

Chapter 1: Demography and Households

Table of Contents

Key findings.....	4
Recommendations	6
1. Introduction	7
2. Methodology.....	7
2.1. Housing development classifications	8
2.2. Current developments	11
2.3. Older developments.....	11
2.4. Future developments	12
3. Demographics by development type	12
3.1. Age structure.....	13
3.2. Ethnicity	15
3.3. Birth rates	17
3.4. General Health.....	17
4. Wider determinants of health by development type.....	18
4.1. Education.....	18
4.2. Employment status	19
4.3. Socio-economic classification (NS-SEC).....	20
5. Household characteristics by development type	22
5.1. Household size	22
5.2. Household composition	23
5.3. Type of accommodation.....	24
5.4. Tenure.....	24
5.5. Occupancy.....	25
6. New developments.....	26
6.1. Who moves to new developments?.....	27
6.2. How do new developments evolve over time?.....	29
6.3. Housing Needs of Specific Groups.....	30
7. Housing affordability.....	32
8. Forecasts	35
8.1. Population forecasts	35
8.2. Dwellings	41

9. Considerations in meeting the health and wellbeing of people new communities	41
Appendix 1: Methodology for determining types of development	45

Figures

Figure 1: Cambridgeshire and Peterborough housing developments, March 2024..	10
Figure 2: Population by development type, age band, 2021	13
Figure 3: Age profile by type of development, 2021	13
Figure 4: Age structure by district, new developments, 2021	14
Figure 5: High level ethnic group and development type, 2021.....	15
Figure 6: High level ethnic group, New Developments, 2021	16
Figure 7: General health (self-reported) by development type, 2021	17
Figure 8: Qualifications, housing development type, 2021	19
Figure 9: Qualifications, new developments, 2021	19
Figure 10: Employment status (excluding retired residents), new developments, 2021	20
Figure 11: National Statistics Socio Economic Classification (NS-SEC), 2021	21
Figure 12: National Statistics Socio Economic Classification (NS-SEC), new developments, 2021	21
Figure 13: Household composition by development type, 2021	23
Figure 14: Accommodation type, new developments, 2021	24
Figure 15: Tenure by development type, 2021	24
Figure 16: Occupancy rating, bedrooms, 2021	25
Figure 17: Occupancy rating, bedrooms, new developments, 2021	26
Figure 18: Areas migrated from to new developments	27
Figure 19: Population changes in new housing developments, 2011 and 2021	29
Figure 20: Proportion of population by older development site, 2021	30
Figure 21: Trend in national affordability ratios.....	33
Figure 22: Median house prices to median income, ratios, year to September 2023	34
Figure 23: Average house price per square metre, July to December 2023.....	34
Figure 24: Average house price per square metre, July to December 2023.....	35
Figure 25: Population forecasts, Cambridgeshire, mid 2022-based.....	36
Figure 26: Population forecasts, Peterborough, 2022 to 2031	37
Figure 27: Population forecasts by district, mid 2022-based	37
Figure 28: Cambridgeshire and Peterborough population forecasts, change between 2022 and 2031, numbers	39
Figure 29: Cambridgeshire and Peterborough population forecasts, change between 2022 and 2031, proportions	40
Figure 30: Dwelling forecasts, change between 2022 and 2031, mid 2022 based...	41

Tables

Table 1: Definition of development type.....	8
Table 2: New developments, planned dwellings and completions, 2023.....	11

Table 3: Older developments, planned dwellings and completions, 2023	11
Table 4: Future new developments, planned dwellings, completions and status, 2023	12
Table 5: Birth rate per 1,000 females aged 15 to 44 years, September 2020 to August 2023	17
Table 6: Average household size per household, Cambridgeshire and Peterborough only, 2021	22
Table 7: Affordable housing per year, 2020 to 2040	31
Table 8: Type of older person accommodation up to 2040	31
Table 9: Median house price to median income ratios, year to end September 2024	33
Table 10: New developments compared to settled areas, service implications	41

Key findings

Development classification

- For the purposes of this JSNA, the following classification of developments has been used:
 - New: Substantial build undertaken between 2011 and 2021
 - Older: Majority of build was before 2011
 - Future: Build is currently limited or not yet started
- Currently there are 15 large new development sites across Cambridgeshire and Peterborough, with Northstowe (South Cambridgeshire), Alconbury Weald (Huntingdonshire) and Wintringham Park (Huntingdonshire) being the largest.
- There are a further 15 sizeable sites planned or proposed for future development, with the largest (where planning has been approved) being Waterbeach New Town (South Cambridgeshire) and Great Haddon (Peterborough).

Demographics by development type

- New housing developments across Cambridgeshire and Peterborough generally have a younger, more ethnically diverse population living in them, who have higher levels of educational attainment, employment, and good health than more settled populations. As these new developments age, their demographics become more similar to those of more settled areas.
- The demographic differences seen in new developments have implications for the services required to meet their health and care needs. These services must be prepared for an overall younger population, including the high proportion of children and young people and high birth rates.

Households in new developments

- The average household size in new developments is over 10% higher than in settled areas. This is a significant factor to consider when planning the provision of services and amenities for a new development. For example, for every 1,000 households built in a new development, consideration needs to be given for at least 300 additional people than would be expected if using the average household size for all housing types.
- Households in new developments have a higher proportion of ownership with a mortgage compared to settled areas, and conversely a lower proportion of outright ownership. Social renting is also higher, likely to be driven by affordable housing policies.

Who moves to a new development?

- Around two-thirds of people who move into new developments do so from within Cambridgeshire and Peterborough, with relatively low external and international migration.
- The biggest draws to a new development are the design/appearance of properties, liking the idea of living in a new development and the price/affordability.
- However, satisfaction with local amenities in new developments is low, especially relating to poor access to retail shops, supermarkets, and healthcare facilities.

Affordability

- Affordability varies widely across Cambridgeshire and Peterborough, when comparing median house prices to median income, with affordability highest in the north (Fenland and Peterborough) and lowest in the south, most notably in Cambridge. Likewise, new dwellings are less affordable than existing dwellings.

Population forecasts

- The population of Cambridgeshire is forecast to increase by 11.5% (79,600 people) to 2031, with decreases expected in 5 to 14 year olds and in people in their fifties, set against notable increases in all other adult age bands. As a result of the considerable planned new housing, the number of babies and children aged under 5 years are also forecast to substantially increase.
- The population of Peterborough is forecast to increase by 7.5% (16,400 people) to 2031, with considerable changes expected in the overall age structure. Decreases are expected in under 15 year olds, most notably in 5 to 9 year olds. Increases are forecast in all other ages and are most marked in young people aged 15 to 19 years, people in their forties and people aged 65 years and over. The wards predicted to see the largest demographic growth across Cambridgeshire and Peterborough are associated with housing developments.

Recommendations

1.1	System partners should account for the differences in demographic profiles between new and existing communities.
1.2	To facilitate informed service commissioning and provision, system partners should develop an integrated approach to compiling a single electronic resource of data related to major new developments across Cambridgeshire and Peterborough.
1.3	Local planning authorities and ICS commissioners should ensure correct housing multipliers are applied, accounting for the higher number of people per home in new developments compared with existing communities.
1.4	Local Plans and Housing strategies should plan for a mixture of accommodation types, according to population projections and likely demographic profile changes. These strategies should ensure that future health needs will be addressed through appropriate provision of accessible housing and care facilities (e.g., for older people, learning disability, physical disabilities, autism and specialist mental health, social care, etc).
1.5	Local Plans should, where possible, include a policy requiring major, mixed-use new developments to co-locate housing with local employment opportunities.
1.6	System partners should develop an integrated approach for addressing the higher rates of mild-to-moderate mental illness in new communities.

1.Introduction

Understanding changes in demography, past and future, helps to determine the needs for service provision. The size of the population and characteristics such as age, ethnicity and deprivation affect the demand for health and social care, voluntary services, and other services.

In new developments, which tend to be a relatively young population with higher birth rates, higher proportions of children and lower long-term health conditions, the service needs are different to those living in more settled areas, where there may be an ageing population, higher levels of relative deprivation and lower healthy lifestyle behaviours.

The last ten years have seen substantial growth across Cambridgeshire and Peterborough, particularly in the cities of Cambridge and Peterborough; both of which experienced more than 17% increase in population between 2011 and 2021, amongst the highest in England. Substantial growth was experienced across all age groups in both areas: most notably in children, young people and older people in Peterborough and children, young people and working age adults in Cambridge. There is an ageing population, and all districts experienced large proportional increases in their older adult population (65 years and over) between 2011 and 2021. The recent overarching JSNA for Cambridgeshire and Peterborough explores this in more detail.¹

This chapter explores the population and household characteristics of people living in new housing developments across Cambridgeshire and Peterborough and compares these to the population in more established, settled areas. The majority of the analyses concentrate on known housing developments where there are more than 300 dwellings planned. However, it important to be mindful of smaller developments within settled towns and villages and the impact that these can have on the community and service provision within the area, such as school places and health services.

An interactive dashboard has been created to support this chapter, available at <https://cambridgeshireinsight.org.uk/healthy-places-jsna/>. The dashboard presents demographic and household data on people living in each of the development categories shown in Table 1.

2.Methodology

Geographically, each of the 2,804 Census Output Areas in Cambridgeshire and Peterborough Integrated Care System (ICS) were assigned to one of the housing categories used in this JSNA (Table 1), dependent on the majority of house build type in that area or to enable a comparison of change over time across a consistent geographical area. These were then grouped to enable comparisons between the different types of development. Output Areas are the lowest geographical area for Census statistics and cover around 125 households.

There was not a perfect fit between Census geographies and the planning boundaries of new developments, so a best fit methodology was used as an approximation. In some cases, an output area spanned more than one development, for example where developments are close or neighbouring such as Loves Farm and Wintringham Park. Likewise, some of the output areas classified as ‘new development’ may include some settled population. Appendix 1 presents the detailed methodology that was used.

The majority of the analysis in this chapter concentrates on the Census 2021 which, although being three years old now, is a comprehensive, robust dataset that is available at a low geographical area. There will have been notable continued new housing growth over the last few years, but the key messages found in this chapter are likely to remain the same and are consistent with previous analysis undertaken.

The Cambridgeshire County Council’s Policy & Insight Team annual population and dwelling forecasts, based on trends in births, deaths and migration, along with known housing developments from district Local Plans, are also included. These forecasts are more valuable for planners than the nationally produced projections, which are essentially based on historic population trends and do not include growth for new housing developments.

The Cambridgeshire and Peterborough Overarching JSNA 2023 provides a wealth of data and information on the health and wellbeing of local residents.¹ This web-based JSNA includes interactive dashboards relating to demography, life expectancy, deprivation, disease prevalence and groups at risk of inequality. It also recommends that public services need to respond to the large, predicted population growth and changing age structures, both of which are pertinent to this JSNA.

There are further health and social care datasets that can be used to assess the health and wellbeing of a population, such as the prevalence of health conditions in primary care, hospital emergency attendances and admissions, referrals to children’s social care, births and causes of deaths, to name a few.

In this chapter Cambridgeshire and Peterborough relates to the resident based population of Cambridgeshire and Peterborough Integrated Care System (ICS) i.e. Cambridgeshire, Peterborough and Royston in Hertfordshire, unless otherwise stated.

2.1. Housing development classifications

For the purposes of this chapter a **new development** has been classified as an area where notable build started **between 2011 and 2021**. An **older development**, to enable tracking changes over time, is where there was substantial new build **before 2011** and areas of **future development** where build has been **limited** or **not yet started**. All other housing is defined as ‘**settled areas**’.

Table 1: Definition of development type

Development type	Definition
New	Substantial build undertaken between 2011 and 2021

Older	Majority of build was before 2011
Future	Build is currently limited or not yet started
Settled areas	All other areas (includes future developments)

Source: Policy & Insight Team, Cambridgeshire County Council

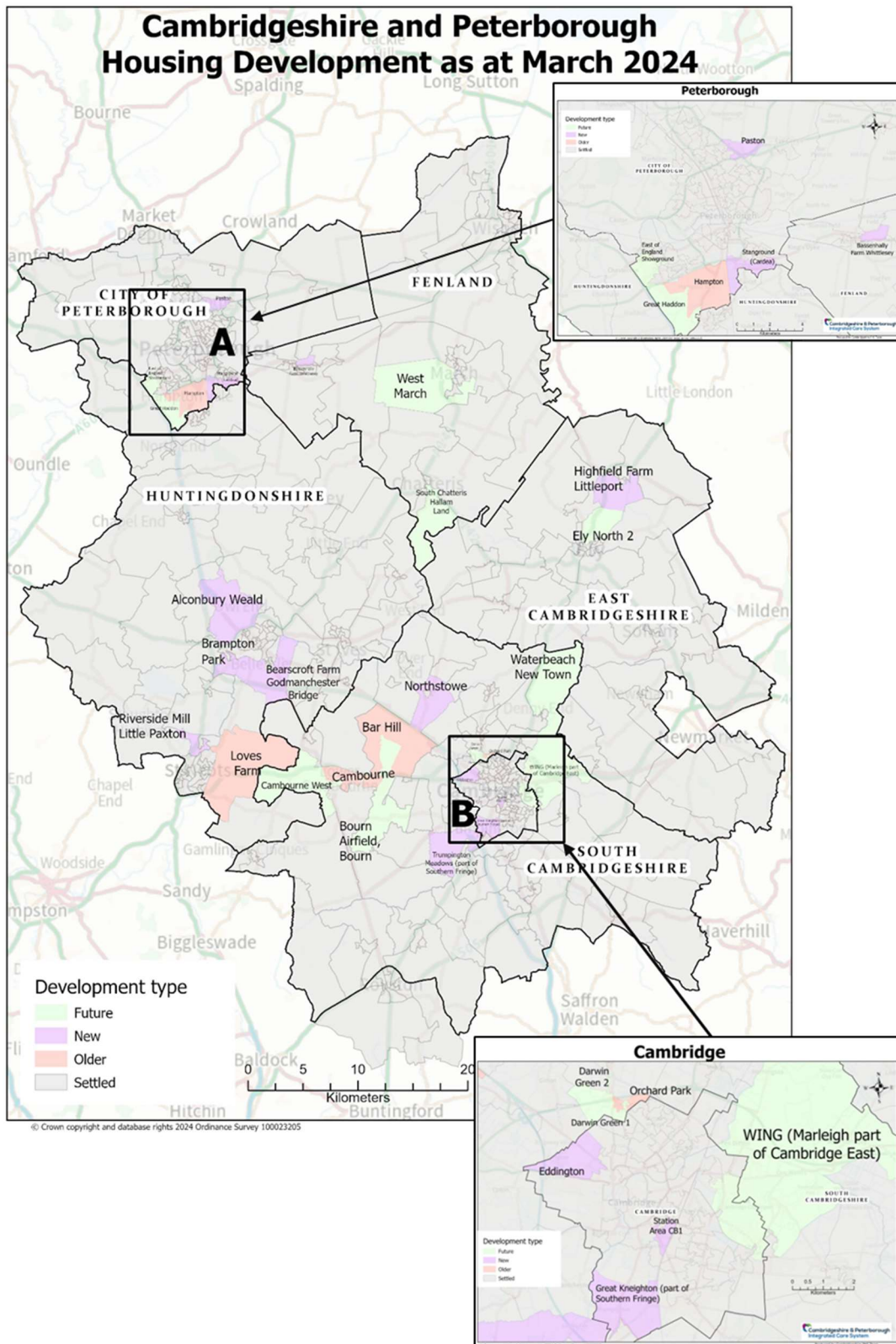
Using these approximate classifications around 3.0% of Cambridgeshire and Peterborough’s population live in new housing developments, 4.2% in older developments, 1.2% in areas of known future development and the remaining 91.6% live in settled areas.

It is important to note that this is a snapshot in time and that not all developments fit neatly into these classifications. For example, Cambourne is an older development, but build has recently started in the adjoining Cambourne West. Likewise, growth continues at other established sites, such as The Hamptons in Peterborough and Loves Farm in Huntingdonshire.

