Defining housing markets using commuting patterns

7.1 Introduction ...........................................................................................................................1
7.2 Mapping ...............................................................................................................................2
7.3 Cambridge City & South Cambridgeshire – ‘greater Cambridge’........................................3
7.4 Peterborough City.................................................................................................................4
7.5 Huntingdonshire District ....................................................................................................5
7.6 Fenland District....................................................................................................................9
7.7 East Cambridgeshire ..........................................................................................................13
7.8 Forest Heath .......................................................................................................................14
7.9 St Edmundsbury .................................................................................................................17
7.10 Outside the Cambridge Sub-region ..................................................................................19

Table 1: Wards with 5% or more of Employed Residents Working in Greater London, 2001 ..........23
7.11 Conclusions.......................................................................................................................24
7.12 Implications .......................................................................................................................24

Table A.1 Workplace Population of Market Towns/centres, 2001 ...................................................25
Chapter 7. Defining housing markets using commuting patterns

7.1 Introduction

The Communities & Local Government (CLG) guidance relating to defining housing market areas recommends considering a number of approaches. One of these is to analyse labour market areas, based on commuting hinterlands. This is considered a particularly useful approach for the Cambridge sub-region for the following reasons:

- The area has experienced – and is forecast to continue to experience – significant population growth linked to local economic prosperity.
- Analysis of migration at the time of the 2001 Population Census reinforces this picture; net migration tends to involve people of working age who are employed locally.
- The sub-region as a whole has a virtual ‘balance’ of resident labour force and workplace jobs. This means that out-commuting is balanced by in-commuting. The sub-region is not a ‘dormitory’ for workers employed elsewhere.
- There is very little evidence of any significant retirement market – although this is of local importance in Fenland. The 2001 Census indicated around one-third of Fenland’s net adult migrants in the preceding year were retired. The only other district with some modest retirement-led migration is St Edmundsbury.
- There is very little provision or development of holiday or second homes in the sub-region.

As chapters 9 and 10 on the economic and demographic context show, a large share of population and housing growth has occurred as a response to labour market success. The East of England Plan has been developed on the assumption that the conditions for economic prosperity will continue and will be the driver for further growth.

However, it is true to say that the Cambridge housing sub-region is not based on any functional analysis of economic interdependency. It is the combination of 7 adjacent districts. This chapter examines the commuting hinterlands contained within and influencing this area. The very detailed commuting data provided by the 2001 Census has been used to map commuting areas at a number of levels.

At the highest level, labour markets relate to the two regional cities, Cambridge and Peterborough. In the case of Cambridge, the City has a very tight boundary and in recent years much of the new development of employment locations and also housing has taken place in adjacent South Cambridgeshire - often adjacent to the built-up Cambridge area. South Cambridgeshire itself has no ‘town’ and employment is widely spread through around 100 villages. For this reason there are some significant overlaps between the Cambridge market and parts of that of South Cambridgeshire, and the two markets are treated together for the purpose of this analysis. This differs from Peterborough, where the employment, or labour market, area is defined as the unitary authority.

Below the ‘city’ level the labour markets analysed are market towns and their hinterlands. However, these have been defined on pragmatic lines, so include adjacent villages, (using wards as building blocks), where there are employment sites. Some market towns are considerably larger than others – such as Huntingdon and Bury St Edmunds contained within the Cambridge sub-region.
Finally, the analysis pays particular attention to the influence of the greater London area on the sub-region. There is a general conception that London has a large – and growing – attraction as an employment centre. Although now 6 years old, the 2001 Census provides a ‘reality check’ on just how important the London influence is.

### 7.2 Mapping

The commuting maps which accompany this report analyse the percentage of employed residents living in wards who work in specified locations. The ‘cut-off’ point is 5%; the maps show, at the lowest level, where between 5% and 25% of employed residents work in a specified city or town. Any area depicted as ‘white’ on a map has fewer than 5% of its residents working in the town/city of concern. It is therefore considered to be outside that specific labour market.

