

## **2 IDENTIFYING THE SPATIAL EXTENT OF THE SUB-REGIONAL HOUSING MARKETS**

2.01 In order to undertake meaningful analysis of the housing market in the HPDD Sub-Area, it is first necessary to establish the boundary of the sub-regional housing markets and the spatial extent of any smaller housing markets which operate within and across it. It is also important to establish the functional linkages the area has with adjacent housing and labour markets.

2.02 Determining the spatial extent of the housing market area is the first step in the HMA process, as set out in the current draft Housing Market Assessment Guidance. It is important, therefore, to ensure that there is a common understanding of what is meant by the term 'the housing market'. Once this is understood it is possible to explain what is meant by the sub-regional component of the phrase 'sub-regional housing market'.

### **Definition of Sub-Regional Housing Markets**

2.03 In economic terminology a market is where buyers and sellers come together to exchange goods or services at an agreed price. The price mechanism is the means by which demand and supply are brought into balance. Excess demand will result in prices being bid up. Excess supply will mean that prices fall until buyers are found for the goods or services.

2.04 The housing market is a particularly complex market for a variety of reasons:

- First, housing is a high value commodity. Purchases by individuals are typically financed over a long period of time. The decision to purchase is therefore of great importance to individuals and subject to the influence of the cost of capital – interest rates;
- Second, housing is both a consumer good and an investment good. A consumer good is one that people buy to derive immediate benefits from – a pleasant place to live, a roof over their head. An investment good is bought to provide a financial return;
- Third, because housing is built to last, at any point in time only a fraction of the total stock of housing nationally is 'on the market' – that is, available for sale. Typically in any year around 10% of the stock of housing may change hands, and new supply (newly built homes) comprises at most only 10% of total sales in any year (that is 1% of the total stock) (Communities and Local Government, 2007);
- Fourth, the housing market is highly regulated. The location and volume of new development is controlled through the town planning system. Minimum quality standards are set for new building and existing housing;
- Finally, because shelter is a basic human requirement, considerable resources are provided to ensure that those who cannot afford market housing are adequately housed either through direct provision of housing (council or housing association homes) or subsidy (Housing Benefit).

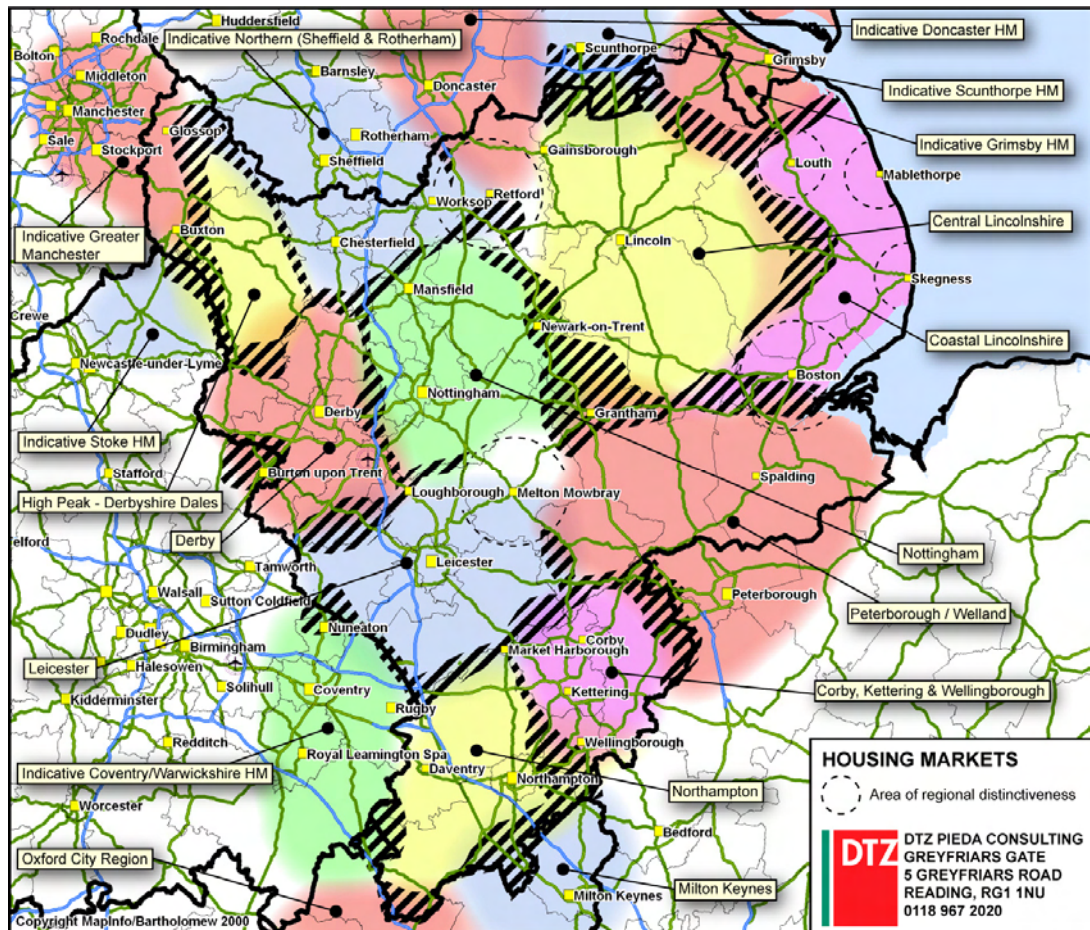
2.05 The final dimension that distinguishes the housing market from many product markets is that it has a strong spatial dimension. Location matters. Thus, while it is possible to talk of a national housing market and regional housing markets, in practice most buyers seek to move within the same sub-region because they wish to continue to live in that general area because of their sense of belonging, their family or broader social relationships, their jobs or access to particular services – most notably particular schools.

