

Housing Needs of Specific Groups – Greater Cambridge Addendum

Greater Cambridge Shared Planning

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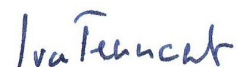
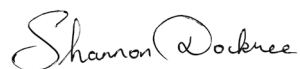
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Limitations

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1. Executive Summary

- 1.1 Greater Cambridge Shared Planning (GCSP) has recently commissioned two pieces of work from GL Hearn. Firstly, the Greater Cambridge Housing and Employment Relationships Report (HERR) and, secondly, the Cambridgeshire and West Suffolk Housing Needs of Specific Groups study (HNSG).
- 1.2 This report, named the Greater Cambridge Addendum (GCA) has been prepared by GL Hearn and Justin Gardner Consulting. It considers the impact on the findings of the HNSG for Cambridge and South Cambridgeshire in respect of the demographic change associated with four scenarios set out in the HERR. Also, for ease of comparison, the findings based on the standard method are also included. The scenarios considered are therefore:
- The standard method-based demographic projections;
 - “Medium” housing and population estimates for 2011 commuting ratios;
 - “Medium” housing and population estimates for 1:1 commuting ratios;
 - “Maximum” housing and population estimates for 2011 commuting ratios; and
 - “Maximum” housing and population estimates for 1:1 commuting ratios.
- 1.3 The report presents these demographic projections together with four sets of outputs for Cambridge and South Cambridgeshire (and Greater Cambridge as a whole) in respect of five topic areas:
- Affordable housing need and mix;
 - Housing mix;
 - Older and disabled people need;
 - Student Accommodation; and
 - Housing Needs of other Groups.

Revised demographic projections

- 1.4 For Greater Cambridge, the Standard Method projects a 24.5% increase in population while the maximum scenario (with a 1:1 commuting assumption) forecasts an increase at around 42%.
- 1.5 The revised age structure shows that, for virtually all scenarios, the population aged 65+ is projected to see the highest proportionate increase. However, it is also notable that the higher the projection, the higher the increase in the 16-64 and under 16 age group relative to those aged 65+.
- 1.6 This is because in the modelling an increase in migration is assumed. Migration tends to focus on people of working age (and the children they have).

Affordable housing need

- 1.7 The impact of the analysis on affordable housing need shows that net need for affordable rented tenures will increase substantially from that put forward under the Standard Method scenario. The ranges are set out below:
 - Cambridge: 450 dwellings per annum (dpa) associated with the Standard Method to 577dpa associated with the 1:1 maximum commuting.
 - South Cambridgeshire: 579dpa associated with the Standard Method to 668dpa associated with the 1:1 maximum commuting.
 - Greater Cambridge as a whole: 1,029dpa associated with the Standard Method to 1,246dpa associated with the 1:1 maximum commuting.
- 1.8 The report also considers the impact on need for affordable home ownership. The ranges are set out below:
 - Cambridge: 289dpa associated with the Standard Method to 378dpa associated with the 1:1 maximum commuting.
 - South Cambridgeshire: 195dpa associated with the Standard Method to 252dpa associated with the 1:1 maximum commuting.

- Greater Cambridge as a whole: 484dpa associated with the Standard Method to 630dpa associated with the 1:1 maximum commuting.

- 1.9 That said, while the analysis above shows higher estimates of affordable housing need than the HNSG report it is not considered that this leads to any different conclusions – mainly that the authorities should seek to maximise delivery of affordable housing when opportunities arise.
- 1.10 It is also important to note that the finding of a higher need does not have any impact on overall housing requirements. This is in part because the higher needs are linked to higher levels of delivery, but also due to the complex link between affordable need and overall need (affordable need is not just about the delivery of new housing, with many of those in need already living in self-contained accommodation).

Housing mix

- 1.11 The analysis relating to housing mix shows that, as the housing number increases, the relative proportion of households with dependent children also increases. That said, increases in older age groups are still proportionately higher than for those aged under 65.
- 1.12 As with households with dependent children, as the housing number increases the relative proportion of households headed by a younger person also increases.
- 1.13 The modelled mix emerging for each geography shows very little difference in housing mix outputs for the different scenarios.
- 1.14 The scenarios that foresee higher housing delivery show a need for more larger homes, but differences are minor. This suggests that the conclusions in the HNSG remain sound when applied to different levels of housing delivery.

Older and disabled persons

Older person's housing

- 1.15 The analysis has shown that, while the overall housing requirement number goes up, the number of older people doesn't go up in the same proportion.
- 1.16 Also, the levels of need are similar in different scenarios (albeit older person needs as a proportion of overall need does fall as the housing requirement increases).
- 1.17 As a result, the impact of the demographic projections linked to the scenarios has a limited impact on the need for specialist housing for older people set out in the HNSG report.

Disabled people and wheelchair users

- 1.18 For all scenarios there is a need to increase the supply of homes that are suitable for a variety of residents. It is, therefore, still recommended that all new homes meet the M4(2) Building Regulations standard for accessible and adaptable homes, and that some new homes should meet the M4(3) Building Regulations standard for wheelchair user homes.

Student accommodation

- 1.19 The projections for future growth of purpose-built student accommodation presented in the HNSG report rely on the future growth plans of Anglia Ruskin University and the University of Cambridge. As a result, the different forecasts relating to demographic change examined in this report will not affect the findings presented in the HNSG report.
- 1.20 Analysis of the age structure data relating to each of the scenarios allows forecasts to be made relating to the types of accommodation that will be demanded by students based on how students of different age groups opted for different types of accommodation in 2011.

- 1.21 The data suggests that there will be potentially significant consequences with regards to the type of accommodation that will be demanded by students in future years.

Housing Needs of other Groups

- 1.22 Chapter 10 of the HNSG (housing needs of other groups) considers the housing needs of three groups. These are:
- People who rent their homes;
 - Self-build and custom-build housing; and
 - Service personnel and families.
- 1.23 The assessment of demand for self-build and custom-build housing and the needs of service personnel and families do not draw on the demographic projections to provide an assessment of need. The demographic projections associated with the different scenarios examined in this report will therefore have no impact on demand for housing from these groups.
- 1.24 The HNSG report also does not attempt to estimate the need for additional private rented housing as it sets out that whether people buy or rent their homes is dependent on several factors that can fluctuate over time such as mortgage lending practices, availability of housing related benefit, and existing types and tenures of homes available in the area. The HNSG report however, does look into the demand profile for build to rent (BTR) development. This review found that the majority of residents in BTR are aged between 15 and 44. The report then draws on the demographic projections to discuss the implications this has for demand for BTR over the plan period.
- 1.25 It is therefore possible to apply the revised demographic projections associated with each of the four scenarios to this dataset to understand the possible change in demand for BTR within each.

1.26 Across all geographies the change to the level of growth within the 15-44 age group is substantial.

- In Cambridge the uplift is between 9% for the standard method and around 30% for the maximum (1:1 commuting) scenario.
- In South Cambridgeshire the uplift is between 23% for the standard method and around 45% for the maximum (1:1 commuting) scenario.
- For Greater Cambridge as a whole, the uplift is between 15% for the standard method and 36% for the maximum (1:1 commuting) scenario.

1.27 The HNSG report notes, firstly, that demand for BTR development is likely to focus on urban areas (with the result that Cambridge and its immediately surrounding towns and villages in South Cambridgeshire are likely to be the most suitable locations for such development); secondly, the policy stance should be supportive of BTR across the whole Greater Cambridge geography; and, thirdly, the scale of demand should be monitored so as to ensure the interpretation of policy at the application stage reflects market evidence. The data presented in this report reinforces, but does not change, these recommendations.

2. Introduction

Background

- 2.1 Greater Cambridge Shared Planning (GCSP) has recently commissioned two pieces of work from GL Hearn. These are the Greater Cambridge Housing and Employment Relationships Report (HERR) and the Cambridgeshire and West Suffolk Housing Needs of Specific Groups study (HNSG).
- 2.2 The HERR examines the relationship between demographic change and employment growth and the housing required to address them. To act as a starting point, the report sets out the demographic change associated with fulfilment of the Standard Method based housing target (1,743dpa). The number of jobs this would support was also calculated.
- 2.3 Two further scenarios were also considered that assumed different levels of economic growth in the area, “lower” and “higher”. Modelling was undertaken to identify the number of homes that would be needed to support this growth (i.e., to provide workers with homes) resulting in “medium” and “maximum” forecasts of housing need.
- 2.4 Also, two commuting scenarios were modelled for the jobs, homes and population above those related to the standard method. The continuation of commuting trends reported in Census 2011 and a commuting ratio of 1:1. The latter scenario envisaged the increase in the number of people working in the districts being equal to the number of people living in the districts who are working. The latter scenario, therefore, presents a picture of new jobs being “retained” within the resident population. The result is that more homes are likely to be required.
- 2.5 A range of forecasts for new homes was set out. These are set out in the tables below. The first table shows the lowest requirement; that of 1,743dpa for Greater Cambridge as a whole associated with the standard method.

Table 1: Core Outputs, Jobs Supported from Standard Method in Greater Cambridge, 2020-2041 – per annum

Area	Homes	Population	Jobs Supported
Cambridge City	658	1,401	1,000
South Cambridgeshire	1,085	2,120	1,180
Greater Cambridge	1,743	3,521	2,179

Source: HERR, GL Hearn Analysis of Demographic Projections

- 2.6 The next table (shown below) shows that a maximum of 2,549dpa would be required in the “maximum” economic growth scenario where the 2011 commuting scenario is applied.

Table 2: Projected housing growth, range of job growth forecast, 2011 Commuting Ratio

Scenario	Households 2020	Households 2041	Change in households	Per annum	Dwellings (per annum)
Cambridge City Medium	52,515	70,209	17,694	843	868
Cambridge City Maximum	52,515	72,098	19,583	933	960
South Cambridgeshire Medium	66,514	89,514	23,000	1,095	1,128
South Cambridgeshire Maximum	66,514	98,892	32,378	1,542	1,588
Greater Cambridge Medium	119,029	159,723	40,694	1,938	1,996
Greater Cambridge Maximum	119,029	170,990	51,960	2,474	2,549

Source: HERR, Modelled Outputs

- 2.7 The following table below shows a maximum of 2,690dpa in the “maximum” economic growth scenario where the 1:1 commuting scenario is applied.

Table 3: Projected housing growth, range of job growth forecast, 1:1 Commuting Ratio

Scenario	Households 2020	Households 2041	Change in households	Per annum	Dwellings (per annum)
Cambridge City Medium	52,515	72,704	20,189	961	990
Cambridge City Maximum	52,515	75,694	23,179	1,104	1,137
South Cambridgeshire Medium	66,514	89,356	22,842	1,088	1,120
South Cambridgeshire Maximum	66,514	98,178	31,664	1,508	1,553
Greater Cambridge Medium	119,029	162,060	43,031	2,049	2,111
Greater Cambridge Maximum	119,029	173,872	54,843	2,612	2,690

Source: HERR, Modelled Outputs

2.8 The HNSG study addresses the needs of specific groups as listed in paragraph 62 of the National Planning Policy Framework (NPPF). Its findings are based on the fulfilment of the standard method based housing needs figure.

Purpose

2.9 This report considers the impact on the findings of the HNSG for Cambridge and South Cambridgeshire in respect of the demographic change associated with four scenarios set out in the HERR. Also, for ease of comparison, the findings based on the standard method are also included. The scenarios considered are therefore:

- The standard method-based demographic projections;
- “Medium” housing and population estimates for 2011 commuting ratios;
- “Medium” housing and population estimates for 1:1 commuting ratios;
- “Maximum” housing and population estimates for 2011 commuting ratios; and
- “Maximum” housing and population estimates for 1:1 commuting ratios.

2.10 The report presents these demographic projections together with four sets of outputs for Cambridge and South Cambridgeshire (and Greater Cambridge as a whole) in respect of five topic areas:

- Affordable housing need and mix
- Housing mix
- Older and disabled people need
- Student Accommodation
- Housing Needs of other Groups

3. Revised Demographic Projections

3.1 This section of the report sets out revised demographic projections for the Greater Cambridge area disaggregated to Cambridge and South Cambridge associated with the standard method and the four scenarios.

3.2 Chapter 3 of the HNSG document presents analysis relating to the demographic profile of the study area. Most of this is not influenced by the future projections. For clarity, below is a list of the analysis carried out in the HNSG that has not been re-considered for this report.

- Past Population Trends – including consideration of population growth in the 2011-2019 period (it should be noted that ONS has since published data for 2020);
- Age structure – generally summarised in 5-year age bands and provided for 2019 (as above this data is now available for 2020);
- Components of population change – looking at why populations have changed, including information on births, deaths and migration. The report analysed the 2001-19 period, with data now being available for 2020; and
- Household composition – data initially drawn from the 2011 Census (and hence not updated). Also, some information was drawn from the 2018-based sub-national household projections (SNHP), which again has not been updated.

3.3 For the data above, the reader should refer back to the HNSG report. Where it has been noted that new data has been made available since this report was written, GL Hearn consider it is unlikely that it would make a material change to the outputs in this report. It has therefore not been used.

3.4 Section 5 of the HNSG report then moved on to look at demographic projections, this initially began with consideration of housing need using the Standard Method. Within the report, the Standard Method was based on household growth in the 2020-30 period and an affordability ratio for 2019. Whilst the projections have not

been updated (being the 2014-based SNHP) a different time period (2021-31) would arguably be used if the same calculation were to be carried out now. For the affordability ratio, ONS has now published equivalent data for 2020.

- 3.5 In Chapter 5, the HNSG developed a projection linked to the Standard Method. Essentially this projection took the housing need as calculated and then sought to project how the population and household structures might change if that level of housing delivery were achieved (and these homes were filled, subject to a small allowance for vacant properties). The Standard Method provided a detailed demographic output which can also be put into context with the higher scenarios developed in the HERR.
- 3.6 The analysis began by considering the base population in 2019, this took account of not only the published mid-year population estimates (MYE) from ONS but also estimates from other sources (in this case the Patient Register).
- 3.7 This was done as there were concerns about some of the MYE, particularly for Cambridge, where this source suggested only very modest population growth in the 2011-19 period.
- 3.8 Subsequently both MYE and Patient Register data has been published for 2020. In the HNSG, projections were developed for the 2020-40 period, whereas in the HERR report projections were developed for 2020-41. For this reason, in the GCA the Standard Method-based housing needs figure from the HNSG has been rolled forward for a year to be as included in the HERR so as to provide some comparative data.

Projected population growth

- 3.9 The tables below show projected population growth in the four scenarios studied and compared with the Standard Method (as extended to 2041) and as reported in the HERR. The three tables show data for each of Cambridge, South Cambridgeshire, and Greater Cambridge as a whole.

3.10 Focusing on the table for Greater Cambridge, it can be seen that the Standard Method projects there to be a 24.5% increase in population, with figures going as high as 41.9% for the maximum scenario with a 1:1 commuting assumption. The medium scenarios show population growth in the region of 29%-31%; a projected increase in the number of people of about 88,000-94,000.

3.11 It will be noted that population growth under 1:1 commuting is slightly lower in South Cambridgeshire than for the Census 2011 commuting scenarios. This is because at the time of the Census 2011, the District saw a small level of net out-commuting for work (and hence a 1:1 scenario retains some of the labour-supply that would otherwise be modelled to out-commute). Across the whole of the area however the 1:1 commuting shows higher levels of population growth, this is due to Cambridge seeing a level of net in-commuting for work.

Table 4: Projected population change 2020-2041, Cambridge

Scenario	2020	2041	Change	% change
Standard Method	138,896	168,319	29,423	21.2%
Medium (2011 commuting)	138,896	179,981	41,085	29.6%
Medium (1:1 commuting)	138,896	186,783	47,887	34.5%
Maximum (2011 commuting)	138,896	185,131	46,235	33.3%
Maximum (1:1 commuting)	138,896	194,933	56,037	40.3%

Source: GL Hearn Modelling based on ONS data

Table 5: Projected population change 2020-2041, South Cambridgeshire

Scenario	2020	2041	Change	% change
Standard Method	162,357	206,876	44,520	27.4%
Medium (2011 commuting)	162,357	209,253	46,896	28.9%
Medium (1:1 commuting)	162,357	208,826	46,469	28.6%
Maximum (2011 commuting)	162,357	234,609	72,252	44.5%
Maximum (1:1 commuting)	162,357	232,680	70,324	43.3%

Source: GL Hearn Modelling based on ONS data

Table 6: Projected population change 2020-2041, Greater Cambridge

Scenario	2020	2041	Change	% change
Standard Method	301,253	375,195	73,943	24.5%
Medium (2011 commuting)	301,253	389,234	87,982	29.2%
Medium (1:1 commuting)	301,253	395,609	94,356	31.3%
Maximum (2011 commuting)	301,253	419,740	118,488	39.3%
Maximum (1:1 commuting)	301,253	427,613	126,361	41.9%

Source: GL Hearn Modelling based on ONS data

Age Structure

3.12 Appendix A provides a series of tables looking at how the population is projected to change under each of the scenarios (including the Standard Method rolled out to 2041). The tables below show a summary of this data split into three broad age groups, which can generally be described as:

- children (under 16);
- working-age (16-64); and
- pensionable age (65+).

