

LICHFIELDS



Cambridge Biomedical Campus Housing Study

Establishing the housing needs of the CBC workforce

Report

April 2024



Cambridge
Biomedical Campus

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Executive Summary

CBC and Cambridge's Housing Challenges

This report, prepared by Lichfields on behalf of Cambridge Biomedical Campus Ltd, presents the findings of a study establishing the housing needs of the workforce at the Cambridge Biomedical Campus (CBC). CBC is the largest employment site in Cambridge and is workplace to around 22,000 employees in the health, education and research, and commercial life sciences sectors. The Campus is home to globally significant on-site biomedical research, patient care and education.

House prices in Cambridge are high, and housing affordability is a challenge for many. Entry level (lower quartile) house prices in Cambridge are 13.7 times earnings for workers at CBC, increasing to 14.8 times earnings for those on lower incomes in the health sector. Many employees face challenges in accessing housing, whilst limited affordable housing options affects the ability of CBC's employers to recruit and retain staff.

CBC is accessible via a range of active travel and public transport options, with this set to improve in the future, in particular through the completion of Cambridge South railway station at the Campus. CBC has plans to expand, and it is envisioned that a growth in jobs from 22,000 to 40,000 could be seen at the Campus over the next 15-25 years. These developments will drive both the overall future housing needs associated with the Campus as well as the geographical area over which CBC workers will continue to access the housing market (taking into account commuting patterns and preferences).

Bringing these together, this study identifies the overall current and future housing needs associated with the Campus (see right) and sets out an 'ask' (see overleaf) of policy makers, decision takers and developers. This 'ask', based on the evidence of needs, sets out the starting point for how CBC will engage with the planning system and with developers progressing housing sites and schemes near and/or well-connected to the Campus.

CBC's Housing Needs in Summary



38%

of workers at CBC describe their ability to meet current housing costs as 'moderately **stretched**' (27%) or 'very stretched' (11%)



30%

of CBC workers are currently **unable to afford** rents in the open market and are therefore in need of affordable rented housing.



1/5th

fall in a **squeezed middle** group of being able to afford to rent and not eligible for help, but not being able buy a home despite most – 70% – wanting to.



14,000-16,000

affordable homes needed to meet current and future needs of CBC employees. **9,000** affordable rented homes plus **5-7,000** intermediate tenure homes.



1,600-3,600

built to rent homes available to CBC workers with flexible/incremental tenancy lengths.



1,600-3,600

demand for - well designed and well managed - **Co-Living shared accommodation** type units.



3%

of workers are students, trainees or apprentices, typically on lower incomes and needing **affordable student accommodation** (e.g. similar to Co-Living).



3%

of workers across all tenures need a **wheelchair accessible home**.

Executive Summary

CBC's Housing Ask

CBC Ltd wish to see a housing market in Greater Cambridge which works for Campus workers. This means that workers on lower incomes, who are critical to the success of the Campus, and in most need of affordable housing, will be able to access the homes they need. It also means workers of all types and at all income levels have access to attractive and well-located housing options. This will help the Campus to grow and thrive. To achieve this, our 'housing ask' reflects what CBC Ltd wishes to see delivered, including through the planning system.

This housing ask is split by:

1. A generalised 'basic ask' (summarised right) identified to reflect the minimum affordable housing provision that would be required to meet the housing needs of the Campus;
2. A generalised set of housing principles (summarised overleaf) for how CBC wishes new development and growth to respond to the needs and preferences of CBC workers; and
3. A specific 'ask' of strategic sites (summarised overleaf), seeking sites closer to CBC provide specifically for CBC's identified housing needs where that is part of the rationale for a site being promoted or coming forward.

Underlying these asks is CBC's wish to see the housing needs of its workers met, particularly at the lowest incomes, where needs are most acute, and where affordable housing delivery should be protected at the first step of development proposals. As part of this, it is important that housing tied to or prioritised to CBC workers can be delivered in order to meet the Campus' needs. Examples at Eddington (University of Cambridge employee accommodation) or Hinxton (Wellcome Trust accommodation) illustrate ways this can be achieved, but options include direct delivery for Campus employees, agreement of local lettings plans or allocation mechanisms for Campus workers/professions and/or agreements with partners to provide market priority to CBC workers.

Our 'Basic Ask' based on headline housing needs

To reflect Cambridge Biomedical Campus' housing needs, new housing growth (e.g. sites) delivered to help meet our current and future workers needs should provide:

1. At least **30% of new homes as affordable tenures for rent** (Social/Affordable Rent); plus
2. At least **13%** and up to **20% of new homes as intermediate housing tenures** provided as a suitable mix such as First Homes, shared ownership or rent-to-buy tenures;
3. A **mix of affordable homes** by size (1-bed to 4-bed) and type (flats and houses) to reflect needs; and
4. An **allocations mechanism** for some housing to go towards local workers in hard to recruit to sectors, and/or other specified workers at the Campus (e.g. Local Lettings Plans).

How will we apply this ask?

Our ask is that 43%-50% of total homes provided (generally or on individual sites) should be affordable (sub-market) homes. This is more than current policy requires, with the evidence in this study justifying the need to deliver more affordable homes than is currently sought. In that context this basic ask is made of:

- Policy makers (e.g. Cambridge City Council, South Cambridgeshire Council, and in the future, the Cambridge Delivery Group), to help inform housing strategy and planning policies at both wider (e.g. Local Authority) and site-specific levels.
- Decision makers (e.g. Cambridge City Council, South Cambridgeshire Council, or others), to help inform decisions on planning applications.
- Developers, to inform discussions and/or agreements that CBC may explore on proposed housing developments.

Executive Summary

Housing Principles

Beyond the headline needs of our 'basic ask', we have identified preferences that are important to how and where CBC workers live. Addressing these through housing delivery will help CBC to attract and retain the workforce required to maintain its status as it grows in a globally competitive environment. These have been distilled into principles for new development that CBC wish to see implemented.

Our Housing Principles and Placemaking Asks

1. **'Protected' affordable housing delivery** in new development (i.e. forming a primary component) meeting our 'basic ask' with a minimum total of 43% affordable (sub-market) homes specifically for CBC workers/professions.
2. Market homes for sale and rent which **meet workers aspirations** for gardens, parking and more space.
3. Support for **well designed, built, managed and maintained** homes.
4. Housing development in locations which can **capitalise upon and enhance accessibility** to the Campus.
5. Development and growth should be **close to, or provide, amenities** (e.g. shops, healthcare, schools, parks) to make sustainable communities and places.
6. Development and growth should provide for a **diversity of housing options** by tenure, type, size and location. CBC will support for sites or growth strategies which meet a range of CBC's housing needs.

How will we apply this ask?

These general principles reinforce the existing placemaking asks contained within policy, evidencing how these factors are specifically important to CBC workers and how they wish to live. This ask is made of policy makers, decision takers and developers/development, as a set of general principles that new housing development should follow, where seeking to meet CBC workers' housing needs.

A 'Specific Ask' of Strategic Sites

Strategic sites, defined in this study as those accommodating 250 or more homes, will have a significant role to play in meeting Cambridge's housing needs. This study identifies a 'specific ask' of strategic sites. Where strategic development comes forward justified by, or pursuant to, the housing needs of CBC workers, that development should meet the specific housing needs of CBC workers. This ask acts as a starting point to inform development on such sites, particularly where those developers seek to partner, or otherwise draw support from CBC, in order to make the case for their development.

Our starting principle is that the closer and more well related to CBC any strategic site is, the more it can – and should – do to help meet the specific housing needs of CBC workers. To generate this 'ask', we have identified housing catchments for the Campus, based on transport accessibility, and split those areas into broad 'central', 'middle' and 'wider' catchment areas, with a different ask applying to each. A summary of our ask and map of the broad catchments is shown on the following page.

How will we apply this ask?

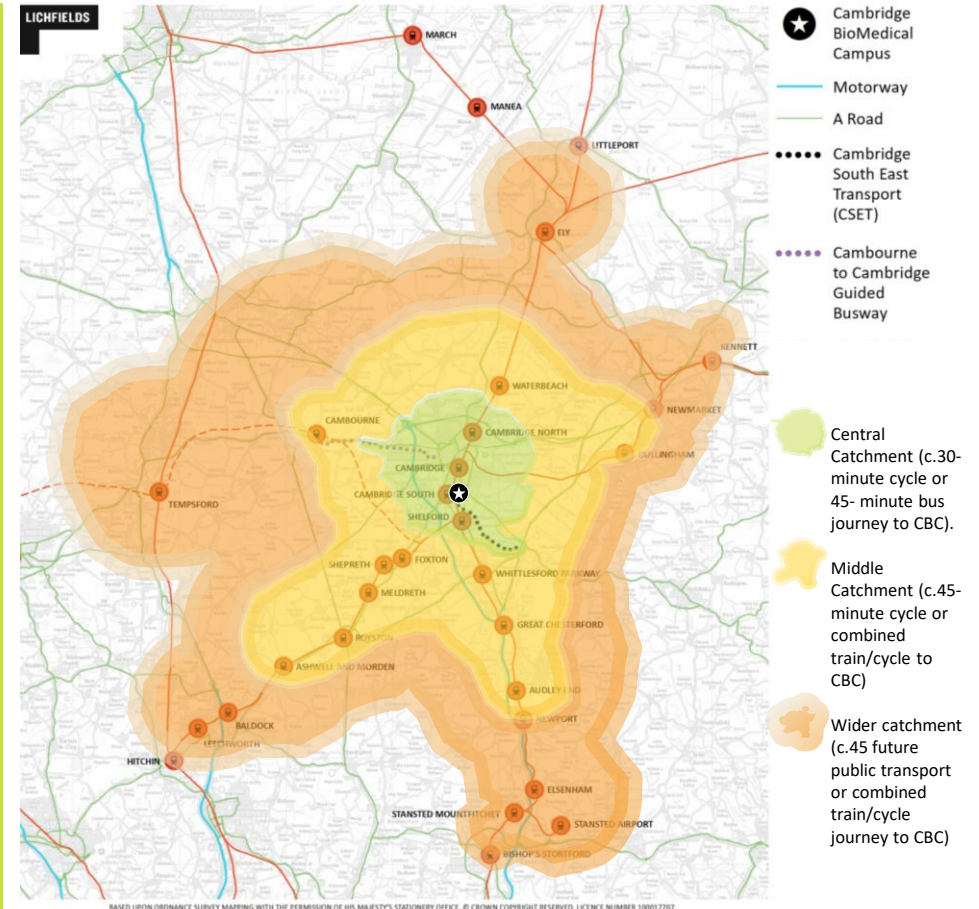
This 'ask' is primarily intended for developers where they seek to partner or draw support from CBC, setting out the circumstances in which CBC will consider there is benefit specifically to the Campus of proposed housing delivery. It also provides evidence to decision takers in reinforcing their core policy asks of developers and enhancing their ability to weigh up material factors in making decisions on specific schemes (including where they are linked to Campus housing needs).

Whilst the map illustrates potential catchment locations for development to meet CBC's housing needs, we would not rule out the specific ask being appropriately applied to opportunities beyond these identified locations; they should be applied flexibly based on principles of current or future accessibility to the Campus.

Executive Summary

Summary of our 'Specific Ask' of strategic sites

1. Sites closest to CBC, within our central catchment, should:
 - meet our 'basic ask' for affordable housing, and if in the Green Belt, provide enhanced levels of affordable housing (i.e. a proportion in excess of local policy requirements and CBC's minimum need of 43%) if the circumstances relied upon for development relate to CBC's needs, reflecting the acuteness and intensity of Campus workers housing needs at lower and middle incomes;
 - provide dedicated housing to meet (and be tied-to) one or more of CBC's specific housing needs (e.g. affordable/social rent, co-living/shared accommodation, build-to-rent or market housing for sale to CBC workers); and
 - commit to meeting principles around placemaking, accessibility enhancements and planning obligations.
2. Sites well connected but further away from CBC, within our middle catchment, may be suitable to meet our central catchment asks, but otherwise should:
 - reflect our 'basic ask' providing affordable homes suitable for CBC workers;
 - consider provision of housing to meet our specific housing needs of those in the biomedical sectors and professions; and
 - reflect our principles on placemaking and enhance accessibility to CBC.
3. Sites within a wider catchment and beyond should consider how the homes provided could help meet the needs and housing preferences of CBC workers or those in the biomedical sectors, whilst supporting enhancements in accessibility to CBC.



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Appendix 1: Survey and Results



1. Introduction

Introduction

This housing study has been prepared for Cambridge Biomedical Campus Ltd to explore the housing needs associated with workers at the Campus.

Cambridge Biomedical Campus

Cambridge Biomedical Campus (CBC) is the largest employment site in Cambridge. Combining world-class biomedical research, patient care and education on a single site, the Campus is currently the workplace for around 22,000 people.

Housing is an important, and growing, challenge for Campus organisations and businesses, impacting their workers in a major way and affecting the ability to recruit and retain the wide range of workers the Campus relies upon to thrive and deliver its nationally and globally important work. At the same time Cambridge and its wider hinterland is set to experience growth, with new places, housing and communities being delivered. In recognition of this, Cambridge Biomedical Campus Ltd has appointed Lichfields to prepare this housing study.

Purpose of Report

This report seeks to identify the affordable housing needs associated with Cambridge Biomedical Campus across its occupiers' employees. The report presents an assessment establishing affordable, and other, housing needs deriving from the Campus, evidencing the drivers of that need and providing a basis for policies which deliver the right quantity and type of new homes to meet the needs of campus employees.

The report provides a robust evidence base, for CBC and other stakeholder partners, to understand the needs of workers at the Campus, such that those needs can be considered and addressed through the planning system. It is recognised that the Campus is only one part of a wider Cambridge cluster of knowledge-intensive activity and is also only one part of the wider considerations of housing need across the area. Notwithstanding, CBC is a significant part of Cambridge, and by understanding the CBC-related housing needs, this report also provides a CBC 'ask' which CBC will use to inform its engagement with the planning system and with developers progressing housing sites and schemes near and/or well-connected to the Campus.

This work is intended to complement and inform, rather than displace, the work on housing needs that will be necessary to inform local spatial strategies and local planning policies within Local Plans.

Who we are

This report has been prepared by Lichfields on behalf of, and in close working with, Cambridge Biomedical Campus Limited.



Cambridge Biomedical Campus (CBC) Limited is a non-profit partnership of the organisations that call Cambridge Biomedical Campus home. It is not a landowner (albeit some of its constituent organisations are) but is formed to support the sustainable development of the site to keep it globally competitive as a centre for health, education and life sciences. It seeks to make the Campus a better place to work, visit and live beside.

LICHFIELDS

Lichfields is a planning and development consultancy. We operate from nine offices across the UK providing insight, innovative thinking and expert advice to create great places for the future. Our specialisms include undertaking housing need and housing market analysis for a wide range of organisations, housebuilders and authorities.

Approach

Our methodology combines housing market analysis, bespoke survey data and affordability modelling to identify housing needs and a ‘housing ask’ from CBC.

Our Overarching Approach

Our report reflects the approach we have taken to assessing the housing needs of CBC.

1. Our first step is to consider the **wider housing challenges of Cambridge** setting out the affordability of housing in Cambridge and South Cambridgeshire, how it has changed over time, and some of the core drivers of the housing market in the area. This provides context for considering the housing needs of CBC’s workers.
2. Our second step is to **understand the operation of Cambridge Biomedical Campus**, its occupiers, workforce, local services and its area of influence (where people commute from and the current and potential future transport links to the Campus).
3. Our third step is a **survey of CBC’s workforce** providing rich primary data on peoples housing circumstances, needs and preferences, as well as broader information on employee characteristics, travel preferences and attitudes to living arrangements. Full outputs from the survey are included at Appendix 1.
4. Our fourth step is to **identify the housing needs** of CBC employees, combining data on income profiles with affordability criteria to understand the scale of affordable housing need, including for different types and tenures.
5. Our last step is to take the previous contextual information, survey data and housing needs analysis and synthesize it into a **‘housing ask’ associated with CBC**, setting out CBC’s aspirations of housing to meet its employees needs. This also draws on best practice elsewhere in delivering housing to meet specific employee needs, whilst also providing a framework for CBC to ensure the housing needs associated with the Campus are advocated for through its wider engagement.

Stakeholder Engagement

The process of preparing this housing study has included engagement with stakeholders with an interest in the outcome of this housing study. In March 2024 a workshop was held at Cambridge Biomedical Campus to present emerging survey findings and discuss housing issues associated with the Campus. It was attended by officers/representatives of Cambridge City Council, South Cambridgeshire District Council, Cambridgeshire County Council, the Greater Cambridge Shared Planning Service, Cambridge & Peterborough Combined Authority, Homes England’s Cambridge Delivery Group, the University of Cambridge and Cambridge Ahead. The housing study has also been discussed and workshopped with CBC’s constituent organisations, ensuring it is reflecting the issues and difficulties those organisation are facing in respect of housing pressures on their employees.

Throughout this reporting process, no personal or identifiable details have been collected of any individual employee. Further, for reporting purposes, no sensitive workforce or employee data is provided at the organisation level. Instead, for the purpose of reporting all responses and consideration of housing needs have been segmented into the three key sectors present at the Campus:

1. Health [HEA] – those providing healthcare services, including the two NHS Foundation Trusts present on the Campus; Cambridge University Hospitals (including Addenbrookes and Rosie Hospitals) and Royal Papworth.

2. Education & Research [E&R] – those providing learning or undertaking research activity including the University of Cambridge and the Molecular Research Centre Laboratory of Molecular Biology.

3. Commercial Life Sciences [CLS] – companies operating in the research, development and manufacturing of pharmaceuticals and biomedical technologies, including Abcam and AstraZeneca.

2. Cambridge's Housing Challenges

Cambridge's Housing Challenges

Cambridge has been amongst the most successful economic areas nationally and internationally, although this does not come without challenges.

The 'Greater Cambridge' success story

To understand the housing challenges faced by CBC employees specifically, it is necessary to understand the wider context for Cambridge and South Cambridgeshire (also known as 'Greater Cambridge'). The area's unique blend of world-class **higher education**, a thriving tourist industry stemming from its rich history and successful **technology cluster** have supported long-term economic growth which has seen the city prosper, with amongst the highest productivity of any UK city. It is an important regional and national economic centre, and a desirable place to live and work. This is recognised in Government's 'Case for Cambridge' published in March 2024 and setting out Government's ambitions for the growth of the City.

Over the last 20 years job growth in Greater Cambridge has significantly outpaced the national and regional averages (Figure 1) and is a key driver of national economic growth, attracting both UK and overseas workers. Greater Cambridge has been described by Government as a "world-leading centre of research and innovation" with Cambridge often recognised as being the country's **centre of innovation** with more patent applications in the city than anywhere else. In July 2023, the Cambridge Delivery Group was established to oversee future growth of the city and ensure its full potential is realised.

Cambridge's economic success has also supported – and been supported by – a relatively **fast-growing housing** stock, with Greater Cambridge seeing nearly double the rate of housing growth over the last 20 years than has been seen regionally or nationally (Table 1).

Yet, despite its ability to outperform wider benchmarks, Greater Cambridge has not been without its challenges. With such strong economic growth, demand for housing has still **significantly outstripped supply** resulting in high house prices, rents and worsening affordability (factors explored later in this section). In this context, it is important that key employers – such as at CBC – have a clear understanding of their employee's housing needs in order to help achieve sustainable housing and economic growth in the region and to support Cambridge's future success.

Figure 1: Employment growth – 2003-23 (Source: Experian)

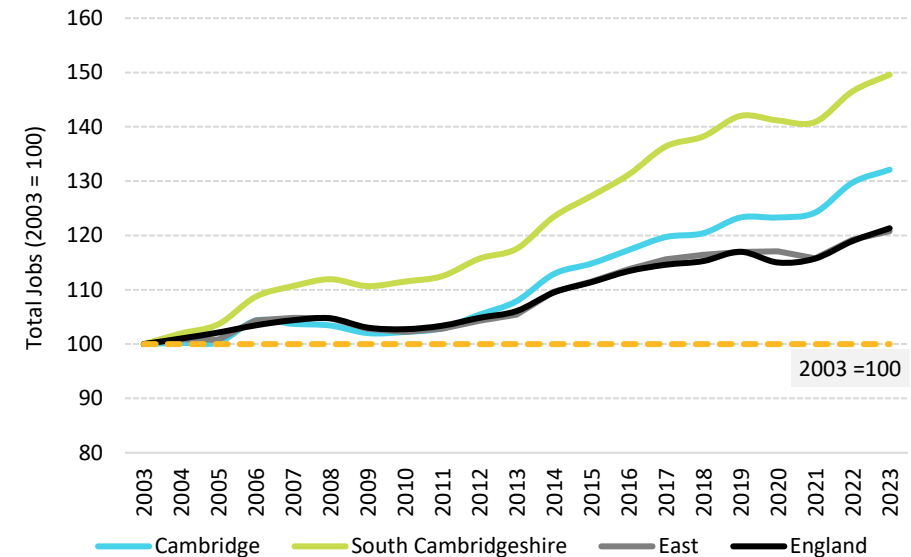


Table 1: Change in housing stock – 2001-21 (Source: ONS)

	2001	2021	Change	Change (%)	Average (pa)
Cambridge	43,445	56,411	12,966	29.8%	1.5%
S. Cambridgeshire	53,563	69,473	15,910	29.7%	1.5%
East	2,307,853	2,762,295	454,442	19.7%	1.0%
England	21,206,804	24,927,591	3,720,787	17.5%	0.9%

Cambridge's Housing Market

Whilst Cambridge has always been a desirable place to live, house price growth has notably outpaced wider averages, leading to worsening affordability.

