

## Place

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## Place SWOT

### Strengths

Generally high levels of resident satisfaction in their local area as a place to live.	p32
Crime levels are decreasing across the county.	p34
Increasing proportion of new homes built on 'brownfield' sites.	p8
Retail growth in most district town centres both provides an important source of employment and could help support the vitality of the broader market town business base.	p16

### Weaknesses

Relatively low levels of resident satisfaction in Fenland and Forest Heath.	p32
In the majority of wards across the sub-region, housing is less affordable than across the East of England as a whole and is particularly expensive in the south of the county. This is a significant constraint for people wishing to move into the area to work or set up a business.	p11
Transport infrastructure and transport congestion both on rural and urban roads costs millions in lost business productivity, reduces road safety and impacts on attractiveness as a business locality and the area's ability to attract investment.	p25

### Opportunities

Growth of micro-generation and increasing renewable energy capacity can open up new supply chain opportunities, increase energy security and has the potential to alleviate fuel poverty.	p28
Planned major broadband updates across the county will have a positive impact on future business productivity, the ability of residents to work from home and the attractiveness of the area as a location for inward investment.	p24
Land values are substantially lower in districts outside Cambridge and South Cambridgeshire – low development costs may attract new companies to locate in these districts.	p22
There is currently no shortage of business land committed for development in Cambridgeshire. By far the largest individual business commitment is the outline planning permission at Alconbury Airfield which covers the area of the newly designated Enterprise Zone.	p15

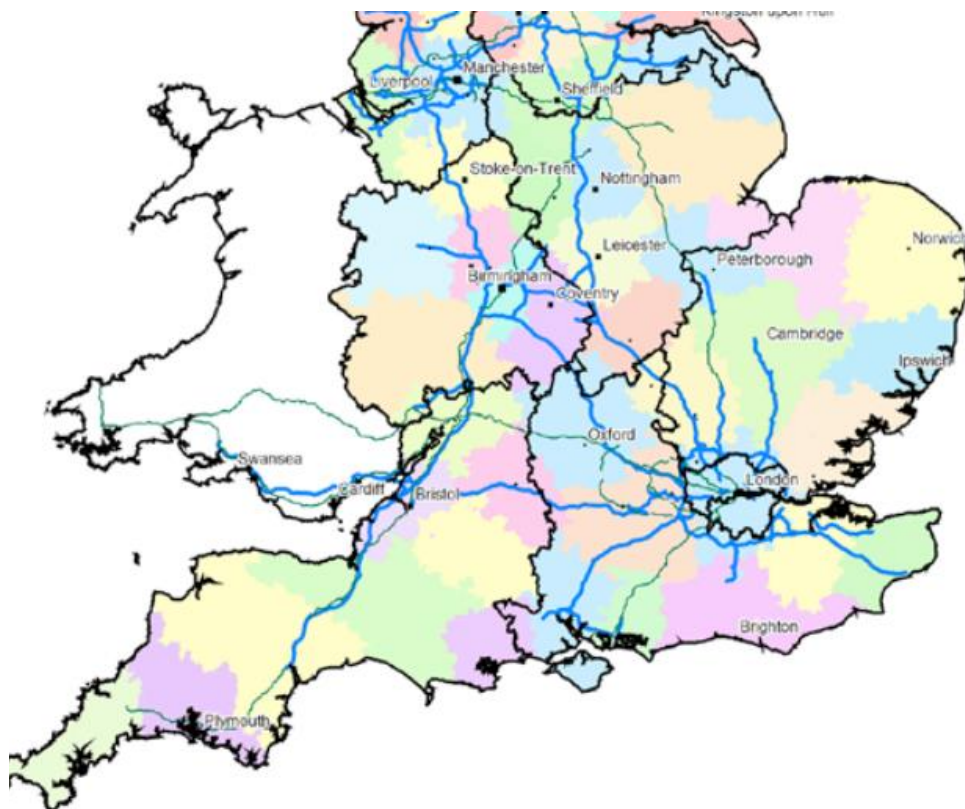
### Threats

Low proportion of detached and semi-detached housing in Cambridge City may impact negatively on inward investors wishing to move to the city with existing staff and families.	p6
Reduction in occupied office space in town centres, particularly Cambridge City will reduce the business diversity within market towns and in the case of Cambridge, could have implications for the future growth of knowledge-based industries.	p16
Food and farming and transport industries are particularly susceptible to the negative impacts of climate change.	p31
CO2 emissions per head are generally higher than average across most of Greater Cambridge which could cause numerous problems for residents and businesses.	P30
Loss in net business floorspace recorded for Cambridgeshire in 2011/12 for the first time in recent history.	P15
Diminishing level of affordable housing being built post-recession.	p8

## The Functional Economic Area

There is no universal approach to defining Functional Economic Market Areas. The pattern of economic flows can be different depending on which local markets are being considered. For example, hi-tech organisations will have a much more diverse and widespread supporting value chain (and employee catchment area) than organisations in lower value industries.

The Local Government Association completed some work in 2007 looking at functional economic areas across the UK by reviewing data on: labour market, supply and demand for the construction industry, supply and demand for personal services, supply and demand for transport and communications services, patterns of productivity, patterns of economic growth, traditional manufacturing clusters, clusters of hi-tech service industries and housing markets based on migration data. From this work they produced a 'preferred' sub-regional map which gave the best fit for the range of indicators used in the research. This shows a sub-region centred around Cambridge, which stretches further down the M11 but less far north than the existing recognised 'Greater Cambridge' area.



2001 Travel-to-Work Area (TTWA) data showed Cambridge as the third largest travel to work area in the East of England. Cambridge is one of two TTWAs in the region (the other being Norwich) which are net importers of workers (i.e. more jobs than resident workers).

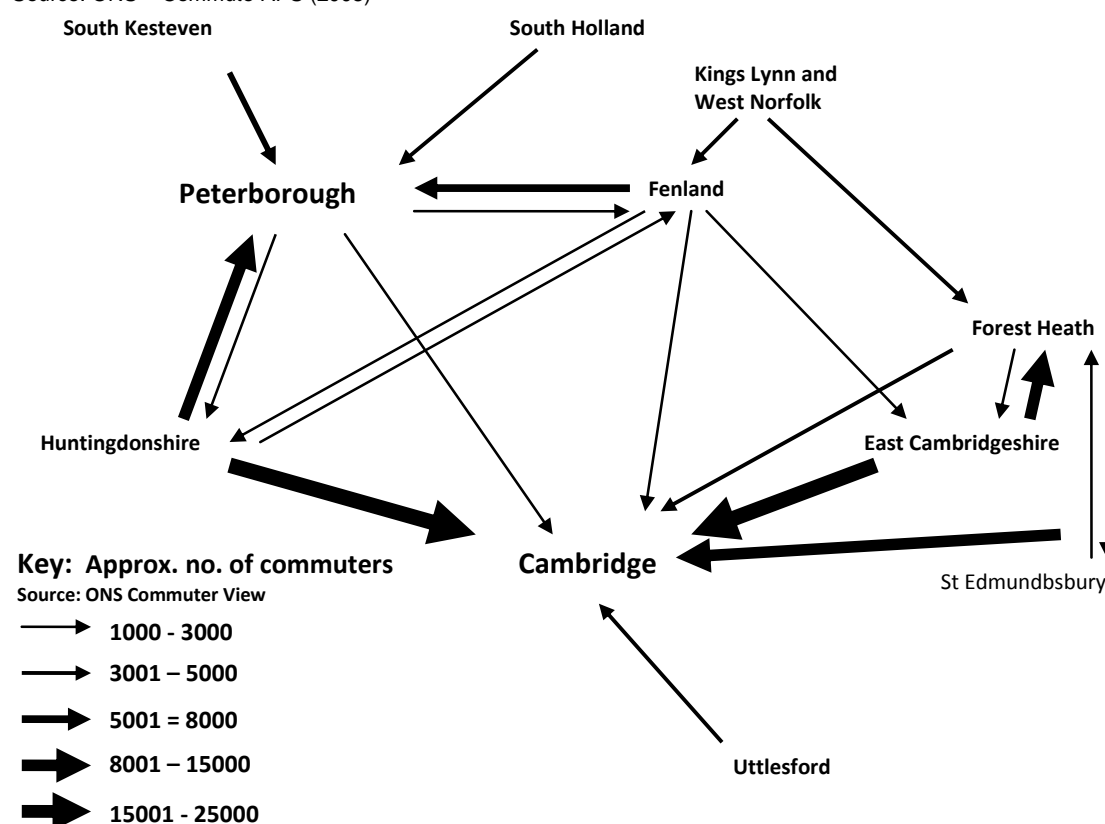
Cambridgeshire's labour market is relatively self-contained, with 80% of Cambridgeshire's residents working in the county, and 81% of Cambridgeshire's workers living in the county. These figures have not changed significantly since 2001; however there has been a slight increase in the number of residents commuting to London.

Commuting patterns into Cambridge stretch across the Cambridgeshire local authority boundary into the surrounding districts of St Edmundsbury, Forest Heath and Uttlesford.

These patterns overlap significantly with those of Peterborough, as demonstrated on the illustrative diagram below.

**Figure 1: Illustrative diagram showing approximate commuting numbers into Cambridge and Peterborough**

Source: ONS – Commute-APS (2008)



Around 30% of Cambridgeshire's out-commuters (6% of employed residents) travel to work in Peterborough, and around 15% to Forest Heath (3% of employed residents). Strong two-way commuting links exist between Peterborough, Fenland and Huntingdonshire (nearly a third of Fenland residents commute to Peterborough and Huntingdonshire to work), and between Forest Heath and East Cambridgeshire. In addition, Fenland draws approximately 12% of workers from King's Lynn and West Norfolk.

**Table 1: Proportion of residents/workers commuting in/out of the district to work**

Source: ONS – Commute-APS (2008)

Area	Proportion of residents who commute out of the district to work	Proportion of workers who commute in from other districts
Cambridge	18%	61%
East Cambridgeshire	49%	26%
Fenland	50%	35%
Huntingdonshire	40%	26%
South Cambridgeshire	63%	41%
Cambridge/South Cambridgeshire	15%	34%
Forest Heath	30%	42%
St Edmundsbury	32%	33%
North Hertfordshire	48%	43%
Uttlesford	53%	41%

## Housing

### Housing Stock and Tenure

#### Low proportion of detached and semi-detached housing in Cambridge City.

*Cambridge City has a low percentage of detached and semi-detached housing which may impact negatively on inward investors wishing to move to the city with some of their existing staff, many of whom might have families.*

The Cambridge housing sub-region includes the five Cambridgeshire districts, Forest Heath and St Edmundsbury.

**Table 2: Tenure by district**

Source: Census 2011

Area	Owner occupied	Shared ownership	Social rented	Private rented	Living rent free
Cambridge	47.5%	1.1%	23.6%	26.2%	1.6%
East Cambridgeshire	68.5%	1.5%	14.3%	13.2%	2.5%
Fenland	70.0%	0.5%	12.4%	15.6%	1.4%
Huntingdonshire	71.2%	0.7%	12.9%	14.1%	1.0%
South Cambridgeshire	70.3%	2.1%	14.3%	12.0%	1.4%
Forest Heath	55.9%	1.4%	14.7%	24.4%	3.6%
St Edmundsbury	66.9%	0.8%	16.0%	14.8%	1.5%
Housing Sub-Region	65.3%	1.2%	15.4%	16.5%	1.7%
East of England	67.6%	0.7%	15.7%	14.7%	1.3%

Owner occupation is the most common tenure across the area. In most of the sub-region, around 65% to 70% of households are owner occupied, but the proportion is smaller in Cambridge City and Forest Heath. These areas have large proportions of private tenants reflecting the generally younger population in Cambridge City and US Air Force personnel and the racing industry in Forest Heath. Cambridge City also has a large proportion of social tenants. Cambridge City and South Cambridgeshire are the only local authorities to own and manage housing stock. In all other districts, social housing stock has been transferred to housing associations.

**Table 3: Stock profile by district**

Source: Census 2011

Area	Detached	Semi-detached	Terraced	Flat/mainsonette	Temporary structure	Shared accommodation
Cambridge	10.5%	27.1%	30.1%	31.1%	0.2%	1.1%
East Cambridgeshire	42.5%	32.0%	17.6%	7.0%	0.9%	0.0%
Fenland	45.8%	29.2%	15.7%	8.4%	0.8%	0.1%
Huntingdonshire	40.4%	30.2%	18.9%	9.9%	0.6%	0.0%
South Cambridgeshire	41.6%	33.7%	17.6%	6.0%	1.0%	0.0%
Forest Heath	35.8%	29.6%	21.7%	12.1%	0.7%	0.1%
St Edmundsbury	34.8%	27.0%	26.8%	10.9%	0.5%	0.1%
Housing Sub-Region	36.0%	30.0%	21.1%	12.0%	0.7%	0.2%
East of England	29.6%	30.9%	22.8%	16.0%	0.6%	0.2%

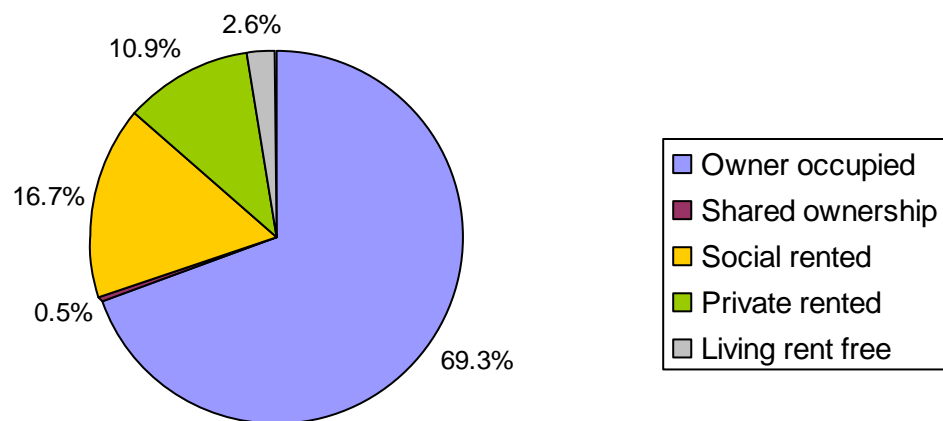
In the more rural districts, detached properties are the most common type of home available. Cambridge City has a very low proportion of detached properties (11% compared to 36% for the sub-region as a whole), and 30% of properties within the city are terraced houses. Generally there is a connection between building type and tenure with owner occupiers more likely to live in houses and tenants (both private and social) more likely to live in flats. Within the market, flats and smaller properties turnover at a higher rate than larger houses.

