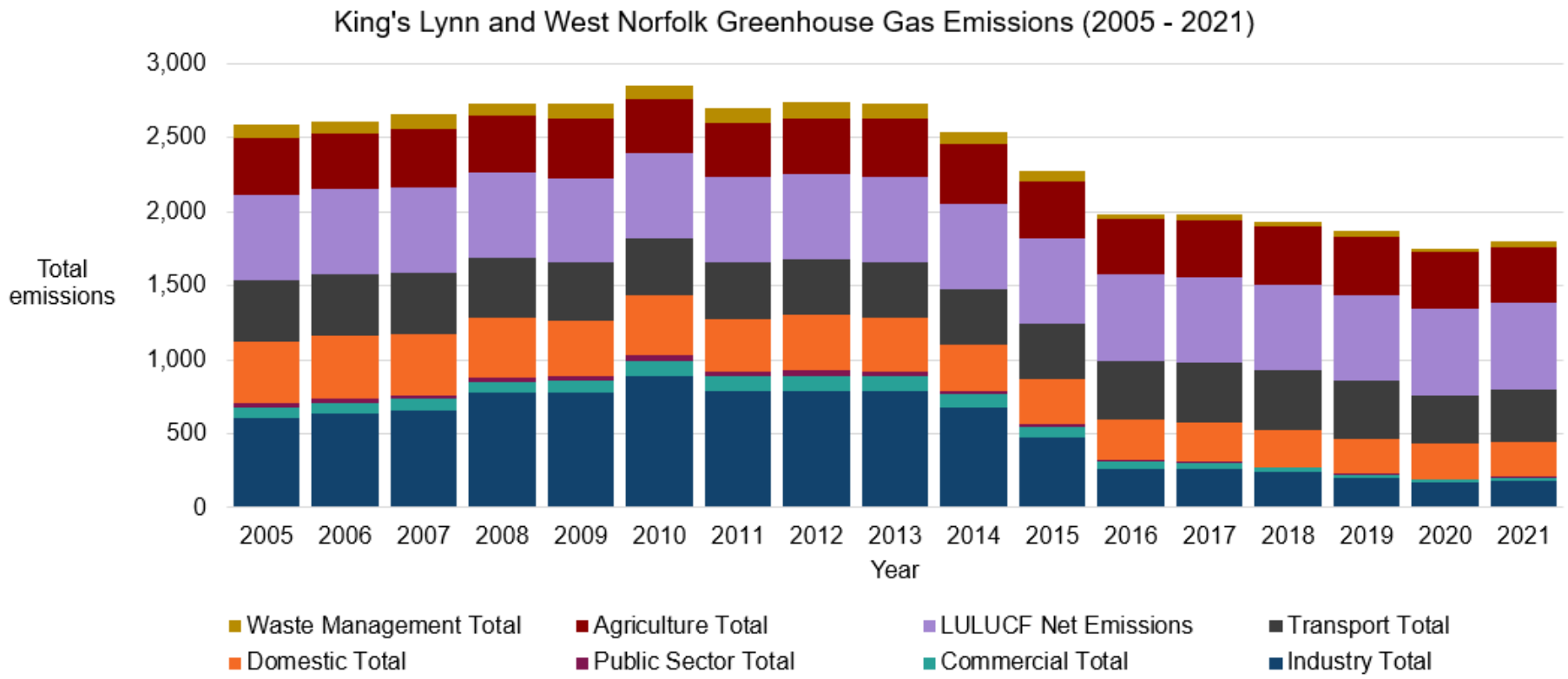
Great Yarmouth (2021 Data)	GHG emissions
Grand Total	**408.5**
Industry Total	**36.1**
Industry Electricity	12.3
Industry Gas	6.7
Industry 'Other'	17.1
Large Industrial Installations	0.0
Commercial Total	**25.2**
Commercial Electricity	16.0
Commercial Gas	8.8
Commercial 'Other'	0.3
Public Sector Total	**23.0**
Public Sector Electricity	5.7
Public Sector Gas	17.1
Public Sector 'Other'	0.2
Domestic Total	**138.1**
Domestic Electricity	36.0
Domestic Gas	74.2
Domestic 'Other'	27.9
Transport Total	**120.2**
Road Transport (A roads)	57.4
Road Transport (Motorways)	0.0
Road Transport (Minor roads)	40.2
Diesel Railways	0.2
Transport 'Other'	22.4
LULUCF Net Emissions	**14.0**
Net Emissions: Forest land	-6.4
Net Emissions: Cropland	12.7
Net Emissions: Grassland	1.3
Net Emissions: Wetlands	3.3
Net Emissions: Settlements	3.0
Net Emissions: Harvested Wood Products	0.0
Net Emissions: Indirect N_2O	0.1
Agriculture Total	**25.6**
Agriculture Electricity	1.8
Agriculture Gas	0.0
Agriculture 'Other'	3.0
Agriculture Livestock	10.7
Agriculture Soils	10.1
Waste Management Total	**26.3**
Landfill	22.3
Waste Management 'Other'	4.0

Source: Local Authority GHG Map

King's Lynn and West Norfolk Emissions

King's Lynn and West Norfolk's greenhouse gas emissions remained around the same level until 2014, where there has since been a gradual decline. Overall, LULUCF, Agriculture, Transport and Domestic are the largest contributors to King's Lynn and West Norfolk's total emissions. Industry was one of the largest contributors in 2005, however this sector has seen the biggest decrease in emissions (605.6 in 2005 compared to 179.7 in 2021). Agriculture and LULUCF Net Emissions are the only emissions to have increased slightly from 2005. A full breakdown of the data in the chart (Figure 99) can be seen in Table 55.

Figure 99: King's Lynn and West Norfolk GHG emissions (2005 to 2021)



Source: Local Authority GHG Map

Table 55: King's Lynn and West Norfolk GHG emissions (2005 to 2021)

Calendar Year	Industry Total	Commercial Total	Public Sector Total	Domestic Total	Transport Total	LULUCF Net Emissions	Agriculture Total	Waste Management Total
2005	**605.6**	**73.5**	**27.3**	**415.2**	**416.2**	**578.1**	**377.2**	**91.9**
2006	636.9	72.8	25.9	425.5	413.3	578.7	373.3	87.0
2007	661.4	75.2	26.3	409.7	419.2	576.0	387.6	104.8
2008	776.2	73.4	26.9	406.3	406.5	571.2	388.2	81.8
2009	780.2	79.4	27.5	373.8	393.7	575.3	401.0	96.0
2010	886.8	108.6	33.8	404.8	389.6	575.9	363.0	91.7
2011	793.3	100.0	31.2	353.9	378.9	574.2	366.4	104.4
2012	785.2	109.5	32.2	373.5	377.5	579.0	371.1	112.8
2013	790.3	102.1	31.1	361.3	375.7	575.6	394.7	103.2
2014	679.9	85.9	26.3	311.2	377.3	576.3	397.6	82.2
2015	478.4	71.2	19.2	296.2	383.9	575.3	377.4	70.0
2016	261.8	52.5	9.5	277.1	395.0	580.5	373.7	32.3
2017	263.9	39.2	11.7	258.7	402.6	579.1	388.0	34.6
2018	241.8	26.5	9.1	252.0	397.8	580.1	389.0	32.3
2019	197.8	22.5	8.4	238.2	393.9	579.4	394.0	33.6
2020	169.9	18.6	7.1	234.1	330.1	580.6	385.2	26.9
2021	**179.7**	**20.9**	**8.2**	**240.2**	**353.7**	**581.6**	**380.4**	**35.5**

Source: Local Authority GHG Map

Table 56: King's Lynn and West Norfolk emissions (2021)

King's Lynn and West Norfolk (2021 Data)	Count
Per Capita Emissions (tCO_2e)	**11.6**
Population ('000s, mid-year estimate)	154.9
Emissions per km² (kt CO_2e)	**1.2**
Area (km²)	1526.9

Source: Local Authority GHG Map

Table 57: King's Lynn and West Norfolk Greenhouse Gas emissions (2021)

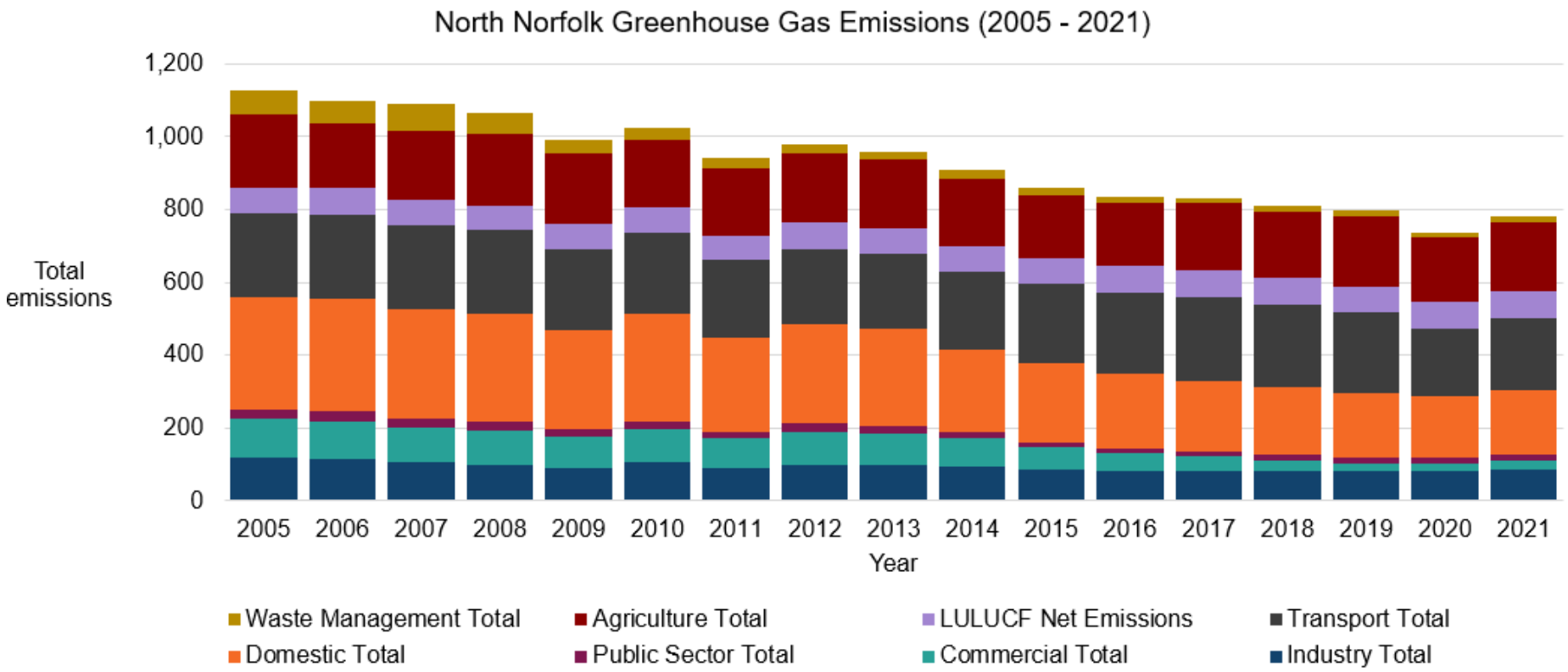
King's Lynn and West Norfolk (2021 Data)	GHG emissions
Grand Total	**1800.2**
Industry Total	**179.7**
Industry Electricity	61.1
Industry Gas	46.3
Industry 'Other'	44.6
Large Industrial Installations	27.8
Commercial Total	**20.9**
Commercial Electricity	19.7
Commercial Gas	0.5
Commercial 'Other'	0.7
Public Sector Total	**8.2**
Public Sector Electricity	6.7
Public Sector Gas	1.3
Public Sector 'Other'	0.2
Domestic Total	**240.2**
Domestic Electricity	69.6
Domestic Gas	90.0
Domestic 'Other'	80.6
Transport Total	**353.7**
Road Transport (A roads)	207.1
Road Transport (Motorways)	0.0
Road Transport (Minor roads)	133.4
Diesel Railways	0.5
Transport 'Other'	12.8
LULUCF Net Emissions	**581.6**
Net Emissions: Forest land	-53.5
Net Emissions: Cropland	581.9
Net Emissions: Grassland	43.6
Net Emissions: Wetlands	0.7
Net Emissions: Settlements	8.4
Net Emissions: Harvested Wood Products	0.0
Net Emissions: Indirect N_2O	0.5
Agriculture Total	**380.4**
Agriculture Electricity	9.5
Agriculture Gas	0.0
Agriculture 'Other'	19.5
Agriculture Livestock	144.8
Agriculture Soils	206.6
Waste Management Total	**35.5**
Landfill	24.2
Waste Management 'Other'	11.3