House Prices

Regionally and nationally over the last 20 years, the rate of housing growth and economic growth have broadly been similar (both at c.20% over 20 years). Whilst housing growth in Greater Cambridge has been significantly higher than wider averages (closer to 30% over the last 20 years), this has been significant below the rate of economic growth, which has been c.30-50%. In short, housing growth in Greater Cambridge has simply **not kept pace** with economic growth.

In ‘The Case for Cambridge’ published by the Department for Levelling Up, Housing and Communities in March 2024, Government specifically cited the “*lack of housing*” in Cambridge as a factor “*jeopardising future growth*”. Yet, planning for housing in Greater Cambridge comes with a number of **specific local challenges**, including ensuring sufficient water supply, the need for supporting infrastructure, and the need to protect Cambridge’s Green Belt. The Councils will need to address these challenges in the preparation of the new Greater Cambridge Local Plan which will set the framework for future growth in the sub-region, and addressing housing needs will need to be a priority in future plan-making.

The significant disparity between housing and economic growth has been a key factor contributing to house price growth in Greater Cambridge. Whilst the area has always seen higher house prices than regional or national averages (Figure 2 and Table 2), this has **accelerated** over time, particularly in Cambridge itself. This growth in house prices has not been supported by commensurate growth in workplace earnings, resulting in significantly worsening affordability (which we turn to later in this section).

House prices in South Cambridgeshire are slightly lower than in Cambridge but are still substantially higher than wider comparators. As with Cambridge, house price growth has outpaced earnings growth, creating **affordability challenges**. A continued worsening of workplace-based affordability in Greater Cambridge will likely undermine sustainable economic growth, as workers – particularly lower paid workers – are less able to live close to their place of work, leading to unsustainable long-distance commuting.

Figure 2: Entry-level house price change – 2002-22 (Source: ONS)

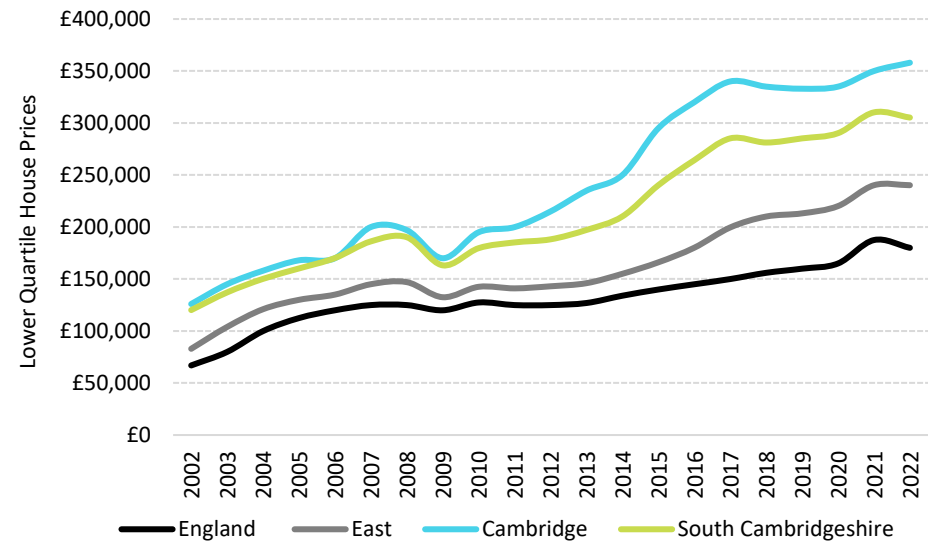


Table 2: Entry-level house price change – 2002-22 (Source: ONS)

	2022 Prices	20 year		10 year	
		Change	Change (%)	Change	Change (%)
Cambridge	£358,000	£232,000	+184%	£143,000	+67%
S. Cambridgeshire	£305,000	£185,000	+154%	£117,003	+62%
East	£240,000	£157,000	+189%	£97,000	+68%
England	£180,000	£113,000	+169%	£55,000	+44%

Cambridge's Housing Market

Poor housing affordability places increasing pressure on the private rented market, which plays an increasingly important role in Cambridge.

Rental Prices

A healthy supply of housing across all tenures, prices and types is a central facet of any efficiently functioning economy, ensuring that workers across all pay scales can live close to their place of work. Several factors influence Cambridge's rental market, including the presence of a large **student population** (at both the University of Cambridge and Anglia Ruskin University) as well as the city's **economic growth**, which is fueled by high-earning workers including those moving in from overseas.

It is vital that Greater Cambridge is able to maintain a good supply of private rented housing so that it can attract and retain these relatively more mobile and transient residents, for whom home ownership might not be a desirable or appropriate tenure. The private rented sector is also an **important tenure** option for households who cannot afford to get on the housing ladder (i.e. lower paid workers, including those in the health sector which make up a significant proportion of CBC workers), and who might rely on the private rented sector long-term to meet their needs.

As of 2023, entry-level rents across Greater Cambridge are **£1,000** per month with recent years seeing rents in South Cambridgeshire catching up to those seen in the city (Figure 3). In Cambridge, the rate of growth in monthly rents has **outpaced growth** seen regionally and nationally over the last ten years.

Within Cambridge, this entry-level rent is just sufficient to obtain an entry-level 1-bedroom home, with larger homes costing significantly more (Table 3). In South Cambridgeshire, entry-level rents are sufficient to obtain a 2-bed home. Although these sizes/types of homes will be sufficient to meet some housing needs (namely individuals living alone, two sharers or potentially some couples), they are limited in their ability to meet the **needs of families**. Families with children in Cambridge are likely to therefore require homes costing well in excess of £1,000 per month, highlighting the affordability pressures that exist in the private rented sector. When considering the housing needs associated with CBC employees, we have therefore taken into account the different needs of households, and their ability to afford renting the type of home they need.

Figure 3: Entry-level monthly rents change – 2013-23 (Source: ONS)

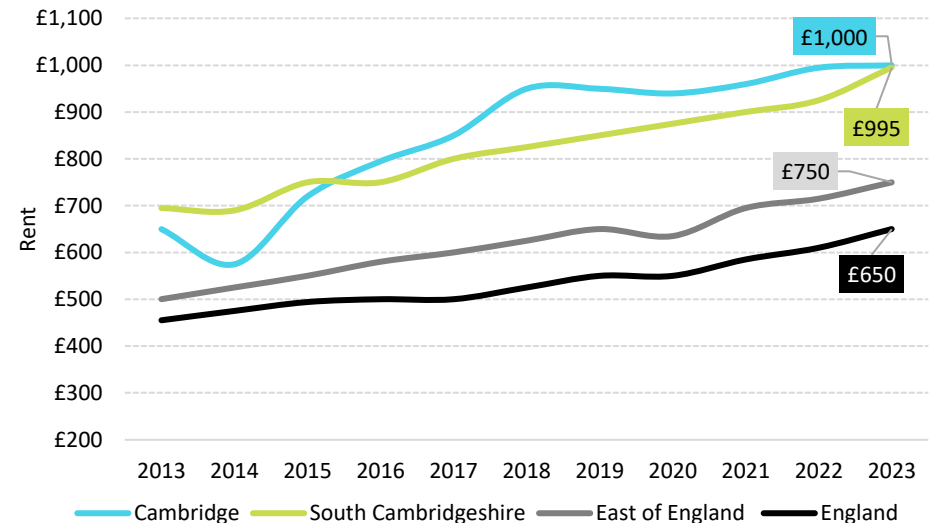


Table 3: Entry-level rents by size – September 2023 (Source: ONS)

	Cambridge			South Cambridgeshire		
	LQ	Median	UQ	LQ	Median	UQ
1-bed	£1,000	£1,175	£1,320	£800	£900	£1,000
2-bed	£1,255	£1,400	£1,600	£975	£1,145	£1,275
3-bed	£1,375	£1,550	£1,750	£1,075	£1,250	£1,400
4-bed	£1,850	£2,100	£2,550	£1,400	£1,600	£1,850

Housing Affordability

Cambridge has seen affordability worsen, with Health sector workers within CBC likely to face the greatest affordability pressures, owing to low earnings.

Affordability

Greater Cambridge

House price growth in Cambridge has **outpaced earnings growth**, meaning local workers face increasing difficulties in getting on the housing ladder. Even 10 years ago, Greater Cambridge was less affordable than regional and national comparators, with house prices in the city nearly 10 times local earnings in 2012 (Table 4). This has continued to worsen in the last decade, with an increasing disparity between affordability in Greater Cambridge compared with wider averages. Workers in Cambridge can now expect to see entry-level housing costing over 13 times earnings; this significantly **limits home ownership access** households who are not dual income and have a substantial deposit available.

Cambridge Biomedical Campus workers

CBC employers provided Lichfields with workforce data for the purposes of this research; this covered over 21,200 of CBC's staff across six major organisations. This included income profiles, which allow for a comparison of affordability issues faced by CBC workers and how these compared with wider averages.

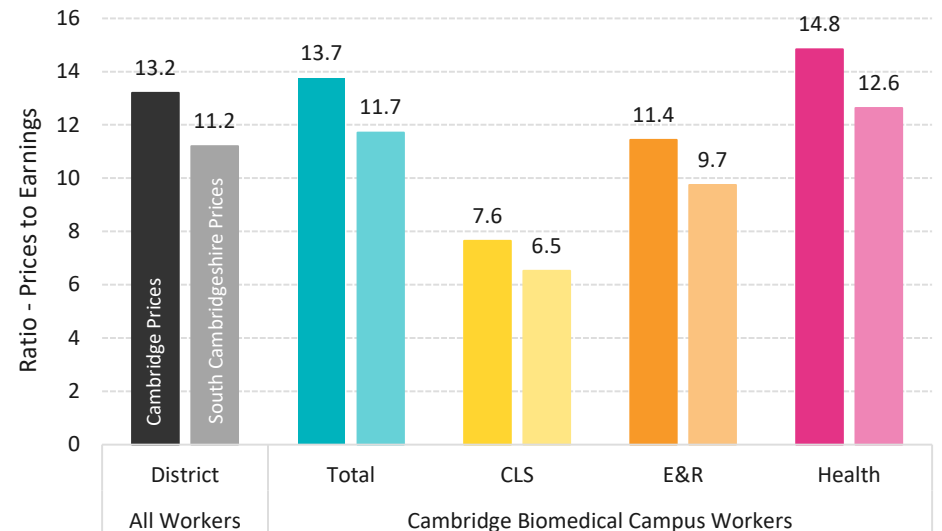
This shows that CBC workers have lower quartile earnings slightly below the wider district averages – c.£26,000 compared with c.£27,000. However, this **masks significant disparities** between the sectors. Lower quartile earnings range from just over £24,000 in the Health sector and £31,000 in Education and Research to nearly £47,000 in Commercial Life Sciences. The relatively low overall average for CBC is largely driven by the Health sector which currently makes up 70% of all workers at CBC.

These disparities in income across the campus mean that housing affordability challenges vary significantly between the sectors, as shown in Figure 4. Those in the Commercial Life Sciences sector would be expected to pay around 6-8 times their earnings to afford a home, whereas those in the Health sector would be expected to pay around 13-15 times their earnings.

Table 4: Entry-level housing affordability, workplace-based 2012-22 (Source: ONS)

	2012			2022			10-year change
	Prices	Earnings	Ratio	Prices	Earnings	Ratio	
Cambridge	£215,000	£22,517	9.5	£358,000	£27,040	13.2	39%
S. Cambridgeshire	£187,998	£22,413	8.4	£305,000	£27,269	11.2	33%
East	£143,000	£18,881	7.6	£240,000	£24,254	9.9	31%
England	£125,000	£19,011	6.6	£180,000	£24,429	7.4	12%

Figure 4: Housing affordability, district and CBC (Source: ONS, CBC employers)



Demographics

Cambridge's population has been amongst the fastest growing nationally over the last 20 years, driven by growth in the number of younger people.

Population Growth

Mirroring its strong economic and housing growth, Cambridge has seen its population grow by over one-third between 2001 and 2021 to 146,000 people (Figure 5). This rate of growth far exceeds the regional and national averages. Across Greater Cambridge as a whole, there are currently nearly 308,000 residents.

Cambridge has seen a notably different profile of population growth when compared with wider average (Table 5). Population growth has been significantly skewed towards younger age groups, whereas older age groups have seen the slowest growth. This reflects the general city/urban nature of Cambridge, but also the rapid growth amongst younger people, driven by growth in students and workers. By contrast, national trends have seen fairly limited growth in children (0-18) and younger workers (19-44) over the last 20 years, with older age groups being the fastest growing, reflecting an ageing society.

Population growth in South Cambridgeshire has been slightly different, with the district seeing more growth in older age groups. This is likely to be a result of the migration dynamics that exist across Greater Cambridge, where younger people move from Cambridge to the surrounding area as they age, start families, or retire, in search of more space, cheaper housing and a slower pace of life.

Figure 5: Total population growth 2001-21 (Source: ONS)

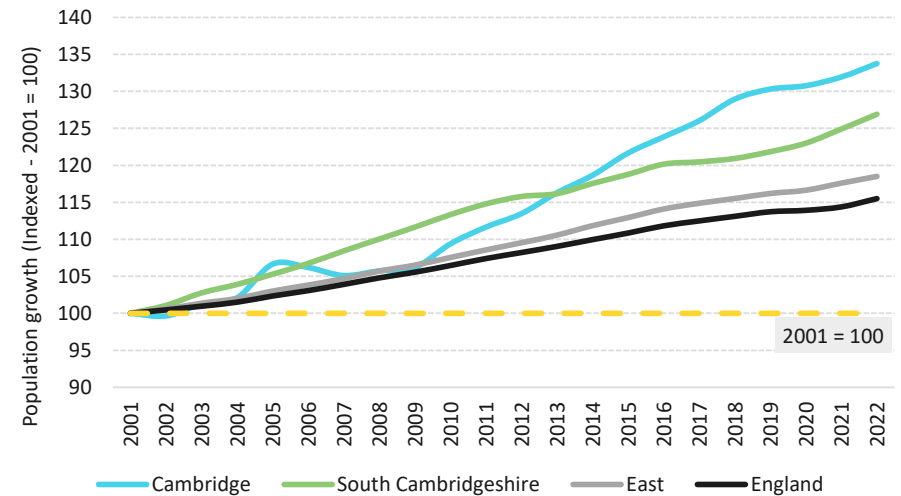


Table 5: Population growth rate by age group 2001-21 (Source: ONS)

	Cambridge	S. Cambridgeshire	East	England
0-18	31%	19%	9%	6%
19-44	38%	8%	7%	7%
45-64	38%	29%	25%	25%
65+	16%	66%	40%	33%
Total	34%	25%	18%	15%

Fastest growing LPAs - 2001-21

- 1 Tower Hamlets
- 2 City of London
- 3 Newham
- 4 Dartford
- 5 Peterborough
- 6 Milton Keynes
- 7 **Cambridge**

Cambridge's rate of population growth over the last 20 years puts it 7th nationally (out of 309 authorities), behind only London Boroughs, Dartford, Peterborough and Milton Keynes. These are also areas where population growth has been seen alongside high housing and strong economic growth.

ONS's population projections have typically been unreliable for estimating future growth in Cambridge, due to difficulties in accurately recording international migration. Going forward, Cambridge's population growth will continue to be driven by economic growth.

Local Plans

Future plan-making in Greater Cambridge will see a fully joined-up approach between the Councils, who face increasing pressure to deliver housing.

Current Local Plans

Adopted in 2018, the current local plans for Greater Cambridge (the Cambridge Local Plan and the South Cambridgeshire Local Plan) were prepared separately for each authority, but involved significant joint working during preparation and were also examined jointly. Collectively, they plan for 34,000 homes over the 2011-31 period, supporting 44,000 jobs (Table 6).

Table 6: Current planned housing and job growth 2011-31 – Greater Cambridge (Source: LPAs)

	Homes	Jobs
Cambridge	14,000	22,000
South Cambridgeshire	20,000	22,000
Greater Cambridge	34,000	44,000

A Future Local Plan

In 2018 the Councils formed Greater Cambridge Shared Planning (GCSP), now tasked with the preparation of a new and fully joined up local plan for the area. A 'First Conversation' consultation on the main themes and challenges was held in early 2020, and a 'First Proposals' consultation (Reg 18) was held in late 2021. Its key themes are shown in Figure 6.

Figure 6: Key Themes – Emerging Greater Cambridge Local Plan (Source: LPAs)



In January 2023, GSCP published a 'Development Strategy Update' which confirmed that further work undertaken by the Councils since the 'First Proposals' plan was published indicated that the anticipated levels of employment – and therefore required levels of housing – were likely to be higher than originally envisaged (Table 7). This new evidence suggested Greater Cambridge could see 66,000 additional jobs in the next 20 years (3,300 jobs per year, a growth rate of 1.4%). This highlights the continued strength of the Greater Cambridge economy in the future, as well as the ongoing housing challenges that are likely to exist as the Councils seek to find more homes to meet needs. The evidence suggests that 52,000 homes might be needed to support this economic growth, around 8,000 more than in the 'First Proposals' plan.

Table 7: Potential planned housing and job growth 2021-41 – Greater Cambridge (Source: LPAs)

	First Proposals		Development Strategy Update	
	Jobs	Homes	Jobs	Homes
Greater Cambridge	58,500	44,400	66,600	52,000

In March 2024, GCSP published an updated timetable for the preparation of its new local plan, which anticipated publication of a proposed submission (Reg 19) local plan in Autumn 2025, with submission to the Secretary of State in Summer/Autumn 2025. Through the new plan, GCSP will need to grapple with how to balance the delivery of homes and jobs, taking into account its new evidence of higher needs.



Jobs: Encourage a flourishing and mixed economy in which includes a wide range of jobs, while maintaining our area's global reputation for innovation.

Homes: Plan for enough housing to meet our needs, including significant quantities of housing that is affordable to rent and buy, and different kinds of homes to suit our diverse communities.

(Greater Cambridge Local Plan Aims)

Strategic Site Review

There is significant scope for affordable housing provision on existing strategic sites around Greater Cambridge to reflect CBC’s housing needs.

Current Strategic Sites

To understand the degree to which housing sites in Greater Cambridge might be able to help meet some of CBC’s housing needs, we have looked at the range of sites coming forward in Greater Cambridge under the current local plans (see Table 8 and Figure 7). These strategic sites are defined as having capacity for 250+ homes, used as a proxy for the scale of site at which a suitably diverse mix of homes could include meeting specific CBC housing needs. We have categorised these strategic sites based on their position in the planning system.

- **Category A** sites are allocated in the current Local Plans which have outline permission, where some (or all) units have yet to received detailed permission. This includes Cambourne West, Waterbeach, Northstowe and Cambridge East, and amounts to **24,000** homes across 9 sites.
- **Category B** sites are allocated sites which have yet to received outline permission. There are two sites within Category B; Bourn Airfield and the Clifton Road Area – which comprises **4,000** homes.

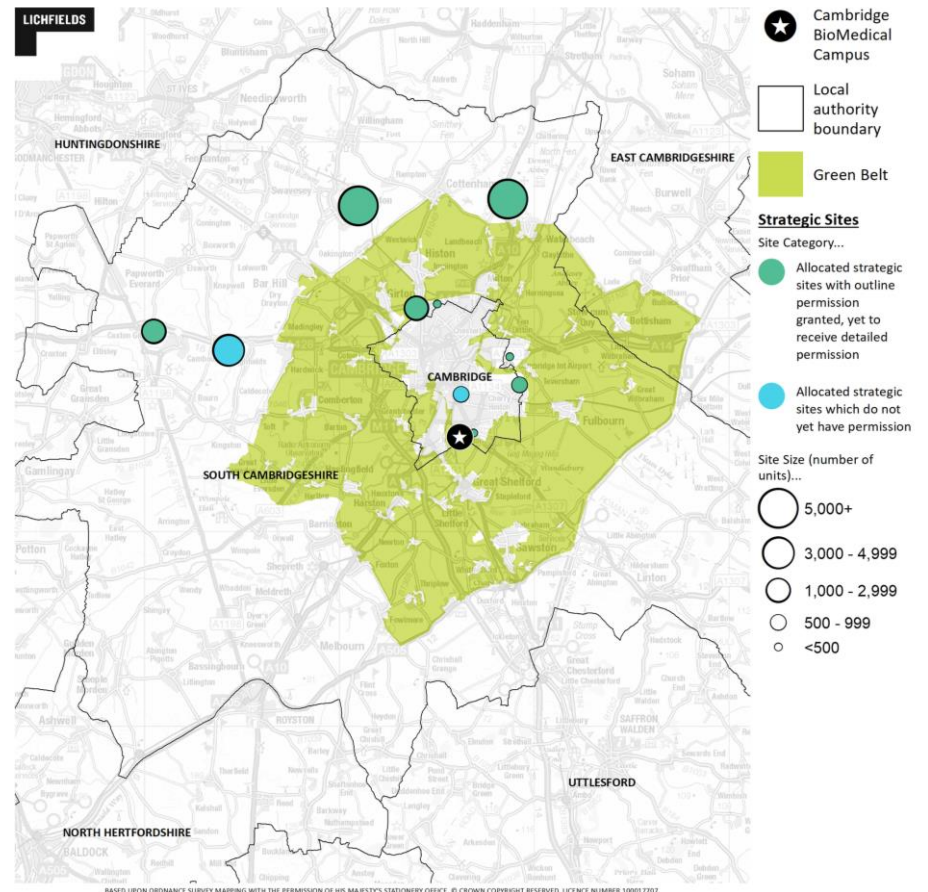
This suggests there is significant scope for the provision of affordable housing in the short term to reflect and support CBC’s housing needs. CBC’s needs could be reflected on these sites, via engagement, feeding into the future submission of reserved matters applications that will specify the precise housing mix and delivery.

Section 3 of this report reviews the transport links that exist in/around Cambridge, including to CBC specifically, in order to identify catchments and created a tailored ‘ask’ based on sites which might be best-placed to meet housing needs.

