

Defining housing markets using commuting patterns

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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.

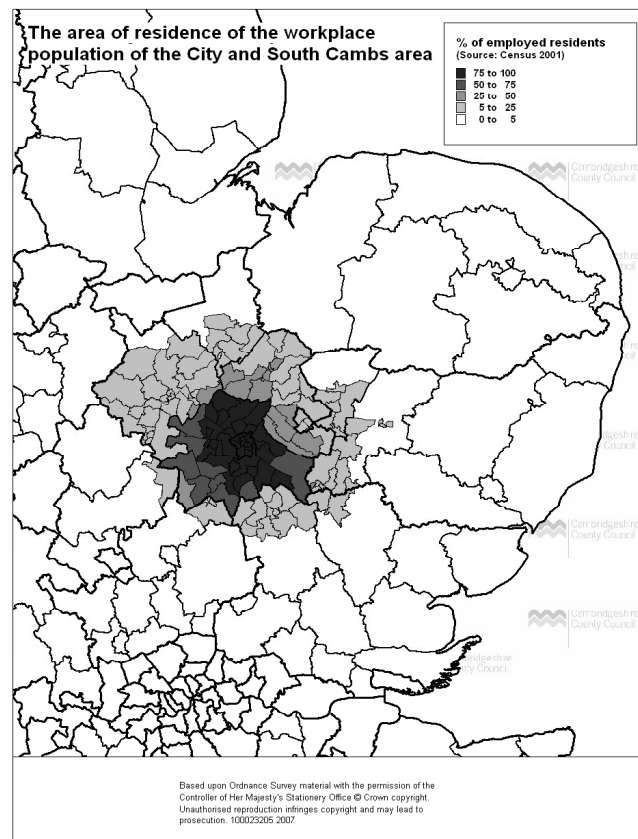
The following pages set out the commuting pattern maps with brief comments on each.

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%.

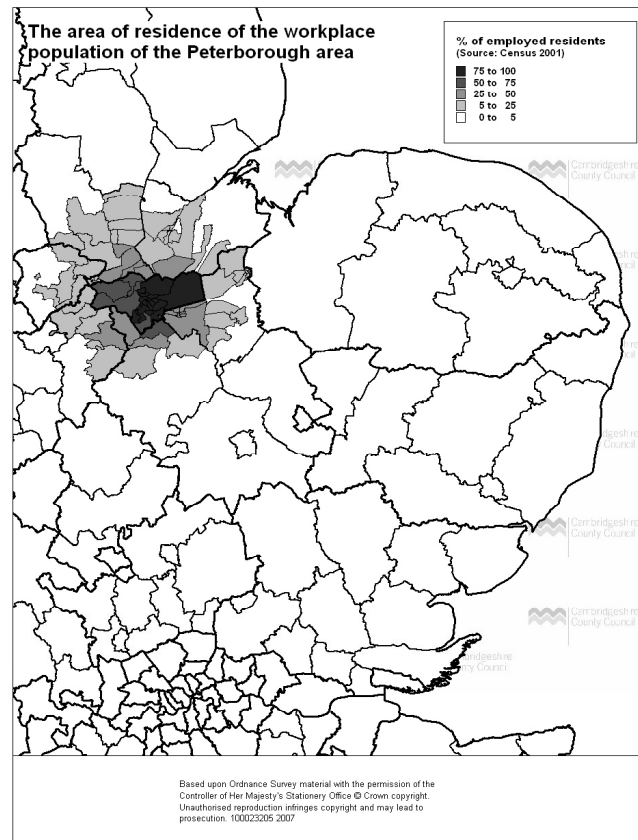
In terms of the sphere of influence outside the two Districts there are a small number of wards where between 25% to 50% of employed residents commute to the City/South Cambridgeshire. Most of these are in East Cambridgeshire, with some limited influence in east Huntingdonshire. No wards in Fenland, 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