Some areas will be part of more than one labour market, although it is very rare for a ward to be part of more than two! Examples of areas looking to several labour markets include the Isleham ward in East Cambridgeshire – Cambridge and South Cambridgeshire, Ely, Mildenhall and Newmarket all attract between 5% and 25% of the ward’s employed residents. In contrast some wards in Cambridge City look only to Cambridge and South Cambridgeshire for employment.

The following pages set out the commuting pattern maps with brief comments on each.
7.3 **Cambridge City & South Cambridgeshire**

Providing 142,800 workplace population jobs in 2001, these overlapping labour markets dominate the southern parts of the Cambridge sub-region. The map shows that within the Cambridge and South Cambridgeshire districts most wards have 50% or more of their employed residents working locally. There is just one ward where the percentage drops to 25%-50%.

In terms of the sphere of influence outside the two Districts there are a small number of wards where between 25% to 50% of employed residents commute to the City/South Cambridgeshire. Most of these are in East Cambridgeshire, with some limited influence in east Huntingdonshire. No wards in Fenland, Forest Heath, St Edmundsbury, Uttlesford, Braintree, North Hertfordshire or Mid Bedfordshire contribute more than 25% of their employed residents to the ‘greater Cambridge’ workforce.

This challenges the common view that Cambridge attracts a large share of daily commuters who live in Huntingdonshire and even Peterborough City. However, although shares are generally low, there are still relatively high numbers of commuters.
7.4 Peterborough City

As the map shows, Peterborough’s commuting hinterland generally straddles more extensive territory to the west and north of the city than to the east – and more especially, the south. However, Whittlesey (Fenland), and the Yaxley/Elton areas of Huntingdonshire contribute between 25% and 50% of their employed residents to the Peterborough labour market, (90,600 workplace population in 2001). There are also a number of wards in Huntingdonshire and Fenland – between Whittlesey and March/Wisbech – with between 5% and 25% of their employed residents working in Peterborough.
7.5 Huntingdonshire District

- Huntingdon

The Huntingdon employment area covers not only the market town, but also Godmanchester, Alconbury and the Stukeleys. The 2001 Census showed an excess of workplace jobs as compared with employed residents, supporting in-commuting. The town’s influence stretches throughout all but the most northerly wards of the district, but generally at the 5% to 25% commuting level. The map shows that the sphere of influence outside Huntingdonshire district is very limited. There are a very few wards in western South Cambridgeshire and in southern Fenland, around Chatteris, where between 5% and 25% of employed residents commute to work in Huntingdon.
### St Neots

St Neots, together with an adjacent ward Roxton in Bedfordshire, generally looks westwards for its labour market. No ward in South Cambridgeshire – or elsewhere in the Cambridge Sub-region – contributes 5% or more of its employed residents to its labour force.
St Ives

St Ives is the third largest employment centre in Huntingdonshire. The commuting labour market is very tightly defined. The 2001 Census indicated that there were no wards outside of Huntingdonshire which contributed even 5% of their residents to work in St Ives.
- **Ramsey/Bury**

Finally in Huntingdonshire, the Census shows that Ramsey/Bury has a slightly more diffuse commuting hinterland than the market towns to the south. But even here, most commuting is very local within Huntingdonshire. The exception relates to commuting from Fenland, where there is limited travel to work (at a 5%-25% level). There is no discernible commuting from Peterborough or Whittlesey to the Ramsey area.
7.6 Fenland District

The Fenland labour market is dominated by the four market towns, Wisbech, March, Chatteris and Whittlesey.

- **Wisbech**

Wisbech is the largest employment centre in Fenland and had net in-commuting in 2001. The ‘employment centre’ analysed for this report includes adjoining wards in Norfolk, (West Walton). The market town clearly acts as a jobs centre for not only Cambridgeshire, but also western Norfolk and, to a lesser extent, parts of South Holland District in Lincolnshire. The Wisbech labour market covers a number of Fenland wards south of the town, but none in East Cambridgeshire or Peterborough.
March

The labour market linked to March is totally confined within Fenland. It extends to the edge of Chatteris and north to Wisbech. Despite the presence of a railway station, there is very little in-commuting from Peterborough or East Cambridgeshire; no ward in either District contributed even a 5% share of their employed residents to work in March.
Chatteris