Table 8: Sites and units by category (Source: Lichfields)

	Number of sites	Number of units
Category A	8	24,000
Category B	2	4,000

Figure 7: Current strategic sites (Source: Lichfields)



Strategic Site Review

There is significant scope in the long term, through the new local plan, for CBC's needs to influence affordable housing provision around Greater Cambridge.

Future Strategic Sites

To understand the degree to which future housing sites in Greater Cambridge might be able to help meet some of CBC's housing needs, we have looked at the range of sites that might come forward in Greater Cambridge (see Table 9 and Figure 8).

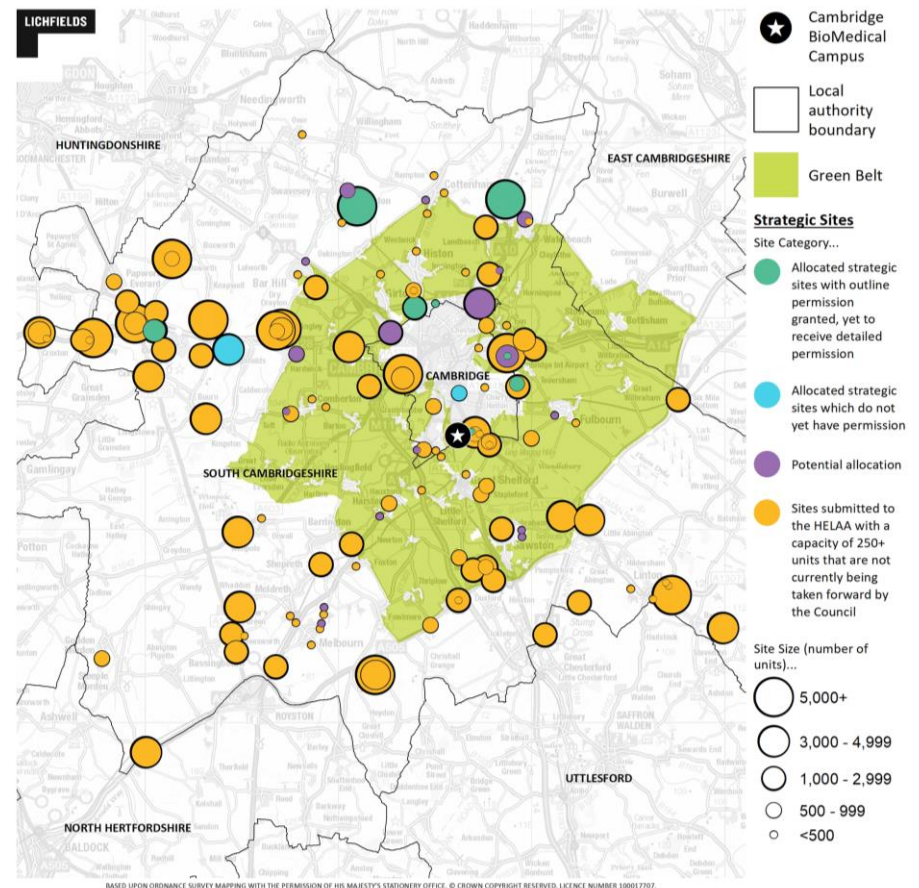
- **Category C** – potential allocations in the emerging Greater Cambridge Plan, that are either proposed allocations or which are not allocated but considered 'suitable' by the Council (i.e. sites that might be drawn upon if the Councils are required to find more sites in the future). These include extensions to development which have already been allocated (in the current plan), including at Cambourne and North-West Cambridge and total **11,000** homes.
- **Category D** comprises sites assessed by the Council as part of the emerging Greater Cambridge Plan but not currently being taken forward by the Council, amounting to **204,000** units.

Given uncertainty on the quantum of housing to be included in the emerging GCLP and/or other growth strategies that may emerge, there is scope for CBC to engage with those potential suitable sites and work with the land promoters at an early stage to effect provision of affordable housing within those sites in the event they are brought forward through planning. It is unlikely all sites in the HELAA (e.g. Category D sites) will be required, however, they illustrate the spatial options for growth available to plan makers to meet any future growth aspirations for Cambridge.

Table 9: Sites and units by category (Source: Lichfields [Cat C]/Landstack [Cat D])

	Number of sites	Number of units
Category C	17	11,000
Category D	115	204,000

Figure 8: Potential future strategic sites (Source: Lichfields)



3. Cambridge Biomedical Campus

Cambridge Biomedical Campus

CBC is home to 22,000 workers. Housing pressures are an issue affecting the quality of life of those workers, as well as an issue for recruitment and retention of staff.

Context

Cambridge Biomedical Campus

Cambridge Biomedical Campus is host to 22,000 workers within employer organisations including: Abcam, AstraZeneca, Cambridge University Hospitals NHS Foundation Trust, Cambridgeshire and Peterborough NHS Foundation Trust, GlaxoSmithKline, MRC Laboratory of Molecular Biology, Royal Papworth Hospital NHS Foundation Trust and the University of Cambridge, alongside many other smaller organisations.

The Campus combines world-class biomedical research, patient care and education on a single site, with the confluence and collaboration of scientists, researchers, doctors and academics working to tackle some of most significant healthcare challenges facing the world's populations. To grow that ecosystem, Cambridge Biomedical Campus prepared a CBC Vision 2050¹, foreseeing the growth of the campus to keep it at forefront of globally significant research and development.

Why is Housing an issue for CBC?

The Campus comprises a mix of old and new buildings, primarily in healthcare, education and commercial uses. The Campus itself provides little in the way of housing or accommodation, with that provision limited to several hundred rooms and flats provided by Sanctuary Housing as key-worker accommodation for NHS employees and student accommodation for those studying/practicing at the Campus. Yet housing is a big issue for CBC and the scale of workforce creates a significant interaction with the wider housing market that the Campus sits within.

Anecdotally, housing and its availability and affordability in Cambridge is creating issues for CBC occupiers, with CBC's Vision 2050, identifying: *“CBC is a major employment site, with key workers, scientists, and business people commuting every day. Many travel long distances and are squeezed out of the city by high housing costs. These pressures can have detrimental effects on the institutions, who*

struggle to retain key staff, and communities: pushing up house prices, creating congestion and generally impacting the quality of life of local people.”

Such potential barriers are recognised by the National Planning Policy Framework (NPPF) which sets out that *“Planning policies should seek to address potential barriers to investment, such as inadequate infrastructure, services or housing, or a poor environment”* and that *“Planning policies and decisions should recognise and address the specific locational requirements of different sectors. This includes making provision for clusters or networks of knowledge and data-driven, creative or high technology industries”* (paras 86/87). CBC is a prime example of needing to ensure sufficient infrastructure, services and housing to support a high-value cluster.

Previous Studies

The housing needs of CBC have been looked at before, albeit in a discrete manner. In 2020, Savills on behalf of Cambridge University Hospitals NHS Foundation Trust (CUH) published ‘Assessing the Housing Need of Hospital Workers’². This just looked at CUH employees, but found 2,466 priority group households in need of affordable housing. This informed a CUH strategy entitled ‘Delivering Affordable Housing for our Hospital Workers: The Case for Change’³ where CUH set out its aspiration for housing that its staff need, at prices they can afford and in locations which reduce commuting times.

¹ CBC Vision 2050, published 2021, available <https://www.cbc-vision.co.uk/s/CBC-Vision-2050-Autumn-2021-update>

² Assessing the Housing Need of Hospital Workers, Savills/CUH, published 2020

³ Delivering Affordable Housing for our Hospital Workers: The Case for Change, CUH, published 2020

Who Works at CBC

The majority of workers at CBC are in the health sector. Median incomes are similar to Cambridge as a whole, but the workforce at CBC is younger.

Workforce Data

We canvassed CBC Ltd organisations to collect information about the number, age distribution, salary distribution and residence of their workers. This has enabled us to build up a reasonably accurate picture of who works at the Campus, albeit it does exclude some organisations with a smaller presence at the Campus.

In total CBC Ltd organisations comprise more than 21,200 employees, around 95% of the more than 22,000 workers present at the Campus in total. Cambridge University Hospital is the largest employer (c.60% of staff), and health remains the largest sectoral employer at 71% of CBC's workers.

Overall, the median annual income of employees at CBC is £36,000, which is similar to Cambridge (£35,000) and South Cambridgeshire (£37,000) as a whole, but this varies by sector, with those in the health sector having significantly lower incomes than those in commercial life sciences. Splitting the data into under and over 40's, there is a slight overall difference, with those under 40 having a median income of £34,000, but this driven largely by the health sector; in Commercial Life Sciences under 40's earn on average £53,000, 19% below the median for the sector, but remaining well above the CBC average.

The age of worker at CBC is generally younger than across Greater Cambridge. There is a greater proportion of employees in the 26-50 age brackets, suggesting the importance of 'young professional' and 'family' type housing in meeting needs.

Table 10: CBC Employees and Incomes by Sector (Source: CBC Organisations)

Organisation/Sector	Number of employees		Median Income
Health	15,029	71%	£31,000
Education and Research	3,402	16%	£39,000
Commercial Life Sciences	2,796	13%	£65,000
Total/All	21,227	100%	£36,000

Figure 9: Income Distribution by Sector (Source: CBC Organisations)

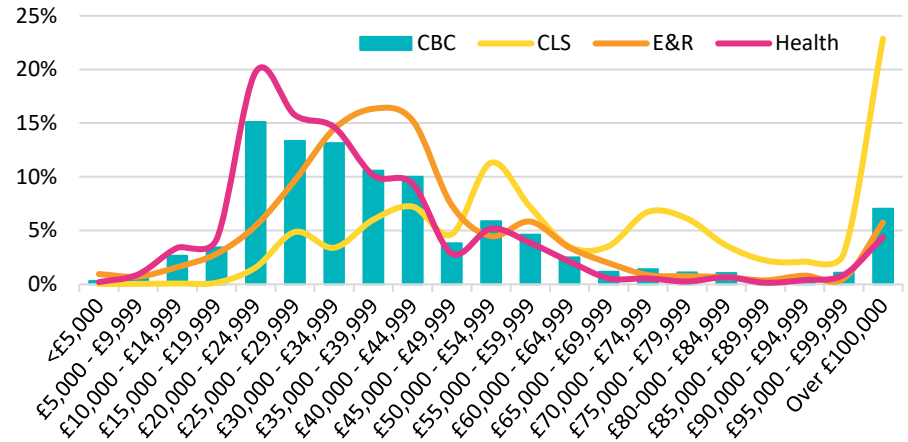
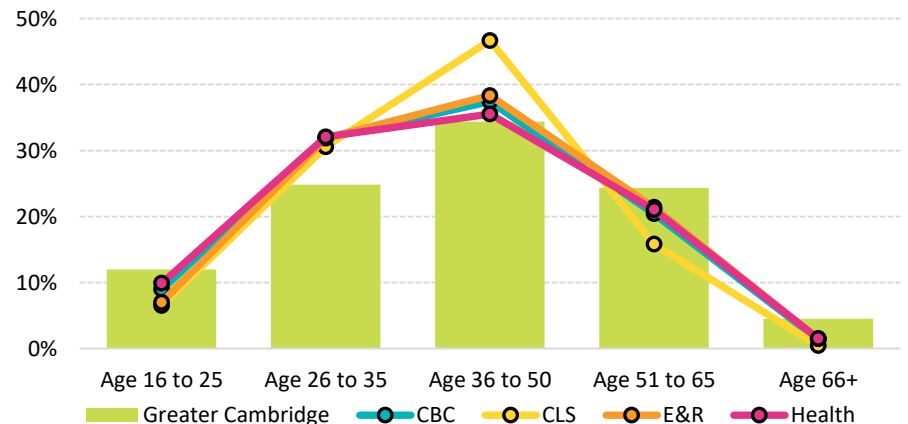


Figure 10: Age - CBC and Greater Cambridge (Source: CBC Organisations, Census 2021)



Where CBC Workers Live

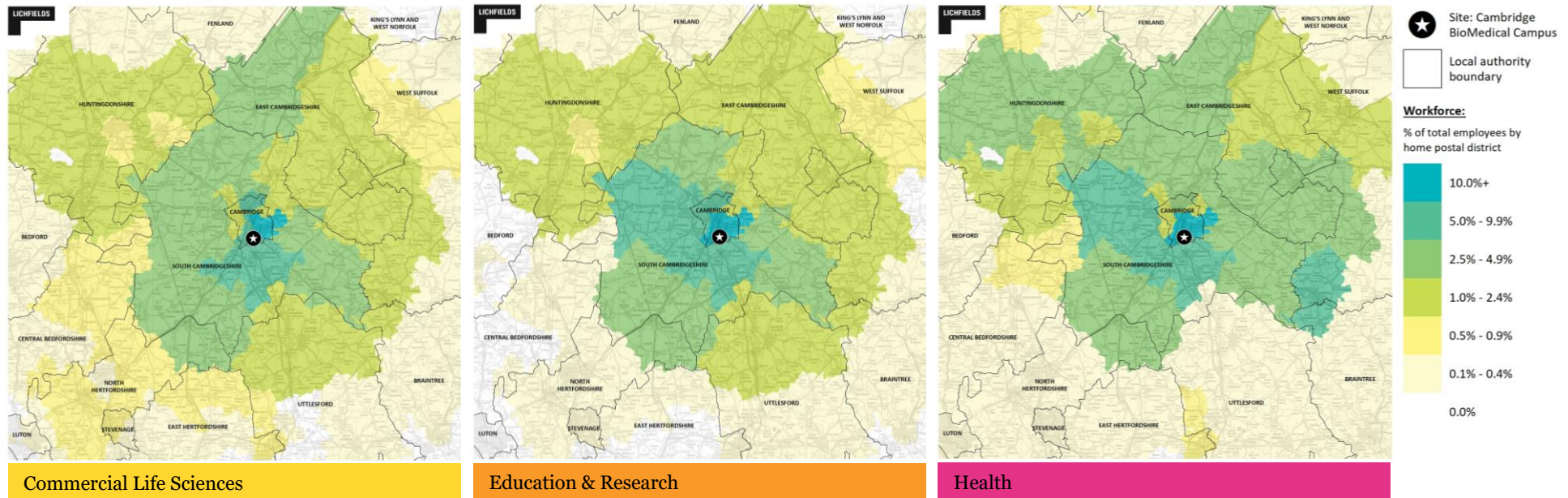
Nearly 60% of workers live in/around Cambridge, whilst 80% of workers travel from within a 30km radius.

Travel to work areas

Most workers at CBC live within or around Cambridge itself, but the CBC travel to work area extends around 30km from the Campus, with 80% of the workforce drawn from this area that also covers Newmarket, Haverhill, Royston, Huntingdon and Ely.

The Commercial Life Sciences sector has the largest travel to work area from CBC, perhaps reflecting greater choice/purchasing power and an older workforce (reflecting their relative life stage) whilst the health sector has the smallest catchment, meaning despite their relatively lower incomes, they tend to be drawn from the least affordable areas. This highlights the importance of affordable housing nearby CBC.

Figure 11: Cambridge Biomedical Campus Labour Catchment Areas (Source: CBC Survey)



Supporting Social Infrastructure

CBC is serviced by a wide range of social infrastructure within walking distance of the Campus, reinforcing the importance of local facilities to successful places.

Social Infrastructure

Social infrastructure is an important pillar of placemaking for CBC. The Campus and its environs are serviced by a range of social infrastructure including schools, healthcare facilities and community facilities, with the majority of these in neighbourhoods around the Campus, rather than on the Campus itself (see Figure 12). Accessibility to such key local services is essential and we know CBC employees value having social infrastructure embedded in their communities both close to home and work. Nearby to the Campus is the following:

Education: Within a short walking/cycling distance of the Campus (and in line with general walking catchments for such facilities in the Local Plan) there are three Early Years providers (two on Campus), nine primary and six secondary schools.

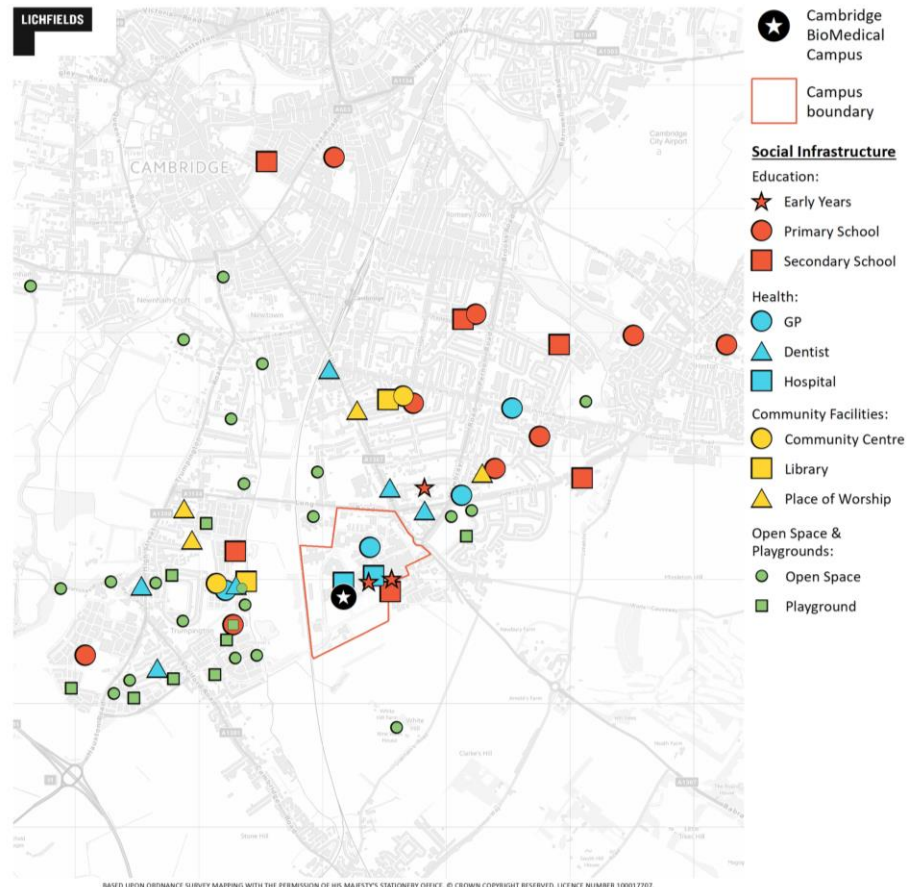
Healthcare Provision: Within 30 minutes walk of CBC there are four GP surgeries and six dental surgeries. The Campus is home to two hospitals, Addenbrookes and the Royal Papworth Hospital.

Community Facilities: The Cambridge Community Centres Strategy (2011) and South Area Ward Profile (2019) identifies a range of community facilities which are available within 30-minute walking distance of CBC.

Open Space and Playgrounds: The map indicates the distribution of open, recreational and play spaces within a 45 minute walking distance catchment of CBC, which extends to Trumpington, Queen Edith and Cherry Hinton wards.

These facilities and infrastructure serve the communities immediately around CBC, available for those who live close to the Campus and/or work on the Campus. Such essential social infrastructure is important for how workers live their daily lives; dropping off a toddler at nursery on the way to work, picking up a pint of milk on the way home, accessing local healthcare. Providing for such needs, both close to the Campus and in the communities where CBC workers live – as well as continuing to enhance the social infrastructure on the Campus itself – underpins successful, thriving and inclusive places.

Figure 12: Cambridge Biomedical Campus Social Infrastructure Map



Existing Transport Accessibility to CBC

Accessibility is a key consideration to where workers live. CBC is well connected to Greater Cambridge through pedestrian and cycle routes.

Travel Catchments

The ability to access Cambridge Biomedical Campus has a big influence on where CBC workers choose to live. Whilst the Campus draws its workforce from a wide catchment, it is desirable and sustainable to provide for peoples housing needs in locations where there is a choice of how to travel to the Campus, and in locations which reduce the reliance on car commuting by providing genuine options for Active Travel (walking, wheeling and cycling) or use of public transport.

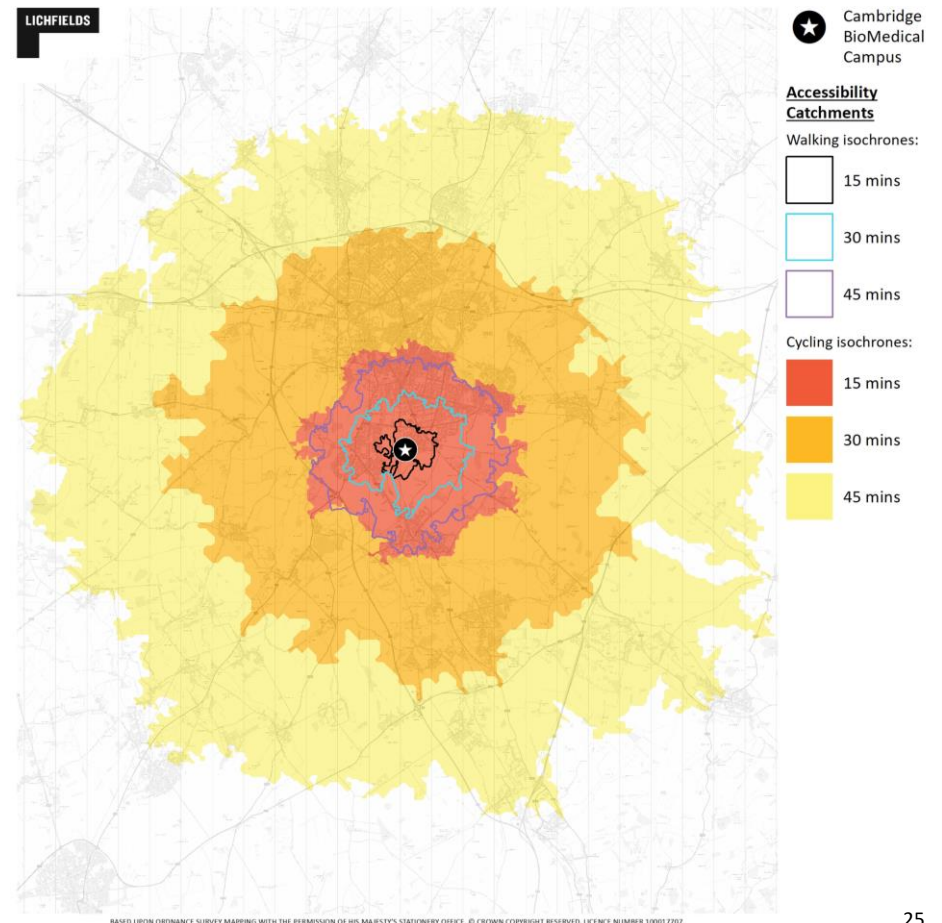
We have considered the likely catchment of CBC – its area of likely housing influence – with reference to its current and future transport accessibility. We have reviewed current accessibility by different modes as well as analysed what it could be in the future once planned transport improvements are operational. This has informed the areas of housing influence we identify, for the purposes of considering how growth can help meet CBC’s housing needs.

