



UNIVERSITY OF
CAMBRIDGE

North West Cambridge

Future Phases of Eddington

September 2025



Affordable Housing Statement



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North West Cambridge
Masterplan

September 2025

Contents

Executive Summary	3
1 Introduction	4
2 Overview of Proposals	5
3 Planning Policy Context	9
4 Evidence of Affordable Housing Need	13
5 Analysis	22
6 Conclusion	24

Executive Summary

This Affordable Housing Statement (“the Statement”) has been prepared in support of an outline planning application (‘OPA’ / ‘the Application’) for the North West Cambridge Masterplan (‘NWCM’) at Land Between Huntingdon Road, Madingley Road and M11, Eddington, North West Cambridge, Cambridgeshire (‘the Site’). It is submitted on behalf of The University of Cambridge (‘UoC’ / ‘the Applicant’).

The North West Cambridge Area Action Plan (2009) allocates 50% of Eddington Homes for University of Cambridge Key Workers, recognising the need to: fulfil its mission to contribute to society through the pursuit of education, learning and research at the highest international levels of excellence; respond positively to Government policy for growth in the higher education sector; and work actively to support the expansion of the knowledge-based economy.

The University’s researchers and academic staff drive £5bn in economic value from research and ensure the University can continue to compete globally. A vibrant, successful University ensures Cambridge remains a thriving city at the heart of the UK’s modern industrial strategy.

In 2025 1,121 homes have been delivered at Eddington as part of the extant planning permission, of which 686 are Key Worker Housing (KWH) and 435 market homes. The KWH have already provided homes for around 2,000 tenants.

The KWH comprises a mix of sizes and as the remainder of the Site is brought forward the proposals will continue to commit to ensuring 50% of units are for Key Workers. The University recently undertook a survey of employee housing needs, which not only reaffirmed the scale of need for Key Workers but has also helped to shape the type of housing that best meets their needs – which is distinct.

The focus of requirements from the Key Workers is from the younger, single income professionals who relocate to Cambridge on fixed term contracts, the majority of whom are in research roles. The need is for affordable and flexible accommodation close to the University that is good quality, with good tenancy terms and within a wider community that is inclusive and welcoming. Cambridge has a shortage of such homes, and key workers struggle disproportionately to find a suitable place to live, experience greater dissatisfaction and in turn present a significant risk to the University being able to have confidence in its ability to attract staff to these vital and very specific roles.

The proposed housing at Eddington within this application expansion aligns with national and local planning policy, addresses a well-evidenced institutional need, and supports the sustainable growth of both the University and the city. It also relieves pressure on the private rental market, particularly within shared housing (HMOs) in central Cambridge, supporting broader city-wide housing objectives.

1 Introduction

- 1.1 This Affordable Housing Statement (“the Statement”) has been prepared in support of an outline planning application (‘OPA’) for the North West Cambridge Masterplan (‘NWCM’) at Land Between Huntingdon Road, Madingley Road and M11, Eddington, North West Cambridge, Cambridgeshire (‘the Site’). It is submitted on behalf of the University of Cambridge (‘UoC’ / ‘the Applicant’).
- 1.2 This Statement sets out the details of the proposed affordable housing including the amount, tenure and type that will be provided and analyses this against relevant policy and other material planning considerations.
- 1.3 The Statement is structured as follows:
 - An overview of the Site and the application (Section 2)
 - Extracts of key policy relevant to the housing proposals (Section 3);
 - An analysis of local demand for the proposed affordable housing (Section 4);
 - A summary of benefits of the Proposed Development (Section 5); and
 - Conclusion (Section 6)
- 1.4 This Statement should be read in conjunction with other planning application documents, including but not limited to the Planning Statement and the Design and Access Statement.

2 Overview of Proposals

The Application Site

- 2.1 The Site is located approximately 2km north-west of Cambridge city centre and comprises land between Huntingdon Road (A1307), Madingley Road (A1303) and the M11. The Site forms part of the emerging settlement of Eddington.
- 2.2 The Site is located across the administrative boundary of South Cambridgeshire District Council (“SCDC”) and Cambridge City Council (“CCC”) which are therefore the Local Planning Authorities (“LPAs”) for the site. The Greater Cambridge Shared Planning Service (“GCSPS”) manages planning services on behalf of SCDC and CCC.

Eddington To Date

- 2.3 The Planning Statement provides details on the Eddington scheme, the original permission (granted in February 2013) and what has been delivered to date. In relation to affordable housing the existing permission secures:
 - 2.3.1 50% affordable housing for University Key Workers;
 - 2.3.2 To be eligible, employees must have a contract of employment (>18 hours a week) with the University of Cambridge, a College of the University of Cambridge and/or an affiliated organisation, with a defined time remaining on that contract;
 - 2.3.3 A lettings protocol is in place which prioritises employees filling ‘Hard to Fill’ posts, and those who are re-locating to Cambridge; and
 - 2.3.4 A rent setting mechanism which aligns rents to salaries.
- 2.4 To date, of the 1,848 homes in the first phase, 1,121 have been delivered – comprising 686 homes for University Key Workers and 435 market homes. The Planning Statement provides a comprehensive overview what has been delivered to date and this highlights the breadth of investment by the University into the Eddington community and wider place making. The housing provided to date demonstrates:
 - 2.4.1 The importance of Eddington in providing affordable housing for its staff, so it can attract and retain top talent to maintain its global competitiveness
 - 2.4.2 The wider benefits of housing staff in a purpose-built, high quality neighbourhood, specifically the reduction in demand on the wider housing market in the city.
- 2.5 The ability to bring forward further residential dwellings under the Outline Planning Permission (through Reserved Matters Applications) expired in 2023. As a result, the University needs to bring forward a new planning application for the Future Phases of the NWCM.

Proposed Development

- 2.6 This application is intended to secure Future Phases of the NWCM. A description of development (the ‘Proposed Development’) is provided below:

“Outline planning application (all matters reserved except for means of access to the public highway) for a phased mixed use development, including demolition of existing buildings and structures, such development comprising:

- *Living Uses, comprising residential floorspace (Class C3/C4, up to 3,800 dwellings), student accommodation (Sui Generis), Co-living (Sui Generis) and Senior Living (Class C2);*
- *Flexible Employment Floorspace (Class E(g) / Sui Generis research uses);*
- *Academic Floorspace (Class F1); and*
- *Floorspace for supporting retail, nursery, health and indoor sports and recreation uses (Class E (a) – E (f)).*
- *Public open space, public realm, sports facilities, amenity space, outdoor play, allotments and hard and soft landscaping works alongside supporting facilities;*
- *Car and cycle parking, formation of new pedestrian, cyclist and vehicular accesses and means of access and circulation routes within the site;*
- *Highway works;*
- *Site clearance, preparation and enabling works;*
- *Supporting infrastructure, plant, drainage, utility, earthworks and engineering works.”*

- 2.7 A full description of the proposals along with the control documents is set out in the Planning Statement.

- 2.8 The precise number of residential units delivered at Eddington will be determined through the preparation of Reserved Matters Applications (“RMAs”). At present, it is anticipated that the residential floorspace cap and unit mix range would deliver circa 3,800 residential units under the 2025 NWCM.

- 2.9 The homes will be provided as 50% market homes and 50% affordable homes, all of which will meet the needs of Cambridge University Key Workers, who are defined as *“staff employed by the University and/or its colleges, which the University accept as a priority for housing having regard to their level of housing need and their contribution to the functioning and success of the University and its colleges, and affiliated organisations”*.

- 2.10 The core principles of the Key Worker housing to be delivered in the future phases can be summarised as:

- Homes meet the definition of “affordable private rent” within part (b) of the definition of “affordable housing” in the glossary to the National Planning Policy Framework (December 2024) and being provided as purpose-built housing and meeting the definition of a “build to rent scheme” as defined in the glossary;
- Rents set at a discount to market of at least 20% (including service charges) with this discount being calculated when a discounted home is rented out, or when the tenancy is renewed;

- In-tenancy rent increases permitted at CPI + 1%;

2.11 Whilst refined to ensure alignment with the most recent NPPF, the principles remain consistent with those in the original 2013 consent.

2.12 The wider benefits of the key worker homes are set out in Section 5 of this Statement.

Unit Size Mix

2.13 The market and affordable homes will comprise a mix of unit sizes which are provided as ranges to allow for flexibility as the scheme comes forward. The unit size mix of the key worker housing is differentiated from the market housing as the needs evidence has identified very specific requirements.

Table 1: Market Unix Mix Parameters

Unit Type	Minimum	Maximum	<i>Illustrative Scheme</i>
Single Person Unit	n/a	7.5%	3%
1 Bed	10%	30%	20%
2 Bed	25%	45%	35%
3 Bed	10%	35%	16%
4 Bed+	20%	45%	26%

Table 2: KWH Unit Mix Parameters

Unit Type	Minimum	Maximum	<i>Illustrative Scheme</i>
1 person*	30%	55%	30%
1 bedroom	15%	35%	35%
2 bedroom	10%	35%	32.5%
3 bedroom+	2 %	5%	2.5%

* 1 person* is a unit comprising either:

- Studio Self Contained Unit
- Studio Community Unit –a combination of self-contained private and shared amenity spaces to respond to the specific requirements of University Staff

Benefits of KWH

2.14 The provision of affordable housing for key workers delivers a range of benefits for the University, the wider city of Cambridge, and the local housing market. In addition to meeting a clear institutional need, the delivery of staff accommodation contributes to more balanced

communities, improved sustainability outcomes, and continued success in the regional economy.

- 2.15 Eddington directly addresses the needs identified in the survey, providing homes that benefit from high-quality design, proximity to employment and education, and a range of amenities that encourage long-term residency and neighbourhood stability. The delivery model allows for direct management of allocations, rent levels, and tenancy standards, ensuring consistency and alignment with institutional priorities.
- 2.16 The provision of good quality and affordable housing at Eddington can have far reaching benefits, which can be summarised as:

For Employees:

- 2.17 A meaningful impact on the quality of life for key workers: the University's housing needs survey has revealed that those occupying University accommodation are happier with their living circumstances and are able to afford their housing costs more comfortably.
- 2.18 Those for whom the University accommodation is suitable for, but are not able to secure tenancies due to supply, are living in private rented housing in the city.

For the University:

- 2.19 The provision of housing dedicated for key workers will be instrumental in securing the University's long-term success and position on a global stage. The University is ranked as one of the top five global establishments based on its research capabilities. Eddington will provide the accommodation needed to enable the University to continue to grow its research capabilities and maintain its global position so it can attract the best students and staff.

For the city of Cambridge and its residents:

- 2.20 Where staff are recruited from outside the Cambridge area, a failure to meet the housing needs that the University has created results in significant additional pressure in the local housing market (concentrated within the private rented sector), leading to a shortage of available housing and upwards pressure on prices for all. The delivery of housing for key workers mitigates some of this pressure on the local market, freeing up housing for local people.
- 2.21 The provision of housing will serve the continued growth of the University and maintenance of its status as world-class institution, in turn contributing to the long-term growth and prosperity for the local, regional, and national economy through increased spending power and spin-off business operations and investment.