The commuting hinterland of Chatteris is extremely tight. Despite its location on the Fenland boundary, no ward outside of Fenland contributed more than 5% of its employed residents to the Chatteris labour force.
**Whittlesey**

The fourth market town in Fenland, Whittlesey, is located to the south-east of Peterborough. The map indicates an almost totally enclosed labour market in terms of in-commuting; no ward outside of the 7 wards constituting the Whittlesey labour market contributed even 6% of its employed residents as commuters to the area in 2001. However, as recorded under ‘Peterborough’, the Whittlesey wards collectively contributed between 25% and 50%, (39%) of their employed residents as part of the Peterborough workforce.
7.7 East Cambridgeshire

- Ely

Ely is the only market city/town of any size in this District. It recorded a surplus of ‘workplace jobs’ in 2001 as compared with employed residents. However, the accompanying ‘commuting map’ indicates that the labour market is very tight; it is totally enclosed within East Cambridgeshire. This means that no ward in another District has more than 5% of its employed residents working in the city. The labour market looks to the north and west predominantly, rather than to the south.
### 7.8 Forest Heath

- **Newmarket**

Newmarket is almost totally surrounded by East Cambridgeshire district. It is to be expected, therefore, that the commuting hinterland will extend outside Forest Heath. The map shows, indeed, that relatively more wards located in East Cambridgeshire contribute their workers to employment in Newmarket than do wards in other parts of Forest Heath. There are also areas of St Edmundsbury which contribute 5% or more of their employed residents to work in Newmarket. Despite their proximity, there appears to be very little commuting from South Cambridgeshire wards to Newmarket.
For the purposes of this analysis, the Brandon/Lakenheath labour market has been combined. It is important to appreciate the importance of the USAF base at Lakenheath as an employment centre. Forces’ personnel are located on specific housing estates, including Feltwell in Norfolk. So, apart from Forest Heath, the commuting hinterland is restricted to northern wards in Kings Lynn & West Norfolk and Breckland Districts.
Mildenhall

The map shows a relatively wide-ranging commuter area, including East Cambridgeshire, Kings Lynn & West Norfolk, Breckland and St Edmundsbury. With an armed forces base a significant element of commuting is determined by the location of housing for military personnel. All surrounding Districts have wards contributing between 5% and 25% of their employed residents to work in the Mildenhall area. In fact Mildenhall is one of the few towns outside Cambridgeshire to attract a significant number of commuters.
7.9 St Edmundsbury

Haverhill

Haverhill is located close to the boundary of several Districts – St Edmundsbury, South Cambridgeshire, East Cambridgeshire, Braintree and Uttlesford. However, as the commuting map shows, the labour market area is very tightly drawn. Only wards in St Edmundsbury and Braintree contribute 5% or more of their employed residents to work in the town. No wards in adjacent South Cambridgeshire have even modest commuting to the town.
Bury St Edmunds

Bury St Edmunds is one of the largest towns in the sub-region. As the map shows, there is a significant labour market associated with the town. However, there is only one ward outside of St Edmundsbury Borough which contributed 25% or more of its employed residents to the town’s workforce. Most other ‘commuter’ wards in other districts contributed between 5% and 25% of their employed workforce to the Bury St Edmunds labour market. Commuter wards are located in Forest Heath, Babergh and Mid Suffolk.
7.10 **Outside the Cambridge Sub-region**

- **Royston (North Hertfordshire)**

Located immediately to the south of South Cambridgeshire, Royston has a very tight commuter hinterland. In fact, apart from wards in Royston itself, commuting is generally restricted to a number of wards in South Cambridgeshire. However, none of these wards contributed more than 25% of their employed residents to Royston’s workforce in 2001.
- **Downham Market (Kings Lynn & West Norfolk)**

  Downham Market, in Kings Lynn & West Norfolk, has a commuting hinterland which is totally constrained within Norfolk – and the District. No ward in Fenland contributed even 5% of its employed residents to the town’s workforce in 2001.
- **Kings Lynn (Kings Lynn & West Norfolk)**

