Defining our market area

Interest and relevance

- The chapter is part of our SHMA as it sets out how we define our housing market area, and the links between the area covered by our seven districts and between neighbouring areas.

Headline messages

- Chapter 1 *Introduction and background* outlines our commitment to working together across seven districts to strategically assess our housing market.
- This chapter sets out information to support the definition of our housing market, following the latest draft CLG guidance, released in September 2013.
- The headline message for the Cambridge housing sub-region is that strong partnership working continues to support our relationship with neighbouring districts, housing market areas, travel to work areas, broad rental market areas and the Local Enterprise Partnership area. Planning functions are administered according to district boundaries, so there are some reasons to continue to work within these administrative areas, while acknowledging that people move across boundaries when finding a place to live, and when commuting to and from home, schools, facilities, carers and family / support networks.
- This chapter highlights some of boundaries most relevant to the CLG guidance and strengthens our commitment to work as a housing sub-region with all partners to identify and tackle housing issues.

Changes over time

- Since our last SHMA update, the DCLG National Policy Planning Framework (March 2012) and National Planning Practice Guidance: Assessment of housing and economic development needs (draft September 2013) have been published. The Assessment of housing and economic needs guidance is key guidance for the SHMA and sets out ways to define Housing Market Areas, which are similar to the factors we have used in the past.

Geographical variation

- This chapter sets some context for geographical comparisons used later in other chapters of the SHMA.

Future monitoring points

- Future SHMA updates will incorporate changes following Census 2011 results, which may affect some data used in this chapter. In particular, it is not possible to identify Travel to Work Areas until travel to work data from the 2011 Census is released, which is due in March 2014.
- Changes to Government policy have affected definitions of market areas, especially through broad rental market area and will monitoring to assess the effects of these broad areas in relation to affordability and rent setting by social landlords in future. More detail is included in Chapter 10 *Incomes and affordability*.

SHMA contents

Please visit http://www.cambridgeshireinsight.org.uk/housing/shma/shma-current-version to read other SHMA 2013 chapters

2 Defining our housing market area

2.1 Introduction

- The Cambridge housing sub-region is made up of seven districts working in partnership to create and update our SHMA.
- However, housing markets and economic forces are no respecters of administrative boundaries, so it is important we are aware of and acknowledge different forces acting upon our residents, and on our neighbours' residents, in terms of housing and related issues.
- New draft CLG guidance provides suggested factors we should use to define a housing market area. These are:
    - House prices and rates of change of house prices.
    - Household migration and search patterns.
    - Contextual data such as travel to work area boundaries, retail and school catchment areas.
- In response to the draft guidance in this chapter we provide
    - Data on property prices, affordability ratios and changes in prices over time.
    - Data on migration based on our New Development Survey results.
    - Maps showing our Travel to Work Areas and travel infrastructure.
- The 2010 CLG "Geography of housing market areas" set out national boundaries for housing market areas. The Cambridge SHMA partnership continues to work on the basis of its seven local authority areas which cover most of two housing market areas identified by CURDS, which they call "Cambridge" and "St Edmunds" - and a small section of "Peterborough" housing market area.
- The previous SHMA published in 2012, Chapter 2 *Defining our market area* contains maps and a summary of the CURDS-defined SHMA areas. At the time of writing, there is no intention to update the CURDS "Geography of housing market areas" using 2011 Census data, so the maps are not repeated in this update but are available via the link above.
- Some of the data in this chapter comes from the 2001 Census. This will be refreshed when more detailed results become available. In particular, the 2011 Census travel to work data is due for release in March 2014. This data is used in "residence of the workplace population" maps and in commuting flows.
- Definitions of terms are set out in Section 2.4.2.

Section 2.2 Facts and figures

2.2 Facts and figures

Chapter 1 *Introduction and background* includes maps showing the seven districts in our housing sub-region. Draft CLG guidance on assessment of housing and economic needs, published September 2013, states:

> *Local planning authorities should assess their development needs working with the other local authorities in the relevant housing market area or functional economic market area in line with the duty to cooperate. This is because such needs are rarely constrained precisely by local authority administrative boundaries.*

The draft guidance identifies three ways to define housing market areas, these are:

- House prices and rates of change of house prices.
- Household migration and search patterns.
- Contextual data such as travel to work area boundaries, retail and school catchment areas.

In this chapter, we take each of the three areas in turn. Some further context is included in section 2.4.4.

2.1.1 House prices and rates of change of house prices

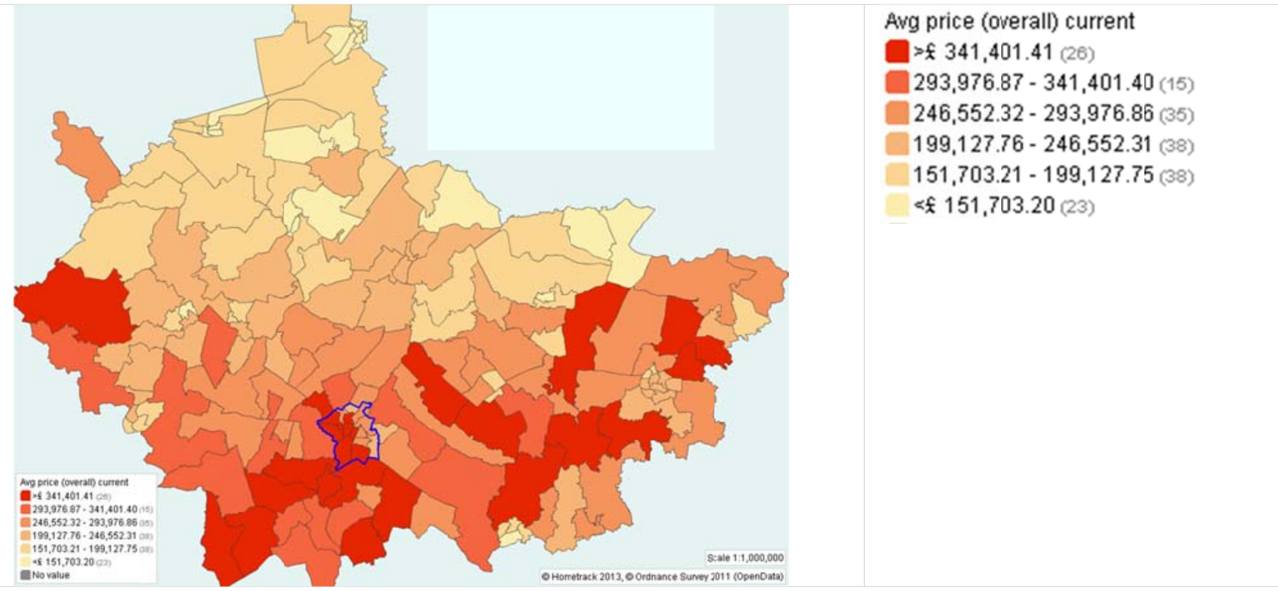
The draft CLG guidance suggests house prices and change of house prices as ways to define a market area.

These issues are covered in more detail in Chapter 5 *Property purchase* and Chapter 10 *Incomes and affordability* and are monitored in our quarterly Housing Market Bulletin, which is available at www.cambridgeshireinsight.org.uk/housing.

All price data below uses Hometrack's Automated Valuation Model.