The categorisation is based on planning data that was available at the time of analysis and therefore susceptible to change. Whilst these classifications are approximate, they are considered robust enough to enable comparisons between the development types at the combined Cambridgeshire and Peterborough level.

Figure 1 shows these classifications geographically, with more detail, including completion rates, in the next section.

Figure 1: Cambridgeshire and Peterborough housing developments, March 2024



Source: Classifications provided by Cambridgeshire County Council's Policy & Insight Team

2.2. Current developments

There are currently 15 sites classed as new developments across Cambridgeshire and Peterborough i.e. where notable build started between 2011 and 2021. Some sites completed during this time, whilst others remain under development.

Table 2: New developments, planned dwellings and completions, 2023

Area	Development	Approximate planned dwellings (maximum)	Status	Approximate dwellings completed by 2023
Cambridge	Eddington*	3,000	First completions in 2017	1,050
	Clay Farm / Great Kneighton (part of Southern Fringe)	2,200	Completed development	2,200
	Darwin Green (NIAB) *	1,700	First completions in 2010	500
	Station Area CB1	350	Completed development	350
	Trumpington Meadows (part of Southern Fringe) *	1,200	Almost complete	1,150
East Cambridgeshire	Highfield Farm Littleport	650	Almost complete	650
Fenland	Bassenhally Farm Whittlesey	450	First completions in 2016	350
Huntingdonshire	Alconbury Weald	5,000	First completions in 2017	850
	Bearscroft Farm Godmanchester Bridge	900	First completions in 2017	800
	Brampton Park	600	Almost complete	600
	Riverside Mill Little Paxton	700	First completions in 2010	600
	Wintringham Park	2,800	First completions in 2020	350
South Cambridgeshire	Northstowe	10,000	First completions in 2017	1,400
Peterborough	Paston	900	First completions in 2009	800
	Stanground (Cardea)	1,850	Completed development	1,850

Source: Policy & Insight Team, Cambridgeshire County Council. Rounded to nearest 50.

*Trumpington Meadows and Eddington span both Cambridgeshire and South Cambridgeshire but are included in Cambridge for analysis

Over 34,000 dwellings are classed as new developments across Cambridgeshire and Peterborough, with Northstowe (South Cambridgeshire), Alconbury Weald (Huntingdonshire) and Wintringham Park (Huntingdonshire) being the largest sites. It is estimated that almost 40% of planned new dwellings, as identified in this analysis, had been completed by the end of 2023.

2.3. Older developments

Five older developments, shown in Table 3, were used as a comparator for new developments. These developments had substantial build started before 2011, with The Hamptons in Peterborough and Cambourne in South Cambridgeshire being the largest sites.

Table 3: Older developments, planned dwellings and completions, 2023

Area	Development	Approximate planned dwellings (maximum)	Status	Approximate dwellings completed by 2023
Huntingdonshire	Loves Farm	1,500	First completion in 2008 - almost complete	1,450
Peterborough	Hampton	8,050	First completions in 1997	6,150
South Cambridgeshire	Bar Hill	1,800	Started in 1965, completed	1,800
	Cambourne	4,300	Started in 1998, development is completed	4,300
	Orchard Park	1,200	First completions in 2007	1,050

Source: Policy & Insight Team, Cambridgeshire County Council

2.4. Future developments

There are currently 15 larger sites planned or proposed for future development (where build has been limited or not yet started) across Cambridgeshire and Peterborough. Some of the future developments are expansions to older developments, such as Cambourne.

Over 44,000 dwellings are proposed in these sites, with Waterbeach New Town in South Cambridgeshire (11,000 dwellings) and Great Haddon in Peterborough (5,350 dwellings) being the largest development sites where planning permission has been granted. Another large site, North East Cambridge, has yet to be approved but has a proposed 8,000 dwellings.

Table 4: Future new developments, planned dwellings, completions and status, 2023

Area	Development	Approximate planned dwellings (maximum)	Status	Approximate dwellings completed by 2023	Included in JSNA analysis
Cambridge	N Cherry Hinton Cambridge (part of Cambridge East)	1,200	Construction began in 2023	0	Yes
East Cambridgeshire	Ely North 2	3,000	First completions in 2019	400	Yes
Fenland	South Chatteris Hallam Land	1,000	Outline planning submission	0	Yes
	East Wisbech	900	Local Plan strategic allocation	0	No
	West March	2,000	Local Plan strategic allocation	0	Yes
Huntingdonshire	Loves Farm phase 2	1,000	Outline planning permission	0	No
South Cambridgeshire	Bourn Airfield, Bourn	3,500	Outline planning application	0	Yes
	Cambourne West	2,350	First completions in 2022	350	Yes
	North East Cambridge	8,000	Area Action Plan. Proposed.	0	No
	Darwin Green (NIAB) 2 & 3	1,000	Local Plan strategic allocation	0	Yes
	Waterbeach New Town	11,000	First completions in 2023	<50	Yes
	WING (Marleigh part of Cambridge East)	1,300	First completions in 2021	300	Yes
Peterborough	East of England Showground	650	Outline planning application	0	Yes
	Great Haddon	5,350	First completions in 2023	<50	Yes
	Norwood	2,000	Outline planning application	0	Yes

Source: Policy & Insight Team, Cambridgeshire County Council

Note: Norwood overlaps with Paston and has been included in the new development analysis.

The average household size in new developments is higher than the average household size in settled areas (Section 5.1). To give an indicative population scale of these planned developments, if the new development household multiplier is applied to the planned number of new dwellings, it can be expected that there will be over 117,000 people living in these new developments that will need access to health, social, voluntary and community services, as well as amenities such as shops, leisure and transport.

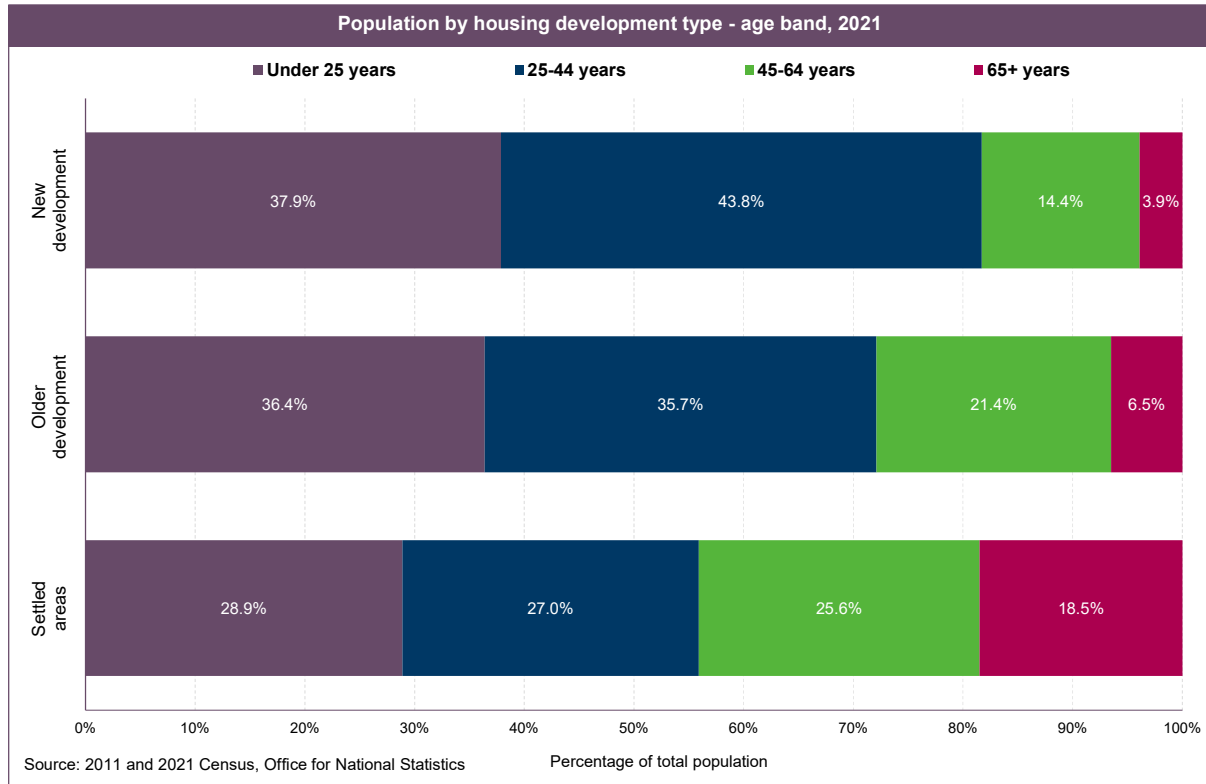
3. Demographics by development type

This section examines the differences between age structures, ethnicity, birth rates and health status by the types of housing development across Cambridgeshire and Peterborough.

3.1. Age structure

The population of people living in new developments is skewed to younger age bands. In 2021 over 80% of the population living in new developments were aged under 45 years, compared to a 72% in older developments and a 56% in settled areas.

Figure 2: Population by development type, age band, 2021

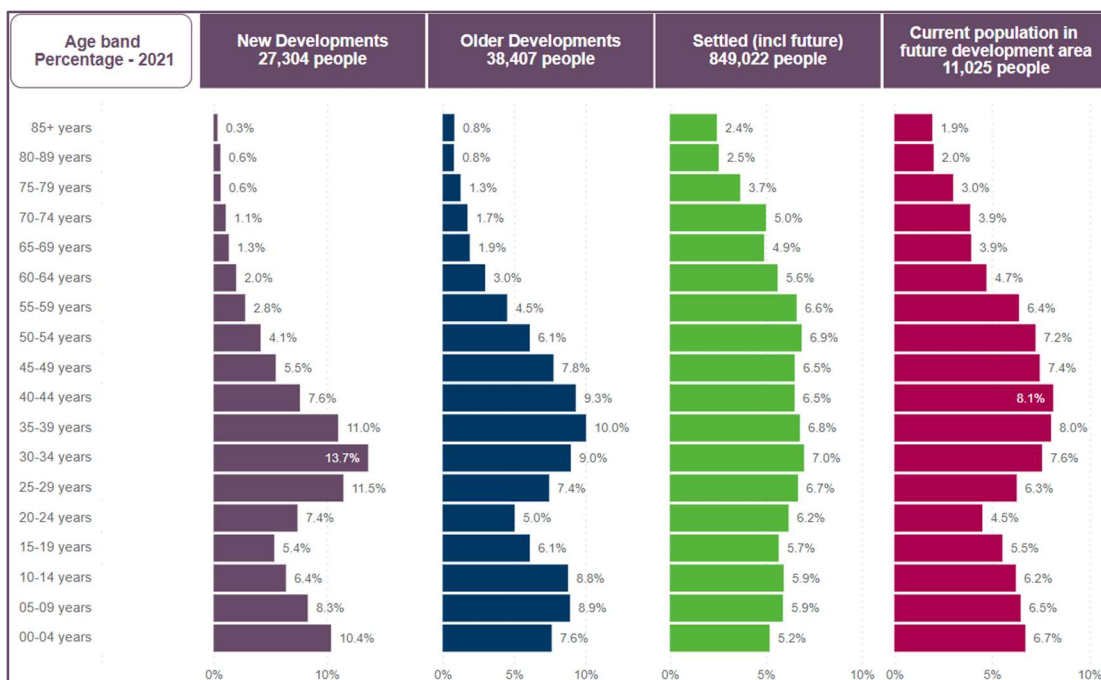


Source: Healthy Places JSNA dashboard, based on Census 2021

There is also a high proportion of under 5 year olds in new developments (10.4%) compared to older developments (7.6%), both of which have higher proportions than settled areas (5.2%). Overall, new developments have double the proportion of pre-school aged children than those in settled areas.

Both new and older developments have relatively low proportions of older adults; 3.9% of the population in new developments were aged 65 years and over, 6.5% in older developments and 18.5% in settled areas. Similarly, the number and proportion of people aged 85 years and over is very low in new developments.

Figure 3: Age profile by type of development, 2021



Source: Healthy Places JSNA dashboard, based on Census 2021

Whilst the population of new developments is younger than those in settled areas, this remains the case as new developments age. However, the population in older developments also have higher proportions of 10 to 14 year olds and 45 to 54 year olds compared to new developments, suggesting that older developments mature with time.

The age structure of new developments is consistent across all districts, with higher proportions of younger populations and lower proportions of older populations. Figure 4 shows the age profile of new developments in each district. Whilst all areas show similar patterns of younger populations, Cambridge has a relatively low proportion of children aged under 5 years (8.7% compared to 10.4% in all new developments). However, this is also true in their general population, with Cambridge having a low proportion of pre-school aged children (4.3% compared to 5.5% across Cambridgeshire and Peterborough).

In general, districts have double the proportion of under 5 year olds living in new developments compared to their underlying population.

Figure 4: Age structure by district, new developments, 2021

Category	Cambridge	East Cambridgeshire	Fenland	Huntingdonshire	Peterborough	South Cambridgeshire	Total
85+ years	0.3%	0.4%	1.5%	0.3%	0.2%	0.5%	0.3%
80-89 years	0.9%	0.2%	1.3%	0.5%	0.2%	0.5%	0.6%
75-79 years	0.6%	0.5%	1.5%	0.8%	0.5%	0.6%	0.6%
70-74 years	0.9%	1.1%	1.7%	1.6%	0.8%	1.0%	1.1%
65-69 years	1.2%	1.7%	1.5%	1.8%	1.2%	1.0%	1.3%
60-64 years	1.9%	2.4%	1.5%	2.9%	1.6%	1.8%	2.0%
55-59 years	2.6%	2.4%	3.5%	3.6%	2.6%	2.6%	2.8%
50-54 years	3.9%	5.9%	4.6%	4.6%	3.7%	4.2%	4.1%
45-49 years	5.3%	7.2%	4.3%	5.7%	5.4%	5.6%	5.5%
40-44 years	7.4%	7.7%	4.8%	7.1%	8.3%	8.2%	7.6%
35-39 years	10.7%	10.7%	8.5%	10.1%	11.2%	13.5%	11.0%
30-34 years	14.0%	11.5%	12.9%	14.2%	13.1%	14.0%	13.7%
25-29 years	11.2%	9.7%	14.2%	11.0%	12.2%	11.6%	11.5%
20-24 years	10.8%	5.5%	7.7%	5.4%	5.2%	4.2%	7.4%
15-19 years	7.3%	5.1%	4.5%	3.5%	4.4%	3.9%	5.4%
10-14 years	5.1%	8.1%	7.4%	6.4%	8.0%	6.4%	6.4%
05-09 years	7.0%	9.0%	7.9%	8.8%	10.3%	7.9%	8.3%
00-04 years	8.7%	10.8%	10.6%	11.6%	11.1%	12.5%	10.4%

Source: Healthy Places JSNA dashboard, based on Census 2021

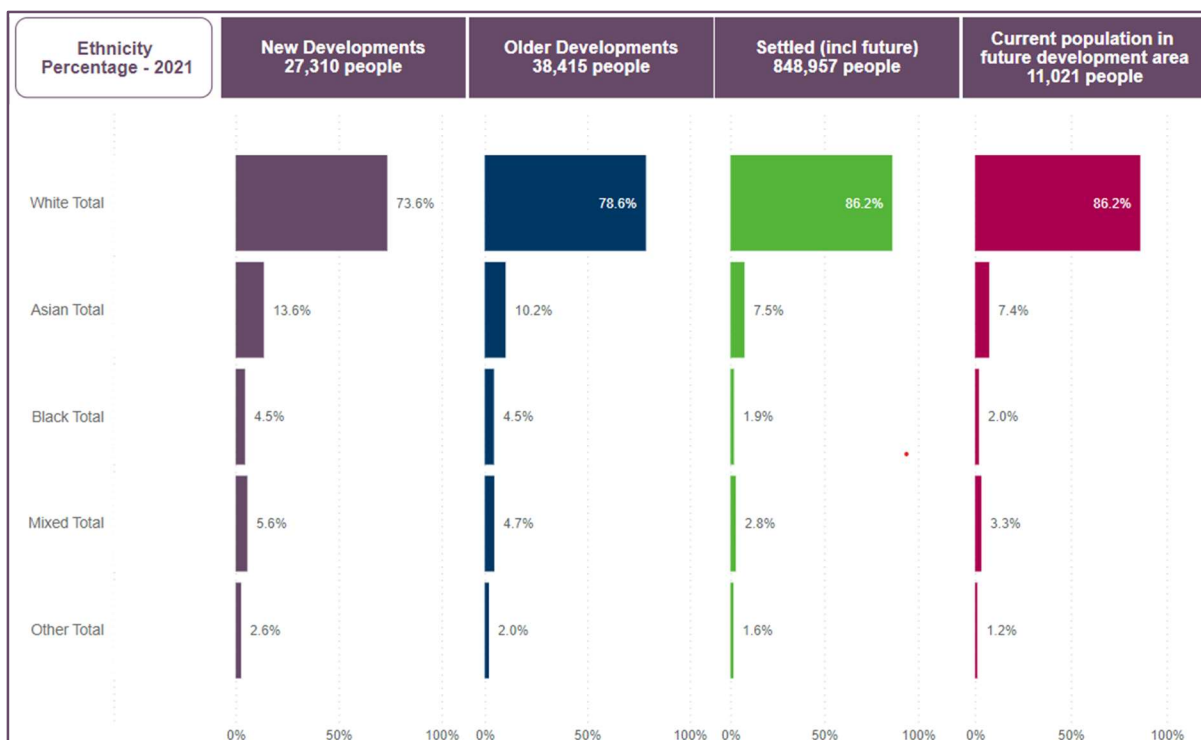
Cambridge has a high proportion of 20 to 24 year olds living in new developments (10.8%) compared to the other districts (5.2% combined). This reflects the underlying population of the city where 14.0% of the established population are aged between 20 and 24 years old, mainly due to the high resident student population.