Kings Lynn is a major employment centre in Norfolk and provides services such as health and hospitals for many areas of Fenland. However, as far as employment goes, the accompanying commuting map shows that the labour market is almost entirely focussed on Norfolk. Not one ward in Fenland contributed even 5% of their employed residents to the Kings Lynn economy. The town generally looks to the north and east for its commuters.
- **Saffron Walden (Uttlesford)**

Finally, the maps look at the labour market associated with Saffron Walden in Uttlesford, located close to the South Cambridgeshire border. The town has a tight labour market and only one ward outside the District contributed 5% or more of its employed residents to the Saffron Walden economy, (located in Braintree). No South Cambridgeshire wards form a prominent part of the town’s labour market.
London

The 2001 Census provides information on numbers of residents commuting to the greater London area. In relation to the Cambridge Sub-region, most wards with a significant number or proportion of commuters include, or are close to, railway stations. Table 1 shows those 14 wards with 5% or more of employed residents working in London in 2001. This share may well have increased in more recent years, but problems with disruption to journeys and the high cost of rail travel suggest that growth has not been rapid. It is interesting to note that a survey of residents of the new village of Cambourne, dated summer 2006, located a short drive from St Neots and its station on the East Coast main line, recorded 6% of employed residents working in London.

Table 1: Wards with 5% or more of Employed Residents Working in Greater London, 2001

<table>
<thead>
<tr>
<th>Ward</th>
<th>District</th>
<th>% Employed Residents working in London 2001</th>
</tr>
</thead>
<tbody>
<tr>
<td>Whittlesford</td>
<td>South Cambridgeshire</td>
<td>8.6%</td>
</tr>
<tr>
<td>The Mordens</td>
<td>South Cambridgeshire</td>
<td>7%</td>
</tr>
<tr>
<td>Ellington</td>
<td>Huntingdonshire</td>
<td>6.8%</td>
</tr>
<tr>
<td>Huntingdon West</td>
<td>Huntingdonshire</td>
<td>6.8%</td>
</tr>
<tr>
<td>Fowlmere &amp; Foxton</td>
<td>South Cambridgeshire</td>
<td>6.6%</td>
</tr>
<tr>
<td>Petersfield</td>
<td>Cambridge City</td>
<td>6.2%</td>
</tr>
<tr>
<td>Orwell &amp; Barrington</td>
<td>South Cambridgeshire</td>
<td>6.1%</td>
</tr>
<tr>
<td>Melbourn</td>
<td>South Cambridgeshire</td>
<td>5.8%</td>
</tr>
<tr>
<td>Meldreth</td>
<td>South Cambridgeshire</td>
<td>5.7%</td>
</tr>
<tr>
<td>Kimbolton &amp; Stoughton</td>
<td>Huntingdonshire</td>
<td>5.7%</td>
</tr>
<tr>
<td>St Neots Priory Park</td>
<td>Huntingdonshire</td>
<td>5.7%</td>
</tr>
<tr>
<td>Gransden &amp; the Offords</td>
<td>Huntingdonshire</td>
<td>5.3%</td>
</tr>
<tr>
<td>Duxford</td>
<td>South Cambridgeshire</td>
<td>5%</td>
</tr>
<tr>
<td>Gamlingay</td>
<td>South Cambridgeshire</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: Census 2001

Table 1 shows Whittlesford in South Cambridgeshire as having 8.6% of its employed residents working in London, with the Mordens on 7%.
7.11 Conclusions

- The two major 'city-regions' of Peterborough and Cambridge/South Cambridgeshire have fairly widespread labour markets, although most commuting is generally short-distance.
- Most market towns in the Cambridge sub-region have tight commuter hinterlands.
- Peterborough's labour market looks north and west more than south and east.
- Very few areas contribute 5% or more of their workforce to a large number of labour markets.
- Consequently most ‘residence’ areas look to one or two labour markets only.
- Most people are likely to seek housing fairly close to their place of work.
- Although experiencing relatively low house prices, Fenland does not appear to have become a major commuter ‘suburb’ for Cambridge; in 2001 no ward contributed more than 25% of its employed residents to work in Cambridge/South Cambridgeshire.
- London is not the commuter ‘honey-pot’ of popular myth for Cambridgeshire residents. As at 2001 the ward with the highest proportion of employed residents working in London was Whittlesford, with 8.6%. Only one Cambridge City ward recorded 5% or more of its employed residents as London commuters - Petersfield, with 6.2%.