The low proportion of detached and semi-detached housing in Cambridge City may impact on the attractiveness of the city for inward investment. Anecdotal evidence exists of businesses wishing to relocate to the area along with some staff, yet their staff struggle to find houses of sufficient size close to the city centre where they wish to live.

Nationally, the private rented sector has grown from around 2.0 million households (10% of households) in 2001 to around 3.7 million households (17% of households) in 2011. Conversely, the percentage of households in owner occupation has fallen from 68% to 63%. Many of the reasons behind these trends, for example more restrictive mortgage lending and lower interest rates affecting households saving for a deposit, are macroeconomic, and are therefore reflected in the trend within the housing sub-region.

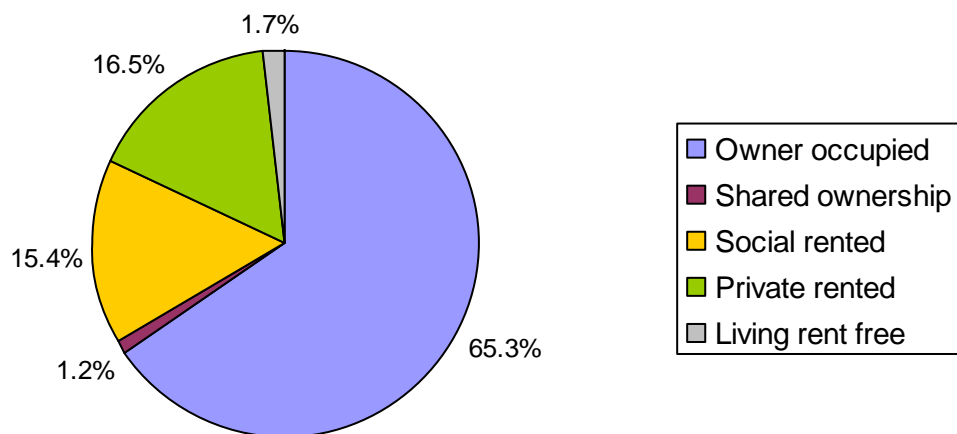
**Figure 2: Tenure of households in the housing sub-region in 2001**

Source: Census 2001



**Figure 3: Tenure of households in the housing sub-region in 2011**

Source: Census 2011



Figures 2 and 3 indicate that the percentage of households in the housing sub-region that are privately rented has increased significantly from 11% in 2001 to 17% in 2011, whereas the percentage of households that are owner occupied has fallen from 69% in 2001 to 65% in 2011, reflecting the changes seen on a national level.



## Housing Development

**Housing completions fell by 1% in 2011-12, and still remain well short of pre-recession levels.**

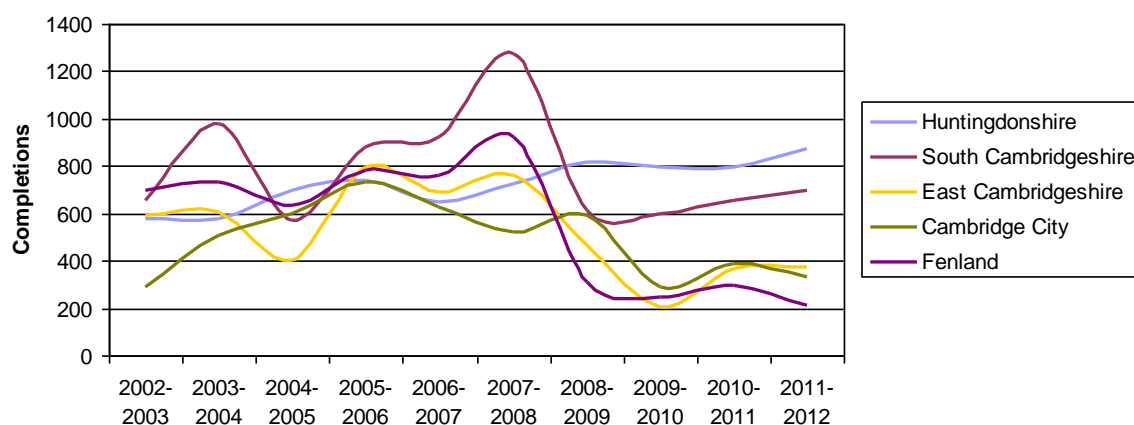
*There has been a very slight drop in the number of houses built during the past year and the completions total still falls well short of the levels seen in the years from 2005 to 2008. This reflects the slow recovery of the local economy following the recession. Of all the dwellings completed, 23% were affordable.*

This section provides a brief commentary on the progress of housing development in Cambridgeshire, based on data collected and prepared by the Research and Monitoring team at Cambridgeshire County Council, with a nominal survey date of 31 March 2012, <http://www.cambridgeshire.gov.uk/environment/planning/policies/monitoring/>.

While the total number of housing completions in Cambridgeshire for the year up to 31 March 2012 remains low, the district breakdown shows that this slowdown in building rate is not uniform across the county. The number of dwellings completed in Huntingdonshire was the highest recorded in the last ten years, while the number completed in South Cambridgeshire also remained relatively high. Fenland has seen the biggest slump in house building with only 200 dwellings built in the monitoring year. Of the new homes built in 2011-12, 51% were built on previously-developed ('brownfield') land, over the past ten years this figure has been increasing as land is being better utilised.

**Figure 4: Dwelling completions (net) by district**

Source: Cambridgeshire County Council – Research and Monitoring



Overall, the number of completions for 2011-12 in Cambridgeshire is at around the same level for as 2010-11; however with some major developments on the southern fringe of Cambridge that are due to start construction in the coming months, this figure may rise in future.

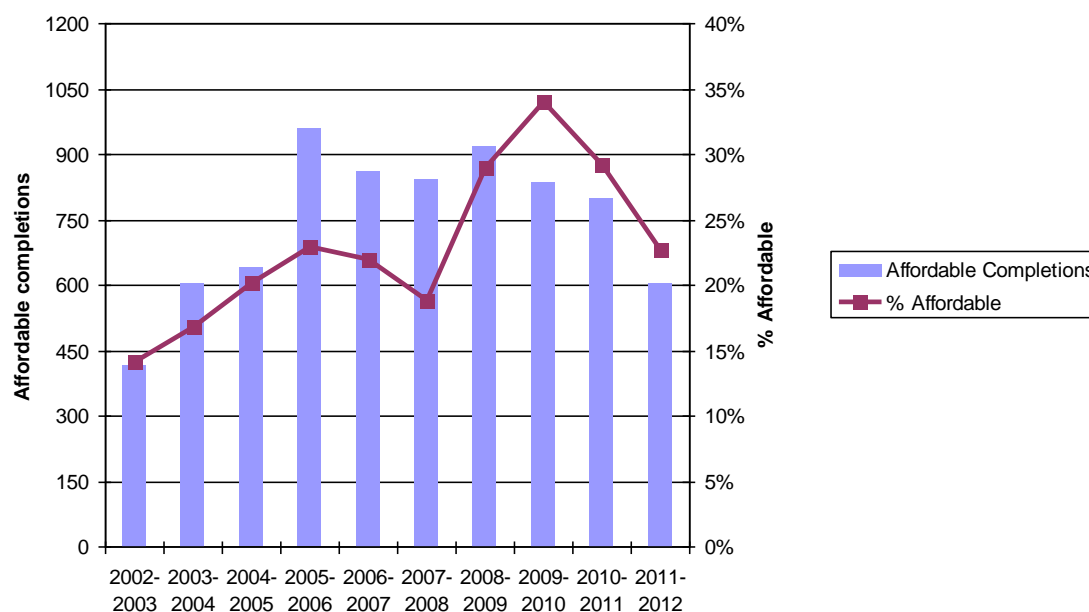
### Affordable Dwellings

A lot of progress has been made in increasing the supply of affordable housing in all districts in Cambridgeshire. However, in 2011-12 the percentage of affordable completions was only 23%, down on the previous three years. Following the financial crisis late in 2008 it became evident that on several larger construction sites there was increased focus on completing the affordable dwellings as opposed to the market housing which became increasingly difficult to sell. This accounts for the higher levels of affordable housing completed in the three years prior to 2011-12. As highlighted in the Research and Monitoring team's 2012 Housing Development Report, the drop in affordable housing is concerning given the need, particularly in the south of the county, to provide a choice of housing tenures.



**Figure 5: Affordable dwelling completions (gross) in Cambridgeshire**

Source: Cambridgeshire County Council – Research and Monitoring



Overall, since 2002 there has been an increase in the density of completed dwellings within Cambridgeshire, from 29 dwellings per hectare (dph) in 2002 to 33 dph in 2012. As expected, in 2012 the average density is far higher for urban districts when compared to rural ones, 88 dph in Cambridge City compared to 21 dph in Fenland. It should also be noted that the dph across all districts became more volatile from 2008 and is perhaps a reflection of the instability in the housing market from that time.

### New Dwellings by Size

**Figure 6: Dwelling completions by district and number of bedrooms, 2002-2012**

Source: Cambridgeshire County Council – Research and Monitoring

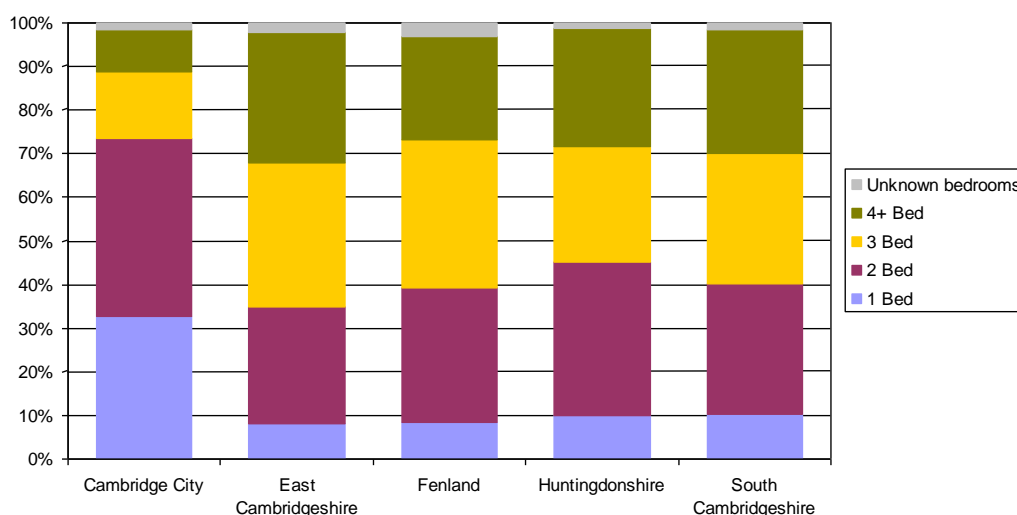


Figure 6 gives an indication of the distribution of new dwellings by size. The proportion of one and two bedroom dwellings that have been completed in Cambridge City is much higher than in the more rural districts where there are higher proportions of three and four-plus bedroom dwellings. This is likely to be due to a number of factors, such as the size and value of sites, as well as the higher demand for flats and smaller residences within the urban area. Over the whole county, the proportion of one and two bedroom dwelling completions steadily increased from approximately 25% of dwellings in 2001-2002, to over 55% in recent years mainly at the expense of the larger four or more bedroom houses, although in the past year this proportion has fallen again to just below 46%.

## House Prices and Sales

### Bank lending restrictions have had a disproportionate effect on first time buyers.

*Cambridge City is the most expensive area in the sub-region followed by South Cambridgeshire. The average house price in Cambridge is over double the average house price in Fenland, the cheapest area. Housing sales almost halved in 2008 compared with the equivalent period in previous years and in recent times fewer cheaper properties have been sold. House sales across the sub-region dropped to a low of 9,800 in 2008, but have since recovered to around 11,500 in 2011.*

**Table 4: Average house prices, Q3 2012-13**

Source: Land Registry of England and Wales

Area	Average price Q3 2012-13	% change on Q2 2012-13	% change on Q3 2011-12
Cambridge	£349,064	7.6%	7.6%
East Cambridgeshire	£214,920	2.6%	0.4%
Fenland	£148,364	4.4%	0.0%
Huntingdonshire	£211,527	1.9%	5.4%
South Cambridgeshire	£303,672	7.0%	3.0%
Forest Heath	£186,625	4.3%	5.8%
St Edmundsbury	£231,105	11.2%	2.9%

Table 4 shows the average house price across the housing sub-region in quarter three of 2012-13. The £200,000 range in the average house price across Cambridgeshire highlights the breadth of housing around the county.

**Figure 7: Average house price and number of sales, 2001-2011**

Source: Communities and Local Government

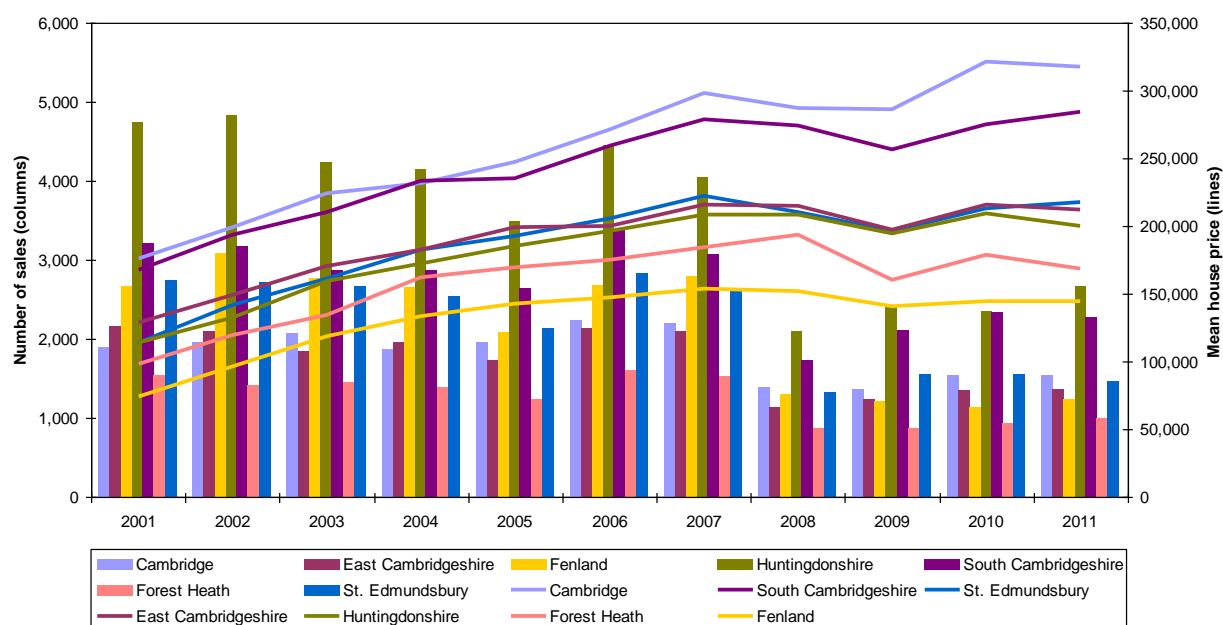


Figure 7 shows the number of sales per year and the mean house price per year for 2001 to 2011. House prices decreased slightly between 2007 and 2009, and have since increased, and are still considerably higher than in 2001. The number of sales in the sub-region as a whole decreased from around 18,000/year from 2001 to 2007 to a low of 9,800 in 2008. This has since recovered to around 11,500 in 2011.