3 Planning Policy Context

- 3.1 This section of the Statement provides an overview of relevant planning policy and guidance considerations specific to the proposed housing. It is important that this is read within the context of wider planning reform and the growth objectives both nationally and for the Cambridge area, including the establishment of the Cambridge Growth Company to enable and accelerate development which align with the government's ambitions for Cambridge. This is set out in the Planning Statement.
- 3.2 Planning decisions are required to be made in accordance with the development plan and other material planning considerations. Core statutory planning documents affecting the Site comprise the Cambridge Local Plan (2018), South Cambridge Local Plan (2018), and North West Cambridge Area Action Plan (2009). Material considerations include the National Planning Policy Framework (NPPF), revised in December 2024.

National Planning Policy Framework (NPPF, 2024)

- 3.3 The NPPF sets out the Government's planning policies for England and outlines how these are expected to be applied; it is a material consideration in planning decisions. The NPPF was most recently published in December 2024 to reflect the Labour government's pro-growth agenda.
- 3.4 The NPPF establishes that plans and decision making should ensure delivery of a wide choice of high-quality homes for a range of needs for today and in the future (paragraph 8(b)).
- 3.5 Section 5 ("Delivering a sufficient supply of homes") highlights the need for local planning authorities to support the development of homes to meet the needs of different groups. Paragraph 63 requires planning authorities to ensure that the size, type, tenure and range of housing reflects local needs, including those for affordable housing and specific needs.
- 3.6 The recent revision to the NPPF explicitly encourages mixed tenure sites, acknowledging this can *"provide a range of benefits, including creating diverse communities and supporting timely build out rates, and local planning authorities should support their development through their policies and decisions"* (paragraph 71).
- 3.7 Paragraph 77 recognises that the supply of large numbers of new homes can often be best achieved through large scale development where it can:
- Offer the potential to utilise existing or planned investment in infrastructure (para 77a);
 - Support an area's economic potential (para 77a).
 - Be located to provide access to services, employment (para 77b) and a choice of transport modes (para 77).
 - Provide the quality of design that enables the needs of different groups in the community to be met (para 77c).

- Be supported by necessary infrastructure (para 77).
- Achieve rates of delivery that are realistic (para 77d) recognising how the right tenures may support timely build out rates (para 71).

3.8 Section 6, building a strong competitive economy, notes that planning policies should seek to address potential barriers to investment, such as inadequate housing. It also notes the importance of planning policies being flexible enough to accommodate needs not anticipated in the plan, such as live-work accommodation for new and flexible working practices.

3.9 The NPPF defines affordable housing in Annex 2 as “*housing for sale or rent, for those whose needs are not met by the market (including housing that provides a subsidised route to home ownership and/or is for essential local workers)*”. Homes must also comply with at least one definition of tenure.

3.10 ‘Other affordable housing for rent’ must meet the following conditions: (a) the rent is set in accordance with the Government’s rent policy for Affordable Rent, or is at least 20% below local market rents (including service charges where applicable); (b) the landlord is a registered provider, except where it is included as part of a Build to Rent scheme (in which case the landlord need not be a registered provider); and (c) it includes provisions to remain at an affordable price for future eligible households, or for the subsidy to be recycled for alternative affordable housing provision.

Local Policy

3.11 The Development Plan comprises:

- Cambridge Local Plan (2018)
- South Cambridgeshire Local Plan (2018)
- North West Cambridge Area Action Plan (“AAP”) (2009)

3.12 The Cambridge Local Plan sets out strategic policies on housing, affordable housing and economic development in Cambridge. Section Six: Maintaining a Balanced Supply of Housing, begins:

“Housing in Cambridge has an important part to play in supporting both the local and national economy, as well as being critical in promoting well-being and achieving positive health outcomes ...demand for housing is high, with high rents and high house prices. It is important to increase the supply of all types of housing, including affordable housing, and maintain a mix of different sizes, types and tenures of housing to meet a wide range of housing needs”.

3.13 The Cambridge Local Plan and South Cambridgeshire Local Plan identify parts of the Site for major development within their respective boundaries.

- 3.14 Paragraph 2.38 of the Cambridge Local Plan notes the Site is subject to the policies set out in the North West Cambridge AAP, which was jointly developed and adopted in 2009 by Cambridge City Council and South Cambridgeshire District Council.
- 3.15 Paragraph 2.2 of the AAP recognises that given the longstanding difficulties in the local housing market the University needs to achieve a fourfold increase in its provision of housing available to staff. This need is to deal with recruitment and retention problems arising from local house prices and rental level. The objectives of the AAP set out in paragraph 2.5 include creating a satisfactory mix of uses, taking into account identified University development needs and the need for affordable housing for University and College staff, as well as securing a wide range of housing types and tenures.
- 3.16 Policy NW6: ‘Affordable Housing’ states that housing developments will only be permitted if they provide 50% affordable housing to meet the needs of Cambridge University and College key workers (as distinct from units of student accommodation), but account will be taken of any particular costs associated with the development (e.g. infrastructure provision) and other viability considerations, whether there are other planning objectives that need to be given priority, and the need to ensure balanced and sustainable communities. The occupation of such housing will be limited to Cambridge University and College key workers in housing need. It must be available over the long-term. Contributions for off-site provision will not be appropriate.
- 3.17 Supporting paragraph 4.7 states that in determining planning applications for residential development, the authorities will have regard to any evidence of housing need, housing costs, household incomes and development viability which is available at that time.
- 3.18 Policy NW7: ‘Balanced and Sustainable Communities’ states that affordable housing will be intermingled with the market housing in small groups or clusters, whilst the student housing can be provided in a number of groups distributed across each phase of development.
- 3.19 The AAP also states that a suitable mix of house types, sizes and tenure (including affordable housing) will be provided, attractive to and meeting the needs of, all ages and sectors of society including those with disabilities. The mix in each particular development will be determined by evidence at the time of planning permission, including housing need, development costs and viability, and the achievement of mixed and balanced communities.

Greater Cambridge Housing Strategy (GCHS, 2024–2029)

- 3.20 The GCHS was jointly developed by Cambridge City and South Cambridgeshire District Councils to inform housing delivery across the sub-region. The document cites an ongoing ‘Affordability Challenge’ across Greater Cambridge, stating that:

“High prices are fuelled by high demand which itself is fuelled by the strength of the local economy and in-migration of highly skilled workers. The councils are also acutely aware of recruitment issues within the local workforce linked to the high cost of housing in the area.” (p.12)

- 3.21 The strategy expresses firm support for private landowners wishing to bring forward housing to address specific, identified needs, such as homes for young professionals or community-led housing developments. Overall, the Councils aim to ensure:

“That the needs of local workers who struggle to afford market housing are considered - particularly in allocating affordable housing - where this can help support the local economy and local services and help minimise travel to work.”

Cambridgeshire and Peterborough Combined Authority Housing Strategy (2018–2023)

- 3.22 Identifies the acute housing affordability challenges across the region, particularly in Cambridge, and supports interventions that directly deliver affordable homes for low-to-middle income earners, including key public sector and academic staff. The Strategy backs public and institutional landowners in delivering affordable housing on their own estates, citing university-led developments (like Eddington) as exemplars.

Emerging Planning Policy

Local Plan for Cambridge City Council and South Cambridgeshire District Council

- 3.23 Cambridge City Council and South Cambridgeshire District Council have begun preparing a Joint Local Plan. A Regulation 18: ‘Preferred Options’ consultation was undertaken in 2021, however the next formal plan making stages will not begin until autumn/winter 2025.
- 3.24 Policy S/NWC provides the detailed policy for the North West Cambridge site which includes additional policy provision to accommodate more homes within the existing site boundary, through changes to the dwelling mix and appropriate intensification of development areas that have yet to be built. This is anticipated to be in the region of 1,000 to 1,500 homes, with the final figure for the Local Plan to be derived from a detailed review of the masterplan.
- 3.25 The North West Cambridge Area Action Plan requirement for 50% affordable homes (specifically to meet the needs of Cambridge University and College key workers in housing need), is re-affirmed. The policy also requires up to date evidence of the need for affordable housing for key workers to be provided.

Further Information

- 3.26 Further details of the application site, application scheme proposals and relevant planning policy considerations are set out in the Planning Statement.

4 Evidence of Affordable Housing Need

- 4.1 The University recognises the importance of housing to its staff and this affects recruitment, retention, and the quality of life of the University's working community.
- 4.2 The Cambridge area is expensive, making it difficult for the University's employees to find affordable, good quality housing. This is especially the case for newcomers relocating to Cambridge, many of whom are critical to the University's postdoctoral community and are vital to the success of the University. Being able to access the right type of housing is incredibly important to the many new staff that relocate to Cambridge to take up highly specialised research roles that are crucial to Cambridge's reputation globally as a leading research institution. It is essential that Cambridge is a feasible destination for these staff to relocate to, but availability and affordability of housing has been a long-established challenge.
- 4.3 The University has already directly responded to these concerns, recognising this investment is important in its ability to succeed in its objective of recruiting and retaining the world's leading talent in research and education. Through its own developments, the University is directly responding to and meeting its needs and feedback confirms the key worker homes delivered to date are making a positive difference in meeting the needs of workers – benefiting the individuals, the University, and the city.

Historic Housing Need

- 4.4 The University conducted a Housing Needs Study of employees in 2008, which informed the types of homes that have been provided at Eddington to date. The study confirmed that the University required c. 2,000 new staff each year to replace those vacating jobs. The majority (40%) of those replaced annually were contract research staff, followed by support staff (22%) and academic staff (8%). Gross turnover was 24%, or 2,122 new staff annually. This figure was anticipated to rise to between 2,400 and 3,280 staff per year by 2021.
- 4.5 The report signalled the aforementioned future growth at the University was expected to focus on its research functions. As such, significant growth in contract research staff numbers were vital to the future prospects of the University, meaning that contract research staff were likely to be a high proportion of the priority key workers. This along with further analysis undertaken in mid-2008 of existing employees helped to inform the proposals set out in the (Outline Planning Permission) OPP for North West Cambridge.

Housing Need Today

- 4.6 To inform the OPA, up-to-date evidence on housing needs of Key Workers working for the University is important in shaping the types, tenures and affordability of housing that is brought forward. There are specific needs associated with the University which are critical to be embraced and responded to if the huge growth potential of Cambridge is to be realised. The 2024 Case for Growth recognises the constraint of housing on growth in the area. The international reputation of the University and its capabilities are key to the vision for growth for

Cambridge and failure to bring forward the right homes to meet the needs of its workers will add to the growth constraints.

- 4.7 An updated snapshot of the number of staff employed by the University is set out in the table below. Since the 2008 survey, the number of researchers has increased by almost 60% from 2,535 to 4,024. This is very much a success but further highlights the criticality of ensuring that homes are being provided to meet future as well as existing needs.