7.12 Implications

The seven districts comprising the Cambridge sub-region display a number of small local labour markets with relatively little overlap of commuting hinterlands. All market towns have a clear labour market and only the largest have commuter belts extending beyond 10 miles radius. Generally speaking, hinterlands are mainly constrained within districts.

As most migration involves people in work, these commuting markets are a good proxy for very local housing markets. In terms of future planning it is important that the areas develop employment opportunities to match new housing development. The main area where housing and employment development appear to have become somewhat ‘out of synch’ is Ely. There is relatively high commuting to Cambridge and South Cambridgeshire, with some wards recording between 25% and 50% of employed residents travelling out of the district.
Appendix 1: Employment and Workplace

Table A1 shows total employment, or workplace population, in each market town and the percentage this represents of each District/area's total employment, (where a ward outside the Cambridge Sub-region is included). The wards covered are listed below. The table is restricted to towns lying primarily within the Sub-region.

Table A.1 Workplace Population of Market Towns/centres, 2001

<table>
<thead>
<tr>
<th>Market Towns/centres</th>
<th>Total Employment</th>
<th>% of District/area Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Huntingdon</td>
<td>24,730</td>
<td>34.8%</td>
</tr>
<tr>
<td>St Neots</td>
<td>13,370</td>
<td>18.8%</td>
</tr>
<tr>
<td>St Ives</td>
<td>9,600</td>
<td>13.5%</td>
</tr>
<tr>
<td>Ramsey/Bury</td>
<td>8,070</td>
<td>11.4%</td>
</tr>
<tr>
<td><strong>Total Hunts market towns</strong></td>
<td><strong>55,770</strong></td>
<td><strong>78.5%</strong></td>
</tr>
<tr>
<td>Wisbech</td>
<td>13,530</td>
<td>41.3%</td>
</tr>
<tr>
<td>March</td>
<td>7,610</td>
<td>23.2%</td>
</tr>
<tr>
<td>Chatteris</td>
<td>2,930</td>
<td>8.9%</td>
</tr>
<tr>
<td>Whittlesey</td>
<td>5,390</td>
<td>16.5%</td>
</tr>
<tr>
<td><strong>Total Fenland market towns</strong></td>
<td><strong>29,460</strong></td>
<td><strong>90.0%</strong></td>
</tr>
<tr>
<td>Ely</td>
<td>8,140</td>
<td>32.7%</td>
</tr>
<tr>
<td>Newmarket</td>
<td>10,310</td>
<td>32.1%</td>
</tr>
<tr>
<td>Brandon/Lakenheath</td>
<td>4,560</td>
<td>14.2%</td>
</tr>
<tr>
<td>Mildenhall</td>
<td>14,460</td>
<td>45.0%</td>
</tr>
<tr>
<td><strong>Total Forest Heath market towns</strong></td>
<td><strong>29,330</strong></td>
<td><strong>91.2%</strong></td>
</tr>
<tr>
<td>Haverhill</td>
<td>9,320</td>
<td>18.3%</td>
</tr>
<tr>
<td>Bury St Edmunds</td>
<td>25,920</td>
<td>50.8%</td>
</tr>
<tr>
<td><strong>Total St Edmundsbury market towns</strong></td>
<td><strong>35,240</strong></td>
<td><strong>69.0%</strong></td>
</tr>
</tbody>
</table>

Source: Census 2001

The table shows that over 55,500 people worked in the four market towns in Huntingdonshire, around 79% of the total workplace population of the District. The share of employment accounted for by the four Fenland market towns/hinterlands was even higher, 90%. Ely provided just less than one-third of all workplace jobs in East Cambridgeshire. The three market towns and adjoining bases in Forest Heath provided work for over 29,000 people, 91% of the total in the District. Finally, Haverhill and Bury St Edmunds together provided over 35,200 people with work, 69% of the District total.