3.2. Ethnicity

In general, new developments are more ethnically diverse than the underlying population across Cambridgeshire and Peterborough.

Figure 5 presents the proportion of population by ethnic group and type of development. At this high level it can be seen that ethnic diversity is higher in older developments, and higher still in areas of new development. Over a quarter of the population in new developments belong to a non-white ethnic group compared to a seventh in settled areas. Across Cambridgeshire and Peterborough there is a higher proportion of Asian population living in new developments compared to settled areas (13.6% compared to 7.5% respectively), but there are differences between districts and also between the more detailed ethnic groups.

Figure 5: High level ethnic group and development type, 2021



Source: Healthy Places JSNA dashboard, based on Census 2021

At a total population level Cambridge and Peterborough have relatively high levels of ethnic diversity in their areas, with around a quarter of the population from non-white ethnic groups. However, in new developments Cambridge has a higher proportion of non-white populations (38.2%) and Peterborough a lower proportion (19.6%). South Cambridgeshire also has a higher proportion of non-white populations living in new developments (30.7%) compared to the average for the district (11.0%).

Both Cambridge (22.1%) and South Cambridgeshire (19.0%) have high proportions of Asian population living in new developments compared to other areas (the average for Cambridgeshire and Peterborough is 13.6%). Overall, 14.3% of Peterborough's population are in the Asian ethnic group but only 6.8% of the population living in new developments are from the Asian ethnic group.

Figure 6: High level ethnic group, New Developments, 2021

Category	Cambridge	East Cambridgeshire	Fenland	Huntingdonshire	Peterborough	South Cambridgeshire	Total
White Total	61.8%	90.3%	92.0%	86.3%	80.4%	69.3%	73.6%
Asian Total	22.1%	3.4%	2.8%	4.6%	6.8%	19.0%	13.6%
Black Total	3.9%	2.4%	2.0%	4.0%	7.4%	3.4%	4.5%
Mixed Total	7.8%	3.4%	2.2%	4.0%	4.1%	5.7%	5.6%
Other Total	4.4%	0.6%	0.9%	1.2%	1.3%	2.6%	2.6%

Source: Healthy Places JSNA dashboard, based on Census 2021

When looking at the more detailed categories of ethnicity in new developments by far the highest proportion of residents, besides 'White UK', are in the 'Other White' ethnic group. This group includes Polish, Lithuanian, Irish, Romanian, other European countries as well as countries further afield. In Peterborough there is a notably low proportion of Pakistani population (1.9%) living in new developments compared to the total population (7.9%).

3.3. Birth rates

Unfortunately, the births data used in this section are only available at Lower Super Output Area, which cover a wider geographical area than the Output Areas that have been used throughout this chapter. This means that more of the settled population are included in the analysis than would be optimal.

Table 5 shows that birth rates in areas of new development are significantly higher than in other types of development; in some districts at over four times the birth rate of the settled areas. The difference between birth rates in Peterborough's new developments and their general population, although still notable, is lower than the Cambridgeshire districts, as Peterborough already has a relatively high birth rate in comparison.

Table 5: Birth rate per 1,000 females aged 15 to 44 years, September 2020 to August 2023

Area	New developments	Older developments	Settled (including future)	Total
Cambridge	108.2	-	27.2	31.6
East Cambridgeshire	-	-	58.5	58.5
Fenland	-	-	65.2	65.2
Huntingdonshire	169.1	-	60.8	62.1
South Cambridgeshire	224.7	56.9	55.4	58.6
Cambridgeshire	134.3	56.9	49.7	51.9
Peterborough	145.9	79.3	67.0	68.9
Total	136.0	66.3	53.8	56.0

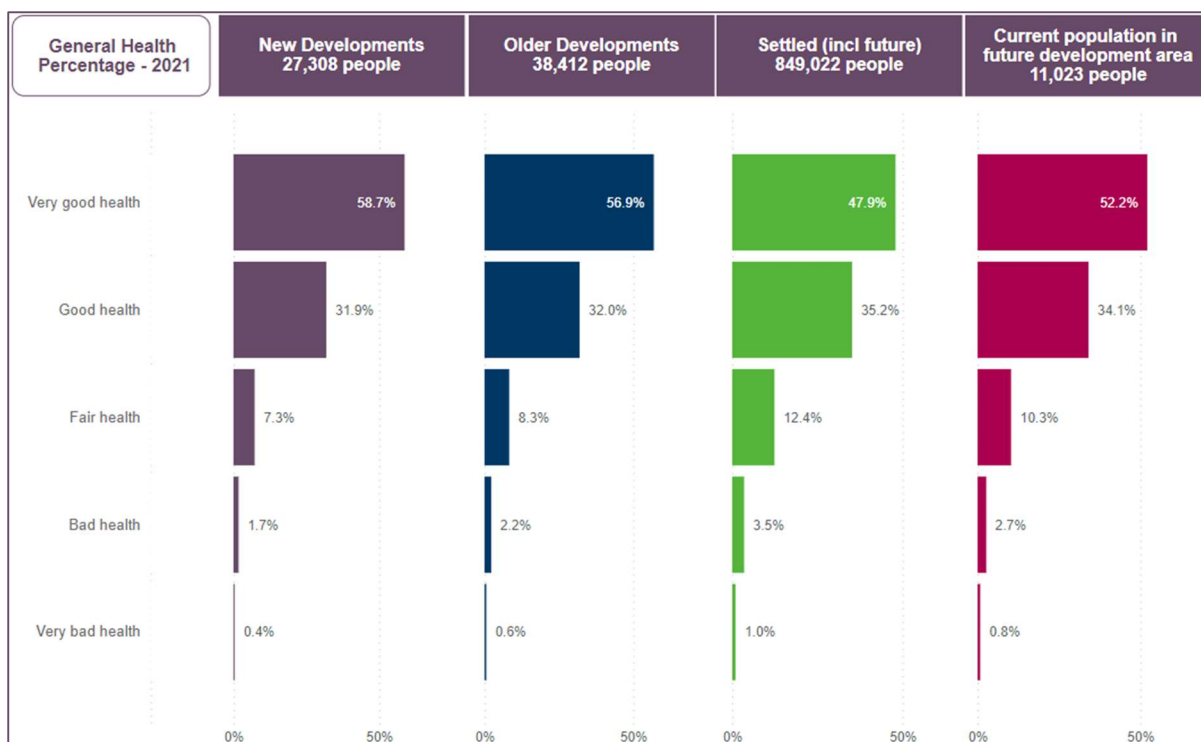
Source: DSCRO, Births table, Cambridgeshire and Peterborough ICS and Census 2021 population. Note: '-' indicates no housing of that type in the district.

3.4. General Health

In 2021, as part of the Census, residents were asked to assess their general health, ranging from very good to very bad. It is important to note that the Census was undertaken during the Covid-19 pandemic.

Self-reported health is better in residents living in new and older developments compared to residents living in settled areas, with around 9 in 10 people reporting that they were in 'good' or 'very good' health. This would be expected due to younger populations that live in these areas.

Figure 7: General health (self-reported) by development type, 2021



Source: Healthy Places JSNA dashboard, based on Census 2021

As would be expected with the predominantly younger population living in new developments, the proportion of population with a disability is low, and the proportion with no long term physical or mental health conditions high (83.1% in new developments compared to 75.8% in settled communities).

4. Wider determinants of health by development type

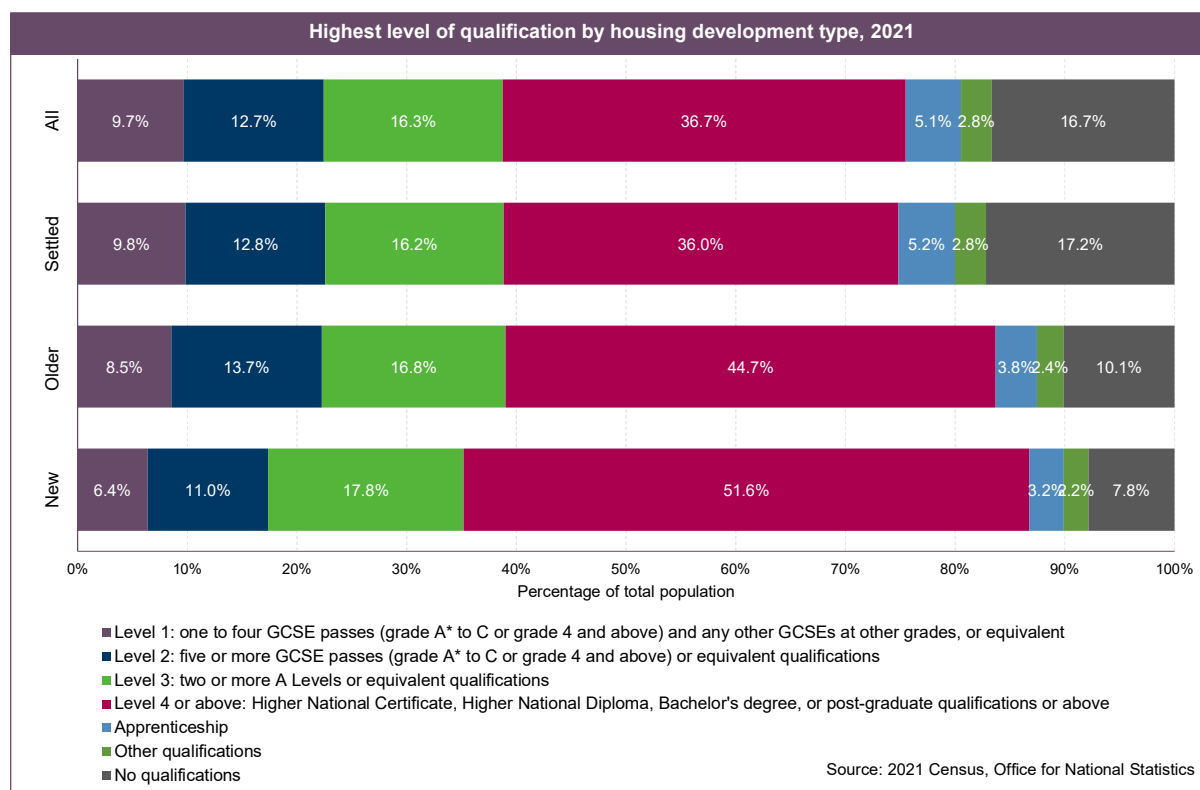
This section examines the differences in the wider determinants of health, such as education, employment and socio-economic status between the different types of housing development across Cambridgeshire and Peterborough.

4.1. Education

There is a direct link between good education and health outcomes, such as life expectancy, as well as a link to better health behaviour choices. Generally, people who live in new developments have higher educational qualifications, and at a higher level, than those in settled areas and older developments.²

In 2021, 7.8% of the population living in new developments reported having no qualifications compared to 17.2% in the settled areas and 10.1% in the older developments. Over half of people (51.6%) in new developments across Cambridgeshire and Peterborough reported having Level 4 qualifications or above (equivalent to a degree or higher, NVQ level 4 or above or professional qualifications, such as teaching or nursing). This compares to 36.0% in the settled areas and 44.7% in the older developments.

Figure 8: Qualifications, housing development type, 2021



Source: Healthy Places JSNA dashboard, based on Census 2021

New developments appear to attract people with higher levels of qualifications compared to the underling population across all districts. For example, 23.6% of people living in Peterborough’s settled areas reported having no qualifications compared to 10.6% in new developments (Paston and Cardea) and 12.5% in older developments (Hampton).

In general, the level of qualification is also higher in areas of new development compared to the settled population.

Figure 9: Qualifications, new developments, 2021

Category	Cambridge	East Cambridgeshire	Fenland	Huntingdonshire	Peterborough	South Cambridgeshire	Total
Level 1 and entry level qualifications	3.2%	10.0%	11.4%	7.8%	10.4%	5.2%	6.4%
Level 2 qualifications	6.9%	15.8%	17.3%	13.4%	16.2%	8.7%	11.0%
Level 3 qualifications	16.2%	21.2%	25.7%	20.9%	20.1%	12.3%	17.8%
Level 4 qualifications or above	64.1%	35.8%	25.8%	43.5%	34.9%	62.2%	51.6%
Apprenticeship	2.1%	5.4%	4.2%	3.6%	4.5%	2.3%	3.2%
Other qualifications	2.0%	2.4%	1.8%	1.5%	3.3%	2.1%	2.2%
No qualifications	5.4%	9.3%	13.7%	9.3%	10.6%	7.2%	7.8%

Source: Healthy Places JSNA dashboard, based on Census 2021

4.2. Employment status

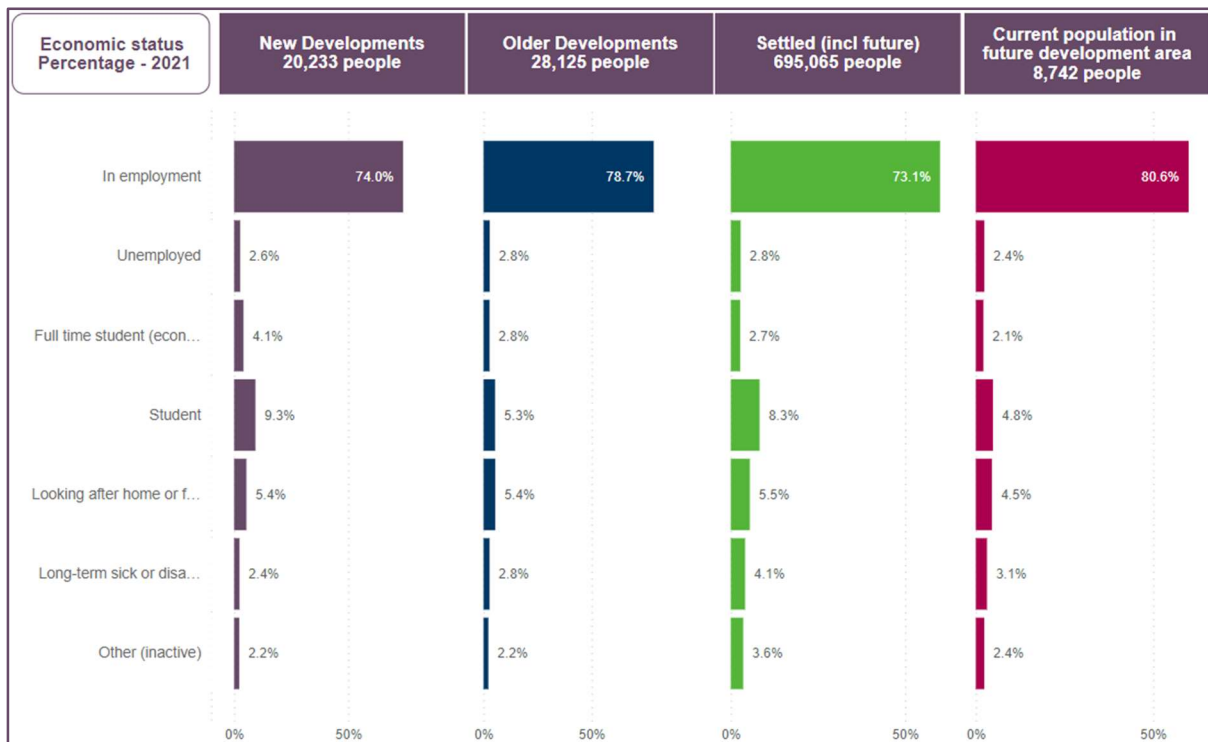
Employment rates are related to health outcomes, such as life expectancy and how many years a person can expect to live in good health. People are more likely to have lower healthy life expectancy in places with higher economic inactivity.³

The proportion of people in employment is high in areas of new development, at 70.3%, but this is distorted by the exceptionally low proportion of retired people. Retirement accounts for around a fifth of the employment status in settled populations. To allow for a more realistic comparison retired people have been excluded from Figure 10 below.