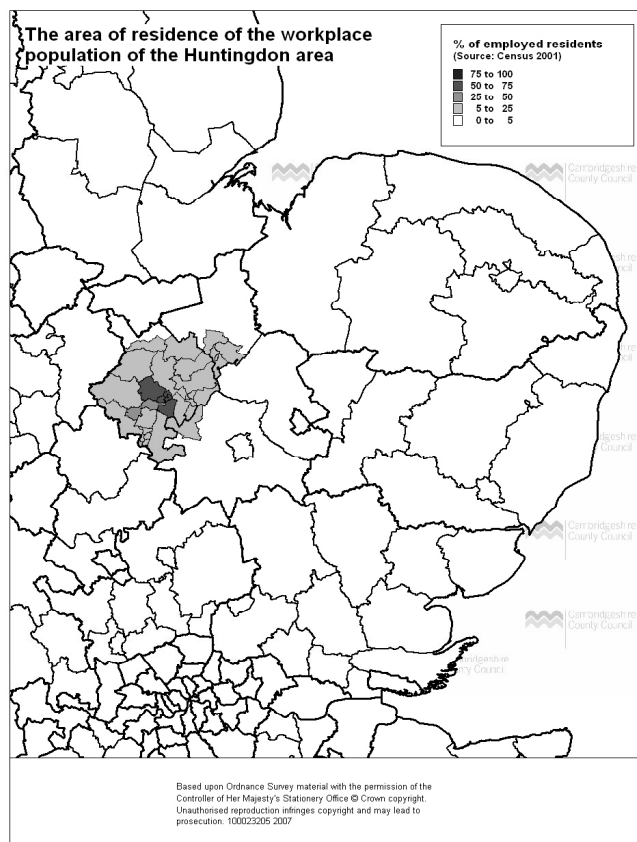
As the map shows, Peterborough's commuting hinterland generally straddles more extensive territory to the west and north of the city than to the east – and more especially, the south. However, Whittlesey (Fenland), and the Yaxley/Elton areas of Huntingdonshire contribute between 25% and 50% of their 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

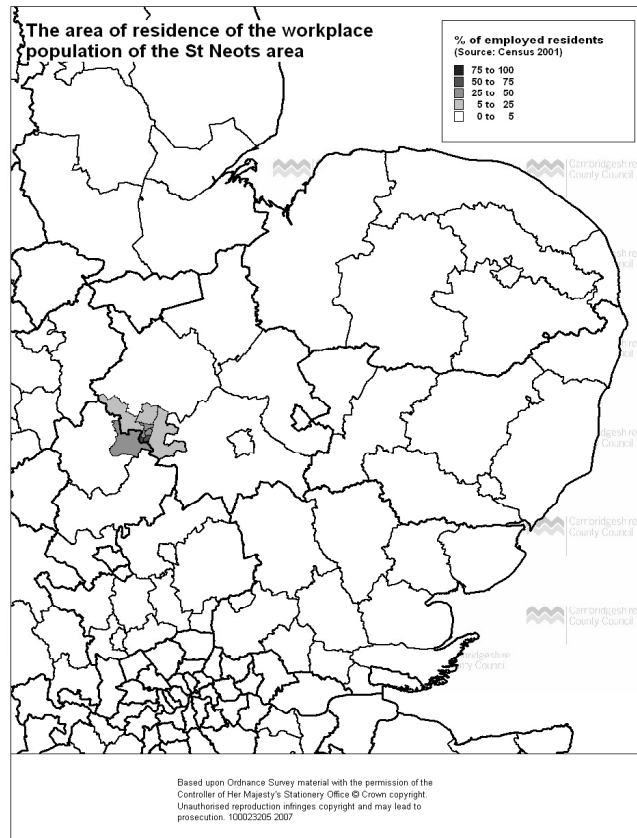
▪ Huntingdon

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.



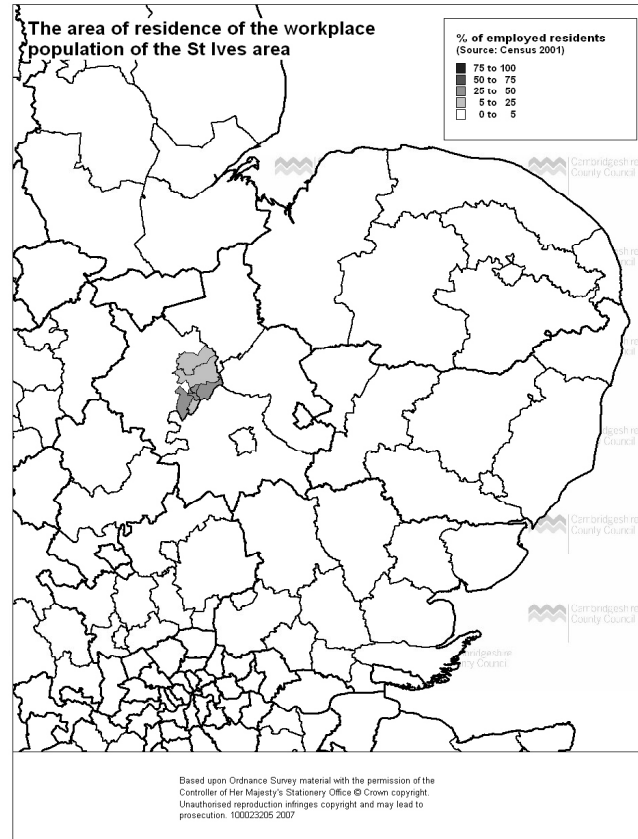
▪ **St Neots**

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.