House prices

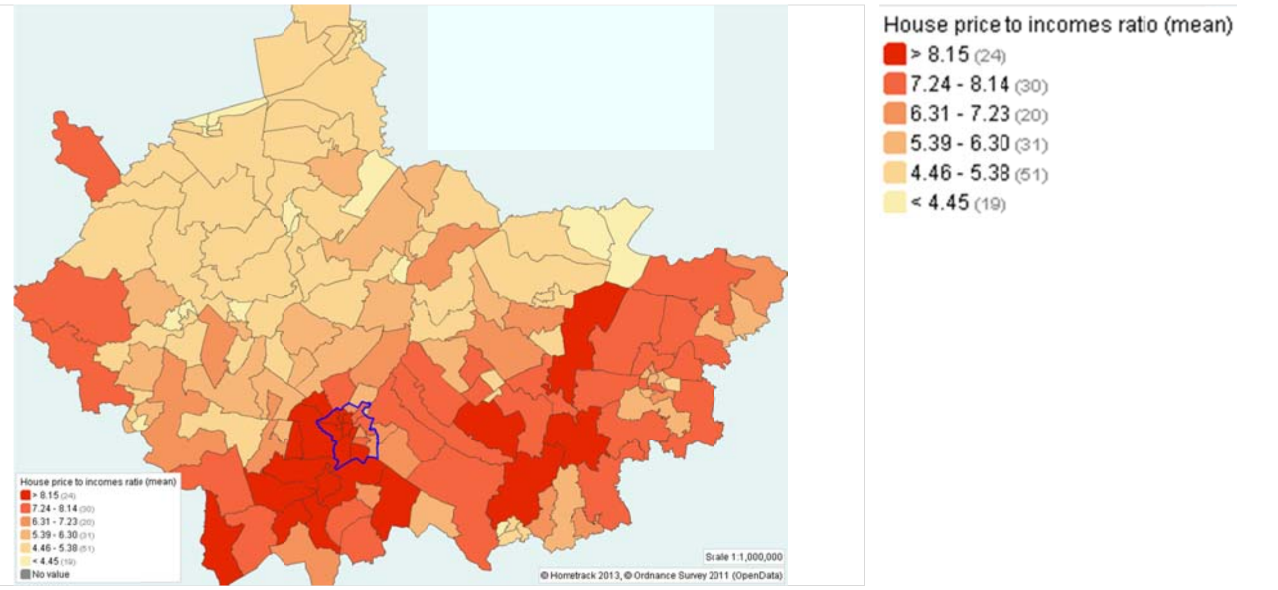
Map 1 **Average house prices, by ward**



Source: Hometrack, via HMB edition 17, published July 2013

Section 2.2 Facts and figures

Map 2 **Mean house price to income ratio, by ward**



Source: Hometrack, via HMB edition 17, published July 2013

Map 1 and Map 2 illustrate that the average house price and the mean house price to mean income ratio may vary across the sub-region, but in a way which is consistent with it being defined as a housing market area.

Both maps demonstrate a continuum, meaning a gradual change from higher prices in the south of the sub-region to lower prices in the north and similarly from higher price to income ratios in the south to lower price to income ratios in the north.

Change in house prices, district-wide

Table 1 **Percentage change in property price over the past four years, district-wide**

	Change over past year	Change over past 2 years	Change over past 3 years	Change over past 4 years
Cambridge	+ 4.9%	+ 13.9%	+ 11.4%	+ 19.4%
East Cambridgeshire	+ 11.5%	+ 10.5%	+ 6.5%	+ 14.3%
Fenland	+ 2.2%	+ 4.6%	+ 0.7%	+ 4.2%
Huntingdonshire	+ 4.7%	+ 6.9%	+ 2.9%	+ 11.7%
South Cambridgeshire	+ 2.7%	+ 3.5%	+ 3.3%	+ 8.2%
Forest Heath	+ 2.1%	+ 2.7%	- 8.1%	+ 13.5%
St Edmundsbury	+ 3.1%	- 1.4%	+ 3.4%	+ 15.2%
Note: comparing data from Dec 12 to Nov 13 with…	Jul 12 to Jun 13	Jul 11 to Jun 12	Jul 10 to Jun 11	Jul 09 to Jun 10

Source: Hometrack downloaded Dec 2013

Table 1 shows that each district has seen a variety of price changes over the past four years. There does not appear to be any "common" pattern between the seven districts. Some districts see increases in prices in all of the four years (such as Cambridge and East Cambridgeshire) while others saw drops (such as Forest Heath and St Edmundsbury) on one of the four years. Fenland, Huntingdonshire and South Cambridgeshire all saw a modest percentage increase over the four-year period.

Section 2.2 Facts and figures

Change in house prices at ward level

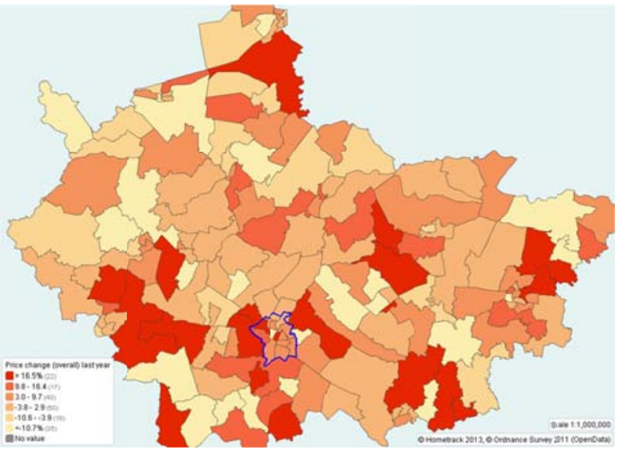
In section 2.4.4, Table 3 is provided showing change in average house prices over time, at district and ward level. Please note the ward-level data uses slightly different dates to the district level data. The data in Table 3 are presented in map format to aid comparison over each time period in question.

These maps show overall price change (overall) over the last year, 2 years, 3 years and 4 years:

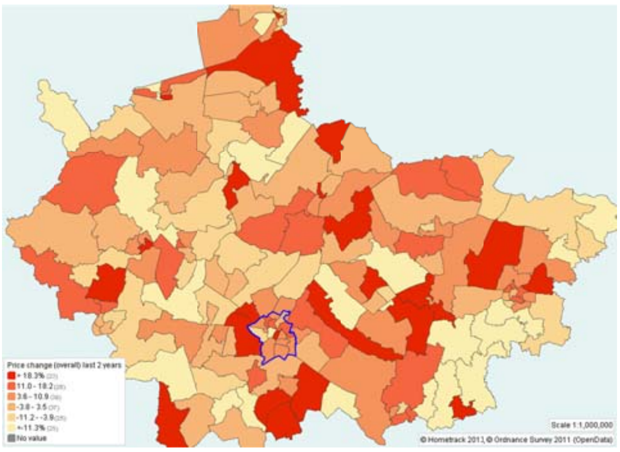
- The past year ward data compares prices from December 2012 to November 2013 compared to April 2012 to Mar 2013.
- The past 2 years comparison uses prices from December 2012 to November 2013 compared to April 2011 to Mar 2012.
- The past 3 years comparison uses prices from December 2012 to November 2013 compared to April 10 to Mar 11.
- The past 4 years comparison uses prices from December 2012 to November 2013 and compares to Apr 2009 to Mar 2010.

Map 3 **Change in prices over the past four years, housing sub-region**

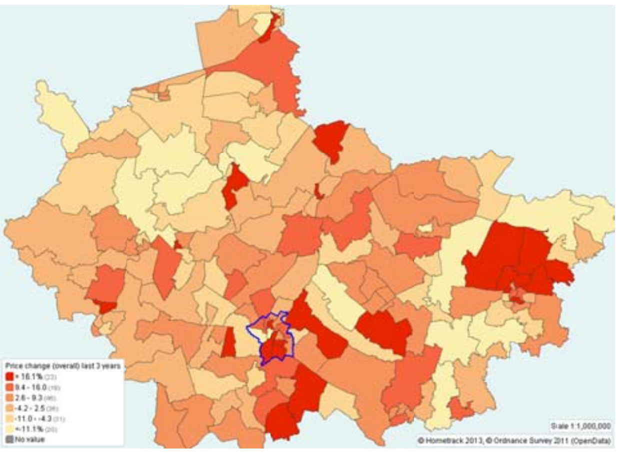
Change in property prices, past year



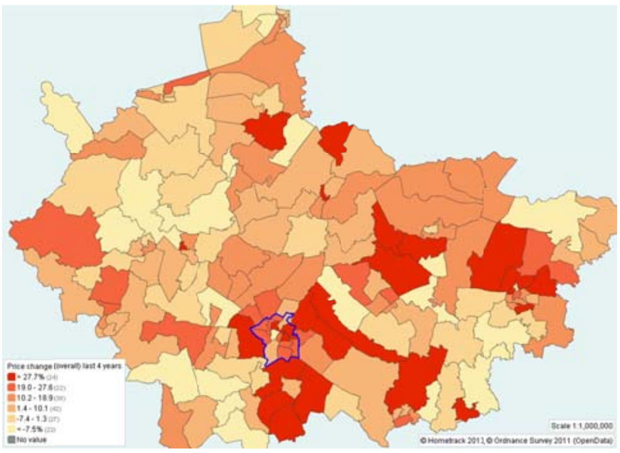
Change in property prices, past 2 years



Change in property prices, past 3 years



Change in property prices, past 4 years



Source: Hometrack downloaded Dec 2013, last updated by Hometrack November 2013

Section 2.2 Facts and figures

"Change in price" maps do not show such a neat pattern as average price, and median affordability ratio maps, which demonstrated a fairly clear north/south split across the middle of the housing sub-region.