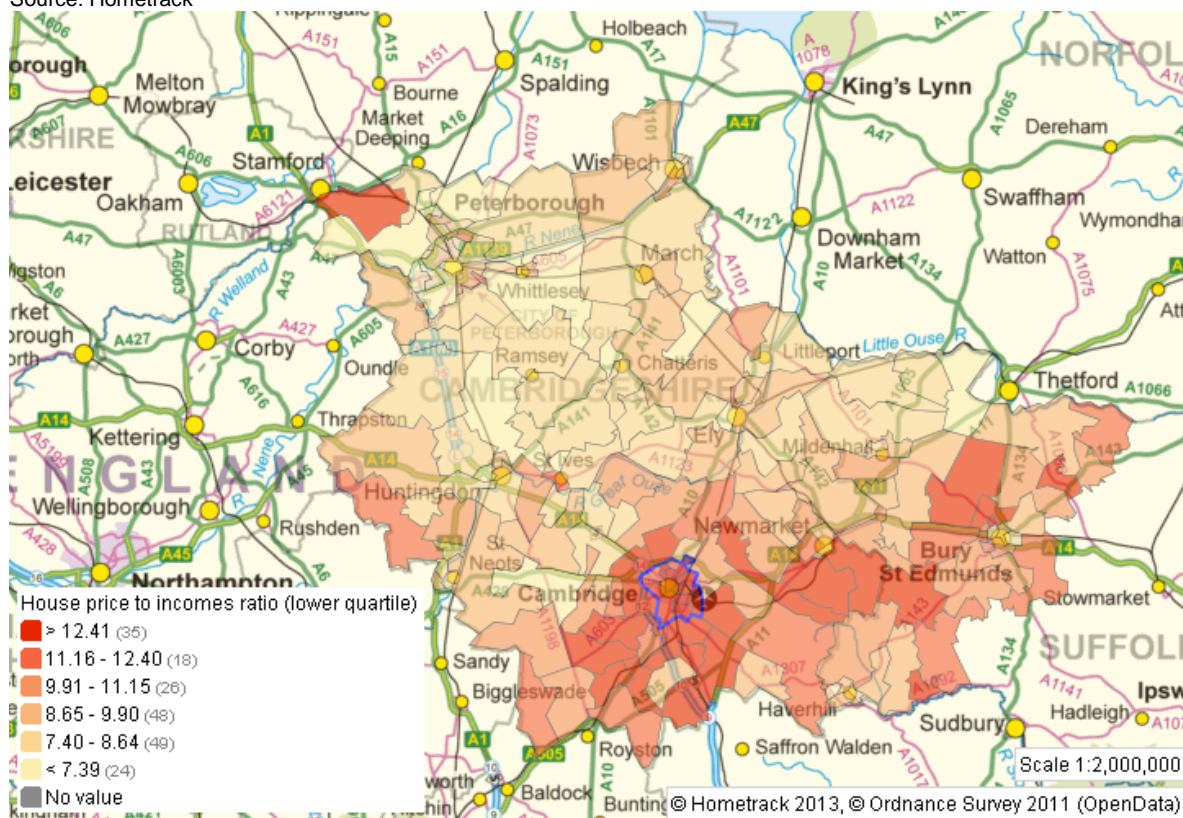
## Affordability

**In the majority of wards across the sub-region, housing is less affordable than across the East of England as a whole.**

*The cheapest homes in the cheapest wards in the Cambridge sub-region are still classed as 'unaffordable'. In the most unaffordable wards, lower quartile house price is around 14-23 times income, compared with a 9.73 ratio across the region.*

### Map 1: Lower quartile house price to lower quartile income ratio by ward

Source: Hometrack



Map 1 compares the lower quartile house price and the lower quartile income by ward as a general measure of affordability for the lower end of the market. Homes in the northern districts of the sub-region are comparatively more affordable than in the southern half of the area. The Housing Market Assessment Guidance<sup>1</sup> states that “A household can be considered able to afford to buy a home if it costs 3.5 times the gross household income for a single earner household and 2.9 times the gross household income for dual income households.” Even the cheapest homes in the cheapest wards are over 6 times the lower quartile income in that area (see Table 5). The lower quartile house price is around 14 to 23 times income in the most expensive wards (all in Cambridge City and South Cambridgeshire). For the East of England as a whole, the lower quartile house price to lower quartile income ratio is 9.73.

<sup>1</sup> CLG, (2007) "Strategic Housing Market Assessments: Practice Guidance Version 2"

**Table 5: Top ten “most affordable” wards**

Source: Hometrack 2013

Ward	District	Ratio*
Upwood and The Raveleys Ward	Huntingdonshire	6.20
Manea Ward	Fenland	6.36
Bourn Ward	South Cambridgeshire	6.37
Bassenhally Ward	Fenland	6.63
Waterlees Ward	Fenland	6.79
Benwick, Coates and Eastrea Ward	Fenland	6.93
Delph Ward	Fenland	6.93
Ely South Ward	East Cambridgeshire	6.93
Doddington Ward	Fenland	7.06
Slade Lode Ward	Fenland	7.07

**Table 6: Top ten “least affordable” wards**

Source: Hometrack 2013

Ward	District	Ratio*
Newnham Ward	Cambridge	22.99
Market Ward	Cambridge	19.15
Queen Edith's Ward	Cambridge	17.91
Coleridge Ward	Cambridge	15.55
East Chesterton Ward	Cambridge	15.54
Barton Ward	South Cambridgeshire	15.26
Abbey Ward	Cambridge	15.02
Cherry Hinton Ward	Cambridge	14.77
Arbury Ward	Cambridge	13.96
Romsey Ward	Cambridge	13.94

\*Ratio of lower quartile house price to lower quartile income.

## Population, Housing and Employment Forecasts: Technical Report

The Cambridgeshire & Peterborough Joint Strategic Planning Unit and Chief Planning Officers commissioned Cambridgeshire County Council Research and Performance Team to produce this technical report<sup>2</sup> to add value and provide guidance and support in developing homes and jobs targets in future stages of local plans. The indicative dwellings figures for the strategic housing market area are considered further in SHMA 2012 Chapter 12: Forecasts for homes of all tenures<sup>3</sup>.

The technical report presents the available population, jobs and dwellings projections from 2011 to 2031 (2036 for Huntingdonshire), in order to forecast the number of jobs and dwellings in the future.

To give an indication of development needs in 2031, a population figure is first determined for each of the districts in the Housing Market Area. This is done by identifying the broad convergence of a range of population projections and forecasts. For Cambridgeshire, these forecasts, which are adjusted to take account of the 2011 Census, converge on a population of **767,000** in 2031. This figure takes into account the implications of the additional jobs growth in Huntingdonshire, to be generated by the enterprise zone at Alconbury, and the loss of South Cambridgeshire's armed forces population by 2031.

<sup>2</sup> [http://www.cambridgeshireinsight.org.uk/housing/current-version/PopHseEmp\\_TechReport2013](http://www.cambridgeshireinsight.org.uk/housing/current-version/PopHseEmp_TechReport2013)

<sup>3</sup> <http://www.cambridgeshireinsight.org.uk/housing/current-version>

The population figures for each district provide a basis for determining jobs and “demand for dwellings” figures, by using an economic forecasting model with the population forecasts adjusted to the indicative population figures.

In this case, employment growth is determined from the East of England Forecasting Model (EEFM), with the population figures in 2031 adjusted to reflect the population growth, so the scale of the indicative jobs growth reflects that of the population growth. Furthermore, in a similar way the EEFM is also used to determine housing growth, thereby providing a consistent set of population, jobs and dwellings figures.

The sum of the indicative dwellings figures provides a “demand for dwellings” figure for the Housing Market Area of 93,000 new homes over the period 2011 to 2031. Table 7 provides a summary of the indicative change in population, jobs and dwellings numbers over the next twenty years across the Housing Market Area.

**Table 7: Indicative population, jobs and dwellings change from 2011 to 2031/2036\* by district for Cambridge Housing Market Area**

Source: CCC Research and Performance - Population, Housing and Employment Forecasts Technical Report 2013

District	Population	Jobs	Dwellings	Ratio of new jobs to new dwellings
Cambridge	27,000	22,000	14,000	1.6
East Cambridgeshire	26,000	7,000	13,000	0.5
Fenland	22,000	5,000	12,000	0.4
Huntingdonshire	31,000/39,000*	15,000/19,000*	17,000/21,000*	0.9
South Cambridgeshire	38,000	22,000	19,000	1.2
Forest Heath	13,000	3,000	7,000	0.4
St Edmundsbury	19,000	7,000	11,000	0.6
Housing sub-region	176,000	81,000	93,000	0.9

Table 8 shows dwellings change from 2011 to 2031, as well as the affordable housing need for the same period. Affordable housing need is the sum of current need and newly arising need. The calculation of affordable housing need is part of, not in addition to, the objectively assessed need for the total number of homes. In any consideration of affordable housing need against overall dwelling requirement, it is important not to take account of new build affordable housing within the affordable need calculation, as these are included in the overall dwelling requirement figure.

**Table 8: Dwelling change (all tenures) and affordable housing need, 2011 to 2031/2036\***

Source: Strategic Housing Market Assessment 2012, Chapter 12

District	Dwelling change 2011 to 2031/2036*	Affordable housing need 2011 to 2031/2036* (current + newly arising) Based on 2011/12 data
Cambridge	14,000	17,131
East Cambridgeshire	13,000	6,197
Fenland	12,000	7,927
Huntingdonshire	17,000/21,000*	10,259/11,996*
South Cambridgeshire	19,000	11,838
Cambridgeshire	75,000	53,351
Forest Heath	7,000	5,935
St Edmundsbury	11,000	7,650
Housing sub-region	93,000	66,936

## Business and Retail

### Business Development

#### High gains in business floorspace in recent years, but net loss in 2011-12.

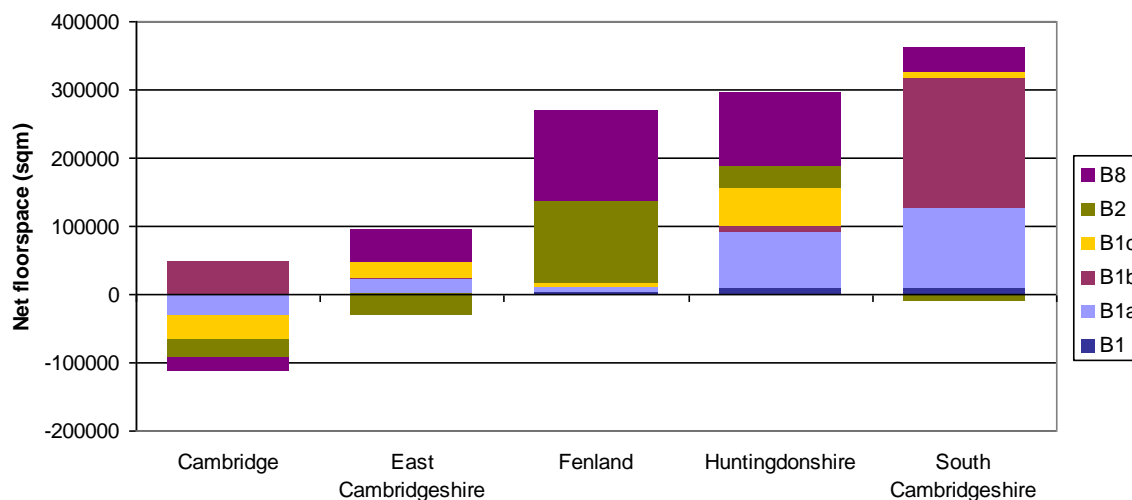
*There was a net loss of business floorspace in 2011-12. Gains in Cambridge, Fenland and Huntingdonshire were overshadowed by losses in East and South Cambridgeshire. Since 1999 there has been an overall decline in floorspace in Cambridge City, but with a large gain in 2011-12. 2010-11 saw very high completions of B1a office floorspace, most significantly in Huntingdonshire. There is currently no shortage of business land committed for development in Cambridgeshire.*

This section provides a brief commentary on the progress of business development in Cambridgeshire, based on data collected and prepared by the Research and Monitoring team at Cambridgeshire County Council, with a nominal survey date of 31 March 2012, <http://www.cambridgeshire.gov.uk/environment/planning/policies/monitoring/>.

In Cambridgeshire, 69,082 sqm of new business floorspace was completed during 2011 to 2012. Taking into account losses from business to other uses over this period, this has resulted in a net loss of 29 sqm. This is the first time that an annual loss in business floorspace has been recorded in recent history.

#### Figure 8: Net business completions, 1999-2012

Source: Cambridgeshire County Council – Research and Monitoring; B1 (unspecified); B1a (offices); B1b (research and development); B1c (light industry); B2 (general industry); B8 (storage and distribution)



The total amount of new business floorspace built between 1999 and 2012 in Cambridgeshire was 1,175,252 sqm. Taking into account losses from business to other uses over the twelve year period, this has resulted in a net increase in floorspace of 916,690 sqm. Figure 8 shows a high proportion of this new development has been in Fenland, Huntingdonshire and South Cambridgeshire with an overall net loss of business floorspace recorded in Cambridge City. In 2011-12, low gains of new business floorspace were counteracted by equivalent losses resulting in a net loss of 29 sqm across the whole county. Since 1999, just under 50% of additional employment floorspace has been built on previously-developed ('brownfield') land.



Table 9 shows that the largest gain in business floorspace in 2011-12 was seen in Cambridge. Despite seeing large losses in office and light industry floorspace, Cambridge's gain in research and development floorspace was able to generate a relatively high net increase.

Fenland was also able to generate an overall net gain in business floorspace which was largely due to an increase in the amount of general industry in the district. This was against the trend in the other Cambridgeshire districts, which all saw net losses in this use class. In the case of Huntingdonshire, this loss was over 10,500 sqm of floorspace, the largest change in any category across the county. In Huntingdonshire, this loss was against increases in almost all other use classes.