Source: Local Authority GHG Map

North Norfolk Emissions

North Norfolk's greenhouse gas emissions have been on a gradual decline from 2005 to 2021. Overall, Transport, Agriculture and Domestic are the largest contributors to North Norfolk's total emissions. All sectors have seen a gradual decrease in emissions since 2005; Commercial and Waste Management have seen the biggest decrease in emissions. A full breakdown of the data in the chart (Figure 100) can be seen in Table 58.

Figure 100: North Norfolk GHG emissions (2005 to 2021)



Source: Local Authority GHG Map

Table 58: North Norfolk GHG emissions (2005 to 2021)

Calendar Year	Industry Total	Commercial Total	Public Sector Total	Domestic Total	Transport Total	LULUCF Net Emissions	Agriculture Total	Waste Management Total
2005	**118.5**	**107.3**	**26.8**	**308.1**	**227.4**	**73.4**	**202.2**	**65.3**
2006	113.7	106.0	25.5	309.8	229.8	73.8	177.9	61.8
2007	105.8	96.8	23.2	299.9	230.4	71.6	189.5	74.1
2008	98.0	97.0	22.0	297.0	228.8	68.4	196.2	57.9
2009	90.8	85.1	19.6	273.3	222.2	70.4	194.8	33.5
2010	105.5	92.7	21.7	295.8	219.8	70.9	187.0	29.8
2011	91.4	79.6	19.2	258.8	211.7	69.5	183.6	26.9
2012	100.0	91.2	21.4	273.8	206.6	72.9	187.6	25.9
2013	100.4	85.7	20.5	265.2	207.7	70.3	188.0	22.3
2014	95.0	76.0	18.1	226.7	212.3	70.5	186.7	23.2
2015	84.3	62.3	15.1	217.9	216.3	69.2	175.7	18.8
2016	80.7	50.7	13.3	204.1	223.3	73.7	174.0	16.4
2017	81.1	41.3	15.4	191.7	230.6	72.6	184.4	15.8
2018	83.4	27.2	15.8	186.7	226.9	72.4	182.9	16.9
2019	81.5	23.3	14.9	175.5	223.8	71.3	191.2	15.4
2020	81.7	21.4	14.4	172.1	184.7	71.4	178.1	13.8
2021	**85.5**	**26.4**	**16.1**	**176.7**	**198.0**	**72.2**	**191.2**	**16.8**

Source: Local Authority GHG Map

Table 59: North Norfolk emissions (2021)

North Norfolk (2021 Data)	Count
Per Capita Emissions (tCO_2e)	**7.6**
Population ('000s, mid-year estimate)	103.3
Emissions per km² (kt CO_2e)	**0.8**
Area (km²)	990

Source: Local Authority GHG Map

Table 60: North Norfolk Greenhouse Gas emissions (2021)

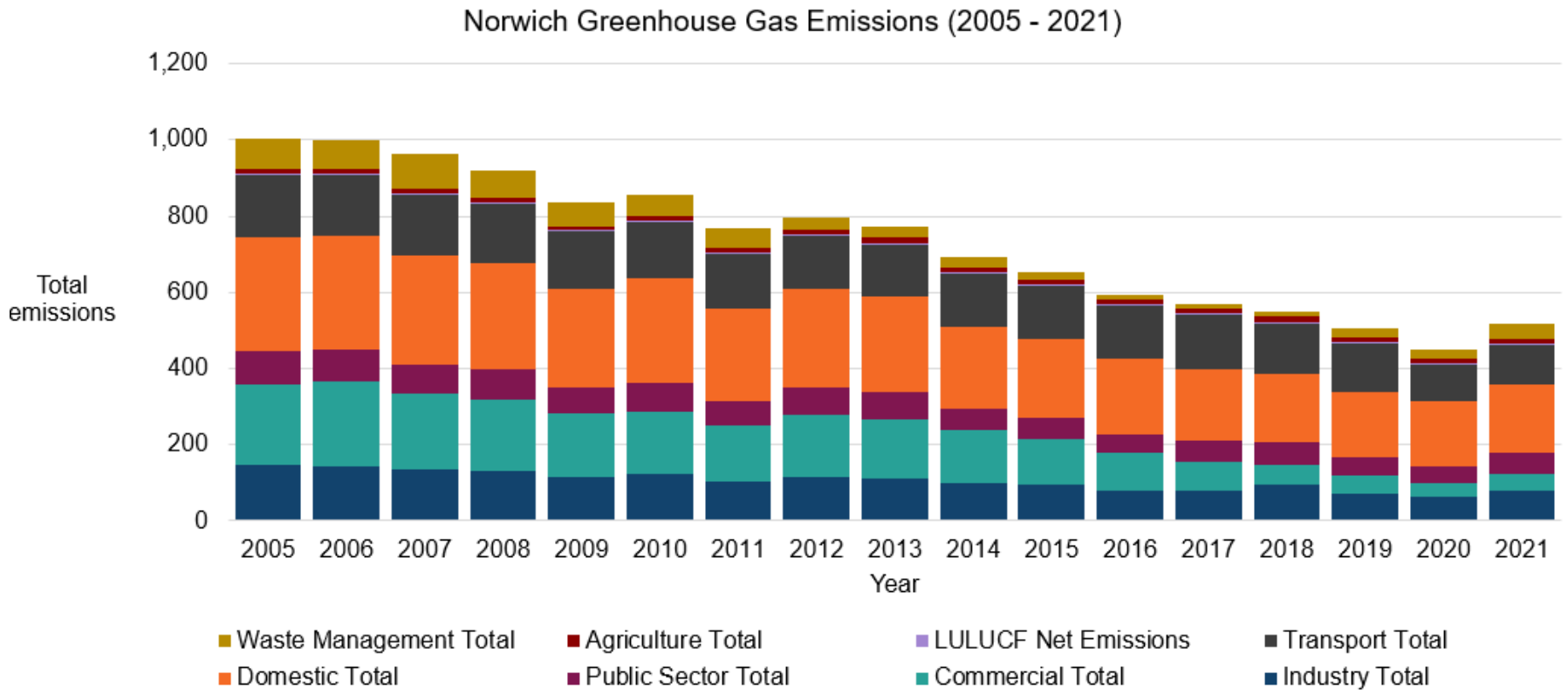
North Norfolk (2021 Data)	GHG emissions
Grand Total	**782.9**
Industry Total	**85.5**
Industry Electricity	24.2
Industry Gas	28.6
Industry 'Other'	32.6
Large Industrial Installations	0.0
Commercial Total	**26.4**
Commercial Electricity	21.3
Commercial Gas	4.5
Commercial 'Other'	0.6
Public Sector Total	**16.1**
Public Sector Electricity	8.4
Public Sector Gas	7.5
Public Sector 'Other'	0.2
Domestic Total	**176.7**
Domestic Electricity	51.2
Domestic Gas	67.1
Domestic 'Other'	58.5
Transport Total	**198.0**
Road Transport (A roads)	75.6
Road Transport (Motorways)	0.0
Road Transport (Minor roads)	94.9
Diesel Railways	0.7
Transport 'Other'	26.8
LULUCF Net Emissions	**72.2**
Net Emissions: Forest land	-62.0
Net Emissions: Cropland	81.4
Net Emissions: Grassland	31.4
Net Emissions: Wetlands	15.1
Net Emissions: Settlements	5.8
Net Emissions: Harvested Wood Products	0.0
Net Emissions: Indirect N_2O	0.4
Agriculture Total	**191.2**
Agriculture Electricity	12.8
Agriculture Gas	0.8
Agriculture 'Other'	14.8
Agriculture Livestock	83.9
Agriculture Soils	79.0
Waste Management Total	**16.8**
Landfill	4.8
Waste Management 'Other'	12.0

Source: Local Authority GHG Map

Norwich Emissions

Norwich's greenhouse gas emissions have been on a gradual decline from 2005 to 2021. Overall, Domestic and Transport are the largest contributors to Norwich's total emissions. Commercial was one of the largest contributors to GHG emissions in 2005, however this sector has seen the biggest decrease (211.4 in 2005 compared to 44.7 in 2021). Agriculture is the only sector where emissions have increased slightly from 2005 (10.9 in 2005 compared to 12.7 in 2021). A full breakdown of the data in the chart (Figure 101) can be viewed in Table 61.