Table 3: University Staff by Job Category (December 2024)

Staff Group	No. employees	Percentage
Academic	2,160	15.60%
Apprentice	48	0.35%
Professional, Support or Technical Staff (PST Staff)	7,614	54.99%
Researcher	4,024	29.06%
Total	13,846	100.00%

- 4.8 The latest Housing Need Survey was undertaken in 2024 with a key focus being to inform the housing proposals for Eddington, identifying and filling the gaps in the market, recognising the specific needs – for example of postdocs – that are very different to wider market needs.
- 4.9 The 2024 survey was structured similarly to the 2008 study to enable comparisons. It received c.2,200 completions by University employees. The response rate gives a high level of confidence in the findings. The assessment provides a refreshed evidence base to inform future phases of housing delivery and ensures that the University continues to respond to real and changing needs among its staff.
- 4.10 The survey revealed distinct differences between roles within University staff, which have been important in informing the needs for Key Worker Housing at Eddington – which will ensure the needs of those facing the greatest challenges are understood and will be used to inform the OPA.

Employment Characteristics

- 4.11 The University is attracting significant numbers of people to live in Cambridge; however this is on a rotational basis due to the nature of contracts of many of these staff members.
- 4.12 Over half of the survey respondents relocated to Cambridge; with 27% relocating from within the UK and 28% relocating from overseas. The members of staff who are relocating, coming into the City, are predominantly within research and academic roles (83% and 79% respectively). These are members of staff who have not previously lived in the city, often do not have existing networks of family or friends, are not familiar with how the city functions and are for whom sourcing accommodation is challenging given the very limited availability of homes. Understanding the tenure, type and location of homes to meet these needs is a key

priority in shaping the homes to be provided at Eddington as there is an opportunity to engage directly with new recruits directing them away from the city centre, where there is already a shortage of homes to rent, and towards University Key Worker housing.

- 4.13 The vast majority (86%) of researchers who are relocating are on fixed-term contracts – these are roles which are intended to be for a fixed period of time and the member of staff intends to relocate again at the end of their contract term, creating opportunities for new recruits. Whilst there is significant churn of employees, their housing needs are consistent. These members of staff are distinct to other staff members (academics and wider professional and support roles) who are predominantly on permanent / open-ended contracts (86%). The housing needs of these staff are very distinct.
- 4.14 The University's researcher and academic staff members are internationally mobile and highly sought-after by peer Universities. The survey confirmed this and demonstrated that Academics (when early on in their careers) and Researchers are often very 'mobile', which affects their housing choices and requirements. Their mobility and their specialist skills means they have international choice when it comes to employment. Globally, organisations are competing to attract the University's existing talent, who could be incentivised to relocate with the right offer. Similarly, potential future employees will consider carefully whether the opportunity is right for them.

Household Characteristics

- 4.15 Most respondents (64%) were aged between 25 and 44; relatively few respondents were aged under 24 or over 65. Researchers are typically younger (90% are aged under 44), whereas there is a much more varied distribution of ages in the other job roles – academics have an older age profile (60% aged over 54). For academics, their characteristics such as age, alongside seniority of role, household type and permanency of contract, translates into different housing requirements and a different ability to meet housing needs on the open market.
- 4.16 The employee base as a whole is made up of a relatively even split of couples with no children (30%), couples with children (29%), and single person households (26%). There are very small numbers of single parents and people living with family.
- 4.17 There are distinct differences where these household sizes are analysed. Smaller households (singles, sharers, couples) form the majority of those relocating to the City, those who identified they had housing needs that they couldn't meet on the housing market, and those who were assessed as not being able to afford housing on the open market.
- 4.18 When considering trends between researchers, academics, and PST staff, the household formations of different employee groups follows on from trends evident in age. Researchers, who are typically younger, are more likely to be single households (sharers, and single person households) or couple households (without children), meaning they are single income households, and typically earning incomes equivalent to grades 4-9. More than half of employees (54%) reported being part of dual-income households – they are more likely to be PST and academics who are part of larger families or older couples, and have a higher household income.

- 4.19 Regarding tenure, home ownership was significantly higher among those aged over 45 (70%) compared to those aged below (37%). The majority (42%) of younger respondents rented privately, and a further 12% were renting from the University.
- 4.20 The majority of staff live within six postal districts: 41% in 'central' Cambridge and a further 16% spread across North and West Cambridge. When it comes to commuting the University employees with the shortest commute times are researchers and academics, of which more than half are using cycle/scooters and the majority of the remainder walk or take public transport.
- 4.21 Overall, data on household characteristics showed that researchers were more likely to live alone in rented, city-centre accommodation, whereas academics live further out and are more likely to own a home. The results indicate that a unit mix catering for the specific needs of researchers will tend towards smaller, less expensive units within walking or cycling distance of the University.

Key Takeaways:

- Recruitment for Researcher and Academic roles, which are vital for continued growth, is heavily dependent on relocation to Cambridge.
- These employees are highly mobile, meaning they typically require shorter term housing solutions.
- In-migration to Cambridge, both from elsewhere in the UK and from overseas, clearly adds to existing pressures within the Cambridge housing market, and these employees are generally those in greatest need of housing support as they do not know the local market.
- A typical researcher household is single income, aged under 34, on a fixed term contract and grades 4-7. They are likely to be occupying private rented sector housing in the city.

Housing Experience

- 4.22 The 2008 survey evidenced significant dissatisfaction with the quality of housing available on the market in Cambridge and identified a link between dissatisfaction with housing and recruitment.
- 4.23 The 2024 survey asked respondents about housing satisfaction, and also captured views on the availability and affordability of housing in Cambridge this indicated that private renters are the least satisfied of all tenures with only half being satisfied and a third being dissatisfied comparative to homeowners who are most satisfied. Members of staff who are part of dual income households or are within the higher grades of the payscale are significantly happier than single income households – there is less of a sense of stretch when it comes to meeting housing costs.

- 4.24 There is less satisfaction for those who have re-located to Cambridge and sharers – again reinforcing that there is a lack of suitably priced housing to meet the needs of these members of staff. Critically, after owner occupiers, it is those who are renting from the University (72%) who are most satisfied with their housing.
- 4.25 The provision of market homes for sale and good quality homes for rent, which are professionally managed, rented from the University, and priced relative to the grades 4-9 are the housing types which make a significant contribution to housing satisfaction.

Housing Availability

- 4.26 The availability and affordability of housing is long established as being a significant limiting factor on the University's ability to recruit and retain staff and was one of the key drivers for the original decision to invest in housing by the University.
- 4.27 The latest survey confirms that nearly 90% of respondents consider they would find it either 'impossible' or 'difficult' to find a suitable home that meets their needs and is affordable. This is a very significant concern for the University in view of the need for researchers and academics to relocate to Cambridge and for the University to be able to give confidence that this relocation will be feasible – to include being able to find housing that meets their needs.
- 4.28 It is clear that the vast majority of respondents have faced difficulty in securing accommodation that they can afford and meets their needs. The data indicates that the following groups found it marginally harder than the average respondent:
- **Tenure:** private renters face significant challenges when it comes to finding suitable housing on the open market;
 - **Income:** the proportion of respondents who said it would be difficult / impossible to find a suitable home remains high as income increases – indicating there is a shortage of homes at all price points – although those earning at grade 8 and below are more likely to face the greatest challenges; and
 - **Relocation:** those who have re-located to Cambridge for work found it marginally more challenging to find suitable housing.

Housing Affordability

- 4.29 Whilst acknowledged to be subjective and dependent on many factors beyond just housing, the view of a quarter of respondents is that they struggle to afford monthly housing costs. A number of trends could be identified when analysing the data, which can be summarised as:
- **Researchers responded as being the group most likely to be struggling with costs** – this is likely to be linked to their tendency to be occupying centrally-located private rented housing of which there is very limited availability at the lower quartile prices.
 - **Private renting sees respondents feeling most stretched** - this is a further indication of the high cost of private rents and the very limited availability at lower quartile prices.

- **Single income households and those living with family/others face the greatest affordability difficulties** – being part of a dual income household materially changes the affordability of housing.

4.30 The above trends were supported by comments from respondents, many of whom expressed the severity of challenges faced when it comes to housing. Respondents noted that the limited availability of smaller, affordable rental properties is a major barrier to attracting and retaining key staff. Many reported feeling restricted to poor-quality shared housing, or being forced to live far from Cambridge due to cost. It was noted that many staff do not extend their contracts beyond the initial term, citing housing stress as a key factor in their decision not to remain. This has a direct impact on the University's ability to retain talent and undermines the long-term continuity of its research activity. Some example quotes from survey respondents are:

"Affordability and availability are huge factors in whether people come to Cambridge for work and whether they stay - I've known many people under 35 who are unable to find suitable accommodation or get on the property ladder compared to other regions."

"As a foreigner it is absolutely impossible to find private housing other than shared when you first arrive to Cambridge. The only possibility is to get a flat through University such as Eddington. It is extremely stressing..."

"As a single person, I feel like the only realistic housing options are in house-shares in Cambridgeshire. Admittedly, I've not looked at options for a while as it's quite disheartening..."

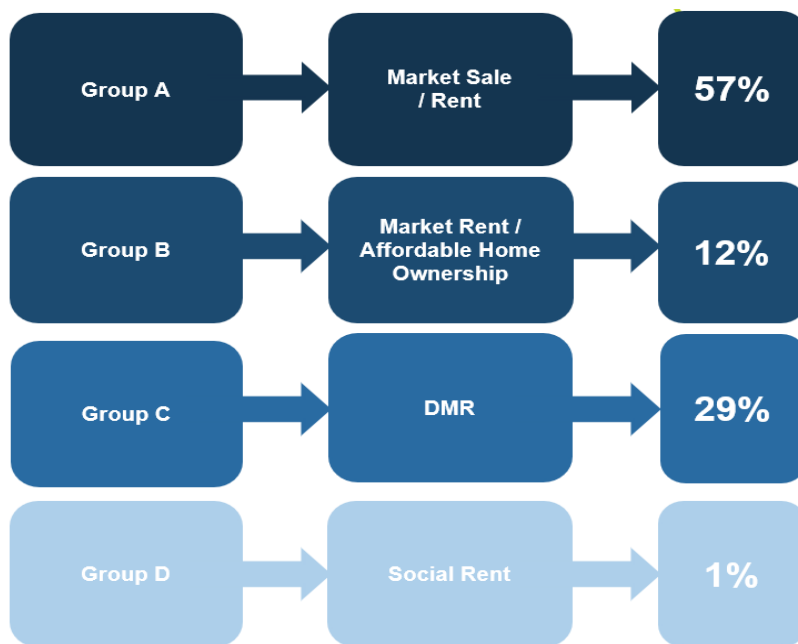
"Cambridge costs, both in terms of renting and buying, are ridiculous. I moved out to CB6 over ten years ago and housing here is gradually becoming less affordable thanks to the Cambridge overspill. I'm very lucky to be living where I am, but there is a real crisis for people younger than me, who face being trapped in expensive and poor rental accommodation, with limited hope of ever being able to buy."

Conclusions on Housing Need

- 4.31 The survey presents a clear picture of housing need – taking into account satisfaction, availability, and affordability – amongst certain groups of University staff. Informed by analysis of the survey data, respondents can be characterised into four broad typologies which have been used to shape the Key Worker housing being provided (See Figure 1 overleaf).
- 4.32 In addition to what the survey shows on where the gaps are in housing need, it also indicates where there are not significant needs: for example Groups A and B, who mostly comprise home owners, have housing needs which can be met through the delivery of good quality market housing across the city to address the shortage of options available to them – these are not a priority for Key Worker housing.
- 4.33 Group C makes up almost one third of respondents – they typically comprise highly mobile staff occupying private rented housing in the city. They cannot afford housing on the open market and they are having the greatest impact on the city's housing market. Availability and affordability in housing is a pressing concern for many, and as a result this poses a serious risk to recruitment and retention of specialist staff, as the extent and range of their needs are

not met by the market. This is the focus for Key Worker housing and comprises nearly one third of the need.