- 2.06 Typically, one expects a sub-regional housing market to comprise an area in which some 70% of all household moves are contained, excluding long distance moves which are associated with a major lifestyle change – for example a change in the place of work, retirement to a different part of the country, or a decision to share accommodation with a partner who is located in a different part of the country. This sub-regional market is likely to cover an area that falls, at least partly, in the administrative area of a number of local authorities.
- 2.07 There are a number of other ways to think about the likely extent of sub-regional housing markets. The area of the sub-regional housing market will map onto the area of search considered by the majority of households when looking to move home – not ignoring the fact that many people will confine their search to a much more localised area or have limited choice to move further afield. However, the fact that certain socio-economic groups may have more limited choices is a characteristic of the housing market and not something that determines the boundaries of the sub-regional housing market.
- 2.08 One would also expect a close relationship between the boundaries of sub-regional housing markets and sub-regional labour markets – generally referred to as Travel to Work Areas (TTWA). TTWAs delineate the areas within which at least 70% of the workforce in employment live and work. Across the East Midlands around 67% of all households contain people who are in work, and unless these people are taking up a job in another location outside an acceptable journey time, they are likely to look for somewhere to live within the same travel to work area if they move home. With regard to the HPDD Sub-Area, 59% of jobs in the whole Output Areas, and 70% in the Output Areas which were, wholly or partly, in the National Park, were filled by residents according to the 2001 Census of Population.
- 2.09 Below the sub-regional level there are local housing markets. For example, smaller towns have their own housing market characteristics, as will particular parts of larger towns and cities. Such areas can achieve a high level of self-containment because many household moves are of relatively short distance. Rural areas also have their own market characteristics, although rural areas in the Peak Sub-Region are almost certainly functionally part of sub-regional housing markets based on large centres of employment – cities or towns.

### **The Peak Sub-Region Housing Market**

- 2.10 DTZ identified the spatial extent of sub-regional housing markets within the East Midlands in March 2005. (See Figure 2.1) This exercise identified ten housing markets within the region. We concluded that the majority of the area of the Borough of High Peak and District of Derbyshire Dales comprised a single housing market, (see Figure 2.1) and that it made sense for a single HMA to be undertaken for both the Districts, while acknowledging that parts of the Districts might fall into adjacent housing markets. The delineation of the housing market was informed by analysis of a range of data across the whole of the East Midlands, focussing on district level analysis.
- 2.11 This analysis has informed the review of the boundaries of the *sub-regions* identified in the draft Regional Spatial Strategy (RSS). However the RSS definition of the Peak Sub Region designates the Peak Sub-Region as one which comprises the district of Derbyshire Dales, the Borough of High Peak, *and those parts of* Peak District National Park outside Derbyshire Dales and High Peak Districts. The Peak -Area, as defined in the draft RSS, is approximately 1,939 square kilometres in area and had a population of 165,700 people in 2001.

**Figure 2.1: Spatial Delineation of the Sub-Regional Housing Markets in the East Midlands. (Source: DTZ)**



2.12 The conclusions of this previous region-wide analysis are worth revisiting. This HMA can analyse the evidence base more thoroughly than we were able to do in the 2005 study. It looks at data at a more detailed spatial level to establish the degree to which Derbyshire Dales and High Peak operate as a single sub-regional housing market and the extent of the housing and economic relationship with adjacent markets (such as neighbouring districts, the rest of Derbyshire and the East Midlands).

## Detailed Analysis of the HPDD Sub-Area Housing Markets

- 2.13 Detailed analysis of household and travel to work movements between and within the two districts in the HPDD Sub-Area and the surrounding area is presented in this section. We also consider the movements into and out of the wards that comprise the best fit of the Peak District National Park.
- 2.14 Data from the 2001 Census at ward level has been used for the initial analysis of household<sup>1</sup> movement and travel to work patterns. Given the relatively small size of the urban settlements within the HPDD sub-area, it has not been possible to combine wards – therefore all of the analysis has been undertaken at ward level.
- 2.15 We have mapped the pattern of household and travel to work movements between each of the wards in the HPDD Sub-Area and those between the urban centres using the ward level definitions shown in Figure 2.2. All of the analysis is derived from the 2001 ONS special migration statistics.
- 2.16 The Peak District National Park is shown in relation to the HPDD sub-area in Figure 2.2, and is clearly an important feature of the Sub-Area covering two thirds of the land area (and is the place of residence for 19.6% of those living in the sub-area). The map also shows that there are significant areas of the National Park outside of the HPDD Sub-Area with just over 60% of the National Park (87,100 hectares) falling within either Derbyshire Dales District and High Peak Borough.
- 2.17 The data on migration and commuting is now seven years old. Consequently, although the general trends are still relevant and reveal relationships between the various urban and rural areas, it should be noted that recent and proposed growth in areas surrounding the HPDD sub-area should be looked at in terms of the implications for the housing markets and travel to work patterns in the future.

<sup>1</sup> Census 2001 Migration Statistics are based on people movements not households though we use this as a proxy for household migration

### Key Points

- There is little migration between the two component districts of the HPDD sub-area; migration between High Peak and Derbyshire Dales accounted for 300 of 8,500 overall household moves according to the 2001 Census
- Levels of in migration and out migration are virtually the same
- Some 21% of in migrants are from three neighbouring metropolitan local authority areas: Tameside, Stockport and Sheffield (the former two especially, less from Sheffield)
- The same three local authority areas stand out as important destinations for out-migrants, with neighbouring Amber Valley also being a reasonably important destination
- Migration is “localised” - virtually all Greater Manchester movements are to/ from neighbouring High Peak (most of which are movements between Glossop and Tameside, and New Mills and Stockport), and most internal migration along short distances
- Travel to work patterns correlate with migration patterns – that is to say:
  - There is little cohesion between the two Local Authority areas
  - There is significant net out commuting, mostly from High Peak to the Greater Manchester area, suggesting that as people move out to the HPDD sub-area, they retain their jobs and commute
  - Not surprisingly, there is very little travel to work movement from Derbyshire Dales to Greater Manchester, with this area relating more to hinterlands to the south and east
  - Greater Manchester and Sheffield are key out-commuting destinations for people in the Peak National Park

The analysis confirms the 2005 regional level mapping which indicated that a significant part of the High Peak District is functionally part of the Manchester housing market, and that other parts on the edge of the HPDD are similarly strongly influenced by the surrounding urban centres. These influences have probably increased since 2001.