Price change maps show a varied picture geographically and reflect the variety of prices and the different changes in price trends across our housing sub-region.

2.1.2 Household migration and search patterns

The draft CLG guidance on housing market assessment suggests household migration and search patterns as ways of defining a housing market area.

In this section we look at seven new development surveys undertaken locally, to help define our housing market area.

We will look to new 2011 Census data to update our understanding of migration patterns as more detailed results become available in 2014.

Data from seven "new development surveys" across the housing sub-region

Since 2006 districts in our sub-region have been carrying out postal surveys of new housing developments, to identify some of the factors affecting peoples' choices when they move to a new homes; particularly a new home on a new development site.

Seven such surveys have now been completed, one in each district, which enable us to learn about the choices made by many new residents living in our housing sub-region. Although the number of surveys sent out and response rates have varied, there are now 2,800 responses in total to analyse; a sample size considered large enough to obtain statistically robust results.

For comparison, to survey the population of Cambridgeshire a sample of 1,100 is usually taken. These 1,100 responses give a 'survey error' of plus or minus 3% at the 95% confidence level. So if all 1,100 people answer a yes/no question and 50% of people answer 'yes' then we can be 95% certain that if we surveyed the entire population of Cambridgeshire, the proportion who would answer 'yes' to the question would be between 47% and 53%.

Amalgamating the results of these seven surveys is useful, though it should also be noted the surveys were conducted separately over a seven year period as set out in Table 2.

Table 2 **New development surveys and response rates**

Survey of	Year of survey	Number of surveys sent out	Number of responses received	% response rate
Cambourne (SCDC)	2006	2,012	816	41%
Huntingdonshire	2007	1,710	702	41%
East Cambridgeshire	2010	1,473	462	31%
Fenland	2010	851	169	20%
St Edmundsbury	2011	900	300	33%
Red Lodge (Forest Heath)	2012	1,850	244	13%
Cambridge	2012	447	107	24%
Total		**9,243**	**2,800**	**30%**

Source: New Development Surveys, see http://www.cambridgeshireinsight.org.uk/housing/new-development-surveys

Section 2.2 Facts and figures

Among other issues, the surveys asked about:

- The region people moved form and to, to live on the new housing development.
- The distance people moved to live on the new housing development.
- Reason(s) for moving.
- Changing tenure – or not.
- Plans to stay.
- Place of work.
- Distance travelled to work.

The results are summarised below. This information is provided to test and compare to other data in this chapter and to start to assess whether the choices of people moving on to new housing developments are similar to the choices made by other home movers.

Overall, by comparing results of the seven surveys, we can conclude that:

- Some 45% of moves onto the seven new housing developments surveyed were made within the same district and 17% of moves were made within the relevant county (that is, Cambridgeshire or Suffolk). Only 3% of movers were from outside the UK.
- Excluding the new settlements of Cambourne and Red Lodge, the overall pattern of moves were
  - 52% within the "host" district
  - 13% within the same county
  - 28% within the East of England
  - 19% outside the East of England (but within the UK) and
  - 2% from overseas.
- Cambourne and Red Lodge saw higher proportions of residents moving from further away, though the largest proportion (41%) moved from elsewhere in the East of England.
- In terms of distances people moved to live on the new housing developments; 59% of moves were of less than 20km and 41% moved more than 20km.
- The top reason for moving to a new housing development was to find a larger or smaller home, representing a quarter (24%) of responses overall. "Setting up own home" was the second most common reason at 18% of all responses. The third most common reason was to be nearer job / new job, representing 14% of responses.
- Changing tenure – or not. Of the 2,701 movers who specified the tenure they lived in before ("from") and their current tenure ("to") over the seven surveys;
  - A total of 1,629 respondents stayed with the same tenure as before (60%).
  - 1,072 respondents (40%) changed tenure when they moved to the new home.

Section 2.2 Facts and figures

- The largest proportion of "tenure movers" changed between private renting and owner occupation, with 310 households (11%) moving from private rented to owner occupation and 100 households (4%) moving from owner occupation to private rented.

- A large proportion (37%) of respondents who answered the question about their plans to stay, had plans settle for more than 5 years on that development. Only 13% planned to stay for less than 12 months.
- The highest proportion of respondents in each survey live and worked in the "host" district:
  - In Cambourne, 35% of respondents both live and work in South Cambridgeshire, closely followed by 28% who work in Cambridge. A higher proportion of Cambourne residents work further from home than other survey respondents.
  - In East Cambridgeshire, 32% of respondents live and work within the district while 29% work in Cambridge. An unusually low proportion of East Cambridgeshire residents work further afield (i.e. outside the sub housing region).
  - In Fenland, 56% of respondents live and work within the district. Peterborough is the second most common work location, at 11%.
  - In St Edmundsbury, 45% of respondents live and work within the district. Cambridge was the workplace for 16% of respondents. St Edmundsbury shows the highest proportion of residents travelling elsewhere in the UK to work, at 12%.
  - In Forest Heath, 38% of respondents live and work within the district. Cambridge City (18%) and St Edmundsbury (17%) are the other main areas of employment for residents of Red Lodge, Forest Heath.
  - In Cambridge, 67% of respondents live and work within the district with a further 21% in South Cambridgeshire.
- New development residents travel to work patterns:
  - 926 respondents (27%) travel between 10km and 20km to get to work
  - 544 respondents (16%) travel between 20km and 30km to get to work
  - 551 respondents (16%) travel less than 2km to get to work.
- The new development surveys ask respondents how far they moved, to live on that new housing development. This is useful in terms of the draft CLG guidance which guides us to consider migration patterns.
- Other data on migration is also being investigated, to build our understanding of where people move from and to, in relation to our housing sub-region; the reasons for these move and any issues which prevent or restrain such moves.

Map 4 shows selected new development survey sites with a 20km radius circle drawn around each one. The 20km circles around each new development site represent the 59% of households who moved into new developments from 20km away or less. The circles demonstrate that a large proportion of new

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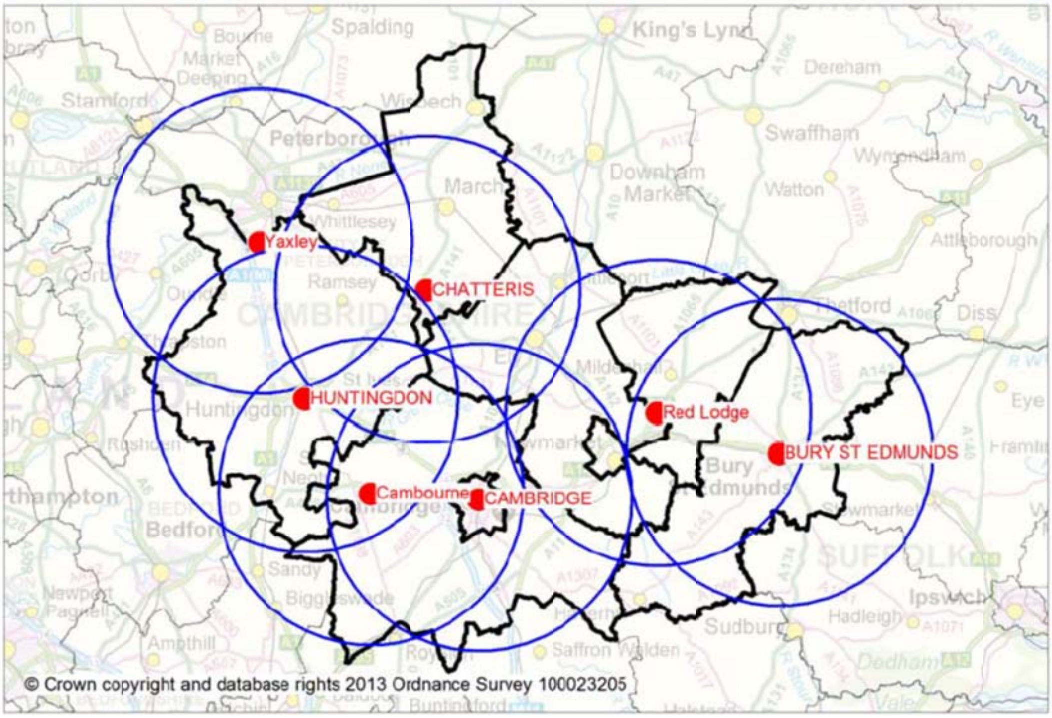
development residents can only have moved in from within the Cambridge sub-Region, whether from the same or a different district.