In addition, the combined workplace population of Cambridge City & South Cambridgeshire was 142,800 and Peterborough’s employment was recorded as 90,620 people.
Appendix 2: The Wards

The wards included in each market town/centre, both within the Cambridge sub-region and in adjoining Districts, are as follows:

**St Neots**
- 12UEHB Little Paxton
- 12UEHG St Neots Eaton Ford
- 12UEHH St Neots Eaton Socon
- 12UEHJ St Neots Eynesbury
- 12UEHK St Neots Priory Park
- 09UDHC Roxton

**Huntingdon**
- 12UEGM Alconbury and The Stukeleys
- 12UEGU Godmanchester
- 12UEGX Huntingdon East
- 12UEGY Huntingdon North
- 12UEGZ Huntingdon West

**St Ives**
- 12UEGO Earith
- 12UEHD St Ives East
- 12UEHE St Ives South
- 12UEHF St Ives West
- 12UEHP The Hemingfords

**Ramsey/Bury**
- 12UEHC Ramsey
- 12UEHQ Upwood and The Raveleys
- 12UEHR Warboys and Bury

**Whittlesey**
- 12UDGC Bassenhally
- 12UDGD Benwick, Coates and Eastrea
- 12UDGF Delph
- 12UDGL Kingsmoor
- 12UDGN Luttersey
- 12UDGY St Andrews
- 12UDGZ St Marys

**Wisbech**
- 12UDGF Clarkson
- 12UDGH Hill
- 12UDGM Kirkgate
- 12UDGT Medworth
- 12UDGW Peckover
- 12UDGX Roman Bank
- 12UDHB Saithe
- 12UDHD Waterlees
- 33UEJH Walton

**March**
- 12UDGO March East
- 12UDGR March North
- 12UDGS March West

**Chatteris**
- 12UDGE Birch
- 12UDHA Slade Lode
- 12UDHC The Mills
- 12UDHE Wenneye

**Ely**
- 12UCGA Ely East
- 12UCGB Ely North
- 12UCGC Ely South
- 12UCGD Ely West

**Royston**
- 26UFGH Ermine
- 26UFHB Royston Heath
- 26UFHC Royston Meridian
- 26UFHD Royston Palace

**Downham Market**
- 33UEHB Downham Old Town
- 33UEHC East Downham
- 33UEHP North Downham
- 33UEJA South Downham

**King's Lynn**
- 33UEHE Fairstead
- 33UEHG Gaywood Chase
- 33UEHH Gaywood North Bank
- 33UEHO North Lynn
- 33UEHR North Wootton
- 33UEHS Old Gaywood
- 33UEHX St Margaret's with St Nicholas
- 33UEHZ South and West Lynn
- 33UEJB South Wootton
- 33UEJD Springwood

**Newmarket**
- 42UCFR All Saints
- 42UCFW Exning
- 42UCGD St Mary's
- 42UCGE Seversal

**Haverhill**
- 42UFGX Haverhill East
- 42UFGY Haverhill North
- 42UFGZ Haverhill South
- 42UFHA Haverhill West
- 22UCGU Bumpstead

**Mildenhall**
- 42UCFU Eriswell and The Rows
- 42UCFX Great Heath
- 42UCGB Market

**Brandon & Lakenheath**
- 42UCFS Brandon East
- 42UCFT Brandon West
- 42UCFZ Lakenheath

**Bury St Edmunds**
- 42UFGL Abbeygate
- 42UFGT Eastgate
- 42UFGF Minden
- 42UFGH Moreton Hall
- 42UFGH Northgate
- 42UFHL Risbygate
- 42UFGN St Olaves
- 42UFHP Southgate
- 42UFHR Westgate

**Saffron Walden**
- 22UQGX Saffron Walden Audley
- 22UQGY Saffron Walden Castle
- 22UQGZ Saffron Walden Shire