3.13 The analysis shows for virtually all scenarios that the population aged 65+ is projected to see the highest proportionate increases in population. However, it is also notable that the higher the projection, the higher the increase in the 16-64 and under 16 age group relative to those aged 65+.

3.14 This is because in the modelling an increase in migration is assumed. Migration tends to focus on people of working age (and their associated children).

3.15 Looking at the third table below (which shows data for Greater Cambridge) it can be seen with the Standard Method that the number of people aged 65+ is projected to increase by 34.3%. This figure only increases slightly (to 37.4%) when linked to the highest of the demographic projections (Maximum (1:1 commuting)).

3.16 For people aged 16-64, there is a more notable change in moving towards the higher projections. With the number of people in this age group projected to increase by 26.8%, compared with 15.6% when linked to the Standard Method.

Table 7: Projected change in population by broad age group 2020-2041, Cambridge

Scenario	Age	2020	2041	Change	% change
Standard Method	Under 16	22,051	28,039	5,988	27.2%
Standard Method	16-64	100,255	115,272	15,017	15.0%
Standard Method	65+	16,591	25,008	8,417	50.7%
Standard Method	TOTAL	138,896	168,319	29,423	21.2%
Medium (2011 commuting)	Under 16	22,051	30,953	8,902	40.4%
Medium (2011 commuting)	16-64	100,255	123,606	23,352	23.3%
Medium (2011 commuting)	65+	16,591	25,422	8,832	53.2%
Medium (2011 commuting)	TOTAL	138,896	179,981	41,085	29.6%
Medium (1:1 commuting)	Under 16	22,051	32,652	10,601	48.1%
Medium (1:1 commuting)	16-64	100,255	128,467	28,213	28.1%
Medium (1:1 commuting)	65+	16,591	25,664	9,073	54.7%
Medium (1:1 commuting)	TOTAL	138,896	186,783	47,887	34.5%
Maximum (2011 commuting)	Under 16	22,051	32,239	10,188	46.2%
Maximum (2011 commuting)	16-64	100,255	127,287	27,032	27.0%
Maximum (2011 commuting)	65+	16,591	25,605	9,015	54.3%
Maximum (2011 commuting)	TOTAL	138,896	185,131	46,235	33.3%
Maximum (1:1 commuting)	Under 16	22,051	34,688	12,637	57.3%
Maximum (1:1 commuting)	16-64	100,255	134,292	34,037	34.0%
Maximum (1:1 commuting)	65+	16,591	25,953	9,363	56.4%
Maximum (1:1 commuting)	TOTAL	138,896	194,933	56,037	40.3%

Source: GL Hearn Modelling based on ONS data

Table 8: Projected change in population by broad age group 2020-2041, South Cambridgeshire

Scenario	Age	2020	2041	Change	% change
Standard Method	Under 16	32,174	38,641	6,467	20.1%
Standard Method	16-64	99,327	121,065	21,739	21.9%
Standard Method	65+	30,856	47,170	16,314	52.9%
Standard Method	TOTAL	162,357	206,876	44,520	27.4%
Medium (2011 commuting)	Under 16	32,174	39,200	7,026	21.8%
Medium (2011 commuting)	16-64	99,327	122,641	23,315	23.5%
Medium (2011 commuting)	65+	30,856	47,412	16,556	53.7%
Medium (2011 commuting)	TOTAL	162,357	209,253	46,896	28.9%
Medium (1:1 commuting)	Under 16	32,174	39,099	6,925	21.5%
Medium (1:1 commuting)	16-64	99,327	122,358	23,031	23.2%
Medium (1:1 commuting)	65+	30,856	47,368	16,512	53.5%
Medium (1:1 commuting)	TOTAL	162,357	208,826	46,469	28.6%
Maximum (2011 commuting)	Under 16	32,174	45,164	12,990	40.4%
Maximum (2011 commuting)	16-64	99,327	139,454	40,127	40.4%
Maximum (2011 commuting)	65+	30,856	49,992	19,135	62.0%
Maximum (2011 commuting)	TOTAL	162,357	234,609	72,252	44.5%
Maximum (1:1 commuting)	Under 16	32,174	44,710	12,536	39.0%
Maximum (1:1 commuting)	16-64	99,327	138,175	38,848	39.1%
Maximum (1:1 commuting)	65+	30,856	49,795	18,939	61.4%
Maximum (1:1 commuting)	TOTAL	162,357	232,680	70,324	43.3%

Source: GL Hearn Modelling based on ONS data

Table 9: Projected change in population by broad age group 2020-2041, Greater Cambridge

Scenario	Age	2020	2041	Change	% change
Standard Method	Under 16	54,225	66,680	12,455	18.7%
Standard Method	16-64	199,581	236,337	36,756	15.6%
Standard Method	65+	47,447	72,178	24,731	34.3%
Standard Method	TOTAL	301,253	375,195	73,943	19.7%
Medium (2011 commuting)	Under 16	54,225	70,153	15,928	22.7%
Medium (2011 commuting)	16-64	199,581	246,248	46,667	19.0%
Medium (2011 commuting)	65+	47,447	72,834	25,387	34.9%
Medium (2011 commuting)	TOTAL	301,253	389,234	87,982	22.6%
Medium (1:1 commuting)	Under 16	54,225	71,751	17,526	24.4%
Medium (1:1 commuting)	16-64	199,581	250,826	51,244	20.4%
Medium (1:1 commuting)	65+	47,447	73,032	25,586	35.0%
Medium (1:1 commuting)	TOTAL	301,253	395,609	94,356	23.9%
Maximum (2011 commuting)	Under 16	54,225	77,403	23,178	29.9%
Maximum (2011 commuting)	16-64	199,581	266,740	67,159	25.2%
Maximum (2011 commuting)	65+	47,447	75,597	28,150	37.2%
Maximum (2011 commuting)	TOTAL	301,253	419,740	118,488	28.2%
Maximum (1:1 commuting)	Under 16	54,225	79,398	25,173	31.7%
Maximum (1:1 commuting)	16-64	199,581	272,466	72,885	26.8%
Maximum (1:1 commuting)	65+	47,447	75,749	28,302	37.4%
Maximum (1:1 commuting)	TOTAL	301,253	427,613	126,361	29.6%

Source: GL Hearn Modelling based on ONS data

4. Affordable Housing Need

- 4.1 In this chapter the impact of the changes in demography associated with the four scenarios on the findings set out in chapter 6 of the HNSG (affordable housing need) is examined. Need associated with demographic projections based on the standard method are also provided for comparison. The findings are disaggregated to Cambridge and South Cambridgeshire.
- 4.2 This analysis identifies variations between these outputs and those set out in the HNSG and provides a commentary explaining why these variations have arisen.

Affordable Housing Need

- 4.3 The section below updates the analysis of affordable need by linking to the various projections described in the previous chapter. The HNSG report provides a detailed methodology for affordable housing need with the estimates being split between a need for rented affordable housing (mainly social and affordable rents) and affordable home ownership (which might now include First Homes).
- 4.4 Large parts of the assessment of affordable housing need is not impacted by using updated projections. This is because it is only the number of newly forming households that will change within the modelling (current needs and estimates of existing households falling into need will remain the same).
- 4.5 However, it should be noted that, over time, it is possible that estimates for groups other than newly-forming households could change as a result of different levels of house building (as indeed could estimates of re-let supply if affordable housing delivery were to increase). That said, at this point it is unclear what impact additional homes might have.
- 4.6 Even the analysis of newly forming households is slightly complicated by using the Standard Method and the higher projections. This is because part of the modelling works on the basis that higher housing delivery will provide opportunities for younger households to form (by improving affordability). Taking

rates of newly forming households direct from the projections would, therefore, arguably show too many households in need.

- 4.7 Linking the Standard Method and the variant projections developed in the HERR report a further method has, therefore, been developed. This uses the population structure, but links this back to trend-based levels of household formation (rather than the more positive one of increased housing delivery providing increased household formation).
- 4.8 To serve as a reminder, the method used to look at population and household change in the Standard Method includes assumptions about both increased (net) in-migration and improvements to household formation.
- 4.9 If newly forming households were modelled on the basis of an uplifted set of household formation rates then the affordable need would be shown to be higher.
- 4.10 However, the uplifts to the Standard Method are designed (at least in part) to reflect the improving affordability of providing more homes. If we are seeking to improve affordability, then it would be wrong to also show a higher affordable need given the uplift is about improving affordability. If more households can afford a new home because housing is getting more affordable, it would be wrong to also suggest a higher affordable need.
- 4.11 In reality, the revised method does not make a significant difference to the figures but does prevent double counting. It is also closer to the method used in the HNSG report (which just took official projections as published).
- 4.12 The tables below therefore set out estimates of affordable need from the various scenarios. The estimates for the Standard Method differ from those in the HNSG due to the use of the revised methodology explained above and also as the annual figures have been extended to 2041.
- 4.13 For contrast, the tables include the original standard method-based figures from the HNSG report. This shows a lower need for both Cambridge and South

Cambridgeshire. This is due to the modelling of newly forming households within the HNSG not being based on an uplifted projection.

4.14 The impact of this is particularly evident in Cambridge (note the figures from the HNSG are still per annum in the 2020-40 period, but because a per annum figure is used this will not have any significant impact on the findings).

Table 10: Estimated annual need for social/affordable rent housing by scenario, Cambridge

Scenario	Current need	Newly forming households	Existing households falling into need	Total Gross Need	Relet Supply	Net Need
HNSG	81	299	321	701	386	314
Standard Method	77	438	321	836	386	450
Medium (2011 commuting)	77	494	321	892	386	506
Medium (1:1 commuting)	77	526	321	925	386	538
Maximum (2011 commuting)	77	518	321	917	386	530
Maximum (1:1 commuting)	77	565	321	964	386	577

Source: Derived from a range of sources as set out in housing needs study

Table 11: Estimated annual need for social/affordable rent housing by scenario, South Cambridgeshire

Scenario	Current need	Newly forming households	Existing households falling into need	Total Gross Need	Relet Supply	Net Need
HNSG	47	470	129	646	212	435
Standard Method	45	616	129	790	212	579
Medium (2011 commuting)	45	625	129	799	212	587
Medium (1:1 commuting)	45	623	129	797	212	585
Maximum (2011 commuting)	45	713	129	887	212	675
Maximum (1:1 commuting)	45	706	129	880	212	668

Source: Derived from a range of sources as set out in housing needs study

Table 12: Estimated annual need for social/affordable rent housing by scenario, Greater Cambridge

Scenario	Current need	Newly forming households	Existing households falling into need	Total Gross Need	Relet Supply	Net Need
HNSG	128	769	450	1,347	598	749
Standard Method	122	1,054	450	1,627	598	1,029
Medium (2011 commuting)	122	1,118	450	1,691	598	1,093
Medium (1:1 commuting)	122	1,149	450	1,722	598	1,124
Maximum (2011 commuting)	122	1,231	450	1,804	598	1,205
Maximum (1:1 commuting)	122	1,271	450	1,844	598	1,246

Source: Derived from a range of sources as set out in housing needs study

4.15 The tables below show the same analysis, but with a focus on need for affordable home ownership. Again, the figures from the HNSG have been included and caution needs to be exercised given the different approach to newly forming households.

Table 13: Estimated annual need for affordable home ownership by scenario, Cambridge

Scenario	Current need	Newly forming households	Existing households falling into need	Total Gross Need	Relet Supply	Net Need
HNSG	35	208	106	349	150	199
Standard Method	34	305	101	439	150	289
Medium (2011 commuting)	34	343	101	478	150	328
Medium (1:1 commuting)	34	366	101	501	150	351
Maximum (2011 commuting)	34	360	101	495	150	345
Maximum (1:1 commuting)	34	393	101	528	150	378

Source: Derived from a range of sources as set out in housing needs study

Table 14: Estimated annual need for affordable home ownership by scenario, South Cambridgeshire

Scenario	Current need	Newly forming households	Existing households falling into need	Total Gross Need	Relet Supply	Net Need
HNSG	17	301	50	367	263	105
Standard Method	16	394	48	458	263	195
Medium (2011 commuting)	16	399	48	463	263	200
Medium (1:1 commuting)	16	398	48	462	263	199
Maximum (2011 commuting)	16	456	48	519	263	257
Maximum (1:1 commuting)	16	451	48	515	263	252

Source: Derived from a range of sources as set out in housing needs study

Table 15: Estimated annual need for affordable home ownership by scenario, Greater Cambridge

Scenario	Current need	Newly forming households	Existing households falling into need	Total Gross Need	Relet Supply	Net Need
HNSG	52	508	156	716	413	304
Standard Method	50	699	149	897	413	484
Medium (2011 commuting)	50	743	149	941	413	528
Medium (1:1 commuting)	50	764	149	963	413	550
Maximum (2011 commuting)	50	816	149	1,014	413	602
Maximum (1:1 commuting)	50	844	149	1,043	413	630

Source: Derived from a range of sources as set out in housing needs study

4.16 Analysis within Chapter 6 (affordable housing need) of the HNSG also contained a significant amount of other data, but data which is not directly impacted by the projections used. Below is a brief summary of the information, and the reader should refer back to the HNSG report for detailed information.

- Data was drawn from Land Registry and ONS private rented sector data to establish the entry-level prices and rents in each area. This data was for the year to March 2020. It is not available to March 2021;

- Income estimates were made for 2019 (drawing on a range of sources). Whilst many of the sources used have not been updated, there is now some income information (from the Annual Survey of Hours and Earnings, ASHE) to 2020. For Cambridge this source suggests earnings increased in this period (2019-20) with the opposite being seen for South Cambridgeshire. However, it is not considered that utilising this information would have any great impact on the analysis. This is partly due to the affordability analysis being based on household incomes (with earnings just used as a check) and the fact that the ASHE source does have quite high error margins, meaning it is difficult to know if the year-on-year changes are just due to statistical significance;
- Within the modelling, estimates of the supply of re-lets, affordable home ownership re-sales and 'cheaper' market dwellings have been estimated. This dates to a range of timeframes (in 2019 or 2020) and in all cases more recent data would now be available (although unlikely to see any notable changes);
- Analysis considered the split of need between social and affordable rented housing. Given that this did not directly link to the projections, there is no change to this analysis (although it would be moderately impacted by data about prices, rents and incomes); and
- Analysis looked at a range of types of affordable home ownership and the pricing of this housing. Again this is not linked to the projections (but again could be moderately impacted by data about prices, rents and incomes).

Implications for HNSG findings

4.17 Overall, whilst the analysis above shows some different (and higher) estimates of affordable housing need than the HNSG report it is not considered that this leads to any different conclusions – mainly that the authorities should seek to maximise delivery of affordable housing when opportunities arise.

4.18 Also, the finding of a higher need does not have any impact on overall housing requirements. This is in part because the higher needs are linked to higher levels of delivery, but also due to the complex link between affordable need and overall need (affordable need is not just about the delivery of new housing, with many of those in need already living in self-contained accommodation).

5. Housing Mix

- 5.1 In this chapter the impact of the changes in demography associated with the four scenarios on the findings set out in chapter 7 of the HNSG (housing mix) is examined. Housing mix associated with demographic projections based on the standard method are also provided for comparison. The findings are disaggregated to Cambridge and South Cambridgeshire.
- 5.2 This analysis identifies variations between these outputs and those set out in the HNSG and provides a commentary explaining why these variations have arisen.
- 5.3 The housing mix section of the HNSG report presents an appropriate mix of housing (by size) in each of three broad tenure groups (market, affordable home ownership and social/affordable rented).
- 5.4 The method used links demographic projections to information about occupancy patterns (i.e. the sizes of homes typically occupied by different age groups in different tenures). The analysis does therefore directly link to the projections developed (and in the case of the HNSG, this was linked to the Standard Method).
- 5.5 The report also includes a range of background data which was not derived from projections. As a result, this has not been updated here, and the reader should refer back to the HNSG report for detailed information. This includes:
- Census data about the number (and type) of households with dependent children, and how this changed in the 2001-11 period;
 - Census data about the tenure of households with dependent children (and by household type, e.g. married couple and lone parents); and
 - Census data about households with non-dependent children and how this has changed over time.
- 5.6 Analysis was also provided to look at projected changes to the number of children (people aged Under 16). This has not been provided in this section as the

information is already available earlier in this document in the revised demographic projections chapter when looking at projected changes by age.

5.7 Furthermore, analysis was provided to estimate how household types might change and the five tables below show this data for the whole of the Greater Cambridge area. Similar tables are provided in Appendix C for each of Cambridge and South Cambridgeshire.

5.8 The analysis shows that, as the housing number increases, the relative proportion of households with dependent children also increases. That said, increases in older age groups are still proportionately higher than for those aged Under 65.