Map 4 **New development surveys: 20km radii around selected survey sites**



Source: CCCRG, December 2013

Map 4 tests the limits of the Cambridge sub-Region as a Housing Market Area by including surveys on the edge of the sub-Region such as Yaxley where at least half of the area within the 20km boundary falls within the Cambridge housing sub-region with most of the rest in Peterborough and Northamptonshire, and such as Bury St Edmunds where nearly a quarter of the area within the 20km boundary falls outside the Cambridge housing sub-region. Other survey sites such as Cambourne, Chatteris, Huntingdon and Red Lodge are almost totally within the Cambridge sub-Region and include parts of more than one district. For example, the 20km boundary around Red Lodge covers large parts of Forest Heath, St Edmundsbury and East Cambridgeshire along with some of South Cambridgeshire.

The full report and the individual surveys are all available at http://www.cambridgeshireinsight.org.uk/housing/new-development-surveys

2.1.3 Contextual data

Finally, the draft CLG guidance suggests the following as "contextual data":

- Travel to work area boundaries.
- Retail catchment areas.
- School catchment areas.

Section 2.2 Facts and figures

Travel to work areas

We await detailed results and analysis of the 2011 Census results, to inform our thinking on travel to work areas, which we understand will be produced in Spring 2014. In the meantime, the TTWAs relevant to the Cambridge housing sub-region are outlined here. Once the 2011 updates are available they will be shared, and compared to the 2001 based areas, to see whether and how commuting patterns have changed over the past ten years.

For those involved in labour market analysis and planning, it is useful to be able to identify labour market areas. These zones, known as travel to work areas, are defined so the bulk of the resident population also works in the same area. This requires the analysis of commuting patterns which the Office for National Statistics (ONS) has worked with Newcastle University on, applying a complex process to define a national set of Travel to Work Areas (or TTWAs).

The fundamental criterion is that, of the resident economically active population, at least 75% actually work in the area, and also, that of everyone working in the area, at least 75% actually live in the area. The resulting pattern is that, although the definitive minimum working population in a Travel to Work Area is 3,500, many are much larger - indeed, the whole of London and surrounding area forms one Travel to Work Area. Some 243 Travel to Work Areas were defined in 2007 using 2001 Census information on home and work addresses. For comparison, in 1991 there were 314 Travel to Work Areas and in 1981, 334.[1]

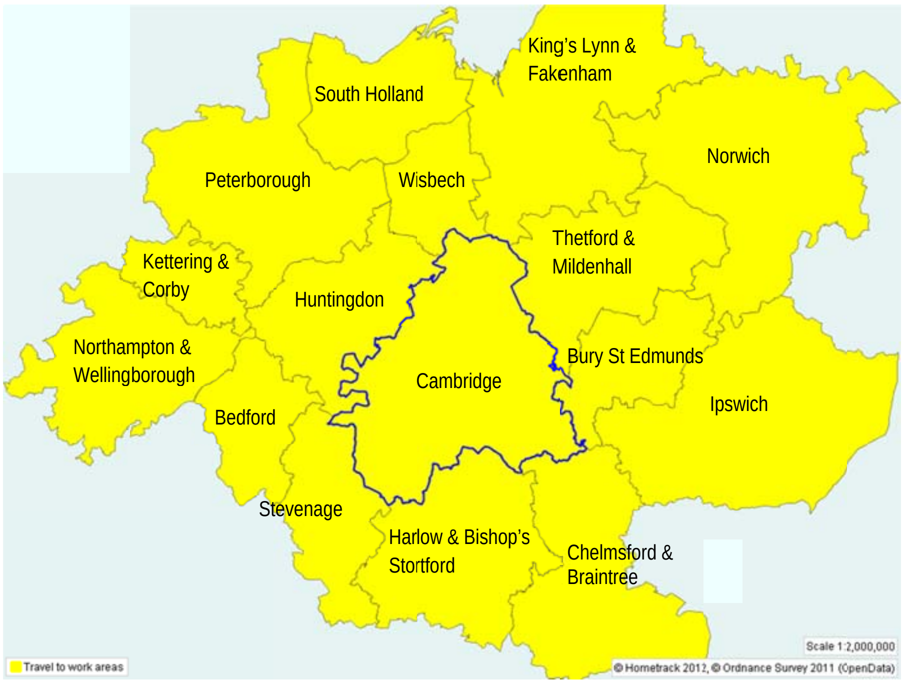
Map 5 **Map of local TTWAs taken from Hometrack (with OS background)**

Source: Hometrack (blue line denotes boundary of Cambridge TTWA. Other TTWA areas boundaries shown with grey lines)

[1] *Source of this text: http://www.statistics.gov.uk/geography/beginners_guide.asp*

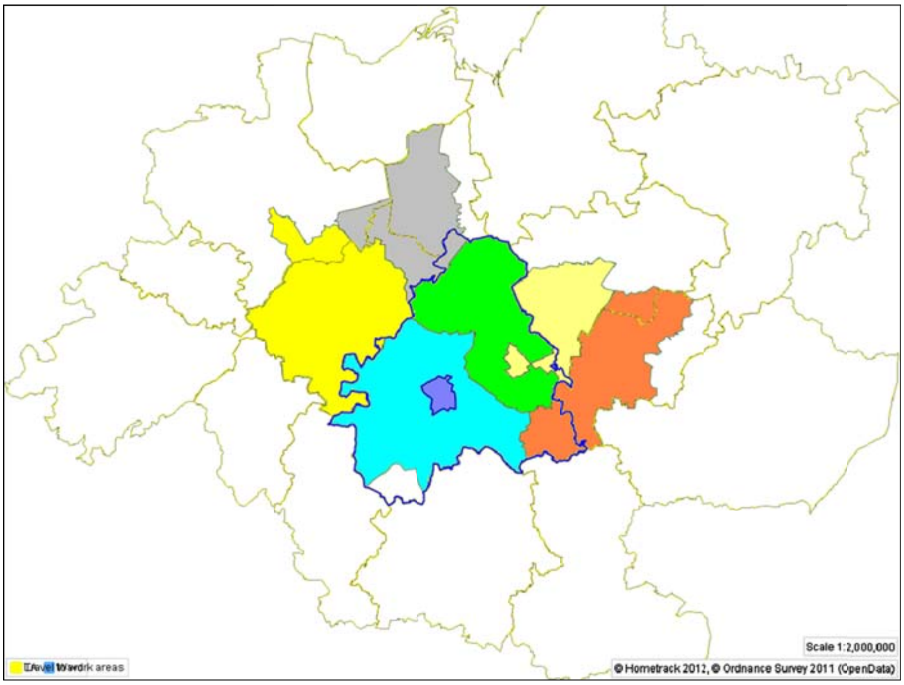
Section 2.2 Facts and figures

Map 6 **Map of local TTWAs with area names and no background**



Source: Hometrack (blue line denotes boundary of Cambridge TTWA. Other TTWA areas boundaries shown with grey lines)

Map 7 **TTWAs compared to district boundaries** (Cambridge TTWA boundary in blue, others grey)



Comparing Map 6 and Map 7 shows that almost all of our seven districts in our housing sub-region fall into the following travel to work areas: Cambridge; Huntingdon; Wisbech; Thetford and Mildenhall; and Bury St Edmunds.