Walking and Cycling

CBC is linked to the rest of Cambridge by a large number of designated cycle paths and cycle lanes.

The map in Figure 13 opposite presents areas within a 45-minute walk or cycle catchment from CBC. These include Cambridge Rail Station, Cambridge City Centre and Trumpington Park and Ride. A catchment of 45 minutes cycle can reach smaller towns and neighbourhoods further afield in the Greater Cambridge area, such as Eddington, Impington and, at the outer limit, Waterbeach.

Figure 13: Cambridge Biomedical Campus Accessibility Catchments Map: Walking and Cycling



Existing Transport Accessibility to CBC

A range of public transport options are available within a 45-minute catchment of the Campus.

Current Public Transport Accessibility

The map in Figure 14 opposite presents areas accessible within 45 minutes by public transport from CBC, principally bus services but also train stations.

The buses that serve CBC include the Guided Busway and the Park and Ride services (Trumpington and Babraham Road stations are those closest to CBC). Routes U1 and U2 are subsidised by the University and go from Eddington via West Cambridge, the City Centre and Cambridge rail station to CBC. 'A the Busway' goes from Trumpington to Central Cambridge and St Ives via the city centre and the rail station, stopping at CBC. These bus routes are represented by the public transport isochrones on Figure 14.

By bus, from CBC, Cambridge railway station is 4 minutes away, Trumpington Park and Ride is 6 minutes, and Cambridge City Centre is 16 minutes away. These key destinations lie within a 45-minute public transport catchment, as Figure 14 demonstrates.

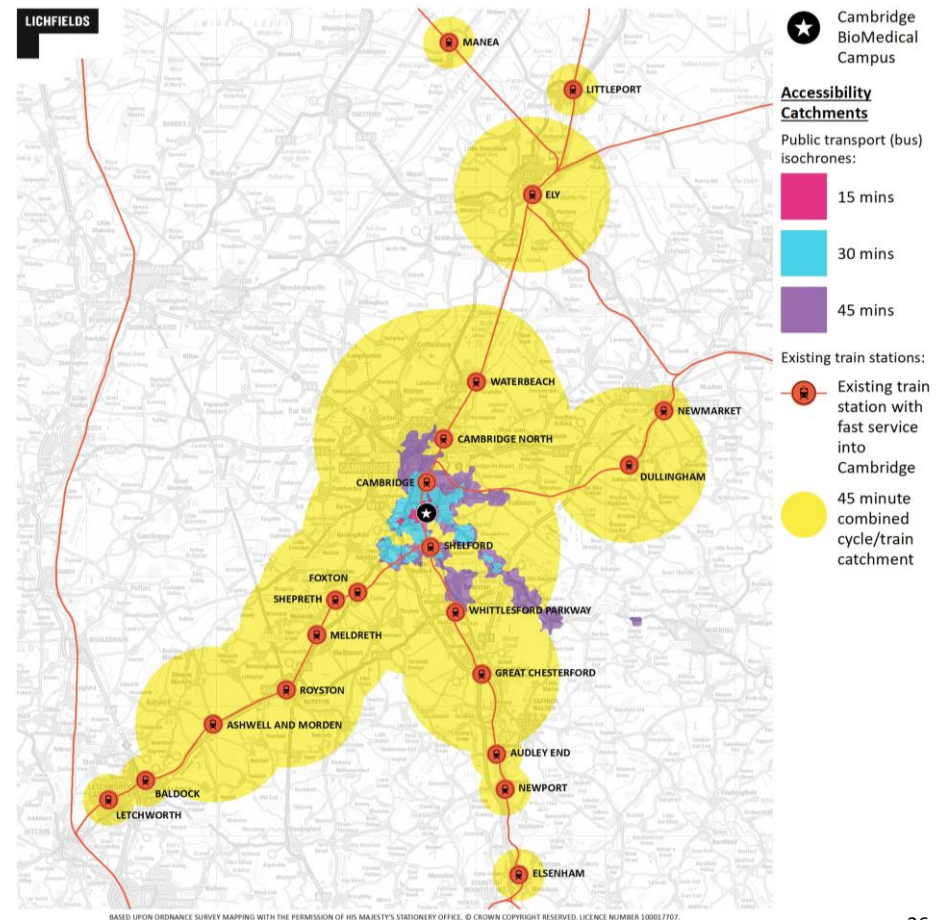
There are currently two railway stations in Cambridge: Cambridge and Cambridge North (near Cambridge Science Park). Cambridge South is currently under construction. These lie within a 45-minute combined cycle and train catchment (as indicated by the yellow shading).

From Cambridge Railway Station, by train:

- Stansted Airport is 40 minutes away.
- London King's Cross is 48 minutes away.
- London Liverpool Street is 72 minutes away.

Figure 14 demonstrates that nearby commuter towns such as Baldock, Shepreth, Foxton and Ely lie within a 45-minute combined cycle and train catchment and are serviced by fast train services into Cambridge Rail Station.

Figure 14: Cambridge Biomedical Campus Accessibility Catchments Map: Public Transport



Future Transport and Accessibility Enhancements

Future transport initiatives in Cambridge present opportunities to improve connectivity to the Campus from a larger geographical scope.

Changing Travel Catchments

There are several future transport schemes which are in the pipeline in Greater Cambridge that will create future opportunities for CBC employees and Cambridge residents, as well as increase CBC's catchment and reach, improving accessibility and connectivity to the Campus from a wider geographical scope. This is illustrated by Figure 15 opposite. Schemes include the following.

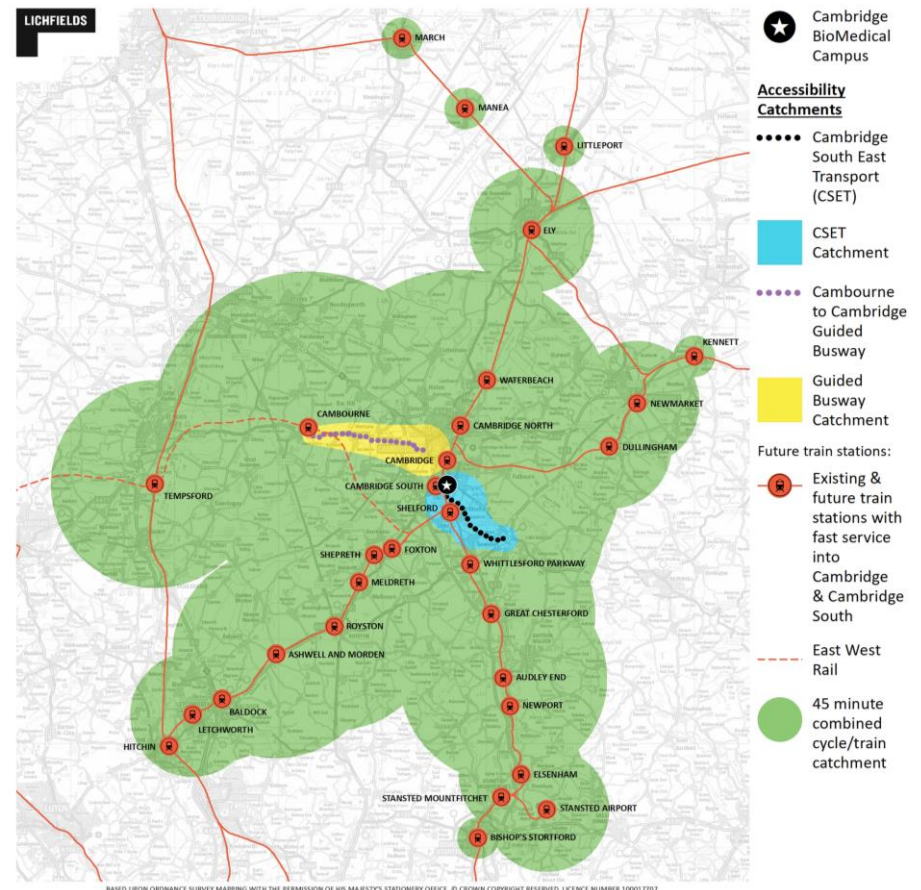
Cambridge South Station: A new station, Cambridge South, is being constructed on the existing railway line where it runs along the western edge of the Campus. The new station will connect the CBC directly with destinations including London, Stansted Airport, and Birmingham. In the future, EWR services from Bedford to Cambridge could serve the new station. Removing the need to interchange for a bus at Cambridge station, Cambridge South will significantly extend the 45-minute accessibility catchment to the Campus.

East-West Rail (EWR): This new line will connect people in the towns and villages between Oxford, Milton Keynes, Bedford and Cambridge with those employment centres. The Bedford to Cambridge section would cut travel times by up to 40 minutes for people living in Bedford who want to travel to Cambridge. Today, journeys between the two are 1h20 by bus or 2hrs by train. EWR will reduce this to just 35 minutes by train.

Cambridge South East Transport: The proposed new public transport route would link the Cambridge Biomedical Campus via Great Shelford, Stapleford and Sawston to a new travel hub near the A11/A1307 with connections to the Babraham Research Campus and Granta Park. At CBC, the route would run on prioritised public transport lanes on Francis Crick Avenue, connecting to the existing Busway and enabling services to continue to the station and Cambridge City Centre.

Guided Busway: Cambourne to Cambridge: The Cambourne to Cambridge (C2C) project is a new guided busway route proposed to link Cambourne to Cambridge via the new Bourn Airfield development, a new Travel Hub at Scotland Farm, Hardwick and the West Cambridge campus.

Figure 15: Cambridge Biomedical Campus: Future Transport and Accessibility Enhancements



Proposed Future Growth of CBC

Expansion of the Campus will drive future needs. Workforce growth of 18,000 jobs at the Campus is envisioned, the majority in Commercial Life Science.

Future Expansion

Cambridge Biomedical Campus is set to grow over the next 20-30 years. There are both plans relating to the development of the existing Campus as well as to its potential expansion. These are at various stages of the planning process, including immediate new buildings which have planning applications, areas allocated within the Local Plans for future expansion, and potential new areas of further growth subject to their allocation being agreed in future Local Plans.

CBC Ltd has been working with landowners to inform the development of a new spatial framework to describe the approach to developing a world class Campus over the next 20 years. Subject to decisions which are part of the local planning process concerning land owned by Cambridge County Council, the Campus has the potential to grow to a total floorspace or more than 1.6 million square metres. The associated workforce estimate projects growth in the number of people working at the Campus from 22,000 currently to 40,000 once expansion is complete.

We canvassed existing occupiers on their own growth plans at the Campus:

- Cambridge University Hospitals is progressing its Addenbrooke's 3 modernisation programme, including a new Cambridge Children's Hospital and a new Cambridge Cancer Research Hospital, with an estimated increase of c.400 healthcare staff.
- As part of the Spring Budget 2024 it was announced that AstraZeneca would be investing £650m in the UK to expand their footprint, including on CBC, with complementary funding announced by Government to support the development of the Campus.
- The majority of the remainder of the growth is anticipated to be new businesses/ occupiers on the Campus, with an expectation this would be mainly in the Commercial Life Sciences sector through the expansion of office/lab space.

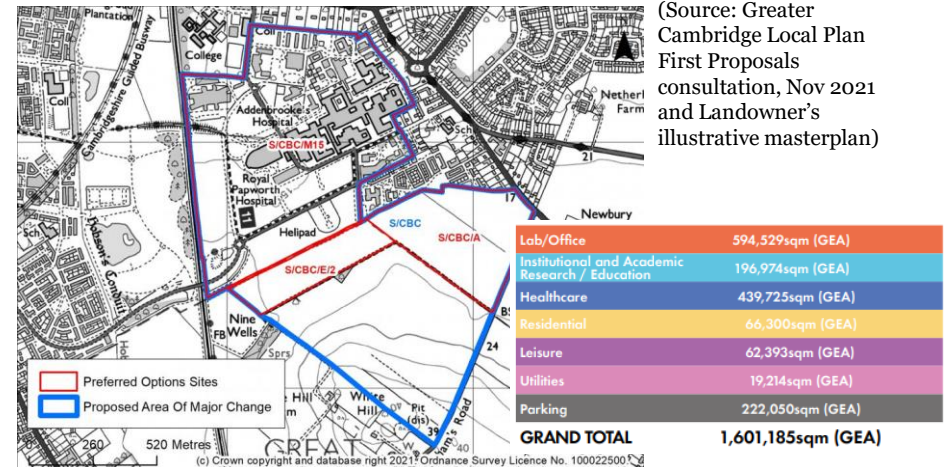
Growth in the Campus is an important consideration for future housing needs. It is imperative our housing report reflects not just the needs of current workers, but how housing needs arising from the campus might change in the future, and how housing can play a supporting role in achieving those growth aspirations. To that end this

study adopts an anticipated split of workforce growth between sectors as set out in Table 12, which apportions job growth based on the growth in floorspace envisioned in the landowner's holistic spatial framework. Our study extrapolates our identified current housing needs to the additional c.18,000 employees associated with campus expansion, to understand how future growth of CBC might impact future housing needs.

Table 12: Estimated Job Growth by Sector at CBC (Source: CBC Ltd/Lichfields Analysis)

Organisation/Sector	Jobs 2025-2050	%
Health	+5,000	67%
Education and Research	+1,000	27%
Commercial Life Sciences	+12,000	6%

Figure 16: Expansion areas considered and landowner's masterplan envisaged total floorspace (Source: Greater Cambridge Local Plan First Proposals consultation, Nov 2021 and Landowner's illustrative masterplan)



4. Survey Findings

Our Housing Needs Survey

To inform this study a survey of employees was conducted, which has given 2,761 responses to analyse, equivalent to 12.5% of the entire Campus workforce.

Survey Introduction

We undertook a survey of employees based at the Cambridge Biomedical Campus, asking questions on people's employment, housing and transport circumstances. It sought to understand more about employees' preferences for how and where they live, and what is important to them in those decisions. This survey and its results are included at Appendix 1 to this report. In this section we present the headline survey findings from our analysis of the responses.

The survey was conducted across December 2023 to February 2024. It was conducted online and circulated/communicated internally by each CBC organisation to their workforce at the Campus (e.g. via all staff mailing lists and/or intranets).

The exception to this is Cambridge University Hospitals (CUH), who already had such data from a previous survey of its staff undertaken. Our survey was designed to be deliberately identical to this previous survey undertaken by CUH, such that our survey data could be combined with the earlier CUH survey data to provide a comprehensive picture of housing needs across the entire Campus. CUH, in lieu of circulating the new survey, provided us with access to their previous survey data.

Table 13: Survey Respondents by Sector (Source: CBC Survey)

Sector	No. Respondents	%
■ HEA – Health	1,973	71%
■ E&R – Education & Research	385	14%
■ CLS – Commercial Life Sciences	403	15%
■ Total	2,761	100%

Response Rate and Representativeness

A total of 850 employees at the CBC organisations responded to the survey (10.1% response rate). Added to the previous CUH survey response, 2,761 responses were analysed in total, equivalent to 12.5% of the entire workforce at CBC.

In Lichfields' experience of undertaking such housing need surveys this represents a very strong response rate. Further, in order to ensure the survey represented a reasonable cross-section of workers at CBC we compared the profile of response by income, age and home location with earlier workforce data collated from the organisations themselves, which showed a good match (i.e. the two were entirely comparable). This has led us to conclude the survey is reasonably representative of workers at CBC and that it provides a robust basis for presenting generalised findings.

Notwithstanding, we are aware that one limitation of the approach adopted is that the survey, and evidence base it provides, is circumscribed to staff directly employed by CBC Ltd member organisations. Some occupiers and/or employees based at the Campus (e.g. GSK, Ambulance Service, NHS Blood & Transport) are not included in our survey data, neither are people working for member organisations through outsourced/contracted services (e.g. agency cleaning staff or self-employed contractors). Therefore, we know this work for CBC will likely understate the level of affordable housing needs of the campus in its entirety, particularly as many such services are likely to be at the lower-end of the income spectrum across the Campus.

Although likely only excluding a small proportion of overall workers at the Campus, and therefore in our view not unduly affecting the overall conclusions of this study, CBC Ltd consider it is important to reflect and represent such needs and will look to update this work in the future to reflect this.

Survey Findings – Employees

A diverse range of employees work at CBC from those just starting out, to long-term and senior staff. International workers are around 29% of the workforce.

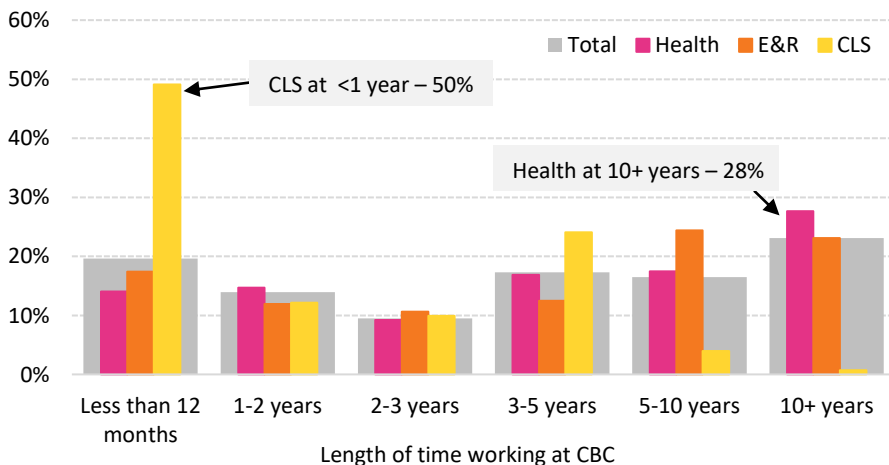
Employment at CBC

The survey responses cover a range of employee types. The vast majority of respondents (85%) were on permanent contracts, with a smaller proportion (12%) on fixed term contracts, whilst the survey also has representation from trainees (both medical and non-medical), apprentices and a small number of contractors.

Looking at the length of time people have been employed at CBC, this is longest in the health sector and shortest in commercial life sciences, mirroring the length of time different organisations have been present on the campus.

The survey further captures a mix of full time (84%) and part-time (16%) workers, whilst reflecting a range of staff groupings, most commonly nursing/midwifery, admin/clerical and professional/scientific/technical careers.

Figure 17: Length of time at CBC by Sector (Source: CBC Survey)



Employee Characteristics

The survey responses present a wide range of employee characteristics. In respect of the age of respondent, the most common age banding for respondents were 26-30 and 31-35. When compared with workforce data directly from the CBC organisations, the survey respondents skew younger, with a greater proportionate response from those 26-35, perhaps reflecting that those are the age groups and life stages where housing issues are most acutely felt. Notwithstanding there remains a wide response from those aged 21-25 through to those aged 61-65.

Looking at nationality of the respondent, 71% were UK nationals, 16% were EU nationals and 13% were other nationalities. By sector, both education and research, and commercial life sciences had a greater proportion of international worker respondents (36% and 34% respectively), albeit with commercial life sciences particularly drawing workers from the EU over the rest of the world, but the position more balanced in the education and research sector.

The survey respondents skewed towards slightly lower incomes than the workforce data directly from the CBC organisations, suggesting respondents with lower incomes were more likely to respond to the survey. Notwithstanding the survey includes good representation from the overall profile of incomes across CBC, with respondents from across all income bandings.

Median salary band of survey respondents:

- Health - £25-30k
- Education and Research - £40-45k
- Commercial Life Sciences - £50-55k

The majority of respondents (45%) indicated they were main earner in their household, with similar numbers of respondents indicating the earnt around the same or earnt less (24% and 25% respectively).

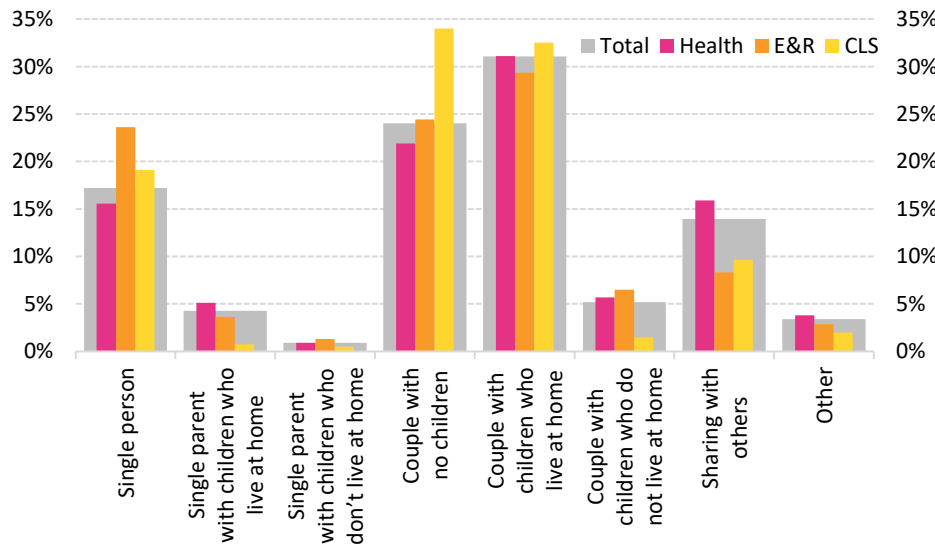
Survey Findings – Housing Arrangements

A diverse worker base is also reflected in diverse housing arrangements. There is an even split between workers renting and owning their home.