However this does not undermine the validity of undertaking the HMA for the HPDD because of its special character, linked to the National Park. Recently published maps of Travel to Work Areas, based on detailed analysis of the 2001 Census, also show that in 2001 there was still a self-contained Buxton TTWA and a self-contained Matlock TTWA.

The analysis does indicate however, that the east and the west of the HPDD have very similar issues, and it makes sense to formulate a common policy. In strict terms the area does not have a unified housing market, with stronger ties to proximate urban settlements to east and west than within the area. The existence of two travel to work areas covering the majority of the area confirms this.



## Household Movements

- 2.18 The pattern of household (people) movement is the primary factor that needs to be considered in determining the spatial extent of sub-regional housing markets.
- 2.19 Approximately 8,500 households moved from one location to another within the HPDD sub-area in 2001. However, there is relatively limited migration between the two districts that comprise the HPDD sub-area. An estimated 200 households moved from High Peak to Derbyshire Dales, with around 100 moving in the other direction over the period.
- 2.20 The flows between the two districts in the HPDD Sub-Area and other districts present a very broad-brush picture of movement. Tables 2.1 and 2.2 present the in and out-flows from the HPDD sub-area in the year preceding the 2001 Census of Population. In-migration into the HPDD sub-area was almost identically matched by out-migration, with a flow of 6,100 households (to the nearest hundred) in either direction.
- 2.21 In terms of the largest outflows, the four districts of Tameside, Sheffield, Stockport and Amber Valley each attracted 300 migrants from the HPDD Sub-Area and together represent 20% of all out-migration from the HPDD sub-area. However, relative to the overall population of the HPDD sub-area (159,000 persons), the level of migration to any one district is relatively small.
- 2.22 Similar to out-migration, 21% of in-migrants come from Tameside, Stockport or Sheffield with Amber Valley being a smaller source of in-migrants. Tameside and Stockport are clearly the largest source of in-migrants.
- 2.23 An interesting feature of almost all the migration trends is that districts outside the HPDD sub-area interact almost exclusively with only one of the districts within the HPDD sub-area, reflecting the relatively localised migration from the HPDD Sub-Area. For example, 300 persons migrated out of the sub-region to Tameside, with over 95% of those coming from High Peak. Similar trends are experienced for Stockport, Macclesfield and Manchester. The districts that have attracted similar levels of migrants from both districts are Sheffield and to a lesser extent, Staffordshire Moorlands.

**Table 2.1: Absolute Household Migration Movements Between Districts (Out-Migration from HPDD Sub-Area) (Source: ONS 2001)**

	All Migration out of districts	Tameside	Sheffield	Stockport	Amber Valley	Derby	Manchester	Chesterfield	North East Derbyshire	Derbyshire Dales	Macclesfield	East Staffordshire	High Peak	Leeds	Staffordshire Moorland
HPDD Sub-Area	6,100	300	300	300	300	200	200	200	200	200	200	200	100	100	100
		6%	5%	5%	4%	4%	4%	4%	3%	3%	3%	3%	2%	2%	2%
Derbyshire Dales	3,100	*	200	*	300	200	100	200	200		*	200	100	100	*
		*	6%	*	9%	7%	2%	6%	5%		*	5%	5%	3%	*
High Peak	3,000	300	100	300	*	*	200	*	*	200	100	*		*	100
		11%	4%	9%	*	*	6%	*	*	6%	5%	*		*	3%

\* = less than 50 persons

**Table 2.2: Absolute Household Migration Movements Between Districts (In-Migration to HPDD Sub-Area) (Source: ONS 2001)**

	All Migration into districts	Tameside	Stockport	Sheffield	Macclesfield	Amber Valley	Manchester	Derby	High Peak	North East Derbyshire	East Staffordshire	Derbyshire Dales	Chesterfield
HPDD Sub-Area	6,100	500	400	300	200	200	200	200	200	200	200	100	100
		8%	7%	6%	4%	3%	3%	3%	3%	3%	3%	2%	2%
Derbyshire Dales	3,100	*	*	200	*	200	*	200	200	100	200		100
		*	*	8%	*	6%	*	6%	6%	5%	5%		4%
High Peak	3,000	500	400	100	200	*	200	*		*	*	100	*
		16%	14%	4%	7%	*	6%	*		*	*	5%	*

\* = less than 50 persons



- 2.24 Figure 2.3 presents the household migration of 25 or more people between wards. The Figure illustrates the limited scale of migration within the HPDD Sub-Area compared with the neighbouring districts. Within the HPDD Sub-Area, household migration is very localised and there is very little migration of any scale to or from wards that are outside of the HPDD Sub-Area or outside of individual settlement areas. The main exceptions to this being relatively localised migrations between towns that lie on the boundary of the HPDD sub-area, namely between Glossop and wards on the fringe of Tameside, New Mills and Wards in Stockport and Ashbourne and a ward in Staffordshire.
- 2.25 The key localised movements are within the main settlements in the HPDD Sub-Area, with significant movements within Glossop, Buxton, New Mills, Chapel-en-le-Frith, Matlock and Ashbourne. However, given the distance between these towns there is no clear movement within this threshold between the settlements.
- 2.26 Figure 2.4 shows the migration levels, limited to flows between wards either into or out of the HPDD sub-area at a lower threshold of people (15 persons). This presents a more revealing picture of migrations across the HPDD sub-area. The finer grain analysis reveals some movements within the HPDD sub-area that are not captured when analysing larger flows.
- 2.27 Migration flows to and from wards outside the HPDD sub-area are limited even when looking at these smaller flows. However, there is some migration apparent between the HPDD Sub-Area and other parts of Derbyshire, such as to Ripley and the Belper area. There also appears to be a significant flow into the area of the HPDD sub-area on the outskirts of Uttoxeter from farther afield. When considering a lower number of household movements, Bakewell also joins the towns identified in paragraph 2.25 as a focal point for localised movements. There also appears to be localised movements within the area of the National Park that includes Hathersage, Hope Valley and Tideswell.
- 2.28 Migration flows of between 15-25 persons highlight flows between settlements, such as between wards in Buxton, Chapel-en-le-Frith and New Mills.