There is a slight overlap of Huntingdon and Fenland districts into Peterborough's TTWA.

Section 2.2 Facts and figures

Our travel network

The local travel network illustrates the main possibilities for commuting, and impacts on housing, the economy and various other issues affecting our market area.

Map 8 shows the travel network across Greater Cambridge – Greater Peterborough LEP area

Map 8 **Greater Cambridge–Greater Peterborough LEP area showing travel network**

Source: Hometrack

There are four main rail links in the area:

- East Coast main line connecting Peterborough, Huntingdon and St Neots with London and the North.
- King's Lynn to London line connecting Littleport, Ely and Cambridge to London.
- Peterborough to Ely line connecting Cambridge, Ely, March and Whittlesey to Peterborough and the East Coast main line.
- Bury St Edmunds heading west to Ely or Cambridge and other lines to the west; and heading east to Stowmarket, Ipswich and Felixstowe.

In addition there are connections which may result in commuting out of the LEP area, notably:

- Bury St Edmunds to Ely or Cambridge heading east to Stowmarket, Ipswich and Felixstowe.
- The Cambridge and Ely line to Norwich.

The main road links are:

- The A1 and A1(M), connecting Peterborough, Huntingdon and St Neots to the north and to London.
- The A47, connecting Peterborough, Wisbech and King's Lynn then on to Norwich.

Section 2.2 Facts and figures

- The A14, connecting Huntingdon, St Ives, Cambridge, Newmarket and Bury St Edmunds with the motorway network to the west and Ipswich and Felixstowe to the east along with London via the M11.
- The M11, connecting the A14 and Cambridge to London.

In addition there are important local routes connecting the market towns with each other and with the main routes, such as the A11 connecting Mildenhall to the A14, and the A10 connecting East Cambridgeshire and Fenland.

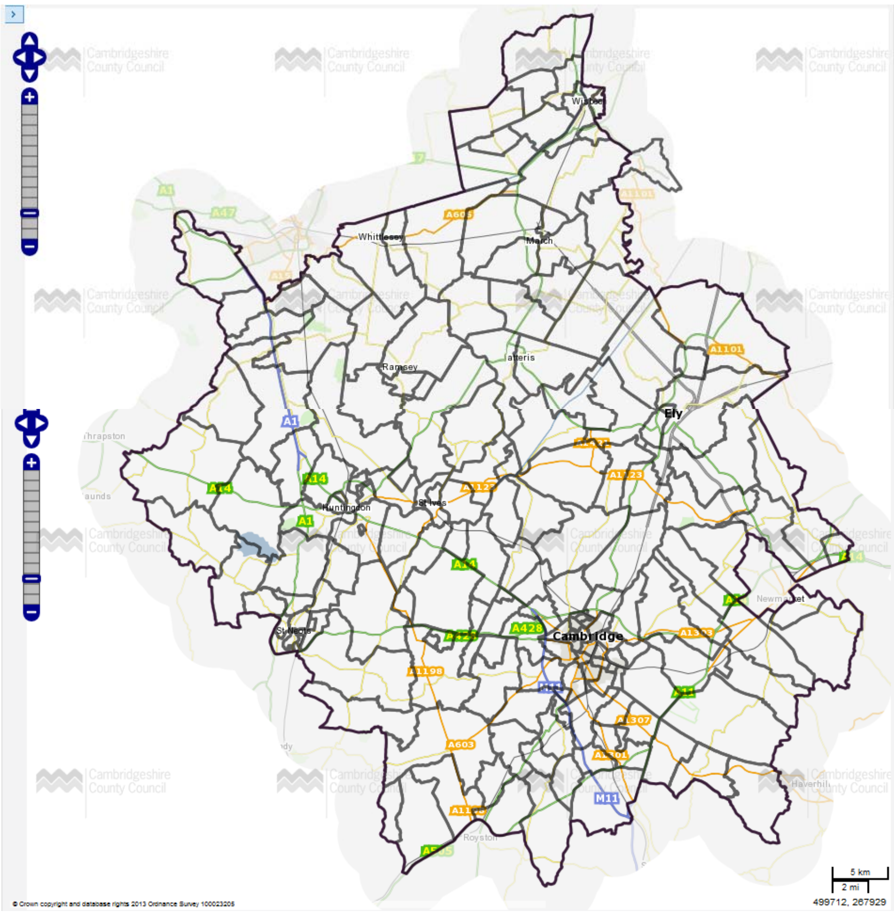
Retail catchment areas

Mapping of retail catchment areas will be linked in to defining our market area in the future, through joint work with economic assessment and mapping teams for Cambridgeshire and Suffolk partners.

School catchment areas

School catchment boundaries for Cambridgeshire are provided on a web site called "Your Cambridgeshire". Thumbnails of catchment area boundaries are provided here as a first step to building this information into our understanding of other influences on housing market, in Map 9 and Map 10.

Map 9 **Cambridgeshire school catchments: primary**



Source: "Your Cambridgeshire" at http://my.cambridgeshire.gov.uk/?tab=maps

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Map 10 **Cambridgeshire school catchments: secondary**

Source: "Your Cambridgeshire" at http://my.cambridgeshire.gov.uk/?tab=maps

Unfortunately at the time of drafting this chapter, Suffolk school catchment areas could only be found in a list format, not as maps. Maps of Suffolk school catchment areas relevant to St Edmundsbury and Forest Heath will be added as they become available.

A note about district profiles

Further information on the individual seven districts is included in SHMA 2012, chapter 2 (please see http://www.cambridgeshireinsight.org.uk/housing/previous-versions).

This refers to Census 2001 data which is due to be updated in 2014, so is not reproduced here. Rather, we plan to show the change between Census 2001 and Census 2011 when new has been published and analysed. However thumbnails of the maps presented in the previous chapter are included in section 2.4.4 to outline the work – live patterns across our wider area.

Further additional contextual information is provided in section 2.4.4 including our Broad Rental Market Areas and LEP geography. These are not referred to in the new draft CLG guidance, however as they provide local insight and are the basis for other data collection, they are included in the "additional information" as further context for our sub-regional market area.

2.3 Analysis

Current situation

- Overall, the grouping of seven districts to form a housing sub-region reflects many factors which are used to define housing markets.
- The groups of authorities has a strong working partnership, as well as sharing market, migration and commuting flows as shown in our new development surveys.
- Although some boundaries cut across our sub-regional area such as BRMAs, this does not significantly impact on the issues we face and our approach to assessing the strategic needs of our housing market.
- We continue to extend partnership working beyond our "seven district" area to learn about our more distant neighbours. Working with a wider group of neighbours helps add to our understanding of housing and economic markets and changes over time, though we are keen not to over-extend the area we use to assess our housing market in the SHMA.

Changes over time

- New CLG guidance is still being absorbed. Our SHMA works on the principle of learning and evolving, building up data as and when it becomes relevant and necessary, and to do this we plan to further develop our understanding of our housing market area, and the forces at work within it, in future.

Changes over area

- The new CLG guidance emphasises certain factors to be taken into account in defining a market area. We continue to work with our partners surrounding our sub-region and to share information and approaches to housing markets across boundaries.

What does all this data, combined, tell us?

- Our housing sub-region benefits from a strong partnership approach, demonstrated in our Memorandum of Cooperation and our continuing partnership approach to the SHMA and other housing and planning issues.
- Within any group of districts there will be a variety of market forces and factors at play, and very rarely will all wards or districts experience the same forces or impacts as each other.
- Within this context, our SHMA seeks to bring together and help compare data; setting out objective evidence in a consistent and accessible way, to help us better understand housing markets and changes to them.