Living Arrangements

Current living arrangements of workers at CBC show a range of different circumstances, each likely to drive a need for different types of housing according with different life stages or individual living preferences. Slightly more than 40% of workers are in single person or couple households, whilst slightly more than 35% of workers are single persons or couples living with children ('families'). Couples with no children (e.g. 'young professionals') are particularly prevalent within the Commercial Life Sciences sector. A smaller but still significant proportion of workers (14%) are sharing their living arrangements with others (e.g. house-shares or communal accommodation), with this particularly a factor in the health sector.

Figure 18: Household Composition of CBC Workers (Source: CBC Survey)



Current Housing Situation

There is an even split between renting and ownership tenures among CBC workers. Homeowners paying a mortgage is the most prevalent housing situation (37%), albeit 35% of workers are meeting their accommodation needs in the private rented sector. A small proportion of workers are renting from a housing association or the Council (6%) illustrating that only an overall small proportion of CBC workers are actually accessing affordable rented housing, mainly from the health, and education and research sectors. 7% of workers, including people from across all sectors, are living with family, either through choice or through circumstance (e.g. inability to affordably access other housing options).

Figure 19: Current Housing Situation of CBC Workers (Source: CBC Survey)



Survey Findings – Housing Happiness

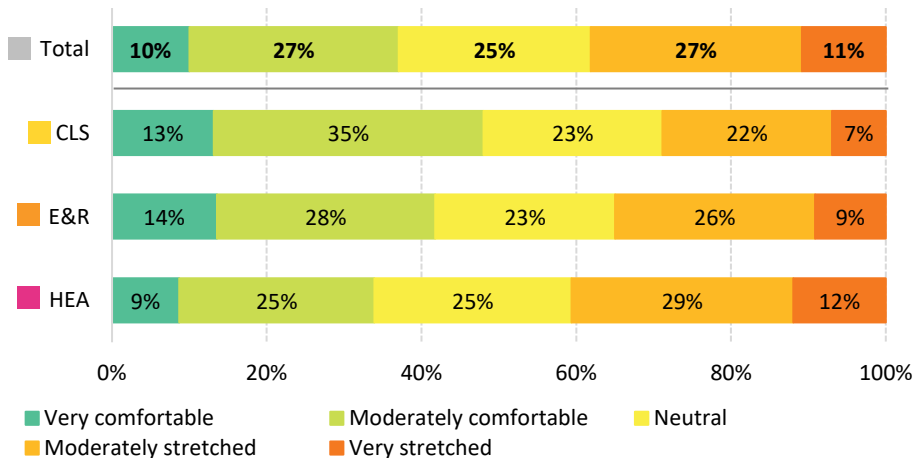
38% of CBC workers describe their ability to meet housing costs as ‘moderately’ or ‘very’ stretched, whilst 22% are dissatisfied with their accommodation.

Housing Affordability

To consider how ‘affordable’ workers feel their housing costs are, we asked workers how they would describe their ability to meet their current housing costs. Overall, 38% of workers described this as ‘stretched’; 27% as ‘moderately stretched’ and 11% as ‘very stretched’. This highlights that at least 38% of workers are concerned about their housing costs.

Looking at this by sector, those in health are relatively more worried by their housing costs and affordability, with those in commercial life sciences relatively less (and education and research between the two). This, as perhaps expected, mirrors average incomes within the different sectors; 41% of healthcare workers, where our median surveyed income was £25-30k, indicated their ability to meet housing costs were stretched, whereas 29% of commercial life sciences workers indicated the same, with their median surveyed income of £50-55k.

Figure 20: Self-described ability to meet housing costs (Source: CBC Survey)

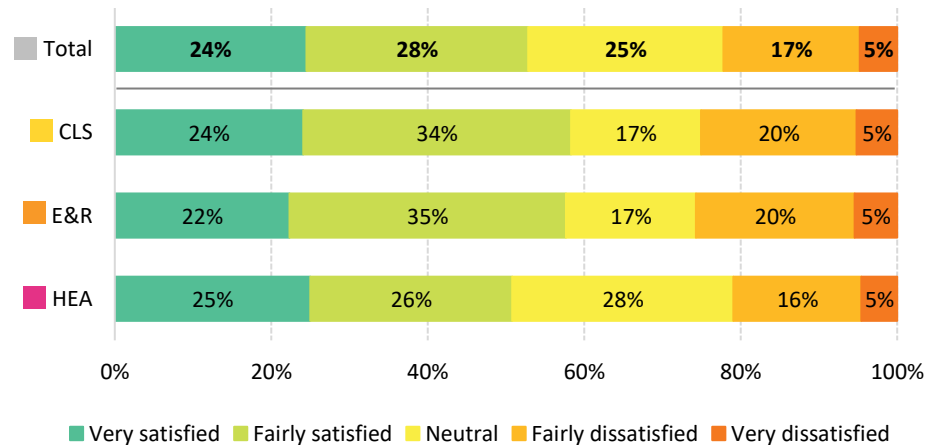


Housing Satisfaction

Housing satisfaction is not dissimilar to views on housing affordability, albeit at the upper end, more people appear to be satisfied with their housing. Satisfaction also appears to be more uniform across the sectors; 5% across all sectors are very dissatisfied with their accommodation, whilst 17% in total indicate they are fairly dissatisfied; but overall workers are more satisfied than not. Renters were far more likely to be dissatisfied than owner occupiers (42% vs. 12%).

Looking at the reasons for dissatisfaction, the overwhelming factor was that accommodation was ‘too expensive’, cited more than five times more often than the next closest factor. The most cited other factors were ‘poor commute to work’, ‘too small’ and ‘sharing with others’. Feedback from employees in the survey also covered a multitude of common issues, particularly in the private rented sector around maintenance, condition and security of tenure.

Figure 21: Self-described satisfaction with current accommodation (Source: CBC Survey)



Survey Findings – Commuting

Average commute length to CBC is 33 minutes. Together, walking, cycling and public transport are 60% of journeys, with a want for shorter, cheaper, commutes.

Commuting and Journey to Work Satisfaction

Whilst this study focuses on housing, commuting is an important consideration for workers on where and how they live, and we have used commuting data in considering the appropriate and sustainable travel-to-work catchment of CBC.

Overall average (median) commute length to CBC is c.33 minutes. Around 40% of workers drive to the Campus (34% car, 4% car sharing and 1% taxi), 16% walk, 23% cycle and 21% get public transport (17% bus/guided bus, 4% train). When workers drive, most often they park on the campus (53%) or at a park and ride (33%).

Looking at individual sectors, there are some specific commuting characteristics:

Health

- Average (median) commute c.30 minutes (shortest of the sectors)
- High walking (17%) and car use (41%), linked to concerns around public transport
- Least dissatisfaction with commute; 36% dissatisfied with commute
- Big concerns: **reliability** and **frequency** of public transport (for shift work)

Education & Research

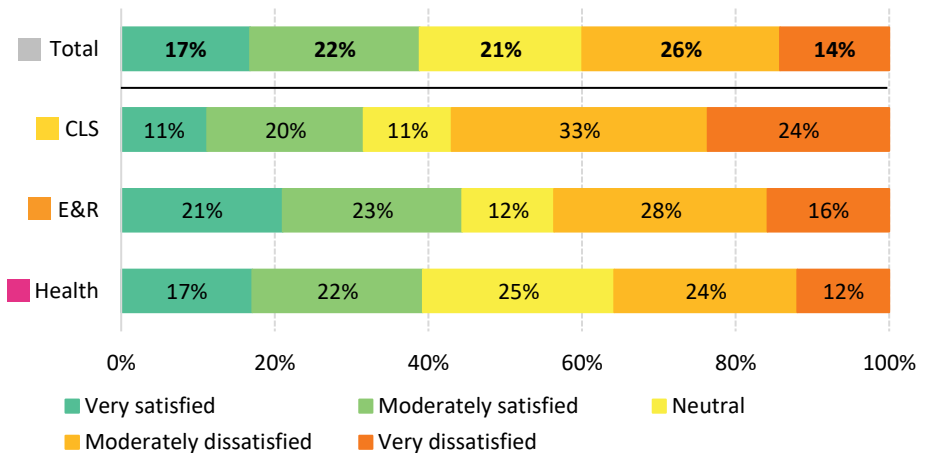
- Average (median) commute c.35 minutes
- High cycling prevalence (32%) and public transport (24%), low car use (32%)
- 44% dissatisfied with commute
- Big concerns: public transport **reliability**, commute **length** and **busyness**

Commercial Life Sciences

- Average (median) commute c.40 minutes; a quarter of workers travelling 1hr+
- Car use (39%) and public transport (24%) high, but lower active travel methods.
- High levels of dissatisfaction with commute (57%); typically live further away
- Big concerns: public transport **reliability**, lack of **parking**, commute **length**

Looking at satisfaction with their commute, 40% of workers at CBC expressed dissatisfaction whilst 39% indicated they were satisfied. Almost universally, the main reasons for dissatisfaction were the length of commute (i.e. too long) and the cost of commuting (i.e. too expensive), however, beyond that some of the big concerns in individual sectors varied (see left).

Figure 22: Self-described satisfaction with commute (Source: CBC Survey)



We also asked how important public transport to CBC and public transport to Cambridge city centre was to choices around where workers lived. 54% said public transport to CBC was 'very important' whilst 34% said it was 'moderately important', with transport to the Cambridge City centre only slightly below these levels.

Overall, this suggests workers value affordable and short commutes to CBC, with dissatisfaction increasing significantly the longer and more expensive a commute.

Survey Finding – Housing Preferences

CBC workers have varied housing aspirations, with preferences across type, tenure and location of new homes likely indicating a genuinely mixed housing solution.

Housing Needs and Aspirations

To understand what housing outcomes CBC workers aspire towards, we asked several questions around where and how employees wish to live.

The majority of workers consider a house is most suited to their needs (78%) with the remainder indicating a preference for a flat (22%). There was a split between the types of places and areas people wished to live in. 28% indicated a preference for an urban area (e.g. Cambridge City), 31% a suburban area (e.g. an estate on the edge of Cambridge), and 40% a rural area (e.g. the villages in the wider South Cambridgeshire area).

In terms of tenure and housing products, amongst respondents there was demand for a mix of shared ownership, rent to buy, affordable rent and private rented tenures, with only 30% indicating none of these would be attractive (presumably instead preferring home ownership).

Figure 23: Attractiveness of housing products; % who would consider (Source: CBC Survey)

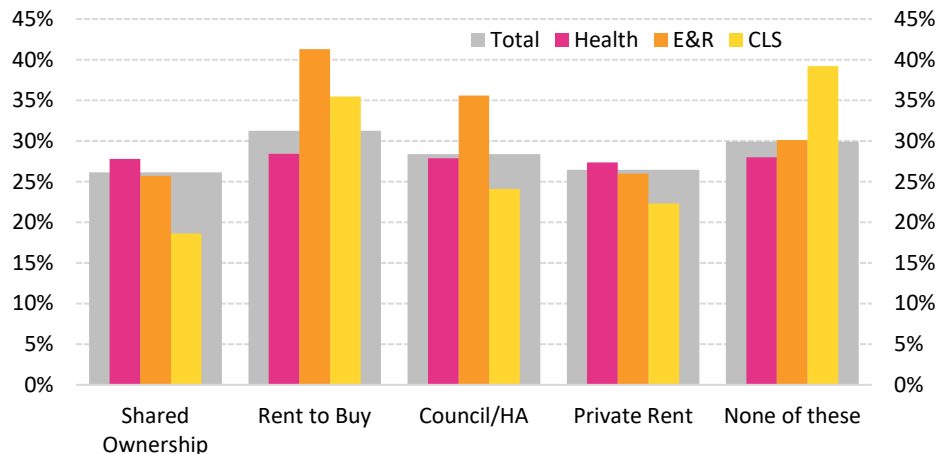
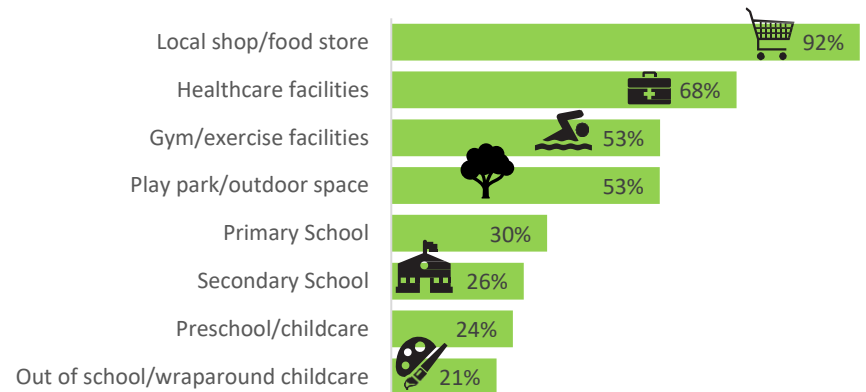


Figure 24: % who would like to see these amenities where they live (Source: CBC Survey)



Workers at CBC want live in places which have easy access to a local shop, local healthcare, a gym and outdoor space. School places and childcare considerations are important to around quarter of CBC workers (broadly matching those with children at home). In respect of specific features of their accommodation a garden (76%) and parking (72%) are two of the most important features, with almost half also wanting to have some outdoor storage.

Workers are generally either positive or neutral to living in area with neighbours who are also CBC workers; only 6% would find it a negative, meaning most workers would be happy living on a street of their Campus colleagues (e.g. as may be the case with some forms of specific provision for workers). However, most workers viewed living in shared accommodation with other CBC workers negatively, albeit with 3% 'very positive' and 6% 'positive' towards this form of living, indicating a (proportionally) small demand does exist for such accommodation.

Analysis of Survey Findings

The housing needs of CBC workers are highly varied, as would be expected in a population of 22,000 workers, but cost, location and transport are all issues.

Synthesis of Findings

Bringing together the survey findings across the various employment sectors present at the Campus, we summarise the overall findings and different outcomes for those individual as sectors as below. These have informed both our following assessment of housing needs stemming from the Campus, but also consideration of the 'housing ask' of how development can go about addressing those needs.

Overall	Health	Education & Research	Commercial Life Sciences
<p>Overall, among workers at the Campus:</p> <ul style="list-style-type: none">• There are concerns around housing affordability and ability to meet housing costs from a significant subset of workers.• Housing satisfaction is overall positive, but with a proportion dissatisfied.• Reasons for dissatisfaction stem largely from housing costs, living situations, and commutes to CBC (length and cost).• There is a mix of housing preferences (type, tenure and location) but overwhelmingly people want to live in places with good connections to the Campus and Cambridge city, and want to live in places with local amenities to meet their day-to-day needs.	<p>CBC workers in the health sector:</p> <ul style="list-style-type: none">• Generally, have lower incomes, are most likely to be 'stretched' in meeting housing costs and face the greatest affordability pressures.• Have highly varied housing situations, but with more neutral satisfaction ('making do'). Stability is important, reflecting longer employment tenures in the sector.• Have clear <u>aspirations to own via affordable routes</u> – high attractiveness to shared ownership and rent to buy.• See links to the campus/city as important, particularly considering nature of work (e.g. shifts).• Are more open to shared accommodation than others, but still low overall demand.	<p>CBC workers in the education and research sector:</p> <ul style="list-style-type: none">• Have a higher prevalence of outright ownership, but still with a significant proportion renting.• Are more likely to be single person and smaller households.• Identify key reasons for housing dissatisfaction as costs and poor commute.• Are the most positive towards living as neighbours to other CBC workers.• See <u>affordable rent</u> and rent-to-buy as popular, and have a preference to live in <u>urban/suburban</u> areas.• Commuting and city links are a key issue, suggesting broad need for smaller more urban forms of living.	<p>CBC workers in the commercial life sciences sector:</p> <ul style="list-style-type: none">• Are the highest earners and least likely to be 'stretched' in meeting housing costs but have the highest levels of dissatisfaction (greater expectations); too small, too expensive, poor public transport.• Have the longest commutes (high car use), and therefore least satisfied, with parking important.• Are most likely to be owners (mortgage) or private renters – few in other tenures.• Have a clear <u>aspiration to own</u>, but not the intermediate routes to ownership given – options to realise this in locations closer/better connected to the Campus would help meet needs (and recruitment/retention).

5. Housing Needs Assessment

Affordable Rented Needs

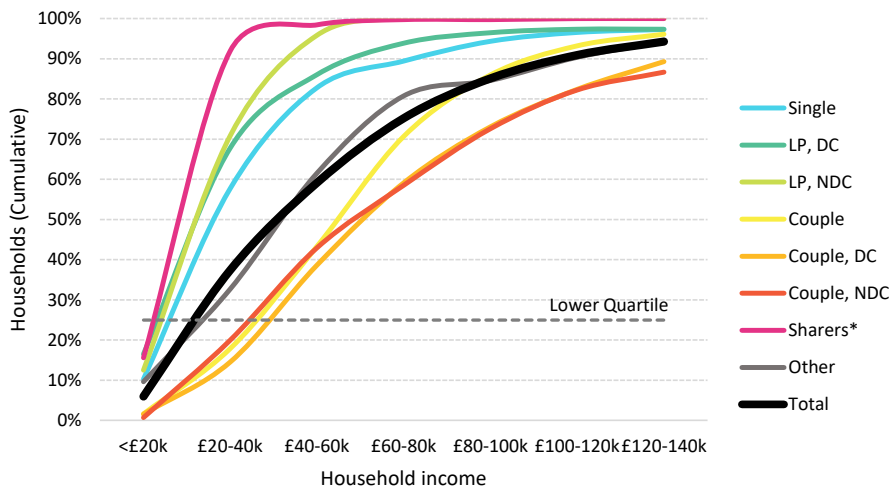
CBC workers cover a wide range of household types and incomes, each with different housing needs. 30% of CBC workers need affordable rented housing.

Household Incomes

To accurately assess the housing needs of CBC workers, it is important to recognise that different households have different income profiles and also different housing needs. Each household's ability to afford housing therefore depends both on their income and what type of household they are (e.g. a single person, a couple with children, etc).

A total of 2,500 survey respondents provided information on their overall household income (which could be used to determine their ability to afford housing) as well as their household composition; this is shown in Figure 25. Single earner households (singles, lone parents, etc) had a lower quartile household income of around £21,000 whilst dual earner households (couples) had an income of around £41,000.

Figure 25: Household Income by Household Type (Source: CBC Survey)



Note: LP = Lone Parent, DC = Dependent Children, NDC = Non-dependent children.
*For Sharers, individual income is used to avoid skewing the data and better reflect an individuals' need

Affordable Rented Needs

To assess affordable rented need, it is necessary to establish the minimum size of housing each household needs and therefore must be able to afford. These are shown in Table 14. For each size, we applied the average of lower quartile monthly rents for Cambridge and South Cambridgeshire, on the basis that the Campus is located on the boundary of these two areas and workers live in both areas.

The household income required to afford these rents – assuming one-third of income is spent on rent, in line with the Cambridgeshire SHMA – varies from £32,400 to £58,500. Using the income profile for each household type and scaling up the survey sample to the estimated total for CBC (22,000), it is estimated that **6,700 households – 30%** – cannot afford to rent in the open market. Our survey found that a relatively small proportion – just 6% – of CBC workers currently live in affordable rented housing, suggesting that the majority of affordable rented housing needs are currently unmet.

Table 14 also shows the overall split by bedroom type. The majority of need (63%) is for 1-beds, reflecting the fact that it is particularly difficult for single earner households to rent in Greater Cambridge. A further 30% of need is for 2-3 bed housing, catering to smaller families (couples and lone parents) with 1-2 children, or with children not currently living at home. 7% of affordable rented need is for larger families with 3+ children

Table 14: Affordable Rented Housing Need (Source: Lichfields based on ONS/CBC Survey)

	Needs	Cost to rent	Income required	Proportion unable to afford	Scaled up to total CBC	Split – bedrooms
Singles, Couples, Other	1-bed	£900	£32,400	33%	4,196	63%
Families - NDC/1 Child	2-bed	£1,115	£40,140	23%	1,102	16%
Families - 2 children	3-bed	£1,225	£44,100	26%	914	14%
Families - 3+ children	4-bed	£1,850	£58,500	43%	483	7%
Total	~	~	~	30%	6,694	~

Affordable Home Ownership

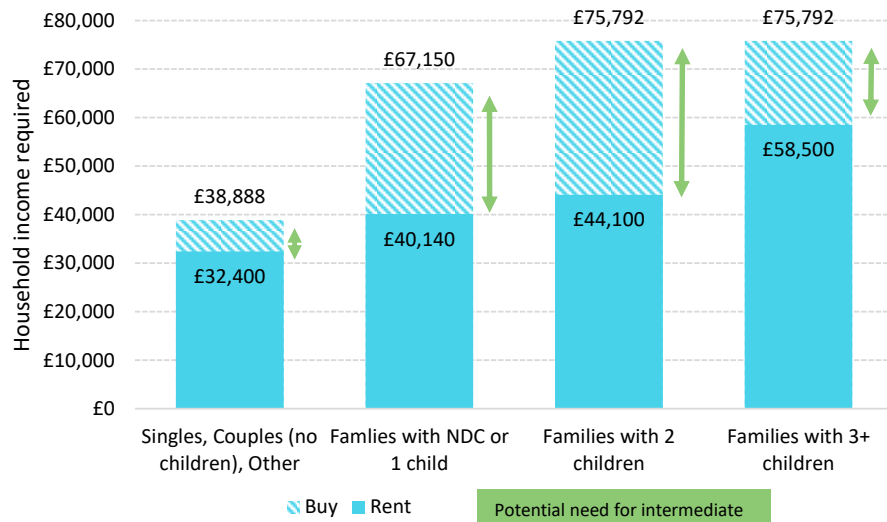
The bar for home ownership in Greater Cambridge is high, and an estimated 20% of all CBC workers can rent but unable access home ownership.