However, the data are still skewed by the large number of students in Cambridge. If students are excluded from all districts, the proportion of people in employment in new developments (85.5%) is higher than the settled areas (82.1%) and similar to older developments (85.6%).

Unsurprisingly, due to the younger age structure of new developments, the proportion of long term sick or disabled is low compared to other development types.

Figure 10: Employment status (excluding retired residents), new developments, 2021



Source: Healthy Places JSNA dashboard, based on Census 2021

4.3. Socio-economic classification (NS-SEC)

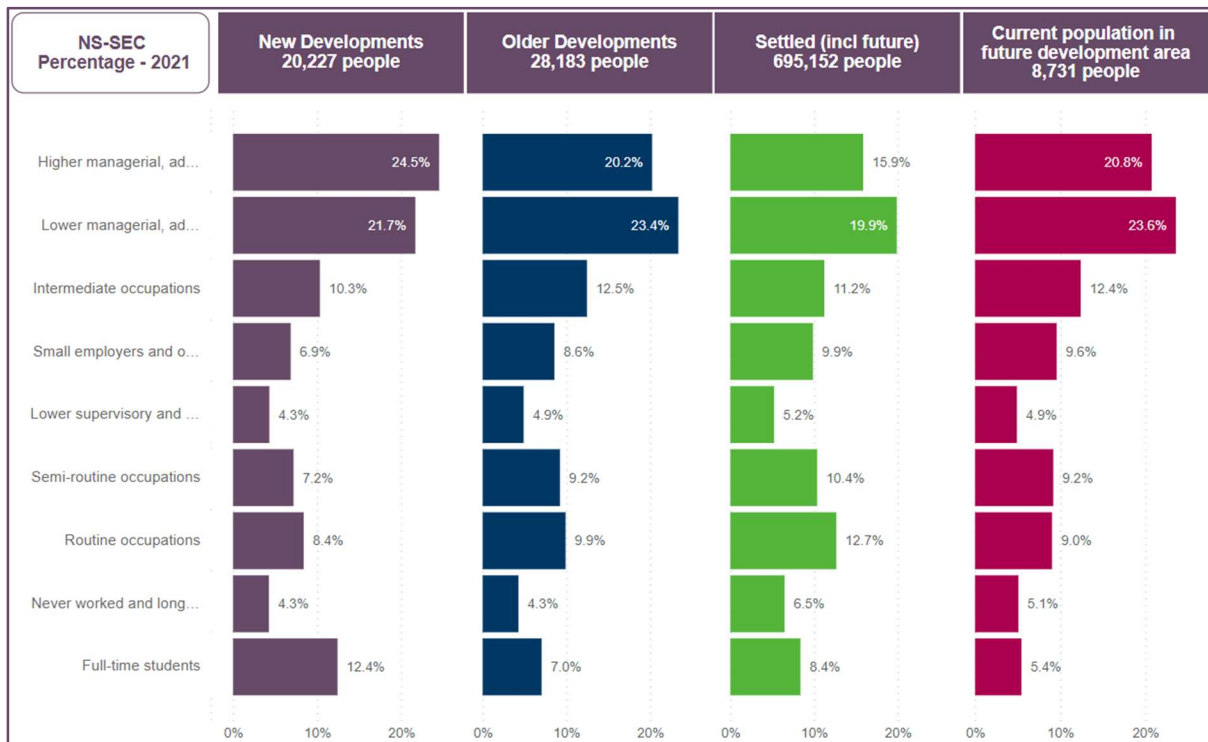
The National Statistics Socio-economic classification (NS-SEC) is a measure of employment relations and conditions of occupations. It provides an indication of socio-economic position based on occupation.

In 2021, 46.2% of the population aged 16 years and over living in new developments were in higher or lower, 'Managerial, administrative and professional' occupations, which was higher than the settled population at 35.8%. Consequently, the proportion

of people in 'Routine' or 'Semi-routine' occupations was lower at 15.6% in new developments compared to 23.1% in settled areas.

The NS-SEC proportions of the population in older developments generally lies between new and settled developments, which is an indication that older developments move towards the average in settled areas over time.

Figure 11: National Statistics Socio Economic Classification (NS-SEC), 2021



Source: Healthy Places JSNA dashboard, based on Census 2021

Cambridge and South Cambridgeshire have the highest proportions of 'Higher managerial, administrative and professional' occupations living in new developments, at almost a third of population aged 16 years and over. Cambridge is again skewed by a high proportion of students living in new developments.

Peterborough, East Cambridgeshire and Fenland have higher proportions of 'Semi-routine' and 'Routine' occupations living in new developments. These districts also have higher proportions of such workers in these occupation groups in their settled areas.

Figure 12: National Statistics Socio Economic Classification (NS-SEC), new developments, 2021

Category	Cambridge	East Cambridgeshire	Fenland	Huntingdonshire	Peterborough	South Cambridgeshire	Total
Higher managerial, administrative and professional occupations	32.0%	15.9%	11.7%	21.8%	12.5%	31.0%	24.5%
Lower managerial, administrative and professional occupations	16.8%	24.2%	23.8%	26.7%	23.5%	26.9%	21.7%
Intermediate occupations	6.7%	13.9%	14.5%	13.0%	14.6%	9.3%	10.3%
Small employers and own account workers	4.8%	8.8%	10.0%	7.8%	9.2%	6.7%	6.9%
Lower supervisory and technical occupations	2.3%	7.2%	8.8%	5.5%	6.2%	3.9%	4.3%
Semi-routine occupations	4.9%	10.4%	11.1%	7.5%	10.5%	6.5%	7.2%
Routine occupations	5.5%	10.9%	12.1%	8.6%	13.9%	6.0%	8.4%
Never worked and long-term unemployed	4.3%	3.2%	4.1%	4.8%	4.1%	4.3%	4.3%
Full-time students	22.7%	5.4%	3.9%	4.3%	5.6%	5.3%	12.4%

Source: Healthy Places JSNA dashboard, based on Census 2021

5. Household characteristics by development type

This section examines the differences between household structures in each of the housing development types, in terms of household size, composition, type of accommodation, tenure and occupancy.

5.1. Household size

Household size is an important factor when planning services for a population in areas of new housing development.

Table 6 shows that the average household size is higher in areas of new development when compared to settled areas, with an average of 2.64 - 2.69 people per new development household compared to 2.38 in settled households. This implies that consideration needs to be given for an extra 260 - 310 people per 1,000 households built than if just using the average household multiplier for settled areas.

This indicative average is likely to be on the lower side, given the methodological approach on best fit output areas and change over time which has led to the inclusion of some settled areas being included within the new development analysis, as described in Appendix 1.

It is also important to note that within this average the household size varies widely, influenced by the nature of each of the new developments. For example, in Paston (Peterborough) the average household size is 2.76 people per household.

Table 6: Average household size per household, Cambridgeshire and Peterborough only, 2021

Type	Average household size
New	2.64
Older	2.69
Settled	2.38
Key worker (new development)	1.80

Total	2.39
-------	------

Source: Healthy Places JSNA dashboard, based on Census 2021

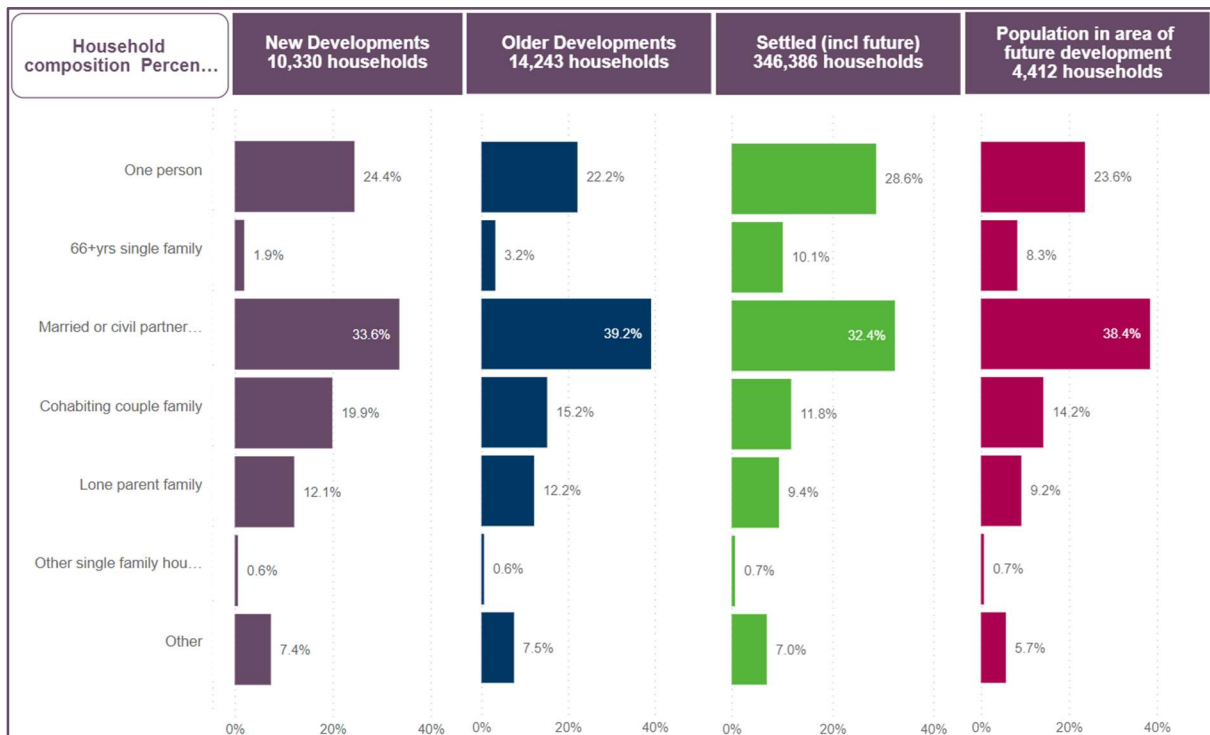
Households in new developments have a higher proportion of 3 or 4 residents (35.9%) compared to settled households (29.1%), but lower than older developments (40.5%). New developments in Cambridge have a high proportion of one person households (30.0% compared to 20.7% for all the other districts combined). This is most likely a reflection on the higher number of 1 and 2 bedroom dwellings in the city.

5.2. Household composition

Overall, the composition of households in new developments differs to that in settled areas.

Lone parent families are higher in new developments (12.1%) and older developments (12.2%) compared to settled areas (9.4%). The proportion of cohabiting couple families is also higher (19.9%) in new developments compared to older developments (15.2%) and settled areas (11.8%). Whilst those married or in civil partnerships in new developments (33.6%) is similar to settled areas (32.4%) but lower than older developments (39.2%). As would be expected with the known demography of new developments, the proportion of single families aged 66+ years is notably low.

Figure 13: Household composition by development type, 2021



Source: Healthy Places JSNA dashboard, based on Census 2021

The most notable differences between lone parent families living in new developments and those in settled areas are in Huntingdonshire (14.4% new; 8.8% settled), Cambridge (11.2% new, 7.8% settled) and South Cambridgeshire (10.7% new, 7.7% settled).

5.3. Type of accommodation

Around a third of new development dwellings in Cambridgeshire and Peterborough are flats or tenements. This is heavily skewed by Cambridge, where there were almost 2,500 flats/tenements in new developments (61.5% of all types of new dwellings in the area). In fact, of all new dwellings in areas of new development across Cambridgeshire and Peterborough, a quarter were flats or tenements in Cambridge. There were also notable proportions of flats or tenements in Huntingdonshire (26.1% of all accommodation types) and South Cambridgeshire (21.2% of all accommodation types).

When looking at other types of house build (excluding flats or tenements), South Cambridgeshire had the highest proportion of detached houses, Fenland and Peterborough the highest proportion of semi-detached houses and Cambridge the highest proportion of terraced accommodation. However, in terms of numbers Peterborough had the highest number of new detached and semi-detached properties and the second highest number of terraced properties (Cambridge had the highest).

Figure 14: Accommodation type, new developments, 2021

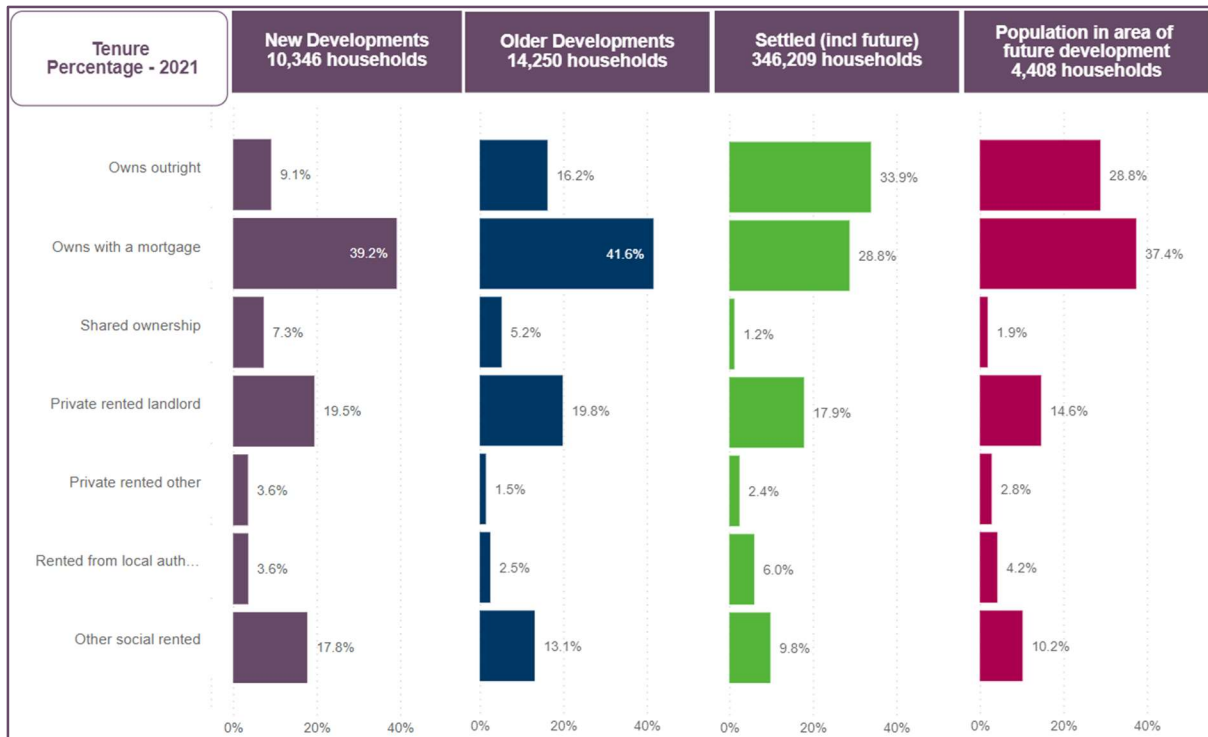
Indicator	Cambridge	East Cambridgeshire	Fenland	Huntingdonshire	Peterborough	South Cambridgeshire	Total
Detached	6.7%	24.7%	28.6%	28.7%	30.0%	33.7%	20.8%
Semi-detached	11.0%	37.9%	45.0%	28.2%	42.2%	31.2%	26.1%
Terraced	19.6%	29.7%	17.3%	15.4%	23.6%	13.0%	19.4%
Flats/tenement	61.5%	7.1%	7.9%	26.1%	3.6%	21.2%	32.6%
Other accommodation	1.1%	0.7%	1.2%	1.7%	0.5%	0.8%	1.0%

Source: Healthy Places JSNA dashboard, based on Census 2021

5.4. Tenure

New and older developments have higher proportions of residents owning houses with a mortgage than settled areas, and notably lower proportions of outright ownership, as might be expected. Shared ownership is higher in new and older developments, as is private renting. Social renting is also higher in new developments, which is likely to be driven by the policy requirements to have a certain proportion of affordable homes in areas of new development.