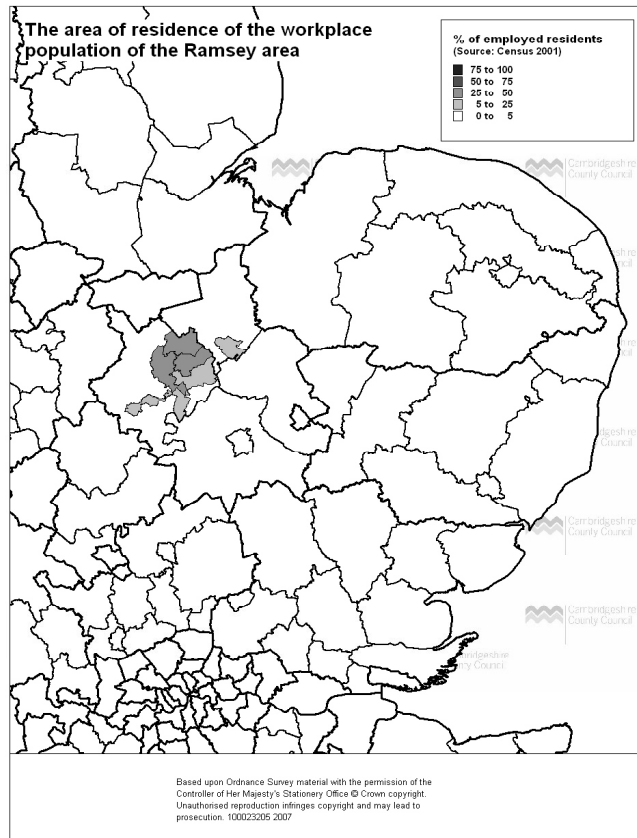
- **St Ives**

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.

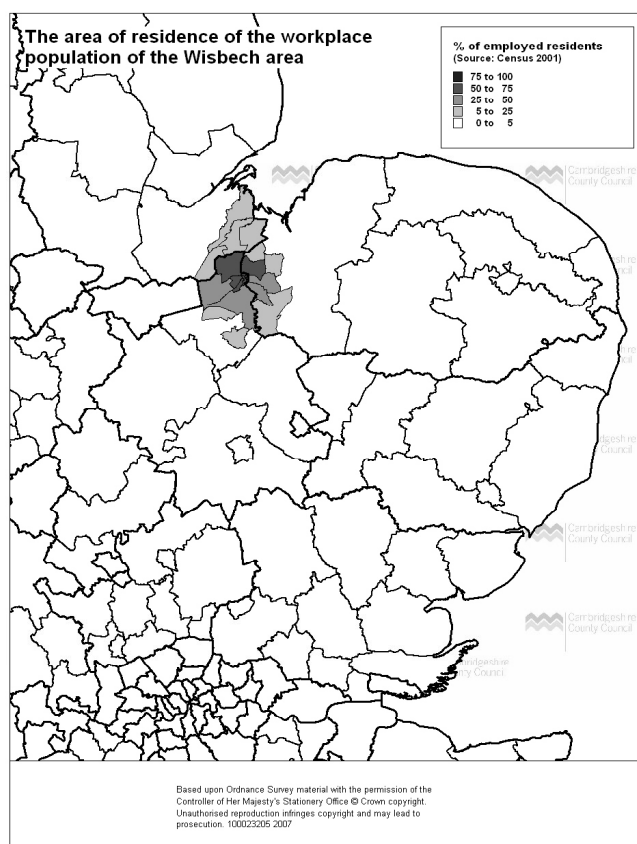


7.6 Fenland District

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

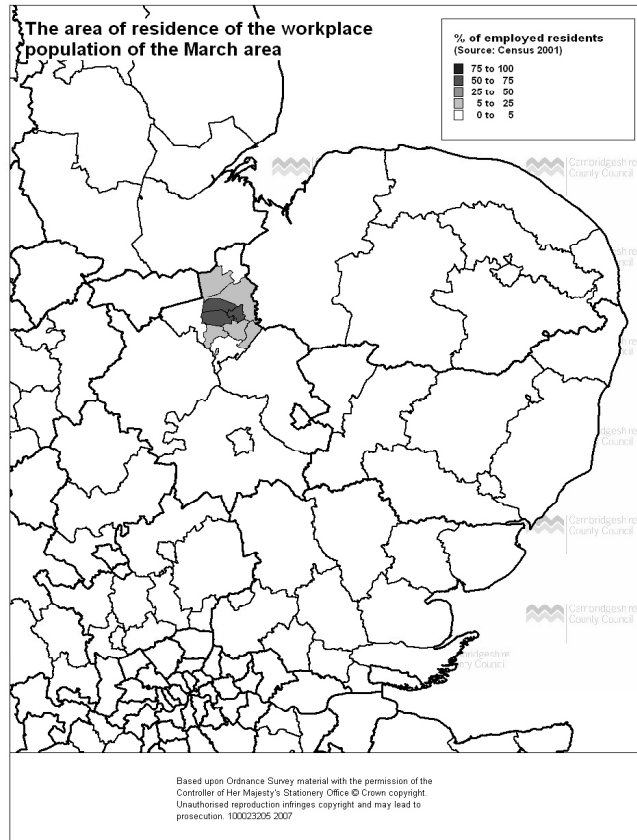
▪ Wisbech

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.