Affordability to Buy

National policy and guidance also recognises that affordable housing should cater to the need of those who cannot afford to buy in the market, where that is their aspiration. These types of affordable housing are also known as ‘intermediate’ and include shared ownership, discount market, rent-to-buy and other affordable routes to home ownership.

Based on the entry-level cost of buying various types of homes (flats, terraced homes, semi-detached homes) needed by different households, the household income required by each type to afford these is shown in Figure 26. Those falling in the ‘gap’ between renting and buying represent potential need for intermediate affordable housing; for example, for families with 2 children this potential need is any household with an income between £44,100 and £75,792.

Figure 26: Household Income by Household Type (Source: CBC Survey)



Potential Intermediate Need

The income profile for each household type is applied to the income thresholds to assess the number of households falling in the ‘gap’ between renting and buying. These results are then scaled up the survey sample to the estimated total number of workers at CBC (22,000). On this basis, it is estimated that **4,500** households – **20%** - can afford to rent in the open market but are unlikely to be able afford to buy (Table 15), in line with their needs.

The size mix of housing needed is more evenly spread (compared with the need for affordable rented housing), reflecting the fact that the bar for home ownership entry across Cambridge is relatively high, and even many dual income households will be unable to afford the cost of buying housing that they need. Most potential intermediate housing need is associated with smaller families with 1-2 children, who need homes with 2-3 bedrooms.

However, unlike with affordable rented housing, not all of these households will necessarily need intermediate housing, because they may prefer to remain in the private rented sector (for example, because they prefer the flexibility or renting suits their circumstances).

Table 15: Potential intermediate need (Source: Lichfields based on ONS/CBC Survey)

	Needs	Cost to buy	Income required	Proportion unable to afford	Scaled up to total CBC	Split
Singles, Couples, Other	Flat	£205,875	£38,888	13%	1,670	37%
Families - NDC/1 Child	Terrace	£355,500	£67,150	29%	1,403	32%
Families - 2 children	Semi	£401,253	£75,792	34%	1,186	27%
Families - 3+ children	Semi		17%	189	4%	
Total	~	~	~	20%	4,448	~

Affordable Home Ownership

At least 70% of households at CBC who can afford to rent but not to buy are likely to need affordable home ownership products, across a mix of types.

Intermediate Need - Preferences

Household preferences are an important factor when determining intermediate need, because some households in these income bands may be content to remain in the private rented sector. Therefore, intermediate affordable housing needs can be more fluid over time, in response to other factors that affect tenure preferences.

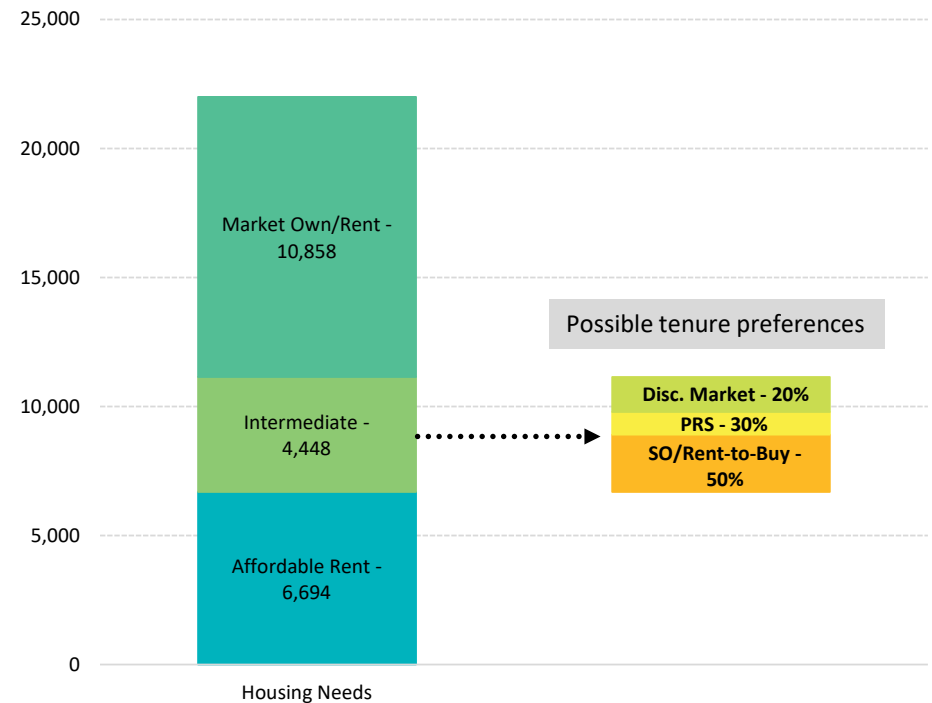
Our survey asked respondents to indicate whether particular tenures of housing would be attractive to them, if it were available and affordable to them. This included shared ownership and rent-to-buy as options, as well as private renting.

Of households with an income between £33,000 and £76,000 (i.e. broadly capturing all households that might fall into intermediate need), **50%** expressed a preference for either **shared ownership** or **rent-to-buy** housing, shown in Figure 27. This was broadly split evenly between these two tenures, suggesting there is significant potential need for rent-to-buy housing (renting below market rates to save a deposit) which is less common than shared ownership, despite similarities and potential overlap between the two (rent-to-buy can lead to shared ownership). Our survey showed that this was a particularly popular in the Education and Research Sector.

A further **30%** of households in this income group expressed a preference for private rented housing, indicating that the private rented sector currently meets a proportion of CBC workers current housing needs. This may be because of the nature of their current employment (e.g. expecting to move in the near future), it suits their current lifestage or simply due to preference. This could also represent potential need for Build-to-Rent, which we explore later in this section.

Of the remainder (**20%**), who indicated that none of the options listed would be attractive to them, we have assumed that they might represent demand for other forms of intermediate housing which were not listed in the survey, primarily discount market housing. This is on the basis that they did not indicate 'private renting' as a preferred tenure. The fluidity of potential tenure demands in this sector is reflected in our recommended 'Housing Ask' in Section 6.

Figure 27: Current tenure needs and preferences of intermediate households at CBC (Source: Lichfields)



Current Affordable Housing Needs

Currently 10,000 to 11,000 workers at CBC need some form of affordable housing, with the majority in need of affordable rented homes.

Summary

Combining the affordable rented need assessment with the intermediate needs assessment suggests that there is in the range of **10,000 to 11,000 current CBC workers need some form of affordable housing**, as shown in Table 16. This comprises all 6,700 workers who need affordable rented housing (30% of all CBC workers), plus a proportion of the 4,500 of workers falling into potential intermediate need. Our survey suggests that as a minimum, 70% of these households currently aspire to home ownership (as either shared ownership, rent-to-buy or discount market housing), however it would be prudent to ensure that sufficient choice exists for households whose preferences may change over time, and hence we have presented a range in which all households falling into potential intermediate need are included.

The affordable rented element represents 60-70% of current affordable housing need, reflecting the particularly poor affordability of smaller rental housing in Cambridge and the difficulty that single people (and other single earner households, such as lone parents) in being able to afford housing. The remainder – 30-40% – is for intermediate housing, to cater to households who might be able to afford renting in Greater Cambridge but who cannot afford to buy in the open market. In Lichfields’ experience, this is broadly reflective of the split of rented and intermediate housing assessed within local authority evidence, through SHMAs and other similar studies, and reflects the fact that average earnings across CBC are broadly in line with Greater Cambridge as a whole.

Within intermediate housing, the evidence supports a 40:40:20 split, reflecting the survey findings which show a particularly strong attractiveness of rent-to-buy amongst CBC workers.

For the purposes of housing mix, these are recommended as a range, reflecting the survey findings. This is to ensure any mix is not overly prescriptive, and there is scope to consider site-specific factors, viability, design, placemaking and other factors.

Table 16: Summary of current affordable housing need for CBC (Source: Lichfields. Figures rounded)

	Affordable Need			
CBC workers in need	10,000-11,000 (43-50% of total workers)			
	Affordable/ Social Rent	Intermediate		
Of which	6,700 (60-70%)	3,100-4,500 (30-40%)		
	~	Shared Own.	Rent-to-Buy	Disc. Market
Of which	~	40%	40%	20%
Size				
1-bed	60-65%		10-20%	
2-bed	10-20%		25-35%	
3-bed	10-20%		30-40%	
4-bed	5-10%		15-20%	

Students

The identified affordable housing need implicitly include the needs of students/trainees, who represented 3% of our survey sample. This equates to c.550 in total when scaled up to the total number of CBC workers. These workers are typically on lower incomes and in need of small, affordable accommodation. Whilst a small percentage live in employer provided accommodation (some accommodation is currently offered via Sanctuary) the majority lived in the private rented sector or with family. The provision of some more affordable student accommodation could therefore contribute to meeting CBC needs.

Future Needs

Affordable housing needs of CBC workers are expected to grow by around 4,000-5,000 by 2050.

Future CBC growth

CBC is expected to grow from 22,000 workers currently to 40,000 workers by 2050; the majority of these new workers will be in the CLS sector, which accounts for an additional 12,000 workers. Because there are notably different income profiles between each sector, as well as different household profiles, it is important that a future assessment of need takes into account the changing nature of workers at the campus.

To estimate future need, we have taken the household type and income profile, separately for each sector (from the survey) and applied this to future growth (12,000 CLS workers, 5,000 Health workers and 1,000 E&R workers). Once aggregated, this gives and overall household type and income profile to which we can apply affordability testing, using the same method as applied for current CBC workers.

Of the 18,000 new workers at CBC by 2050, an estimated 2,400 will need affordable rented housing – around 13% – as shown in Figure 28. This is because the CLS sector makes up the majority of future growth, and incomes in this sector are well above the CBC and Greater Cambridge average. A further c.2,500 workers would be able to rent but be unable to buy, representing the potential need for intermediate housing. At a minimum, based on 70% of these workers aspiring to some form of home ownership, the intermediate need would be 1,750, giving a total affordable housing need of around 4,000. This would be up to 5,000 if all workers falling into the ‘intermediate’ incomes wanted affordable home ownership products.

In total, the **affordable housing need associated with current and future CBC workers** therefore amounts to between **14,000 and 16,000 homes by 2050** (Figure 29).

The mix of these need (in terms of bedrooms) broadly follows the current needs, shown previously in Figure 27, albeit with a potential skew towards more smaller homes in the intermediate tenures. The ranges presented in Figure 28 are intentionally broad to also capture these future needs.

Figure 28: Current and future affordable housing need at CBC (Source: Lichfields. Figures rounded)

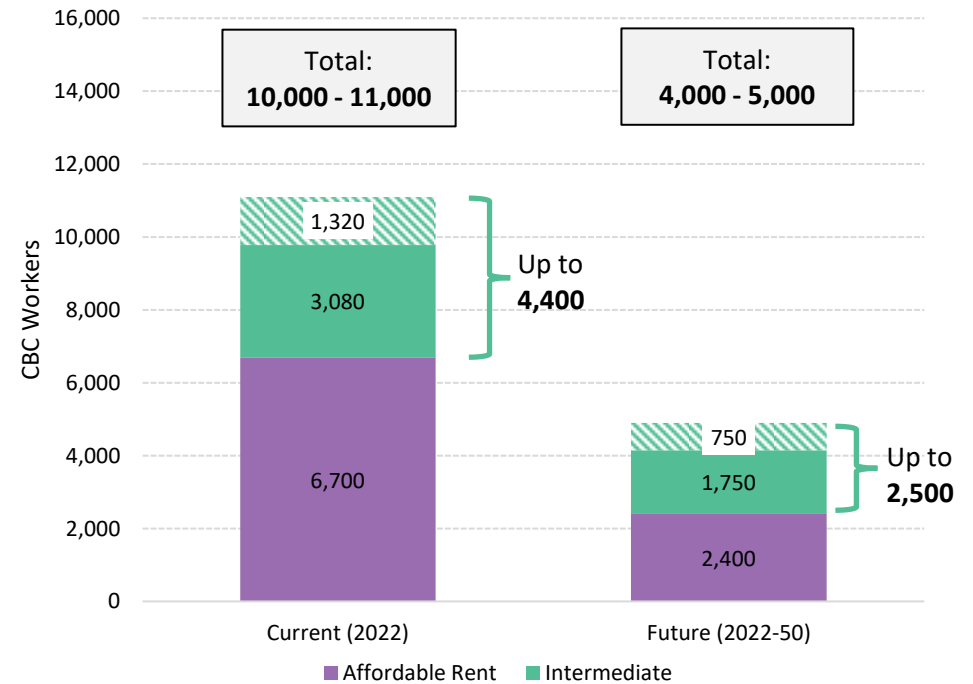


Figure 29: Total affordable housing need at CBC (Source: Lichfields. Figures rounded)



Other Types of Housing

Our survey showed that CBC workers had a diverse range of other potential housing needs and demands, including shared, rented and accessible housing.

Shared Accommodation

Our survey asked respondents about their attitudes towards shared accommodation.

Those who viewed this **‘very positively’** ranged from **2%** of E&R workers to **4%** of CLS, which could be because CLS workers were more likely to be single people or sharers compared with other sectors. When applied to the current number of workers at CBC, this suggests there could be a potential current need for 626 units of shared accommodation; when applied to future growth of the campus, there could be a need a further 623 units by 2050, or **c.1,200** in total.

Co-living (as opposed to large HMOs, cluster flat style accommodation or bedsits) is a relatively new and emerging form of shared accommodation in the UK and in Cambridge, and current attitudes might reflect the lack of knowledge and/or lack of high-quality schemes available. If this changed (such that those who currently perceive shared accommodation ‘moderately positively’ were to shift to viewing this ‘very positively’) there could be total demand – current and future – for a further 1,320 units, or up to **c.2,500** total*.

1,200

Estimated current and future need for **shared** accommodation (to 2050)

2,500

Potential **total** need for shared accommodation, if **demand grows**

**It should be noted that there is likely to be overlap between the need for co-living and BtR, particularly for single person households, including students.*

Build-to-Rent (BtR)

Our survey asked households whether private rented housing would be attractive to them if it were available and affordable. There was some variation amongst sectors, as shown earlier in Figure 23, with Health workers viewing this as slightly more attractive than E&R and CLS workers.

Our previous analysis shows that of those falling into the incomes eligible for intermediate housing (i.e. who can rent but cannot afford to buy in the market) 20% indicated that private rented housing was attractive to them; based on current and future CBC workers this could amount to a need for **1,600** units of BtR accommodation in the future.

Our survey also indicated that of higher earners – those with enough income to either buy or rent in the market – 15% found private renting an attractive tenure option. These households might benefit from greater choice of housing, including high quality purpose built rented housing, and could represent demand for a further 2,000 BtR units, or **3,600** in total*.

1,600

Estimated current and future need for **BtR** accommodation

3,600

Total potential need for BtR accommodation, including **higher earners**

Accessible Housing

3% of survey respondents indicated they needed **wheelchair accessible** housing. The survey suggested that those in need came from a range of sectors, incomes, tenures and housing types, i.e. wheelchair housing need was not limited to those who are currently in affordable housing. This is important because the current Cambridge and South Cambridgeshire Local Plans (2018) only require wheelchair housing on new **affordable** housing. The importance of wheelchair housing overall will also become increasingly important due to wider trends towards an ageing population, and the need to support people to live independently for as long as possible.

Based on current CBC workers, this suggests **c.700** workers need wheelchair accessible housing. When future growth is accounted for, the total need rises to **1,200** wheelchair units by 2050.

This suggests that to accommodate CBC worker needs, a minimum of **3% of homes** – across all housing **sizes, types** and **tenures** – should be wheelchair accessible.

1,200

Estimated current and future CBC workers in need of **wheelchair** accessible housing

3%

Minimum homes across **all tenures** required to be **wheelchair** accessible

6. CBC's 'Housing Ask'

CBC's 'Housing Ask'

To reflect the needs of CBC workers, a quantified 'basic ask' has been formulated by CBC for how future growth can deliver affordable homes to meet those needs.

Introduction

Our 'housing ask' is informed by our assessed housing need and the feedback from CBC employers and employees we have received through this housing study. CBC Ltd and its constituent members wish to see a housing market in Greater Cambridge which works for its employees. This means those workers on lower incomes critical for the successful functioning of the Campus (such as nurses, lab technicians, cleaners among many others), and in most need of affordable housing, can access the homes they need. It also means workers of all types and at all income levels have attractive and well-located housing options to help the Campus recruit and retain the workforce it needs to grow and thrive. To achieve this, our 'housing ask' is what CBC Ltd wishes to see delivered, including through the planning system.

In arriving at this housing ask, it is responding to CBC's objectives to:

1. Prioritise the needs of those on lower incomes, meeting those considerable needs for affordable housing – particularly social/affordable rent tenures – as a first slice of any housing delivery to address the current housing issues faced;
2. Stratify this ask, both in terms of who housing for, but also in terms of where and how housing is delivered to help meet the Campus' needs; and
3. Reflect that different organisations, bodies and authorities have different roles to play in responding to these needs.

In that context our different asks are of different groups including:

- An 'ask' of **policy makers** (e.g. Cambridge City Council, South Cambridgeshire Council and potentially the Cambridge Delivery Group in the future), with this Housing Study providing evidence for developing housing strategy and planning policy to support growth.
- An 'ask' of **planning decision takers** on how evidence can support their core policy requirements of development schemes, and how housing delivery might link to CBC's housing needs as justification for a scheme.
- An 'ask' of **developers** who may come forward with sites/plans for new housing development which are linked to, or partly predicated upon, the housing needs generated by the Campus; setting the starting point for how CBC may approach such proposals.

Responding to CBC's Housing Needs

Our 'Basic Ask' (see box below) reflects the current housing needs of the Campus. It is identified to reflect the minimum affordable housing provision that would be required as part of housing growth (e.g. new sites/schemes, new planning policies) in order to meet what we have assessed as the housing needs of the Campus.

It is made as a generalised ask, agnostic of how much housing growth might be planned, or where that housing might be; those matters of spatial strategy being for policy makers to decide cognisant of the overall wider housing needs of Greater Cambridge and that CBC's specific needs are one component of those needs. However, it provides a quantified request for housing provision which, where delivered, would address CBC's needs.

Our 'Basic Ask' based on headline housing needs

To reflect Cambridge Biomedical Campus' housing needs, new housing growth (e.g. sites) delivered to help meet our current and future workers needs should provide:

1. At least **30% of new homes as affordable tenures for rent** (Social or Affordable Rent); plus
2. At least **13% up to 20% of new homes as intermediate housing tenures** provided as a suitable mix of tenures such as First Homes, shared ownership or rent-to-buy tenures (i.e. 43-50% total affordable/sub-market provision);
3. A **mix of affordable homes** by size and type to reflect the needs of Campus workers (see Table 16)
4. An **allocations mechanism** for some housing to go towards local workers in hard to recruit to sectors, and/or other specified workers at the Campus (e.g. Local Lettings Plans).

A generalised ask of: **Policy Makers, Decision Takers and Developers**

Meeting the Housing Preferences of CBC Workers

Alongside the ‘basic ask’, CBC wishes to see new developments that embody a set of general principles that flow from workers’ housing needs and preferences.

Housing Principles

Our generalised ‘basic ask’ reflects the housing needs of CBC workers. Beyond those headline needs, the housing survey unveils a host of things that are important to how and where CBC workers live. These preferences are important to meeting such housing needs and aspirations. Addressing these factors through new housing delivery will help CBC to attract and retain the workforce required to maintain its status as it grows in a globally competitive environment.

1. Affordable and Social Rented Homes – 30%+

30% of CBC workers need affordable/social rented homes, with a similar proportion expressing a preference for this type of home rented from the Council or a Housing Association. CBC wish to see provision of affordable/social rent homes ‘protected’ in new development, with this key to meeting workers housing needs. Ensuring CBC workers can successfully access that housing is a key objective CBC will work with partners to achieve.

2. Intermediate Affordable Homes – 13% up to 20%

Up to 20% of CBC workers could benefit from intermediate affordable homes, whilst 13% prefer such accommodation (the remainder preferring to rent in the private rented sector). Provision of a mix of such tenures will help meet CBC worker needs.

3. Market Homes

Much like nationally, workers at CBC have strong aspirations to own their homes; though many feel it is out of reach. Around $\frac{3}{4}$ of current CBC worker homeowners value having a garden and parking, whilst 13% want more space than currently. Market homes that meet such aspirations remain an important part of the mix.

We have distilled these into seven principles for new housing development in Greater Cambridge, which will help ensure growth can meet the needs of Campus workers.

4. High Quality Accommodation

Much of CBC worker dissatisfaction with their current accommodation situation stems from quality issues. Well designed, built, managed and maintained homes, across all types and tenure of home, will help retain workers. CBC will support opportunities to effectively manage good quality housing stock for CBC workers.

5. Public Transport and Accessibility

88% of CBC workers say public transport to CBC is important to where they live. CBC wish to see new development and growth capitalise upon and enhance accessibility to the Campus, and reflect CBC’s needs in their housing provision.

6. Access to Amenities and Placemaking

Well-designed communities, with homes close to amenities such as shops, healthcare, schools and outdoor space are high on the agenda for CBC workers.