Table 16: Projected change in household types in Greater Cambridge, 2020-2041, standard method

Household Type	2020	2041	Change in households	% Change
One-person household (aged 65 and over)	14,109	19,822	5,713	40.5%
One-person household (aged under 65)	19,379	23,813	4,434	22.9%
Couple (aged 65 and over)	14,330	23,771	9,441	65.9%
Couple (aged under 65)	18,073	17,376	-698	-3.9%
A couple and one or more other adults: No dependent children	8,706	12,636	3,930	45.1%
Households with one dependent child	14,948	19,536	4,588	30.7%
Households with two dependent children	14,234	17,257	3,024	21.2%
Households with three dependent children	5,082	5,466	384	7.6%
Other households	10,168	14,886	4,719	46.4%
Total	119,029	154,563	35,534	29.9%
Total households with dependent children	34,263	42,258	7,995	23.3%

Source: Demographic Projections based on ONS Data

Table 17: Projected change in household types in Greater Cambridge, 2020-2041, medium 2011 commuting

Household Type	2020	2041	Change in households	% Change
One-person household (aged 65 and over)	14,109	20,028	5,919	42.0%
One-person household (aged under 65)	19,379	24,903	5,524	28.5%
Couple (aged 65 and over)	14,330	23,967	9,636	67.2%
Couple (aged under 65)	18,073	18,265	191	1.1%
A couple and one or more other adults: No dependent children	8,706	12,948	4,242	48.7%
Households with one dependent child	14,948	20,410	5,462	36.5%
Households with two dependent children	14,234	17,901	3,668	25.8%
Households with three dependent children	5,082	5,692	610	12.0%
Other households	10,168	15,607	5,440	53.5%
Total	119,029	159,723	40,694	34.2%
Total households with dependent children	34,263	44,004	9,741	28.4%

Source: Demographic Projections based on ONS Data

Table 18: Projected change in household types in Greater Cambridge, 2020-2041, Medium 1:1 commuting

Household Type	2020	2041	Change in households	% Change
One-person household (aged 65 and over)	14,109	20,101	5,992	42.5%
One-person household (aged under 65)	19,379	25,442	6,062	31.3%
Couple (aged 65 and over)	14,330	24,011	9,681	67.6%
Couple (aged under 65)	18,073	18,687	614	3.4%
A couple and one or more other adults: No dependent children	8,706	13,085	4,378	50.3%
Households with one dependent child	14,948	20,798	5,850	39.1%
Households with two dependent children	14,234	18,160	3,927	27.6%
Households with three dependent children	5,082	5,789	707	13.9%
Other households	10,168	15,986	5,819	57.2%
Total	119,029	162,060	43,031	36.2%
Total households with dependent children	34,263	44,747	10,484	30.6%

Source: Demographic Projections based on ONS Data

Table 19: Projected change in household types in Greater Cambridge, 2020-2041, Maximum 2011 commuting

Household Type	2020	2041	Change in households	% Change
One-person household (aged 65 and over)	14,109	20,755	6,646	47.1%
One-person household (aged under 65)	19,379	26,686	7,307	37.7%
Couple (aged 65 and over)	14,330	24,971	10,641	74.3%
Couple (aged under 65)	18,073	19,946	1,873	10.4%
A couple and one or more other adults: No dependent children	8,706	13,697	4,991	57.3%
Households with one dependent child	14,948	22,444	7,496	50.1%
Households with two dependent children	14,234	19,751	5,518	38.8%
Households with three dependent children	5,082	6,261	1,180	23.2%
Other households	10,168	16,478	6,310	62.1%
Total	119,029	170,990	51,960	43.7%
Total households with dependent children	34,263	48,456	14,193	41.4%

Source: Demographic Projections based on ONS Data

Table 20: Projected change in household types in Greater Cambridge, 2020-2041, Maximum 1:1 commuting

Household Type	2020	2041	Change in households	% Change
One-person household (aged 65 and over)	14,109	20,826	6,717	47.6%
One-person household (aged under 65)	19,379	27,392	8,012	41.3%
Couple (aged 65 and over)	14,330	24,986	10,656	74.4%
Couple (aged under 65)	18,073	20,485	2,412	13.3%
A couple and one or more other adults: No dependent children	8,706	13,861	5,154	59.2%
Households with one dependent child	14,948	22,912	7,965	53.3%
Households with two dependent children	14,234	20,040	5,806	40.8%
Households with three dependent children	5,082	6,376	1,294	25.5%
Other households	10,168	16,994	6,827	67.1%
Total	119,029	173,872	54,843	46.1%
Total households with dependent children	34,263	49,328	15,065	44.0%

Source: Demographic Projections based on ONS Data

5.9 Analysis within the housing mix section of the HNSG also looked at changes to households by the age of the household reference person (essentially the head

of household). It was this data that was taken forward into the modelling of mix (by size).

5.10 The series of tables below show this information for each of the scenarios for Greater Cambridge. The same information is also provided for Cambridge and South Cambridgeshire separately in Appendix B.

5.11 As with previous analysis, as the housing number increases the relative proportion of households headed by a younger person also increases.

Table 21: Projected change in households by age of household reference person in Greater Cambridge, 2020-2041, standard method

Age	2020	2041	Change in households	% Change
16-24	3,671	4,569	898	24.5%
25-29	7,635	8,829	1,193	15.6%
30-34	10,072	10,740	668	6.6%
35-39	10,904	11,496	592	5.4%
40-44	11,370	13,036	1,667	14.7%
45-49	11,344	13,893	2,549	22.5%
50-54	11,556	15,041	3,485	30.2%
55-59	10,892	13,979	3,087	28.3%
60-64	9,241	13,005	3,764	40.7%
65-69	8,136	11,649	3,513	43.2%
70-74	7,927	11,113	3,186	40.2%
75-79	6,100	9,893	3,794	62.2%
80-84	4,847	7,822	2,975	61.4%
85 & over	5,336	9,499	4,164	78.0%
Total	119,029	154,566	35,537	29.9%

Source: Demographic Projections based on ONS data

Table 22: Projected change in households by age of household reference person in Greater Cambridge, 2020-2041, medium 2011 commuting

Age	2020	2041	Change in households	% Change
16-24	3,671	4,758	1,087	29.6%
25-29	7,635	9,359	1,723	22.6%
30-34	10,072	11,555	1,483	14.7%
35-39	10,904	12,499	1,595	14.6%
40-44	11,370	13,870	2,500	22.0%
45-49	11,344	14,417	3,072	27.1%
50-54	11,556	15,404	3,848	33.3%
55-59	10,892	14,225	3,334	30.6%
60-64	9,241	13,186	3,945	42.7%
65-69	8,136	11,790	3,654	44.9%
70-74	7,927	11,231	3,304	41.7%
75-79	6,100	9,982	3,882	63.6%
80-84	4,847	7,879	3,032	62.6%
85 & over	5,336	9,568	4,233	79.3%
Total	119,029	159,723	40,694	34.2%

Source: Demographic Projections based on ONS data

Table 23: Projected change in households by age of household reference person in Greater Cambridge, 2020-2041, medium 1:1 commuting

Age	2020	2041	Change in households	% Change
16-24	3,671	4,854	1,184	32.2%
25-29	7,635	9,616	1,981	25.9%
30-34	10,072	11,951	1,879	18.7%
35-39	10,904	12,994	2,090	19.2%
40-44	11,370	14,267	2,897	25.5%
45-49	11,344	14,647	3,303	29.1%
50-54	11,556	15,554	3,998	34.6%
55-59	10,892	14,322	3,431	31.5%
60-64	9,241	13,252	4,012	43.4%
65-69	8,136	11,839	3,703	45.5%
70-74	7,927	11,271	3,344	42.2%
75-79	6,100	10,011	3,911	64.1%
80-84	4,847	7,895	3,049	62.9%
85 & over	5,336	9,587	4,251	79.7%
Total	119,029	162,060	43,031	36.2%

Source: Demographic Projections based on ONS data

Table 24: Projected change in households by age of household reference person in Greater Cambridge, 2020-2041, Maximum 2011 commuting

Age	2020	2041	Change in households	% Change
16-24	3,671	5,023	1,352	36.8%
25-29	7,635	10,281	2,646	34.7%
30-34	10,072	12,973	2,900	28.8%
35-39	10,904	14,152	3,248	29.8%
40-44	11,370	15,438	4,069	35.8%
45-49	11,344	15,650	4,306	38.0%
50-54	11,556	16,395	4,839	41.9%
55-59	10,892	14,962	4,070	37.4%
60-64	9,241	13,792	4,551	49.3%
65-69	8,136	12,298	4,162	51.2%
70-74	7,927	11,678	3,751	47.3%
75-79	6,100	10,331	4,231	69.4%
80-84	4,847	8,126	3,280	67.7%
85 & over	5,336	9,890	4,555	85.4%
Total	119,029	170,990	51,960	43.7%

Source: Demographic Projections based on ONS data

Table 25: Projected change in households by age of household reference person in greater Cambridge, 2020-2041, maximum 1:1 commuting

Age	2020	2041	Change in households	% Change
16-24	3,671	5,152	1,482	40.4%
25-29	7,635	10,616	2,980	39.0%
30-34	10,072	13,487	3,414	33.9%
35-39	10,904	14,800	3,896	35.7%
40-44	11,370	15,945	4,576	40.2%
45-49	11,344	15,928	4,584	40.4%
50-54	11,556	16,566	5,010	43.4%
55-59	10,892	15,067	4,176	38.3%
60-64	9,241	13,859	4,618	50.0%
65-69	8,136	12,344	4,208	51.7%
70-74	7,927	11,713	3,787	47.8%
75-79	6,100	10,355	4,256	69.8%
80-84	4,847	8,138	3,292	67.9%
85 & over	5,336	9,901	4,566	85.6%
Total	119,029	173,872	54,843	46.1%

Source: Demographic Projections based on ONS data

5.12 When looking at the mix of housing, analysis in the HNSG report considered the mix using both local and regional occupancy patterns. Conclusions were drawn from a combination of this data, along with consideration of the Housing Register (when concluding on a mix in the social/affordable rented sector).

5.13 The analysis below replicates this data for the Greater Cambridge area and for each of the scenarios, with Appendix B data showing the same outputs for each local authority. It should be noted that the conclusions around mix in the HNSG did not only draw on the modelled data.

5.14 The tables below show the modelled mix required for each of the scenarios, for the whole Greater Cambridge area.

Table 26: Modelled mix of housing by size and scenario, Greater Cambridge, market housing (local occupancy patterns)

Scenario	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Standard Method	4%	19%	42%	36%
Medium (2011 commuting)	4%	19%	41%	36%
Medium (1:1 commuting)	4%	19%	41%	36%
Maximum (2011 commuting)	4%	19%	41%	37%
Maximum (1:1 commuting)	4%	19%	41%	37%

Source: Housing Market Model

Table 27: Modelled mix of housing by size and scenario, Greater Cambridge, market housing (regional occupancy patterns)

Scenario	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Standard Method	4%	24%	46%	26%
Medium (2011 commuting)	4%	24%	46%	27%
Medium (1:1 commuting)	4%	24%	46%	27%
Maximum (2011 commuting)	4%	23%	46%	27%
Maximum (1:1 commuting)	4%	23%	46%	27%

Source: Housing Market Model

Table 28: Modelled mix of housing by size and scenario, Greater Cambridge, affordable home ownership (local occupancy patterns)

Scenario	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Standard Method	22%	33%	28%	17%
Medium (2011 commuting)	23%	33%	28%	17%
Medium (1:1 commuting)	23%	33%	27%	16%
Maximum (2011 commuting)	23%	34%	27%	16%
Maximum (1:1 commuting)	23%	34%	27%	16%

Source: Housing Market Model

Table 29: Modelled mix of housing by size and scenario, Greater Cambridge, affordable home ownership (regional occupancy patterns)

Scenario	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Standard Method	22%	39%	30%	10%
Medium (2011 commuting)	22%	39%	30%	10%
Medium (1:1 commuting)	22%	39%	30%	10%
Maximum (2011 commuting)	21%	39%	30%	10%
Maximum (1:1 commuting)	21%	39%	30%	10%

Source: Housing Market Model

Table 30: Modelled mix of housing by size and scenario, Greater Cambridge, social/affordable rented (local occupancy patterns)

Scenario	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Standard Method	32%	36%	29%	3%
Medium (2011 commuting)	31%	36%	29%	3%
Medium (1:1 commuting)	31%	36%	29%	3%
Maximum (2011 commuting)	31%	36%	29%	4%
Maximum (1:1 commuting)	31%	36%	29%	4%

Source: Housing Market Model

Table 31: Modelled mix of housing by size and scenario, Greater Cambridge, social/affordable rented (regional occupancy patterns)

Scenario	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Standard Method	34%	32%	31%	3%
Medium (2011 commuting)	33%	32%	31%	3%
Medium (1:1 commuting)	33%	33%	31%	3%
Maximum (2011 commuting)	32%	33%	31%	3%
Maximum (1:1 commuting)	32%	33%	32%	4%

Source: Housing Market Model

5.15 In addition, the section on housing mix discussed the role of bungalows and also built-form (flats vs. houses). None of this analysis linked to the projections and so is not updated or repeated in this report.

Implications for HNSG findings

5.16 Interestingly, the analysis above shows very little difference in outputs for the different scenarios. Arguably those that foresee higher housing delivery show a need for more larger homes, but differences are really very minor. This would suggest that the conclusions in the HNSG (which as noted are not just based on the modelling) remain sound to be applied to different levels of housing delivery.

6. Older and Disabled People Need

- 6.1 In this chapter the impact of the changes in demography associated with the four scenarios on the findings set out in chapter 8 of the HNSG (older and disabled persons) is examined. The housing need for these groups associated with demographic projections based on the standard method are also provided for comparison. The findings are disaggregated to Cambridge and South Cambridgeshire.
- 6.2 This analysis identifies variations between these outputs and those set out in the HNSG and provides a commentary explaining why these variations have arisen.
- 6.3 The HNSG report considers the housing needs of older person households and households with a disability concurrently given the strong link between old age and disability. There are a number of analyses linked to the projections which are provided below.
- 6.4 The HNSG analysis began by setting out data from 2019 on the older person population. While it is now the case that ONS have published data for 2020, this has not been used in this report as to do so would not make a material difference to its findings. Population projections were also provided, linked to the Standard Method. The projections looked at a range of age bands; these have been provided in Appendix C.
- 6.5 Census data was then used to look at a range of characteristics of older people, including tenure and levels of under-occupancy. This data has not been updated since the report was drafted.
- 6.6 The first analysis linking to the projections was to estimate current and future needs for specialist accommodation for older people. The initial analysis looked at 'housing with support' – which might be described as sheltered/retirement housing and 'housing with care' – which would include extra-care housing.

6.7 The tables below show the need for different types (and tenure) of housing under each of the scenarios. The analysis shows that as the overall housing requirement number goes up, the number of older people doesn't go up in the same proportion. This is because the age mix of the population doesn't all rise equally; for example, younger people and families would see larger proportional rises.

6.8 The difference in the growth in different groups within the population can be accounted for by much of the uplift to housing numbers being projected among the younger and working-age population. Equivalent tables for Cambridge and South Cambridgeshire can be found in Appendix C.

Table 32: Specialist housing need using SHOP@ assumptions, 2020-2041, Greater Cambridge (units), standard method

Type of housing	Housing demand per 1,000 75+	Current Supply	2020 Demand	Current Shortfall/ Surplus	Additional Demand to 2041	Shortfall/ Surplus by 2041
Housing with Support (rented)	40	2,276	900	-1,376	622	-754
Housing with Support (leasehold)	73	634	1,645	1,011	1,146	2,157
Housing with Care (rented)	17	336	393	57	272	329
Housing with Care (leasehold)	23	94	523	429	365	794
Total	153	3,340	3,461	121	2,405	2,526

Source: Derived from Demographic Projections and Housing LIN/EAC

Table 33: Specialist housing need using SHOP@ assumptions, 2020-2041, Greater Cambridge (units), medium (2011 commuting)

Type of housing	Housing demand per 1,000 75+	Current Supply	2020 Demand	Current Shortfall/ Surplus	Additional Demand to 2041	Shortfall/ Surplus by 2041
Housing with Support (rented)	40	2,276	900	-1,376	635	-741
Housing with Support (leasehold)	73	634	1,645	1,011	1,168	2,179
Housing with Care (rented)	17	336	393	57	277	335
Housing with Care (leasehold)	23	94	523	429	371	800
Total	153	3,340	3,461	121	2,451	2,573

Source: Derived from Demographic Projections and Housing LIN/EAC

Table 34: Specialist housing need using SHOP@ assumptions, 2020-2041, Greater Cambridge(units), medium (1:1 commuting)

Type of housing	Housing demand per 1,000 75+	Current Supply	2020 Demand	Current Shortfall/ Surplus	Additional Demand to 2041	Shortfall/ Surplus by 2041
Housing with Support (rented)	40	2,276	900	-1,376	639	-737
Housing with Support (leasehold)	73	634	1,645	1,011	1,174	2,185
Housing with Care (rented)	17	336	393	57	279	336
Housing with Care (leasehold)	23	94	523	429	373	802
Total	153	3,340	3,461	121	2,466	2,587

Source: Derived from Demographic Projections and Housing LIN/EAC

Table 35: Specialist housing need using SHOP@ assumptions, 2020-2041, Greater Cambridge (units), maximum (2011 commuting)

Type of housing	Housing demand per 1,000 75+	Current Supply	2020 Demand	Current Shortfall/ Surplus	Additional Demand to 2041	Shortfall/ Surplus by 2041
Housing with Support (rented)	40	2,276	900	-1,376	683	-692
Housing with Support (leasehold)	73	634	1,645	1,011	1,263	2,274
Housing with Care (rented)	17	336	393	57	299	356
Housing with Care (leasehold)	23	94	523	429	402	831
Total	153	3,340	3,461	121	2,647	2,769

Source: Derived from Demographic Projections and Housing LIN/EAC

Table 36: Specialist housing need using SHOP@ assumptions, 2020-2041, Greater Cambridge (units), maximum (1:1 commuting)

Type of housing	Housing demand per 1,000 75+	Current Supply	2020 Demand	Current Shortfall/ Surplus	Additional Demand to 2041	Shortfall/ Surplus by 2041
Housing with Support (rented)	40	2,276	900	-1,376	687	-689
Housing with Support (leasehold)	73	634	1,645	1,011	1,268	2,279
Housing with Care (rented)	17	336	393	57	300	358
Housing with Care (leasehold)	23	94	523	429	403	832
Total	153	3,340	3,461	121	2,658	2,780

Source: Derived from Demographic Projections and Housing LIN/EAC

6.9 The analysis also considered the need for care bedspaces (residential and nursing care) with the table below showing estimated need for Greater Cambridge for each of the five scenarios. Data for the two authorities can be found in Appendix C.