East Cambridgeshire saw the most significant overall loss in business floorspace, largely due to losses in general industry. This loss was offset, to an extent, by gains in the storage and distribution category.

South Cambridgeshire's overall loss was a consequence of net losses in business floorspace for offices and general industry. However, these negative changes were almost balanced by net increases in research and development and storage and distribution floorspace.

**Table 9: Net business completions in Cambridgeshire by use class and district in 2011-12**

Source: Cambridgeshire County Council – Research and Monitoring; B1 (unspecified); B1a (offices); B1b (research and development); B1c (light industry); B2 (general industry); B8 (storage and distribution)

Area	Net change in floorspace (sqm)						
	B1	B1a	B1b	B1c	B2	B8	B1-B8
Cambridge	-224	-1,935	9,179	-4,695	-425	912	2,812
East Cambridgeshire	186	-271	0	999	-8,093	3,912	-3,267
Fenland	731	-1,549	0	591	2,731	-1,300	1,204
Huntingdonshire	3,731	-437	0	1,450	-10,662	5,977	59
South Cambridgeshire	0	-5,057	5,461	-104	-4,460	3,323	-837
Cambridgeshire	4,424	-9,249	14,640	-1,759	-20,909	12,824	-29

At 31 March 2012 a total of 2,096,978 sqm of new business floorspace had planning permission or had been allocated by the District Councils in Cambridgeshire. Over 45% of this total commitment is for B8 storage and warehousing with a very large proportion of this located in Huntingdonshire. By far the largest individual business commitment in Cambridgeshire is the outline planning permission for 650,000 sqm of warehousing at Alconbury Airfield which covers the area of the newly designated Enterprise Zone.

Nearly 20% of the overall committed total is for unspecified B1 development spread evenly across the four rural districts. In many cases this is made up from proposed extensions to existing business parks including Granta Park near Abington, Angel Drove in Ely, March Trading Estate, and the business parks at Cambourne and St Neots.

There are small projected losses of B1, B1c, B2 and B8 floorspace in Cambridge City but significant commitments for B1a and B1b development. These figures are boosted by the very large permissions at Addenbrooke's Hospital and the Station Road redevelopment, both with outline planning permission.



## Retail and Town Centre Development

### **Retail growth and office space reductions in town centres.**

*Over the last twelve years town centres in all districts (apart from Huntingdonshire) have seen small reductions in office space and most (apart from Fenland) have seen an increase in town centre retail floorspace. The highest increases in retail floorspace were in Cambridge City and Huntingdonshire town centres. Future increases are projected in Cambridge City, Fenland and South Cambridgeshire. Around 7,800 sqm of new retail floorspace was built across Cambridgeshire between 2011 and 2012 compared to 5,100 sqm in the previous year. There has been a decrease in the amount of land committed for retail development in Cambridgeshire in the past year (81,000 sqm), compared to 104,000 sqm the year before.*

*The reduction in office space in Cambridge City could have negative implications for the growth of knowledge-based industries, with a new generation of owners seeking city centre locations.*

This section provides a brief commentary on the progress of retail and town centre development in Cambridgeshire, based on data collected and prepared by the Research and Monitoring team at Cambridgeshire County Council, with a nominal survey date of 31 March 2012, <http://www.cambridgeshire.gov.uk/environment/planning/policies/monitoring/>.

The total amount of new retail floorspace built between 1999 and 2012 in Cambridgeshire was 238,615 sqm. Taking into account losses of floorspace over the twelve year period, this has provided a net increase of 105,244 sqm. Over a third of the total increase has been within Cambridge City, while East Cambridgeshire has seen a low increase in retail development compared to the other districts.

In Cambridge City, nearly all of the additional floorspace was within the town centre area. In Huntingdonshire there were moderate increases in retail floorspace within the town centres, matched by increases out of town centre. All additional retail floorspace in Fenland was completed outside town centre areas with a net loss of floorspace of over 3,000 sqm in the town centres.

Development within the town centre areas has varied considerably across the county. In Cambridge City there have been large overall net gains of retail use within the centre with quite a significant decline in both professional services and offices. In fact all districts, except for Huntingdonshire, have seen small reductions in town centre office space. Fenland is the only district where there has been an overall reduction in the amount of retail space in its town centres.

Changes to the amounts of town centre floorspace in Cambridgeshire show no clear trend over time. Much involves the re-development of land and existing buildings as sites become vacant and opportunities come forward. In 2011/12 only a small amount of floorspace was built in town centres (2,904 sqm) and there were losses of 4,668 sqm resulting in a net loss of floorspace. There were no significant town centre completions in the county over the last year, just a lot of small schemes. In previous years, the completion of the Grand Arcade (37,500 sqm) and Bradwells Court (7,300 sqm) in Cambridge town centre contributed to the very large retail completions figures in 2007/08. This re-development also accounts for most of the retail losses in 2005/06, as existing shops were lost to create the new schemes.

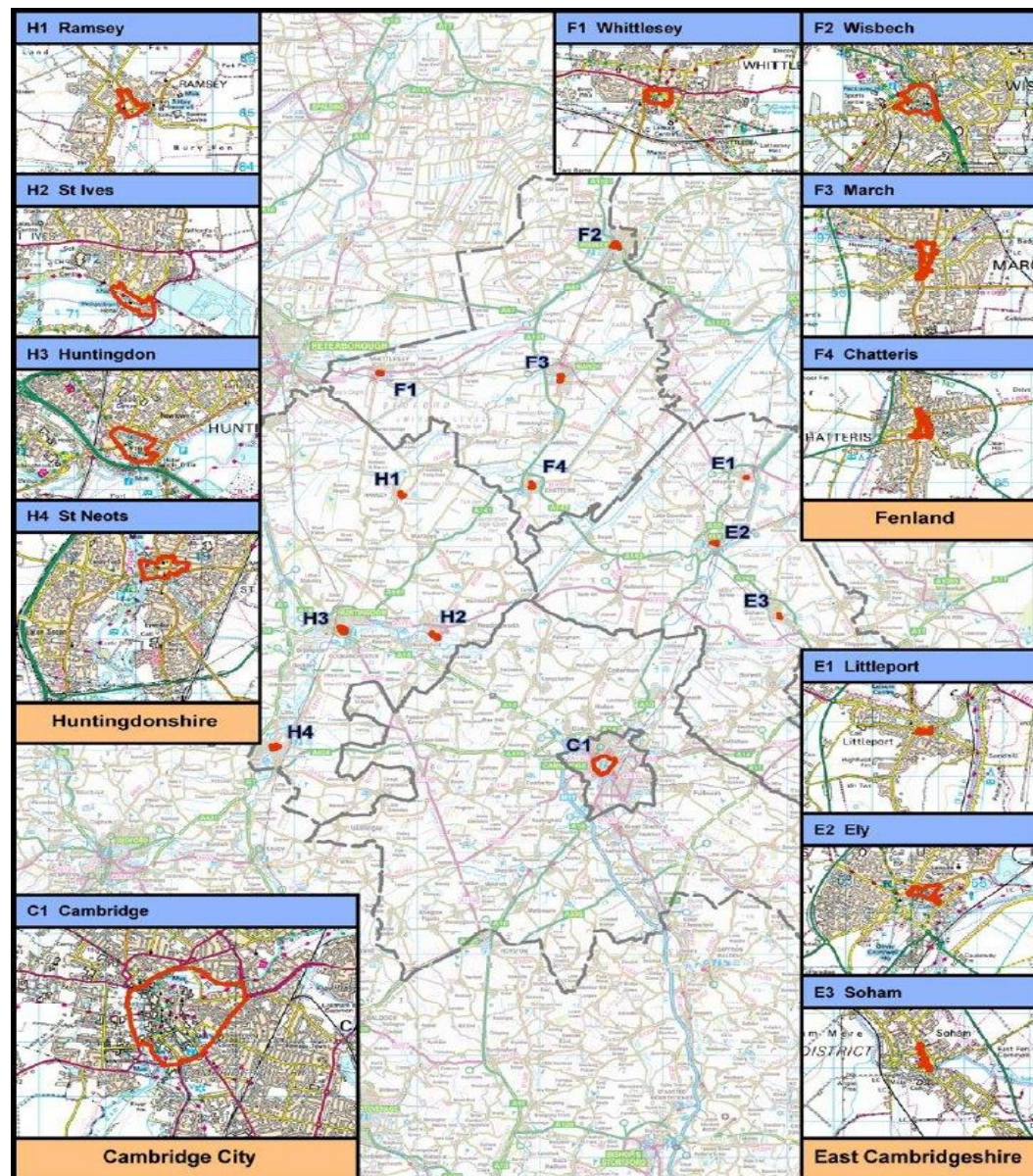
At 31st March 2012 a further 99,304 sqm of retail floorspace had planning permission or was allocated by the district councils for development, with a net commitment of 80,980 sqm. Most of the net increases are projected to be in Cambridge City and South Cambridgeshire.

The Cambridgeshire District and City Councils have reviewed the potential for additional retail development within town centres in their Retail Studies, details of which can be found on the Councils' websites.

The locations of town centres in Cambridgeshire are outlined by the red boundaries shown on the map below. These follow the town centre boundaries defined in the Cambridgeshire Districts' Local Development Frameworks.<sup>4</sup>

### Map 2: Town Centres in Cambridgeshire

Source: Cambridgeshire County Council – Research and Monitoring



<sup>4</sup> South Cambridgeshire District Council has no defined town centres.

## Employment Land

*District employment land reviews suggest an adequate supply of land across the county however it is important that that land is somewhere that businesses would wish to locate. Most districts appear to have taken this into consideration and are now looking at future sites for employment land.*

All the districts within Cambridgeshire have maintained employment land reviews which indicate the availability of allocated employment sites and the future potential employment sites in the Local Development Frameworks. However because the work on the reviews had been done separately in the different years, there has been little consistency of the review methodology and criteria for assessing the 'desirable' employment sites from a business/developer perspective. All the District Councils are currently reviewing their Local Plans and Core Strategies and these will look at sites in the future that can be used for housing and employment allocations.

The following sections present the methodology and criteria for assessing the desirable employment sites that the local planning authorities applied in their employment land reviews.

### Cambridge City and South Cambridgeshire

Cambridge City Council and South Cambridgeshire District Council worked together to produce a single Employment Land Review in 2008 for both the city and the surrounding district. They assessed both the existing allocated employment sites in the Local Plans which had not been developed and the potential employment sites which were nominated by land owners, agents and local authorities.

The review applied various criteria to assess the sites which included:

- Developer demand
- Business demand
- Location sequential test
- Sustainable access
- Strategic and local planning issues

South Cambridgeshire and Cambridge City are currently reviewing their Local Plans and will be looking at the land that can be allocated for employment and housing sites in the future. The Local Plan reviews are due to be completed around summer 2014.

### East Cambridgeshire

East Cambridgeshire undertook an employment land study alongside a labour market study in 2005. For the existing allocated sites, 10 out of 12 total sites were considered as desirable employment land. The criteria were:

- Location of site to main roads and access
- Location of site to facilities and labour force
- Visibility of the site and its environment
- Size of site and ability to create synergy
- Suitability for development of the site

East Cambridgeshire District Council is currently reviewing its Local Plan, including looking at land that can be allocated for employment and housing sites in the future. The Local Plan review is due to be adopted around summer 2013.



## **Fenland**

Fenland District Council undertook an Employment Land Review in 2007 which assessed both the existing employment sites and the potential sites. The criteria that were applied for assessing the existing sites were:

- Location sequential test
- Accessibility and transport mode
- Utilities supply and infrastructure provisions
- Environment constraints

For the potential sites, Fenland District Council invited land submissions on the sites above 0.25 ha. The assessment criteria for potential sites were:

- Location sequential test
- Accessibility and transport mode
- Utilities supply and infrastructure provisions
- Environment constraints
- Land ownership
- Strategic importance

Fenland District Council is also currently preparing a Local Plan, and will be looking at the land that can be allocated for employment and housing sites in the future. This Plan is due to be adopted around spring 2014.

## **Huntingdonshire**

Huntingdonshire's Employment Review was finished in 2007. It assessed both the existing allocated sites that remained as undeveloped and the potential sites that were nominated by land owners, land agents and the local authority itself.

The criteria applied to existing sites were:

- Market Assessment: Developer and Business Demand
- Sustainable Development and Planning Policy Assessment - previously-developed, sustainable accessibility, strategic and local planning policies

For the potential sites, two rounds of the assessment covered the following criteria:

- Sequential Test: 8 location categories
- Accessibility Test: proximity to workforce, reduce need for travel, travel mode
- Site Information
- Market Attractiveness
- Quality of the Wider Environment
- Policy Issues

Huntingdonshire is preparing a roll-forward of its existing development strategy via a review of its 2009 Core Strategy. The new Local Plan will identify at the land that can be allocated for employment and housing sites over the period up to 2036. It is due to be adopted in late 2014.

## Cambridgeshire's Commercial and Industrial Properties

*Across Greater Cambridge, Huntingdonshire has the highest amount of floorspace and Forest Heath has the lowest. The highest rateable value was in Cambridge City and the lowest in Fenland. In terms of use retail premises have the highest rateable value across Greater Cambridge and factories have the lowest. Per m<sup>2</sup>, retail space has the highest rateable value in Cambridge City whereas office space has the highest rateable value in South Cambridgeshire. Office space in Fenland has almost half the rateable value of office space across the rest of Greater Cambridge.*

As at 1 April 2008, the total floorspace of commercial and industrial bulk class properties in Cambridgeshire was 6,493 thousand square metres (sq m), and there were 14,264 commercial and industrial bulk class properties. The total amount of floorspace across Greater Cambridge was 10,318 thousand square metres. Huntingdonshire has the highest amount of floorspace and Forest Heath has the lowest. Cambridge City has the highest proportions of office and retail floorspace, but also the lowest proportions of warehouse and factory floorspace. South Cambridgeshire has the highest proportion of office premises, but also the lowest proportion of retail premises.