Figure 1: Housing Typologies



- 4.34 Group D comprises a very small proportion of respondents (c.1%) who are households who would be eligible for rental homes at a level of subsidy aligned with social rent and may benefit from the wider support able to be offered by Registered Providers to its tenants. The reality for this group is that even where social rent tenure housing is provided these staff members are very unlikely to be afforded sufficient priority to be allocated homes through the lettings
- 4.35 Group C (29% of respondents) are the Key Workers who are the priority for intervention through the delivery of affordable housing. The primary tenure for these workers is DMR, for which there is no market-led delivery of this type of product – delivery to date has been by the University itself at Eddington. Without direct intervention, the likelihood of this need, critical to the University, being met is very limited.
- 4.36 The availability of homes that are affordable to these households is scarce – most are occupying shared homes or are stretched financially occupying 1-bed homes, with more affordable studio or sharing options being very limited in a format that is suitable to a professional i.e. with a lounge space, private bathroom, sharing with fellow professionals. This group needs affordable rented homes to meet their housing needs. Affordability analysis concludes that the majority could afford a discounted market rent in the range of 60-80% of market.
- 4.37 There is a clear concentration of need for smaller 1 and 2-bed affordable homes, due to the high proportion of single and couple households within this group. The analysis supports a need for 68% of homes to be 1-beds.
- 4.38 The proposed KWH homes at Eddington are well-aligned to meet the clear and pressing need for homes for Group C. University Key Worker Housing provides homes for rent at a discount to market rent specifically for staff employed by Cambridge University and/or its Colleges. These are homes that meet specific identified needs of workers who:

- Are moving to the area who need to be able to have confidence they can find housing;
- Require a short commute and a central location and for whom car ownership is not feasible or less important;
- Who can't afford home ownership;
- Whose tenure of choice is rental; and
- Who have a housing requirement for a limited time frame due to their contract term and who value ease including certainty of costs and potentially furnished accommodation.

Existing Key Worker Housing

4.39 The survey indicates that homes delivered to date are successfully serving their intended purpose, as set out above. The University has delivered 686 homes at Eddington. 320 survey respondents are living in University accommodation. Compared to the overall pool of respondents, they are more likely to be occupied by younger workers who are single or couples, on fixed term contracts and who have relocated from overseas – these are the profile who would otherwise be living in rental homes in the city centre adding pressure onto the already limited private rental stock.

Demand for Housing at Eddington

4.40 Furthermore, the above conclusions are very well reflected in expressions of interest from survey respondents. The survey asked respondents if they would be interested in living at Eddington, both now and in the future, to support the ongoing success of the campus.

4.41 1089 respondents (38%) said they would be interested in living at Eddington, of which 866 are University employees (39%). 595 said it depends, or they don't know. 130 responded 'Other', the majority of whom were either already living there, or would like to but found it too expensive / were limited by not being able to have pets.

4.42 The survey response has been scaled up to estimate the demand for homes from University staff based on an average response of 15% indicated demand from at least **5,400 University employees, potentially up to 9,000.**

4.43 There is generally a high level of interest across all profiles, but predominantly from people who are:

- Researchers and PST staff
- Aged 18-44 (predominantly 25-34)
- Singles, single parents, and sharers
- Currently in private rented accommodation, or are already renting from the University / a College
- Residing in Cambridge city postcodes
- Working at the University for less than 4 years
- Experiencing difficulty with the affordability and availability of housing

- Those who are older, are a couple or family, and/or are occupying academic roles are marginally less likely to be interested in moving.

5 Analysis

Proposals

- 5.1 The Application seeks to deliver c.3,800 homes across the NWCM. The homes will be provided as 50% market and 50% affordable homes, all of which will meet the needs of Cambridge University Key Workers, who are defined as “*staff employed by the University and/or its colleges, which the University accept as a priority for housing having regard to their level of housing need and their contribution to the functioning and success of the University and its colleges, and affiliated organisations*”.
- 5.2 The market and affordable homes will comprise a mix of unit sizes which are provided as ranges to allow for flexibility as the scheme comes forward. The unit size mix of the key worker housing is differentiated from the market housing as the needs evidence has identified very specific requirements.

Table 4: KWH Unit Mix Parameters

Unit Type	Minimum	Maximum	Illustrative Scheme
1 person*	30%	55%	30%
1 bedroom	15%	35%	35%
2 bedroom	10%	35%	32.5%
3 bedroom+	2 %	5%	2.5%

* The 1 person* units comprises either:

- Studio Self Contained Unit
- Studio Community Unit –a combination of self contained private and shared amenity spaces to respond to the specific requirements of University Staff

- 5.3 The core principles of the Key Worker housing to be delivered in the future phases can be summarised as:
- Homes meet the definition of “affordable private rent” within part (b) of the definition of “affordable housing” in the glossary to the National Planning Policy Framework (December 2024) and being provided as purpose-built housing and meeting the definition of a “build to rent scheme” as defined in the glossary;
 - Rents set at a discount to market of at least 20% (including service charges) with this discount being calculated when a discounted home is rented out, or when the tenancy is renewed;
 - In-tenancy rent increases permitted at CPI + 1%;
 - Operated by a BTR operator.

Policy and Guidance

5.4 The proposals for KWH accord with national and local policy, the key points being:

- Meeting the NPPF definition of Build to Rent and Affordable Housing:
 - i.e. it is “*housing for sale or rent, for those whose **needs are not met by the market** (including housing that provides a subsidised route to home ownership and/or **is for essential local workers**” (emphasis added)*
 - Homes will be operated by a professional landlord, and let at rents at least 20% below market rent, and will be affordable in perpetuity;
- Delivery of 50% affordable housing, with the mix to be determined by evidence (including housing need) at the time of the permission (as required by AAP NW6 and NW7) – set out in detail in Section 4 and summarised below.

Assessed Need

- 5.5 The proposals respond to a clear and pressing need identified by the 2024 Key Worker Housing Survey, which identified a significant proportion of University employees (c.30% of respondents) who are the priority for intervention through the delivery of affordable housing. This group typically comprises highly mobile research staff occupying private rented housing in the city. Availability and affordability in housing is a pressing concern for many, and as a result this poses a serious risk to recruitment and retention of specialist staff, as the extent and range of their needs are not met by the market. This group also has the most significant impact on the wider housing market: the influx of demand for private rented housing in the city from people re-locating to Cambridge is significant, putting pressure on affordability and availability of housing for all.
- 5.6 The primary tenure for these workers is DMR, for which there is no market-led delivery of this type of product – delivery to date has been by the University itself at Eddington. Without direct intervention, the likelihood of this need, critical to the University, being met is very limited.
- 5.7 The availability of homes that are affordable to these households is scarce – most are occupying shared homes or are stretched financially occupying 1-bed homes, with more affordable studio or sharing options being very limited in a format that is suitable to a professional i.e. with a lounge space, private bathroom, sharing with fellow professionals. This group needs affordable rented homes to meet their housing needs. Affordability analysis concludes that the majority could afford a discounted market rent in the range of 60-80% of market.
- 5.8 Further, the Key Worker Housing Survey presents a clear need for a mix of housing weighted towards smaller homes. Two thirds of respondents (comprising singles, couples, and people sharing their home with others / family) need a one-bed home. Having regard to the fact that single income households are more likely to require affordable housing, then the KWH need is even more concentrated towards the provision of smaller homes.

6 Conclusion

- 6.1 This document has set out the policy context, evidence base, and benefits of the continued delivery of key worker housing.
- 6.2 The delivery of affordable housing for key University staff, particularly researchers, remains a strategic priority for the University of Cambridge. As demonstrated by the 2024 Housing Needs Survey, researchers face clear and systemic barriers to securing suitable accommodation within the city. These challenges directly impact the University's ability to recruit and retain the highly skilled individuals upon whom its academic and research output depends.
- 6.3 Eddington has proven effective in delivering homes to meet the needs of University Key Workers alongside those of the Institution. The continued provision of this housing¹ will reduce pressure on the local housing market, particularly in the private rented sector, and support broader objectives around housing affordability, sustainability, and the long-term growth of Cambridge University.

¹ Further details and intended locations of which will be fixed as part of RMA submissions.



UNIVERSITY OF
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Appendix

Housing Needs Assessment



Housing Needs Assessment **Eddington**

University of Cambridge

June 2025



01 Approach and Profile

The response rate to the 2024 Housing Survey gives a **high level of confidence** in the findings. The profile of the respondents is **representative** of the overall profile of workers at the University, giving further confidence that the findings give an insight into the overall views of workers into housing in Cambridge and enable the **needs, requirements and concerns of specific groups** to be analysed in greater depth and will be used to inform the scale and nature of key worker housing demand.

Introduction

The 2024 Housing Survey

1. The University recognises the importance of housing to its staff and this affects recruitment, retention, and the quality of life of the University's working community.
2. The Cambridge area is expensive and for workers of the University; this means it can be difficult to find affordable, good quality housing. This is especially the case for newcomers relocating to Cambridge, many of whom are critical to the University's postdoctoral community and are vital to the success of the University. Being able to access the right type of housing is incredibly important to the many new staff that relocate to Cambridge to take up highly specialised research roles that are crucial to Cambridge's reputation globally as a leading research institution. It is essential that Cambridge is a feasible destination for these staff to relocate to, but availability and affordability housing has been a long-established challenge.
3. The University has already directly responded to these concerns, recognising this investment is important in its ability to succeed in its objective of recruiting and retaining the world's leading talent in research and education. Through its own developments, the University is directly responding to and meeting its needs, for example at Eddington, which includes housing specifically to meet the needs of workers. Feedback confirms the key worker homes delivered to date are making a positive difference in meeting the needs of workers – benefiting the individuals, the University, and the city.
4. The University undertook this survey in 2024 with the key objective of ensuring that its continued investment into housing delivery is most impactful for its key workers, its wider growth and global success. The findings of the survey will:
 - Help to ensure the University is better placed to shape housing on those developments it has direct involvement in, specifically Eddington, identifying and filling the gaps in the market recognising the specific needs – for example of postdocs – are very different to wider market needs, and the wider market is not delivering to these needs;
 - Better engage more widely with key stakeholders and other partners on matters relating to housing on behalf of its staff, and in support of the growth of the University across the Greater Cambridge area; and
 - Help understand and provide opportunities to respond to the impact that the University has on housing in the wider area.
5. The survey received 2,897 responses with 86% of respondents completing the survey in full. The survey achieved a response rate of 16% of all University employees, giving a confidence level of 95% and a 1.9% margin of error. The high proportion of respondents choosing to complete the survey in full indicates the interest and importance of housing to employees.