2.4 Background information

2.4.1 Links and references

Correct at November 2013

DCLG **The geography of housing market areas in England: full report** 2010, retrieved 3 Jan 2012 http://www.communities.gov.uk/documents/housing/pdf/1775475.pdf

DCLG **National Policy Planning Framework** 2012, retrieved 14 November 2013 http://planningguidance.planningportal.gov.uk/wp-content/themes/planning-guidance/assets/NPPF.pdf

DCLG **Assessment of housing and economic development needs, draft guidance 2013** retrieved 14 Nov 2013 http://planningguidance.planningportal.gov.uk/blog/guidance/assessment-of-housing-and-economic-development-needs/what-is-the-purpose-of-the-assessment-of-housing-and-economic-development-needs-guidance/

CCCRG **New Development Survey reports** 2013 http://www.cambridgeshireinsight.org.uk/housing/new-development-surveys

CRHB (quarterly) **Housing market bulletin** http://www.cambridgeshireinsight.org.uk/Housingmarketbulletin

Section 2.4 Background information

2.4.2 Definition of terms

Term used	Abbreviation	Meaning, source or link to relevant website
Travel to work area	TTWA	Of the resident economically active population, at least 75% work in the area AND Of everyone working in the area, at least 75% actually live in the area. http://www.statistics.gov.uk/geography/beginners_guide.asp
Broad rental market area	BRMA	An area "within which a person could reasonably be expected to live having regard to facilities and services for the purposes of health, education, recreation, personal banking and shopping, taking account of the distance of travel, by public and private transport, to and from those facilities and services". A BRMA must contain "residential premises of a variety of types, including such premises held on a variety of tenures", plus "sufficient privately rented residential premises, to ensure that, in the rent officer's opinion, the LHA for the area is representative of the rents that a landlord might reasonably be expected to obtain in that area". http://www.voa.gov.uk/corporate/_downloads/pdf/Cambridge.pdf
Valuation Office Agency	VOA	The government agency responsible for valuations relating to local housing allowances, amongst other issues. www.voa.gov.uk
Local Enterprise Partnership	LEP	The Greater Cambridge Greater Peterborough Enterprise Partnership is focused on helping to drive forward sustainable economic growth in our area – with local business, education providers, the third sector and the public sector working together to achieve this. Has a business-led Board in place, alongside a small core team. The goal is "to create an economy with 100,000 major businesses and create 160,000 new jobs by 2025, in an internationally significant low carbon, knowledge-based economy balanced wherever possible with advanced manufacturing and services." http://www.yourlocalenterprisepartnership.co.uk
Centre for Urban and Regional Development Studies	CURDS	The Centre for Urban and Regional Development Studies, based at Newcastle University http://www.ncl.ac.uk/curds/

Section 2.4 Background information

2.4.3 Data issues

Main sources of data

- Detailed Census 2011 results are needed to update aspects of this chapter in future updates to the SHMA. In the meantime we continue to use data from 2001, and to incorporate Census 2011 data wherever feasible, and specifically in Chapter 12, *Forecasts for homes of all tenures*.

Recent changes to data

- Two further new development surveys were completed in 2013 and reports published.
- New report bringing together the seven completed surveys was completed and published in 2013.
- Census 2011 results published in 2013, with further detail to follow.

Planned changes to data

- New Travel to Works Area definitions to be produced nationally in 2014.

Section 2.4 Background information

2.4.4 Additional information

Broad Rental Market Areas (BRMAs)

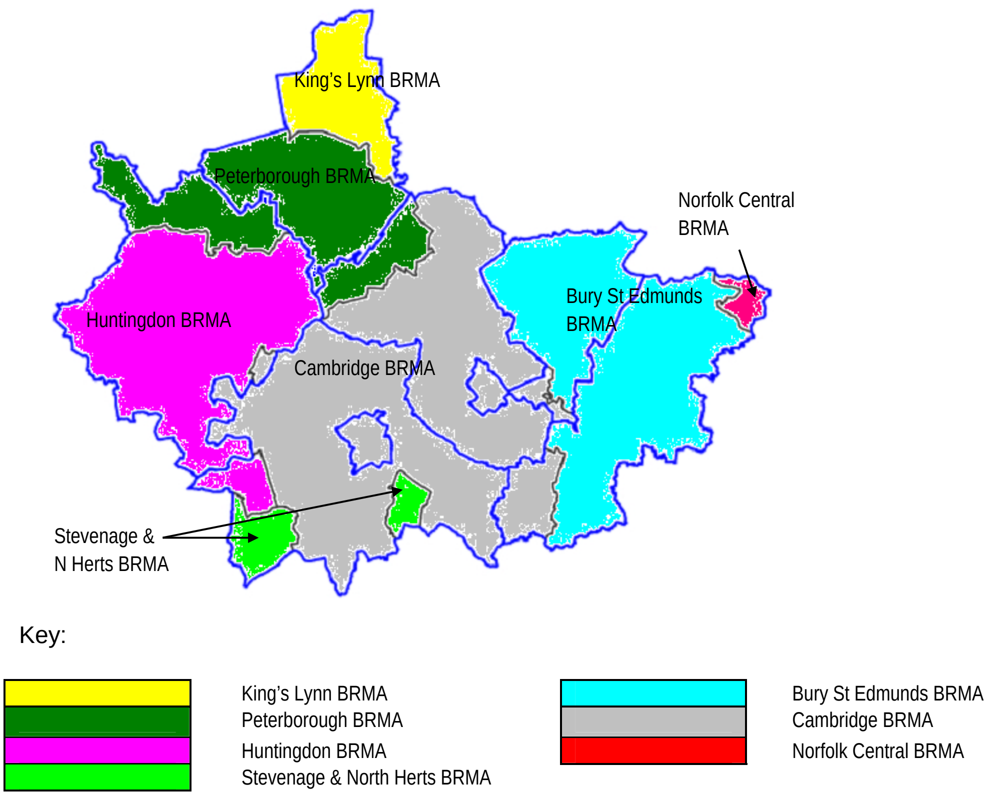
BRMAs are used to set representative rents for Local Housing Allowance rates. A BRMA is an area "within which a person could reasonably be expected to live having regard to facilities and services for the purposes of health, education, recreation, personal banking and shopping, taking account of the distance of travel, by public and private transport, to and from those facilities and services". A BRMA must contain "residential premises of a variety of types, including such premises held on a variety of tenures", plus "sufficient privately rented residential premises, to ensure that, in the rent officer's opinion, the LHA for the area is representative of the rents that a landlord might reasonably be expected to obtain in that area".

BRMAs identified in this SHMA update were implemented by the Valuation Office Agency (VOA) in July 2009. The geography of BRMAs is not the same as district geographies. Please follow this link to find individual maps of BRMAs, prepared by the Valuation Office Agency in 2009
http://www.voa.gov.uk/corporate/_downloads/pdf/Cambridge.pdf

Map 11 provides a comparison of district boundaries and BRMA boundaries, where they impinge on the local authorities within the Cambridge housing sub-region. District boundaries are highlighted in blue.

Map 11 **Comparing district and Broad Rental Market Area boundaries**

Broad Rental Market Areas are shown with black boundaries and bright shading as per the key, names of BRMAs are provided in black text. District boundaries are shown with thick blue lines.



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The Greater Cambridge–Greater Peterborough Local Enterprise Partnership (LEP)

The Greater Cambridge–Greater Peterborough Enterprise Partnership was given the green light by Government in October 2010, following the submission of a bid in September 2010.

The LEP has been created to help drive forward sustainable economic growth in our area – with local business, education providers, the third sector and the public sector working together to achieve this.

The LEP's goal is to create an economy with 100,000 major businesses and create 160,000 new jobs by 2025, in an internationally significant low carbon, knowledge-based economy balanced wherever possible with advanced manufacturing and services.

Strategic areas of focus are:

- Skills and employment
- Strategic economic vision, infrastructure, housing and planning
- Economic development and support for high growth business
- Funding, including EU funding, regional growth funding and private sector funding.

The GC-GP LEP area currently has a population of 1.3 million people, which is estimated to grow to 1.5 million by 2031. It hosts a number of globally significant business clusters, world class research capacity linked to our universities, a number of thriving market towns, and is the UK's leader in agriculture, food and drink. The area boasts 700,000 jobs, 60,000 enterprises and generates £30 billion per annum.