Table 37: Older persons' care bed-space requirements, 2020-2041, greater Cambridge

Scenario	Housing demand per 1,000 75+	Current Supply	2020 Demand	Current Shortfall/ Surplus	Additional Demand to 2041	Shortfall/ Surplus by 2041
Standard Method	99	1,912	2,240	328	1,556	1,884
Medium (2011 commuting)	99	1,912	2,240	328	1,586	1,914
Medium (1:1 commuting)	99	1,912	2,240	328	1,595	1,923
Maximum (2011 commuting)	99	1,912	2,240	328	1,713	2,041
Maximum (1:1 commuting)	99	1,912	2,240	328	1,720	2,048

Source: Derived from Demographic Projections and Housing LIN/HOPSR/EAC

- 6.10 Analysis in the report then considered people with disabilities. This began with setting out the overall number of households and the population with a limiting long-term health problem or disability (LTHPD).
- 6.11 The age structure of the population with a disability was also provided. This data came from the 2011 Census and therefore is not updated by the projections.
- 6.12 The age structure of those with a disability was, however, over-laid onto the projections to look at likely increases in the number of people with a disability. Projections for the 2020-41 period and the five scenarios are set out in the table below (with equivalent data for Cambridge and South Cambridgeshire in Appendix C).

Table 38: Estimated change in population with LTHPD, 2020-2041, Greater Cambridge

Scenario	Population with LTHPD, 2020	Population with LTHPD, 2041	Change	% Change
Standard Method	42,352	58,424	16,072	37.9%
Medium (2011 commuting)	42,352	59,633	17,281	40.8%
Medium (1:1 commuting)	42,352	60,143	17,792	42.0%
Maximum (2011 commuting)	42,352	62,771	20,419	48.2%
Maximum (1:1 commuting)	42,352	63,366	21,014	49.6%

Source: Derived from Demographic Modelling and Census 2011

6.13 Analysis then looked at the likely change to the number of people in different age groups with a range of disabilities. This linked to POPPI and PANSI data and across to the population projections.

6.14 The series of tables below show estimates of changes to the number of people with these disabilities across Greater Cambridge, with tables in Appendix C providing the same information for the two local authorities.

Table 39: Projected changes to population with a range of disabilities, Greater Cambridge, standard method

Disability	Age Range	2020	2041	Change	% Change
Mental Disabilities: Dementia	65+	3,454	5,845	2,391	69.2%
Mental Disabilities: Autistic Spectrum Disorders	18-64	1,985	2,362	377	19.0%
Mental Disabilities: Autistic Spectrum Disorders	65+	444	695	251	56.5%
Mental Disabilities: Learning Disabilities	15-64	5,007	5,942	935	18.7%
Mental Disabilities: Learning Disabilities	65+	986	1,490	504	51.1%
Mental Disabilities: Challenging behaviour	15-64	91	108	17	18.7%
Physical Disabilities: Mobility problems	65+	8,911	14,368	5,457	61.2%
Physical Disabilities: Impaired mobility	16-64	9,354	11,394	2,040	21.8%

Source: POPPI/PANSI and Demographic Projections

Table 40: Projected changes to population with a range of disabilities, Greater Cambridge, medium (2011 commuting)

Disability	Age Range	2020	2041	Change	% Change
Mental Disabilities: Dementia	65+	3,454	5,892	2,438	70.6%
Mental Disabilities: Autistic Spectrum Disorders	18-64	1,985	2,458	473	23.9%
Mental Disabilities: Autistic Spectrum Disorders	65+	444	702	258	58.0%
Mental Disabilities: Learning Disabilities	15-64	5,007	6,190	1,183	23.6%
Mental Disabilities: Learning Disabilities	65+	986	1,503	518	52.5%
Mental Disabilities: Challenging behaviour	15-64	91	113	22	23.6%
Physical Disabilities: Mobility problems	65+	8,911	14,487	5,577	62.6%
Physical Disabilities: Impaired mobility	16-64	9,354	11,753	2,399	25.7%

Source: POPPI/PANSI and Demographic Projections

Table 41: Projected changes to population with a range of disabilities, Greater Cambridge, medium (1:1 commuting)

Disability	Age Range	2020	2041	Change	% Change
Mental Disabilities: Dementia	65+	3,454	5,906	2,452	71.0%
Mental Disabilities: Autistic Spectrum Disorders	18-64	1,985	2,503	518	26.1%
Mental Disabilities: Autistic Spectrum Disorders	65+	444	704	260	58.5%
Mental Disabilities: Learning Disabilities	15-64	5,007	6,305	1,297	25.9%
Mental Disabilities: Learning Disabilities	65+	986	1,508	522	52.9%
Mental Disabilities: Challenging behaviour	15-64	91	115	24	25.9%
Physical Disabilities: Mobility problems	65+	8,911	14,522	5,611	63.0%
Physical Disabilities: Impaired mobility	16-64	9,354	11,910	2,556	27.3%

Source: POPPI/PANSI and Demographic Projections

Table 42: Projected changes to population with a range of disabilities, Greater Cambridge, maximum (2011 commuting)

Disability	Age Range	2020	2041	Change	% Change
Mental Disabilities: Dementia	65+	3,454	6,104	2,650	76.7%
Mental Disabilities: Autistic Spectrum Disorders	18-64	1,985	2,656	671	33.8%
Mental Disabilities: Autistic Spectrum Disorders	65+	444	729	285	64.1%
Mental Disabilities: Learning Disabilities	15-64	5,007	6,702	1,695	33.8%
Mental Disabilities: Learning Disabilities	65+	986	1,561	575	58.3%
Mental Disabilities: Challenging behaviour	15-64	91	122	31	33.9%
Physical Disabilities: Mobility problems	65+	8,911	15,010	6,100	68.5%
Physical Disabilities: Impaired mobility	16-64	9,354	12,618	3,264	34.9%

Source: POPPI/PANSI and Demographic Projections

Table 43: Projected changes to population with a range of disabilities, Greater Cambridge, maximum (1:1 commuting)

Disability	Age Range	2020	2041	Change	% Change
Mental Disabilities: Dementia	65+	3,454	6,113	2,659	77.0%
Mental Disabilities: Autistic Spectrum Disorders	18-64	1,985	2,712	727	36.6%
Mental Disabilities: Autistic Spectrum Disorders	65+	444	731	286	64.4%
Mental Disabilities: Learning Disabilities	15-64	5,007	6,845	1,838	36.7%
Mental Disabilities: Learning Disabilities	65+	986	1,564	578	58.6%
Mental Disabilities: Challenging behaviour	15-64	91	125	34	36.7%
Physical Disabilities: Mobility problems	65+	8,911	15,035	6,124	68.7%
Physical Disabilities: Impaired mobility	16-64	9,354	12,805	3,452	36.9%

Source: POPPI/PANSI and Demographic Projections

6.15 The final analysis on older people and people with disabilities was to estimate the likely need for homes which are adapted or adaptable for wheelchair users.

6.16 The analysis sets out prevalence rates based on national data with local adjustments linking to the relative health of the local population. The rates for each area were then overlaid onto the demographic projections to estimate current and future needs.

6.17 The table below shows overall wheelchair needs in the 2020-41 period for Greater Cambridge under the four scenarios and based on the standard method projections, with equivalent tables for Cambridge and South Cambridgeshire provided in Appendix C.

Table 44: Estimated need for wheelchair user homes, 2020-2041, Greater Cambridge

Scenario	Current need	Projected need (2020-41)	Total current and future need	Housing need (2020-41)	% of Housing Need
Standard Method	726	1,625	2,351	36,603	6.4%
Medium (2011 commuting)	726	1,699	2,425	41,915	5.8%
Medium (1:1 commuting)	726	1,730	2,456	44,322	5.5%
Maximum (2011 commuting)	726	1,908	2,634	53,519	4.9%
Maximum (1:1 commuting)	726	1,942	2,668	56,488	4.7%

Source: Derived from a range of sources

Implications for HNSG findings

Older people

6.18 The analysis has shown that, while the overall housing requirement number goes up, the number of older people doesn't go up in the same proportion. As a result, the impact of the demographic projections linked to the scenarios has a limited impact on the need for specialist housing for older people. The levels of need are similar in different scenarios (albeit older person needs as a proportion of overall need does fall as the housing requirement increases).

Disabled people and wheelchair users

6.19 Broadly the same conclusions can be arrived at for disabled people and wheelchair users as for older people given the strong link between older people and disability and wheelchair use. As a result, for all scenarios there is a need to increase the supply of homes that are suitable for a variety of residents. It is therefore still recommended that all new homes meet the M4(2) Building Regulations standard for accessible and adaptable homes, and that some new homes should meet the M4(3) Building Regulations standard for wheelchair user homes.

7. Student Accommodation

- 7.1 In this chapter the impact of the changes in demography associated with the four scenarios on the findings set out in chapter 9 of the HNSG (student accommodation) is examined. The findings are disaggregated to Cambridge and South Cambridgeshire.
- 7.2 This analysis identifies variations between these outputs and those set out in the HNSG and provides a commentary explaining why these variations have arisen.
- 7.3 Chapter 9 in the HNSG report considers the requirement for additional student accommodation over the period 2020-2041 to allow for the growth in the student body within Greater Cambridge.
- 7.4 This draws primarily on evidence provided by the University of Cambridge and the Cambridge Campus of Anglia Ruskin University. As a result, the different forecasts relating to demographic change examined in this report will not affect the findings presented in the HNSG report.
- 7.5 That said, chapter 9 does present a profile of student accommodation drawing on Census data. The data presented in the HNSG shows how different age groups break down into different choices of accommodation.
- 7.6 The age structure data relating to each of the scenarios allows forecasts to be made relating to the number of different types of accommodation that will be demanded based on how students of different age groups opted for different types of accommodation in 2011.
- 7.7 The tables below set out the change to the household types resulting from the demographic projections associated with each of the student household types for the Greater Cambridge area as a whole.

Table 45: Percentage change in the number of types of student household 2020-2041 (Standard Method)

Student accommodation	Age 16 to 19	Age 20 to 24	Age 25+
All Student accommodation	23.5%	21.7%	22.1%
Living with parents	25.2%	24.6%	24.6%
Living in a communal establishment: University (for example halls of residence)	21.4%	21.4%	21.3%
Living in a communal establishment: Other	21.5%	21.4%	22.9%
Living in all student household	21.6%	21.4%	21.9%
Student living alone	21.5%	21.6%	22.1%
Living in a one family household with spouse, partner or children	23.3%	22.5%	23.2%
Living in other household type	22.9%	21.9%	21.9%

Source: Demographic projections

Table 46: Percentage change in the number of types of student household 2020-41 (medium 2011 commuting)

Student accommodation	Age 16 to 19	Age 20 to 24	Age 25+
All Student accommodation	29.3%	29.5%	29.5%
Living with parents	29.1%	29.2%	29.2%
Living in a communal establishment: University (for example halls of residence)	29.6%	29.6%	29.6%
Living in a communal establishment: Other	29.5%	29.6%	29.4%
Living in all student household	29.5%	29.6%	29.5%
Student living alone	29.5%	29.5%	29.5%
Living in a one family household with spouse, partner or children	29.3%	29.4%	29.4%
Living in other household type	29.4%	29.5%	29.5%

Source: Demographic projections

Table 47: Percentage change in the number of types of student household 2020-41 (medium 1:1 commuting)

Student accommodation	Age 16 to 19	Age 20 to 24	Age 25+
All Student accommodation	32.3%	34.0%	33.6%
Living with parents	30.7%	31.3%	31.3%
Living in a communal establishment: University (for example halls of residence)	34.3%	34.3%	34.4%
Living in a communal establishment: Other	34.2%	34.3%	32.9%
Living in all student household	34.1%	34.3%	33.8%
Student living alone	34.2%	34.1%	33.6%
Living in a one family household with spouse, partner or children	32.4%	33.2%	32.6%
Living in other household type	32.8%	33.8%	33.8%

Source: Demographic projections

Table 48: Percentage change in the number of types of student household 2020-41 (maximum 2011 commuting)

Student accommodation	Age 16 to 19	Age 20 to 24	Age 25+
All Student accommodation	37.5%	34.1%	34.9%
Living with parents	40.5%	39.4%	39.5%
Living in a communal establishment: University (for example halls of residence)	33.7%	33.7%	33.4%
Living in a communal establishment: Other	33.9%	33.7%	36.4%
Living in all student household	34.0%	33.7%	34.5%
Student living alone	33.9%	34.1%	34.9%
Living in a one family household with spouse, partner or children	37.2%	35.7%	37.0%
Living in other household type	36.4%	34.5%	34.6%

Source: Demographic projections

Table 49: Percentage change in the number of types of student household 2020-41 (maximum 1:1 commuting)

Student accommodation	Age 16 to 19	Age 20 to 24	Age 25+
All Student accommodation	41.5%	40.6%	40.8%
Living with parents	42.3%	42.0%	42.0%
Living in a communal establishment: University (for example halls of residence)	40.4%	40.4%	40.4%
Living in a communal establishment: Other	40.5%	40.4%	41.2%
Living in all student household	40.5%	40.4%	40.7%
Student living alone	40.5%	40.6%	40.8%
Living in a one family household with spouse, partner or children	41.4%	41.0%	41.3%
Living in other household type	41.2%	40.7%	40.7%

Source: Demographic projections

7.8 The data suggests that, for Greater Cambridge, the demographic change associated with the medium 2011 and the maximum 1:1 commuting scenarios produce an uplift across all student dwelling types of around 30% and 40% respectively over the period 2020 to 2041. This is a significant uplift on the standard-method based scenario of around 22%.

7.9 In the case of Cambridge, the increase in types of student household range from around 21% for the Standard Method scenario to around 40% for the maximum 1:1 commuting scenario by 2041.

7.10 For South Cambridgeshire, the increase in types of student household range from around 27% for the Standard Method scenario to around 43% for the maximum 1:1 commuting scenario by 2041.

Implications for HNSG findings

7.11 The projections for future growth of purpose-built student accommodation presented in the HNSG report rely on the future growth plans of Anglia Ruskin University and the University of Cambridge. As a result, the different forecasts relating to demographic change examined in this report will not affect the findings presented in the HNSG report.

7.12 Analysis of the age structure data relating to each of the scenarios allows forecasts to be made relating to the types of accommodation that will be demanded by students based on how students of different age groups opted for different types of accommodation in 2011. The data suggests that there will be potentially significant consequences with regards to the type of accommodation that will be demanded by students in future years.

8. Housing Needs of Other Groups

- 8.1 In this chapter the impact of the changes in demography associated with the four scenarios on the findings set out in chapter 10 of the HNSG (housing needs of other groups) is examined. These are:
- People who rent their homes
 - Self-build and custom-build housing
 - Service personnel and families
- 8.2 Demand associated with demographic projections based on the standard method are also provided for comparison. The findings are disaggregated to Cambridge and South Cambridge.
- 8.3 This analysis identifies variations between these outputs and those set out in the HNSG and provides a commentary explaining why these variations have arisen.

People who rent their homes

- 8.4 The HNSG report does not attempt to estimate the need for additional private rented housing as it sets out that whether people buy or rent their homes is dependent on several factors that can fluctuate over time such as mortgage lending practices, availability of housing related benefit, and existing types and tenures of homes available in the area. The HNSG report however, does look into the demand profile for build to rent (BTR) development and it was found that around 62% of residents of BTR schemes were aged between 25 and 34 compared with 47% in the wider private rented sector (PRS) market. The remaining residents included 17% aged between 16 and 24, and 13% aged 35-44. This suggests that the majority of residents in BTR are aged between 16 and 44.
- 8.5 The tables below set out how this age group (the 15-44 age group is used as a close proxy for 16-44 because the population projections set out in the HNSG are

set out in five-year age bands) is forecast to grow based on the demographic change associated with each of the four scenarios.