Figure 101: Norwich GHG emissions (2005 to 2021)



Source: Local Authority GHG Map

Table 61: Norwich GHG emissions (2005 to 2021)

Calendar Year	Industry Total	Commercial Total	Public Sector Total	Domestic Total	Transport Total	LULUCF Net Emissions	Agriculture Total	Waste Management Total
2005	**146.1**	**211.4**	**88.0**	**297.8**	**163.4**	**4.3**	**10.9**	**80.1**
2006	144.4	220.8	84.7	297.5	160.1	4.2	10.9	75.6
2007	135.2	198.0	77.2	286.2	160.1	4.1	12.3	90.5
2008	129.9	189.8	76.6	281.5	154.4	3.9	11.5	70.3
2009	116.9	166.4	68.7	255.9	150.8	3.8	11.8	62.1
2010	123.0	165.6	73.3	276.4	146.7	3.8	12.3	53.1
2011	105.3	147.4	61.6	243.2	144.3	3.6	11.1	53.5
2012	115.2	165.4	68.2	259.4	141.3	3.5	11.7	33.3
2013	112.0	156.0	68.4	251.6	138.1	3.3	14.1	30.5
2014	100.5	136.6	59.0	212.8	139.1	3.3	13.6	27.1
2015	95.9	117.1	55.8	208.4	139.9	3.1	13.7	20.8
2016	80.0	98.2	47.8	198.6	140.3	3.1	12.4	13.1
2017	78.3	78.8	55.7	186.5	141.3	3.1	13.1	12.3
2018	94.8	54.2	58.1	180.5	131.4	3.1	14.0	13.6
2019	72.4	46.9	46.8	172.8	125.9	3.0	13.8	22.7
2020	65.4	35.2	41.7	172.3	96.4	3.1	11.4	25.1
2021	**79.8**	**44.7**	**56.4**	**176.5**	**104.7**	**3.1**	**12.7**	**38.6**

Source: Local Authority GHG Map

Table 62: Norwich emissions (2021)

Norwich (2021 Data)	Count
Per Capita Emissions (tCO_2e)	**3.6**
Population ('000s, mid-year estimate)	143.1
Emissions per km² (kt CO_2e)	**12.7**
Area (km²)	40.6

Source: Local Authority GHG Map

Table 63: Norwich Greenhouse Gas emissions (2021)

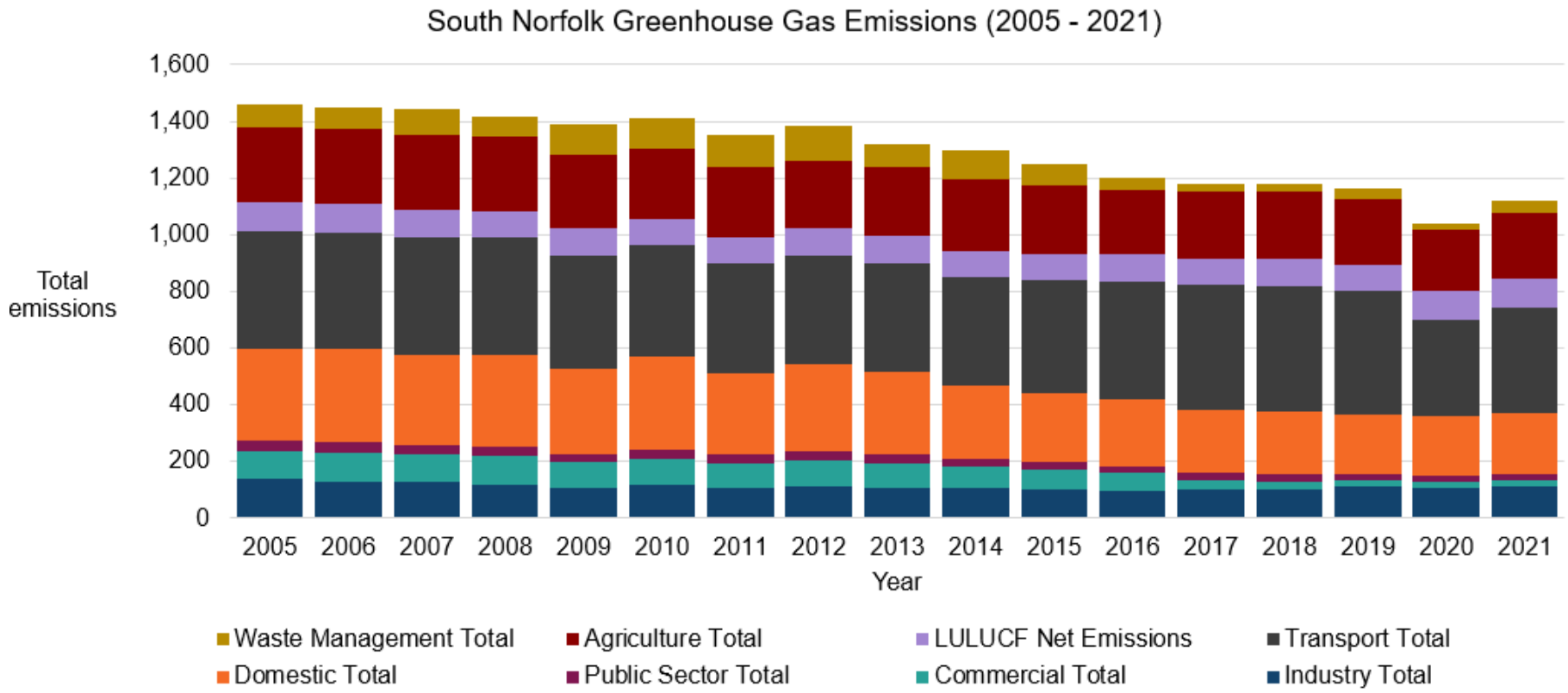
Norwich (2021 Data)	GHG emissions
Grand Total	**516.5**
Industry Total	**79.8**
Industry Electricity	17.6
Industry Gas	40.1
Industry 'Other'	22.0
Large Industrial Installations	0.0
Commercial Total	**44.7**
Commercial Electricity	32.1
Commercial Gas	12.0
Commercial 'Other'	0.7
Public Sector Total	**56.4**
Public Sector Electricity	12.1
Public Sector Gas	44.4
Public Sector 'Other'	0.0
Domestic Total	**176.5**
Domestic Electricity	41.7
Domestic Gas	128.1
Domestic 'Other'	6.6
Transport Total	**104.7**
Road Transport (A roads)	55.7
Road Transport (Motorways)	0.0
Road Transport (Minor roads)	42.0
Diesel Railways	0.6
Transport 'Other'	6.4
LULUCF Net Emissions	**3.1**
Net Emissions: Forest land	-1.9
Net Emissions: Cropland	0.7
Net Emissions: Grassland	1.2
Net Emissions: Wetlands	0.0
Net Emissions: Settlements	3.0
Net Emissions: Harvested Wood Products	0.0
Net Emissions: Indirect N_2O	0.0
Agriculture Total	**12.7**
Agriculture Electricity	0.2
Agriculture Gas	0.3
Agriculture 'Other'	0.3
Agriculture Livestock	7.9
Agriculture Soils	4.0
Waste Management Total	**38.6**
Landfill	32.3
Waste Management 'Other'	6.3

Source: Local Authority GHG Map

South Norfolk Emissions

South Norfolk's greenhouse gas emissions have overall been on a gradual decline from 2005 to 2021. Transport, Agriculture and Domestic are the largest contributors to South Norfolk's total emissions. All sectors have seen a gradual decrease in emissions since 2005; Commercial has seen the biggest decrease in emissions (98.2 in 2005 compared to 19.9 in 2021). A full breakdown of the data in the chart (Figure 102) can be viewed in Table 64.

Figure 102: South Norfolk GHG emissions (2005 to 2021)



Source: Local Authority GHG Map

Table 64: South Norfolk GHG emissions (2005 to 2021)

Calendar Year	Industry Total	Commercial Total	Public Sector Total	Domestic Total	Transport Total	LULUCF Net Emissions	Agriculture Total	Waste Management Total
2005	**137.3**	**98.2**	**37.8**	**323.7**	**418.3**	**99.6**	**266.6**	**77.1**
2006	131.4	102.5	35.4	330.2	409.5	100.2	264.4	73.2
2007	127.4	96.5	33.6	320.1	415.1	98.0	263.2	88.1
2008	118.6	102.0	33.0	322.1	414.0	94.7	262.5	70.1
2009	109.3	88.7	29.3	300.1	401.3	96.7	255.4	111.7
2010	117.9	91.2	31.6	327.6	393.3	96.3	248.2	103.2
2011	109.2	85.3	30.5	286.4	387.1	94.6	245.5	116.2
2012	111.8	94.8	32.0	303.5	383.0	95.9	241.6	123.8
2013	107.2	86.1	31.2	294.5	380.4	94.6	242.3	84.1
2014	108.2	75.4	28.9	255.6	382.0	94.8	248.9	102.4
2015	103.7	66.6	26.4	247.0	397.5	93.0	242.4	73.1
2016	98.0	62.3	22.2	235.0	416.9	97.0	225.9	42.0
2017	100.6	35.4	26.8	221.3	437.3	96.6	234.8	25.8
2018	104.9	24.9	27.4	219.2	441.2	97.2	236.8	29.2
2019	111.2	21.8	24.7	208.1	434.3	96.5	231.7	33.4
2020	110.2	19.1	23.1	206.8	343.1	97.8	219.3	22.7
2021	**112.2**	**19.9**	**25.5**	**212.7**	**375.2**	**98.4**	**231.7**	**42.5**

Source: Local Authority GHG Map

Table 65: South Norfolk emissions (2021)

South Norfolk (2021 Data)	Count
Per Capita Emissions (tCO_2e)	**7.8**
Population ('000s, mid-year estimate)	142.5
Emissions per km² (kt CO_2e)	**1.2**
Area (km²)	908.9

Source: Local Authority GHG Map

Table 66: South Norfolk Greenhouse Gas emissions (2021)

South Norfolk (2021 Data)	GHG emissions
Grand Total	**1118.1**
Industry Total	**112.2**
Industry Electricity	20.0
Industry Gas	17.8
Industry 'Other'	73.8
Large Industrial Installations	0.6
Commercial Total	**19.9**
Commercial Electricity	16.8
Commercial Gas	2.4
Commercial 'Other'	0.7
Public Sector Total	**25.5**
Public Sector Electricity	8.0
Public Sector Gas	17.3
Public Sector 'Other'	0.2
Domestic Total	**212.7**
Domestic Electricity	57.7
Domestic Gas	86.6
Domestic 'Other'	68.4
Transport Total	**375.2**
Road Transport (A roads)	233.5
Road Transport (Motorways)	0.0
Road Transport (Minor roads)	107.8
Diesel Railways	2.3
Transport 'Other'	31.6
LULUCF Net Emissions	**98.4**
Net Emissions: Forest land	-38.0
Net Emissions: Cropland	64.9
Net Emissions: Grassland	63.6
Net Emissions: Wetlands	0.4
Net Emissions: Settlements	7.0
Net Emissions: Harvested Wood Products	0.0
Net Emissions: Indirect N_2O	0.4
Agriculture Total	**231.7**
Agriculture Electricity	15.9
Agriculture Gas	10.6
Agriculture 'Other'	15.0
Agriculture Livestock	114.1
Agriculture Soils	76.2
Waste Management Total	**42.5**
Landfill	25.9
Waste Management 'Other'	16.6

Source: Local Authority GHG Map

Strategic Alignment

District Priorities

Borough Council of Great Yarmouth Corporate Plan: The Plan 2020 - 2025

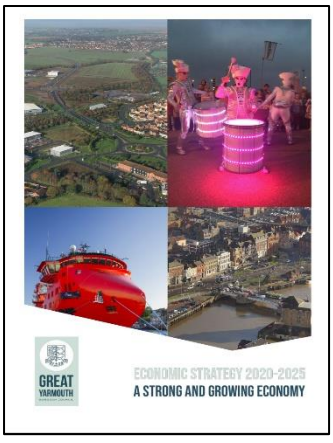
The main themes of this plan are:

- A strong and growing economy – growth and impact of offshore energy sector, year-round tourism offer, enhancing culture and heritage offer.
- Improved housing and strong communities – improve range and quality of housing and supporting community self-sufficiency.
- High-quality and sustainable environment – relationship to coastline, the broads and mitigating climate change.
- An efficient and effective council – ambition, clear direction and value for money.