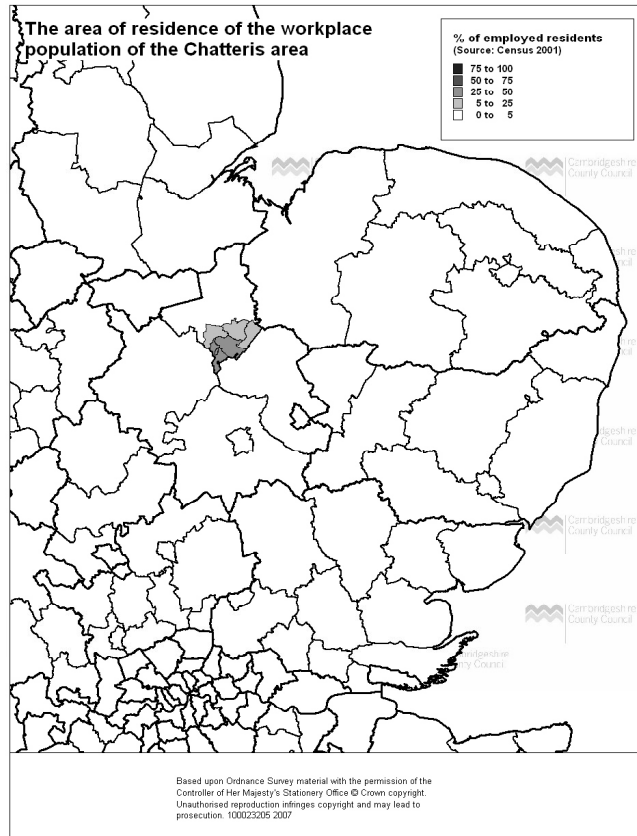
▪ **March**

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.



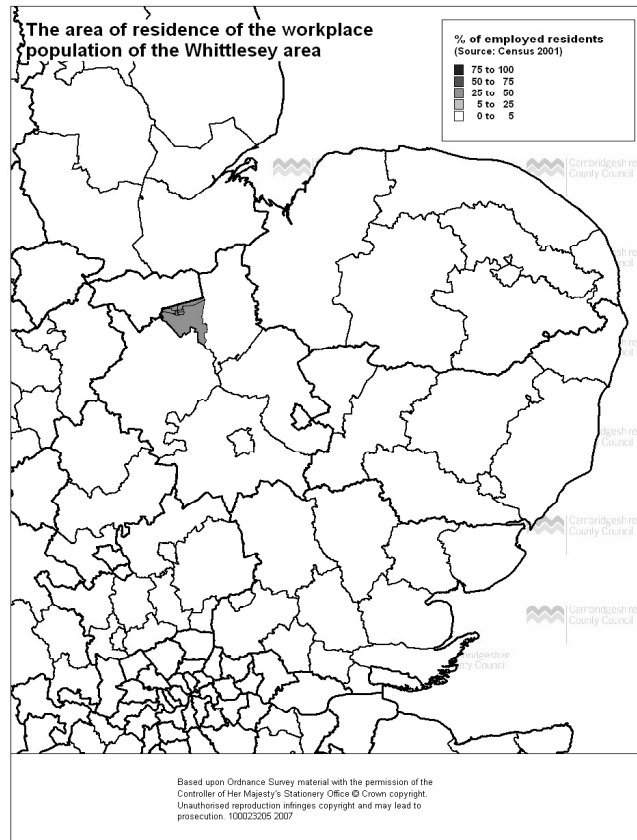
- **Chatteris**

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**

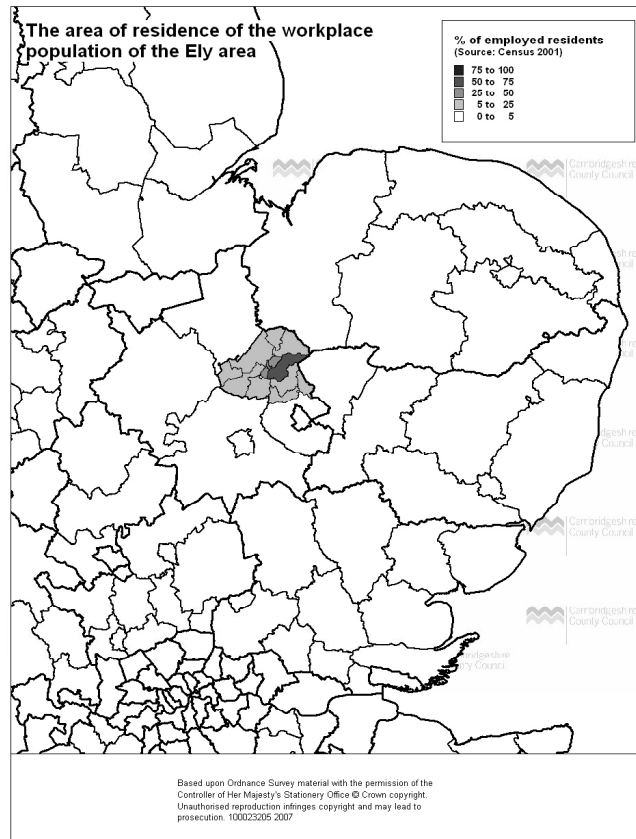
The fourth market town in Fenland, Whittlesey, is located to the south-east of Peterborough. The map indicates an almost totally enclosed labour market in terms of in-commuting; no ward outside of the 7 wards constituting the Whittlesey labour market contributed even 6% of its employed residents as commuters 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**