7. Diversity of Housing Options

A ‘one size fits all’ approach to housing CBC workers is not appropriate, and key to meeting the range of needs will be a diversity of housing options, from tenure, type, size and location. CBC will support options which meet a range of specific needs.

A generalised ask of: **Policy Makers, Decision Takers and Developers**

Housing tied to CBC Workers

Ensuring housing – across all tenures - is tied or prioritised to CBC workers will ensure the campus’s needs are met, now and in perpetuity.

Delivering housing for CBC Workers

Whilst provision of more housing across Greater Cambridgeshire, and of the types needed by CBC workers, will assist in providing opportunities for accessing suitable homes; in a constrained and competitive market the only way to ensure that housing genuinely meets the needs of CBC workers is to consider opportunities to tie or prioritise housing to CBC workers. Across all types and tenure of new homes (both affordable and market) there are potential mechanisms to achieve this, including the following, which CBC could explore with potential partners:

1. Direct delivery of housing for Campus workers on developments by CBC organisations or partner organisations. Examples of this at Eddington (by the University of Cambridge) and Hinxtton (by the Wellcome Trust) demonstrate how this might be achieved, with large scale developments specifically for certain sectors;
2. Agreement of Local Lettings Plans (or equivalent) with developers/housing providers for certain types of affordable housing provision, linked to the needs of CBC, which includes priority mechanisms for CBC workers or certain professions on Campus recognised as being subject to labour market shortfall.
3. For private/market tenure homes (e.g. co-living or build-to-rent housing) direct agreements with partners/providers of those types of accommodation to provide market priority to CBC workers.

CBC should particularly consider and pursue such options where the justification for the delivery of new housing development is intrinsically tied to the housing needs of the Campus (e.g. where an exceptional justification against policy is made to bring forward a development predicated, at least in part, on supporting the housing and growth needs of the Campus). In such circumstances, CBC will be justified in seeking a particular mix of housing and a mechanism for securing provision against the workers’ needs that are defined in this Housing Study.

Case Study: Central Middlesex Hospital ‘Key Worker’ Housing

In 2012, Housing Association Network Homes completed a development at Central Way (London Borough of Brent), known as ‘Luma Apartments’ for 145 affordable residential units (87 social rent, 58 shared ownership) providing ‘key worker’ housing aimed in the first instance at the employees of the adjacent Central Middlesex Hospital. The agreement of a lettings plan inserted priority for eligible key workers at the hospital (primarily expected to be nurses). In the event that insufficient demand for the units from key worker employees at Central Middlesex Hospital arose, the units were to be offered on a cascading scale to those in housing need in the wider Brent community.

This provides an example of where a specific lettings plan has helped deliver social housing tied to specific workers close to their place of employment.



Housing tied to CBC Workers

The Wellcome Trust at Hinxton provides a local example of how new housing can respond specifically to the needs of local employers.

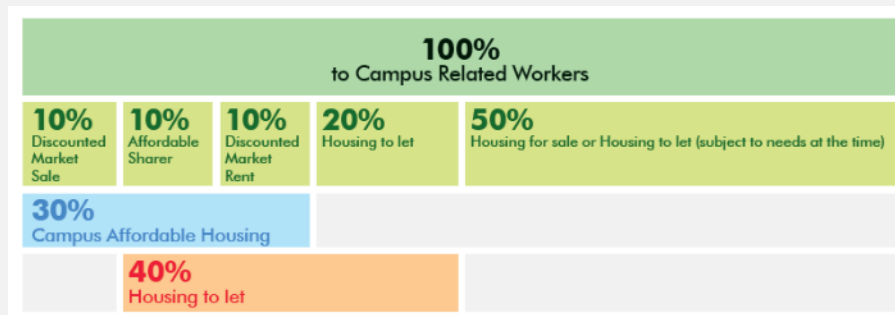
Case Study: Wellcome Trust Housing at Hinxton

The development at Hinxton by Wellcome Trust is a mixed-use development comprising employment use incorporating research and development workspace, with up to 1,500 residential dwellings. The residential element was proposed to provide a residential mix that was suitable for campus workers at all levels. All the 1,500 dwellings will be subject to restrictions to ensure occupation by campus linked workers.

The accompanying S106 agreement set out therefore that in order to meet this threshold, one campus-linked employee per household was required. Nursery provision was specifically given over to campus related workers which were defined within the S106 as any person who is employed by a new campus occupier including both permanent and part time staff, as well as both fixed term contracts and sub-contractors.

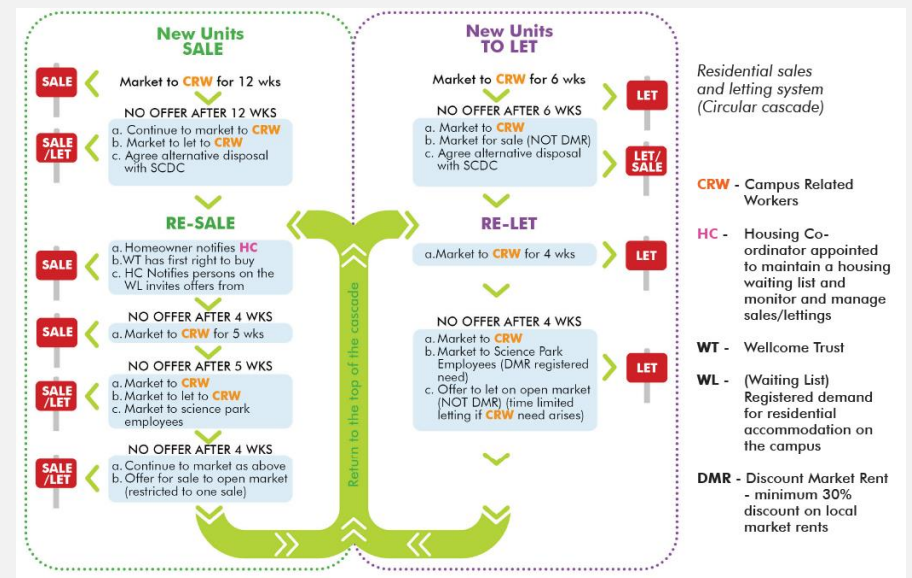
A campus related worker is *'any person who is employed by a Campus Occupier or a person employed to provide specific services on or to the campus'*.

Figure 30: Hinxton Allocation and Tenure Mix



The Wellcome Trust planned development at Hinxton provides an example of how Campus and worker-linked housing can be provided to meet the needs associated with a specific workplace. Provided wholly for Campus workers, with a mix of homes for sale and homes to rent, the below illustrates the mechanism by which new homes will be sold/let with priority to campus related workers, with cascades to other science park employees before being offered to the open market (with restrictions). Being delivered currently, its success may provide a further blueprint for science cluster related housing within Greater Cambridge.

Figure 31: Hinxton 'Circular Cascade' Sales and Lettings Plan System (Source: Wellcome Genome Campus Development Guide June 2021)



Specific Housing Challenges and Opportunities

Rented housing could play an important role in meeting needs of those preferring the flexibility of renting, such as students and international workers.

Build-to-Rent

Just over a third of CBC workers are currently renting privately, with around 26% of indicating they were happy to consider private renting going forward and the majority of workers indicating they would be happy to have other CBC workers as neighbours. Although many private renters aspire to move on, including towards home ownership, there remains a need and demand for private rented homes from CBC workers. The private rented sector will continue to play an important role in meeting the housing needs of workers, catering to those who prefer the flexibility offered by renting or simply prefer the lifestyle. This will be particularly important for CBC to attract workers who might be on flexible or temporary contracts (and therefore be unsuited to the commitment of home ownership) as well as international workers.

At present, private rented housing is generally provided within the wider housing stock, owned and managed by individual landlords or small to medium sized businesses. Across the UK in recent years, there has been an emergence of housing which has been purpose-built to be rented out, developed by institutional investors and professionally managed. They are generally higher quality than existing homes in the sector and offer long term tenancies, creating housing security for their tenants. BtR developments have typically been high-density flatted schemes in urban locations, but are increasingly found in suburban and rural areas, offering a range of housing types and sizes, along with gardens and open spaces. BtR developments also deliver affordable housing, in the form of 'Affordable Private Rent', which should be offered at [at least] 20% below market rents. Unlikely normal affordable housing, the landlord does not need to be a Registered Provider and can be the BtR operator.

BtR housing could provide an opportunity to meet the needs of CBC workers – particularly those in need of more flexible housing (than home ownership) such as students and trainees - whilst addressing many of the perceived drawbacks of the private rented sector such as poor management, lower housing quality and low security of tenure. Our housing needs assessment (Section 5) estimated that future need for BtR housing for CBC workers could be in the range of **1,600-3,600** units.

Case Study: North West Cambridge (Eddington)

The residential element of development proposals at Eddington consisted of 3,000 dwellings, of which 1,500 were discounted rent homes proposed for University and College key workers. However, as the development progressed, demand for the units exceeded initial estimates and a deed of variation was submitted in 2020.

This variation was a resultant of the increase in need for key worker housing amongst university staff, such that the quantum of key worker housing required to meet its needs exceeded the number of units proposed. As such, criteria for the assessment of key worker housing applicants to determine which staff were eligible and should be prioritized was established through the creation of 'key worker housing rental principles' set out in the deed of variation. This provides a model example of how the allocation of worker housing can be designated. The established principles included:

1. Determining housing applicant eligibility
2. Assessed whether the applicant was recruited to a 'hard to fill' post
3. If not in hard to fill post category apply geographic criteria



Image Credit: University of Cambridge

Specific Housing Challenges and Opportunities

CBC has a range of specific challenges, including workers with wheelchair needs, needs of international workers and shared accommodation.

Specific Housing Needs

As well as the generalised housing needs associated with CBC, there are a range of specific housing challenges and opportunities that new homes can address to help meet specific needs of CBC workers. These vary widely, but some of those important sub-sectors of housing need are explored as follows.

Wheelchair Accessible Housing

Around 3% of respondents to the CBC workforce survey indicated they would need wheelchair access if moving to a new home. Previous assessments¹ have indicated around 6.5% of households in Greater Cambridge need a wheelchair accessible home (including older persons, beyond working age), although the Councils currently only require this on affordable housing. Although a small housing need, it is an important one for some CBC workers across all tenures. Local Planning Authorities have the option, through evidenced planning policies, to implement the optional technical standard M4(3) wheelchair user dwellings of Building Regulations. This would see a proportion of homes needing to be provided as wheelchair accessible. In new developments which might provide homes for CBC workers, at least 3% of those homes overall would need to be delivered to this wheelchair accessible standard to meet the needs of its workers.

Needs of International Workers

Around 29% of workers at CBC are international, with such workers more prevalent in the Campus' expanding Commercial Life Sciences sector. The Campus competes for the best talent from across the world, and housing is key consideration in how successful the Campus can be in recruiting and retaining such international staff. We heard anecdotally, both through our survey and workshops, some of the difficulties that international workers coming to the UK and Cambridge faced in accessing suitable housing, from being not eligible for Council support to difficulties with estate agent checks or mortgage accessibility.

Although not a homogenous group, with no single housing preference (and varying

career and life stages), the needs of new overseas workers, or visiting staff to CBC, might be suitably served by housing options specifically available to Campus linked workers, providing a 'landing pad' for such workers and their families before they make subsequent housing moves. This factor was one consideration in the approach taken to the planned Wellcome Trust housing at Hinxton (see following Case Study).

Co-Living / Shared Accommodation Needs

Around 3% of CBC workers were 'very positive' towards the idea of living in shared accommodation with other CBC workers as an affordable way of meeting their housing needs. A further 6% were 'moderately positive' to the concept, with one of the main reservations seemingly being around perceptions of quality. Sanctuary Housing, who operate shared accommodation on Campus for Addenbrooke's, report that accommodation is currently at full capacity with extensive waiting lists. There is a clear demand for this type of accommodation.

Across the Campus workforce, we estimate that there is potential minimum demand for around 1,200 units of shared accommodation when accounting for potential future Campus growth (and based only on those 'very positive' towards such housing). This could increase further, with the right quality and type of accommodation which is attractive to a wider range of workers. To that end, 'co-living' accommodation – purpose built and managed rental housing typically comprising studio bedrooms and high-quality communal amenity spaces, usually targeted at younger professionals with bills inclusive – forms one potential type of housing which would successfully meet the housing needs of a section of CBC workers, including students. This would likely need to be close and/or highly accessible to the Campus and could complement the existing provision by Sanctuary.

¹ Housing Needs of Specific Groups Cambridgeshire and West Suffolk, published 2021, available <https://cambridgeshireinsight.org.uk/wp-content/uploads/2021/10/CWS-Housing-Needs-of-Specific-Groups-Oct21.pdf>

Specific Housing Challenges and Opportunities

As well as specific housing needs, there is the opportunity for new development in Greater Cambridge to respond to how and where workers want to live.

Student Accommodation

The Campus is home to students on placements and apprenticeships. Our survey captured 74 such students (3% of respondents) based at the Campus. Whilst a small segment, the age, circumstances and living arrangements of such students are require materially different housing approaches. The majority rent privately or live with family, although a small number reside in student accommodation. On Campus, Sanctuary's Harston House provides some student accommodation for Anglia Ruskin University students studying nursing, midwifery or operating department practice as well as other CUH trust student placements. Although demand for student accommodation from the CBC student workforce appears small in overall terms, there may be opportunities to provide for students at CBC in either wider student accommodation schemes, or as part of any Co-Living type provision.

Market Housing

Many employees at CBC, particularly in the Commercial Life Sciences sector, have incomes that mean that they are able to afford to buy their own home. Generally, their needs will be met within the wider housing market, and meeting their aspirations will mean providing a mix of homes for sale attractive to such workers, from flats to executive homes, including key desired features such as a garden/outdoor space, storage and parking.

Placemaking and Local Infrastructure

Alongside specific needs of different workers, there are clear opportunities to respond to how and where workers want to live. In this context, placemaking is an integral component of meeting the housing needs of CBC. New communities and strategic sites should be accompanied by appropriate community facilities commensurate to their size – schools, nurseries, healthcare, shops, community space – in order to create neighbourhoods where people aspire to live.

There are recognised challenges in the capacity of current infrastructure to accommodate growth, including in respect of school and nursery places and local healthcare services (doctors and dentists). Access to such facilities as an integral part of new developments and neighbourhoods is also key, with such challenges recognised in Government's 'Case for Cambridge' which sets out an objective for "sustainable infrastructure-led growth". Such an approach to housing and placemaking is supported, and such an offer from strategic sites or new communities will help keep CBC competitive on a global scale.



Image Credit: Sanctuary Housing

Recommendations for Future Planning

CBC endeavours to see the needs of CBC workers recognised and addressed through the planning system.

Delivering Housing for CBC's Needs

This housing study looks at the overall housing needs associated with workers at the Cambridge Biomedical Campus. It is intended as an evidence base to inform and influence the nature of housing provision across the Greater Cambridge area where CBC's workforce predominantly resides. It is only one part of the jigsaw of housing needs that exist across the Greater Cambridge area, but the housing needs that the Campus currently generates, and that its growth in the future will further generate, are needs that CBC wish to see planned for.

The provision of suitable housing is critical to the ability of the Campus organisations to recruit and retain the workforce they need. A number of professions on the Campus are formally recognised by Government as being in labour shortfalls (via Government's shortage occupations list/immigration salary list for skilled worker visas). CBC consider housing is an effective tool, as part of a wider toolkit, to alleviate these critical shortfalls.

Therefore, the range of housing needs identified (summarised in the box right) are those CBC wishes to be addressed and reflected upon through the planning system, either by policy makers (for example through the policies in the Greater Cambridge Local Plan, or future development and housing strategies for the area) or through decisions on proposed developments, both by the decision takers and the developers proposing those schemes.

There are a range of levers available for meeting CBC's housing needs, but as part of these CBC wishes to see the prioritisation of its affordable housing needs. Where possible, the maximum affordable housing delivery should be captured as a first slice of development, such that affordable homes are not foregone in preference for meeting other housing needs. It is those CBC workers on the lowest incomes which are most in need of successful housing outcomes.

Summary of our specific housing needs

To reflect Cambridge Biomedical Campus' specific housing needs, new housing which provides for the following should be positively encouraged through planning:

1. A current and future need for **14,000-16,000** affordable homes, to be delivered via our 'basic ask' with a minimum of 30% affordable/social rent as well as a range of intermediate tenures to meet the 43%+ of CBC worker households in need of affordable housing.
2. A need and demand for **1,600-3,600 build to rent** homes available to CBC workers with flexible/incremental tenancy lengths.
3. A demand for **1,200 co-living** style units exist, which, where well designed and managed, could provide popular accommodation for some CBC workers, including young professionals and students.
4. At least **3%** of new homes should be **wheelchair accessible** (building regulations Part M4(3) optional standard) to meet the needs of CBC families.
5. Market housing comprising a genuine mix of flats and houses, of different sizes and at different points of the housing ladder, to provide choice for CBC workers who aspire to own.

An ask of: **Policy Makers, Decision Takers and Developers**

Our Specific Ask of Strategic Sites

Large sites, more accessible to CBC, will have a greater role in meeting CBC’s housing needs and where predicated on those needs, should meet CBC’s ‘ask’.

Supporting Strategic Sites

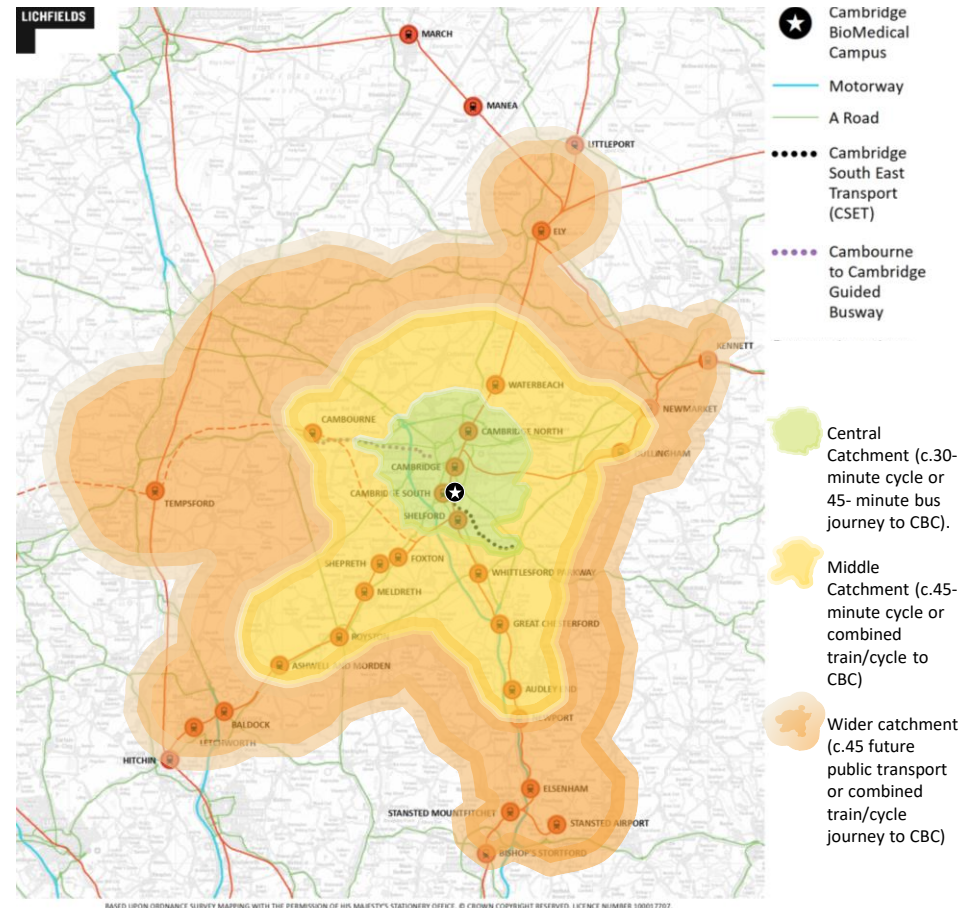
Many strategic sites – loosely defined as those able to accommodate 250 homes or more – may come forward to help meet the housing needs of Greater Cambridge, whilst the range of sites potentially available may also inform the shape of future growth. Government’s ‘Case for Cambridge’ (March 2024) clearly outlines the growth potential of the area. These strategic sites (as mapped in Figure 32 earlier in this report), where they come forward via the planning system, could have a potentially significant role to play in meeting the housing needs of CBC.

In that context, this Housing Study has developed a ‘specific ask of strategic sites’ for CBC, illustrated on the following page. Although the housing needs of CBC and the generalised ask that flows from that is applicable to all sites, this ask of strategic sites will act as a starting platform for considering an appropriate development mix on such sites specifically where any sites or developers seek to partner, or otherwise draw support from CBC, in order to make the case for their development. In short: where developments comes forward justified by, or pursuant to, the housing needs of CBC workers, the quid pro quo should be that developments meet the specific housing needs and preferences that exist from CBC workers.

To generate this ‘ask’ we have identified housing catchments for the Campus, based on transport accessibility, and split those areas into broad ‘central’, ‘middle’ and ‘wider’ catchment areas. The principle flowing from this is that the closer and more well related to CBC any strategic site is, the more it can – and should – do to help meet the specific housing needs of CBC workers. Our ask is graded by these broad catchments (albeit there may be a case for individual sites to be considered as having a greater or lesser relationship based on their unique characteristics).

This ‘ask’ is primarily intended for developers, setting out the circumstances in which CBC will consider there is benefit specifically to the Campus of proposed housing delivery, but it may also support decision takers in enforcing their core policy asks of developers and enhancing their ability to weigh up material factors in making decisions on specific schemes (including where they are linked to Campus housing needs).