Example outcomes of this plan are:

- To have secured new inward investment in the borough.
- Improved median wage levels in Great Yarmouth and increased the number of local people accessing better paid work.
- Support Great Yarmouth and Gorleston town centres as important community hubs and places where people choose to live as well as work, shop and undertake leisure activities.
- A thriving visitor economy with an extended season beyond the peak summer period.
- Improved the health and well-being of residents.
-

Borough Council of Great Yarmouth Economic Plan: Economic Strategy 2020-2025



The Strategy is to lead a placemaking agenda that changes how Great Yarmouth is perceived and understood by residents, visitors, existing and new businesses, investors, and workforces. Its leadership resides with the Economic Development Committee and is realised through delivery of the Economic Growth Action Plan. Its implementation is reported to and monitored by the Economic Reference Group, whose membership comprises delivery partners and stakeholders.

Example outcomes of this plan are:

- To have secured new inward investment in the Borough, creating a vibrant economy and matching local skills provision with future job and career opportunities.
- To support Great Yarmouth and Gorleston town centres as important community hubs and places where people choose to live as well as work, shop and undertake leisure activities.
- Improved median wage levels in Great Yarmouth and increased the number of local people accessing better paid work.
- A thriving visitor economy with an extended season beyond the peak summer period.

Borough Council of Great Yarmouth Local Plan: Emerging Local Plan 2021 - 2040

The plan sets out a strategy to meet the target of 7,200 new homes over the plan period (2021-2041) by identifying sufficient land for 7,500 homes. New homes will be planned across the Borough approximately as follows:

- Urban area of Great Yarmouth, Gorleston and Bradwell – 45% of housing growth
- Caister-on-Sea - 20% of housing growth
- Villages - 35% of housing growth

The council will work with partners to deliver the borough's regeneration and growth ambitions across the urban area and has identified 12 Urban Opportunity Areas.

The local plan flexibly supports the development of new industrial and business uses within the Borough, applying a slightly more restrictive approach within the countryside.

The local plan defines a hierarchy of designated centres with Great Yarmouth as the main town centre, Gorleston-on-Sea as a town centre, Beacon Park and Caister with district centres, and a series of local centres across the Borough.

Borough Council of King's Lynn & West Norfolk Corporate Strategy 2023-2027

The key themes of this strategy are:

- Promote growth and prosperity to benefit West Norfolk - to create job opportunities, support economic growth, develop skills needed locally, encourage housing development and infrastructure that meets

local need, and promote West Norfolk as a destination.

- Protect our environment - to create a cleaner, greener, and better protected West Norfolk by considering environmental issues in all we do and by encouraging residents and businesses to do the same.
- Efficient and effective delivery of our services - to provide cost-effective, efficient services that meet the needs of our local communities, promote good governance, and provide sustainable financial planning and appropriate staffing.
- Support our communities - to support the health and wellbeing of our communities, help prevent homelessness, assist people with access to benefits advice and ensure there is equal access to opportunities.

Example activities from this strategy are:

- Support a year-round programme of events, festivals and activities for residents and visitors.
- Maximize opportunities to transform and regenerate our high streets and heritage assets.
- Encourage active travel by reducing barriers to walking and cycling.
- Tackle social and health inequalities.

Borough Council of King's Lynn & West Norfolk - Economic Vision and Strategy

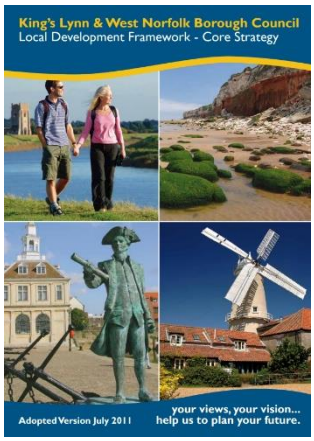
The Economic Strategy is currently in draft for consultation. This will be available on the Borough Council of King's Lynn and West Norfolk website. Visit this link for more information: West Norfolk economic strategy

With the Economic Vision and Strategy being developed alongside the Norfolk Economic Strategy (with shared evidence base and stakeholder engagement), there is clear alignment shown within King's Lynn and West Norfolk's five strategic pillars. The pillars are 'thriving towns', 'access to education and good work', 'productive jobs and businesses', 'managed natural resources' and 'healthy and inclusive communities'.

The document also sets out the key challenges facing the economy of King's Lynn and West Norfolk. These include health inequalities, insufficient housing, transport and connectivity constraints and business base pressures. These will be addressed through the five pillars.

Reference is also made to key sectors – Agri-Food, Engineering, Waste & Water and the Visitor Economy – and their importance to economic growth.

Borough Council of King's Lynn & West Norfolk Local Plan: Local Development Framework - Core Strategy



People want to be part of the success story that is West Norfolk, drawn here to live, work, invest and visit. West Norfolk enjoys an unparallelled balance between quality of life and quality of opportunity with people drawn to the area to take advantage of this.

The example core Strategy objectives are:

- Economy - People want to be part of the success story that is West Norfolk, drawn here to live, work, invest and visit. West Norfolk enjoys an unparallelled balance between quality of life and quality of opportunity with people drawn to the area to take advantage of this.
- Society - All communities are strong, cohesive and safe.
- Environment - West Norfolk is meeting the challenges of climate change and reducing or mitigating carbon emissions.
- Towns and Places – King's Lynn, Downham Market, Hunstanton, Rural areas, coast.

Breckland Corporate Plan: Breckland Corporate Plan 2021 - 2025

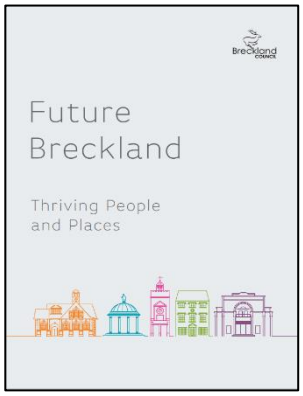
The priorities of this plan are:

- Inspiring Communities - We want to build on the many strengths of our local communities so that people can lead happy, healthy, fulfilling lives in Breckland and we support people through targeted services that make a difference.
- Thriving Places - We continue to drive investment to unlock the significant potential and opportunities in our district.
- Breckland 2035 - We will be a role model for sustainability, take action, and enable others to make informed choices so that together we can all make an impact and contribute to greener lifestyles.
- Working Smarter - We are a dynamic, innovative organisation which embraces change and new ways of working.

Example activities from this plan are:

- Supporting vulnerable residents through our £1 million Inspiring Communities programme.
- Developing a focus on creating an ‘Inclusive Economy’.
- Ensuring the success and effectiveness of the Future Breckland project.

Breckland - Future Breckland

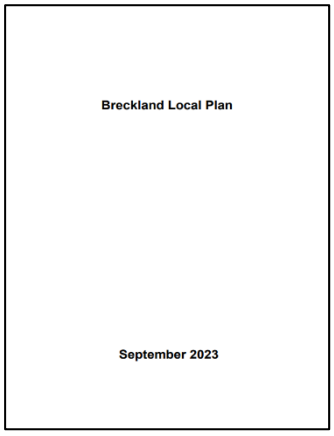


The ethos behind Future Breckland was to create a shared vision that everyone with a stake in Breckland's society and economy could align to.

The objectives of this plan are:

- Regenerating and placemaking - Regenerating Breckland's town centres to help them realise their potential, adapt to changing conditions, and attract people and businesses.
- Building on our heritage and culture - Building on Breckland's rich heritage and culture, while enhancing tourism opportunities and bringing our local communities together.
- Growing our business and enterprise base - Encouraging new businesses, expansions and relocations by improving the availability of business services and premises.
- Investing in housing and infrastructure - Targeted investment in housing, public transport and active travel to improve quality of life.
- Improving sustainability and wellbeing - Delivering our net zero commitment while supporting our residents to maintain active lifestyles.
- Encouraging educational attainment - Supporting our residents to train and pursue further and continual education to increase employment opportunities and meet ongoing employment needs.

Breckland District Council Local Plan



The Local Plan sets out the need for homes across the district and allocates land accordingly. In total, 16,525 homes have been allocated across the plan period (2021-2046).

The strategic objectives are:

- Development in the right place
- Meet housing need
- A strong economy
- A rich environment
- Thriving communities

This plan identifies Attleborough, Dereham, and Thetford as Breckland's strategic growth locations, both business and housing, with significant urban extensions already committed in Attleborough and Thetford. Whilst also considering the rurality of the district and allocating sufficient development outside of the market towns.

North Norfolk District Council: Our Corporate Plan 2023-2027

The main ambitions of this plan are:

- Our greener future - We will continue our work to create a cleaner, green and zero-carbon future for North Norfolk.
- Developing our communities - We will develop our work to support confident, engaged, resilient and inclusive communities.
- Meeting our housing need - We will seek to meet the challenges of local housing need.
- Investing in our local economy & infrastructure - We will create an environment where businesses thrive and prosper, supporting jobs and economic opportunity for all.
- A strong, responsible & accountable council.

Example ambitions for this plan are:

- Supporting our communities to become more resilient, self-reliant, inclusive and embrace their diversity.
- Working with our Market and Resort Towns to reinforce their roles as local service centres, centres of employment, financial services and business activity, served by public transport.

North Norfolk District Council: Economic Strategy and Action Plan 2023-2027

The main themes of this plan are:

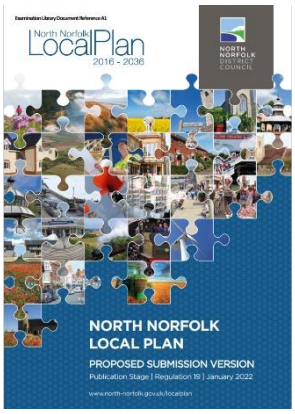
- Inflationary pressures – cost of living for residents, operational costs of running businesses.
- Climate change
- Infrastructure investment – needed to unlock key growth areas and to address critical ‘not spot’ broadband and mobile signal issues.
- Market towns – and the changing way in which people shop and use our towns, particularly given the growth in out-of-town retail areas and online shopping.
- Lack of ‘grow on’ space for businesses - commercial premises stock of many industrial sites are aging and predominantly saturated.

Example activities from this plan include:

- Establish and support a North Norfolk Skills Assembly to help embed a joined up and collaborative approach to supporting skills and recruitment and overcome critical issues.

- Market Town Network Improvement Strategies. Norfolk County Council have previously produced reports for North Walsham, Fakenham and Hoveton and Wroxham. We will encourage and support reports in the other towns.

North Norfolk District Council: Emerging Local Plan 2022 - 2036



The plan outlines the long-term vision and strategy for the development and evolution of towns, villages, and the countryside in North Norfolk up to 2036.

The towns of North Walsham, Fakenham and Cromer are the focus for a significant proportion of the required development.