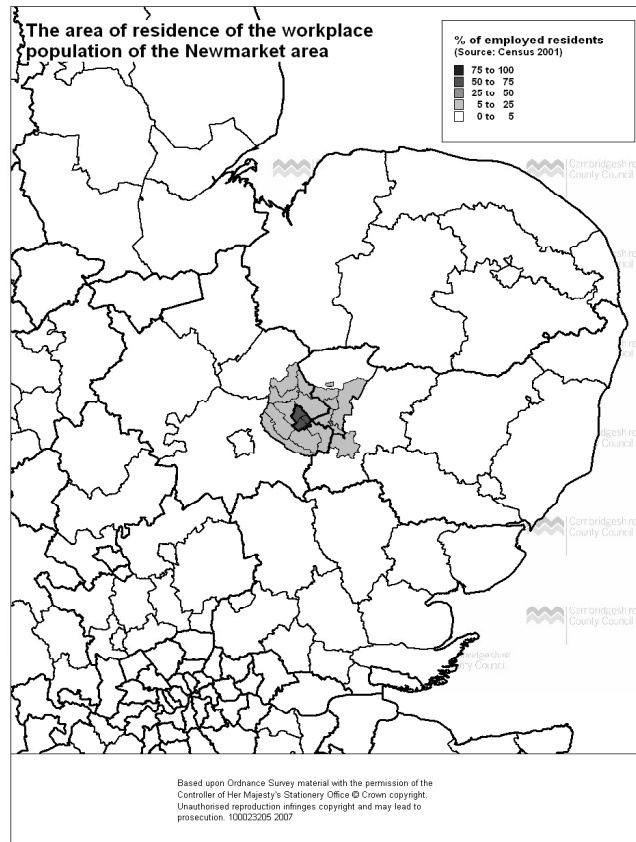
Ely is the only market city/town of any size in this District. It recorded a surplus of 'workplace jobs' in 2001 as compared with employed residents. However, the accompanying 'commuting map' indicates that the labour market is very tight; it is totally enclosed within East Cambridgeshire. This means 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

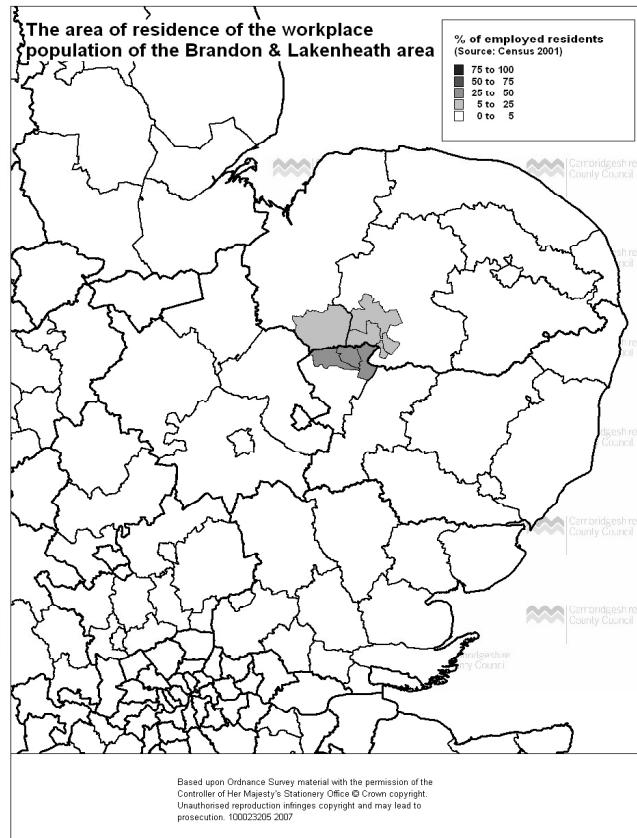
▪ Newmarket

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.