Table 50: Projected Population Growth in those aged 15-44 in Cambridge (all scenarios)

Scenario	Population 2020	Population 2041	Change	% Change
Standard Method	74,843	81,350	6,507	8.7%
Medium (2011 commuting)	74,843	88,276	13,433	17.9%
Medium (1:1 commuting)	74,843	92,315	17,472	23.3%
Maximum (2011 commuting)	74,843	91,335	16,492	22.0%
Maximum (1:1 commuting)	74,843	97,155	22,312	29.8%

Source: demographic projections

Table 51: Projected Population Growth in those aged 15-44 in South Cambridgeshire (all scenarios)

Scenario	Population 2020	Population 2041	Change	% Change
Standard Method	56,995	70,336	13,341	23.4%
Medium (2011 commuting)	56,995	71,455	14,460	25.4%
Medium (1:1 commuting)	56,995	71,254	14,259	25.0%
Maximum (2011 commuting)	56,995	83,374	26,379	46.3%
Maximum (1:1 commuting)	56,995	82,469	25,474	44.7%

Source: demographic projections

Table 52: Projected Population Growth in those aged 15-44 in Greater Cambridge (all scenarios)

Scenario	Population 2020	Population 2041	Change	% Change
Standard Method	131,838	151,686	19,848	15.1%
Medium (2011 commuting)	131,838	159,731	27,893	21.2%
Medium (1:1 commuting)	131,838	163,569	31,731	24.1%
Maximum (2011 commuting)	131,838	174,709	42,871	32.5%
Maximum (1:1 commuting)	131,838	179,624	47,786	36.2%

Source: demographic projections

Self and custom build housing and service personnel

- 8.6 The assessment of demand for self-build and custom-build housing and the needs of service personnel and families do not draw on the demographic projections to provide an assessment of need. The scenarios examined in this report will therefore have no impact on demand for housing from these groups.

Implications for HNSG findings

- 8.7 While the demographic projections associated with the scenarios will not have an impact on the demand for self-build and custom-build housing and the needs of service personnel, demand for BTR development will be affected.
- 8.8 The HNSG report did not estimate the need for additional private rented housing but it does look into the demand profile for BTR developments. It found that the majority of residents of BTR schemes were aged between 16 and 44. The demographic projections show that for all scenarios there will be growth in these ages, with the higher growth scenarios showing higher percentage increases in these ages due to the assumptions that more growth will result in more in-migration of working age population.
- 8.9 The HNSG report notes, firstly, that demand for BTR development is likely to focus on urban areas (with the result that Cambridge and its immediately surrounding towns and villages in South Cambridgeshire are likely to be the most suitable locations for such development); secondly, the policy stance should be supportive of BTR across the whole Greater Cambridge geography; and, thirdly, the scale of demand should be monitored so as to ensure the interpretation of policy at the application stage reflects market evidence. The data presented in this report reinforces, but does not change, these recommendations.

9. Conclusions

9.1 This section identifies any change in the findings of the HNSG report that would arise in the event the demographic projections associated with any of the scenarios were used as the basis for understanding need and/or demand under each of the topics addressed in this report.

Revised demographic projections

9.2 For Greater Cambridge, the Standard Method projects a 24.5% increase in population while the maximum scenario (with a 1:1 commuting assumption) forecasts an increase at around 42%.

9.3 The revised age structure shows that, for virtually all scenarios, the population aged 65+ is projected to see the highest proportionate increase. However, it is also notable that the higher the projection, the higher the increase in the 16-64 and under 16 age group relative to those aged 65+.

9.4 This is because in the modelling an increase in migration is assumed. Migration tends to focus on people of working age (and the children they have).

Affordable housing need

9.5 The impact of the analysis on affordable housing need shows that net need for affordable rented tenures will increase substantially within all scenarios compared with that put forward under the Standard Method. The ranges are set out below:

- Cambridge: 450dpa associated with the Standard Method to 577dpa associated with the 1:1 maximum commuting.
- South Cambridgeshire: 579dpa associated with the Standard Method to 668dpa associated with the 1:1 maximum commuting.
- Greater Cambridge as a whole: 1,029dpa associated with the Standard Method to 1,246dpa associated with the 1:1 maximum commuting.

9.6 The report also considers the impact on need for affordable home ownership. The ranges are set out below:

- Cambridge: 289dpa associated with the Standard Method to 378dpa associated with the 1:1 maximum commuting.
- South Cambridgeshire: 195dpa associated with the Standard Method to 252dpa associated with the 1:1 maximum commuting.
- Greater Cambridge as a whole: 484dpa associated with the Standard Method to 630dpa associated with the 1:1 maximum commuting.

9.7 That said, while the analysis above shows higher estimates of affordable housing need than the HNSG report it is not considered that this leads to any different conclusions – mainly that the authorities should seek to maximise delivery of affordable housing when opportunities arise.

9.8 It is also important to note that the finding of a higher need does not have any impact on overall housing requirements. This is in part because the higher needs are linked to higher levels of delivery, but also due to the complex link between affordable need and overall need (affordable need is not just about the delivery of new housing, with many of those in need already living in self-contained accommodation).

Housing mix

9.9 The analysis relating to housing mix shows that, as the housing number increases, the relative proportion of households with dependent children also increases. That said, increases in older age groups are still proportionately higher than for those aged under 65.

9.10 As with households with dependent children, as the housing number increases the relative proportion of households headed by a younger person also increases.

9.11 The modelled mix emerging for each geography shows very little difference in housing mix outputs for the different scenarios.

9.12 The scenarios that foresee higher housing delivery show a need for more larger homes, but differences are minor. This suggests that the conclusions in the HNSG remain sound when applied to different levels of housing delivery.

Older and disabled persons

Older persons' housing

9.13 The analysis has shown that, while the overall housing requirement number goes up, the number of older people doesn't go up in the same proportion.

9.14 Also, the levels of need are similar in different scenarios (albeit older person needs as a proportion of overall need does fall as the housing requirement increases).

9.15 As a result, the impact of the demographic projections linked to the scenarios has a limited impact on the need for specialist housing for older people set out in the HNSG report.

Disabled people and wheelchair users

9.16 For all scenarios there is a need to increase the supply of homes that are suitable for a variety of residents. It is still recommended that all new homes meet the M4(2) Building Regulations standard for accessible and adaptable homes, and that some new homes should meet the M4(3) Building Regulations standard for wheelchair user homes.

Student accommodation

9.17 The projections for future growth of purpose-built student accommodation presented in the HNSG report rely on the future growth plans of Anglia Ruskin University and the University of Cambridge. As a result, the different forecasts relating to demographic change examined in this report will not affect the findings presented in the HNSG report.

9.18 Analysis of the age structure data relating to each of the scenarios allows forecasts to be made relating to the types of accommodation that will be

demanded by students based on how students of different age groups opted for different types of accommodation in 2011.

9.19 The data suggests that there will be potentially significant consequences with regards to the type of accommodation that will be demanded by students in future years.

Housing Needs of Other Groups

9.20 The assessment of demand for self-build and custom-build housing and the needs of service personnel and families do not draw on the demographic projections to provide an assessment of need. The demographic projections associated with the different scenarios examined in this report will therefore have no impact on demand for housing from these groups.

9.21 The HNSG report also does not attempt to estimate the need for additional private rented housing as it sets out that whether people buy or rent their homes is dependent on several factors that can fluctuate over time such as mortgage lending practices, availability of housing related benefit, and existing types and tenures of homes available in the area. The HNSG report however, does look into the demand profile for build to rent (BTR) development. This review found that the majority of residents in BTR are aged between 15 and 44. The report then draws on the demographic projections to discuss the implications this has for demand for BTR over the plan period.

9.22 It is therefore possible to apply the revised demographic projections associated with each of the four scenarios to this dataset to understand the possible change in demand for BTR within each.

9.23 Across all geographies the change to the level of growth with the 15-44 age group is substantial.

- In Cambridge the uplift is between 9% for the standard method and around 30% for the maximum (1:1 commuting) scenario.

- In South Cambridgeshire the uplift is between 23% for the standard method and around 45% for the maximum (1:1 commuting) scenario.
- For Greater Cambridge as a whole, the uplift is between 15% for the standard method and 36% for the maximum (1:1 commuting) scenario.

9.24 The HNSG report notes, firstly, that demand for BTR development is likely to focus on urban areas (with the result that Cambridge and its immediately surrounding towns and villages in South Cambridgeshire are likely to be the most suitable locations for such development); secondly, the policy stance should be supportive of BTR across the whole Greater Cambridge geography; and, thirdly, the scale of demand should be monitored so as to ensure the interpretation of policy at the application stage reflects market evidence. The data presented in this report reinforces, but does not change, these recommendations.

APPENDIX A: Additional population change data

Table 53: Population change 2020 – 2041 by five year age bands, Cambridge (standard method)

Age	2020	2041	Change	% change
Under 5	7,151	8,368	1,217	17.0%
5-9	7,011	8,565	1,554	22.2%
10-14	6,728	9,196	2,468	36.7%
15-19	9,977	14,293	4,316	43.3%
20-24	20,625	24,452	3,826	18.6%
25-29	14,956	15,137	181	1.2%
30-34	11,341	10,926	-415	-3.7%
35-39	9,473	8,365	-1,107	-11.7%
40-44	8,471	8,177	-295	-3.5%
45-49	7,602	9,383	1,781	23.4%
50-54	7,198	9,900	2,702	37.5%
55-59	6,479	8,851	2,371	36.6%
60-64	5,292	7,697	2,405	45.4%
65-69	4,539	6,252	1,714	37.8%
70-74	3,942	5,621	1,679	42.6%
75-79	3,003	4,869	1,866	62.1%
80-84	2,322	3,629	1,307	56.3%
85+	2,786	4,637	1,851	66.5%
Total	138,896	168,319	29,423	21.2%

Source: Demographic projections

Table 54: Population change 2020 – 2041 by five year age bands, Cambridge (medium, 2011 commuting)

Age	2020	2041	Change	% change
Under 5	7,151	9,667	2,516	35.2%
5-9	7,011	9,531	2,520	35.9%
10-14	6,728	9,769	3,041	45.2%
15-19	9,977	14,644	4,666	46.8%
20-24	20,625	25,287	4,662	22.6%
25-29	14,956	16,535	1,579	10.6%
30-34	11,341	12,544	1,203	10.6%
35-39	9,473	9,935	463	4.9%
40-44	8,471	9,331	859	10.1%
45-49	7,602	10,048	2,446	32.2%
50-54	7,198	10,296	3,097	43.0%
55-59	6,479	9,100	2,621	40.4%
60-64	5,292	7,873	2,580	48.8%
65-69	4,539	6,381	1,843	40.6%
70-74	3,942	5,725	1,783	45.2%
75-79	3,003	4,944	1,942	64.7%
80-84	2,322	3,676	1,355	58.4%
85+	2,786	4,695	1,909	68.5%
Total	138,896	179,981	41,085	29.6%

Source: Demographic projections

Table 55: Population change 2020-2041 by five year age bands, Cambridge (medium, 1:1 commuting)

Age	2020	2041	Change	% change
Under 5	7,151	10,424	3,273	45.8%
5-9	7,011	10,095	3,084	44.0%
10-14	6,728	10,103	3,376	50.2%
15-19	9,977	14,848	4,871	48.8%
20-24	20,625	25,774	5,149	25.0%
25-29	14,956	17,350	2,394	16.0%
30-34	11,341	13,488	2,147	18.9%
35-39	9,473	10,851	1,378	14.5%
40-44	8,471	10,004	1,533	18.1%
45-49	7,602	10,435	2,834	37.3%
50-54	7,198	10,526	3,328	46.2%
55-59	6,479	9,245	2,766	42.7%
60-64	5,292	7,975	2,683	50.7%
65-69	4,539	6,457	1,918	42.3%
70-74	3,942	5,786	1,844	46.8%
75-79	3,003	4,989	1,986	66.1%
80-84	2,322	3,704	1,382	59.5%
85+	2,786	4,729	1,943	69.8%
Total	138,896	186,783	47,887	34.5%

Source: Demographic projections

Table 56: Population change 2020-2041 by five year age bands, Cambridge (maximum, 2011 commuting)

Age	2020	2041	Change	% change
Under 5	7,151	10,240	3,089	43.2%
5-9	7,011	9,958	2,947	42.0%
10-14	6,728	10,022	3,295	49.0%
15-19	9,977	14,799	4,821	48.3%
20-24	20,625	25,656	5,031	24.4%
25-29	14,956	17,152	2,196	14.7%
30-34	11,341	13,259	1,918	16.9%
35-39	9,473	10,628	1,156	12.2%
40-44	8,471	9,841	1,369	16.2%
45-49	7,602	10,341	2,739	36.0%
50-54	7,198	10,470	3,272	45.5%
55-59	6,479	9,210	2,731	42.1%
60-64	5,292	7,950	2,658	50.2%
65-69	4,539	6,438	1,900	41.9%
70-74	3,942	5,771	1,829	46.4%
75-79	3,003	4,978	1,975	65.8%
80-84	2,322	3,697	1,376	59.3%
85+	2,786	4,721	1,935	69.5%
Total	138,896	185,131	46,235	33.3%

Source: Demographic projections

Table 57: Population change 2020-2041 by five year age bands, Cambridge (maximum, 1:1 commuting)

Age	2020	2041	Change	% change
Under 5	7,151	11,332	4,180	58.5%
5-9	7,011	10,770	3,759	53.6%
10-14	6,728	10,504	3,777	56.1%
15-19	9,977	15,093	5,116	51.3%
20-24	20,625	26,358	5,733	27.8%
25-29	14,956	18,326	3,370	22.5%
30-34	11,341	14,619	3,278	28.9%
35-39	9,473	11,948	2,475	26.1%
40-44	8,471	10,811	2,339	27.6%
45-49	7,602	10,900	3,298	43.4%
50-54	7,198	10,803	3,605	50.1%
55-59	6,479	9,419	2,940	45.4%
60-64	5,292	8,097	2,805	53.0%
65-69	4,539	6,547	2,008	44.2%
70-74	3,942	5,858	1,916	48.6%
75-79	3,003	5,042	2,039	67.9%
80-84	2,322	3,737	1,416	61.0%
85+	2,786	4,770	1,984	71.2%
Total	138,896	194,933	56,037	40.3%

Source: Demographic projections

Table 58: Population change 2020-2041 by five year age bands, South Cambridgeshire (standard method)

Age	2020	2041	Change	% change
Under 5	9,148	11,872	2,724	29.8%
5-9	10,415	12,196	1,781	17.1%
10-14	10,614	12,162	1,547	14.6%
15-19	9,176	11,105	1,930	21.0%
20-24	6,855	8,532	1,677	24.5%
25-29	8,281	11,138	2,857	34.5%
30-34	9,820	12,625	2,805	28.6%
35-39	10,919	12,960	2,040	18.7%
40-44	11,944	13,976	2,032	17.0%
45-49	12,258	14,316	2,057	16.8%
50-54	11,735	13,898	2,163	18.4%
55-59	10,953	12,808	1,855	16.9%
60-64	9,383	12,118	2,736	29.2%
65-69	8,110	11,129	3,018	37.2%
70-74	8,190	10,697	2,507	30.6%
75-79	5,937	9,477	3,540	59.6%
80-84	4,290	7,279	2,989	69.7%
85+	4,329	8,588	4,259	98.4%
Total	162,357	206,876	44,520	27.4%

Source: Demographic projections

Table 59: Population change 2020-2041 by five year age bands, South Cambridgeshire (medium, 2011 commuting)

Age	2020	2041	Change	% change
Under 5	9,148	12,083	2,935	32.1%
5-9	10,415	12,379	1,964	18.9%
10-14	10,614	12,303	1,689	15.9%
15-19	9,176	11,211	2,035	22.2%
20-24	6,855	8,670	1,815	26.5%
25-29	8,281	11,335	3,055	36.9%
30-34	9,820	12,859	3,039	30.9%
35-39	10,919	13,195	2,275	20.8%
40-44	11,944	14,185	2,241	18.8%
45-49	12,258	14,484	2,226	18.2%
50-54	11,735	14,029	2,294	19.6%
55-59	10,953	12,908	1,955	17.8%
60-64	9,383	12,200	2,817	30.0%
65-69	8,110	11,196	3,086	38.0%
70-74	8,190	10,755	2,565	31.3%
75-79	5,937	9,523	3,586	60.4%
80-84	4,290	7,310	3,020	70.4%
85+	4,329	8,628	4,299	99.3%
Total	162,357	209,253	46,896	28.9%

Source: Demographic projections

Table 60: Population change 2020-2041 by five year age bands, South Cambridgeshire (medium, 1:1 commuting)

Age	2020	2041	Change	% change
Under 5	9,148	12,045	2,897	31.7%
5-9	10,415	12,346	1,931	18.5%
10-14	10,614	12,278	1,664	15.7%
15-19	9,176	11,192	2,016	22.0%
20-24	6,855	8,645	1,790	26.1%
25-29	8,281	11,300	3,019	36.5%
30-34	9,820	12,817	2,997	30.5%
35-39	10,919	13,153	2,233	20.5%
40-44	11,944	14,147	2,203	18.4%
45-49	12,258	14,454	2,196	17.9%
50-54	11,735	14,006	2,271	19.4%
55-59	10,953	12,890	1,937	17.7%
60-64	9,383	12,185	2,803	29.9%
65-69	8,110	11,184	3,073	37.9%
70-74	8,190	10,744	2,554	31.2%
75-79	5,937	9,515	3,578	60.3%
80-84	4,290	7,304	3,015	70.3%
85+	4,329	8,621	4,292	99.1%
Total	162,357	208,826	46,469	28.6%