The objectives of this plan are:

1. Delivering Climate Resilient Sustainable Development
2. Protecting Character
3. Meeting accommodation needs
4. Enabling Economic Growth
5. Delivering Healthy Communities

Norwich City Council Corporate Plan: We Are Norwich (2024 – 2029)

The main ambitions of this plan are:

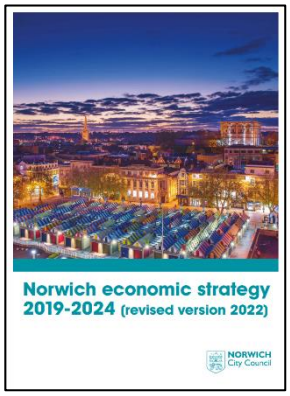
- An open and modern council
- A prosperous Norwich
- A fairer Norwich
- A climate responsive Norwich
- A future-proof Norwich

Examples of these ambitions include:

- A net-zero council by 2030 - Our council services have a reduced carbon footprint, and environmentally conscious suppliers are supported by increased council investment and spending. Our businesses drive a low emission agenda, our recycle rates are increased across the city and our air quality is improved.
- Vibrant parks and open spaces for all - Our parks and green spaces have increased usage across all communities, with improved recreation, sport and leisure opportunities, evidenced by a higher take up in sport and physical activity, contributing to better mental and physical wellbeing.
- Better incomes for people in Norwich - Incomes have risen and people have better standards of living. The Real Living Wage has become the norm not the exception, more people receive the benefits they are entitled to, and there is a

greater number of high-quality unionised jobs. The economy is more inclusive and there is support for people into work, particularly in our most disadvantaged communities.

Norwich City Council Economic Strategy 2019-2024

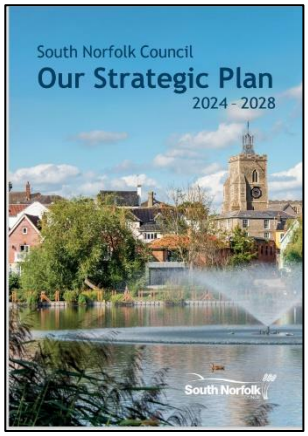


The main themes of this strategy are:

- Diverse economy -The diversity of Norwich's economy is one of its greatest strengths.
- Low productivity - Poorly paid and insecure employment in relatively low-skilled jobs in sectors which are likely to see significant contraction as technology replaces many roles.
- Shifts in the labour market - Artificial Intelligence (AI) and other technologies replace many traditional roles and new requirements, particularly those driven by expected technological advancement, will emerge.
- School attainment - Norwich's future labour market should provide many opportunities for our young people.
- Vibrant city centre - Norwich, with its historic, cultural and visitor offer should be able to prosper in an environment where technology has profoundly impacted high streets, though this will require further investment and active management to find the balance between employment, housing, retail and leisure.
- Innovation - Adopting new approaches which form the best way to build on the city's strengths, harness new ways to create growth, and inform new ways of meeting social challenges.
- Climate change - Businesses can benefit from the low-carbon economy in two ways: by diversifying into new products, and by becoming more efficient in their current processes.
- Brexit - Delivering sustainable economic growth relies upon new financial models and effective working across the public sector, and between the public and private sectors.

Please note that a new five-year Norwich Economic Strategy is to be published in January 2025.

South Norfolk District Council: Our Strategic Plan 2024-2028



The vision for this plan includes:

- Enhancing our environment
- Growing a prosperous economy
- Enriching our communities
- Moving with the times

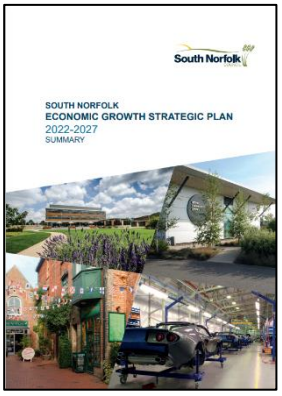
Example activities from this plan include:

- Make the most of our own community asset land to increase biodiversity and ensure they contribute to an attractive natural environment.
- Make it easier for rural businesses by helping enterprises that are in more secluded areas.
- Focus and expand upon our early intervention solutions, one family at a time.
- Collaborate with neighbouring councils, regional organisations, and private sector partners to leverage resources, share best practices, and collectively address challenges.

South Norfolk District Council Economic Strategy

<u>South Norfolk Economic Growth Strategic Plan - 2022 - 2027</u>

The priorities of this plan are:



1. Growth and Investment Supporting businesses and key clusters and securing capital funding.
2. Quality Locations and Infrastructure Promote quality and affordable housing, building community resilience, developing a sustainable and accessible transport network.
3. Skills and Lifelong learning Addressing the skills shortage, creating high-calibre employment, and tackling long term unemployment while maintaining equality of opportunity and inclusive growth.
4. Innovation and Enterprise Championing the development of new technologies and networks - transition to a Net-Zero carbon economy.

Example activities from this plan include:

- Increased space available for start-ups and increased retention of expanding businesses in the area - Hethel Innovation Centre, Food Enterprise Zone and Norwich Research Park.

- Work with partners to promote the Norwich to Cambridge Tech Corridor and associated cluster formation and growth.

Broadland District Council - Council Plan 2020-2028

As a modern, caring Council, we will strive to achieve our vision by focusing on our four key priorities:

- Empowering individuals and communities
- Cleaner, greener Broadland
- Providing the right homes in the right places
- Sustainable resilient local economy

Example activities from this plan include:

- Explore the delivery of Community Hubs across the district.
- Develop “social value” procurement frameworks, associated training, on reducing carbon emissions and embedded carbon, improved employment practices, the protection and enhancement of natural environments, investment in green skills.
- Measure the success of our economy not only by monetary metrics but through co-benefits such as community wellbeing, public health, skill development, and social inclusion.
- Deliver a retrofit programme, focusing on least energy efficient homes and grow the circular economy and local skills around retrofit.

Broadland District Council Economic Strategic Plan 2022-2027

The priorities of this plan are:

1. Growth and Investment - Supporting businesses and key clusters and securing capital funding.
2. Quality Locations and Infrastructure - Promote quality and affordable housing, building community resilience, developing a sustainable and accessible transport network.
3. Skills and Lifelong learning - Addressing the skills shortage, creating high-calibre employment, and tackling long term unemployment while maintaining equality of opportunity and inclusive growth.
4. Innovation and Enterprise - Championing the development of new technologies and networks - transition to a Net-Zero carbon economy.

Example activities from this plan include:

- Develop business cases for commercial investment opportunities in key clusters with regional partners ahead of funding streams becoming available.
- Engage with businesses to understand current skills gaps and evolve the package of direct delivery at Carrowbreck House and online to address local needs.

Greater Norwich and the Greater Norwich Growth Board

Broadland District Council, Norwich City Council, South Norfolk District Council

Figure 103: Map of Greater Norwich Area

Greater Norwich consists of the combined administrative areas of Broadland District Council, Norwich City Council and South Norfolk Councils. Together they form one of the fastest growing parts of the country, delivering infrastructure under a unique voluntary partnership arrangement which is recognised nationally as being an exemplar for best practice.

Greater Norwich is overseen by two separate voluntary partnership boards:

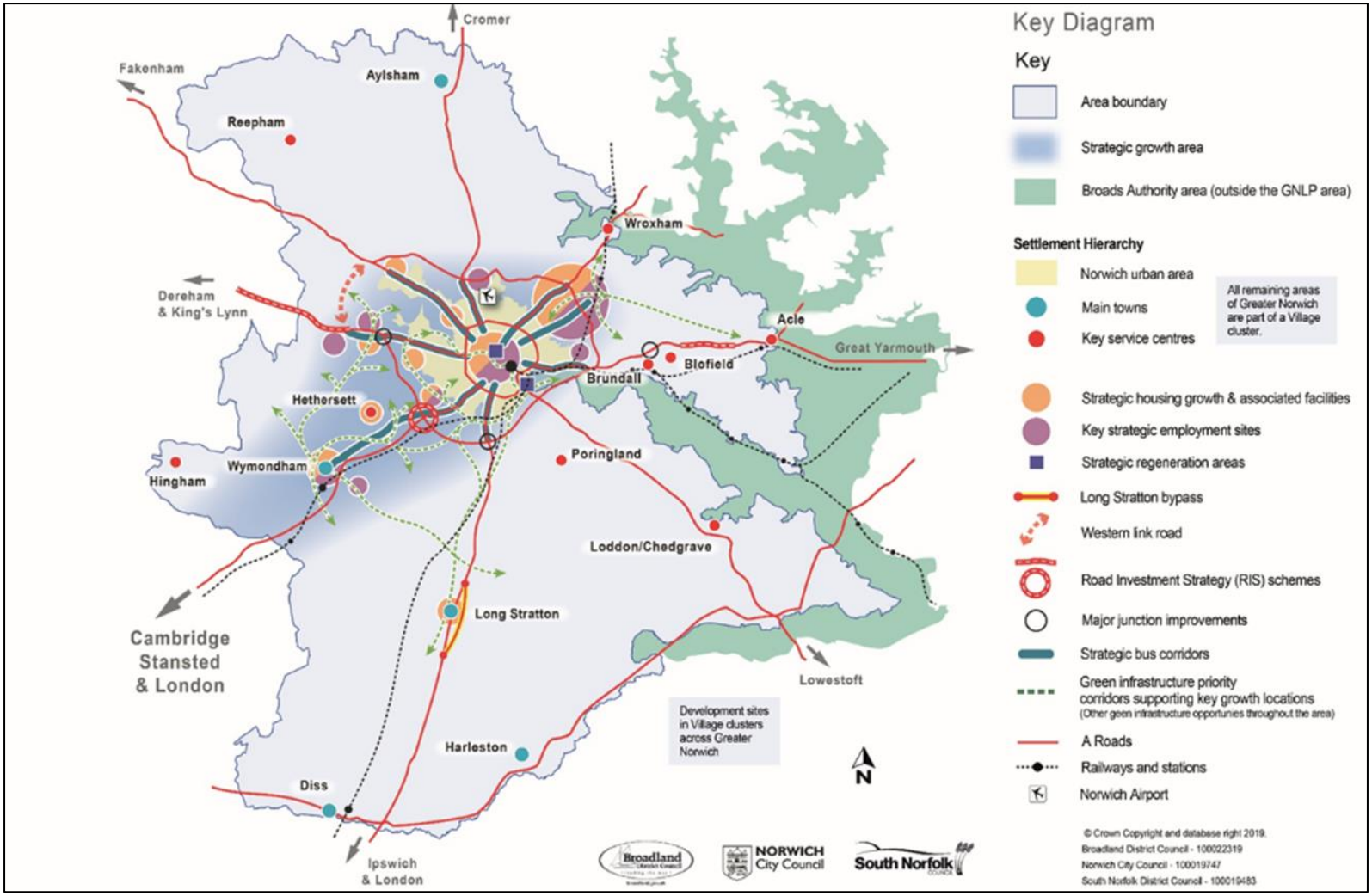
- The **Greater Norwich Development Partnership (GNDP)** directs the development and delivery of the Greater Norwich Local Plan (GNLP).
- The **Greater Norwich Growth Board (GNGB)** monitors and drives forward the delivery of infrastructure which is required to support the growth that is agreed in the Greater Norwich Local Plan.

Greater Norwich Local Plan

The Greater Norwich Local Plan sets out the vision for future development in Greater Norwich until 2038. It was created collaboratively by Broadland District Council, Norwich City Council, South Norfolk Council and Norfolk County Council, and was adopted by all three councils in March 2024. The GNLP includes strategic planning policies and allocates individual sites for development. It aims to ensure that new homes and jobs are delivered whilst the environment is protected and enhanced.

Approximately 70% of the Greater Norwich housing growth and the majority of commercial growth to 2038 is proposed to be within the Strategic Growth Area (SGA) shown in figure 97 on the next page.