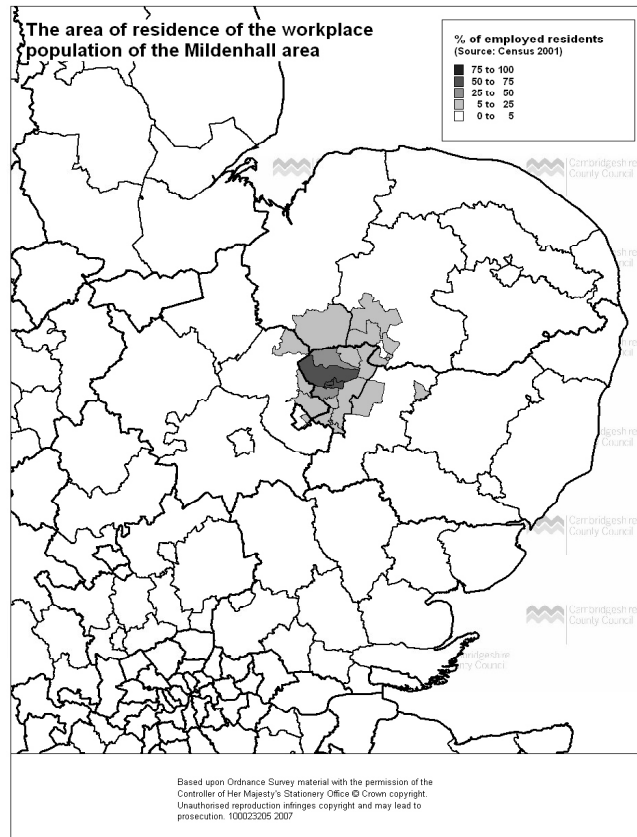
▪ **Brandon/Lakenheath**

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**

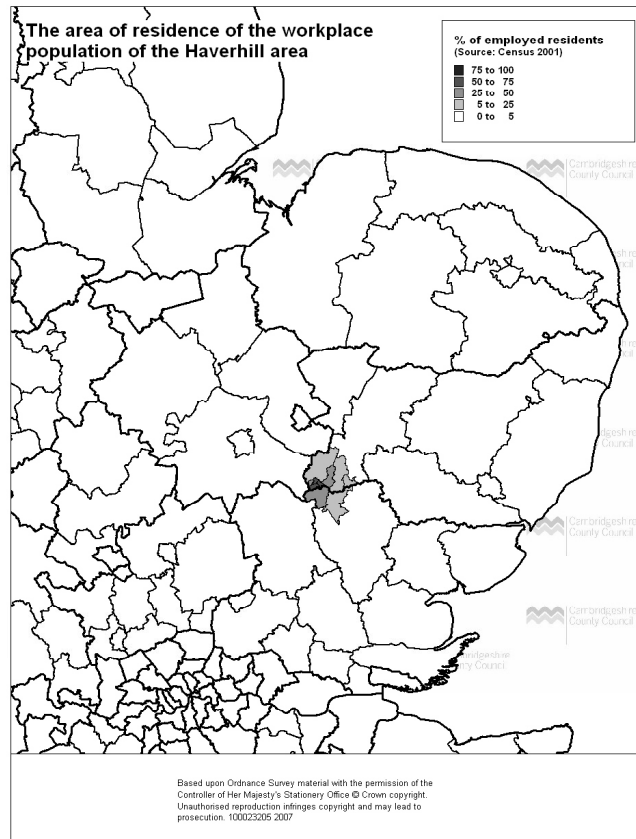
The map shows a relatively wide-ranging commuter area, including East Cambridgeshire, Kings Lynn & West Norfolk, Breckland and St Edmundsbury. With an armed forces base a significant element of commuting is determined by the location of housing for military personnel. All surrounding Districts have wards 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