Source: Demographic projections

Table 61: Population change 2020-2041 by five year age bands, South Cambridgeshire (maximum, 2011 commuting)

Age	2020	2041	Change	% change
Under 5	9,148	14,335	5,187	56.7%
5-9	10,415	14,334	3,920	37.6%
10-14	10,614	13,813	3,199	30.1%
15-19	9,176	12,333	3,158	34.4%
20-24	6,855	10,136	3,282	47.9%
25-29	8,281	13,438	5,157	62.3%
30-34	9,820	15,358	5,538	56.4%
35-39	10,919	15,702	4,783	43.8%
40-44	11,944	16,407	4,463	37.4%
45-49	12,258	16,286	4,028	32.9%
50-54	11,735	15,432	3,697	31.5%
55-59	10,953	13,973	3,020	27.6%
60-64	9,383	13,068	3,685	39.3%
65-69	8,110	11,911	3,801	46.9%
70-74	8,190	11,376	3,186	38.9%
75-79	5,937	10,008	4,072	68.6%
80-84	4,290	7,636	3,347	78.0%
85+	4,329	9,059	4,730	109.3%
Total	162,357	234,609	72,252	44.5%

Source: Demographic projections

Table 62: Population change 2020-2041 by five year age bands, South Cambridgeshire (maximum, 1:1 commuting)

Age	2020	2041	Change	% change
Under 5	9,148	14,164	5,016	54.8%
5-9	10,415	14,186	3,771	36.2%
10-14	10,614	13,698	3,084	29.1%
15-19	9,176	12,248	3,072	33.5%
20-24	6,855	10,025	3,170	46.2%
25-29	8,281	13,278	4,997	60.3%
30-34	9,820	15,168	5,348	54.5%
35-39	10,919	15,512	4,592	42.1%
40-44	11,944	16,238	4,294	36.0%
45-49	12,258	16,149	3,891	31.7%
50-54	11,735	15,326	3,591	30.6%
55-59	10,953	13,892	2,939	26.8%
60-64	9,383	13,002	3,619	38.6%
65-69	8,110	11,857	3,747	46.2%
70-74	8,190	11,329	3,139	38.3%
75-79	5,937	9,971	4,035	68.0%
80-84	4,290	7,612	3,322	77.4%
85+	4,329	9,026	4,697	108.5%
Total	162,357	232,680	70,324	43.3%

Source: Demographic projections

Table 63: Population change 2020-2041 by five year age bands, Greater Cambridge (standard method)

Age	2020	2041	Change	% change
Under 5	16,299	20,240	3,941	46.8%
5-9	17,426	20,761	3,336	39.3%
10-14	17,342	21,357	4,015	51.3%
15-19	19,153	25,399	6,246	64.3%
20-24	27,480	32,984	5,504	43.0%
25-29	23,237	26,276	3,039	35.7%
30-34	21,161	23,551	2,390	24.9%
35-39	20,392	21,325	933	7.0%
40-44	20,415	22,153	1,738	13.5%
45-49	19,860	23,698	3,838	40.2%
50-54	18,933	23,798	4,865	56.0%
55-59	17,433	21,659	4,227	53.5%
60-64	14,675	19,816	5,141	74.6%
65-69	12,649	17,381	4,732	75.0%
70-74	12,132	16,318	4,186	73.2%
75-79	8,939	14,346	5,406	121.8%
80-84	6,611	10,908	4,297	126.0%
85+	7,115	13,225	6,110	164.8%
Total	301,253	375,195	73,943	48.6%

Source: Demographic projections

Table 64: Population change 2020-2041 by five year age bands, greater Cambridge (medium, 2011 commuting)

Age	2020	2041	Change	% change
Under 5	16,299	21,750	5,451	67.3%
5-9	17,426	21,910	4,485	54.8%
10-14	17,342	22,072	4,730	61.1%
15-19	19,153	25,854	6,701	68.9%
20-24	27,480	33,957	6,477	49.1%
25-29	23,237	27,870	4,633	47.4%
30-34	21,161	25,403	4,242	41.6%
35-39	20,392	23,130	2,738	25.7%
40-44	20,415	23,516	3,100	28.9%
45-49	19,860	24,532	4,672	50.3%
50-54	18,933	24,325	5,392	62.6%
55-59	17,433	22,008	4,576	58.3%
60-64	14,675	20,072	5,398	78.8%
65-69	12,649	17,577	4,928	78.6%
70-74	12,132	16,480	4,348	76.6%
75-79	8,939	14,467	5,528	125.1%
80-84	6,611	10,986	4,375	128.8%
85+	7,115	13,324	6,209	167.8%
Total	301,253	389,234	87,982	58.5%

Source: Demographic projections

Table 65: Population change 2020-2041 by five year age bands, greater Cambridge (medium, 1:1 commuting)

Age	2020	2041	Change	% change
Under 5	16,299	22,469	6,170	77.4%
5-9	17,426	22,441	5,015	62.5%
10-14	17,342	22,381	5,039	65.9%
15-19	19,153	26,040	6,887	70.8%
20-24	27,480	34,419	6,939	51.1%
25-29	23,237	28,650	5,413	52.5%
30-34	21,161	26,305	5,144	49.4%
35-39	20,392	24,003	3,611	35.0%
40-44	20,415	24,151	3,736	36.5%
45-49	19,860	24,889	5,029	55.2%
50-54	18,933	24,532	5,599	65.6%
55-59	17,433	22,136	4,703	60.4%
60-64	14,675	20,160	5,485	80.6%
65-69	12,649	17,640	4,991	80.1%
70-74	12,132	16,530	4,398	78.0%
75-79	8,939	14,503	5,564	126.4%
80-84	6,611	11,008	4,397	129.8%
85+	7,115	13,350	6,235	168.9%
Total	301,253	395,609	94,356	63.1%

Source: Demographic projections

Table 66: Population change 2020-2041 by five year age bands, Greater Cambridge (maximum, 2011 commuting)

Age	2020	2041	Change	% change
Under 5	16,299	24,575	8,276	99.9%
5-9	17,426	24,292	6,867	79.7%
10-14	17,342	23,836	6,494	79.1%
15-19	19,153	27,132	7,979	82.7%
20-24	27,480	35,792	8,312	72.3%
25-29	23,237	30,590	7,353	77.0%
30-34	21,161	28,617	7,456	73.3%
35-39	20,392	26,331	5,939	56.0%
40-44	20,415	26,247	5,832	53.5%
45-49	19,860	26,627	6,767	68.9%
50-54	18,933	25,902	6,969	77.0%
55-59	17,433	23,183	5,751	69.7%
60-64	14,675	21,018	6,343	89.5%
65-69	12,649	18,350	5,701	88.7%
70-74	12,132	17,147	5,015	85.3%
75-79	8,939	14,986	6,047	134.4%
80-84	6,611	11,334	4,722	137.3%
85+	7,115	13,780	6,665	178.7%
Total	301,253	419,740	118,488	77.8%

Source: Demographic projections

Table 67: Population change 2020-2041 by five year age bands, Greater Cambridge (maximum, 1:1 commuting)

Age	2020	2041	Change	% change
Under 5	16,299	25,495	9,196	113.3%
5-9	17,426	24,955	7,530	89.8%
10-14	17,342	24,203	6,861	85.2%
15-19	19,153	27,341	8,188	84.8%
20-24	27,480	36,383	8,903	74.0%
25-29	23,237	31,604	8,367	82.9%
30-34	21,161	29,787	8,626	83.4%
35-39	20,392	27,459	7,068	68.2%
40-44	20,415	27,048	6,633	63.6%
45-49	19,860	27,049	7,189	75.1%
50-54	18,933	26,128	7,195	80.7%
55-59	17,433	23,312	5,879	72.2%
60-64	14,675	21,099	6,424	91.6%
65-69	12,649	18,404	5,755	90.4%
70-74	12,132	17,187	5,055	86.9%
75-79	8,939	15,013	6,074	135.9%
80-84	6,611	11,349	4,737	138.4%
85+	7,115	13,796	6,681	179.7%
Total	301,253	427,613	126,361	83.7%

Source: Demographic projections

APPENDIX B: Additional housing mix tables

Table 68: Projected change in household types in Cambridge, 2020-2041 (standard method)

Household Type	2020	2041	Change in households	% Change
One-person household (aged 65 and over)	5,957	8,382	2,425	40.7%
One-person household (aged under 65)	11,095	12,918	1,823	16.4%
Couple (aged 65 and over)	4,117	6,534	2,417	58.7%
Couple (aged under 65)	7,531	7,341	-191	-2.5%
A couple and one or more other adults: No dependent children	3,623	5,652	2,029	56.0%
Households with one dependent child	6,405	7,803	1,397	21.8%
Households with two dependent children	5,060	5,828	768	15.2%
Households with three dependent children	2,028	2,072	44	2.2%
Other households	6,698	9,401	2,703	40.4%
Total	52,515	65,931	13,416	25.5%
Total households with dependent children	13,493	15,703	2,210	16.4%

Source: Demographic Projections based on ONS Data

Table 69: Projected change in household types in Cambridge, 2020-2041 (medium, 2011 commuting)

Household Type	2020	2041	Change in households	% Change
One-person household (aged 65 and over)	5,957	8,526	2,569	43.1%
One-person household (aged under 65)	11,095	13,880	2,785	25.1%
Couple (aged 65 and over)	4,117	6,639	2,522	61.3%
Couple (aged under 65)	7,531	8,103	572	7.6%
A couple and one or more other adults: No dependent children	3,623	5,904	2,281	63.0%
Households with one dependent child	6,405	8,516	2,111	33.0%
Households with two dependent children	5,060	6,319	1,259	24.9%
Households with three dependent children	2,028	2,253	225	11.1%
Other households	6,698	10,068	3,370	50.3%
Total	52,515	70,209	17,694	33.7%
Total households with dependent children	13,493	17,088	3,595	26.6%

Source: Demographic Projections based on ONS Data

Table 70: Projected change in household types in Cambridge, 2020-2041 (medium, 1:1 commuting)

Household Type	2020	2041	Change in households	% Change
One-person household (aged 65 and over)	5,957	8,610	2,653	44.5%
One-person household (aged under 65)	11,095	14,441	3,346	30.2%
Couple (aged 65 and over)	4,117	6,700	2,583	62.7%
Couple (aged under 65)	7,531	8,548	1,016	13.5%
A couple and one or more other adults: No dependent children	3,623	6,051	2,428	67.0%
Households with one dependent child	6,405	8,932	2,527	39.5%
Households with two dependent children	5,060	6,606	1,546	30.5%
Households with three dependent children	2,028	2,358	330	16.3%
Other households	6,698	10,457	3,759	56.1%
Total	52,515	72,704	20,189	38.4%
Total households with dependent children	13,493	17,896	4,403	32.6%

Source: Demographic Projections based on ONS Data

Table 71: Projected change in household types in Cambridge, 2020-2041 (maximum, 2011 commuting)

Household Type	2020	2041	Change in households	% Change
One-person household (aged 65 and over)	5,957	8,590	2,633	44.2%
One-person household (aged under 65)	11,095	14,305	3,210	28.9%
Couple (aged 65 and over)	4,117	6,685	2,568	62.4%
Couple (aged under 65)	7,531	8,440	908	12.1%
A couple and one or more other adults: No dependent children	3,623	6,015	2,392	66.0%
Households with one dependent child	6,405	8,831	2,426	37.9%
Households with two dependent children	5,060	6,536	1,476	29.2%
Households with three dependent children	2,028	2,332	305	15.0%
Other households	6,698	10,362	3,664	54.7%
Total	52,515	72,098	19,583	37.3%
Total households with dependent children	13,493	17,700	4,207	31.2%

Source: Demographic Projections based on ONS Data

Table 72: Projected change in household types in Cambridge, 2020-2041 (maximum, 1:1 commuting)

Household Type	2020	2041	Change in households	% Change
One-person household (aged 65 and over)	5,957	8,711	2,754	46.2%
One-person household (aged under 65)	11,095	15,114	4,019	36.2%
Couple (aged 65 and over)	4,117	6,773	2,656	64.5%
Couple (aged under 65)	7,531	9,081	1,549	20.6%
A couple and one or more other adults: No dependent children	3,623	6,227	2,604	71.9%
Households with one dependent child	6,405	9,431	3,026	47.2%
Households with two dependent children	5,060	6,949	1,889	37.3%
Households with three dependent children	2,028	2,484	456	22.5%
Other households	6,698	10,923	4,225	63.1%
Total	52,515	75,694	23,179	44.1%
Total households with dependent children	13,493	18,864	5,371	39.8%

Source: Demographic Projections based on ONS Data

Table 73: Projected change in household types in South Cambridgeshire, 2020-2041 (standard method)

Household Type	2020	2041	Change in households	% Change
One-person household (aged 65 and over)	8,152	11,439	3,288	40.3%
One-person household (aged under 65)	8,284	10,896	2,611	31.5%
Couple (aged 65 and over)	10,213	17,237	7,024	68.8%
Couple (aged under 65)	10,542	10,035	-507	-4.8%
A couple and one or more other adults: No dependent children	5,083	6,984	1,901	37.4%
Households with one dependent child	8,543	11,733	3,190	37.3%
Households with two dependent children	9,173	11,429	2,255	24.6%
Households with three dependent children	3,054	3,394	340	11.1%
Other households	3,470	5,485	2,016	58.1%
Total	66,514	88,632	22,118	33.3%
Total households with dependent children	20,770	26,555	5,785	27.9%

Source: Demographic Projections based on ONS Data

Table 74: Projected change in household types in South Cambridgeshire, 2020-2041 (medium, 2011 commuting)

Household Type	2020	2041	Change in households	% Change
One-person household (aged 65 and over)	8,152	11,502	3,350	41.1%
One-person household (aged under 65)	8,284	11,023	2,739	33.1%
Couple (aged 65 and over)	10,213	17,327	7,114	69.7%
Couple (aged under 65)	10,542	10,162	-380	-3.6%
A couple and one or more other adults: No dependent children	5,083	7,044	1,961	38.6%
Households with one dependent child	8,543	11,894	3,352	39.2%
Households with two dependent children	9,173	11,582	2,409	26.3%
Households with three dependent children	3,054	3,440	386	12.6%
Other households	3,470	5,539	2,070	59.7%
Total	66,514	89,514	23,000	34.6%
Total households with dependent children	20,770	26,916	6,146	29.6%

Source: Demographic Projections based on ONS Data

Table 75: Projected change in household types in South Cambridgeshire, 2020-2041 (medium, 1:1 commuting)

Household Type	2020	2041	Change in households	% Change
One-person household (aged 65 and over)	8,152	11,491	3,339	41.0%
One-person household (aged under 65)	8,284	11,000	2,716	32.8%
Couple (aged 65 and over)	10,213	17,311	7,098	69.5%
Couple (aged under 65)	10,542	10,139	-403	-3.8%
A couple and one or more other adults: No dependent children	5,083	7,034	1,950	38.4%
Households with one dependent child	8,543	11,865	3,323	38.9%
Households with two dependent children	9,173	11,555	2,381	26.0%
Households with three dependent children	3,054	3,431	377	12.4%
Other households	3,470	5,530	2,060	59.4%
Total	66,514	89,356	22,842	34.3%
Total households with dependent children	20,770	26,851	6,081	29.3%

Source: Demographic Projections based on ONS Data

Table 76: Projected change in household types in South Cambridgeshire, 2020-2041 (maximum, 2011 commuting)

Household Type	2020	2041	Change in households	% Change
One-person household (aged 65 and over)	8,152	12,165	4,013	49.2%
One-person household (aged under 65)	8,284	12,381	4,097	49.5%
Couple (aged 65 and over)	10,213	18,286	8,073	79.0%
Couple (aged under 65)	10,542	11,506	964	9.1%
A couple and one or more other adults: No dependent children	5,083	7,682	2,599	51.1%
Households with one dependent child	8,543	13,612	5,070	59.3%
Households with two dependent children	9,173	13,215	4,042	44.1%
Households with three dependent children	3,054	3,929	875	28.7%
Other households	3,470	6,115	2,646	76.3%
Total	66,514	98,892	32,378	48.7%
Total households with dependent children	20,770	30,757	9,986	48.1%

Source: Demographic Projections based on ONS Data

Table 77: Projected change in household types in South Cambridgeshire, 2020-2041 (maximum, 1:1 commuting)

Household Type	2020	2041	Change in households	% Change
One-person household (aged 65 and over)	8,152	12,115	3,963	48.6%
One-person household (aged under 65)	8,284	12,278	3,993	48.2%
Couple (aged 65 and over)	10,213	18,213	8,000	78.3%
Couple (aged under 65)	10,542	11,404	862	8.2%
A couple and one or more other adults: No dependent children	5,083	7,633	2,550	50.2%
Households with one dependent child	8,543	13,482	4,939	57.8%
Households with two dependent children	9,173	13,091	3,917	42.7%
Households with three dependent children	3,054	3,892	838	27.4%
Other households	3,470	6,071	2,602	75.0%
Total	66,514	98,178	31,664	47.6%
Total households with dependent children	20,770	30,464	9,694	46.7%