Figure 104: Map of Strategic Growth Area



Source: [Greater Norwich Infrastructure Plan 2024]

Cambridge Norwich Tech Corridor

Perkins & Will set out a visionary report which highlights the tech corridor has a vibrant economy of £27.3bn where life science and med-tech clusters are working at the intersection of food and human health, creating ground breaking therapies and medical devices. The corridor has seen a 40% growth in scientific and R&D employment since 2010. Home to a thriving agri-food and agri-tech sector, adding £1.5bn to the UK economy.

Norfolk's Policies

Better Together, For Norfolk (2021-2025)

The Together for Norfolk Plan (2019) has been refreshed in 2021 to create the Better Together for Norfolk Strategy.

A survey of Norfolk residents post-Covid-19 identified the main priorities for Norfolk residents as local businesses, unemployment, social care and health, and investment in community infrastructure and hubs.

The document sets out five strategic priorities:

1. A vibrant and sustainable economy
2. Better opportunities for children and young people
3. Healthy, fulfilling and independent lives
4. Strong, engaged and inclusive communities
5. A greener, more resilient future

This is to be achieved via three themes:

1. Growing Economy
2. Thriving People
3. Strong Communities

Example activities supported include:

- Develop Norfolk as a centre for innovation in life sciences and supporting new technologies with a strong inward investment proposition that promotes our county as a place to visit.
- Levelling-up economy by promoting good jobs and a higher skilled and healthier workforce.
- Working with partners to increase qualifications and build the skills that meet the needs of green, high-value and transformational businesses.

Norfolk County Council Delivery Plan (2024 -25)

This plan details the most significant activities happening across the Council which support the delivery of the Better Together, for Norfolk Strategy.

The main challenges and opportunities that were identified were:

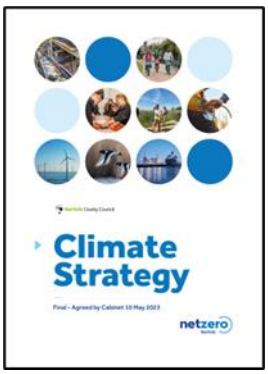
- Significant challenges to local government finances with higher costs, increasing demand for services and restricted government funding
- Devolution
- Climate change
- Addressing skills gap as the world of work will continues to change, with decreasing jobs in invoicing, clerical, and administrative work and new opportunities emerge. within technology, energy, and green sectors
- Growing demand for critical services
- A high percentage of people living within rural areas which increases the cost of service delivery
- Challenges in our local health system

The main ambitions are outlined above in Better Together, For Norfolk (2021-25).

Example activities supported include:

- Integrate LEP functions
- Maximise business, employment and skills support
- Continue to improve digital connectivity to maximise digital inclusion
- Deliver the next phase of the Norwich Western Link and continue to lobby to dual the A47
- Promote Norfolk as a key destination for inward investment and tourism.
- Continue to implement Apprenticeships strategy
- Continue to deliver specialist housing programmes
- Continue to roll out improvements to bus services with a focus on green transport

Climate Strategy 2023



This document sets out a strategic framework for the way Norfolk County Council is tackling climate change locally and building resilience to its effects.

The focus areas for this strategy are:

- NCC Estate
- Indirect Emissions
- County-wide Emissions
- Promoting green economy
- Adapting to climate change
- Space for nature to grow and recover
- Engage and collaborate

Example activities supported include:

- Work with local networks such as the LEP to support SMEs (small and medium enterprises) on their journey to net zero.
- Develop an energy strategy for Norfolk County Council aligned with our net zero agenda.
- Work with the Tyndall Centre for Climate Change Research at the University of East Anglia to understand better the risks of climate change impacts on Norfolk and potential adaptation responses.
- Ensure new infrastructure is designed against appropriate assumptions on the future impacts of climate change.
- Produce a Local Nature Recovery Strategy for Norfolk that prioritises areas for action focusing on species, habitats, landscapes and land use of importance to Norfolk with potential for carbon capture.
- NCC will work in partnership with the Retrofit Academy to establish the feasibility of developing a dedicated retrofit and low carbon building training facility in the County.

Norfolk's Rural Economic Strategy (2021 Draft)

This latest report refresh for 2021-2024 focuses on the impacts of the COVID-19 pandemic and how the Strategy can respond to the major changes to rural community life.

Over half the people living in the county and claiming universal credit live in rural areas; business start-up rates in rural areas are well below the national average; the 2020 digital transition has been huge but rural Norfolk still needs to overcome constraints due to a lack of connectivity and skills; rural communities need better access to health and wellbeing services; Brexit is causing challenges for many rural businesses (particularly health and social care) in recruiting and retaining workers; the impact of climate change could have significant impact for agricultural businesses.

Our vision for Rural Norfolk is inclusive, sustainable communities with a dynamic, connected economy and healthy natural environment, able to meet the needs of all rural residents and visitors'.

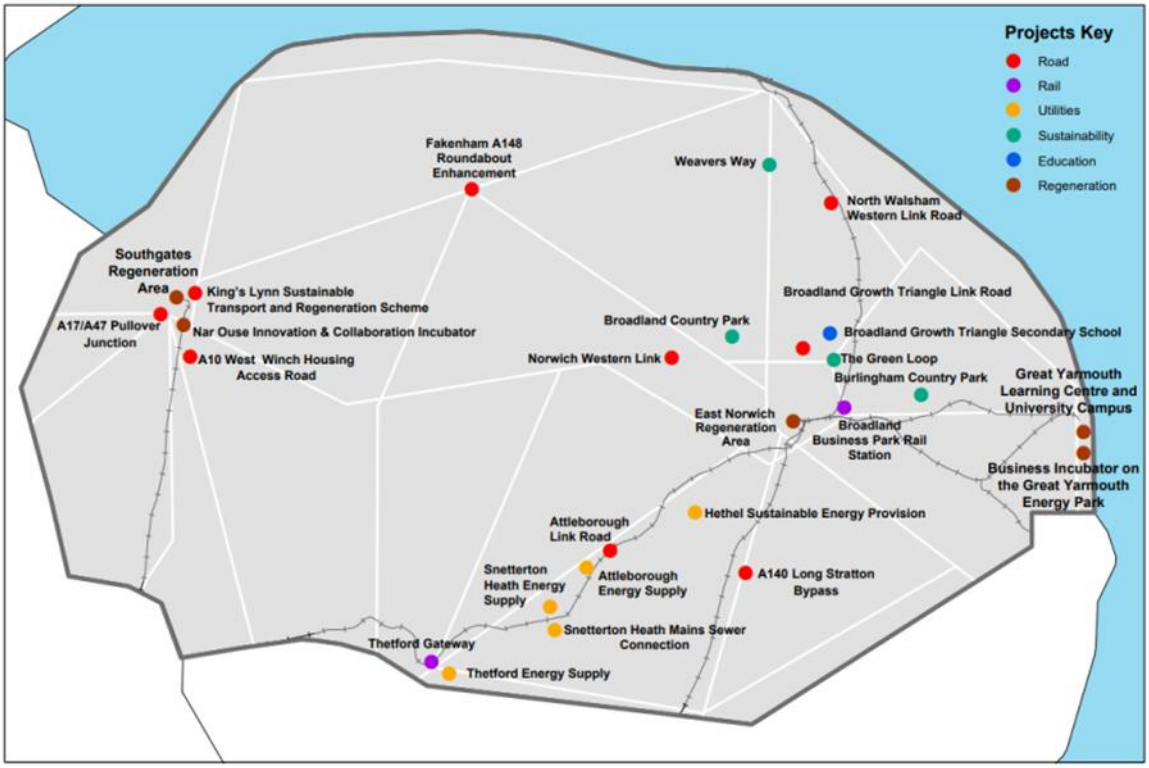
Example activities supported include:

- Provision of business diversification grants (e.g., LEADER or DRIVE programme).
- Diversification of publicly-owned assets (e.g., County Farms Portfolio) to support rural diversification.
- Champion the role of the Environmental Land Management Scheme to support countryside access and active forms of countryside recreation.

Norfolk Strategic Infrastructure Delivery Plan (2022)

The Norfolk strategic infrastructure delivery plan (NSIDP) pulls together information on the key infrastructure needed to deliver economic growth in Norfolk.

Figure 105: Map of key infrastructure projects



NCC Local Transport Plan 4 Strategy (2021 – 2036)

The Local Transport Plan sets out Norfolk County Council's plans, policies and programmes on transport and transport infrastructure. The plan details how we will deliver a transport network in Norfolk through identifying the projects and programmes important to us, and in their design and direct delivery.

The main challenges identified were:

- Significant numbers of people have to travel relatively long distances to access everyday facilities, often with the added challenge of variable quality public transport.
- Norfolk's transport network is largely rural, lengthening journey times.
- Many settlements still retain historic street layouts, leading to congestion on some corridors and a lack of space to provide facilities for all different types of user of the network.

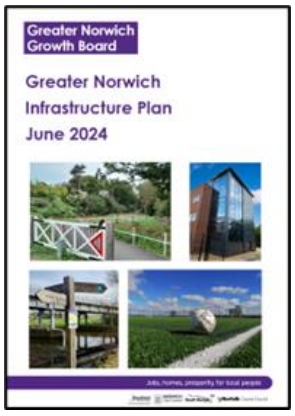
The main ambitions are:

- Embracing the Future
- Delivering a Sustainable Norfolk
- Enhancing Connectivity
- Enhancing Norfolk's Quality of Life
- Increasing Accessibility
- Improving Transport Safety
- A Well Managed and Maintained Transport Network

Example activities supported include:

- Ensure that new developments are located in suitable areas with access to services and leisure facilities via sustainable and active transport.
- Ensure new developments are well-connected to bus networks.
- Make the case for investment to the rail network and trunk roads.

Greater Norwich Infrastructure Plan (2024)

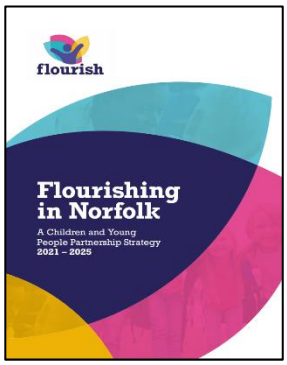


A high-level summary of what infrastructure is needed to support growth in Greater Norwich. It is prepared to help coordinate and manage the delivery of strategic infrastructure projects as well as improve quality of life for residents and enhance the natural environment.

The Greater Norwich Infrastructure Plan includes:

- Information about how the partners are working to achieve decarbonization and sustainability.
- A summary of the Greater Norwich Strategic Growth Area, the areas where growth is planned to take place.
- An outline of the range of funding streams which have been used to deliver infrastructure in Greater Norwich.
- An explanation of how Neighbourhood CIL is administered and spent in Greater Norwich with a supporting list of projects which have been identified in Neighbourhood Plans.
- Outlines the infrastructure that is required across the four thematic groups which are eligible to receive Strategic CIL funding from the GNGB; Green Infrastructure, Transport, Community Facilities and Education.
- Outlines the additional infrastructure requirements across a range of other categories.
- Contains appendices which provide a list of projects from the four eligible infrastructure groups that are currently programmed for delivery, separated from those that remain to be purely aspirational.

Flourishing in Norfolk Strategy



A Children and Young People Partnership Strategy 2021 – 2025.