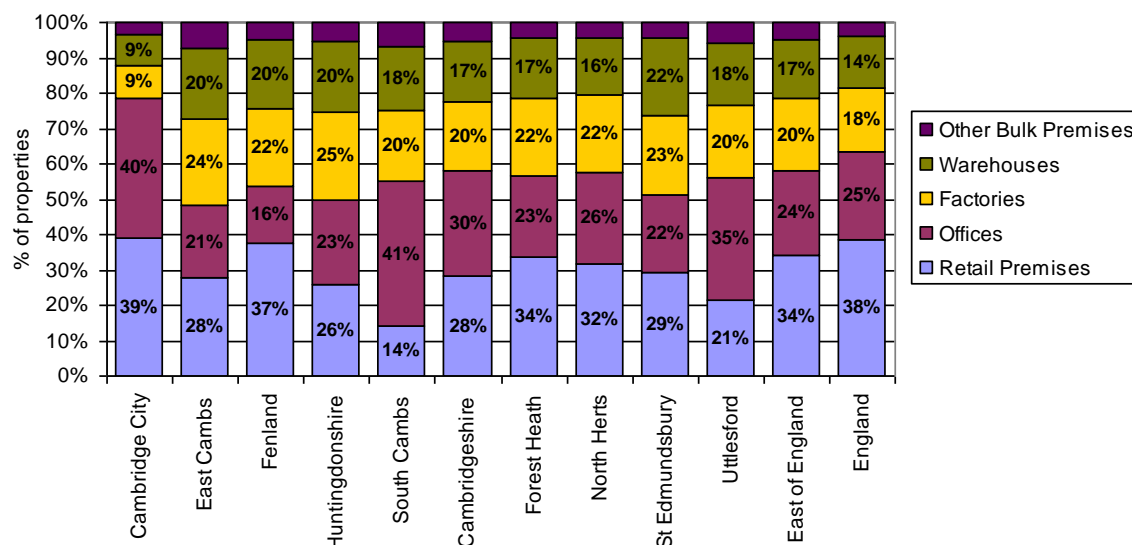
**Table 10: Commercial and industrial properties in Greater Cambridge by property type and district in 2008**

Source: CLG – Commercial and Industrial Floorspace and Rateable Value Statistics

Area	All Bulk Classes	Retail Premises	Offices	Factories	Warehouses	Other Bulk Premises
Cambridge City	3,269	1,277	1,294	305	285	108
East Cambridgeshire	1,568	433	325	378	321	111
Fenland	2,272	849	369	496	448	110
Huntingdonshire	3,758	980	882	943	747	206
South Cambridgeshire	3,397	479	1,396	681	613	228
Cambridgeshire	14,264	4,018	4,266	2,803	2,414	763
Forest Heath	1,583	535	359	350	270	69
North Hertfordshire	3,404	1,074	884	746	550	150
St Edmundsbury	2,844	826	630	641	620	127
Uttlesford	2,229	477	775	452	394	131
Greater Cambridge	24,324	6,930	6,914	4,992	4,248	1,240
East of England	136,889	47,007	32,623	27,547	23,077	6,635
England	1,346,547	516,809	334,713	245,263	194,572	55,190

**Figure 9: Commercial and industrial properties in Greater Cambridge by property type and district in 2008**

Source: CLG – Commercial and Industrial Floorspace and Rateable Value Statistics



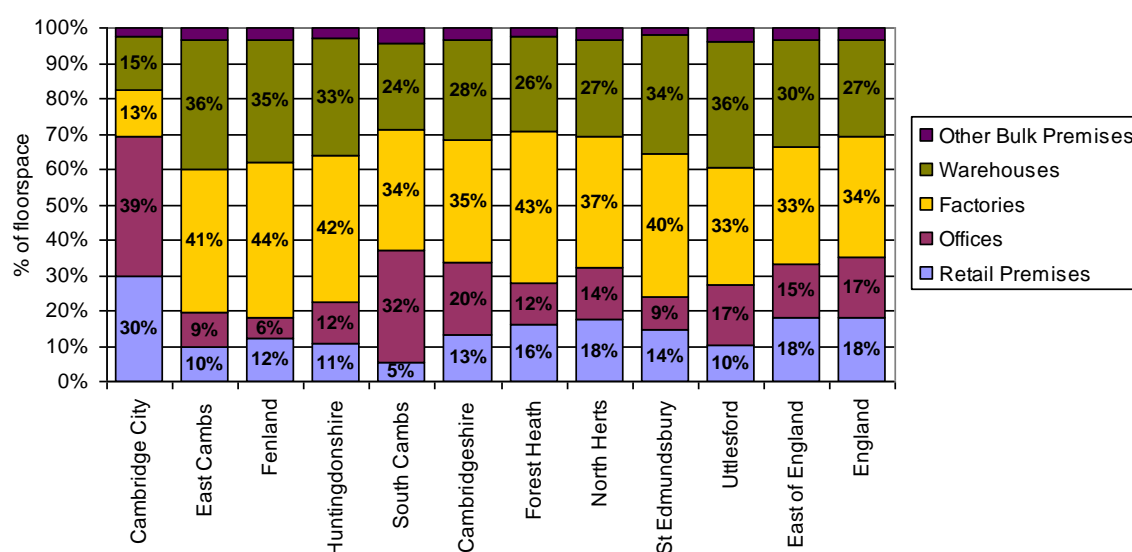
**Table 11: Commercial and industrial floorspace in Greater Cambridge by property type and district in 2008**

Source: CLG – Commercial and Industrial Floorspace and Rateable Value Statistics

Area	All Bulk Classes 000m <sup>2</sup>	Retail Premises 000m <sup>2</sup>	Offices 000m <sup>2</sup>	Factories 000m <sup>2</sup>	Warehouses 000m <sup>2</sup>	Other Bulk Premises 000m <sup>2</sup>
Cambridge City	1,214	360	479	162	183	31
East Cambridgeshire	658	65	62	267	239	24
Fenland	1,158	143	64	508	406	37
Huntingdonshire	1,896	201	228	787	624	56
South Cambridgeshire	1,567	86	495	534	382	70
Cambridgeshire	6,493	855	1,328	2,258	1,834	218
Forest Heath	590	96	68	254	156	15
North Hertfordshire	1,115	198	161	413	303	40
St Edmundsbury	1,484	215	140	600	498	32
Uttlesford	636	66	109	211	227	24
Greater Cambridge	10,318	1,430	1,806	3,736	3,018	329
East of England	56,904	10,287	8,664	18,704	17,186	2,062
England	561,777	100,208	97,566	192,322	152,485	19,196

**Figure 10: Commercial and industrial floorspace in Greater Cambridge by property type and district in 2008**

Source: CLG – Commercial and Industrial Floorspace and Rateable Value Statistics



As at 1 April 2008, the average rateable value of commercial and industrial bulk class properties in Cambridgeshire was £69 per m<sup>2</sup>, and the total rateable value was £445,139 thousand. The rateable value per m<sup>2</sup> across Greater Cambridge was £63, below the East of England average of £65, and the England average of £66. The rateable value varies by district. Cambridge City has the highest rateable value (£132 m<sup>2</sup>) and Fenland has the lowest (£31 m<sup>2</sup>). The rateable value also varies by bulk class (property type). Retail premises had the highest rateable value across Greater Cambridge (£133 m<sup>2</sup>) and factories had the lowest (£35 m<sup>2</sup>).

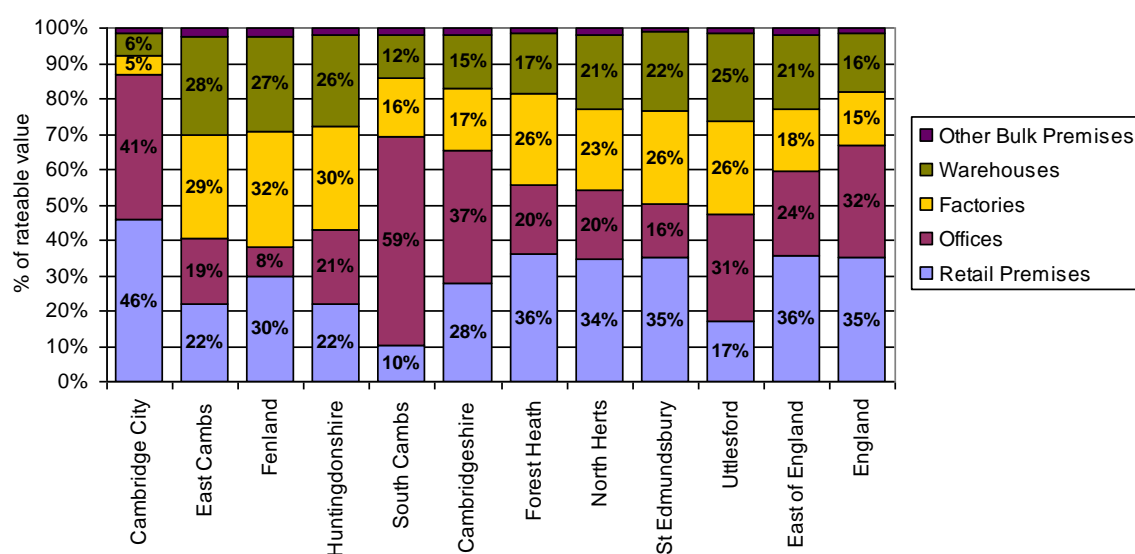
**Table 12: Commercial and industrial rateable value in Greater Cambridge by property type and district in 2008**

Source: CLG – Commercial and Industrial Floorspace and Rateable Value Statistics

Area	All Bulk Classes £000	Retail Premises £000	Offices £000	Factories £000	Warehouses £000	Other Bulk Premises £000
Cambridge City	159,876	73,480	65,427	8,427	9,853	2,689
East Cambridgeshire	29,411	6,398	5,581	8,584	8,099	748
Fenland	35,340	10,501	2,999	11,434	9,523	884
Huntingdonshire	101,399	22,174	21,191	29,933	26,001	2,101
South Cambridgeshire	119,113	12,234	70,484	19,519	14,295	2,581
Cambridgeshire	445,139	124,787	165,682	77,897	67,771	9,003
Forest Heath	27,104	9,793	5,306	6,972	4,670	364
North Hertfordshire	69,196	23,811	13,743	15,923	14,247	1,472
St Edmundsbury	73,342	25,624	11,383	19,008	16,495	832
Uttlesford	40,110	6,814	12,255	10,490	9,908	643
Greater Cambridge	654,891	190,829	208,369	130,290	113,091	12,314
East of England	3,702,801	1,315,900	880,144	664,822	769,559	72,376
England	37,026,183	13,021,037	11,773,032	5,586,670	6,037,134	608,310

**Figure 11: Commercial and industrial rateable value in Greater Cambridge by property type and district in 2008**

Source: CLG – Commercial and Industrial Floorspace and Rateable Value Statistics





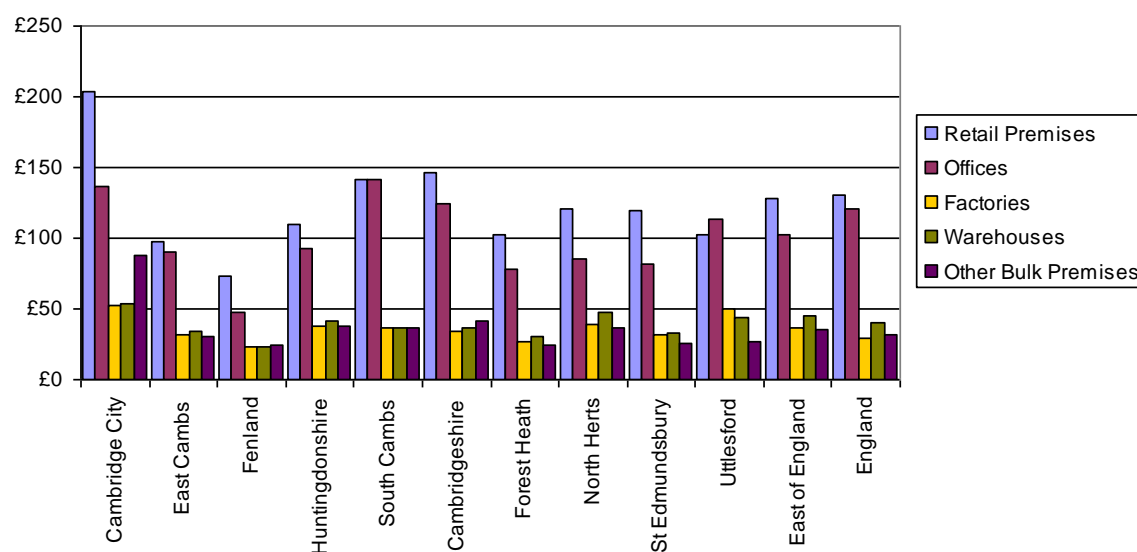
**Table 13: Commercial and industrial rateable value per m<sup>2</sup> in Greater Cambridge by property type and district in 2008**

Source: CLG – Commercial and Industrial Floorspace and Rateable Value Statistics

Area	All Bulk Classes	Retail Premises	Offices	Factories	Warehouses	Other Bulk Premises
Cambridge City	£132	£204	£137	£52	£54	£88
East Cambridgeshire	£45	£98	£90	£32	£34	£31
Fenland	£31	£73	£47	£23	£23	£24
Huntingdonshire	£53	£110	£93	£38	£42	£38
South Cambridgeshire	£76	£142	£142	£37	£37	£37
Cambridgeshire	£69	£146	£125	£34	£37	£41
Forest Heath	£46	£102	£78	£27	£30	£24
North Hertfordshire	£62	£121	£85	£39	£47	£37
St Edmundsbury	£49	£119	£82	£32	£33	£26
Uttlesford	£63	£103	£113	£50	£44	£27
Greater Cambridge	£63	£133	£115	£35	£37	£37
East of England	£65	£128	£102	£36	£45	£35
England	£66	£130	£121	£29	£40	£32

**Figure 12: Commercial and industrial rateable value per m<sup>2</sup> in Greater Cambridge by property type and district in 2008**