02 Survey Headlines

Analysis of the housing survey responses provides an overall profile and insight into wider experiences of housing. Headline findings highlight emerging themes, which can be then characterised at their highest level into differences between younger, smaller more mobile households and older more established households.

Survey Headlines

Employee Characteristics

Contract Length

63% of all respondents are on permanent contracts. The University has a higher proportion of fixed-term contracts compared to other employers – this is reflective of job role profiles.

Contract Type

89% of respondents are full time, with a higher proportion of university staff full time (90%) than non-university (85%).

Age

c. 65% of respondents are aged 44 and under with a particular emphasis on the ages of 25-44 – very few respondents are under 24 or over 65.

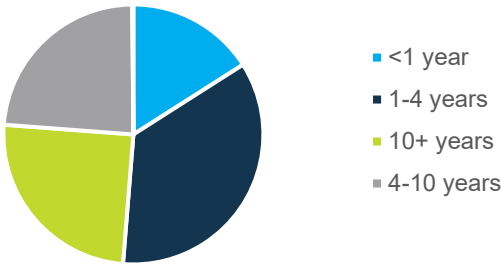
Length of Employment

There are a range of lengths of employment across respondents. Academics typically in positions for a longer period of time (40% >10 years) whilst researchers have been at the University for a shorter amount of time (69% < 4years) reflecting the nature of their roles.

Relocation

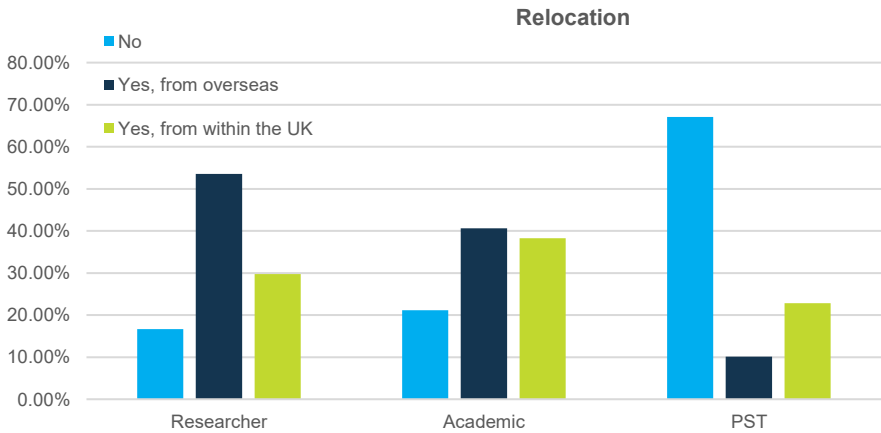
Over half of the survey respondents relocated to Cambridge - comprising 27% relocated from within the UK and 28% relocated from overseas. The University is drawing people to live in Cambridge and relocation is linked to specific job roles which have 'churn' intentionally built in to them notably Academics and Researchers are more likely to have relocated, whilst PST staff are predominantly local to Cambridge.

Particularly early in their careers Academics and Researchers are often 'mobile' affecting their housing choices and requirements. Their mobility and their specialist skills means they have international choice when it comes to employment. Globally, organisations are competing to attract the University's existing talent, who could be incentivised to relocate with the right offer. Similarly, potential future employees will consider carefully whether the opportunity is right for them.



Profile	Respondents
Contract Length	
Permanent	1,207 (56%)
Fixed Term	925 (43%)
Other	18 (1%)
Contract Type	
Full Time	1,924 (90%)
Part Time	210 (10%)
Other	14 (1%)

Age	University
18-24	3%
25-34	33%
35-44	31%
45-54	20%
54-65	12%
65+	1%



Survey Headlines

All Respondents – Household Characteristics

Income

Households with a single income tend to be researchers in grades between 4 – 9. Almost half of respondents are part of dual income households – they are more likely to be academics and PST staff. This helps assess the housing types workers can afford and highlights the material differences in affordability of housing for single households to inform the homes provided at Eddington.

Household Profile

Across all respondents there is a very even split of couples with no children (30%), couples with children (29%), and single person households with no children (26%) – this informs the sizes of homes that are needed. There are very small numbers of single parents and those living with family. Understanding how these household profiles translate into housing need for Key Worker homes at Eddington is important – the right homes must be delivered.

c. 10% of respondents living in a form of shared housing, 7% are sharing accommodation with other people i.e. house shares and a further 3% are living with family.

Tenure

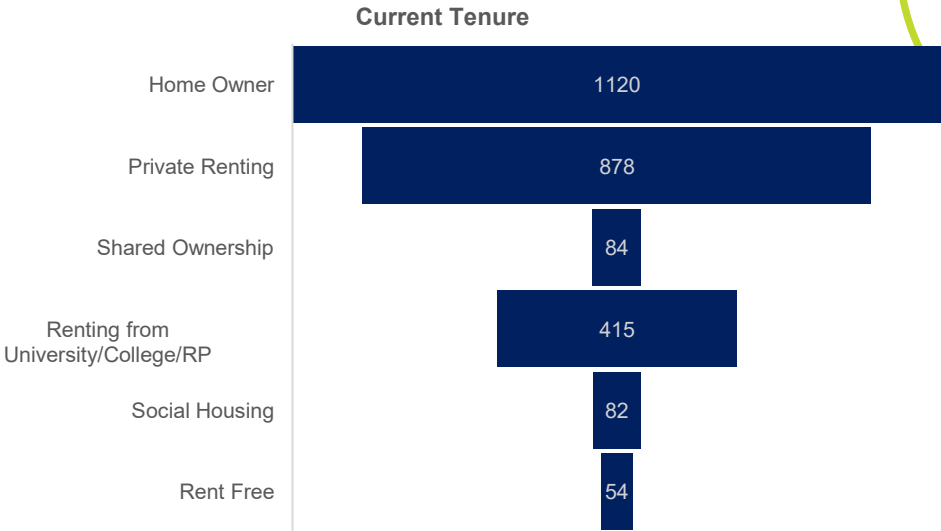
Home ownership is the most common tenure (43%) followed by private renting (33%) – understanding the profile of home owners vs renters and how this relates to housing need is important to shaping the new homes at Eddington.

The University and Colleges are making a meaningful contribution to providing housing for University workers – in terms of scale this is accounting for nearly a third of private rents. Without this contribution, pressure on the private rental stock would be materially higher across the city. Occupiers of these homes are also expressing higher levels of satisfaction than other renters.

Affordable housing (both shared ownership and social housing) is relatively uncommon amongst respondents – just 166 households.

Location

57% of workers live within six postal districts - 41% are in 'central' locations, spread relatively evenly between CB3, CB1, and CB4; and 16% in wider central north / west locations (CB24, CB2 and CB23



Household Type	Respondents
Couple	701 (30%)
Couple with children	690 (29%)
Single	631 (27%)
Sharers	152 (6%)
Single parents	105 (4%)
Living with family	68 (3%)



Survey Headlines

Housing Satisfaction

1. The 2008 survey evidenced significant dissatisfaction with the quality of housing available on the market in Cambridge and identified a link between dissatisfaction with housing and recruitment.
2. The 2024 survey asked respondents about housing satisfaction, and also captured views on the availability and affordability of housing in Cambridge. In analysing housing satisfaction responses from those who are currently living in University / College accommodation have been excluded and analysed separately to understand whether there is a difference in satisfaction through the delivery of housing by the University.
3. The survey has revealed that those currently living in University accommodation are significantly happier with their housing circumstances: 79% said they were satisfied (ranking second only to homeowners). Meanwhile only 51% of private renters – the most likely alternative to University accommodation – reported being satisfied. They are also more comfortable in their ability to afford housing costs: 72% said they were comfortable/ moderately comfortable in their ability to pay rent, falling to 61% of private renters.

4. Excluding those renting from the University / College, there is:

Higher levels of satisfaction is likely to mean less likelihood to be looking for support with housing:

- By dual income and higher income households
- For homeowners
- Where commuting times are shorter
- With age

Lower levels of satisfaction is likely to mean those individuals are more likely to be looking for support with housing:

- By those who have relocated to Cambridge for their roles
- For those renting privately
- For those living in social rent housing
- By single households
- By sharers

Job Role	Satisfied	Indifferent	Dissatisfied
Researchers	61%	15%	23%
PST	69%	9%	24%
Academics	67%	12%	19%
Tenure			
Homeowner	82%	7%	11%
Renting Privately	51%	10%	32%
Renting from the University	79%	17%	11%
Renting from a College	60%	21%	19%
Social Housing	52%	30%	19%
Household			
Sharer	49%	13%	38%
Single	65%	14%	21%
Single Parent	65%	10%	26%
Couple	74%	10%	12%
Couple with children	68%	11%	16%



Survey Headlines

Housing Availability

1. The availability and affordability of housing is known to be a significant limiting factor on the University's ability to recruit and retain staff. This was supported by comments from respondents, many of whom expressed the severity of challenges faced when it comes to housing.
2. 53% of respondents said they would find it difficult to find a suitable home that meets their needs and is affordable. A further 36% said this would be 'impossible'.
3. It is clear that the vast majority of respondents have faced difficulty in securing accommodation that they can afford and meets their needs
4. There are only marginal variations identified by the sub analysis:
 - Tenure:** private renters face significant challenges when it comes to finding suitable housing on the open market.
 - Income:** the proportion of respondents who said it would be difficult / impossible to find a suitable home remains high as income increases – indicating there is a shortage of homes at all price points – although those on lower incomes are more likely to face the greatest challenges.
 - Relocation:** those who have not re-located to Cambridge for work found it marginally less challenging to find suitable housing.
 - Additional Needs:** Those who stated they have a disability (or would prefer not to disclose) face particular difficulties in finding suitable housing.
4. Opinions on availability are supported by analysis of market properties available to rent (table bottom right), showing there is a severe shortage of homes.

Job Role	Possible	Difficult
Researchers	90%	10%
PST	90%	10%
Academics	89%	11%
Tenure		
Homeowner	15%	85%
Renting Privately	6%	94%
Renting from the University	14%	86%
Renting from a College	2%	98%
Social Housing	4%	96%
Household		
Sharer	8%	92%
Single	11%	89%
Single Parent	9%	91%
Couple	10%	90%
Couple with children	13%	87%



Specific Needs

Affordability

The 2024 Survey invited respondents to provide their views on the affordability of housing to meet their needs. Caution is needed with relying on the findings as individuals financial circumstances and views of ability to afford their housing costs will vary considerably and is subjective.

- 1. Researchers responded as being the group most likely to be struggling with housing costs on the open market** – this is likely to be linked to their tendency to be occupying centrally-located private rented housing of which there is very limited availability at the lower quartile prices.
- 2. Private renting sees respondents feeling most stretched** - this is a further indication of the high cost of private rents and the very limited availability at lower quartile prices.
- 3. Homeowners tend to feel most comfortable** in meeting their housing costs – these are households who are more frequently dual income earners and who have the opportunity to access a much wider range and locations of properties than is available in the rental market. Many a mortgage-free or have low monthly costs.