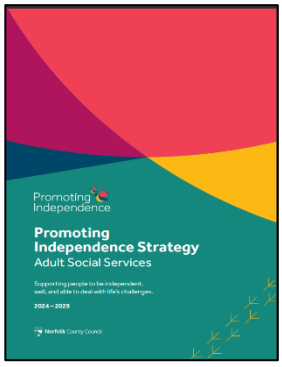
Produced with children, young people and families, FLOURISH is our shared ambition for Norfolk's children and young people.

The guiding principles of the strategy are:

- Child and young person focused.
- Positively framed – based on aspirations rather than just needs.
- Places importance on how children, young people and families feel about their lives.
- Inclusive of all children and young people in Norfolk.
- Recognises our shared responsibility for children, young people and families.
- Co-produced with young people.

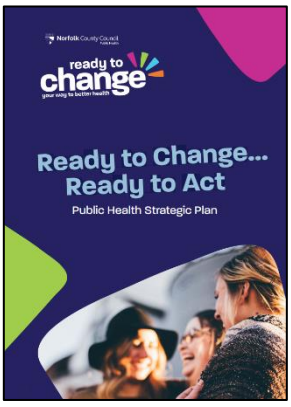
- Represents the interests and focus of all Children and Young People Strategic Alliance members.

Promoting Independence Strategy 2024-2029



We have an important vision for Adult Social Services in Norfolk: we want to support people to be independent, well, and able to deal with life's challenges. To achieve our vision, this strategy – Promoting Independence – is shaped by the Care Act, which aims to prevent, reduce and delay the demand for social care. This means we don't just provide the statutory minimum for our residents; we also continuously look for ways to support people before they face a crisis. Our strategy outlines our choices of how we will do that into the future, based on what you have told us is important. And through those choices, this strategy will also help us manage the demand for our services, our finances, and plan for our long-term future.

Ready to Change... Ready to Act: Norfolk Public Health Strategic Plan 2023



The mission of this strategic plan is to improve the health and wellbeing of the people of Norfolk and reduce health inequalities. Informed by best practice and evidence, we will lead the system in Norfolk to develop and focus a prevention approach to improve and sustain good health and wellbeing.

The main priorities are:

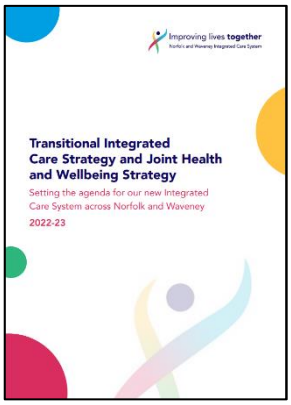
- Adults and Older People
- Prevention, Partnerships and Places
- Children and Young People

Example activities include:

- Support partners with their plans for addressing health inequalities by mapping existing health inequalities work across Norfolk, advise on gaps and duplication and develop a cohesive action plan for ourselves and partners.
- Ensure services are tailored to older people as appropriate and includes identifying and addressing frailty, dementia and social isolation.

Transitional Integrated Care Strategy and Joint Health and Wellbeing Strategy (2022-23)

As an Integrated Care System, we have developed an overarching mission to help the people of Norfolk and Waveney to live longer, healthier, and happier lives.



The main goals for this strategy are:

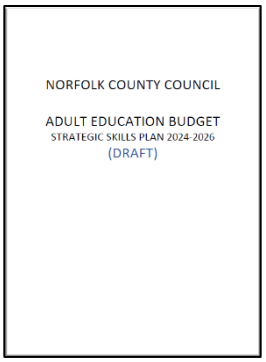
- To make sure that people can live as healthy a life as possible.
- To make sure that you only tell your story once.
- To make Norfolk and Waveney the best place to work in health and care.

Example activities include:

- To work as a single sustainable system in the delivery of people centred care, across a complex organisational and service delivery landscape.
- Embed prevention and early help across all system and organisational strategies, plans and policies and shift focus to community provision.
- Consult and engage with residents, including those from seldom heard and excluded communities, to design and input into our services. This should include a variety of engagement methods and technologies.

Adult education budget strategic skills plan (2024-26)

Devolution of the Adult Education Budget (AEB) would enable us to deliver education provision which is aligned to meet the needs of Norfolk people, places, businesses and employers. This strategy sets out how it would do so.



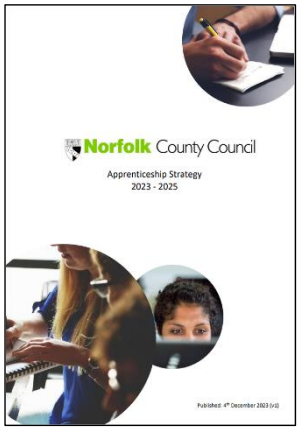
The main challenges identified were:

- Skills miss-matches with skills shortages in some sectors, but also within geographic and demographic communities where individuals struggle to access opportunities.
- Wage and occupational inequality and lack of progression in work.
- Growing polarisation between higher and lower skilled occupations.
- Geographical inequalities, including health and wellbeing, and profound in some areas of skills deprivation.

The main ambitions of this plan are:

- Establish a strategic partnership with providers and stakeholders, able to collaborate with a specific place-based focus on Norfolk's skills needs.
- Develop and commission delivery of a local offer with the agility to respond to employer demand.
- Focus provision and learner support to areas of high skills deprivation, supporting the social mobility of residents in these areas.
- Focus skills provision on key Norfolk industry sectors, supporting growth and inward investment opportunity.
- Establish joint working protocols across post-16 skills activity, bringing clarity on devolved and non-devolved funding and ensuring complementary provision.

Apprenticeship Strategy (2023–25)



This strategy outlines how NCC intends to support the delivery of apprenticeships locally; both as an employer and as a strategic leader. Strategy compiled across 3 directorates – Children's Services, Human Resources and Growth & Investment.

The main challenges identified were:

- A significant decline in the number of apprenticeships in Norfolk and England since 2016/17.
- Stagnant apprenticeship funding.
- Continual policy developments and annual developments to (complex) funding rules.

The main ambitions for this strategy are:

- Apprenticeship as a high-quality opportunity that delivers the skills, knowledge and behaviours that employers are looking for.
- Promoting sustainable green skills required to support our emerging Net Zero priorities.
- A broad range of apprenticeships at all levels, from intermediate/advanced through to higher/degree level.
- Apprenticeships as a viable and aspirational pathway and route of progression for our young people and adults.

Example activities supported included:

- Increase opportunities to inspire, promote and champion apprenticeships; improving awareness and understanding of the benefits an apprenticeship; and celebrating successes.

- Undertake primary research to better understand the barriers to apprenticeships.
- Support an increase in the number of apprenticeship starts in Norfolk.

NCC Digital Strategy and Roadmap for the 2020s

This digital strategy and roadmap explains how NCC are going to build on past and current success, as the Connected Britain Digital Council of the Year 2020.

The main ambitions are:

- Focusing on inclusive growth and improved social mobility.
- Encouraging housing, infrastructure, jobs and business growth across the County.
- Developing our workforce to meet the needs of the sectors powering our local economy.
- Work to reduce our impact on the environment.
- This way we can help Norfolk have a growing economy, full of thriving people living in strong communities we are proud of.

Example activities supported include:

- Digital Strategy for Care
- Go Digital – free digital support to micro and SME businesses
- LoRaWAN – the largest free public sector deployment in the UK
- Schools Digital Skills Development

Digital Inclusion Strategy

The strategy's vision is that every Norfolk resident is provided with the appropriate digital access opportunities to meet their needs and enable them to be digitally included in all aspects of their lives.

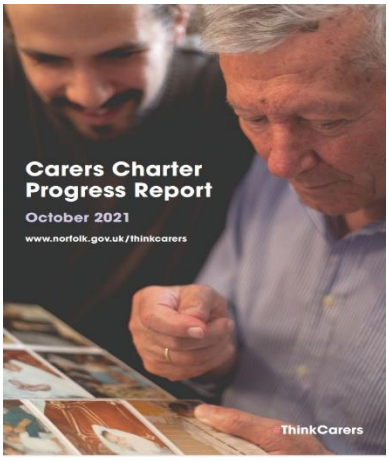
Aspirations for is strategy are:

- Working in partnership to target activity and make best use of resources.
- Enabling universal access to connectivity in the county.
- Supporting access to devices and equipment.
- Increasing digital skills and confidence in key cohorts.
- Developing the skills of our staff to understand how to support residents to access and use technology to improve their lives.

Example activities from this strategy are:

- Subsidised and free connectivity through the Norfolk Assistance Scheme to provide broadband and/or mobile connectivity to selected cohorts.
- Digital programmes of learning will include information about purchasing and understanding broadband packages.
- Ensure Norfolk residents, including children, can stay safe online and understand how to avoid scams, cyber abuse and exploitation.

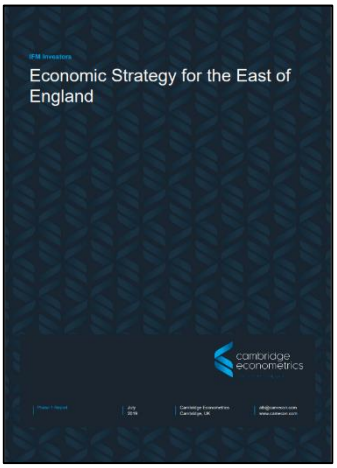
Norfolk Carers' Charter, October 2021



A document produced in collaboration between carers and councillors, the charter aims to ensure that not only do carers receive the support and understanding that they need but are also recognised as individuals in their own right. The charter centres on three areas – carers in work; young carers and young adult carers in education; and carers in the community. By focusing on these areas, the charter aspires for carers to be able to remain in employment if they wish, for young carers to experience the same formative opportunities and aspirations as their peers and for carers in the community to access services efficiently.

Additional Policies for Norfolk

Economic Strategy East of England (2020)



The Economic Strategy for the East of England was produced by Cambridge Econometrics in 2020 on behalf of IFM Investors. It has been endorsed by LEPs across the region.

The main challenges identified were:

- Growth prospects are limited by an inability to move daily commuters to and from employment hubs.
- There is patchy infrastructure provision in rural areas which means many places are not integrated with important economic markets.
- there are disadvantaged coastal communities that are unable to access opportunities in the local transport, logistics and clean energy sectors.
- Permitted Development Rights is impacting employment assets and sites.

- levels of graduate retention are low and there are few clear attractors for them.

The main ambitions for this strategy are:

- The region's expertise and assets leave it well-placed to tackle the Government's Ageing Society and Clean Energy Grand Challenges.
- New Anglia LEP are focusing on building excellence in STEM disciplines across their skills and education system.
- Research and Development spending in New Anglia is 1.14x the national average.
- There are circa 1,000 wind turbines off the coast of the East of England generating 3.5GW of energy - investment has been secured for another 1,000 turbines.
- 60% of offshore wind energy is generated in the East of England.
- There is 1.4m hectares of farmland in the East of England and 79% is arable.

Transport East Transport Strategy

Strategy which aims to overcome some of the transport challenges experienced, while also delivering a fit for purpose, high quality, inclusive and sustainable transport network that will be able to accommodate future growth in the area.