Source: Demographic Projections based on ONS Data

Table 78: Projected change in households by age of household reference person in Cambridge, 2020-2041 (standard method)

Age	2020	2041	Change in households	% Change
16-24	2,787	3,504	717	25.7%
25-29	4,895	4,975	81	1.7%
30-34	5,598	5,029	-569	-10.2%
35-39	5,245	4,814	-431	-8.2%
40-44	4,902	4,998	96	2.0%
45-49	4,513	5,637	1,123	24.9%
50-54	4,758	6,707	1,949	41.0%
55-59	4,404	6,317	1,913	43.4%
60-64	3,563	5,556	1,993	55.9%
65-69	3,193	4,619	1,426	44.7%
70-74	2,751	4,179	1,427	51.9%
75-79	2,164	3,673	1,509	69.7%
80-84	1,703	2,646	943	55.4%
85 & over	2,040	3,278	1,239	60.7%
Total	52,515	65,931	13,416	25.5%

Source: Demographic Projections based on ONS data

Table 79: Projected change in households by age of household reference person in Cambridge, 2020-2041 (medium, 2011 commuting)

Age	2020	2041	Change in households	% Change
16-24	2,787	3,675	888	31.9%
25-29	4,895	5,438	543	11.1%
30-34	5,598	5,740	142	2.5%
35-39	5,245	5,699	454	8.6%
40-44	4,902	5,714	812	16.6%
45-49	4,513	6,062	1,549	34.3%
50-54	4,758	6,989	2,231	46.9%
55-59	4,404	6,502	2,098	47.6%
60-64	3,563	5,686	2,123	59.6%
65-69	3,193	4,716	1,523	47.7%
70-74	2,751	4,258	1,507	54.8%
75-79	2,164	3,731	1,567	72.4%
80-84	1,703	2,681	978	57.4%
85 & over	2,040	3,319	1,279	62.7%
Total	52,515	70,209	17,694	33.7%

Source: Demographic Projections based on ONS data

Table 80: Projected change in households by age of household reference person in Cambridge, 2020-2041 (medium, 1:1 commuting)

Age	2020	2041	Change in households	% Change
16-24	2,787	3,774	987	35.4%
25-29	4,895	5,708	813	16.6%
30-34	5,598	6,155	557	10.0%
35-39	5,245	6,215	969	18.5%
40-44	4,902	6,132	1,230	25.1%
45-49	4,513	6,310	1,797	39.8%
50-54	4,758	7,153	2,395	50.3%
55-59	4,404	6,610	2,206	50.1%
60-64	3,563	5,762	2,199	61.7%
65-69	3,193	4,773	1,580	49.5%
70-74	2,751	4,305	1,553	56.4%
75-79	2,164	3,765	1,601	74.0%
80-84	1,703	2,701	998	58.6%
85 & over	2,040	3,342	1,302	63.9%
Total	52,515	72,704	20,189	38.4%

Source: Demographic Projections based on ONS data

Table 81: Projected change in households by age of household reference person in Cambridge, 2020-2041 (maximum, 2011 commuting)

Age	2020	2041	Change in households	% Change
16-24	2,787	3,750	963	34.6%
25-29	4,895	5,642	748	15.3%
30-34	5,598	6,054	456	8.2%
35-39	5,245	6,089	844	16.1%
40-44	4,902	6,031	1,129	23.0%
45-49	4,513	6,250	1,736	38.5%
50-54	4,758	7,113	2,355	49.5%
55-59	4,404	6,583	2,180	49.5%
60-64	3,563	5,743	2,180	61.2%
65-69	3,193	4,759	1,566	49.0%
70-74	2,751	4,293	1,542	56.0%
75-79	2,164	3,757	1,593	73.6%
80-84	1,703	2,696	993	58.3%
85 & over	2,040	3,337	1,297	63.6%
Total	52,515	72,098	19,583	37.3%

Source: Demographic Projections based on ONS data

Table 82: Projected change in households by age of household reference person in Cambridge, 2020-2041 (maximum, 1:1 commuting)

Age	2020	2041	Change in households	% Change
16-24	2,787	3,894	1,107	39.7%
25-29	4,895	6,031	1,137	23.2%
30-34	5,598	6,652	1,054	18.8%
35-39	5,245	6,833	1,588	30.3%
40-44	4,902	6,633	1,731	35.3%
45-49	4,513	6,607	2,094	46.4%
50-54	4,758	7,350	2,592	54.5%
55-59	4,404	6,739	2,335	53.0%
60-64	3,563	5,852	2,289	64.3%
65-69	3,193	4,841	1,648	51.6%
70-74	2,751	4,360	1,609	58.5%
75-79	2,164	3,806	1,642	75.9%
80-84	1,703	2,725	1,023	60.1%
85 & over	2,040	3,370	1,331	65.2%
Total	52,515	75,694	23,179	44.1%

Source: Demographic Projections based on ONS data

Table 83: Projected change in households by age of household reference person in South Cambridgeshire, 2020-2041 (standard method)

Age	2020	2041	Change in households	% Change
16-24	884	1,065	182	20.5%
25-29	2,741	3,853	1,113	40.6%
30-34	4,474	5,711	1,237	27.6%
35-39	5,659	6,682	1,023	18.1%
40-44	6,468	8,039	1,571	24.3%
45-49	6,831	8,256	1,426	20.9%
50-54	6,798	8,335	1,536	22.6%
55-59	6,488	7,662	1,174	18.1%
60-64	5,678	7,449	1,771	31.2%
65-69	4,943	7,030	2,087	42.2%
70-74	5,175	6,934	1,759	34.0%
75-79	3,936	6,221	2,285	58.0%
80-84	3,144	5,176	2,032	64.6%
85 & over	3,296	6,221	2,925	88.8%
Total	66,514	88,635	22,121	33.3%

Source: Demographic Projections based on ONS data

Table 84: Projected change in households by age of household reference person in South Cambridgeshire, 2020-2041 (medium, 2011 commuting)

Age	2020	2041	Change in households	% Change
16-24	884	1,083	199	22.6%
25-29	2,741	3,920	1,180	43.1%
30-34	4,474	5,815	1,340	30.0%
35-39	5,659	6,800	1,142	20.2%
40-44	6,468	8,156	1,688	26.1%
45-49	6,831	8,354	1,524	22.3%
50-54	6,798	8,416	1,617	23.8%
55-59	6,488	7,724	1,236	19.0%
60-64	5,678	7,500	1,822	32.1%
65-69	4,943	7,074	2,131	43.1%
70-74	5,175	6,973	1,798	34.7%
75-79	3,936	6,251	2,315	58.8%
80-84	3,144	5,198	2,054	65.3%
85 & over	3,296	6,250	2,954	89.6%
Total	66,514	89,514	23,000	34.6%

Source: Demographic Projections based on ONS data

Table 85: Projected change in households by age of household reference person in South Cambridgeshire, 2020-2041 (medium, 1:1 commuting)

Age	2020	2041	Change in households	% Change
16-24	884	1,080	196	22.2%
25-29	2,741	3,908	1,168	42.6%
30-34	4,474	5,796	1,322	29.5%
35-39	5,659	6,779	1,120	19.8%
40-44	6,468	8,135	1,667	25.8%
45-49	6,831	8,337	1,506	22.0%
50-54	6,798	8,401	1,603	23.6%
55-59	6,488	7,713	1,225	18.9%
60-64	5,678	7,491	1,813	31.9%
65-69	4,943	7,066	2,123	42.9%
70-74	5,175	6,966	1,791	34.6%
75-79	3,936	6,246	2,309	58.7%
80-84	3,144	5,194	2,050	65.2%
85 & over	3,296	6,245	2,949	89.5%
Total	66,514	89,356	22,842	34.3%

Source: Demographic Projections based on ONS data

Table 86: Projected change in households by age of household reference person in South Cambridgeshire, 2020-2041 (maximum, 2011 commuting)

Age	2020	2041	Change in households	% Change
16-24	884	1,273	389	44.0%
25-29	2,741	4,639	1,898	69.3%
30-34	4,474	6,918	2,444	54.6%
35-39	5,659	8,063	2,404	42.5%
40-44	6,468	9,408	2,940	45.5%
45-49	6,831	9,400	2,570	37.6%
50-54	6,798	9,282	2,484	36.5%
55-59	6,488	8,378	1,890	29.1%
60-64	5,678	8,049	2,371	41.8%
65-69	4,943	7,539	2,596	52.5%
70-74	5,175	7,385	2,209	42.7%
75-79	3,936	6,574	2,638	67.0%
80-84	3,144	5,430	2,286	72.7%
85 & over	3,296	6,554	3,258	98.9%
Total	66,514	98,892	32,378	48.7%

Source: Demographic Projections based on ONS data

Table 87: Projected change in households by age of household reference person in South Cambridgeshire, 2020-2041 (maximum, 1:1 commuting)

Age	2020	2041	Change in households	% Change
16-24	884	1,259	375	42.4%
25-29	2,741	4,584	1,844	67.3%
30-34	4,474	6,834	2,360	52.8%
35-39	5,659	7,967	2,308	40.8%
40-44	6,468	9,312	2,845	44.0%
45-49	6,831	9,321	2,490	36.5%
50-54	6,798	9,216	2,418	35.6%
55-59	6,488	8,328	1,841	28.4%
60-64	5,678	8,007	2,329	41.0%
65-69	4,943	7,503	2,560	51.8%
70-74	5,175	7,353	2,178	42.1%
75-79	3,936	6,549	2,613	66.4%
80-84	3,144	5,413	2,269	72.2%
85 & over	3,296	6,531	3,235	98.2%
Total	66,514	98,178	31,664	47.6%

Source: Demographic Projections based on ONS data

Table 88: Modelled mix of housing by size and scenario, Cambridge, market housing (local occupancy patterns)

Scenario	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Standard Method	5%	18%	46%	31%
Medium (2011 commuting)	5%	19%	45%	31%
Medium (1:1 commuting)	5%	19%	45%	30%
Maximum (2011 commuting)	5%	19%	45%	30%
Maximum (1:1 commuting)	5%	20%	45%	30%

Source: Housing Market Model

Table 89: Modelled mix of housing by size and scenario, Cambridge, market housing (regional occupancy patterns)

Scenario	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Standard Method	3%	22%	46%	28%
Medium (2011 commuting)	4%	22%	46%	28%
Medium (1:1 commuting)	4%	22%	46%	28%
Maximum (2011 commuting)	4%	22%	46%	28%
Maximum (1:1 commuting)	4%	22%	46%	28%

Source: Housing Market Model

Table 90: Modelled mix of housing by size and scenario, Cambridge, affordable home (local occupancy patterns)

Scenario	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Standard Method	24%	25%	27%	23%
Medium (2011 commuting)	25%	28%	26%	21%
Medium (1:1 commuting)	26%	29%	25%	19%
Maximum (2011 commuting)	26%	29%	25%	20%
Maximum (1:1 commuting)	26%	30%	25%	19%

Source: Housing Market Model

Table 91: Modelled mix of housing by size and scenario, Cambridge, affordable home ownership (regional occupancy patterns)

Scenario	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Standard Method	23%	38%	28%	11%
Medium (2011 commuting)	22%	38%	29%	11%
Medium (1:1 commuting)	22%	38%	29%	11%
Maximum (2011 commuting)	22%	38%	29%	11%
Maximum (1:1 commuting)	21%	38%	29%	11%

Source: Housing Market Model

Table 92: Modelled mix of housing by size and scenario, Cambridge, social/affordable rented (local occupancy patterns)

Scenario	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Standard Method	40%	29%	28%	3%
Medium (2011 commuting)	39%	29%	28%	4%
Medium (1:1 commuting)	39%	29%	28%	4%
Maximum (2011 commuting)	39%	29%	28%	4%
Maximum (1:1 commuting)	38%	29%	29%	4%

Source: Housing Market Model

Table 93: Modelled mix of housing by size and scenario, Cambridge, social/affordable rented (regional occupancy patterns)

Scenario	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Standard Method	33%	33%	30%	3%
Medium (2011 commuting)	32%	33%	31%	3%
Medium (1:1 commuting)	32%	34%	31%	4%
Maximum (2011 commuting)	32%	34%	31%	4%
Maximum (1:1 commuting)	31%	34%	32%	4%

Source: Housing Market Model

Table 94: Modelled mix of housing by size and scenario, South Cambridgeshire, market housing (local occupancy patterns)

Scenario	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Standard Method	3%	20%	40%	37%
Medium (2011 commuting)	3%	20%	40%	38%
Medium (1:1 commuting)	3%	20%	40%	38%
Maximum (2011 commuting)	3%	19%	39%	39%
Maximum (1:1 commuting)	3%	19%	39%	39%

Source: Housing Market Model

Table 95: Modelled mix of housing by size and scenario, South Cambridgeshire, market housing (regional occupancy patterns)

Scenario	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Standard Method	4%	25%	46%	25%
Medium (2011 commuting)	4%	25%	46%	25%
Medium (1:1 commuting)	4%	25%	46%	25%
Maximum (2011 commuting)	4%	24%	46%	26%
Maximum (1:1 commuting)	4%	24%	46%	26%

Source: Housing Market Model

Table 96: Modelled mix of housing by size and scenario, South Cambridgeshire, affordable home ownership (local occupancy patterns)

Scenario	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Standard Method	16%	38%	32%	13%
Medium (2011 commuting)	16%	38%	32%	13%
Medium (1:1 commuting)	16%	38%	32%	13%
Maximum (2011 commuting)	16%	38%	32%	14%
Maximum (1:1 commuting)	16%	38%	32%	14%

Source: Housing Market Model

Table 97: Modelled mix of housing by size and scenario, South Cambridgeshire, affordable home ownership (regional occupancy patterns)

Scenario	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Standard Method	21%	39%	30%	9%
Medium (2011 commuting)	21%	39%	30%	9%
Medium (1:1 commuting)	21%	39%	30%	9%
Maximum (2011 commuting)	21%	39%	30%	10%
Maximum (1:1 commuting)	21%	39%	30%	10%

Source: Housing Market Model

Table 98: Modelled mix of housing by size and scenario, South Cambridgeshire, social/affordable rented (local occupancy patterns)

Scenario	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Standard Method	22%	44%	30%	3%
Medium (2011 commuting)	22%	44%	30%	3%
Medium (1:1 commuting)	22%	44%	30%	3%
Maximum (2011 commuting)	22%	44%	31%	3%
Maximum (1:1 commuting)	22%	44%	31%	3%

Source: Housing Market Model

Table 99: Modelled mix of housing by size and scenario, South Cambridgeshire, social/affordable rented (regional occupancy patterns)

Scenario	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Standard Method	34%	32%	31%	3%
Medium (2011 commuting)	34%	32%	31%	3%
Medium (1:1 commuting)	34%	32%	31%	3%
Maximum (2011 commuting)	33%	32%	32%	3%
Maximum (1:1 commuting)	33%	32%	32%	3%

Source: Housing Market Model

APPENDIX C: Additional data regarding older people and those with disabilities

Table 100: Specialist housing need using SHOP@ assumptions, 2020-2041, Cambridge (units), standard method

Type of housing	Housing demand per 1,000 75+	Current Supply	2020 Demand	Current Shortfall/ Surplus	Additional Demand to 2041	Shortfall/ Surplus by 2041
Housing with Support (rented)	46	874	371	-503	230	-273
Housing with Support (leasehold)	74	305	601	296	372	668
Housing with Care (rented)	20	131	160	29	99	128
Housing with Care (leasehold)	23	0	190	190	118	308
Total	163	1,310	1,322	12	819	831

Source: Derived from Demographic Projections and Housing LIN/EAC

Table 101: Specialist housing need using SHOP@ assumptions, 2020-2041, Cambridge (units), medium (2011 commuting)

Type of housing	Housing demand per 1,000 75+	Current Supply	2020 Demand	Current Shortfall/ Surplus	Additional Demand to 2041	Shortfall/ Surplus by 2041
Housing with Support (rented)	46	874	371	-503	238	-265
Housing with Support (leasehold)	74	305	601	296	386	682
Housing with Care (rented)	20	131	160	29	103	132
Housing with Care (leasehold)	23	0	190	190	122	312
Total	163	1,310	1,322	12	849	861

Source: Derived from Demographic Projections and Housing LIN/EAC

Table 102: Specialist Housing Need using SHOP@ Assumptions, 2020-2041, Cambridge (Units), medium (1:1 commuting)

Type of housing	Housing demand per 1,000 75+	Current Supply	2020 Demand	Current Shortfall/ Surplus	Additional Demand to 2041	Shortfall/ Surplus by 2041
Housing with Support (rented)	46	874	371	-503	243	-260
Housing with Support (leasehold)	74	305	601	296	394	690
Housing with Care (rented)	20	131	160	29	105	134
Housing with Care (leasehold)	23	0	190	190	124	314
Total	163	1,310	1,322	12	866	878

Source: Derived from Demographic Projections and Housing LIN/EAC

Table 103: Specialist Housing Need using SHOP@ Assumptions, 2020-2041, Cambridge (Units), maximum (2011 commuting)