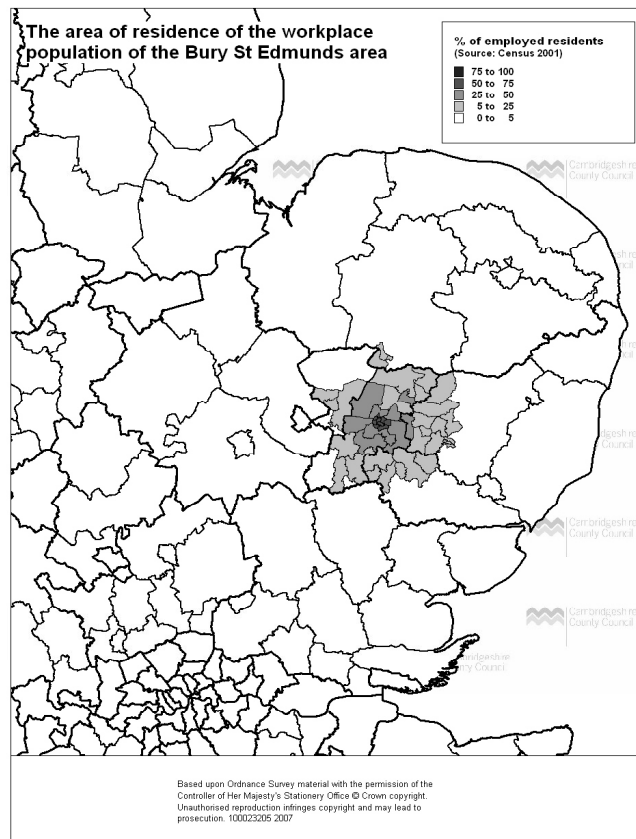
▪ Haverhill

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

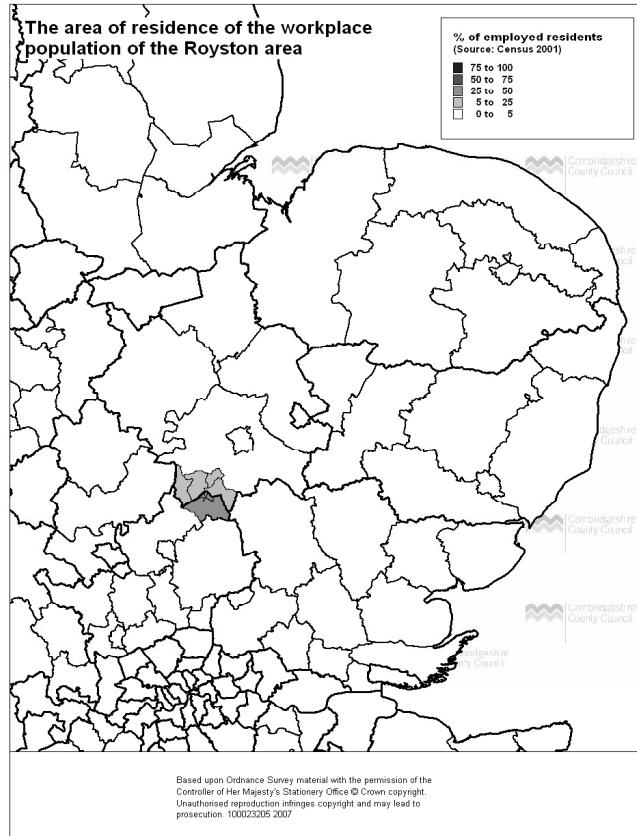
Bury St Edmunds is one of the largest towns in the sub-region. As the map shows, there is a significant labour market associated with the town. However, there is only one ward outside of St Edmundsbury Borough which contributed 25% or more of its employed residents to the town's workforce. Most other '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

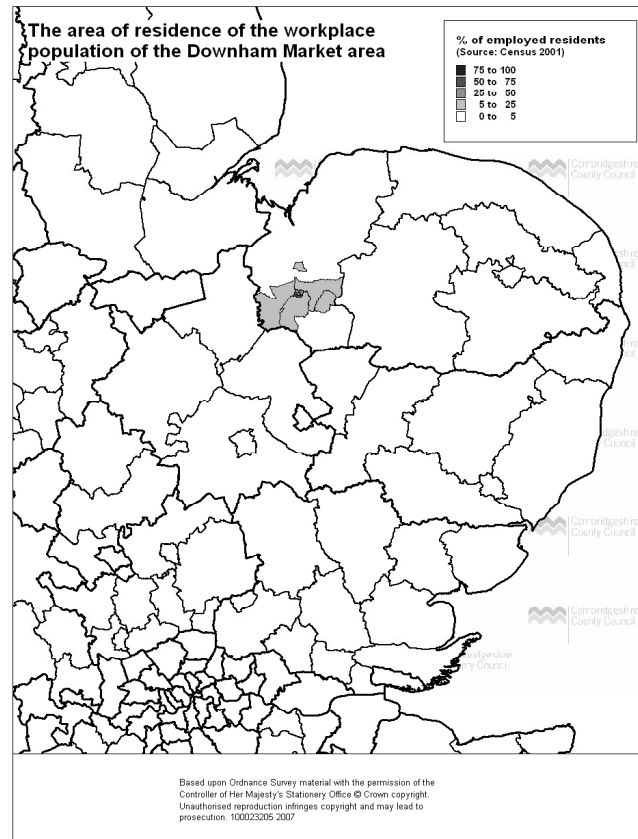
▪ Royston (North Hertfordshire)

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.