- 4. Social housing tenants are have the most difficulty in meeting their housing costs** – there are a very small number of workers in social housing but it is unlikely that given their affordability difficulties that these tenants will look to move to an alternative tenure.
- 5. Single income households and those living with family/others face the greatest affordability difficulties** – being part of a dual income household materially changes the affordability of housing.
- 6. Those with a disability struggle with housing affordability** – significantly more than those who do not this may also be exacerbated by less availability of housing to meet any specific needs associated with their disability.
- 7. The respondents reporting the greatest affordability difficulties are:**
 - Researchers
 - All rental tenants
 - Single person households and single parents

Tenure	Total Respondents	Ability to Afford Housing Costs	
		Possible	Difficult
Researchers	666	71%	29%
PST	1,130	80%	20%
Academics	299	76%	24%
Homeowner	834	89%	11%
Renting Privately	697	61%	39%
Renting from the University	320	72%	28%
Renting from a College	52	63%	37%
Social Housing	63	55%	45%
Household		Possible	Difficult
Sharer	182	73%	27%
Single	561	69%	31%
Single Parent	93	53%	47%
Couple	591	83%	17%
Couple with children	573	77%	23%



Survey Headlines

Views of University Workers

Respondents were invited to provide comments about housing, highlighting the scale and severity of the problem for the University's employees:

"Affordability and availability are huge factors in whether people come to Cambridge for work and whether they stay - I've known many people under 35 who are unable to find suitable accommodation or get on the property ladder compared to other regions. Even when we were looking to buy in and around Cambridge 10 years ago, it was extremely difficult and we only secured our house due to some unexpected good luck. It should not have to be that way in a wealthy area."

"As a foreigner it is absolutely impossible to find private housing other than shared when you first arrive to Cambridge. The only possibility is to get a flat through University such as Eddington. It is extremely stressing..."

"As a single person, I feel like the only realistic housing options are in house-shares in Cambridgeshire. Admittedly, I've not looked at options for a while as it's quite disheartening..."

"Cambridge costs, both in terms of renting and buying, are ridiculous. I moved out to CB6 over ten years ago and housing here is gradually becoming less affordable thanks to the Cambridge overspill. I'm very lucky to be living where I am, but there is a real crisis for people younger than me, who face being trapped in expensive and poor rental accommodation, with limited hope of ever being able to buy."

"Cambridge has no option for renting on your own. Even the few studio flats around are completely unaffordable. I've shared for 8 years but I'm tired of it, I'd like a place to call my own, but in Cambridge that's just impossible. I can't live in a rented bedroom or in my partner's flat all my life. There needs to be more options for people who would just like to have their own space, even small!"

"Cambridge house shares are incredibly expensive. Of the two house shares I've lived in, the landlords have been terrible - the first refused to fix a silverfish infestation which I believe was bad enough to be illegal, and refused to send on mail when I moved, instead telling me to give my address to an old flatmate who I felt unsafe around. My current landlord refuses to put locks on the bedroom doors, despite repeated requests. I can't afford to buy any kind of housing, or rent anything better. I also can't afford a car, so am reliant on public transport and walking."



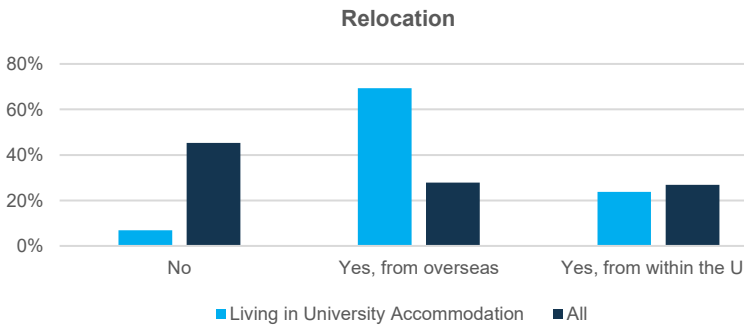
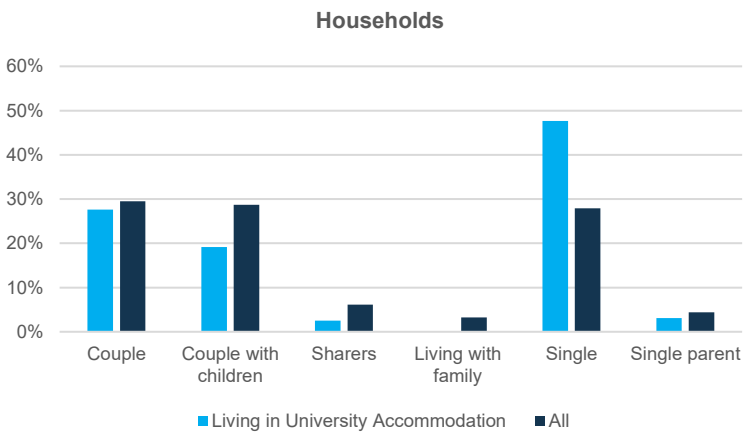
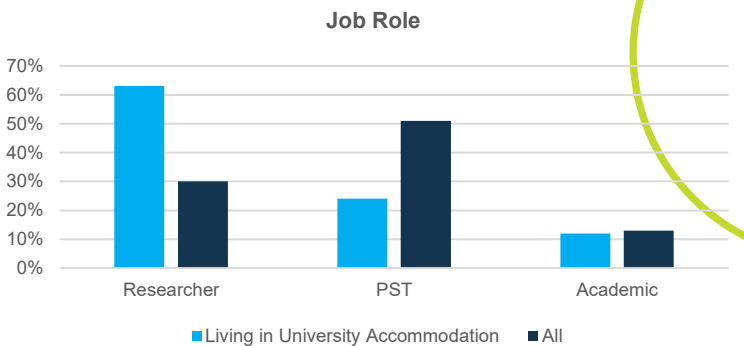
Housing Need

University Key Worker Housing – Critical to Meeting Need

1. The survey identifies a very significant need for discount market rent housing and provides overwhelming support for increased delivery, recognising this is not a product that the market is delivering.
2. University Key Worker Housing provides homes for rent at a discount to market rent specifically for staff employed by Cambridge University and/or its Colleges. These are homes that meet specific identified needs of workers who:
 - Are moving to the area who need to be able to have confidence they can find housing
 - Require a short commute and a central location and for whom car ownership is not feasible or less important
 - Who can't afford home ownership
 - Whose tenure of choice is rental
 - Who have a housing requirement for a limited time frame due to their contract term and who value ease including certainty of costs and potentially furnished accommodation
3. The homes delivered to date are successfully serving their intended purpose. The University has delivered 686 homes at Eddington. 320 survey respondents are living in University accommodation. Compared to the overall pool of respondents, they are more likely to be occupied by younger workers who are single or

couples, on fixed term contracts and who have relocated from overseas – these are the profile who would otherwise be living in rental homes in the City Centre adding pressure onto the already limited private rental stock.

4. The growth of the University continues to be centred around its research function and as such, the recruitment of researchers is vital to its' future, and consequently it was anticipated that contract research staff would form a significant proportion of key worker housing occupants. The 2024 survey revealed that researchers – if not already in University accommodation – are likely to be renting privately, are less satisfied with their current housing situation compared to academics and PST staff. This reaffirms the importance of the delivery of Key Worker housing – its effective in meeting a need but there is not currently enough of it.



Survey Headlines

Informing Analysis

Individual

High proportion of full-time workers

Most respondents are aged 25-44

A high proportion of workers relocate for their roles

Fixed term contracts bring intentional churn

High proportion of roles in Grades 4-9

Academics and researchers are highly mobile

Workers are concentrated in Central and Central North Cambridge

Households

More than half of households have dual incomes

Sustainable transport choices are made when live centrally

Less than one third of households have children

43% are homeowners – not considered a priority need

A third of households rent privately

Very low proportion live in traditional affordable housing

Housing

The University and Colleges are boosting rental supply

Satisfaction of University and College Rented homes is high

Sharer households have specific requirements and needs

Need for better value, better sized, and better quality homes

Availability of housing is a significant challenge



Housing Need

Typologies

Informed by analysis of the survey data, respondents can be characterised into four broad typologies based on their housing needs, requirements, affordability and circumstances:

Group A

- Predominantly families, and some couples, typically aged over 35+
- Higher proportion of dual income households
- On permanent contracts, occupying academic or PST positions
- Originally from the Cambridge area, or have relocated originally but are well established generally having been in their roles for more than 4 years
- High proportion of homeowners and a greater proportion of households that are living further from the city centre happy to commute in for work
- High levels of housing satisfaction and comfortably able to afford their housing costs
- More settled in their housing circumstances as a result of the above but may still face difficulties finding suitable housing to meet their needs

Group B

- Singles and couples or young families
- A mixture of local / established and relocating / transient employees, meaning there is a greater diversity of housing requirements
- A mix of home owners and private renters who are living both close to and further from the city with a mix of commuting patterns
- Higher levels of housing satisfaction and more comfortably able to afford their housing costs
- Availability of housing presents a difficulty in finding suitable accommodation

Group C

- Single income households comprising singles, sharers, and single parents and some younger less established couples
- A focus of staff within grades 4-9
- Generally younger – below 34 years
- Predominantly researchers along with some PST staff
- More transient employees on fixed-term contracts with a high proportion who have relocated to Cambridge for work
- Higher proportion of renters – in the private sector and from the University/Colleges generally living closer to the city centre
- Less settled in their current housing situation, experiencing lower levels of housing satisfaction, and more likely to be struggling with housing costs
- Those already living in University accommodation report higher levels of satisfaction and ability to afford housing

Group D

- A diverse mix of household types encompassing single, couples and families
- A spread of ages, with circa half aged 25-44.
- Most likely to be PST staff in permanent roles
- Generally from the Cambridge area
- Likely to be privately renting
- Experiencing challenges with their living costs even where in existing Affordable Housing



Housing Need

Correlating Typologies and Tenures

Tenures have been assigned to each of the four categories:

Group A are households for whom affordability of housing is not a primary concern and whose needs can be addressed by market housing.

This group are likely to be owner occupiers but may also choose to rent privately.

Group B - availability and affordability of housing is a concern for many; this category includes workers who have relocated to Cambridge from elsewhere in the UK.

They are able to make a decision to not take up a role at the University if there is a significant concern in relation to their access to suitable housing; there is a risk to recruitment and retention of specialist staff if these needs are not able to be met on the housing market.