Type of housing	Housing demand per 1,000 75+	Current Supply	2020 Demand	Current Shortfall/ Surplus	Additional Demand to 2041	Shortfall/ Surplus by 2041
Housing with Support (rented)	46	874	371	-503	242	-261
Housing with Support (leasehold)	74	305	601	296	392	688
Housing with Care (rented)	20	131	160	29	104	133
Housing with Care (leasehold)	23	0	190	190	124	314
Total	163	1,310	1,322	12	862	874

Source: Derived from Demographic Projections and Housing LIN/EAC

Table 104: Specialist Housing Need using SHOP@ Assumptions, 2020-2041, Cambridge (Units), maximum (1:1 commuting)

Type of housing	Housing demand per 1,000 75+	Current Supply	2020 Demand	Current Shortfall/ Surplus	Additional Demand to 2041	Shortfall/ Surplus by 2041
Housing with Support (rented)	46	874	371	-503	249	-254
Housing with Support (leasehold)	74	305	601	296	403	699
Housing with Care (rented)	20	131	160	29	107	136
Housing with Care (leasehold)	23	0	190	190	127	317
Total	163	1,310	1,322	12	887	899

Source: Derived from Demographic Projections and Housing LIN/EAC

Table 105: Specialist Housing Need using SHOP@ Assumptions, 2020-2041, South Cambridgeshire (Units), standard method

Type of housing	Housing demand per 1,000 75+	Current Supply	2020 Demand	Current Shortfall/ Surplus	Additional Demand to 2041	Shortfall/ Surplus by 2041
Housing with Support (rented)	36	1,402	529	-873	392	-481
Housing with Support (leasehold)	72	329	1,044	715	774	1,489
Housing with Care (rented)	16	205	233	28	173	201
Housing with Care (leasehold)	23	94	333	239	247	486
Total	147	2,030	2,139	109	1,586	1,695

Source: Derived from Demographic Projections and Housing LIN/EAC

Table 106: Specialist Housing Need using SHOP@ Assumptions, 2020-2041, South Cambridgeshire (Units), medium (2011 commuting)

Type of housing	Housing demand per 1,000 75+	Current Supply	2020 Demand	Current Shortfall/ Surplus	Additional Demand to 2041	Shortfall/ Surplus by 2041
Housing with Support (rented)	36	1,402	529	-873	396	-477
Housing with Support (leasehold)	72	329	1,044	715	782	1,497
Housing with Care (rented)	16	205	233	28	175	203
Housing with Care (leasehold)	23	94	333	239	250	489
Total	147	2,030	2,139	109	1,603	1,712

Source: Derived from Demographic Projections and Housing LIN/EAC

Table 107: Specialist Housing Need using SHOP@ Assumptions, 2020-2041, South Cambridgeshire (Units), medium (1:1 commuting)

Type of housing	Housing demand per 1,000 75+	Current Supply	2020 Demand	Current Shortfall/ Surplus	Additional Demand to 2041	Shortfall/ Surplus by 2041
Housing with Support (rented)	36	1,402	529	-873	396	-477
Housing with Support (leasehold)	72	329	1,044	715	781	1,496
Housing with Care (rented)	16	205	233	28	174	203
Housing with Care (leasehold)	23	94	333	239	249	488
Total	147	2,030	2,139	109	1,600	1,709

Source: Derived from Demographic Projections and Housing LIN/EAC

Table 108: Specialist Housing Need using SHOP@ Assumptions, 2020-2041, South Cambridgeshire (Units), maximum (2011 commuting)

Type of housing	Housing demand per 1,000 75+	Current Supply	2020 Demand	Current Shortfall/ Surplus	Additional Demand to 2041	Shortfall/ Surplus by 2041
Housing with Support (rented)	36	1,402	529	-873	441	-432
Housing with Support (leasehold)	72	329	1,044	715	871	1,586
Housing with Care (rented)	16	205	233	28	195	223
Housing with Care (leasehold)	23	94	333	239	278	517
Total	147	2,030	2,139	109	1,786	1,895

Source: Derived from Demographic Projections and Housing LIN/EAC

Table 109: Specialist Housing Need using SHOP@ Assumptions, 2020-2041, South Cambridgeshire (Units), maximum (1:1 commuting)

Type of housing	Housing demand per 1,000 75+	Current Supply	2020 Demand	Current Shortfall/ Surplus	Additional Demand to 2041	Shortfall/ Surplus by 2041
Housing with Support (rented)	36	1,402	529	-873	438	-435
Housing with Support (leasehold)	72	329	1,044	715	865	1,580
Housing with Care (rented)	16	205	233	28	193	221
Housing with Care (leasehold)	23	94	333	239	276	515
Total	147	2,030	2,139	109	1,772	1,881

Source: Derived from Demographic Projections and Housing LIN/EAC

Table 110: Older persons' care bed space requirements, 2020-2041, Cambridge

Scenario	Housing demand per 1,000 75+	Current Supply	2020 Demand	Current Shortfall/ Surplus	Additional Demand to 2041	Shortfall/ Surplus by 2041
Standard Method	105	1,170	855	-315	530	215
Medium (2011 commuting)	105	1,170	855	-315	549	235
Medium (1:1 commuting)	105	1,170	855	-315	560	246
Maximum (2011 commuting)	105	1,170	855	-315	558	243
Maximum (1:1 commuting)	105	1,170	855	-315	574	259

Source: Derived from Demographic Projections and Housing LIN/HOPSR/EAC

Table 111: Older persons' care bed space requirements, 2020-2041, South Cambridgeshire

Scenario	Housing demand per 1,000 75+	Current Supply	2020 Demand	Current Shortfall/ Surplus	Additional Demand to 2041	Shortfall/ Surplus by 2041
Standard Method	95	742	1,384	642	1,026	1,668
Medium (2011 commuting)	95	742	1,384	642	1,037	1,679
Medium (1:1 commuting)	95	742	1,384	642	1,035	1,677
Maximum (2011 commuting)	95	742	1,384	642	1,155	1,798
Maximum (1:1 commuting)	95	742	1,384	642	1,146	1,789

Source: Derived from Demographic Projections and Housing LIN/HOPSR/EAC

Table 112: Estimated change in population with LTHPD, 2020-2041, Cambridge

Scenario	Population with LTHPD (2020)	Population with LTHPD (2041)	Change	% Change
Standard Method	18,141	24,562	6,421	35.4%
Medium (2011 commuting)	18,141	25,517	7,376	40.7%
Medium (1:1 commuting)	18,141	26,073	7,932	43.7%
Maximum (2011 commuting)	18,141	25,938	7,797	43.0%
Maximum (1:1 commuting)	18,141	26,740	8,599	47.4%

Source: Derived from Demographic Modelling and Census 2011

Table 113: Estimated change in population with LTHPD, 2020-2041, South Cambridgeshire

Scenario	Population with LTHPD (2020)	Population with LTHPD (2041)	Change	% Change
Standard Method	24,211	33,861	9,651	39.9%
Medium (2011 commuting)	24,211	34,116	9,905	40.9%
Medium (1:1 commuting)	24,211	34,070	9,860	40.7%
Maximum (2011 commuting)	24,211	36,833	12,622	52.1%
Maximum (1:1 commuting)	24,211	36,626	12,415	51.3%

Source: Derived from Demographic Modelling and Census 2011

Table 114: Projected changes to population with a range of disabilities, Cambridge (standard method)

Disability	Age Range	2020	2041	Change	% Change
Mental Disabilities: Dementia	65+	1,272	2,020	748	58.8%
Mental Disabilities: Autistic Spectrum Disorders	18-64	1,028	1,180	152	14.8%
Mental Disabilities: Autistic Spectrum Disorders	65+	153	242	89	57.8%
Mental Disabilities: Learning Disabilities	15-64	2,537	2,931	394	15.5%
Mental Disabilities: Learning Disabilities	65+	343	516	173	50.3%
Mental Disabilities: Challenging behaviour	15-64	46	53	7	15.5%
Physical Disabilities: Mobility problems	65+	3,211	4,956	1,745	54.4%
Physical Disabilities: Impaired mobility	16-64	3,843	4,737	894	23.3%

Source: POPPI/PANSI and Demographic Projections

Table 115: Projected changes to population with a range of disabilities, Cambridge, medium (2011 commuting)

Disability	Age Range	2020	2041	Change	% Change
Mental Disabilities: Dementia	65+	1,272	2,048	777	61.1%
Mental Disabilities: Autistic Spectrum Disorders	18-64	1,028	1,261	233	22.7%
Mental Disabilities: Autistic Spectrum Disorders	65+	153	246	93	60.5%
Mental Disabilities: Learning Disabilities	15-64	2,537	3,140	602	23.7%
Mental Disabilities: Learning Disabilities	65+	343	525	181	52.8%
Mental Disabilities: Challenging behaviour	15-64	46	57	11	23.8%
Physical Disabilities: Mobility problems	65+	3,211	5,029	1,819	56.6%
Physical Disabilities: Impaired mobility	16-64	3,843	5,027	1,184	30.8%

Source: POPPI/PANSI and Demographic Projections

Table 116: Projected changes to population with a range of disabilities, Cambridge, medium (1:1 commuting)

Disability	Age Range	2020	2041	Change	% Change
Mental Disabilities: Dementia	65+	1,272	2,065	793	62.4%
Mental Disabilities: Autistic Spectrum Disorders	18-64	1,028	1,309	280	27.3%
Mental Disabilities: Autistic Spectrum Disorders	65+	153	249	95	62.1%
Mental Disabilities: Learning Disabilities	15-64	2,537	3,261	724	28.5%
Mental Disabilities: Learning Disabilities	65+	343	530	186	54.3%
Mental Disabilities: Challenging behaviour	15-64	46	59	13	28.7%
Physical Disabilities: Mobility problems	65+	3,211	5,072	1,861	58.0%
Physical Disabilities: Impaired mobility	16-64	3,843	5,196	1,353	35.2%

Source: POPPI/PANSI and Demographic Projections

Table 117: Projected changes to population with a range of disabilities, Cambridge, maximum (2011 commuting)

Disability	Age Range	2020	2041	Change	% Change
Mental Disabilities: Dementia	65+	1,272	2,061	789	62.1%
Mental Disabilities: Autistic Spectrum Disorders	18-64	1,028	1,297	269	26.2%
Mental Disabilities: Autistic Spectrum Disorders	65+	153	248	95	61.7%
Mental Disabilities: Learning Disabilities	15-64	2,537	3,232	694	27.4%
Mental Disabilities: Learning Disabilities	65+	343	529	185	53.9%
Mental Disabilities: Challenging behaviour	15-64	46	58	13	27.5%
Physical Disabilities: Mobility problems	65+	3,211	5,062	1,851	57.7%
Physical Disabilities: Impaired mobility	16-64	3,843	5,155	1,312	34.2%

Source: POPPI/PANSI and Demographic Projections

Table 118: Projected changes to population with a range of disabilities, Cambridge, maximum (1:1 commuting)

Disability	Age Range	2020	2041	Change	% Change
Mental Disabilities: Dementia	65+	1,272	2,085	813	64.0%
Mental Disabilities: Autistic Spectrum Disorders	18-64	1,028	1,365	337	32.8%
Mental Disabilities: Autistic Spectrum Disorders	65+	153	252	98	64.0%
Mental Disabilities: Learning Disabilities	15-64	2,537	3,407	870	34.3%
Mental Disabilities: Learning Disabilities	65+	343	536	192	56.0%
Mental Disabilities: Challenging behaviour	15-64	46	61	16	34.5%
Physical Disabilities: Mobility problems	65+	3,211	5,123	1,913	59.6%
Physical Disabilities: Impaired mobility	16-64	3,843	5,399	1,556	40.5%

Source: POPPI/PANSI and Demographic Projections

Table 119: Projected changes to population with a range of disabilities, South Cambridgeshire (standard method)

Disability	Age Range	2020	2041	Change	% Change
Mental Disabilities: Dementia	65+	2,182	3,825	1,643	75.3%
Mental Disabilities: Autistic Spectrum Disorders	18-64	957	1,182	225	23.5%
Mental Disabilities: Autistic Spectrum Disorders	65+	291	453	163	55.9%
Mental Disabilities: Learning Disabilities	15-64	2,470	3,011	541	21.9%
Mental Disabilities: Learning Disabilities	65+	642	974	331	51.6%
Mental Disabilities: Challenging behaviour	15-64	46	56	10	21.9%
Physical Disabilities: Mobility problems	65+	5,700	9,412	3,712	65.1%
Physical Disabilities: Impaired mobility	16-64	5,511	6,657	1,146	20.8%

Source: POPPI/PANSI and Demographic Projections

Table 120: Projected changes to population with a range of disabilities, South Cambridgeshire, medium (2011 commuting)

Disability	Age Range	2020	2041	Change	% Change
Mental Disabilities: Dementia	65+	2,182	3,844	1,662	76.1%
Mental Disabilities: Autistic Spectrum Disorders	18-64	957	1,197	240	25.1%
Mental Disabilities: Autistic Spectrum Disorders	65+	291	456	165	56.7%
Mental Disabilities: Learning Disabilities	15-64	2,470	3,050	580	23.5%
Mental Disabilities: Learning Disabilities	65+	642	979	336	52.3%
Mental Disabilities: Challenging behaviour	15-64	46	56	11	23.4%
Physical Disabilities: Mobility problems	65+	5,700	9,458	3,758	65.9%
Physical Disabilities: Impaired mobility	16-64	5,511	6,726	1,215	22.0%

Source: POPPI/PANSI and Demographic Projections

Table 121: Projected changes to population with a range of disabilities, South Cambridgeshire, medium (1:1 commuting)

Disability	Age Range	2020	2041	Change	% Change
Mental Disabilities: Dementia	65+	2,182	3,841	1,658	76.0%
Mental Disabilities: Autistic Spectrum Disorders	18-64	957	1,194	238	24.8%
Mental Disabilities: Autistic Spectrum Disorders	65+	291	455	165	56.6%
Mental Disabilities: Learning Disabilities	15-64	2,470	3,043	573	23.2%
Mental Disabilities: Learning Disabilities	65+	642	978	335	52.2%
Mental Disabilities: Challenging behaviour	15-64	46	56	11	23.2%
Physical Disabilities: Mobility problems	65+	5,700	9,450	3,750	65.8%
Physical Disabilities: Impaired mobility	16-64	5,511	6,714	1,203	21.8%

Source: POPPI/PANSI and Demographic Projections

Table 122: Projected changes to population with a range of disabilities, South Cambridgeshire, maximum (2011 commuting)

Disability	Age Range	2020	2041	Change	% Change
Mental Disabilities: Dementia	65+	2,182	4,043	1,860	85.3%
Mental Disabilities: Autistic Spectrum Disorders	18-64	957	1,359	402	42.1%
Mental Disabilities: Autistic Spectrum Disorders	65+	291	481	190	65.4%
Mental Disabilities: Learning Disabilities	15-64	2,470	3,470	1,000	40.5%
Mental Disabilities: Learning Disabilities	65+	642	1,032	390	60.7%
Mental Disabilities: Challenging behaviour	15-64	46	64	18	40.3%
Physical Disabilities: Mobility problems	65+	5,700	9,949	4,249	74.5%
Physical Disabilities: Impaired mobility	16-64	5,511	7,463	1,952	35.4%

Source: POPPI/PANSI and Demographic Projections

Table 123: Projected changes to population with a range of disabilities, South Cambridgeshire, maximum (1:1 commuting)

Disability	Age Range	2020	2041	Change	% Change
Mental Disabilities: Dementia	65+	2,182	4,028	1,845	84.6%
Mental Disabilities: Autistic Spectrum Disorders	18-64	957	1,347	390	40.8%
Mental Disabilities: Autistic Spectrum Disorders	65+	291	479	188	64.7%
Mental Disabilities: Learning Disabilities	15-64	2,470	3,438	968	39.2%
Mental Disabilities: Learning Disabilities	65+	642	1,028	386	60.0%
Mental Disabilities: Challenging behaviour	15-64	46	63	18	39.0%
Physical Disabilities: Mobility problems	65+	5,700	9,912	4,211	73.9%
Physical Disabilities: Impaired mobility	16-64	5,511	7,407	1,896	34.4%

Source: POPPI/PANSI and Demographic Projections

Table 124: Estimated need for wheelchair user homes, 2020-2041, Cambridge

Scenario	Current need	Projected need (2020-41)	Total current and future need	Housing need (2020-41)	% of Housing Need
Standard Method	298	570	869	13,818	6.3%
Medium (2011 commuting)	298	628	926	18,225	5.1%
Medium (1:1 commuting)	298	661	960	20,795	4.6%
Maximum (2011 commuting)	298	653	952	20,170	4.7%
Maximum (1:1 commuting)	298	701	1,000	23,874	4.2%

Source: Derived from a range of sources

Table 125: Estimated need for wheelchair user homes, 2020-2041, South Cambridgeshire

Scenario	Current need	Projected need (2020-41)	Total current and future need	Housing need (2020-41)	% of Housing Need
Standard Method	428	1,054	1,482	22,785	6.5%
Medium (2011 commuting)	428	1,072	1,499	23,690	6.3%
Medium (1:1 commuting)	428	1,068	1,496	23,527	6.4%
Maximum (2011 commuting)	428	1,255	1,682	33,349	5.0%
Maximum (1:1 commuting)	428	1,241	1,668	32,614	5.1%

Source: Derived from a range of sources

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