Figure 2.3: Household Movements between Wards, All Movements ≥ 25 People (Source: ONS 2001)

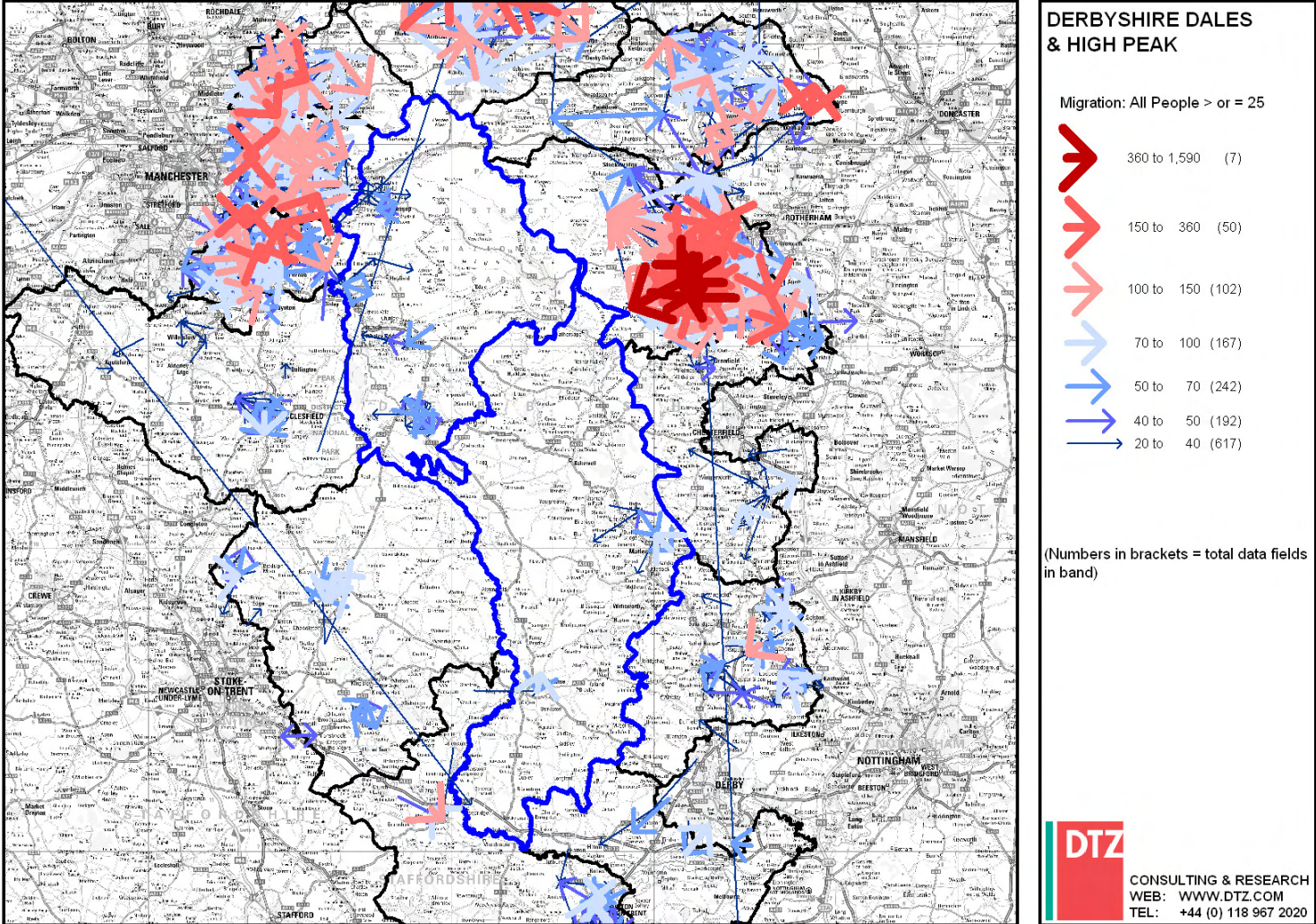
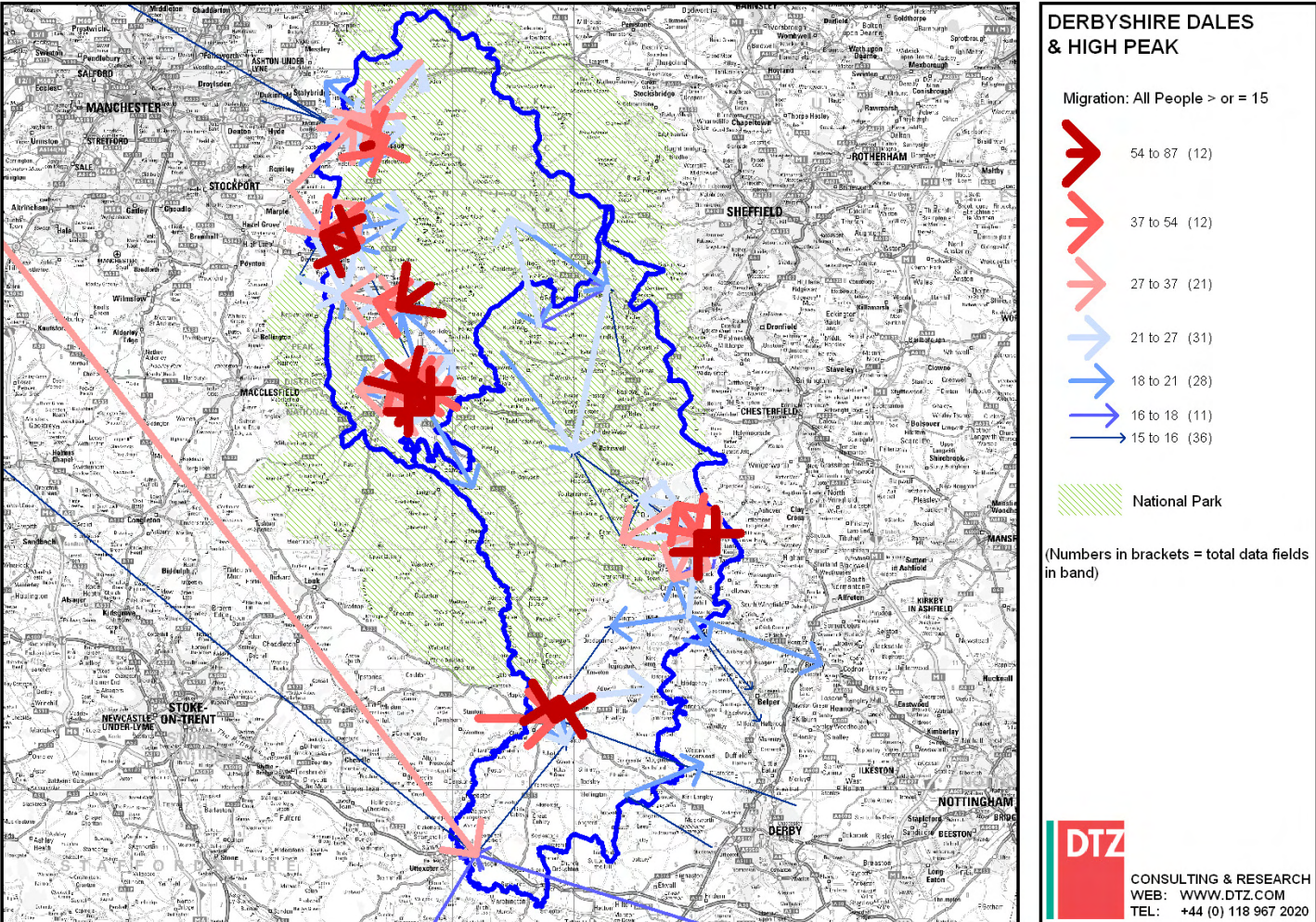