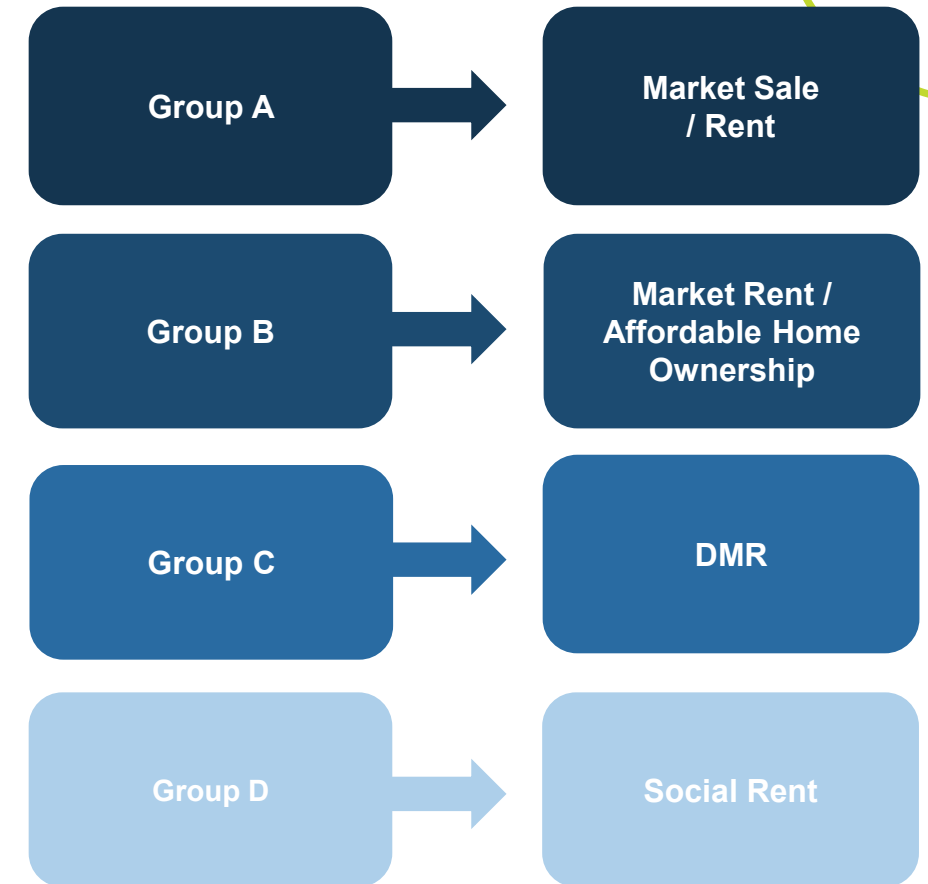
This group are likely to be initially preferring to rent, progressing to home ownership where they decide to remain longer term in the Cambridge area and will require a range of rental pricing including discounts to market rent or potentially affordable home ownership.

Group C shares many of the characteristics of Group B but with a strong preference for rent albeit they can not afford private rents. The risk to the University is greater as these are households for whom affordability is further stretched and comprises a high proportion of Researchers.

The availability of homes that are affordable to these households are even scarcer, with more affordable studio or sharing options being very limited in a format that is suitable to a professional i.e. with a lounge space, private bathroom, sharing with fellow professionals.

This group require homes to rent at a discount to market rent but not with the depth of discount necessary for social rent.

Group D are households who require rental homes at a level of subsidy aligned with social rent and may benefit from the wider support able to be offered by Registered Providers to its tenants.





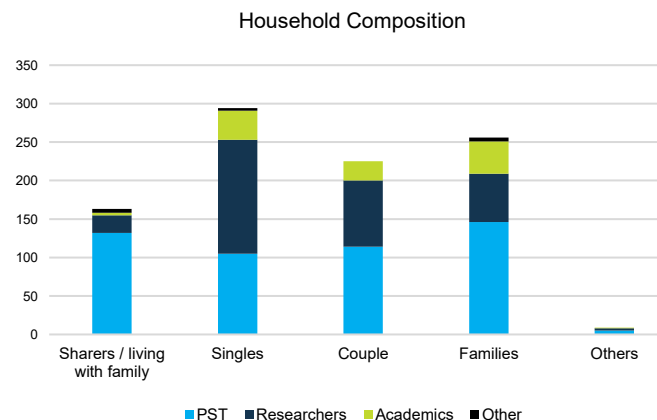
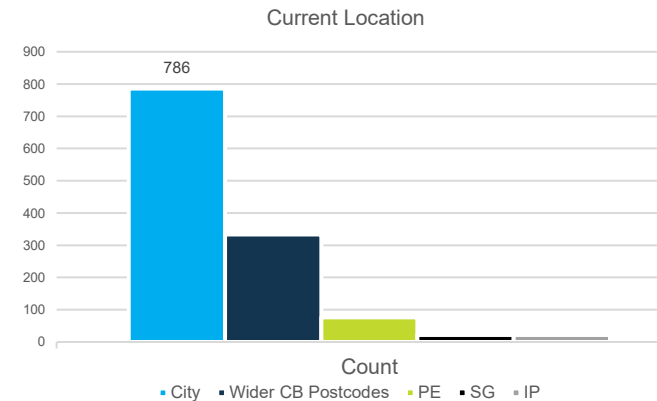
05 Priorities for Eddington

The profile of survey respondents who expressed interest in living in Eddington has been analysed to inform how the University can best shape the housing proposals at Eddington, identifying and filling the gaps that are not met by the market.

Interest in Eddington

- One objective of the survey was to assess demand from University workers for housing at NW Cambridge, both now and in the future, to support the ongoing success of the campus.
- 1089 respondents (38%) said they would be interested in living at Eddington, of which 866 are University employees (39%). 595 said it depends, or they don't know. 130 responded 'Other', the majority of whom were either already living there, or would like to but found it too expensive / were limited by not being able to have pets.
- The survey response has been scaled up to estimate the demand for homes from University staff based on an average response of 15% indicated demand from at least **5,400 University employees, potentially up to 9,000**.
- There is generally a high level of interest across all profiles, but predominantly from people who are:
 - Researchers and PST staff
 - Aged 18-44 (predominantly 25-34)
 - Singles, single parents, and sharers
 - Currently in private rented accommodation, or are already renting from the University / a College
 - Residing in Cambridge city postcodes
 - Working at the University for less than 4 years
 - Grades 4-9
 - Experiencing difficulty with the affordability and availability of housing
- Those who are older, are a couple or family, and/or are occupying academic roles are marginally less likely to be interested in moving.

Interest in Eddington	All Respondents	University Employee Respondents	Scaled Up Demand
Yes	1,089	866	5,393
It depends / don't know	595	455	2,952
'Other'	130	109	652
Total	1,814	1,430	8,997



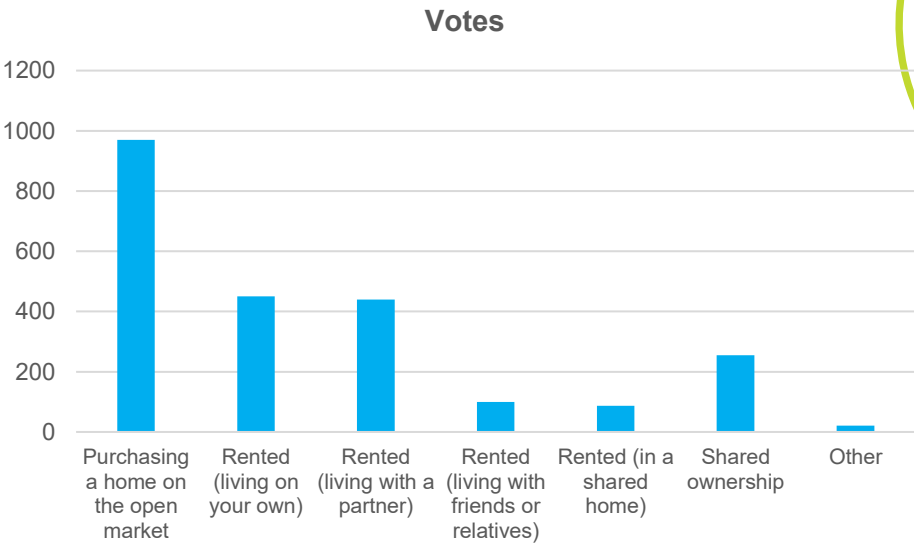
Group	Respondents Interested	as a % of total
Researcher	475	71%
Academic	171	57%
PST	750	66%
Single	427	72%
Single Parent	70	74%
Couple	401	64%
Couple with Children	378	62%
Sharers	95	73%
Living with Family	41	65%
Working <1 year	244	72%
Working 1-4 years	545	72%
Working 4-10 years	332	65%
Working >10 years	303	57%
Home Owner	477	57%
Shared Ownership	36	54%
Private Rent	540	77%
Rent from the Uni / College	285	76%
Rent from Council	40	63%
Permanently Rent Free	5	50%
Temporarily Rent Free	15	71%



Housing Requirements

- 1. Respondents indicated what tenures they would consider if they were to move home. There is almost equal level of interest for home ownership and renting (either as an individual, or with a partner / friends / others)*.
- 2. The affordable housing requirements is similar to that of all respondents analysed in the previous section. Circa 41% of those who expressed interest would require some form of affordable rent, of which a very small number need Social Rent (2%). Analysis shows that Discounted Market Rent (in the region of 60-80% of market) would be appropriate for the vast majority of those requiring some form of affordable housing.
- 3. Analysis of household size indicates need is concentrated amongst smaller homes, as singles and couples make up the majority of respondents. However, it is recognised that the need for 1-bed homes will be slightly overstated, as couples may want more room to live/work or start a family. This is reflected in the respondent preferences, which shows a relatively equal spread, albeit to a slightly greater extent for larger homes.

Tenure	1-Bed	2-Bed	3-Bed	Total
Social Rent	1%	0%	0%	2%
DMR	29%	6%	5%	39%
Market Rent / Aff. Home Ownership	6%	1%	1%	7%
Market	32%	9%	11%	52%
Total	68%	16%	16%	100%



* Respondents were able to select more than one tenure. The question did not relate specifically to moving to Eddington.

Facilities and Amenities

Respondents who expressed interest in Eddington were asked to indicate their priority facilities and amenities.

Respondents value:

- 1. Flexible tenancy lengths
- 2. Superfast Wi-Fi
- 3. Laundry facilities
- 4. Part-furnished
- 5. Green space

This indicates that potential future residents are seeking accommodation set in a nice environment, with practical amenities that support the importance and transient nature of their work.

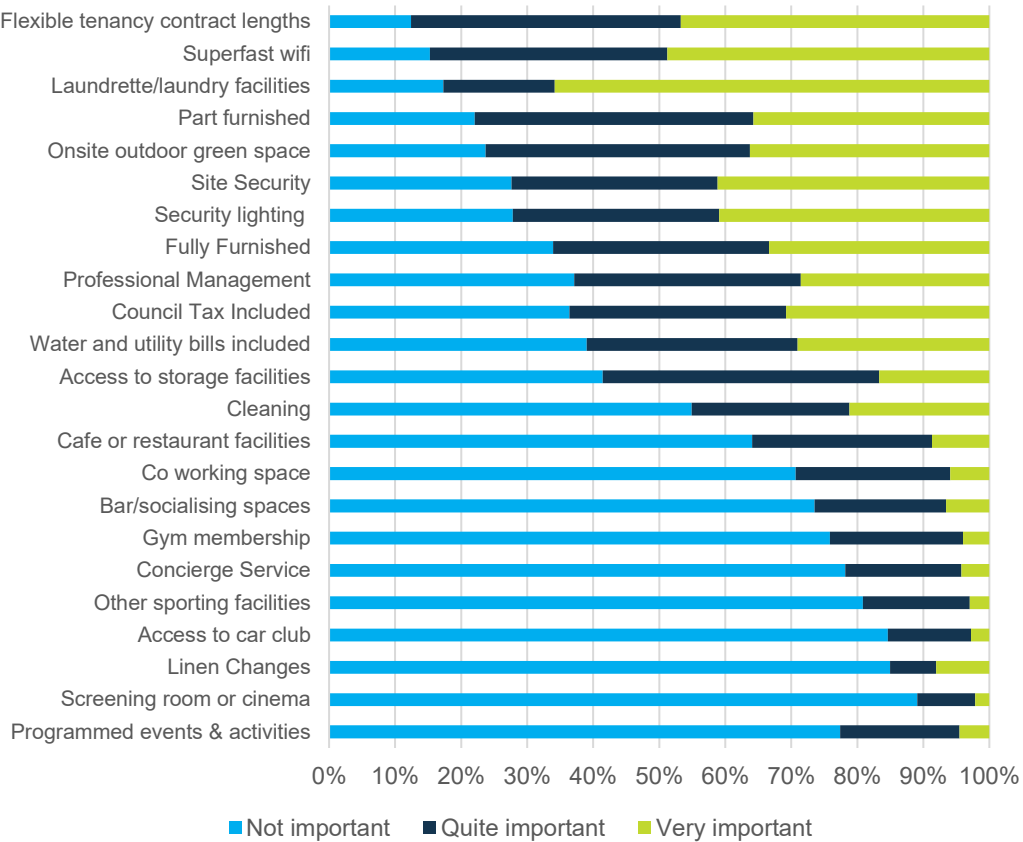
Bills included, security, storage, and cleaning are considered secondary to the above, but still important to more than half of respondents.