Figure 32: Cambridge Biomedical Campus Housing Catchment Areas



Our Specific Ask of Strategic Sites

Our ‘ask’ of sites falling into each category set expectations of what CBC wishes to see delivered by such developments meeting CBC’s housing needs.

Sites in CBC’s central catchment should...

1. Meet our ‘basic ask’ for affordable housing, with mechanisms to allocate at least an element of homes to CBC workers.
2. Where Green Belt, or land removed from the Green Belt for development, provide enhanced levels of affordable housing (i.e. in excess of Local Policy affordable housing requirements) if the circumstances relied upon relate to Cambridge Biomedical Campus’ needs.
3. Provide dedicated housing to meet (and be tied-to) one or more of CBC’s specific housing needs, as follows:
 - i. Affordable/social rented and intermediate homes as per our ‘basic ask’.
 - ii. Co-living (shared) accommodation that is high quality and well managed, suitable for young professionals and/or students.
 - iii. Build to Rent homes with flexible/incremental tenancy lengths.
 - iv. Market housing for sale, with a priority mechanism for CBC workers.
4. Reflect our placemaking asks and the housing preferences of CBC workers.
5. Provide transport enhancements that support accessibility to CBC via active travel (walking, cycling and wheeling) and/or public transport.
6. Ensure all appropriate planning obligations (e.g. via Section 106 or CIL) are met in order to address direct impacts of new development on community services, including primary and acute healthcare provision.

An ask of: **Developers and Decision Takers**

Sites in CBC’s middle catchment should...

1. Reflect our ‘basic ask’ for affordable housing, to provide a mix of homes suited to meeting the needs of CBC workers.
2. Consider provision of housing that can meet one or more CBC’s specific housing needs such as build-to-rent, or the needs of biomedical sector employees, such as local worker housing.
3. Reflect our placemaking asks and the housing preferences of CBC workers.
4. Provide transport enhancements that support accessibility to CBC via active travel (walking, cycling and wheeling) and/or public transport.

An ask of: **Developers and Decision Takers**

Sites in CBC’s wider catchment and beyond should...

1. Consider how the homes provided could help meet the needs of CBC employers or biomedical sector employees who may wish to live there.
2. Reflect our placemaking asks and the housing preferences of CBC workers.
3. Provide transport enhancements that support accessibility to CBC via public transport, such as routes to local public transport nodes.

An ask of: **Developers and Decision Takers**

Summary and Conclusions

This study sets out the housing needs associated with workers at Cambridge Biomedical Campus, developing a housing ask of future housing growth.

Housing Needs of CBC

This housing study sets out the housing needs associated with the 22,000 workers at Cambridge Biomedical Campus, and how those needs will change with the envisaged growth of the Campus to 40,000 people. Cambridge faces significant housing challenges, with high housing costs and affordability problems, with those challenges extending to those who work at CBC.

A survey of more than 2,700 employees at the Campus (12.5% of the workforce) shows highly varied housing needs, but with cost, location and transport all issues CBC workers have with their current accommodation.

This study concludes that the current and future housing needs of CBC, as it delivers planned growth in health, education and research, and commercial life sciences, are:

Table 17: Summary of Study Housing Needs (Source: Lichfields. Figures rounded)

Type of Need	Current	Current + Future
Affordable Need	10,000-11,000	14,000-16,000
of which: Affordable/Social Rent	6,700	9,000
of which: Intermediate	3,100-4,500	5,000-7,000
	40:40:20 Shared Ownership: Rent-to-Buy: Discount Market	
Shared Accommodation	600	1,200-2,500
Build to Rent	~	1,600-3,600
Accessible Housing	700	1,200

These needs are gross, and as homes of these types are provided for CBC workers, they may free-up their existing accommodation for others. However, they are representative of the split of needs that exist and inform our housing 'ask'.

Housing 'Ask'

The purpose of the housing needs assessment is to inform how CBC can engage with and influence the type of housing growth that occurs in Cambridge. This will help ensure CBC workers' housing needs are being met whilst also helping CBC to ensure housing does not act as an ongoing and significant barrier to the ability to recruit and retain workers at the Campus, both for existing organisations or new ones as they locate to the Campus.

In this context, CBC's 'ask' is of various actors within the housing sector and who will determine the types of homes delivered in Greater Cambridge, including policy makers, decision takers and developers. It sets the evidence for CBC's engagement with matters of housing provision, including through the planning system. CBC is only one driver – albeit a significant one – of local housing needs. Therefore, CBC recognise this evidence will sit alongside other evidence and considerations. However, the 'ask' is formulated to set out what CBC wishes to see delivered to meet its worker's housing needs. The ask is stratified, by purpose, geography and also by housing need, but comprises the following:

1. A generalised 'basic ask' based on headline needs, including for 30% affordable tenures for rent and 13%-20% intermediate housing tenures. An allocations mechanism will ensure housing is available to specified workers at the Campus.
2. A generalised set of housing principles for how CBC wishes new development and growth to respond to the needs and preferences of CBC workers, including around accessibility, placemaking and diversity of housing options.
3. A specific 'ask' of strategic sites (250+ homes), which seeks for sites closer to CBC to provide specifically for CBC's identified housing needs where that is part of the rationale for a site being promoted or coming forward.

Overarching all of this, is CBC's wish to see the housing needs of its workers met, particularly at the lowest incomes, where needs are most acute and where affordable housing delivery should be protected as a first slice of development proposals.

**Appendix 1:
Survey and
Results**

Appendix 1: Survey and Results

Survey Questionnaire

The purpose of the survey questionnaire was to obtain further information about the views and aspirations of employees in relation to housing, employment, and transport circumstances around CBC. The results provide us with cross-tabulated variables to allow for analysis of housing aspirations based on characteristics such as age and tenure to understand more about employees' preferences for how and where they live, and what factors are important to them in those decisions.

The survey was conducted across December 2023 to February 2024. It was conducted online and circulated/communicated internally by each CBC organisation, save for Cambridge University Hospitals, to their workforce at the Campus (e.g. via all staff mailing lists and/or intranets). CUH provided us with the results of a similar survey already undertaken by themselves, with results in an entirely comparable format. The survey combined reached c.95% of the CBC workforce.

This appendix contains the questions which were asked in the survey, and the raw data containing the survey results. During the survey itself, respondents had to tick the relevant response(s) which applied.

Appendix 1: Survey and Results

Results by Question

Q1. Which organisation are you employed by?

Sector	No.	%
HEA	1,973	71%
E&R	385	14%
CLS	403	15%
Total	2,761	100%

Q2. Which option best describes your current employment status? (tick one)

Sector	Permanent contract	Fixed term contract	Trainee / student – non medical	Trainee / student – medical	Apprentice	Agency worker / contractor	Honorary Contract
HEA	1,788	135	5	25	16	2	2
E&R	176	187	14	2	2	2	1
CLS	376	15	0	0	7	4	0
Total	2,340	337	19	27	25	8	3

Q3. How many hours a week do you work? (tick one)

Sector	Full time (37.5 hours or more)	Part time (16- 37 hours)	Part time (less than 16 hours per week)
HEA	1,605	350	18
E&R	337	44	3
CLS	383	18	1
Total	2,325	412	22

Appendix 1: Survey and Results

Results by Question

Q4. How long have you worked at Cambridge Biomedical Campus? (tick one)

Sector	Less than 12 months	1-2 years	2-3 years	3-5 years	5-10 years	10+ years
HEA	277	290	182	333	345	546
E&R	67	46	41	48	94	89
CLS	198	49	40	97	16	3
Total	542	385	263	478	455	638

Q5. Which of the following best describes your staff group (tick one)

Sector	Nursing and Midwifery	Admin & Clerical	Additional Clinical Services	Medical and Dental	Healthcare Scientists	Allied Health Professionals	Estates and Ancillary	Additional Professional, Scientific and Technical	Other
HEA	793	483	21	119	129	249	70	64	45
E&R	7	84	1	17	40	0	3	202	31
CLS	0	32	0	2	62	0	2	262	43
Total	800	599	22	138	231	249	75	528	119

Q6. How old are you? (tick one)

Sector	16-20	21-25	26-30	31-35	36-40	41-45	46-50	51-55	56-60	61-65	66+
HEA	26	191	428	322	254	206	193	164	119	57	13
E&R	1	30	53	70	61	46	45	27	32	14	5
CLS	3	36	82	108	53	50	34	19	13	4	1
Total	30	257	563	500	368	302	272	210	164	75	19

Appendix 1: Survey and Results

Results by Question

Q7. What is your nationality? (tick one)

Sector	UK	EU	Other International (excluding EU):
HEA	1,454	241	278
E&R	246	82	57
CLS	264	105	34
Total	1,964	428	369

Q8. What is your current gross annual salary (before tax and deductions and including any benefits and allowances)? (tick one)

Sector	Less than £5,000	£5,000-£9,999	£10,000-£14,999	£15,000-£19,999	£20,000-£24,999	£25,000-£29,999	£30,000-£34,999	£35,000-£39,999	£40,000-£44,999	£45,000-£49,999	£50,000-£54,999	£55,000-£59,999	£60,000-£64,999	£65,000-£69,999	£70,000-£74,999	£75,000-£79,999	£80,000-£84,999	£85,000-£89,999	£90,000-£94,999	£95,000-£99,999	Over £100,000
HEA	8	15	55	271	469	241	337	202	129	54	51	27	19	9	18	11	9	5	14	7	22
E&R	1	1	4	6	27	43	71	63	59	27	15	21	12	9	1	0	5	1	0	2	15
CLS	0	0	1	0	13	27	32	37	37	49	41	19	22	21	20	9	17	11	6	9	28
Total	9	16	60	277	509	311	440	302	225	130	107	67	53	39	39	20	31	17	20	18	65

Appendix 1: Survey and Results

Results by Question

Q9. How would you describe your household? (tick one)

Sector	Single person	Single parent with children who live at home	Single parent with children who don't live at home	Couple with no children	Couple with children who live at home	Couple with children who don't live at home	Sharing with others	Other
HEA	307	101	18	432	614	112	314	75
E&R	91	14	5	94	113	25	32	11
CLS	77	3	2	137	131	6	39	8
Total	475	118	25	663	858	143	385	94

Q10. If you have children living at home, how many live at home?

Sector	1	2	3	4
HEA	300	297	82	25
E&R	44	72	12	1
CLS	68	59	10	1
Total	412	428	104	27

Q11. What age groups do your children that live at home fall into? (Tick all that apply)

Sector	Age 0-4	Age 5-11	Age 12-18	Adult
HEA	266	315	272	198
E&R	41	56	48	30
CLS	75	143	97	90
Total	382	514	417	318

Appendix 1: Survey and Results

Results by Question

Q12. What is your current average commute time to Cambridge Biomedical Campus? (tick one)

Sector	0-20 minutes	21-30 minutes	31 – 40 minutes	41 – 40 minutes	51-60 minutes	60 minutes +
HEA	531	424	295	237	214	272
E&R	90	78	45	46	65	61
CLS	63	81	62	34	62	101
Total	684	583	402	317	341	434

Q13. How do you get to work? (Tick all that apply)

Sector	Car	Car share	Walk	Cycle	Bus	Guided bus	Train	Moped/ motorbike	Taxi	Other (please specify):
HEA	1,080	115	509	668	506	9	105	0	51	21
E&R	161	16	68	180	87	27	25	4	2	1
CLS	221	31	96	156	72	54	40	5	6	7
Total	1,462	162	673	1,004	665	90	170	9	59	29

Q14. If you use a car, where do you park? (Tick all that apply)

Sector	On site	Park and ride	Other (please specify):
HEA	588	420	202
E&R	147	33	14
CLS	182	120	26
Total	917	573	242

Appendix 1: Survey and Results

Results by Question

Q15. How satisfied are you with your commute? (tick one)

Sector	Very satisfied	Moderately satisfied	Neutral	Moderately dissatisfied	Very dissatisfied
HEA	337	438	492	470	236
E&R	81	90	46	107	61
CLS	45	82	46	134	95
Total	463	610	584	711	392

Q16. If you are dissatisfied, why are you dissatisfied? (Tick all that apply)

Sector	Too long	Too expensive	Too busy	Lack of parking	There isn't any public transport where I live	Public transport is unreliable	Public transport is too complex (too many changes required/multiple providers)	There aren't enough buses/trains per hour	The public transport available does not fit my shift pattern
HEA	466	403	350	243	120	365	190	290	228
E&R	148	81	138	21	32	154	79	91	35
CLS	177	78	168	180	39	192	96	135	27
Total	791	562	656	444	191	711	365	516	290

Appendix 1: Survey and Results

Results by Question

Q17. What is your current housing situation? (tick one)

Sector	On-site staff accommodation (either Sanctuary or other)	Renting from a Housing Association (not on site)	Renting from a Council	Renting privately (from private landlord or letting agency)	Home owner, paying mortgage	Home owner, no mortgage	Home owner, Shared Ownership	Living with family	Other
HEA	78	76	59	676	722	140	53	144	25
E&R	5	18	5	133	135	52	7	17	13
CLS	0	6	1	157	174	31	9	21	4
Total	83	100	65	966	1,031	223	69	182	42

Q18. What postcode do you currently live in (first set of digits only e.g CB12, CB2)

Results not tabulated. See workforce analysis at Section 3 for analysis of where workers live.

Q19. How many bedrooms do you have? (tick one)

Sector	Room in a shared house	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	More than 4
HEA	234	186	473	650	339	91
E&R	39	55	101	110	63	16
CLS	40	55	93	129	66	19
Total	313	296	667	889	468	126

Appendix 1: Survey and Results

Results by Question

Q20. Are you the main earner in your household? (tick one)

Sector	Yes, main earner	No, earn about the same amount	No, earn less	Don't know
HEA	827	469	539	138
E&R	189	86	86	22
CLS	212	96	62	30
Total	1,228	651	687	190

Q21. What bracket does your household income fall into? (tick one)

Sector	Less than £20,000	£20,000 - £39,999	£40,000 - £59,999	£60,000 - £79,999	£80,000 - £99,999	£100,000 - £119,999	£120,000 - £139,999	£140,000 - £159,999	£160,000 - £179,999	£180,000 - £199,999	Over £200,000	Don't know
HEA	106	498	446	317	163	71	40	21	17	9	27	258
E&R	2	64	83	70	52	28	16	13	2	4	8	39
CLS	2	28	49	64	60	57	34	21	12	4	16	51
Total	110	590	578	451	275	156	90	55	31	17	51	348

Appendix 1: Survey and Results

Results by Question

Q22. How would you describe your household's ability to meet housing costs? (tick one)

Sector	Very comfortable	Moderately comfortable	Neutral	Moderately stretched	Very stretched
HEA	172	497	503	565	236
E&R	52	108	89	99	35
CLS	53	140	93	88	28
Total	277	745	685	752	299

Q23. How satisfied are you with your current accommodation? (tick one)

Sector	Very satisfied	Fairly satisfied	Neutral	Fairly dissatisfied	Very dissatisfied
HEA	493	509	558	323	90
E&R	86	136	64	78	21
CLS	97	138	67	80	21
Total	676	783	689	481	132

Q24. If you are dissatisfied with your accommodation, which of the following reasons apply? (Tick one and list others below)

Sector	Too expensive	Too small	Poorly maintained	Poor commute to work	Distance from amenities	Lack of public transport connections	Sharing with others	Concerns about safety/security in the home	Concerns about safety/security travelling to/from home	Concern about how long can remain in property	Other (please specify):
HEA	407	8	4	1	2	2	0	0	1	3	72
E&R	49	36	12	48	8	10	20	1	1	8	0
CLS	68	48	8	50	6	12	16	1	1	12	1
Total	524	92	24	99	16	24	36	2	3	23	73

Appendix 1: Survey and Results

Results by Question

Q25. Which of the following options is most suited to your needs? (tick one)

Sector	Flat	House
HEA	391	1,582
E&R	117	267
CLS	91	312
Total	599	2,161

Q26. What sort of area would you like to live in? (tick one)

Sector	Urban area	Suburban area	Rural area	Other
HEA	540	473	957	3
E&R	114	190	69	12
CLS	115	190	87	11
Total	769	853	1,113	26

Q27. How important is public transport to CBC/the hospital to your choice of where to live? (tick one)

Sector	Very important	Moderately important	Not at all important
HEA	1,103	632	238
E&R	207	133	45
CLS	181	160	60
Total	1,491	925	343

Appendix 1: Survey and Results

Results by Question

Q28. How important is public transport to Cambridge city centre to your choice of where to live? (tick one)

Sector	Very important	Moderately important	Not at all important
HEA	1,006	626	341
E&R	196	133	55
CLS	189	150	61
Total	1,391	909	457

Q29. What additional features would you require if you were to move to a different home? (please tick all that apply)

Sector	Garden	Outdoor storage	Parking	Wheelchair access	Other (please specify):
HEA	1,547	960	1,486	69	147
E&R	255	148	235	7	0
CLS	298	178	262	3	0
Total	2,100	1,286	1,983	79	147

Q30. What amenities would you require in the local area to where you live? (please tick all that apply)

Sector	Preschool / childcare	Primary School	Secondary School	Out of school facilities / childcare for children of school age	Health Care facilities	Local shop / food store	Play park / outdoor space	Gym / exercise facilities	Other (please specify):
HEA	472	607	522	413	1,383	1,820	1,067	1,020	142
E&R	57	92	91	66	229	347	183	184	0
CLS	128	142	102	89	252	363	200	247	0
Total	657	841	715	568	1,864	2,530	1,450	1,451	142

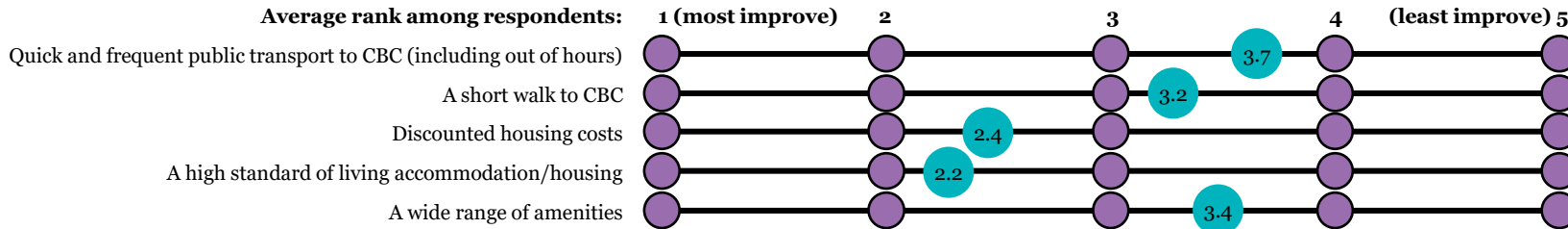
Appendix 1: Survey and Results

Results by Question

Q31. What is your attitude to living in the same accommodation as other Cambridge Biomedical Campus workers (where you would have shared kitchen facilities)?

Sector	Very positive	Moderately positive	Neutral	Moderately negative	Very negative
HEA	60	130	499	407	876
E&R	7	26	69	74	200
CLS	15	20	64	65	234
Total	82	176	632	546	1,310

Q32. If your view on living in the same accommodation with other workers was moderately negative or very negative, would these factors improve your view? (Rank all with 1 being the most significant)



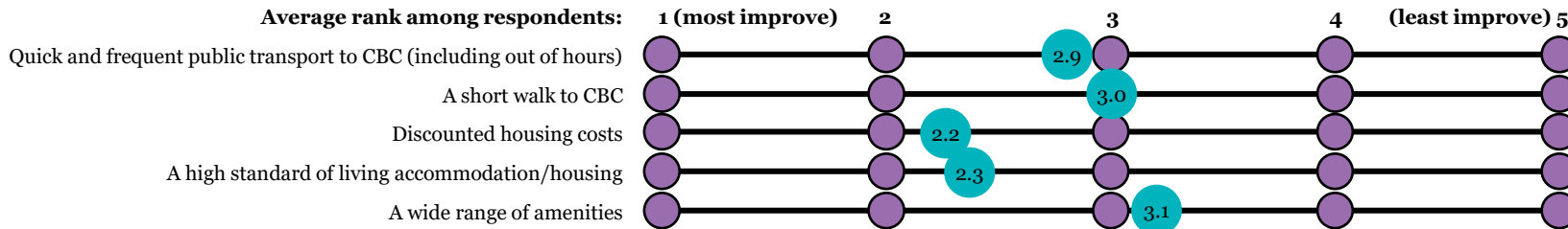
Appendix 1: Survey and Results

Results by Question

Q33. What is your attitude to your neighbours and surrounding households being primarily Cambridge Biomedical Campus workers?

Sector	Very positive	Moderately positive	Neutral	Moderately negative	Very negative
HEA	385	513	931	89	55
E&R	116	102	141	16	4
CLS	99	93	185	12	8
Total	600	708	1,257	117	67

Q34. If your view on your neighbours and surrounding households being primarily Cambridge Biomedical Campus workers was negative or moderately negative, would these factors improve your view? (Rank all that apply with 1 being the most significant)



Appendix 1: Survey and Results

Results by Question

Q35. Which of the following options would you consider if they were affordable/ available to you? (Please tick all that apply)

Sector	Shared ownership	Rent to buy (rent at a subsidised rate with a view to buying at a later stage)	Rent through a Council / Housing Association (typically at least 20% below the market rate)	Rent through a private landlord	None of the above
HEA	548	561	550	540	552
E&R	99	159	137	100	116
CLS	75	143	97	90	158
Total	722	863	784	730	826

Q36. Are you registered on the Council’s housing waiting list (Home-link) for Council / Housing Association housing?

Sector	Yes	No
HEA	88	1,884
E&R	7	369
CLS	7	387
Total	102	2,640

Q37. Is there any other information you would like to share relevant to this survey?

Results not tabulated. Range of individual circumstances and housing views shared, which have been considered in producing this Housing Study.

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