Figure 2.4: Household Movements between Wards, Movements to or from wards in HPDD Sub-Area  $\geq 15$  People  
 (Source: ONS 2001)



### Travel to Work Movements (Census 2001)

- 2.29 The commuting patterns of residents in the area and those commuting to the area provide further evidence of the spatial extent of the housing market. This analysis helps to corroborate what is observed in terms of the household movements and also reveals some slightly different relationships in certain areas.
- 2.30 There are 50,100 persons who work and live in the HPDD Sub-Area. However, notably, there is a “internal churn” of just 2,100 commuters between the two constituent local authority areas (1,300 from High Peak to Derbyshire Dales and 800 from Derbyshire Dales to High Peak). An estimated 11,600 people live and work in the wards that comprise the National Park.
- 2.31 Tables 2.3 and 2.4 present the district level commuting data for the HPDD Sub-Area. The tables illustrate that on the day of the 2001 Census of Population, 26,700 people commuted out of the HPDD Sub-Area to work, while 14,300 people commuted into the HPDD Sub-Area. This highlights that there is significant net out-commuting from the HPDD Sub-Area, which is particularly significant for High Peak (-11,200), but much lower in Derbyshire Dales (-1,200). High Peak has higher levels of out-commuting than Derbyshire Dales, but a lower level of in-commuting, reflecting High Peak’s strong relationship with Greater Manchester (the destination of over two-thirds of commuters).
- 2.32 In terms of out-commuting from the HPDD Sub-Area, the strongest flows are to major conurbations Manchester (3,800), Stockport (3,800), Tameside (3,100), Sheffield (2,300) and Derby (2,000). However, there are also some significant flows to neighbouring more rural districts such as Amber Valley and East Staffordshire. Similar to the migration flows, the out-commuting from within the HPDD Sub-Area to each of these is highly concentrated from only one of the constituent districts. For example, almost 100% of commuting to districts in Greater Manchester travel from the High Peak area. Likewise, commuting to other parts of Derbyshire is primarily from Derbyshire Dales.
- 2.33 In terms of in-commuting within the HPDD Sub-Area, the inflows are much smaller, with the main source of commuters being Amber Valley (1,800), Chesterfield (1,500), Tameside (1,400), Stockport (1,100) and Derby (1,000). Similar to out-commuting, where there are significant inflows from a district, these are predominantly to only one of the districts in the HPDD sub-area.
- 2.34 In terms of net flows, there are net inflows to the HPDD Sub-Area from districts within the rest of Derbyshire (with the exception of Derby), while there are significant outflows to the major conurbations that neighbour the HPDD sub-area. These outflows, particularly from High Peak to Greater Manchester, have contributed to the district being included within the Manchester City Region. This relationship was picked up in DTZ’s mapping of sub-regional housing markets undertaken for the Regional Assembly in 2005.
- 2.35 Although the National Park has net out-commuting of an estimated 4,300 persons, the net commuting between the National Park and other parts of the HPDD sub-area is relatively balanced (3,000 persons in either direction). Greater Manchester and Sheffield, along with other parts of the HPDD Sub-Area, are the main destinations for out-commuters