Source: CLG – Commercial and Industrial Floorspace and Rateable Value Statistics



## Infrastructure

### Broadband

#### Planned major broadband updates across the county.

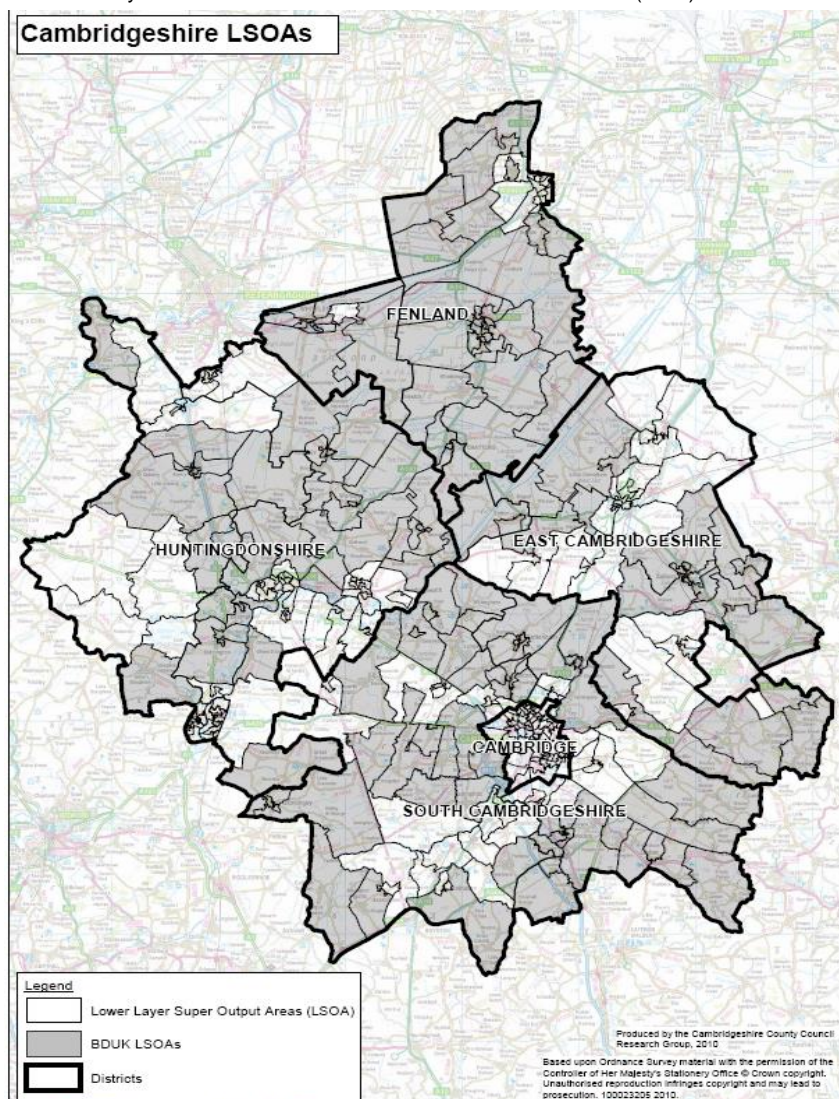
*Broadband speed is a critical issue across the county, with many businesses reporting that slow broadband speeds affect their business. Cambridgeshire County Council has received a grant to provide high speed broadband access throughout the county, the aim is to deliver 100% broadband coverage by 2015.*

In March 2013 Cambridgeshire County Council signed a contract with BT to provide fibre-based broadband to 98% of homes and businesses in Cambridgeshire by 2015. The new broadband infrastructure is to help "enable sustainable access" to at least 90 per cent of all premises, together with faster "downstream connectivity" of at least 2Mbps for all premises across Cambridgeshire and Peterborough. The total cost of the project will be £45 million, £16 million coming from BT and the rest from Cambridgeshire County Council, Peterborough City Council and Broadband Delivery UK.

The map below shows those areas (grey) that would have 75% or less coverage of next generation broadband access at the point when a market led rollout reached 65% of its potential. 41% of residents live in areas that were expected to receive a maximum of 75% next generation access coverage within the next two years with only a market led rollout.

#### Map 3: Next Generation Broadband Access rollout at 65% of market potential

Source: Analysis Mason – Next Generation Access Risk in the UK (2010)



## Transport

### **Transport congestion costs local businesses millions in lost productivity.**

*Cambridgeshire's roads are very congested. The latest evidence shows that traffic flow is double the national average on rural trunk 'A' roads in Cambridgeshire and this is expected to increase in the future.*

The local travel to work area increased significantly from 1991 to 2001. More people are commuting further than ever before exacerbating congestion on roads such as the A14.

### **Economic Impact**

Traffic congestion in the East of England currently costs businesses and residents £1bn a year and this is expected to double by 2021. The Greater Cambridge economy is already being limited by current congestion levels and this situation is expected to worsen in the future as overall traffic levels continue to rise.<sup>5</sup>

### **Key Transport Corridors**

The Transport in the East of England study completed in September 2008 identified a number of priority transport corridors for intervention through investigating where the direct costs of transport congestion (i.e. lost travel time) and the foregone wider economic benefits (i.e. agglomeration and labour force impacts) were greatest.

Three of the six corridors identified were around Cambridge (A428/A421, M11 and West Anglia Mainline corridor and the A14 corridor). Furthermore several property agents believe that congestion within Cambridge City will soon start to exert a negative influence on business decisions as to where they wish to locate.

Cambridgeshire County Council have successfully secured £5m from the Government's Local Sustainable Transport Fund (LSTF) to improve the A14 transport corridor and A10 transport corridor. These are locations most expected to see an increase in traffic due to a large amount of proposed housing development (17,500+ dwellings) planned in these areas.<sup>6</sup>

### **Local Traffic Data**

The County Council undertakes an annual Network Monitoring Report that draws together information on road casualties, road safety and traffic and travel trends for both rural and urban roads.<sup>7</sup>

### **Rural Traffic**

The highest growth since 2001 on national routes within the county has occurred on the A428 (42%), which is related to the development of Cambourne, although the A14 at Swavesey continues to have the highest daily traffic flows. On the county's principal road network (A roads), the highest growth over the past ten years has occurred on the A428 (42%), the A47 (24%), the A141 (15%), and the A10 (14%).

<sup>5</sup> <http://www.cambridgeshire.gov.uk/transport/strategies/currenttransportplans/local+transport+plan.htm>

<sup>6</sup> <http://www.cambridgeshire.gov.uk/transport/strategies/fundingbids/LSTF.htm>

<sup>7</sup> <http://www.cambridgeshire.gov.uk/transport/monitoring/Traffic+Monitoring+Report.htm>

**Table 14: All vehicle rural traffic growth by route**

Source: 2011 Traffic Monitoring Report, Cambridgeshire County Council

Road No.	Location	District	2001	2007	2008	2009	2010	2011	% Growth 2001-11	% Growth 2010-11
B1411	Ely- Little Downham	East Cambridgeshire	3,563	3,941	3,989	3,905	3,947	4,016	13%	2%
A10	Ely Littleport Bypass	East Cambridgeshire	8,524	10,100	9,484	10,531	9,715	9,713	14%	0%
C315	Chettisham	East Cambridgeshire	3,141	3,316	3,199	4,442	3,076	3,149	0%	2%
C134	Queen Adelaide	East Cambridgeshire	2,586	3,391	3,397	2,952	2,996	3,120	21%	4%
A1101	East of Littleport	East Cambridgeshire	2,929	3,317	3,237	3,056	2,940	2,905	-1%	-1%
A142	Chatteris- Mepal	Fenland	9,783	10,856	9,987	9,559	10,104	10,531	8%	4%
A141	Chatteris- Warboys	Fenland	7,229	8,491	8,139	8,165	8,203	8,295	15%	1%
A47	Thorney Toll	Fenland	12,453	14,027	15,712	15,218	14,112	15,409	24%	9%
A605	Coates	Fenland	4,102	4,210	3,471	3,886	4,399	3,972	-3%	-10%
B1093	Doddington- Benwick	Fenland	1,256	1,786	1,820	1,660	1,563	1,631	30%	4%
C85	Carters Bridge	Fenland	3,385	3,460	3,401	3,504	3,548	3,371	0%	-5%
B1050	Chatteris- Somersham	Fenland/Huntingdonshire	1,668	2,035	1,900	1,694	1,781	1,653	-1%	-7%
B1086	Somersham	Huntingdonshire	6,210	6,493	6,505	6,040	5,989	5,654	-9%	-6%
A1123	Bluntisham	Huntingdonshire	7,862	8,694	8,893	7,899	7,733	7,993	2%	3%
B660	Winwick	Huntingdonshire	657	844	753	761	800	821	25%	3%
A1(M)	South of Sawtry	Huntingdonshire	48,407	50,517	49,173	49,574	49,507	48,226	0%	-3%
B1043	Sth Sawtry Relief Road	Huntingdonshire	2,820	2,718	2,992	2,679	2,421	2,339	-17%	-3%
C111	Upwood	Huntingdonshire	3,939	4,446	4,288	4,042	4,374	4,201	7%	-4%
B1040	Warboys- Ramsey	Huntingdonshire	6,431	6,691	6,691	6,986	6,921	6,191	-4%	-11%
A14	Swavesey	South Cambridgeshire	58,152	58,734	58,809	57,641	58,819	58,234	0%	-1%
A428	Bourn Airfield	South Cambridgeshire	18,590	19,807	23,794	23,147	24,468	26,384	42%	8%
B1046	Bourn	South Cambridgeshire	3,047	3,845	2,658	2,432	2,481	2,618	-14%	6%
A603	Orwell	South Cambridgeshire	8,329	8,658	7,693	8,296	8,486	8,321	0%	-2%
C269	Meldreth	South Cambridgeshire	1,833	2,087	2,064	1,916	1,892	1,945	6%	3%
C320	Melbourn Village	South Cambridgeshire	5,260	4,384	3,868	4,188	3,972	4,278	-19%	8%
A10	Melbourn Bypass	South Cambridgeshire	10,464	11,444	11,420	11,393	10,779	11,038	5%	2%
A505	West of Flint Cross	South Cambridgeshire	11,925	14,419	13,497	13,417	13,533	12,590	6%	-7%
Total			254,545	272,711	270,834	268,983	268,559	268,598	6%	0%

## Market Town Monitoring

The County Council Traffic Monitoring Report (2011) also provides information for the key urban centres within Cambridgeshire. These figures are based on a cordon or defined area within each centre.

**Table 15: Urban centre average & maximum motor vehicle flow per outer cordon road 2011**

Source: 2011 Traffic Monitoring Report, Cambridgeshire County Council

	Motor vehicles	No. of roads	Average flow per road	Maximum flow
Cambridge	185,728	17	10,925	25,534
Huntingdon	75,514	5	15,103	16,373
St. Ives	45,833	5	9,167	16,374
Wisbech	58,735	7	8,391	16,002
St. Neots	50,592	6	8,432	13,706
Ely	38,685	7	5,526	12,085
Whittlesey	29,143	6	4,857	9,431
March	32,959	9	3,662	9,456
Chatteris	17,532	5	3,506	6,206
Ramsey	18,194	6	3,032	6,461

Huntingdon has the highest average flow per road of all urban centres within Cambridgeshire, followed by Cambridge and St Ives. The busiest urban cordon road is in Cambridge (Milton Road). The least busy cordon roads surround Chatteris and Ramsey. Wisbech and March are similar in population size however the average vehicle flow per road in Wisbech is more than double the average in March. This reflects the size of the town's catchment area for services and facilities such as shopping.

## **Road Safety and Accidents** (taken from 2012 Road Safety Monitoring Report, Cambridgeshire County Council)

The rate of death and serious injury per head of population in Cambridgeshire is 31% above the national average. However, as outlined below, this is related to the County having a significant volume of through traffic and higher than average traffic flows, and as a result of this Cambridgeshire's rate of killed or seriously injured casualties per km travelled is less than the national average.

Above average traffic density on rural roads is a significant factor in Cambridgeshire's high per capita casualty rate. The latest available figures show that traffic flow is nearly twice the national average on rural trunk 'A' roads in Cambridgeshire and 40% higher on other rural main roads in the county.

## **Cambridgeshire Integrated Development Programme**

The Cambridgeshire Integrated Development Programme (2009) identifies and costs the interventions required to deliver a joint vision for long term, sustainable, high quality growth. Within the programme is an evidence base on sub-regional infrastructure needs. £3.9 billion of infrastructure investment in transport, education, community facilities, health, open space, waste and utilities is needed to deliver Cambridgeshire's vision for sustainable economic and housing growth.

## **Cambridgeshire Guided Busway**

The Cambridgeshire Guided Busway opened to passengers in August 2011. In the first year, there were 2.5 million journeys on the Busway – 750,000 more than forecast. This demand led to a rapid increase in service provision with operators providing more buses per hour on the Busway.

In May 2012, 855 surveys were carried out with Busway users, showing that the Busway is contributing to reducing the number of private vehicle trips in the area as 24% of the passengers who made the same journey before the Busway opened had switched from car (as driver), and 13% had changed to the Busway from being given a lift. The Busway is used regularly, with 66% of respondents using the Busway at least twice a week. The majority of respondents (83%) were of working age, car availability amongst users was high, commuting was the most popular journey purpose on the Busway and the Busway was used by residents from a wide variety of income backgrounds.

## **Cambridgeshire Long Term Transport Strategy**

The Cambridgeshire Long Term Transport Strategy is being produced in order to:

- meet the needs of how people will travel and do business in the future
- provide a strategic transport strategy which supports sustainable growth across Cambridgeshire and Peterborough to 2031 in accordance with Local Plans
- consider longer term sustainable growth to 2050
- support the Greater Cambridge Greater Peterborough Growth Prospectus

The Long Term Transport Strategy provides a high level framework for strategic transport policies which support sustainable development and continued economic prosperity, enabling transport infrastructure to keep pace with planned growth. It provides a clear policy basis for investment decisions for strategic transport infrastructure and will be used to secure funding to deliver our transport priorities. Furthermore, it contains an Action Plan setting out our investment priorities and will provide an evidence base and build a case for improvements to the rail network and other infrastructure. The Strategy supports the Greater Cambridge Greater Peterborough Growth prospectus by helping to provide better transport infrastructure and services to support the economy. The Long Term Transport Strategy when approved will form part of the Cambridgeshire Local Transport Plan.



## Energy, Environment and Climate Change

### Fuel Poverty

*Fuel poverty is a particular issue in rural districts.*

**Table 16: Households in fuel poverty, Cambridge sub-region 2010 estimates**

Source: Department for Energy and Climate Change 2010

Area	Fuel Poor Households	Percentage of All Households
Cambridge	7,497	16.2%
East Cambridgeshire	4,764	13.7%
Fenland	7,680	19.2%
Huntingdonshire	7,637	11.3%
South Cambridgeshire	7,523	12.8%
Forest Heath	4,125	16.4%
St. Edmundsbury	6,866	15.6%
Housing Sub-Region	46,092	14.6%
East of England	380,969	16.0%

The above table shows the estimated number and percentage of households in fuel poverty in 2010. For these estimates fuel poverty is defined as households spending more than 10% of income on heating the home to a reasonable degree of thermal comfort (18-21°C).

There are three main factors behind fuel poverty – income levels, fuel costs and thermal efficiency of the housing stock. It can have serious and detrimental effects on both physical and mental health and well-being, with a recent estimate of 2,700 deaths per year nationally directly attributable to the issue (Hills 2012).<sup>8</sup>

A more detailed view of fuel poverty in the sub-region for 2009 is available at <http://atlas.cambridgeshire.gov.uk/Housing/FuelPoverty/atlas.html>. It shows that while overall levels of fuel poverty are quite low, there are some areas with quite high levels of fuel poverty (e.g. more than 25% of households). These are around the northern rural areas of Fenland, and rural areas of St Edmundsbury.