Figure 15: Tenure by development type, 2021



Source: Healthy Places JSNA dashboard, based on Census 2021

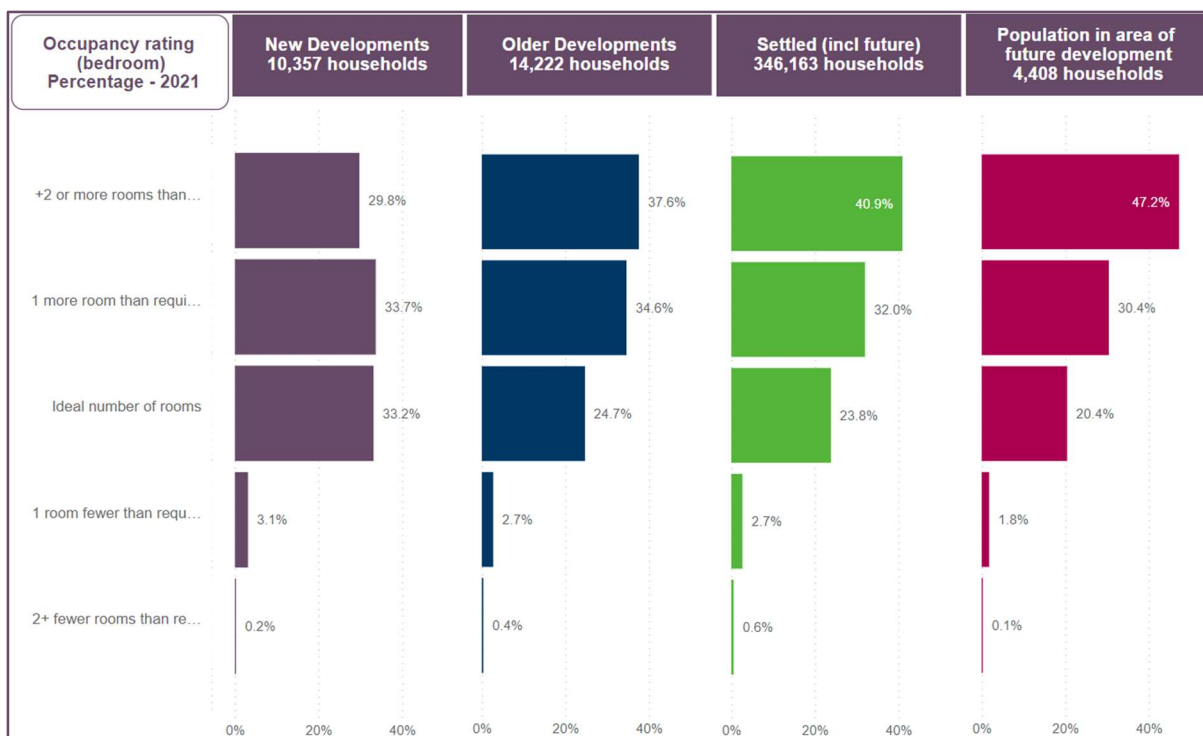
Ownership (including with/without mortgage and shared) of new properties is low in Cambridge (34.6% compared to 55.6% for all new developments), with a higher proportion of private rental (37.2% compared to 23.1% of all Cambridgeshire and Peterborough new developments). This is a similar pattern to the underlying settled areas in the city, where ownership is lower in Cambridge than other districts (46.6% compared to 63.9%) and private rented higher (31.2% compared to 20.3%).

5.5. Occupancy

The Office for National Statistics calculates whether a household's accommodation is considered overcrowded, ideally occupied or under-occupied by comparing the number of bedrooms the household requires (based on the resident population) to the number of bedrooms available.

New developments have the highest proportion of 'ideal number of bedrooms' in comparison to the other types of development, which suggests that homeowners move into a dwelling that suits their immediate or future needs. Older developments and settled areas have more bedrooms than required compared to those in new developments.

Figure 16: Occupancy rating, bedrooms, 2021



Source: Healthy Places JSNA dashboard, based on Census 2021

However, this high level look at Cambridgeshire and Peterborough hides differences between the districts. Cambridge has a high proportion of 'ideal number of bedrooms' and '1 bedroom fewer than required' and lower proportions of 'more bedrooms than required'. All other districts appear to have more bedrooms than required in their new dwellings. Though these proportions will differ by types of tenure. Across Cambridgeshire and Peterborough, for all development types, 7.7% of social rented accommodation has one bedroom too few, as has 5.7% of private rented accommodation. This compares to 1.4% in owned (with/without mortgage or shared) accommodation. For comparison, the rates of overcrowding in owned and rented accommodation in London are 4.5% and 16.9%, respectively.⁴

Figure 17: Occupancy rating, bedrooms, new developments, 2021

Indicator	Cambridge	East Cambridgeshire	Fenland	Huntingdonshire	Peterborough	South Cambridgeshire	Total
+2 or more rooms than required	16.5%	41.8%	41.6%	40.1%	34.6%	39.9%	29.8%
1 more room than required	33.2%	35.1%	33.7%	31.0%	36.4%	33.5%	33.7%
Ideal number of rooms	45.5%	21.5%	22.5%	26.3%	25.7%	25.3%	33.2%
1 room fewer than required	4.4%	1.4%	2.1%	2.5%	3.0%	1.3%	3.1%
2+ fewer rooms than required	0.3%	0.2%	0.0%	0.1%	0.3%	0.1%	0.2%

Source: Healthy Places JSNA dashboard, based on Census 2021

6. New developments

Cambridgeshire County Council's Policy and Insight Team undertake surveys in new housing developments. The New Development Survey includes questions relating to migration, reasons for moving, attraction to the development and views on local services and amenities. This section provides an overview of the combined responses received from these surveys to help inform learning and planning for

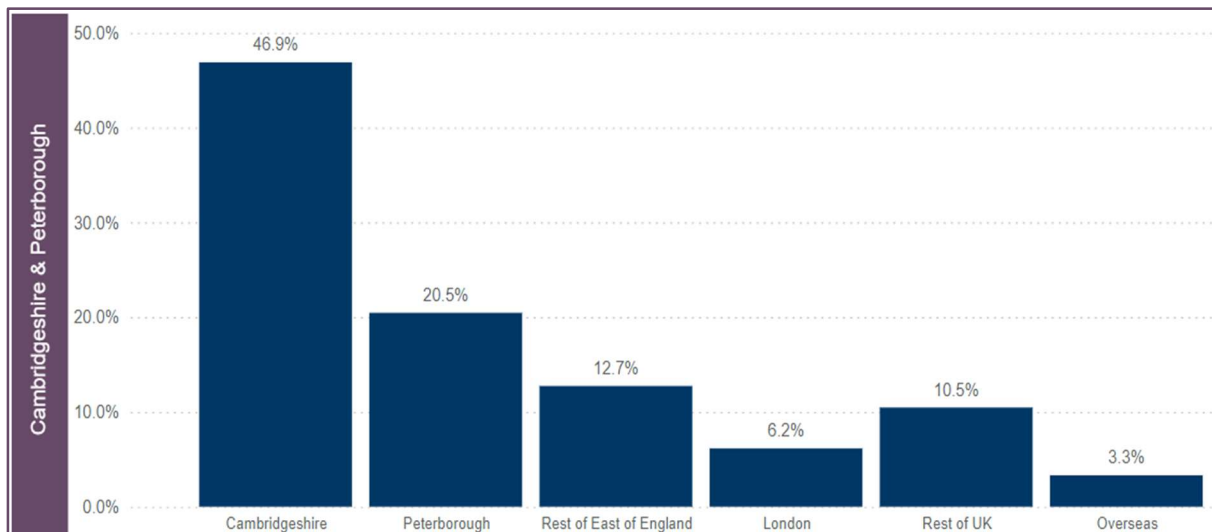
future developments. Whilst some of the questions were only available for individual sites, where relevant, they have been included to give a ‘flavour’ of thoughts and feelings of living in a new development.

Survey responses were available for Cardea, The Hamptons and Paston in Peterborough, Loves Farm in Huntingdon, Northstowe in South Cambridgeshire and the Southern Fringe in Cambridge/South Cambridgeshire. Individual site reports are available on Cambridgeshire and Peterborough Insight and within the Healthy Places JSNA dashboard (<https://cambridgeshireinsight.org.uk/healthy-places-jsna/>).⁵

6.1. Who moves to new developments?

Internal migration accounts for the vast majority of the population who move to new developments, with two-thirds of people surveyed moving from within Cambridgeshire and Peterborough.

Figure 18: Areas migrated from to new developments



Source: Healthy Places JSNA dashboard, based on New Development Survey, Cambridgeshire County Council

There are differences between new development sites. Three quarters of residents in Northstowe, two-thirds of residents in Southern Fringe and half of residents in Loves Farm moved from within Cambridgeshire. This lower proportion at Loves Farm might be expected as it sits on the Huntingdonshire/Bedfordshire border, as well as having close proximity to the train station for London commuters.

Around 57% of people who moved into Peterborough’s new developments moved from within Peterborough, with a further 17% moving from Cambridgeshire. Just over 3% of new development residents across Cambridgeshire and Peterborough were from overseas, with a slightly higher proportion in Southern Fringe (5%).

Reasons for moving away

The main reasons people reported for moving away from their previous residence were (respondents could give more than one answer):

- Wanting to set up own home (39%)

- To find a larger or smaller home (32%)
- To be nearer job/new job (19%)

There were differences by development site, with a higher proportion of Southern Fringe residents moving to be nearer their job/new job (28%) and a lower proportion wanting to set up their own home (31%). A higher proportion of Northstowe residents wanted to set up home (48%), as did Peterborough residents (44%), especially in Paston (52%). In Loves Farm the proportion wanting to set up own home was lower (30%) but wanting to find a larger or small home higher (39%).

Previous tenure

Buying a property was the main reason cited for moving to the new development, with owner occupation increasing from 40% in previous residence to 71% in new developments. At the same time private renting decreased from 38% to 8%. Around one in ten respondents had previously been living with their parents/family.

Reasons for moving to new development

The main reasons people reported for moving to their current property were (respondents could give more than one answer):

- Design/appearance of property/appearance (42%)
- Like idea of living in a new development (34%)
- Price/affordability (27%)

Again, there were differences between developments, with a higher proportion of Southern Fringe residents reporting that they moved to be nearer their job, a higher proportion of residents in Loves Farm moving for better public transport and a lower proportion of Northstowe residents moving for the appearance of the property. A higher proportion of Northstowe residents reported finding it easier to buy new property from developers and price/affordability.

Satisfaction (respondents could give more than one answer)

Around half of respondents across all sites reported that they were 'Very' or 'Fairly' satisfied with the local services and amenities in their local area, but this ranged widely from 80% in The Hamptons to only 10% in Northstowe. Over three-quarters of Northstowe residents reported being 'Very' or 'Fairly' dissatisfied with their local services and amenities, with retail shops and supermarkets (58%), amenities, facilities and services (35%) and healthcare facilities (24%) being the main reasons for dissatisfaction and the areas that the residents would most like to see change. This question was also asked in the Southern Fringe where dissatisfaction was highest with lack of shops/restaurants/pubs/cafes (41%) and lack of nearby bus stops/poor service in the evening and at weekends and cost (18%).

Quality of Life and Health

Loves Farm residents were asked whether moving into the new development had changed their quality of life; 57% reported that their quality of life had improved, 39% saw no difference and 4% reported a worsening quality of life. The residents were

also asked if their health and physical activity had improved. Almost a quarter (23%) of residents reported that their health had improved, 65% saw no difference and 12% had experienced worsening health. Whilst 45% reported that their physical activity had increased, 43% experienced no difference and 12% reported that their physical activity had decreased. Data are unavailable for other new sites.

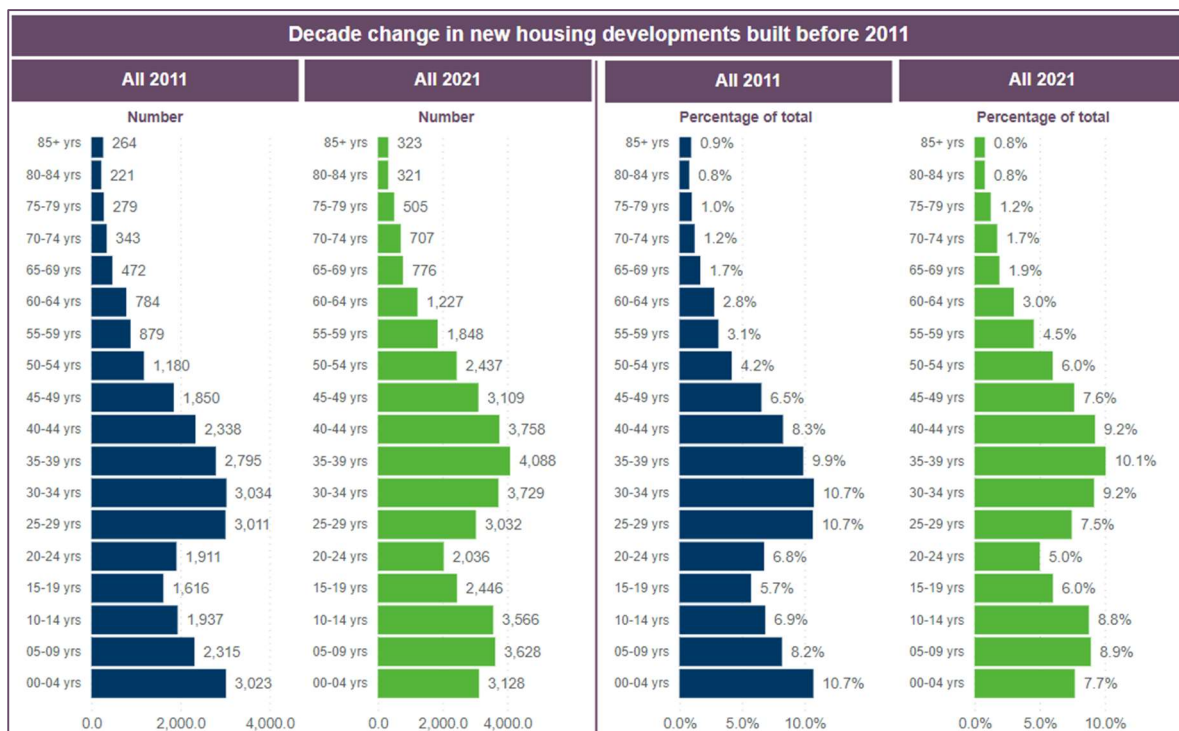
6.2. How do new developments evolve over time?

Two time points a decade apart, the Census 2011 and Census 2021, were used to explore how populations in new housing developments change over time. This includes Bar Hill, Cambourne and Orchard Park in South Cambridgeshire, The Hamptons in Peterborough and Loves Farm in Huntingdonshire. It is important to note that each site was at a different stage of development between 2011 and 2021 and therefore it is not possible to provide an accurate, direct comparison.