**Table 2.3: Absolute Commuting Movements between Districts (Out-Commuting from HPDD Sub-Area) (Source: ONS 2001)**

	All Commuting out of districts	Manchester	Stockport	Tameside	Sheffield	Derby	Macclesfield	Amber Valley	Chesterfield	High Peak	Derbyshire Dales	Trafford	East Staffordshire	Salford	North East Derbyshire
HPDD Sub-Area	<b>26,700<sup>2</sup></b>	3,800	3,800	3,100	2,300	2,000	1,600	1,300	1,300	1,300	800	700	700	<b>500</b>	<b>500</b>
		14%	14%	12%	9%	7%	6%	5%	5%	5%	3%	3%	3%	2%	2%
Derbyshire Dales	<b>11,400</b>	100	100	*	1,600	1,900	100	1,300	1,100	1,300		*	700	*	400
		1%	1%	*	14%	17%	1%	11%	10%	11%		*	6%	*	4%
High Peak	<b>17,400</b>	3,700	3,700	3,100	700	100	1,600	100	200		800	700	*	500	100
		21%	21%	18%	4%	1%	9%	1%	1%		5%	4%	*	3%	1%

\* = less than 50 persons

**Table 2.4: Absolute Commuting Movements Between Districts (In-Commuting to HPDD Sub-Area) (Source: ONS 2001)**

	All Commuting into districts	Amber Valley	Chesterfield	North East Derbyshire	Tameside	Derbyshire Dales	Stockport	Derby	High Peak	Sheffield	East Staffordshire	Staffordshire Moorland	Macclesfield
HPDD Sub-Area	<b>14,300<sup>3</sup></b>	<b>1,800</b>	<b>1,500</b>	<b>1,500</b>	<b>1,400</b>	<b>1,300</b>	<b>1,100</b>	<b>1,000</b>	<b>800</b>	<b>800</b>	<b>800</b>	<b>600</b>	<b>600</b>
		13%	10%	10%	10%	9%	8%	7%	6%	6%	6%	4%	4%
Derbyshire Dales	<b>10,200</b>	1,800	1,300	1,400	*		*	1,000	800	600	800	400	*
		18%	13%	14%	*		*	10%	8%	6%	8%	4%	*
High Peak	<b>6,200</b>	*	100	100	1,400	1,300	1,100	*		200	*	200	600
		*	2%	2%	23%	21%	18%	*		3%	*	3%	10%

\* = less than 50 persons

<sup>2 3</sup> The total for the HPDD sub area does not match the sum of the two constituent authorities, as it excludes the “internal churn” within the HPDD sub area of commuting between the two authorities

- 2.36 Economic and labour market linkages across the HPDD Sub-Area are reflected in the pattern of travel to work movements. Figure 2.5 shows the origin and destination of travel to work patterns between all wards and urban areas that involve more than 100 movements. This threshold has been introduced in order to strip out minor movements and to help establish a clearer picture of the main movements.
- 2.37 As with the migration flows, this map illustrates that the number of commuter movements within the HPDD sub-area is relatively small when compared with the level of commuting that is taking place within the surrounding districts. However, unlike the migration flows, there are some significant localised movements, described in the paragraphs below, both between areas within the HPDD Sub-Area and also to areas outside the HPDD Sub-Area.
- 2.38 In terms of flows out of the HPDD sub-area, wards in Glossop and Whaley Bridge exhibit strong commuting patterns to Greater Manchester and there are some commuting patterns apparent from Castleton and Hathersage to Sheffield and a flow into Ashbourne from North Staffordshire.
- 2.39 Within the HPDD Sub-Area, there are significant flows into the main towns – Glossop, New Mills, Chapel-en-le-Frith, Buxton, Matlock and Ashbourne. There is also some commuting between these settlements, most notably between:
- Chapel-en-le Frith and Buxton;
  - Whaley Bridge and Chapel-en-le Frith;
  - Whaley Bridge and New Mills;
  - Wirksworth and Matlock;
  - Bakewell and Matlock.
- 2.40 Figure 2.6 presents a more detailed picture of commuting patterns with the threshold of movements reduced to 40 persons. At this level, the linkages with areas outside of the HPDD Sub-Area become more apparent. In addition to the trends illustrated in Figure 2.5, this figure illustrates:
- The draw of Matlock from a range of locations within Derbyshire;
  - The draw of Derby from Matlock and Asbourne in particular.

Figure 2.5: TTW Movements, in the area surrounding and including the HPDD Sub-Area  $\geq 100$  People (Source: ONS 2001)