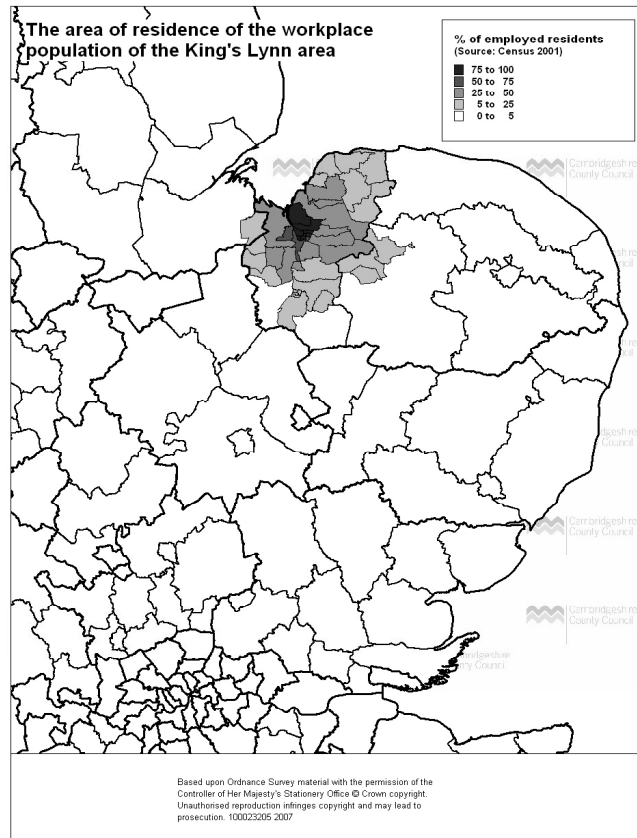
▪ **Downham Market (Kings Lynn & West Norfolk)**

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.



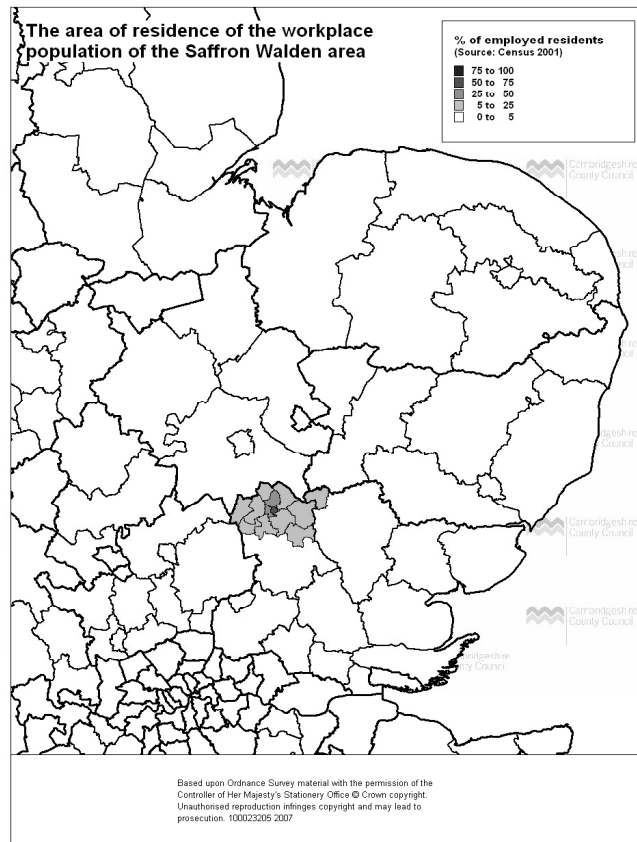
▪ **Kings Lynn (Kings Lynn & West Norfolk)**

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

Ward	District	% Employed Residents working in London 2001
Whittlesford	South Cambridgeshire	8.6%
The Mordens	South Cambridgeshire	7%
Ellington	Huntingdonshire	6.8%
Huntingdon West	Huntingdonshire	6.8%
Fowlmere & Foxton	South Cambridgeshire	6.6%
Petersfield	Cambridge City	6.2%
Orwell & Barrington	South Cambridgeshire	6.1%
Melbourn	South Cambridgeshire	5.8%
Meldreth	South Cambridgeshire	5.7%
Kimbolton & Staughton	Huntingdonshire	5.7%
St Neots Priory Park	Huntingdonshire	5.7%
Gransden & the Offords	Huntingdonshire	5.3%
Duxford	South Cambridgeshire	5%
Gamlingay	South Cambridgeshire	5%

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

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

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

12UEGQ 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
12UDGG Delph
12UDGL Kingsmoor
12UDGN Lattersey
12UDGY St Andrews
12UDGZ St Marys

Wisbech

12UDGF Clarkson
12UDGK Hill
12UDGM Kirkgate
12UDGT Medworth
12UDGW Peckover
12UDGX Roman Bank
12UDHB Staithe
12UDHD Waterlees
33UEJH Walton

March

12UDGQ 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
33UEHQ North Lynn
33UEHR North Wootton
33UEHS Old Gaywood
33UEHX St Margarets with St Nicholas
33UEHZ South and West Lynn
33UEJB South Wootton
33UEJD Springwood

Newmarket

42UCFR All Saints
42UCFW Exning
42UCGD St Mary's
42UCGE Severals

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
42UFHF Minden
42UFHG Moreton Hall
42UFHH Northgate
42UFHL Risbygate
42UFHN St Olaves
42UFHP Southgate
42UFHR Westgate

Saffron Walden

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