In March 2012, the Hills Review of Fuel Poverty suggested a new definition of fuel poverty, specifically targeting low income/high fuel cost households. No local level data are currently available using the new definition.

### Renewable Energy

**Renewable energy capacity increased at a steady rate between 1999 and 2009. Between 2009 and 2011 the rate of installation slowed to the point where in 2010-11 hardly any new capacity was installed. However, 2011-12 has seen an upturn with over 10MW installed (8.7MW of this was from photovoltaics).**

*The last few years have seen the growth of micro-generation – domestic wind turbines and photovoltaic cells. In 2012 commitments in renewable energy capacity came from wind power, biomass and photovoltaic power. Since 1999 over half of Cambridgeshire's renewable energy capacity has been installed in Fenland.*

<sup>8</sup> [http://www.decc.gov.uk/en/content/cms/funding/fuel\\_poverty/hills\\_review/hills\\_publicat/hills\\_publicat.aspx](http://www.decc.gov.uk/en/content/cms/funding/fuel_poverty/hills_review/hills_publicat/hills_publicat.aspx)

The installation of much improved energy efficiency measures coupled with the widespread adoption of household or community level renewable energy could help to alleviate fuel poverty. Furthermore, the rapid and comprehensive take-up of energy conservation, efficiency and renewable generation technologies will reduce carbon emissions and has the potential to open up significant new supply chain opportunities in the economy.

The Department of Energy and Climate Change is responsible for policies and guidance that will inevitably lead towards increased energy efficiency and renewable energy generation. These include:

- leading government efforts to mitigate climate change, both through international action and cutting UK greenhouse gas emissions by at least 80% by 2050;
- sourcing at least 15% of the UK's energy from renewable source by 2020;
- reducing demand for energy from industry, businesses and the public sector;
- helping households reduce their energy bills by installing gas and electricity meters that provide near real-time information on energy use in households and small businesses.

This section provides a brief commentary on the progress of renewable energy development in Cambridgeshire, based on data collected and prepared by the Research and Monitoring team at Cambridgeshire County Council, with a nominal survey date of 31 March 2012, <http://www.cambridgeshire.gov.uk/environment/planning/policies/monitoring/>.

The total amount of new renewable energy capacity installed between 1999 and 2012 in Cambridgeshire was 174.6168 MW. Prior to 1999 only 3.9172 MW capacity existed. Large advances in 2001-02 were mainly due to the building of a 36.85MW straw burning power station at Sutton in East Cambridgeshire. From 2005 to 2008 there was a fairly steady rate of development, mainly due to the building of a number of wind farms in Fenland and Huntingdonshire. Between 2009 and 2011 the rate of installation slowed to the point where in 2010-11 hardly any new capacity was installed. However, 2011-12 has seen an upturn with over 10MW installed (8.7MW of this was from photovoltaics).

Over half (92MW) of renewable energy capacity installed in Cambridgeshire since 1999 is located in the district of Fenland. This is due to the large number of wind turbines installed (61 in all). East Cambridgeshire also has a fairly high proportion of the renewable energy capacity (44MW), mainly due to the straw burning power station at Sutton.

At 31 March 2012 a total figure of 106.56 MW of renewable energy capacity had been granted planning permission. This compares to 72.99 MW with planning permission at 31 March 2011. Of the committed total, 85.747 MW is for wind power generation from 48 turbines. Thirteen of these turbines will be located at South Cambridgeshire's first wind farm at Wadlow Farm in West Wratting. The rest of the total is made up of 7.24 MW for biomass; and 13.579 MW for photovoltaic power (including two new solar farms of 5MW each at Haslingfield and Waterbeach in South Cambridgeshire).

The last few years have seen the growth of micro-generation domestic wind turbines and photovoltaic cells. In fact the solar market is the fastest growing area in the renewable energy sector nationally, and this can be seen in both the completion and commitments figures. The rise in photovoltaics is partly due to the Government's Feed in Tariff Scheme which is a programme designed to promote the uptake of a range of small-scale renewable and low-carbon electricity generation technologies.

However, the Government has cut by half the tariff paid to property owners for electricity they generate to the National Grid for all photovoltaic panels registered and installed after December 2011, so it is envisaged the amount installed may fall considerably in future years.



## CO2 Emissions

**CO2 emissions per head are generally higher than average across most Greater Cambridge districts (apart from Cambridge and North Hertfordshire).**

*Much of this will be down to the rural nature of the districts, car dependence, low energy efficiency of buildings and the nature of industry. High energy consumption could cause numerous problems for the area as fuel prices continue to increase.*

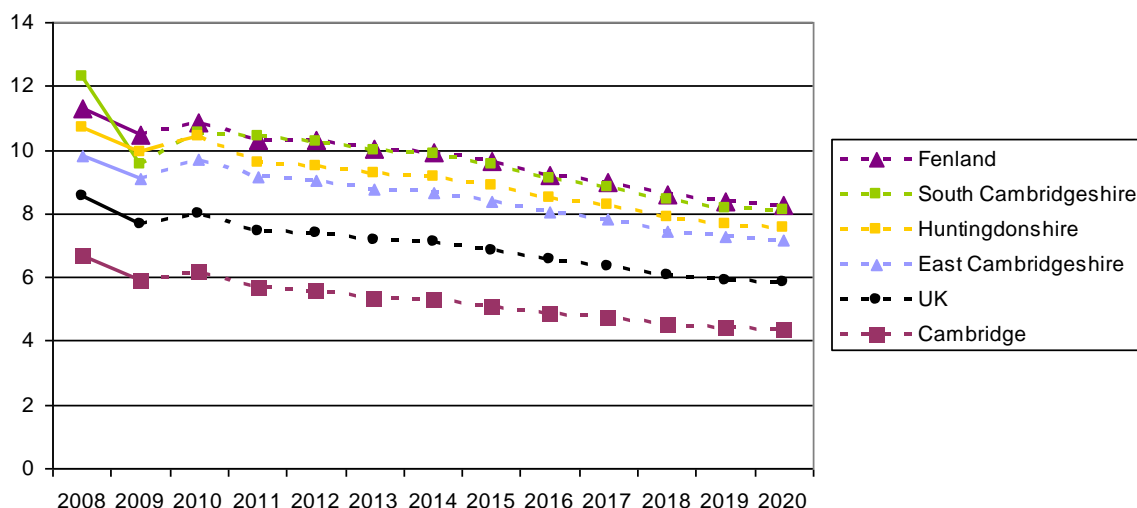
The Department of Energy and Climate Change (DECC) produces information on carbon emissions at local authority level based mainly on fuel consumption statistics.

The East of England Forecasting Model combines information from DECC on the amount of CO2 emissions in a given area with Oxford Economics calculations to provide a figure for CO2 emissions per head.

Cambridge City and North Hertfordshire are the only Greater Cambridge districts with carbon emissions per head figures lower than the national average.

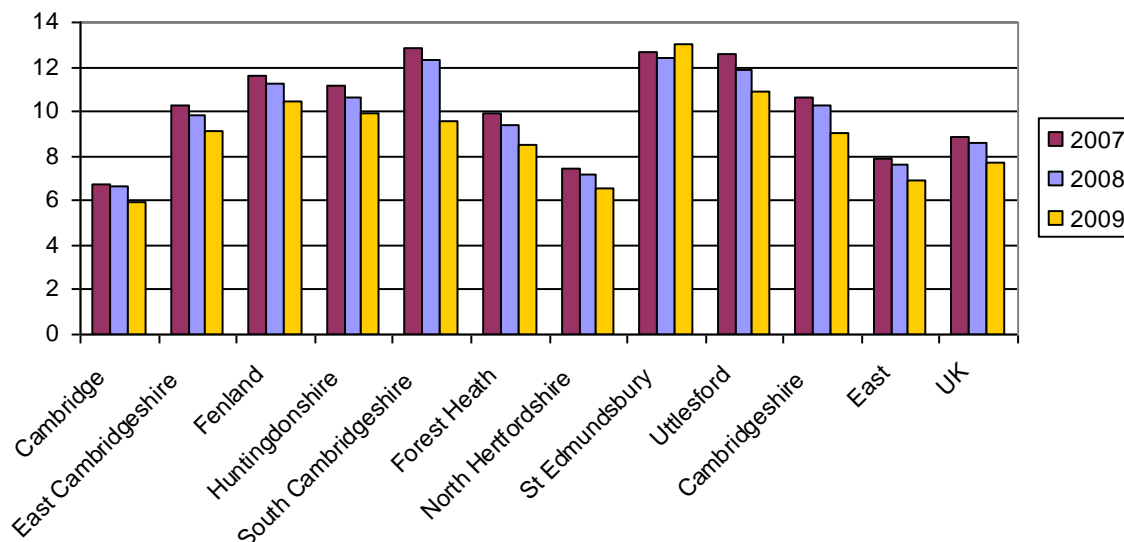
**Figure 13: Total (and forecast) carbon emissions per head by Cambridgeshire district (tonnes per head)**

Source: East of England Forecasting Model Spring 2012



**Figure 14: Total carbon emissions per head by Greater Cambridge district (tonnes per head)**

Source: East of England Forecasting Model Spring 2012



## Climate Change Adaptation

### Negative impact of climate change on food and farming and transport.

*Climate change could have and is having a particularly negative impact on the transport and food and farming industries, however there is little evidence of long term adaptation planning, particularly in the transport sector, or other affected sectors such as tourism, construction or IT.*

A report on the adaptation to climate change by businesses in the East of England was completed by SQW in March 2010, funded by the regional Climate Change Partnership.

The report found that the climate in the East of England has changed measurably over the past forty years. There is a clear trend of hotter summers and wetter winters which is expected to continue into the next few decades.

The East of England is particularly vulnerable to climate change impacts. Water shortages in summer are already a major issue and economic and housing growth in the region may create more demand.

Important economic activities in the region are heavily dependent upon weather and climate; for example, tourism and farming and food. The study focused on five business sectors and on two counties – Suffolk and Cambridgeshire. The sectors were Farming and Food, Tourism, Construction, Transport and IT-Telecoms.

The main finding of the study was that the extent of adaptation amongst small businesses is very limited. When hit by a severe weather event, the typical response is to tolerate the set-back rather than adapt the business.

For specific industries the opportunities and threats of climate change and the level of adaptation planning were investigated:

- **Tourism:** opportunities included extended season, increased demand for outdoor tourism and threats included natural environments adversely affected, water shortages, transport infrastructure interrupted for the tourism industry.
- **ICT/Telecomms:** opportunities included disruption of commuting by bad weather encourages use of homeworking, video-conferencing etc, new monitoring and risk management markets and threats included overheating servers, disruption of energy/telecoms infrastructure.
- **Transport sector:** opportunities included development of sophisticated vehicle and freight tracking systems could make it easier to avoid transport disruptions caused by weather and threats included road and transport hub closures, danger of heat to livestock, drivers put at risk in dangerous conditions.
- **Food and farming:** opportunities included longer growing season, new crops and new markets and threats included droughts and flooding, increase in pests and diseases.
- **Construction:** opportunities included new markets for sustainable buildings and water saving technologies, need for additional repair work caused by severe weather damage and threats included heavy rainfall causing delays on site, increased hazards to workers.

Across all sectors apart from food and farming, there was little evidence of adaptation to climate change or recognition of the need for longer term planning to address climate change. Within the food and farming sector some adaptation is more reactive and incremental and not requiring support. However actions to manage water represent a very substantial area of activity that relates to climate change and involves major schemes at farm level such as reservoir construction, new boreholes or coastal defences.

## Quality of Life

### Satisfaction with the Local Area

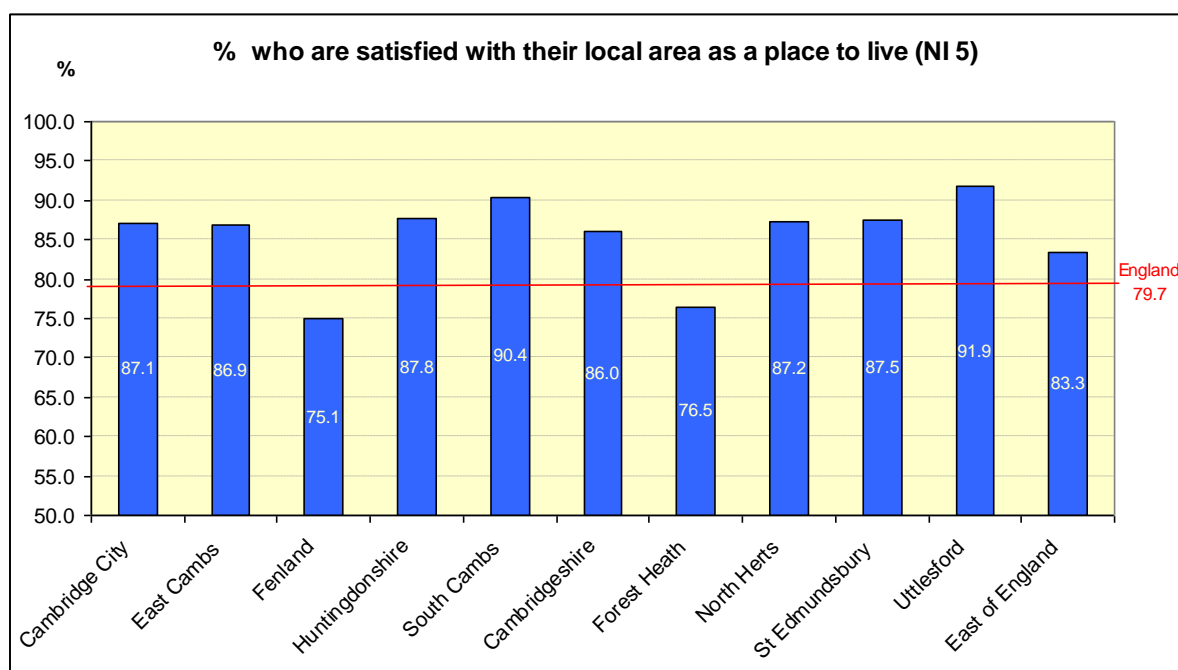
**Generally high levels of resident satisfaction in their local area as a place to live.**

*Satisfaction with their local area as a place to live is generally high among local residents, apart from Fenland and Forest Heath. This reflects the general pattern of lower skills levels and higher deprivation in these districts.*

The Place Survey was a national survey that ran in the autumn of 2008. Its main purpose was to collect views from local populations to help improve local public services. Local authorities across the country consulted with local residents to engage reactions and views concerning public services and the places people live. Included here are the results from local authorities in the Greater Cambridge area for some selected Place Survey indicators.