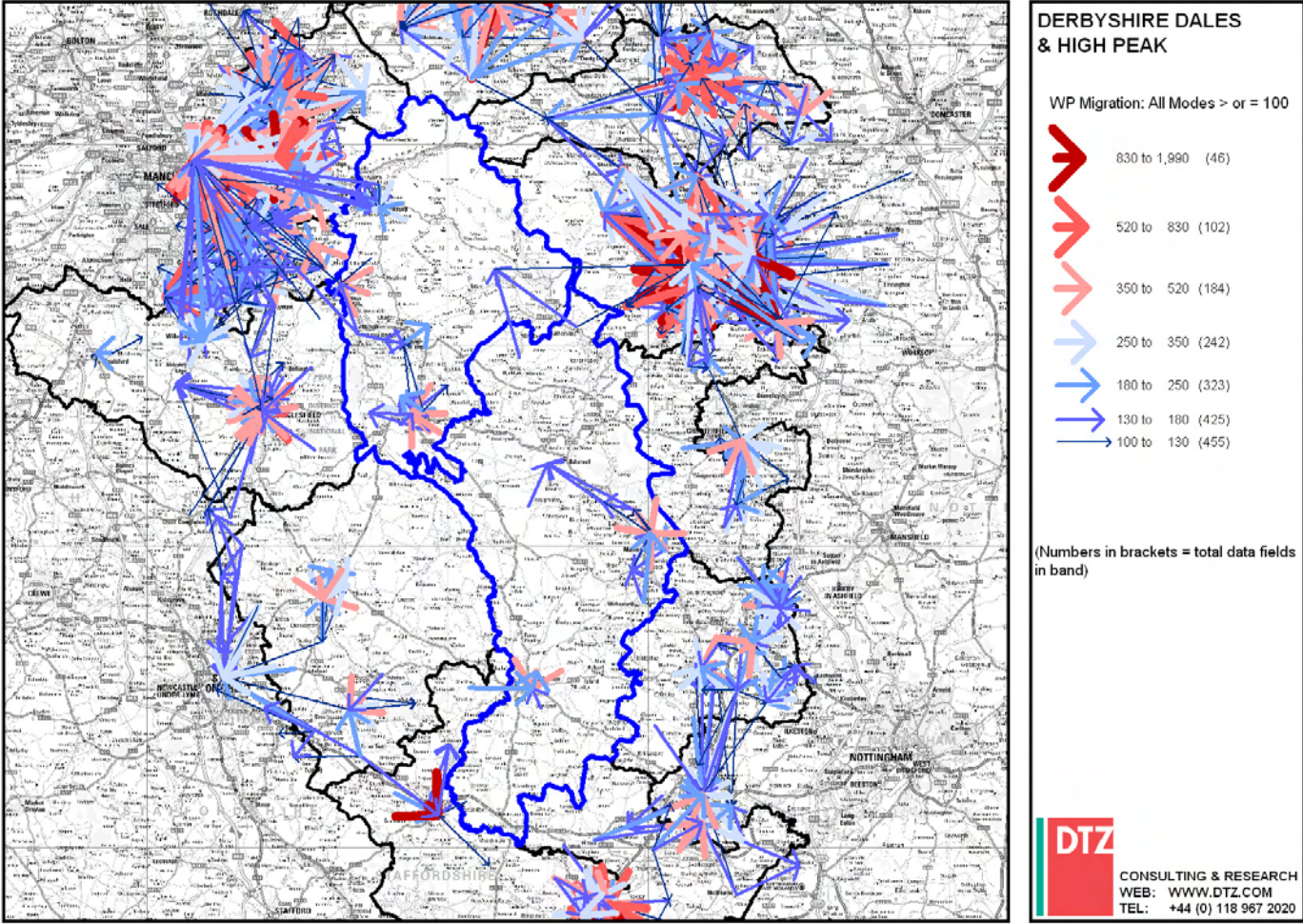


Figure 2.6: TTW Movements across the HPDD Sub-Area, ≥ 40 People (Source: ONS 2001)