Premium type amenities, such as gym memberships, car clubs, and cinemas are considered less important than core amenities and simplicity of tenure (i.e. bills included), although residents may still choose to opt in to such offerings.

C. 750 respondents are open to the idea of sharing. Their opinions on shared spaces are as follows:

Space	Happy to Share	Private Preferred
Bathroom Ensuite	67	675
Working Space	185	531
Kitchen	232	504
Dining and Eating Space	296	439
Lounge / Social Area	330	397

Amenity Preferences



The Impact of University Housing

The provision of good quality and affordable housing at Eddington can have far reaching benefits, which can be summarised as:

For employees -

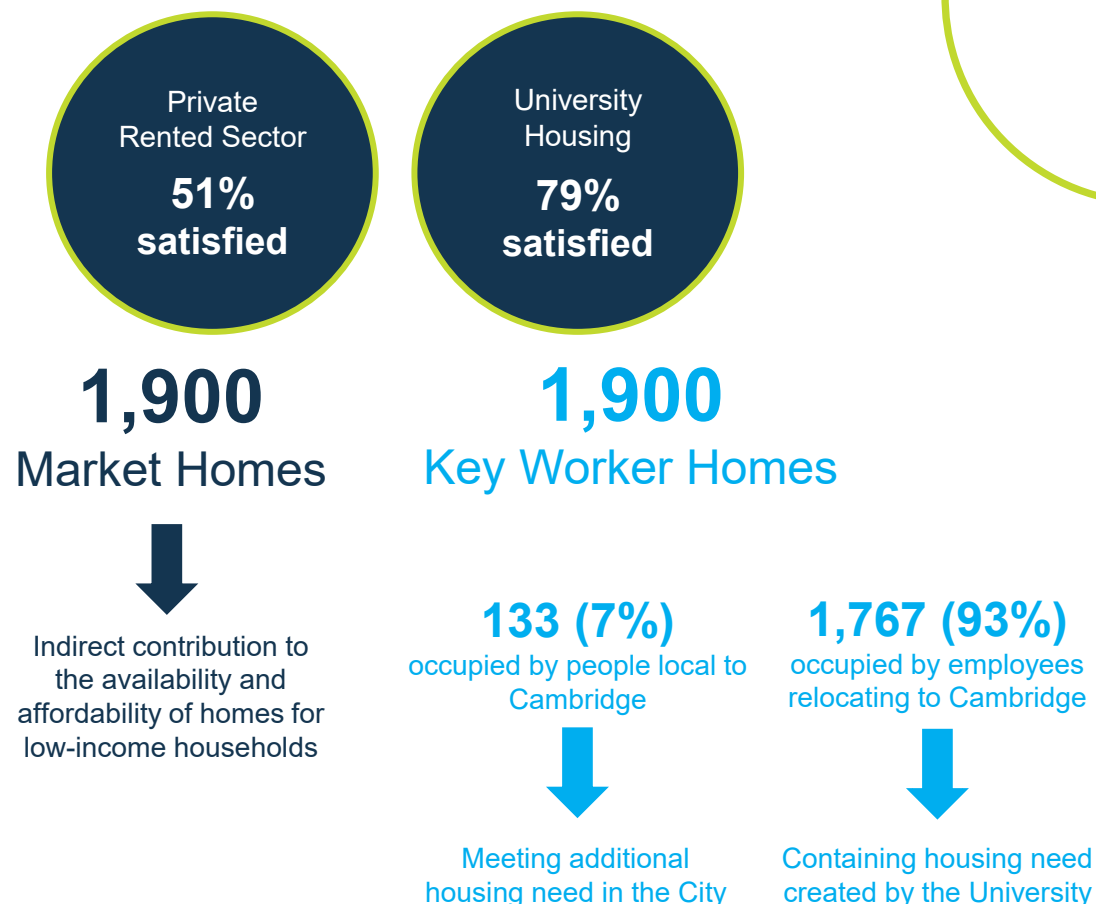
- A meaningful impact on the quality of life for key workers; the survey has revealed that those occupying University accommodation are happier with their living circumstances and are able to afford their housing costs more comfortably;
- Those for whom the University accommodation is suitable for, but are not able to secure tenancies due to supply, are living in private rented housing in the city.

For the University -

- The provision of housing dedicated for key workers will be instrumental in securing the University's long-term success and position on a global stage. The University is ranked as one of the top five global establishments based on its research capabilities. Eddington will provide the living and research accommodation needed to enable the University to continue to grow its research capabilities and maintain its global position so it can attract the best students and staff.

For the city of Cambridge and its residents -

- Where staff are recruited from outside the Cambridge area, a failure to meet the housing needs that the University has created results in significant additional pressure in the local housing market (concentrated within the private rented sector), leading to a shortage of available housing and upwards pressure on prices for all. The delivery of housing for key workers mitigates some of this pressure on the local market, freeing up housing for local people.
- The provision of housing will serve the continued growth of the University and maintenance of its status as world-class institution, in turn contributing to the long-term growth and prosperity for the local, regional, and national economy through increased spending power and spin-off business operations and investment.



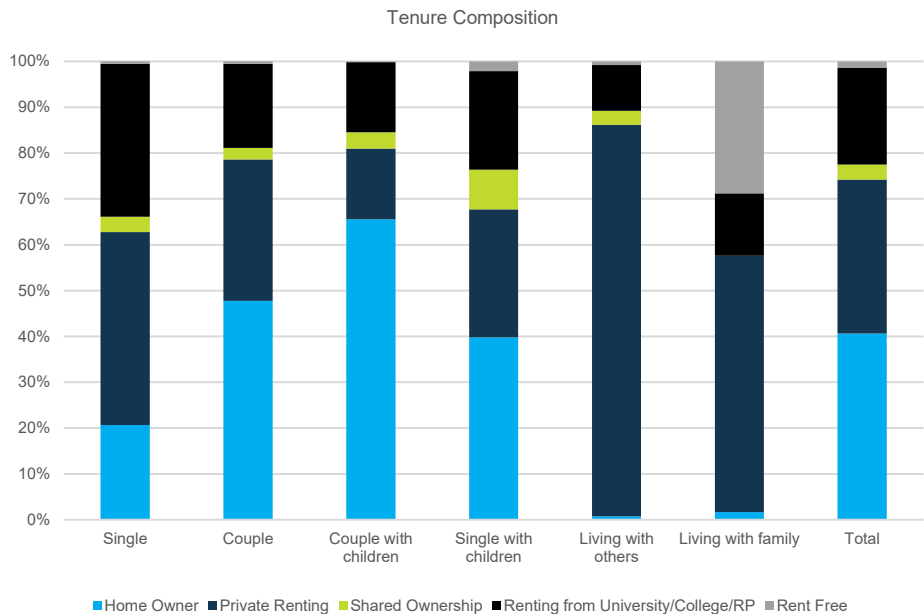


06 Conclusions

Conclusions

Housing Need

- 1. This report provides an overview of the findings of the staff survey conducted in November - December 2024. 2,897 responses were received, of which 80% were employed by the University, which equates to a response rate of 16%. There was good employee representation across job roles, ages, and incomes; the data is considered statistically reliable.
- 2. Availability of housing is a concern for the vast majority (89%) of respondents, which has been confirmed by separate market analysis. This is felt most acutely by those renting their homes.
- 3. Affordability of housing is also a concern, most notably for single person households and sharers and / or private renters.
- 4. Respondents can be characterised into four categories, each with different housing needs:



Group	Household	Housing Circumstances	Housing Requirements
A	Families and couples earning dual incomes, occupying permanent academic / PST positions. Originally from Cambridge or relocated but not recently.	High proportion of homeowners. Affordability is not a primary concern. Their needs can be addressed by market housing.	Market Sale / Rent
B	Couples, single, and young families, earning mid-level incomes. A range of job roles / contracts, and a mixture of established and transient employees.	A mix of home owners and private renters. Market rent is affordable, but market sale housing is out of reach. Availability is also a concern.	Market Rent / Affordable Home Ownership
C	Mostly younger, single income households grades 4-9. Predominantly researchers, and some PST staff. More transient employees on fixed-term contracts who have relocated to Cambridge for work.	Higher proportion of renters – in the private sector and from the University/Colleges. Affordability is stretched and availability of homes that are affordable are scarce.	Discounted Market Rent
D	A diverse mix of household types encompassing single, couples and families who are earning low incomes. Most likely to be PST staff, originally from the Cambridge area.	Struggling to rent privately, or are already occupying affordable housing. They are experiencing the greatest challenges with their living costs.	Social Rent



Conclusions

Eddington

1. The growth of the University continues to be centred around its research function; the recruitment of researchers is vital to its' future. The survey revealed that researchers – if not already in University accommodation – are likely to be renting privately, are less satisfied with their current housing situation compared to academics and PST staff. Those who are currently living in University accommodation are significantly happier with their housing circumstances, and are more comfortable in affording their housing costs.
2. The results of the survey, supported by market analysis, shows a clear and pressing need for both market and affordable housing in Cambridge. Most importantly, there is a wide gap in the market between market rent and social housing (where many researchers find themselves); this is a key contributing factor to the recruitment issues the University is facing.
3. The above reaffirms the importance of the delivery of Key Worker housing – its effective in meeting a need but there is not currently enough of it. Filling this gap is the biggest opportunity for the University in terms of its own development, through the delivery of Discounted Rent homes to meet needs of young researchers, who are private renters looking to look in close proximity to the city and / or their place of work.
4. Eddington offers an opportunity to deliver housing that is: in a good location; high quality; well managed; on the right terms; the right size; flexible, allowing for moves within the community if needs change and with the right amenities. The size of homes needed is weighted towards smaller units: 66% of respondents are couples or single person households (including sharers).

Tenure	1-Bed	2-Bed	3-Bed	Total
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