Figure 19 presents the change over time for the combined population of these developments but are available individually in the Healthy Places dashboard.

In total the population of these areas increased by 44% (12,412 people) over the 10 years with increases seen across all age bands, most notably in people in their fifties and in early secondary school aged children (10 to 14 year olds). However, there were decreases seen in the proportion of preschool children and adults in their twenties and early thirties. This may suggest that a good proportion have started families or moved in with very young families.

Figure 19: Population changes in new housing developments, 2011 and 2021

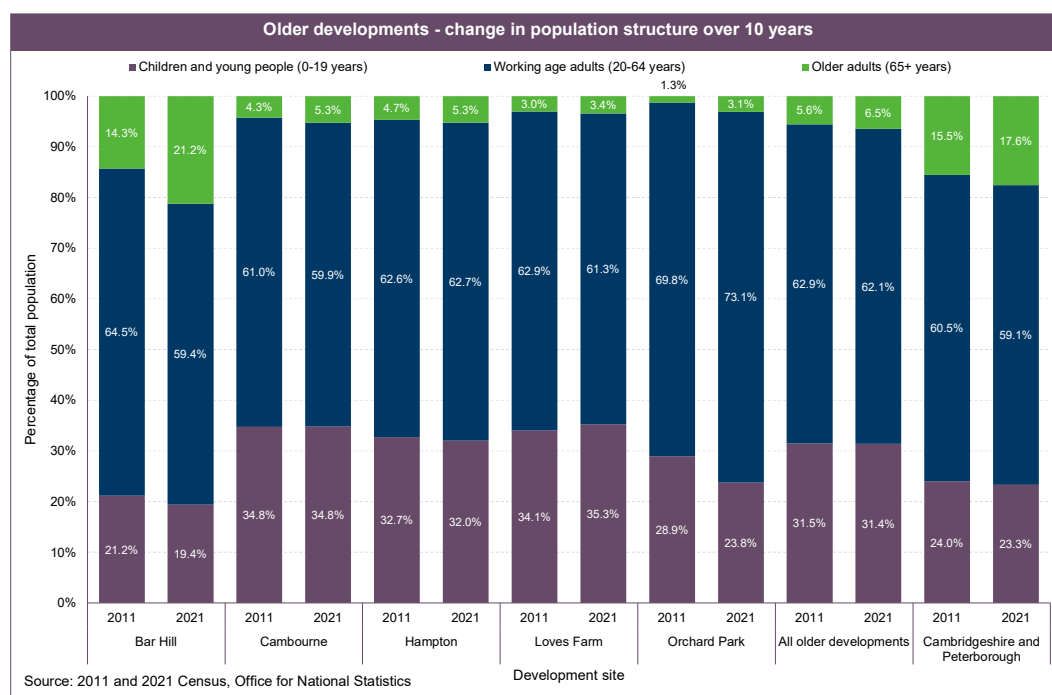


Source: Healthy Places JSNA dashboard, based on Census 2021

The older sites were at various stages of development between 2011 and 2021, but almost all experienced increases in population between 2011 and 2021. However, Bar Hill, by far the oldest and most settled development (the development began in the mid-1960s), experienced an overall decrease in population (3.2%, 131 people), with decreases seen across most age bands and most notably in young people aged 15 to 24 years (181 people, 37.3%) and 45 to 49 years (100 people, 27.8%). This could suggest the ageing of children to young adulthood and moving out of area for education or to start their own homes. As would be expected, due to a naturally ageing population, some of the decrease in population in Bar Hill was offset by an increase in the older population aged 65 year and over (251 people, 43.5%). Understanding these changes in population may help plan for the long term of new developments.

Generally new developments have a younger population than that of more settled areas, and this has continued to be the case in the older development sites as shown in Figure 20, with very low proportions of older adults. However, Bar Hill, now 60 years old, has a similar proportion of older adults to Cambridgeshire and Peterborough, suggesting that new developments move toward the norm over time.

Figure 20: Proportion of population by older development site, 2021



Source: Healthy Places JSNA dashboard, based on Census 2021

6.3. Housing Needs of Specific Groups

In 2021, GL Hearn together with Justin Gardner Consulting and Icen Projects were commissioned by the Cambridgeshire and West Suffolk Local Planning Authorities to undertake a study *Housing Needs of Specific Groups Cambridgeshire and West Suffolk*.^{6,7} It is important to note this this excludes Peterborough.

The study aimed to provide robust and sound evidence to support the preparation of Local Plans, and potentially Neighbourhood Plans, as well as planning policies relating to the needs of groups with specific housing requirements. The outcomes were presented for each Local Authority together with aggregated findings for the Cambridge Sub-Regional Housing Market Area (HMA) which includes Cambridge, East Cambridgeshire, Fenland, Huntingdonshire, South Cambridgeshire and West Suffolk. The report also provides outputs for the Greater Cambridge area (Cambridge and South Cambridgeshire). The study was prepared in compliance with the National Planning Policy Framework (NPPF 2021) and the current Planning Practice Guidance (PPG).

Based on need (household projections and affordability) the authors of the study concluded that a minimum of 3,854 new dwellings per year were needed in Cambridgeshire, leading to an extra 149,000 population between 2020 and 2040.

Affordable housing need

The affordable housing calculations suggested that 43% of housing need would need to be affordable housing to rent, with this being higher in Fenland (54%) and lower in East Cambridgeshire (36%)

Table 7: Affordable housing per year, 2020 to 2040

Local authority	Affordable net need	Housing need	% of housing need
Cambridge	314	658	48%
East Cambridgeshire	215	597	36%
Fenland	289	538	54%
Huntingdonshire	404	976	41%
South Cambridgeshire	435	1,085	40%
West Suffolk	409	800	51%
HMA	2,066	4,654	44%

Source: Housing Needs of Specific Groups, GL Hearn^{6,7}

However, whilst the report stated that councils should seek to deliver as much affordable housing as possible, the NPPF states that affordable home ownership should be a minimum of 10% of all housing.

Older and disabled people

Table 8 below is based on population growth (75 years and over) and prevalence rates and shows the need for different types of accommodation across the HMA. This includes self-contained units and bedspaces in institutional accommodation. All areas have a significant need for leasehold housing with support, and at a lesser extent leasehold housing with care. An extra 5,940 care-bed spaces are needed across Cambridgeshire.

Table 8: Type of older person accommodation up to 2040

Type	Tenure	Cambridge	E. Cambs	Fenland	Hunts.	S. Cambs	HMA
Housing with support	Rented	-289	-88	-440	194	-502	238
Housing with support	Leasehold	643	969	1,115	1,533	1,447	7,404
Housing with care	Rented	121	122	304	371	192	1,544
Housing with care	Leasehold	271	271	337	635	473	2,589
Care bed-spaces	-	179	1,145	1,200	1,803	1,613	5,940

Source: Housing Needs of Specific Groups, GL Hearn^{6,7}

HMA: Housing Market Area

Between 2020 and 2040 the number of older people with dementia is expected to increase by 76.2% and those with mobility problems by 65.6%. The Housing Needs report suggest that there is a need for an extra 6,374 additional wheelchair user dwellings to 2040, equating to 8.3% of the total Local Housing Need in Cambridgeshire. There is also a need to increase the supply of accessible and adaptable dwellings as well as wheelchair user dwellings. 'Homes for Life' should be considered where suitability is for any occupant regardless of whether or not they have a health problem or disability at the time of initial occupation. Around 7% of market tenures and 18% of affordable dwellings should be wheelchair user dwellings.

Student accommodation

The Anglia Ruskin University is planning to remain at the same number of students in Cambridge over the next five to ten years. The University of Cambridge (pre covid) planning framework suggests an expansion of undergraduate numbers of 0.5% per year for the next ten years and 2% expansion in postgraduate numbers. The research concluded that a total of 8,959 student bedspaces would need to be built in purpose-built student accommodation by 2026 to meet the current (6,085 students) and future (2,874 students) demand. Extrapolating this to the 2040/41 academic year increases the future need to 3,571 student bedspaces.

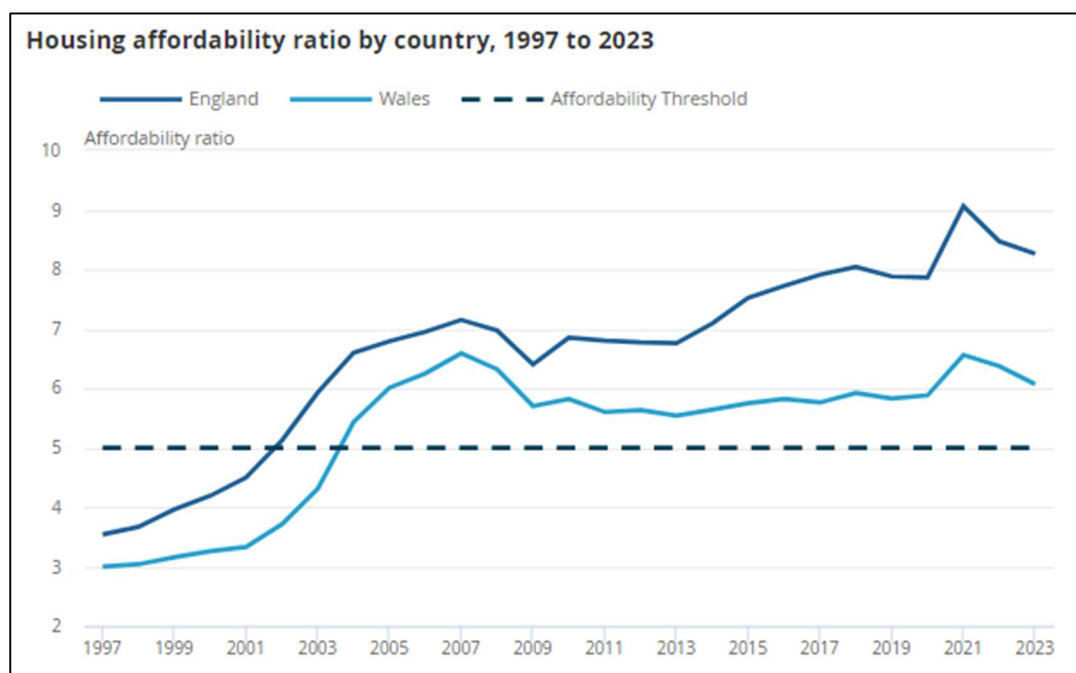
7.Housing affordability

Affordability ratios are calculated as the median house price to median income in an area, based on full-time annual salaries; the higher the ratio, the less affordable an area is thought to be. In 2023 full time employees in England could expect to spend

around 8.3 times their annual earnings buying a home. This ratio shows a return to the pre-coronavirus pandemic level, as shown in Figure 21 below.

The affordability threshold is set at five times earnings as a general indicator of an affordable property price. This reflects that mortgages have traditionally been offered at four to five times annual incomes.

Figure 21: Trend in national affordability ratios



Source: Housing affordability in England and Wales, 2023, Office for National Statistics⁸

Locally, Cambridge has the highest affordability ratios for both newly built and existing dwellings. Fenland and Peterborough have the lowest affordability ratios.

Across all districts, new dwellings are more expensive than existing dwellings, but there are differences across Cambridgeshire and Peterborough. For example, a median house price for new dwellings in South Cambridgeshire is 8% more expensive than existing dwellings, compared to 36% in the Cambridge and 33% in Huntingdonshire.

Table 9: Median house price to median income ratios, year to end September 2024

Area	Newly built dwellings			Existing dwellings			% difference between median house prices - new dwellings compared to existing dwellings
	Median House Price (£)	Median gross annual workplace-based earnings (£)	Ratio	Median House Price (£)	Median gross annual workplace-based earnings (£)	Ratio	
Cambridge	£673,148	£39,930	16.9	£494,000	£39,930	12.4	36%
East Cambridgeshire	£370,473	£31,875	11.6	£335,000	£31,875	10.5	11%
Fenland	£257,000	£31,346	8.2	£230,000	£31,346	7.3	12%
Huntingdonshire	£406,998	£35,431	11.5	£305,000	£35,431	8.6	33%
South Cambridgeshire	£450,000	£40,352	11.2	£417,500	£40,352	10.4	8%
Cambridgeshire *	£407,000	£37,395	10.9	£340,000	£37,395	9.1	20%
Peterborough	£287,950	£33,425	8.6	£233,000	£33,425	7.0	24%
England	£365,000	£35,106	10.4	£287,000	£35,106	8.2	27%

Source: Housing affordability, Office for National Statistics * includes Peterborough⁸

It is apparent in the figure below that the ratios are higher in new dwellings and highest in Cambridge. The ratios are relatively low in Fenland and Peterborough.

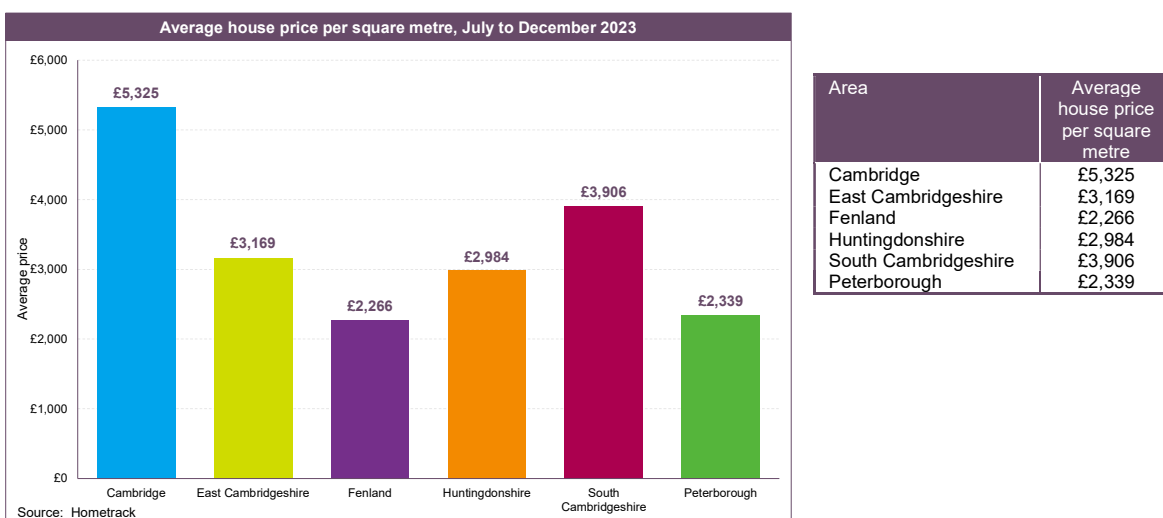
Figure 22: Median house prices to median income, ratios, year to September 2023



The Healthy Places JSNA dashboard contains a map of the affordability ratios at ward level. Available at <https://cambridgeshireinsight.org.uk/healthy-places-jsna/>

other indicator for affordability is the average house price per square metre. This varies widely across Cambridgeshire and Peterborough, with the average house price per square metre in Cambridge (£5,325) being over double that of Peterborough (£2,339) and Fenland (£2,266).