**Figure 15: Percentage who are satisfied with their local area as a place to live**

Source: Place Survey 2008

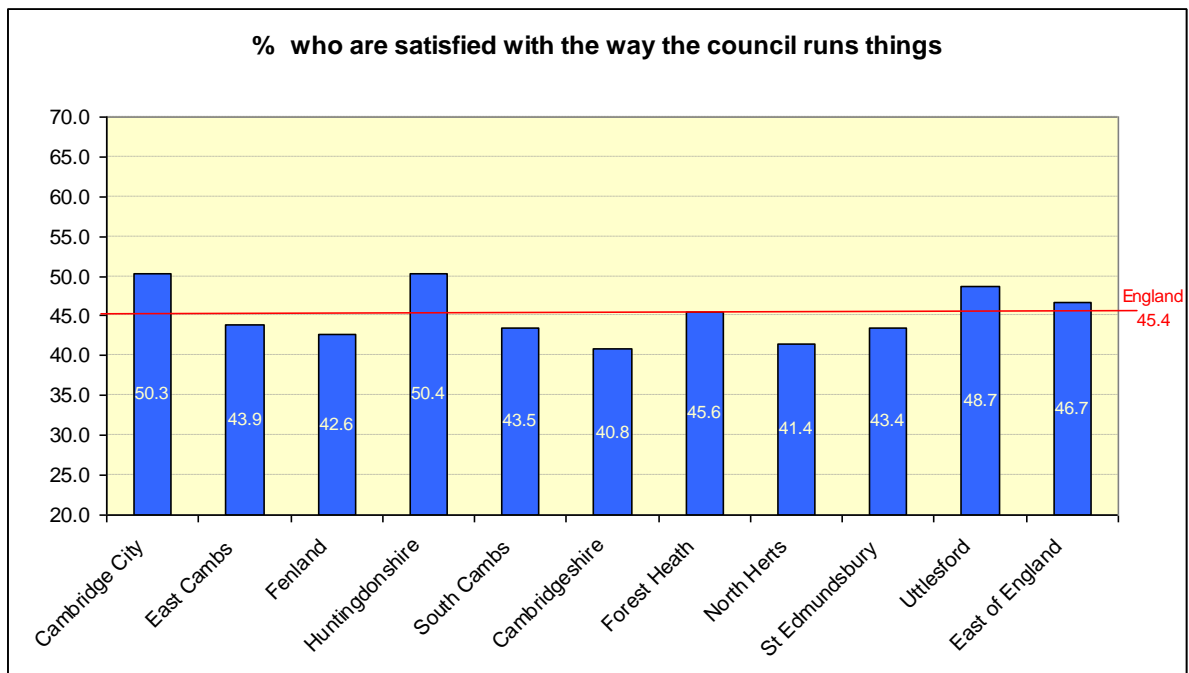


Local authorities in the Greater Cambridge area that report a lower rate than the national average for NI 5 are Fenland and Forest Heath. Respondents in the remaining authorities all report a high level of satisfaction with their local area; these authorities also exceed the East of England average. Uttlesford and South Cambridgeshire respondents are the most likely to be satisfied with their local area as a place to live.

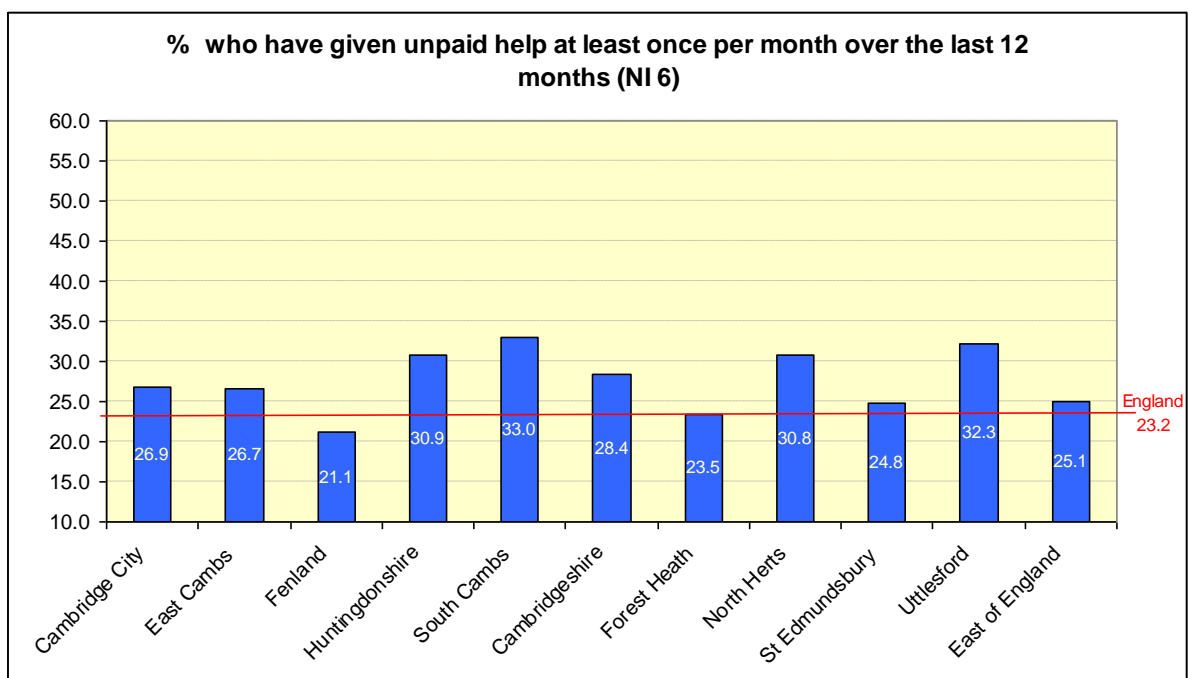
The Place Survey reveals there are low levels of satisfaction with the way their council runs things. Figure 15 shows that only Cambridge City and Huntingdonshire score over 50% of respondents satisfied with their council. Cambridgeshire County Council reports a particularly low figure for satisfaction with the way the council runs things, possibly reflecting negative press about the Guided Bus around this period.

**Figure 16: Percentage satisfied with the way the council runs things**

Source: Place Survey 2008

**Figure 17: Percentage who have given unpaid help at least once per month over the last 12 months**

Source: Place Survey 2008



The Place Survey reveals that people living in the districts South Cambridgeshire, Uttlesford, Huntingdonshire and North Hertfordshire are more likely to do volunteer work in their communities. Fenland is the only authority in the Greater Cambridge area below the national average for those giving unpaid help at least once a month in their local areas.

## Crime in Cambridgeshire

### Crime levels continue to decrease across the county.

*Levels of total crime continue to decrease in Cambridgeshire. The county recorded a decrease of 11% in total crime since last year, comparing 2012/13 with 2011/12. The county recorded a rate of 11 crimes per 1000 population compared to 12.5 crimes per 1000 population for the Eastern Region (for the period Dec 12 – Feb 13).*

The table below shows the relative performance of the districts for total recorded crime over the previous five years. All districts have experienced a decrease over the long term. Each district is aligned with a Community Safety Partnership (CSP), which works towards reducing crime, anti-social behaviour (ASB) and disorder under locally agreed priorities. South Cambridgeshire continued to record the largest percentage reduction in rate of total crime, whilst Fenland again recorded the lowest percentage reduction.

**Table 17: Rate of total crime per 1000 population for financial years from 2008/09 to 2012/13**

Source: Cambridgeshire County Council – Research and Performance

Area	2008/09	2009/10	2010/11	2011/12	2012/13	% change in rate (08/09-12/13)
Cambridge City	134.1	117.6	114.2	95.6	87.3	-35%
East Cambridgeshire	48.4	43.5	35.6	43.6	34.5	-29%
Fenland	74.6	74.6	71.5	66.8	54.1	-27%
Huntingdonshire	56.3	52.5	53.5	48.6	43.2	-23%
South Cambridgeshire	47.4	41.3	35.3	33.4	31.6	-33%
Cambridgeshire	71.3	65.0	61.6	56.4	49.7	-30%

Long-term performance has been good, crime has been reduced. But there are differences in performance and some CSPs are doing less well compared to their most similar group<sup>9</sup>. Performance on acquisitive crime (burglary, robbery and vehicle crime) is the main reason for this. The map overleaf shows the rate of total crime for all wards in Cambridgeshire in 2011/12. An interactive version of this map, including major crime types can be accessed at <http://atlas.cambridgeshire.gov.uk/Crime/atlas.html>.

The south of the county shows lower rates of total crime than the north, with urban areas such as towns and cities recording some of the highest rates. This follows national patterns of crime. When analysing crime a major consideration is deprivation and other indicators of need. Generally a similar pattern is seen when mapping deprivation rates across the county; at a district level: between Fenland and elsewhere; and at a ward level: between parts of Wisbech, Cambridge and Huntingdon and elsewhere. These differences can create considerable barriers to achieving crime reductions.

The nature of the problems facing districts varies within Cambridgeshire and the Community Safety Partnerships use analysis of crime and factors that influence crime, offending and protecting vulnerable victims to set the local priorities. The table overleaf shows some examples of volume of selected crime types as recorded using the Home Office Counting rules<sup>10</sup> per district. These do not take into account population size and are included as an indication of local crime levels only. The data is for 12 months covering the period April 2012 to March 2013.

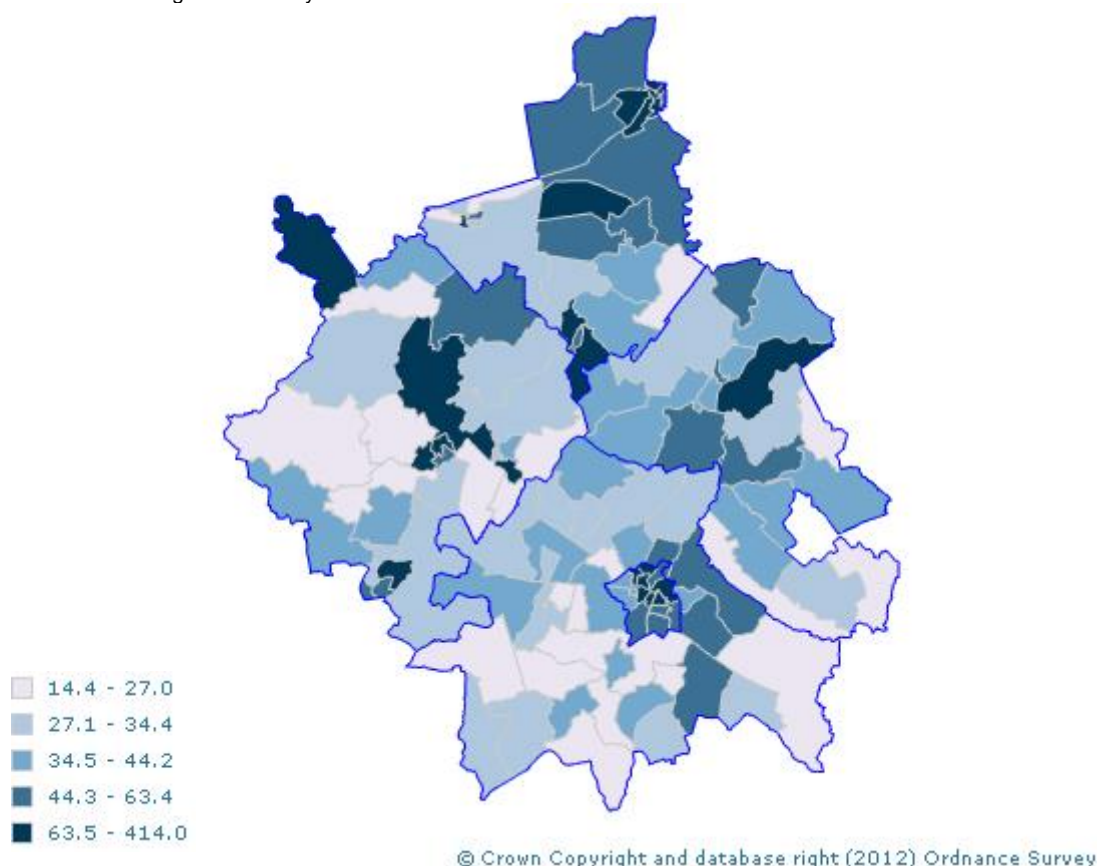
<sup>9</sup> Home Office performance tool iQuanta compares 'most similar' Community Safety Partnerships' trends and performance in police recorded crime.

<sup>10</sup> Rules guiding the recording of crimes as set out by the Home Office

<http://webarchive.nationalarchives.gov.uk/20110218135832/http://rds.homeoffice.gov.uk/rds/countrules.html>

**Map 4: Total crime rate per 1,000 resident population of Cambridgeshire wards (financial year 2011/12, showing quantile rate categories)**

Source: Cambridgeshire County Council – Research and Performance Team



**Table 18: Selected crime by district as recorded for 2012/13 financial year**

Source: Cambridgeshire County Council – Research and Performance

Selected Crime Types	Cambridge	East Cambs	Fenland	Huntingdonshire	South Cambs	Cambridgeshire
All Crime	10,735	2,877	5,186	7,259	4,683	30,740
Serious Acquisitive Crime	1,079	576	758	1,431	967	4,811
Burglary Dwelling	350	245	298	583	385	1,861
All Robbery	82	4	47	38	17	188
Vehicle Crime	647	327	413	810	565	2,762
All Violent Crime	1,722	482	1,139	1,312	775	5,430
Criminal Damage	1,065	372	1,017	1,149	668	4,271
All Fraud (incl Action Fraud)	242	99	146	279	209	975
Action Fraud	167	55	90	149	90	551
Fraud (excl Action Fraud)	75	44	56	130	119	424
Making off without payment	65	43	55	130	119	412
Possession of articles for use in fraud	10	1	1	0	0	12
Forgery	15	6	2	5	3	31
All Theft and Handling	6,061	1,127	1,899	2,878	1,730	13,695
Shoplifting	1,131	255	541	603	157	2,687
Theft from the Person	503	24	40	75	23	665
Theft in a Dwelling	148	42	107	103	54	454
Theft of Pedal Cycles	2,117	65	159	271	255	2,867
Other Classified Thefts & Handling	1,486	382	623	982	661	4,134
Vehicle Interference	29	32	16	34	15	126

Categories in white constitute a breakdown of the category in grey immediately above it.

Further information about the patterns of crime and disorder for the Cambridgeshire districts is available within the district Community Safety Strategic Assessments.<sup>11</sup>

<sup>11</sup> <http://www.cambridgeshireinsight.org.uk/communitysafety>