Map 12 **Greater Cambridge–Greater Peterborough LEP geography**

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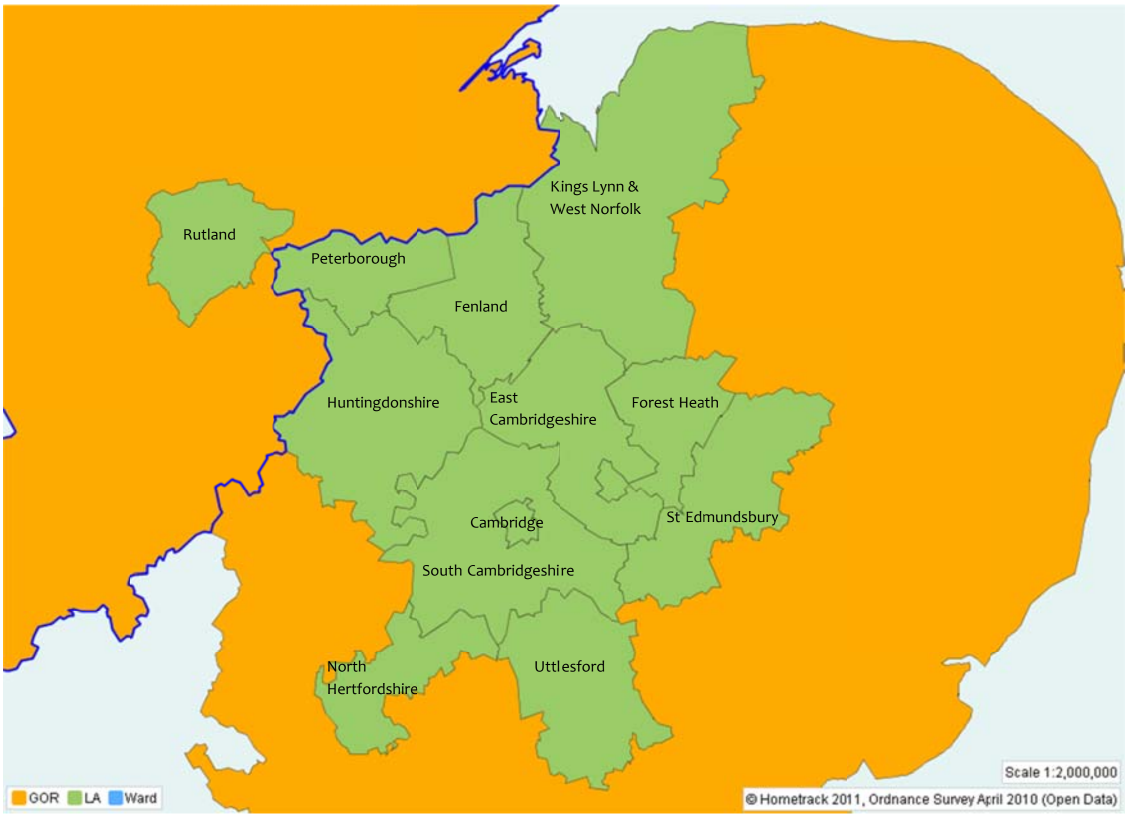
Source: Hometrack

Map 13 **The Greater Cambridge–Greater Peterborough LEP districts**



Source: Hometrack (blue line denotes regional boundary)

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Percentage change in price over past four years

Particularly "high" and "low" values are highlighted in pink and blue respectively (i.e. values more than +20 or less than -20).

Table 3 **% change in price, by district and ward**

District and ward name	Past year	Past 2 years	Past 3 years	Past 4 years
Cambridge				
Abbey	5	15.4	11.4	42.1
Arbury	7.5	13.2	2.9	25.4
Castle	16.6	8.8	2.6	22.9
Cherry Hinton	6.6	9	2	23.7
Coleridge	5.9	9.4	16	19.3
East Chesterton	- 1.4	0.9	9	6.8
King's Hedges	- 0.5	6.5	- 4.9	23.2
Market	- 24.4	- 35.2	23.1	- 28.4
Newnham	9.9	- 4.8	8.5	21.5
Petersfield	18.1	30	- 11.2	23.2
Queen Edith's	5.7	6.2	6.2	27.1
Romsey	3.8	7.9	54.9	28.3
Trumpington	7.5	5.8	18.7	2.6
West Chesterton	3.8	16.8	24.7	40.2
East Cambridgeshire				
Bottisham	5.8	22.2	- 17.6	34.6
Burwell	8.8	6.2	- 22.5	21.1
Cheveley	6.2	24.3	10.7	8.8
Downham Villages	- 6.6	- 1.2	10.4	7.8
Dullingham Villages	- 0.5	9.8	43.6	- 3
Ely East	0	7.8	36.3	11.1
Ely North	- 1.2	0.5	- 2.7	7.6
Ely South	8.1	4.6	8.4	16.2
Ely West	13.7	23.4	10	36.4
Fordham Villages	34.1	- 14.6	8	34.1
Haddenham	11.7	11.1	2.9	9.9
Isleham	19.7	4.4	11.5	48.7
Littleport East	- 5.9	- 2.1	5.3	4.6
Littleport West	6.8	26.4	5.6	39.6
Soham North	13.2	18.7	- 6.2	7.6
Soham South	- 0.4	- 2.9	6.1	1.7
Stretham	0.3	11	4.9	- 0.8
Sutton	6.3	- 2.2	- 4.6	4.6
The Swaffhams	- 26.3	- 47.2	- 4.3	- 50.2
Fenland				
Bassenhally	10.4	11	13.3	20.4
Benwick, Coates and Eastrea	- 12.9	- 2	- 10.7	- 0.1
Birch	- 12.8	- 19.8	- 11.1	15.2
Clarkson	5.3	22.7	1	15.4
Delph	- 6.5	- 12.6	9.2	0.8
Doddington	- 4.6	- 3.9	3.9	8.7
Elm and Christchurch	18.3	20.7	- 3.4	18.2
Hill	0.1	- 4.1	3.1	3.7
Kingsmoor	- 0.3	14.4	2.8	9.5
Kirkgate	- 12.4	- 8.6	- 16.5	- 4.6
Lattersey	- 0.1	18.3	- 8.9	- 3.7
Manea	8.4	- 23.7	5.3	- 14.3
March East	- 10.5	1.9	- 8.5	-1.5
March North	- 6.7	- 3.7	22.5	3.5
March West	11.1	- 3.1	0.8	5.8
Medworth	1.1	3.6	- 6.3	11.2
Parson Drove and Wisbech St. Mary	- 8.9	4	- 9.6	- 1.4
Peckover	- 21.9	- 24.8	1.4	- 46.9
Roman Bank	3.9	1.1	- 38.2	- 9.9