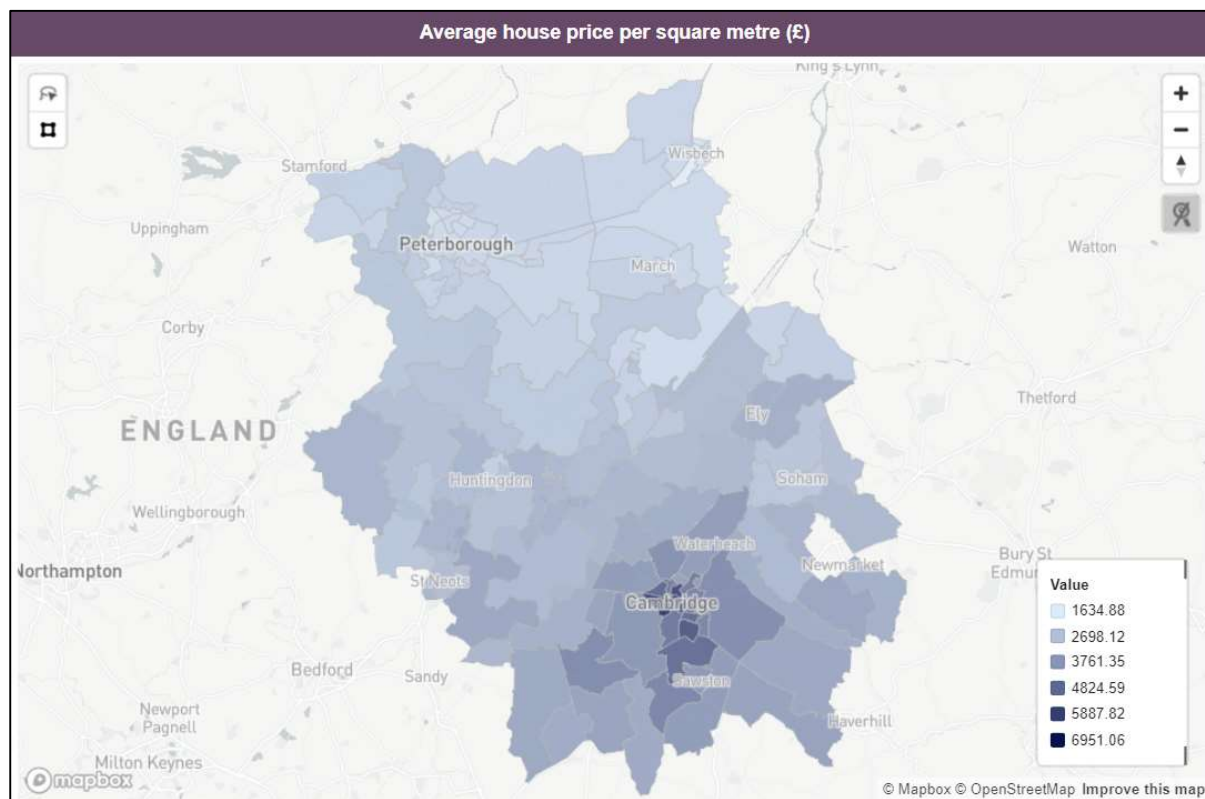
Figure 23: Average house price per square metre, July to December 2023



Source: Hometrack's Automated Valuation Model

There is an apparent north/south divide regarding house pricing in Cambridgeshire and Peterborough, with highest price per square metre to the south of the region and the lowest prices to the north, especially in the more rural fenland areas.

Figure 24: Average house price per square metre, July to December 2023



Source: Hometrack's Automated Valuation Model

8. Forecasts

8.1. Population forecasts

Population forecasts are essential for service planning, both in terms of being able to plan for increases or decreases in population size but also to be aware of, and mitigate for, the nuances and needs of a changing age structure.

The Cambridgeshire County Council Policy and Insight Team publish population forecasts based on births, deaths, migration and known housing developments in Cambridgeshire and Peterborough. This section presents the data from the 2022-based population forecasts available on Cambridgeshire & Peterborough Insight.⁹

Cambridgeshire

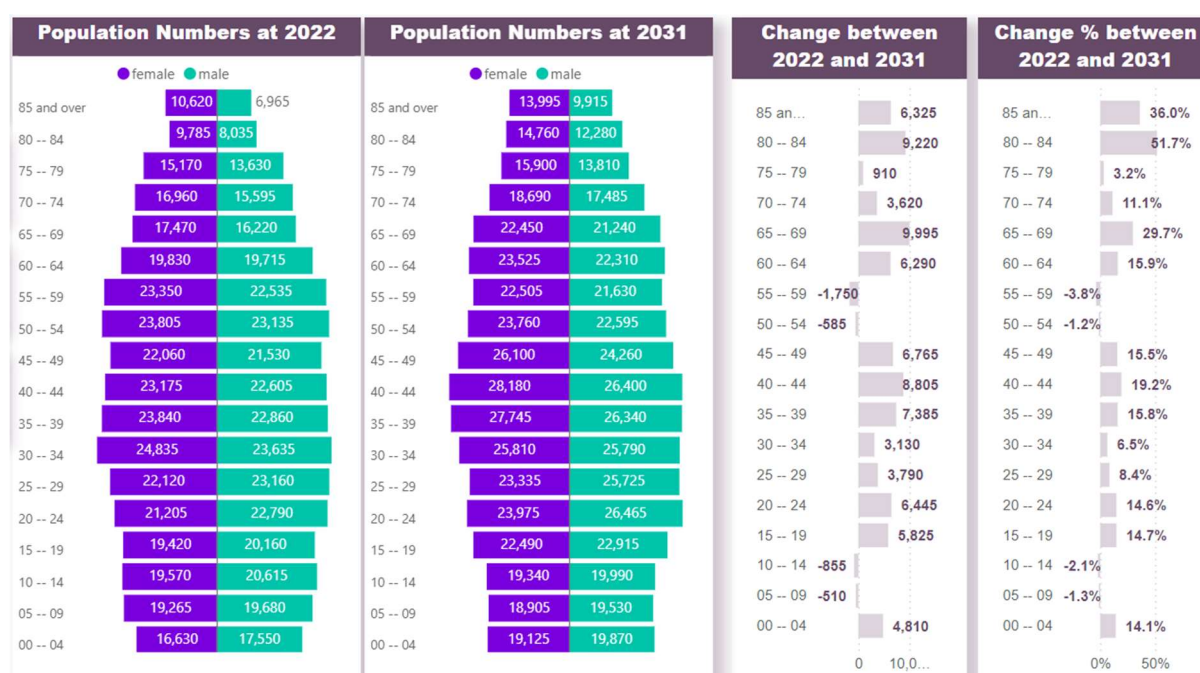
Between 2022 and 2031 the population of Cambridgeshire is forecast to increase from 689,530 people to 769,135 people, an increase of just over 79,600 (11.5%). The rate of increase in the subsequent 10 years to 2041 is slower with an extra

46,800 people (6.1%). However, housing development plans are likely to be unknown/incomplete for the longer term, which will have an impact on the lower population forecasts between 2031 and 2041.

Age band

Over the 9 years to 2031 it is forecast that there will be decreases in the number of children and young people aged 5 to 14 years (1,365 children, 1.7%) and people aged in their fifties (2,330 people, 2.5%) in Cambridgeshire, with notable increases expected in all other age bands, especially in the older age groups. An increase is also forecast in children aged under 5 years old (14.1%, 4,815), which is mainly associated with growth in new housing developments.

Figure 25: Population forecasts, Cambridgeshire, mid 2022-based



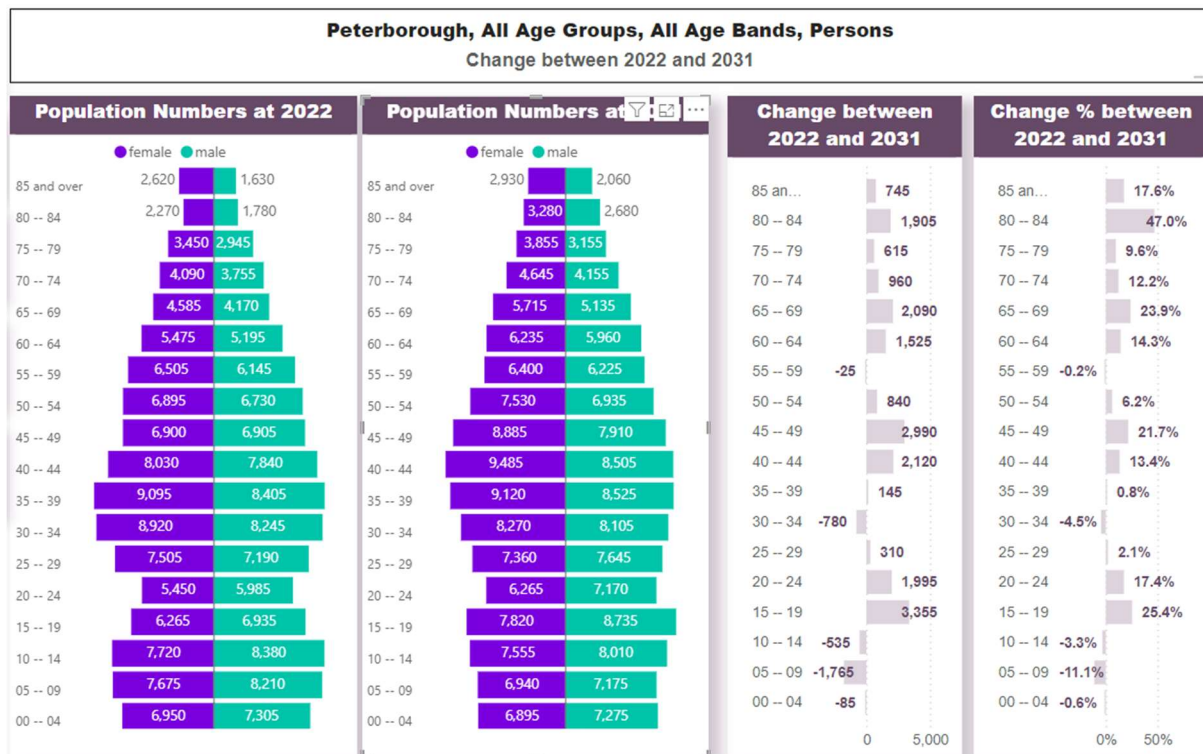
Source: Overarching JSNA, Cambridgeshire and Peterborough Insight based on Cambridgeshire County Council Policy and Insight Team's 2022-based population forecasts¹

Peterborough

Between 2022 and 2031 the population of Peterborough is forecast to increase from 218,130 people to 234,540 people, an increase of over 16,400 (7.5%). The rate of increase in the subsequent 10 years to 2041 is forecast to be slower with an additional 9,085 people (3.9%).

The age structure of Peterborough is predicted to change considerably over the next 9 years. It is forecast that there will be decreases in under 15 year olds (5.2%, 2,385 people) - most notably in children aged 5 to 9 years old (11.1%, 1,765 children) and in 30 to 34 year olds (780 adults, 4.5%). Increases are forecast in all other age bands, most notably in 15 to 24 year olds (5,355 people, 21.7%), adults in their forties (5,110 adults, 17.2%), adults in their sixties (3,620 adults, 18.7%) and in people aged 75 years and over (3,270 people, 22.3%).

Figure 26: Population forecasts, Peterborough, 2022 to 2031

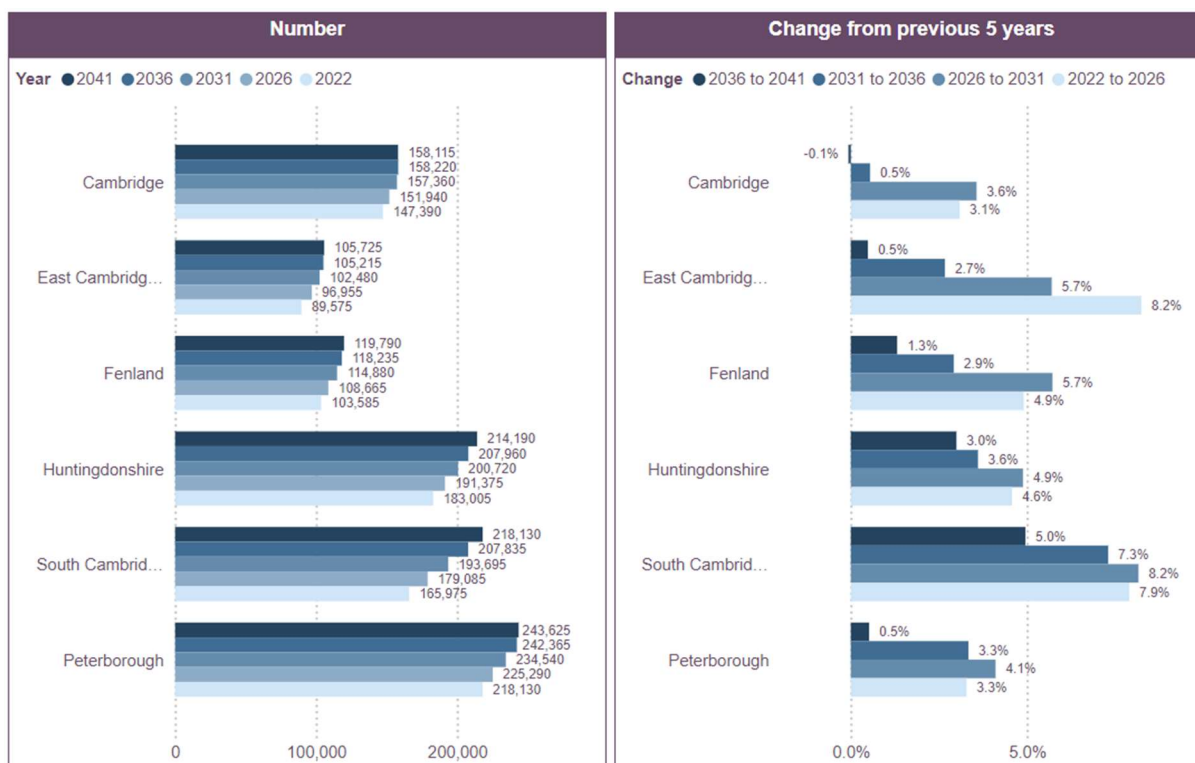


Source: Overarching JSNA, Cambridgeshire and Peterborough Insight based on Cambridgeshire County Council Policy and Insight Team's 2022-based population forecasts. ¹

Districts

The rate of increase varies by time period and district, with the greatest rates of increase forecast in East Cambridgeshire (8.2%) and South Cambridgeshire (7.9%) between 2022 and 2026 and in Fenland (5.7%), East Cambridgeshire (2.7%) and South Cambridgeshire (8.2%) between 2026 and 2031. This is reflective of predicted changes in births, deaths, migration, and growth in new developments.

Figure 27: Population forecasts by district, mid 2022-based



Source: Healthy Places JSNA dashboard, based on Cambridgeshire County Council Policy and Insight Team's 2022-based population forecasts

Ward

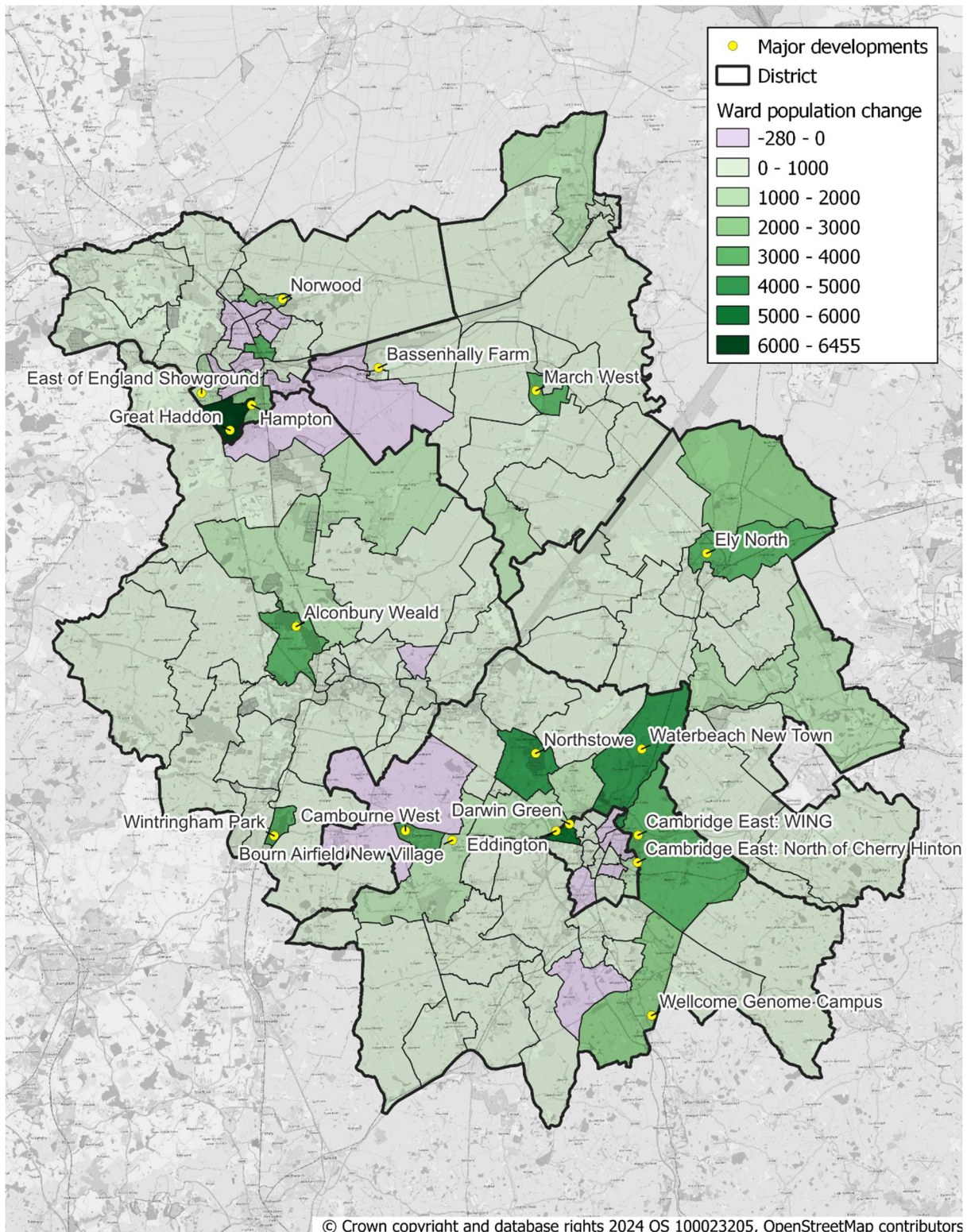
The following two maps present the population forecasts at ward level, both in terms of actual numbers for service planning and the proportional changes to understand the impact on local populations.