The main challenges identified were:

- The region covers a large area, with no major hub city.
- Many journeys made within the region are difficult to make other than by car. This results in high transport related emissions – 42% of all carbon emissions in the region. Affecting people's health and contributing to climate change.
- Poor connections are a particular challenge for many people living in our rural and coastal areas, making it difficult to access jobs, education and essential services.

The main ambitions for this strategy are:

- Decarbonisation to net-zero
- Connecting growing towns and cities
- Energising coastal and rural communities
- Unlocking international gateways

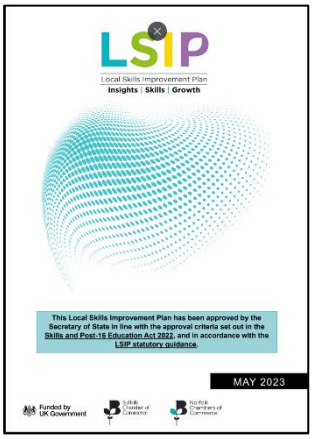
The priority corridors are:

- Midlands – King's Lynn – Norwich – Great Yarmouth
- London – Chelmsford – Colchester – Ipswich – Norwich & Suffolk Coast

- Norfolk and Suffolk to Cambridge – Midlands – South-West
- Connecting South Essex – London – Thurrock – Basildon – Southend
- Stansted – Braintree – Colchester – Harwich and Clacton
- King's Lynn – Cambridge – Harlow – London

Norfolk and Suffolk Local Skills Improvement Plan

Created by the Norfolk Chamber of Commerce and Suffolk Chamber of Commerce.



The Local Skills Improvement Plan priorities are:

- Industries - Agri-Food/Tech, Net-Zero.
- Cross Cutting Themes - Workforce Digital, Soft / Impact Skills

Example activities from this plan include:

- Priority Provision Mapping - Knowledge sharing improving accessibility to training
- Project 1st - Standardise training package across the region
- Common Language Response - Improve access to local provision
- Net Zero Private Sector Funding for Training - Unlocking funding streams

Norfolk and Suffolk Enterprise Zones

Delivering clean growth and innovation on our strategic investment sites Five year strategic plan (2021-26).

The Space to Innovate Enterprise Zone comprises 10 sites across Norfolk and Suffolk which are helping to create thousands of new jobs over 25 years. Collectively they provide over 130ha of space for new and expanding businesses looking to grow in Norfolk and Suffolk.

The Great Yarmouth & Lowestoft Enterprise Zone covers 6 sites. It is strategically placed to capture billions of pounds of investment in the region's energy sector and supply chain over the next two decades.

Regional Water Resources Plan for Eastern England

Created by Water Resources East (WRE).

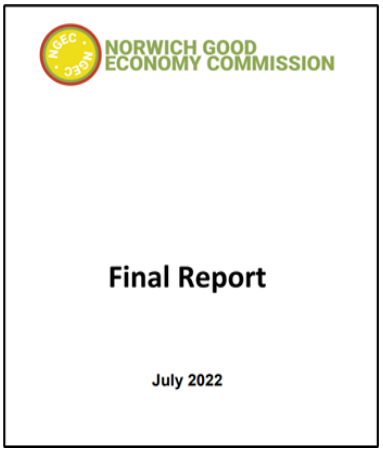
There is an urgent need for all the major water-using sectors in Eastern England to invest in managing the present and future risks of water scarcity.

Taking a long-term view in our regional plan at the draft and this final stage has allowed us to explore the actions and investments that would be needed between now and 2050 to meet the outcomes sought by the Environment Agency's most ambitious environmental enhancement scenario.

This 'Enhance' scenario entails:

- Supporting the achievement of 'Good Ecological Status' (or 'Good Ecological Potential') in all waterbodies, even where the Environment Agency has previously considered it 'uneconomic' to do so
- Providing extra protection for European Protected Sites and Sites of Special Scientific Interest (SSSIs)
- Delivering enhanced protection for chalk streams, wetlands and sensitive headwaters

Norwich Good Economy Commission | Get Talking Norwich



Based on the Good Economy Commission's analysis of the Norwich economy – undertaken through a series of workstreams, projects, networks and themes (including digital inclusion, skills, Good Jobs Project, Norwich Anchor Institutions Network and Diverse Voices) – the Commission recognised the need to pursue a more inclusive and sustainable economy. The commission pledged to attain this by addressing the following challenges and opportunities:

- Jobs to make people feel valued
- Buying from and supporting social enterprises
- Supporting social and environmental aims in recruitment and purchasing
- Consulting and engaging widely on decisions
- Digital inclusion

The Commissioners also agreed that updates and an annual report should be submitted to the Good Economy Commission which will monitor the progress made in the areas referred to above.

Norwich 2040 City Vision

Developed by Norwich City Council alongside key stakeholders as part of the Norwich Creative City Compact, the action plan commits the city council to a series of deliverables and actions (including those related to infrastructure, people and collaboration, investment and impact) that will support the formulation of the upcoming Cultural Strategy 2025 which will be aligned to the Norwich 2040 Vision. In addition, the action plan asserts Norwich's cultural strengths, the city council's key role within the cultural sector in Norwich and the broader benefit of culture to society.

Invest 2035: the UK's modern industrial strategy - Green Paper

Created by the UK Government.

This is a ten-year plan that aims to provide certainty and stability which will facilitate investment and create economic growth. Economic growth will be the overarching aim of the Industrial Strategy once it is published (following consultation) in spring 2025. The Green Paper specifies that plans for growth will be targeted in 'eight growth-driving sectors' (advanced manufacturing, clean energy, creative, defence, digital and technologies, financial services, life sciences, professional and business services) and that growth will support Net Zero, the UK's regions, economic security and high-quality jobs. The paper also notes how the government plans to address productivity challenges. A statutory and independent Industrial Council will be created to ensure the longevity and stability of the plans outlined in the strategy.

Norfolk's Sectors

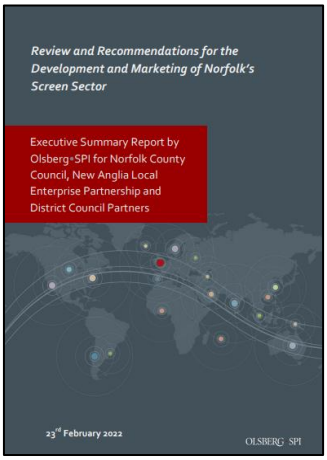
Norfolk FinTech Report 2024

WhiteCap Consulting produced this piece of work as part of a project funded by Norfolk County Council which reviews FinTech activity in the region. The report finds an emerging cluster of 24 FinTech firms. Potential to double in size over next few years - presenting a growth opportunity for Norfolk, with higher value jobs.

The proportion of female FinTech founders is the highest WhiteCap have observed in any regional ecosystem to date. There is a clear strength in InsurTech (the only region where it is the top subsector).

Norfolk Screen Sector - Review & Recommendations

Created by Olsberg SPI.



In 2021 Norfolk County Council commissioned a holistic research project into the Norfolk Screen Sector including Film, TV, animation, commercials and related sector activity. The research has created an evidence base of the value, size and shape of the screen sector in Norfolk and has recommendations for its growth.

Innovation Prospectus

The Connected Innovation Prospectus showcases the region's innovation ecosystem and sets out information across key innovation hubs, research locations and clusters in the region.

Local Action Plan for Norfolk and Suffolk

The Innovate UK Local Action Plan sets out the key actions and priorities for engagement with Innovate UK across Norfolk and Suffolk's innovation ecosystem.

Economic Impact of Tourism Visit Norfolk Report 2022

Created by Destination Research, this report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in 2022 and provides comparative data against the previously published data for 2021.

The total visitor spend value was £2,384,544,493, with an indirect / induced spend value of £981,483,000 leading to a total tourism value of £3,366,027,493 for Norfolk.

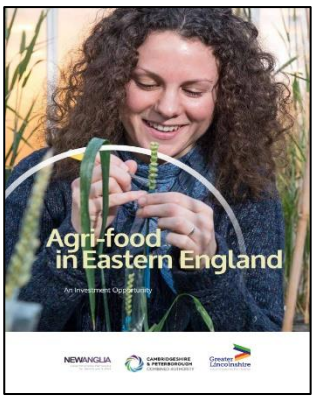
There are 50,898 FTE jobs and the total actual tourism related employment was 68,066 equating to 15.9% of all employment.

Culture Drives Impact

Created by the Norfolk & Suffolk Culture Board.

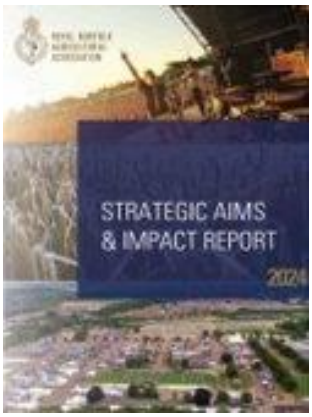
The cultural sector of Norfolk and Suffolk contributed £272 million in GVA in 2018 and grew by 16% since 2015. It supports job creation and delivers impact across the economy. Culture, then, drives growth. But it also helps shape a different kind of economy, based on wellbeing and sustainability.

Agri-Food in Eastern England Regional Narrative



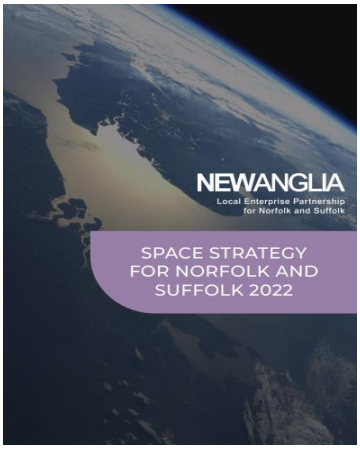
The regional narrative is a document that sets out the combined size, capabilities and ambitions for agri-food across Norfolk, Suffolk, Cambridgeshire and Lincolnshire. It covers research and innovation, digital technologies, the transition to net zero and diet and health. This was the basis of a combined bid to secure the £7.5m Innovate UK Agri-Tech and Food Tech Launchpad.

RNAA Annual Report



Alongside the delivery of the flagship Royal Norfolk Show – attracting 80,000 visitors and generating over £20 million to the Norfolk economy in 2024 – the Royal Norfolk Agricultural Association Strategic Aims and Impact Report prioritises the development of young people, local businesses and understanding of farming and how it relates to emerging economic clusters to facilitate the sustained improvement of the agricultural sector in Norfolk and beyond. The report also articulates plans to enhance the organisational sustainability of the Association and to promote cultural and leisure activities for the benefit of the community and visitors to the county.

Space Strategy for Norfolk & Suffolk



There are a range of exciting uses of space technologies that can – and should – be promoted far more extensively for the benefit and growth of the whole region.

We have strong relationships with the European Space Agency, UK Space Agency and Satellite Applications Catapult to help create new opportunities. This will help to identify applications of space and satellite technologies to boost jobs and support diverse sectors such as food and agriculture, offshore wind, coastal and marine science, transport and logistics. Meanwhile, our existing technology strengths and innovation assets such as Adastral Park, Norwich Research Park, Hethel Innovation, OrbisEnergy, CEFAS, UEA, University of Suffolk and others, present exciting opportunities for Norfolk and Suffolk to become a UK leader in the supply chain for the global space sector. Space presents a significant opportunity, and the global space market is projected to grow from £270 billion to £490 billion by 2030.