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District and ward name	Past year	Past 2 years	Past 3 years	Past 4 years
St. Andrews	5.9	12.7	7.5	15.4
St. Marys	- 14.3	- 28.7	- 9.2	3
Slade Lode	- 8.1	- 16.5	13.2	- 27.8
Staithe	2.7	3.7	8.3	5.4
The Mills	3.9	- 0.3	0.5	- 8.5
Waterlees	5.8	- 7.6	15.7	- 5.7
Wenneye	14	18.7	- 30.2	16.9
Wimblington	3.8	10.7	- 12.5	31.4
Huntingdonshire				
Alconbury and The Stukeleys	- 12.2	- 2.1	0.7	- 18.5
Brampton	- 0.4	- 7.1	- 6.2	0.5
Buckden	31.7	65.1	- 10.9	26.6
Earith	- 1.8	- 6.4	22.8	0.8
Ellington	- 7.9	- 1.1	- 0.8	27.5
Elton and Folksworth	- 29.4	- 15.7	20.4	- 30
Fenstanton	- 12.8	- 10.8	- 29	- 4.6
Godmanchester	6.6	5.5	- 5.4	1.5
Gransden and The Offords	17	- 11.2	5	7.6
Huntingdon East	9.5	20.2	3.6	14.6
Huntingdon North	3	5.6	14.9	- 2
Huntingdon West	- 6.5	6.6	7.7	9.9
Kimbolton and Staughton	1.2	12.8	8	5.4
Little Paxton	14.2	16	1.8	20.2
Ramsey	4.7	4.4	- 6.3	- 5.2
St. Ives East	-2	6	- 20.8	14.5
St. Ives South	- 3.2	0.3	13.1	8.7
St. Ives West	4.8	11.8	- 5.2	30
St. Neots Eaton Ford	0.5	2.3	2.6	15.7
St. Neots Eaton Socon	- 3.9	2.4	- 5.5	5.4
St. Neots Eynesbury	- 1.8	2.3	3.2	9.2
St. Neots Priory Park	0.6	- 5.2	- 6.3	7.9
Sawtry	4.8	11	- 9.2	- 1.1
Somersham	- 2.7	- 6	2.9	- 14.7
Stilton	- 5.5	6.8	- 2.1	12.9
The Hemingfords	32.2	13.1	- 3.1	1.9
Upwood and The Raveleys	- 11.4	- 12	11.7	- 11
Warboys and Bury	- 1.9	- 3.3	- 9.1	- 2.7
Yaxley and Farcet	- 7.4	- 6.3	20.4	1.7
South Cambridgeshire				
Balsham	- 0.6	7.6	3.3	6.9
Bar Hill	- 4	- 4	3.4	- 9.8
Barton	41.4	39.2	5.8	58.2
Bassingbourn	- 15	1	8.5	6.3
Caldecote	2.7	0.4	- 5.9	13.3
Comberton	6.8	- 3.3	- 1.4	6.7
Cottenham	- 0.2	- 9.4	- 11.8	12.4
Duxford	27.2	32.2	17	35.9
Fowlmere and Foxton	- 34	- 12	1.5	6
Fulbourn	4.7	- 0.2	20.3	18
Gamlingay	- 13.8	- 16.2	3.8	- 15.9
Girton	17.2	25.6	8.7	20.8
Hardwick	- 6.3	4.7	- 2.8	- 7.1
Harston and Hauxton	30.2	12.7	7.2	- 1.6
Haslingfield and The Eversdens	13.3	2.5	- 0.5	- 2.9
Histon and Impington	- 3.6	9.5	- 4.3	19
Linton	- 1.3	- 25.1	1.1	- 3.2
Longstanton	- 10.8	- 3.5	- 12.3	14
Melbourn	10.6	0.3	13.9	- 12.9
Meldreth	- 26.3	- 19.3	- 1.7	- 9
Milton	1	4.2	- 7.8	7.6
Orwell and Barrington	- 3.6	- 11.1	5.7	- 14.8
Sawston	- 10.7	4.5	- 16.6	8.2
Swavesey	1.9	- 3.3	- 3.9	15.9

Section 2.4 Background information

District and ward name	Past year	Past 2 years	Past 3 years	Past 4 years
Teversham	- 13	9.7	21	21.1
The Abingtons	7.5	44.8	1.2	50.8
The Mordens	24.3	31.5	9.5	17.1
The Shelfords and Stapleford	11.2	1.7	- 0.1	29.8
The Wilbrahams	62.9	14.3	- 7.9	56
Waterbeach	- 3.8	- 5.6	4.5	12.5
Whittlesford	10.6	28.1	- 20.1	43.6
Willingham and Over	- 3.1	- 4.1	1.4	12.8
Bourn	16.7	4.9	7.8	23.6
Papworth and Elsworth	- 2.4	- 12.8	1.9	- 4.8
Forest Heath				
All Saints	21.4	- 11.5	- 8.1	17.1
Brandon East	3.9	- 6.4	1.4	10.8
Brandon West	- 2.9	17.3	2.7	11.3
Eriswell and The Rows	4.5	3	- 1.1	15.9
Exning	- 12.6	36.5	14.9	3
Great Heath	-9.3	- 3.9	- 2.9	- 4.1
Iceni	1.9	4.9	- 3.2	17.9
Lakenheath	2.2	13.7	- 3.9	10.6
Manor	12.6	16.5	8.9	30.1
Market	2.9	4.9	10.8	16.7
Red Lodge	0.6	- 2.5	17.9	- 8.7
St. Mary's	- 14.3	2	- 9.7	13.8
Severals	0.9	- 4.8	30.9	20.8
South	- 7.7	21.5	2.8	- 8.4
St Edmundsbury				
Abbeygate	- 0.6	14.6	6.5	18.4
Bardwell	- 13.8	- 7.8	15.2	- 20.9
Barningham	9.3	- 11.4	21	2.8
Barrow	6.1	- 0.8	5.9	- 5.6
Cavendish	- 8.9	-13	1.2	- 13.3
Chedburgh	3.9	- 28.5	- 4.6	- 23.1
Clare	21	24.4	7.3	37.5
Eastgate	28	14.5	5.1	12.1
Fornham	4.8	3.6	1.8	38.4
Great Barton	28	27.2	49	42.8
Haverhill East	- 1.3	15.6	- 2.6	14.3
Haverhill North	- 2.1	- 7.5	20.3	2
Haverhill South	4.8	16.4	- 27.1	21
Haverhill West	2.9	5.7	- 0.6	9.7
Horringer and Whelnetham	14.5	- 14.9	6	- 0.5
Hundon	22.5	- 11.3	7.2	- 6.9
Ixworth	- 21.7	- 14.7	- 9.9	6.7
Kedington	- 19.4	- 22	- 20.6	- 11.4
Minden	- 13.2	- 0.5	- 6.6	12
Moreton Hall	3.7	7.9	- 39.7	9.9
Northgate	1.3	11.3	16.8	- 2.3
Pakenham	50.5	4.9	2.4	21.1
Risby	- 1.6	35.2	- 2.7	27.9
Risbygate	6.4	2.4	- 1	25.6
Rougham	- 0.4	- 4.3	17.6	17.4
St. Olaves	11	12.4	20	38.3
Southgate	5.4	4.4	- 9.8	36.5
Stanton	15.8	- 9.5	- 11.2	5
Westgate	2.7	- 4.1	22.9	12.9
Wickhambrook	- 18.3	- 11.8	- 13.1	1.3
Withersfield	35.1	16.8	20.7	60.4

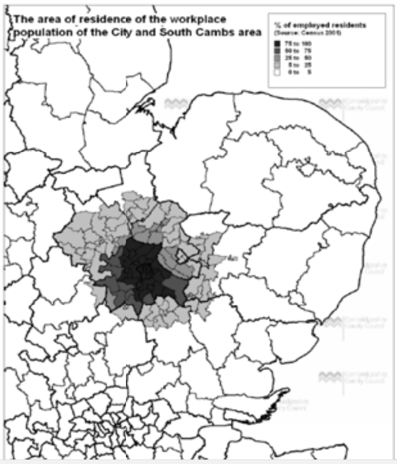
Source: Hometrack, downloaded December 2013

Section 2.4 Background information

2011 Census-based maps showing live/work patterns

For further detail and larger maps, with commentary, please see Chapter 2 of the SHMA 2012 at http://www.cambridgeshireinsight.org.uk/housing/previous-versions.

Cambridge & South Cambs



Ely

Wisbech

March

Chatteris

Whittlesey

Huntingdon

St Neots

St Ives

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Ramsey

Newmarket

Brandon & Lakenheath

Mildenhall

Haverhill

Bury St Edmunds

Peterborough

Royston

Downham Market

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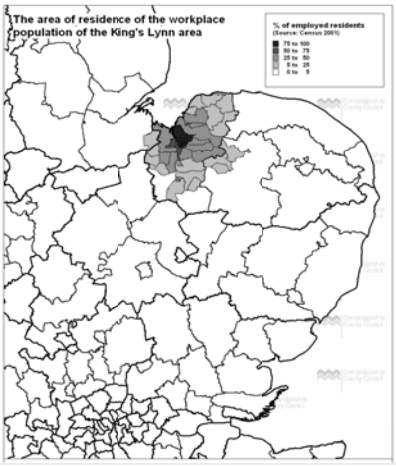
<tr><td>
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Source: SHMA 2012, Chapter 2 Defining our market area; using Census 2001 data