The largest changes, in terms of actual numbers, between 2022 and 2031 are forecast in:

- Hampton Vale/Great Haddon in Peterborough (6,455 people, 75.3%)
- Castle in Cambridge (5,070 people, 61.7%)
- Longstanton/Northstowe in South Cambridgeshire (4,990 people, 62.3%)
- Milton & Waterbeach in South Cambridgeshire (4,145 people, 37.8%)
- The Stukeleys in Huntingdonshire (3,975 people, 61.2%)

All these wards are in areas of housing development.

Figure 28: Cambridgeshire and Peterborough population forecasts, change between 2022 and 2031, numbers



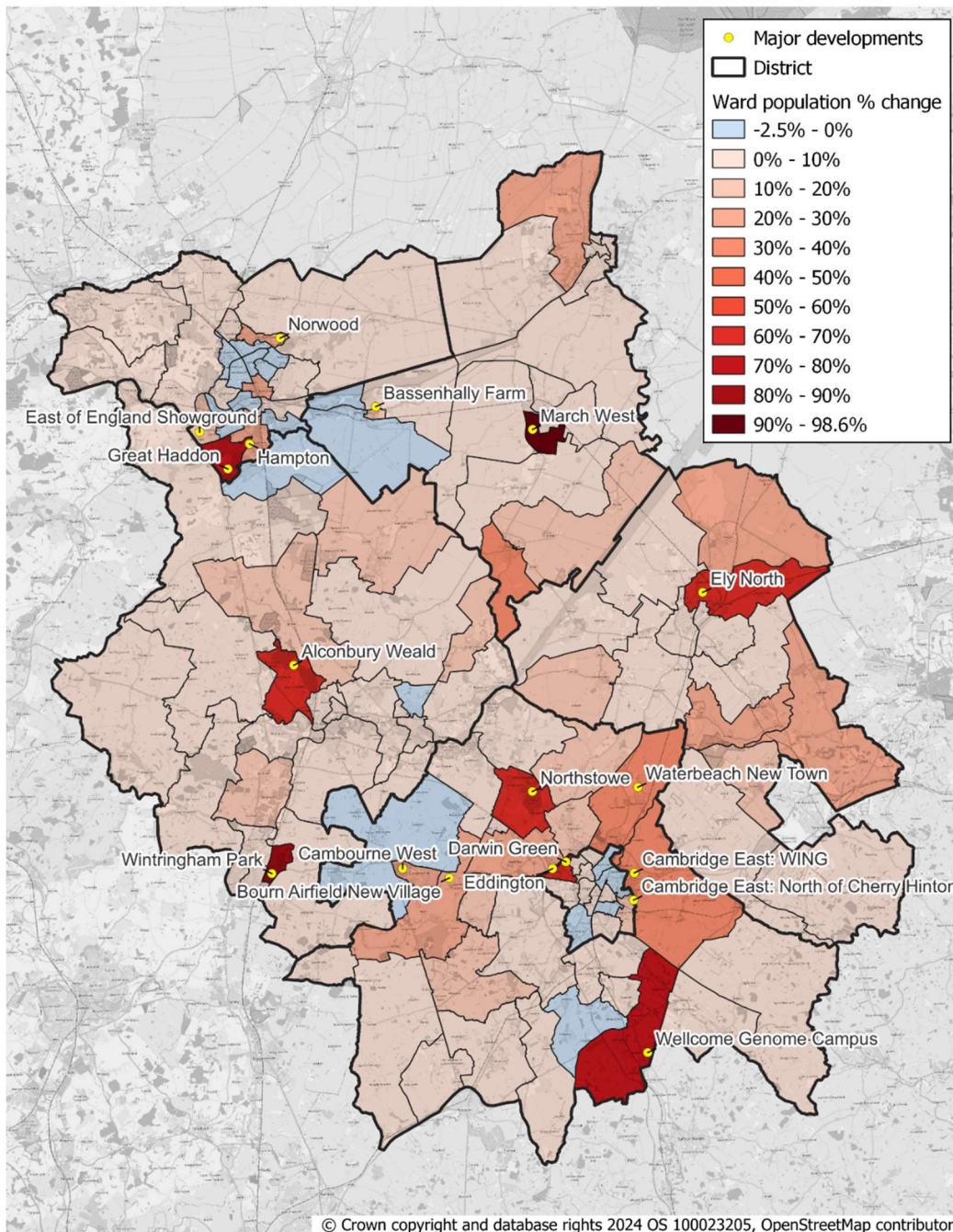
Source: Cambridgeshire County Council's 2022-based population forecasts

The largest proportional increases between 2022 and 2031, as seen in Figure 29, are expected in:

- March South in Fenland (3740 people, 98.6%),
- St Neots East in Huntingdonshire (3,395 people, 81.7%),
- Hampton Vale/Great Haddon in Peterborough (6,455 people, 75.3%)
- Duxford in South Cambridgeshire (2,690 people, 72.6%)
- Ely North in East Cambridgeshire (3,345 people, 63.8%).

Again, these wards are associated with housing development areas, and, although some of them are at a smaller scale than other developments, they will have an impact on the current population and demands for local services and amenities.

Figure 29: Cambridgeshire and Peterborough population forecasts, change between 2022 and 2031, proportions



8.2.Dwellings

As well as population forecasts, the Cambridgeshire County Council Policy & Insight Team produce dwelling forecasts, based on district Local Plans. As would be expected, the wards with the largest forecast change are in areas of new housing development, as shown in Figure 30.

Figure 30: Dwelling forecasts, change between 2022 and 2031, mid 2022 based

Wards with greatest change in number of dwellings				Wards with great change in proportion of dwellings			
Ward	Local Authority	Change 2022 to 2031		Ward	Local Authority	Change 2022 to 2031	
		Number	%			Number	%
Hampton Vale (Great Haddon)	Peterborough	3,020	94.5%	St Neots East	Huntingdonshire	1,620	101.9%
Longstanton (Northstowe)	South Cambridgeshire	2,325	72.2%	March South	Fenland	1,685	100.3%
Castle	Cambridge	2,295	82.9%	Hampton Vale (Great Haddon)	Peterborough	3,020	94.5%
Milton & Waterbeach	South Cambridgeshire	1,925	38.7%	Castle	Cambridge	2,295	82.9%
The Stukeleys	Huntingdonshire	1,895	70.3%	Ely North	East Cambridgeshire	1,645	77.8%
March South	Fenland	1,685	100.3%	Duxford	South Cambridgeshire	1,210	76.6%
Fen Ditton & Fulbourn	South Cambridgeshire	1,670	34.0%	Longstanton (Northstowe)	South Cambridgeshire	2,325	72.2%
Ely North	East Cambridgeshire	1,645	77.8%	The Stukeleys	Huntingdonshire	1,895	70.3%
St Neots East	Huntingdonshire	1,620	101.9%	Milton & Waterbeach	South Cambridgeshire	1,925	38.7%
Cambourne	South Cambridgeshire	1,610	36.0%	Hargate & Hempsted	Peterborough	1,575	38.0%
Hargate & Hempsted	Peterborough	1,575	38.0%	Cambourne	South Cambridgeshire	1,610	36.0%
Central	Peterborough	1,570	26.5%	Fen Ditton	South Cambridgeshire	1,670	34.0%

Source: 2022-based dwelling forecasts, Cambridgeshire Policy & Insight Team, Cambridgeshire County Council

9. Considerations in meeting the health and wellbeing of people new communities

This chapter has established that the populations living in new developments differ from those in established communities, for example they are generally younger, more ethnically diverse and generally healthier. These differences have implications for the health and wellbeing needs in new developments and the services required to meet those needs. However, service provision must be adaptable to meet the changing needs and demands of the population as it ages and becomes a more settled population.

The table below outlines some of the health and wellbeing implications for service provision in new developments.

Table 10: New developments compared to settled areas, service implications

Observation	Health implications and service needs
Younger population age structure	<ul style="list-style-type: none"> Local opportunities for employment, further education and training for school leavers Higher need for sexual reproductive health service Higher need for mental health services (especially community support for mild-moderate illness)

	<ul style="list-style-type: none"> • Initial lower demand for older age care, such as care home placements and dementia care. Awareness that needs will increase and plans for timely provision must be in place • Services and community assets need to be adaptable to manage increased demand as population ages • Housing needs to be adaptable to manage changes in health over time e.g. wheelchair access • Ensure connected active transport routes between new development and established centres for employment
Higher proportion of children and young people	<ul style="list-style-type: none"> • Higher need for childcare availability • Higher need for nursery places • Higher need for primary and secondary school places • Higher need for child/parent friendly community services and amenities • Higher demand on primary care for babies and infants • Higher demand on urgent care for babies and infants • Higher demand on social care for children • Higher need for age-appropriate play and leisure spaces for children and young people
Higher birth rates	<ul style="list-style-type: none"> • Higher need for maternity services • Higher need for health visiting services • Higher need for primary care services • Higher need for community and support networks available for the higher proportion of lone parents • Ensure housing plans enable space for children to learn and play at home
Higher ethnic diversity	<ul style="list-style-type: none"> • Ensure fair and equitable access to services and provision of amenities for all (e.g., health-related translation provision, languages of health campaigns) • Consideration of cultural and religious diversity
Higher levels of education and employment	<ul style="list-style-type: none"> • Health literacy is likely to be higher • Lower risk of income deprivation • Ensure new homes have suitable spaces for home working
Higher average number of people per household	<ul style="list-style-type: none"> • Ensure that all services and amenities plan for the extra population that results from a new development, based on the elevated household multipliers for new developments
High proportion of shared ownership and social renting	<ul style="list-style-type: none"> • Ensure access to affordable housing • Have a variety of purchase options available to allow fair access to new home ownership
Lack of amenities in new developments at initial stages	<ul style="list-style-type: none"> • Plan for flexible and adaptable service provision until permanent facilities in new development are commercially viable

References

1. Cambridgeshire Insight. *Overarching 2023 Joint Strategic Needs Assessment (JSNA) for Cambridgeshire and Peterborough.*; 2023. Accessed July 1, 2024. <https://cambridgeshireinsight.org.uk/jsna-2023/>
2. Health Action Research Group. The role of education in reducing health inequalities.
3. The Health Foundation. *Relationship between Employment and Health.*; 2022. Accessed July 1, 2024. <https://www.health.org.uk/evidence-hub/work/employment-and-underemployment/relationship-between-employment-and-health#:~:text=Key%20points,a%20lower%20healthy%20life%20expectancy>
4. Office for National Statistics. *Overcrowding and Under-Occupancy by Household Characteristics, England and Wales: Census 2021.*; 2023. Accessed July 1, 2024. <https://www.ons.gov.uk/peoplepopulationandcommunity/housing/articles/overcrowdingandunderoccupancybyhouseholdcharacteristicsenglandandwales/census2021#:~:text=Source%3A%20Census%202021%20from%20the%20Office%20for%20National%20Statistics,-Embed%20code&text=Out%20of%20all%20English%20regions,other%20mobile%20or%20temporary%20structures>.
5. Cambridgeshire Insight. *New Homes & Communities.*; 2024. Accessed July 1, 2024. <https://cambridgeshireinsight.org.uk/housing/priority-themes/new-homes-communities/>
6. GL Hearn. *Housing Needs of Specific Groups: Cambridgeshire and West Suffolk.*; 2021. Accessed July 1, 2024. https://cambridgeshireinsight.org.uk/wp-content/uploads/2023/02/CWS-HNSG-Oct-21_FINAL_Accessible.pdf
7. GL Hearn. *Appendix F - Housing Needs of Specific Groups.*; 2021. Accessed July 1, 2024. <https://cambridgeshireinsight.org.uk/wp-content/uploads/2023/01/Appendix-F-CWS-Housing-Needs-of-Specific-Groups-Oct-2021-accessible.pdf>

8. Office for National Statistics. Housing affordability in England and Wales: 2023. 2023. Accessed July 1, 2024.
<https://www.ons.gov.uk/peoplepopulationandcommunity/housing/bulletins/housingaffordabilityinenglandandwales/2023#:~:text=Out%20of%20318%20local%20authority,those%20between%202021%20and%202022>)

9. Cambridgeshire Insight. *Local Population and Dwelling Stock Estimates and Forecasts.*; 2024. Accessed July 1, 2024.
<https://cambridgeshireinsight.org.uk/population/population-forecasts/>

Appendices

Appendix 1: Methodology for determining types of development

There is no perfect fit between Census geographies and the planning boundaries of new developments. This analysis uses a best fit look up methodology applying Census 2011 and Census 2021 Output Area (OA) geographies to the planning boundaries of the new developments.

The methodology differs slightly between those new developments classified as 'Older new developments' (where notable development began prior to Census 2011), and those classified as 'New developments' (where notable development has begun between Census 2011 and Census 2021).

The best fit look up methodology means that OAs included will cover areas that lie outside the planning boundary.

Older New Developments

- New developments where notable dwelling build began prior to Census 2011.
- Inclusion of all Census 2021 Output Areas that lie within or intersect the planning boundary of the new development.
- Inclusion of all Census 2011 Output Areas that lie within or intersect the planning boundary of the new development.
- Inclusion of additional Census 2021 OAs or Census 2011 OAs to ensure that the geographical area covered is consistent across the two sets of geographies, allowing for Census 2011 to Census 2021 change over time comparison.

New developments

- New developments where notable dwelling build began between Census 2011 and Census 2021.
- Analysis of Census 2021 Output Areas that lie within or intersect the planning boundary of the new development.
- Where the Census 2021 OA intersects but does not lie completely within the planning boundary of the new development, an analysis of overlap by count of address points has been undertaken. Of these, only those OAs where more than 50% of the address points lie within the planning boundary have been included.

Future new developments

- Those new developments where dwelling build is limited so far or not yet started.
- Inclusion of all Census 2021 Output Areas that lie within or intersect the planning boundary of the new development.

Additional note:

In some cases, the boundaries of Census 2021 OAs span more than one new development, for example where developments are close or neighbouring such as Loves Farm and Wintringham Park. For 'Older new developments' these OAs have been included, even if a greater number of address points sit outside the new development planning boundary than within. This is to enable comparison over time with Census 2011 data on a like for like basis.

Where OAs of 'Older new developments' or 'New developments' span the planning boundaries of 'Future new developments', the OA has been assigned to the relevant 'Older new development' or 'New development' as building has yet to substantially commence for the 'Future new development' sites.