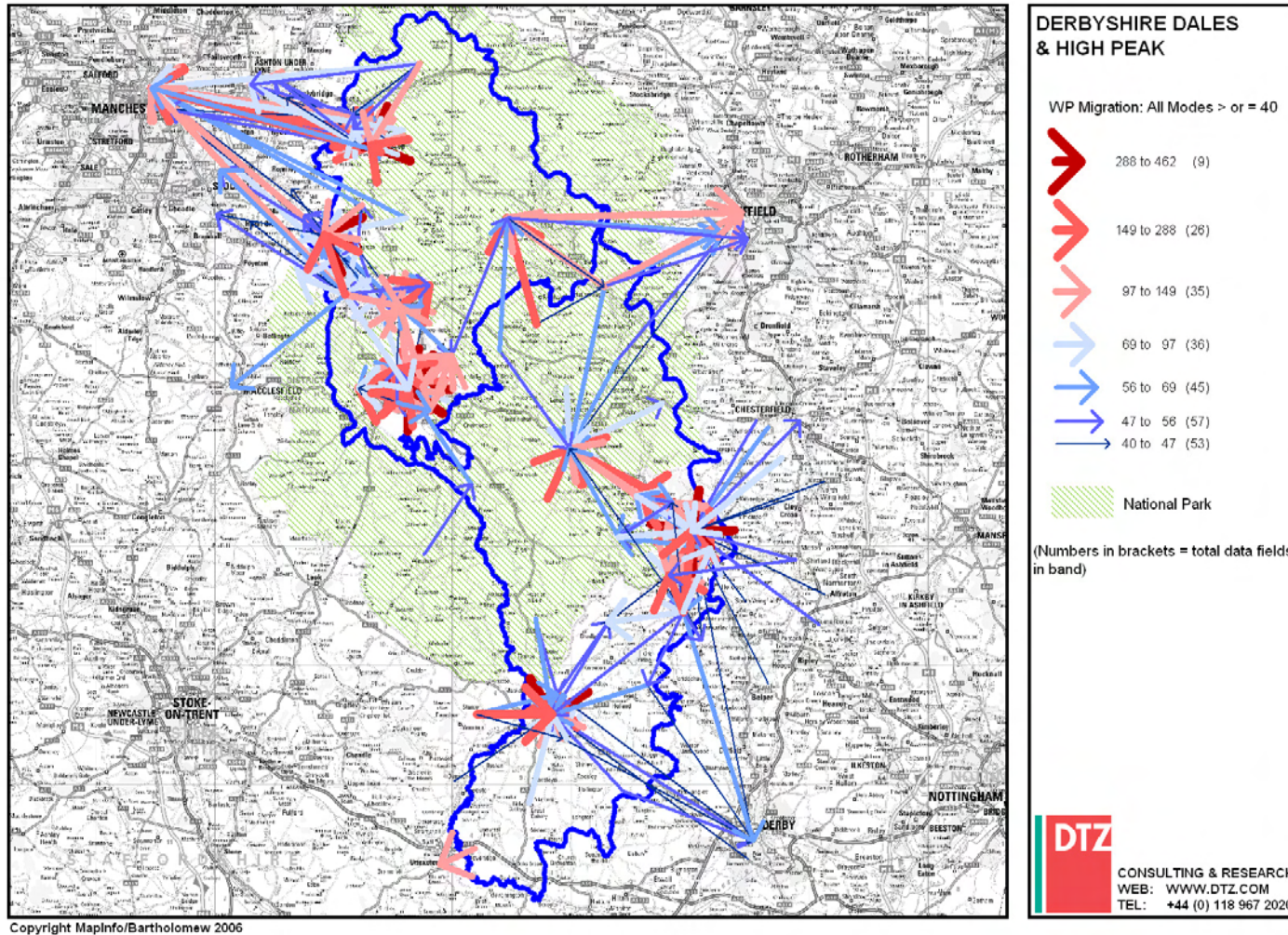
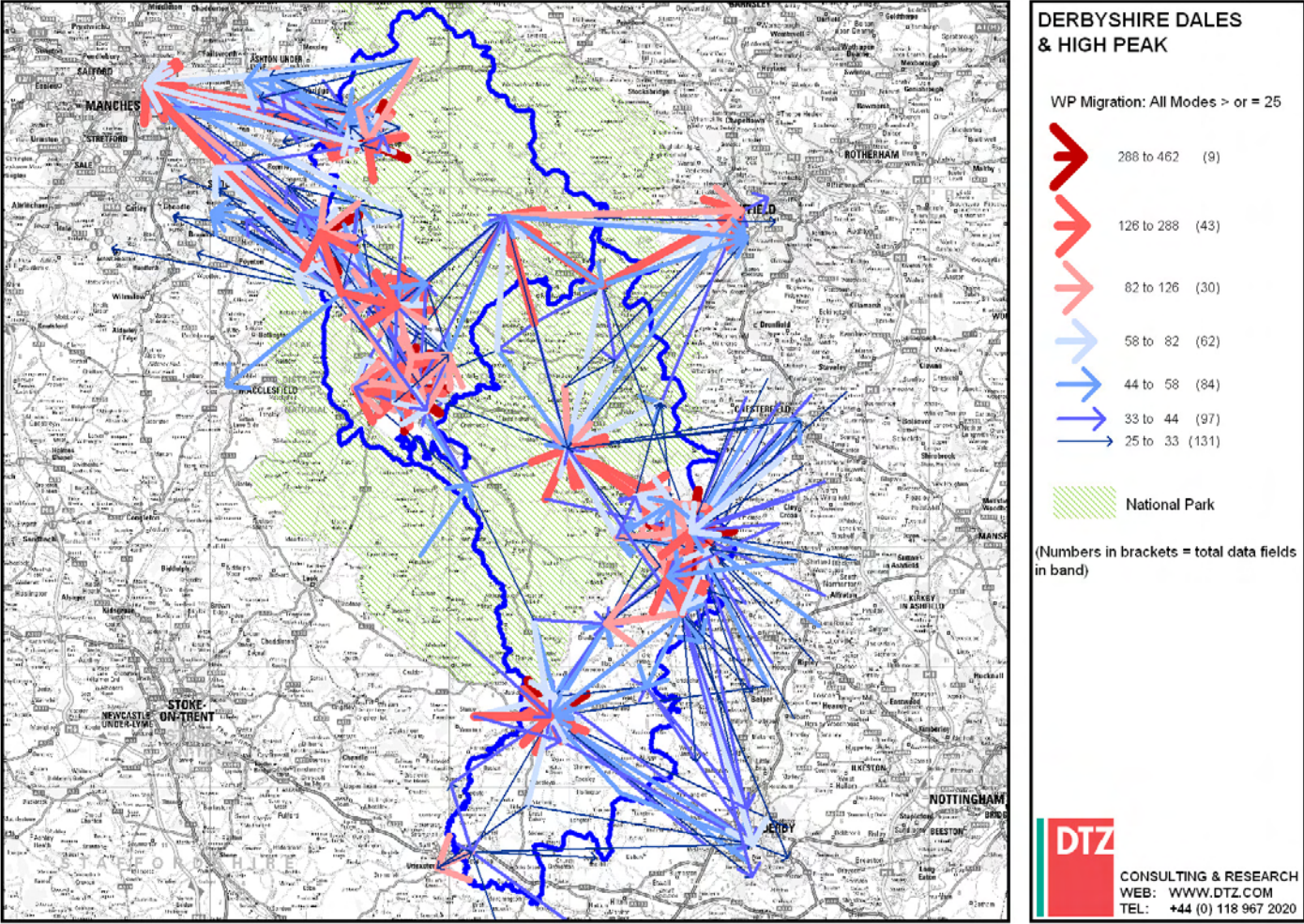




Figure 2.7: TTW Movements across the HPDD Sub-Area, ≥ 25 People (Source: ONS 2001)



## Implications of the analysis for this SHMA

- 2.41 The analysis presented in this section confirms that it is sensible to undertake an HMA for the HPDD Sub-Area, despite the fact that the larger settlements which are located around the fringe of the HPDD Sub-Area often have quite strong housing labour market relationships with adjacent areas. These relationships were identified in DTZ's 2005 study for the Regional Assembly and is reflected in the mapping prepared for that study. The reason why it is sensible to undertake an HMA for the HPDD Sub-Region is because of the commonality of the housing context and the policy environment associated with the designation of a large area of the two Districts as a National Park and the influence this exerts on settlements not in the Peak Park.
- 2.42 Household migration is dominated by local moves relating to the main settlements of the HPDD sub-area, primarily Glossop, New Mills, Chapel-en-le-Frith, Buxton, Matlock and Ashbourne. Bakewell also has localised movements, though to a lesser extent than the other towns. There is very little long distance internal household migration within the HPDD sub-area.
- 2.43 Whilst external migration accounts for a relatively small proportion of household moves, the movements are concentrated in source/destination and distance:
- tending to be short moves to/from the fringes of neighbouring conurbations to the fringes of the HPDD sub-area, with 21% of all in-migration being from just three local authority areas – Tameside and Stockport, from the Greater Manchester side, and Sheffield;
  - most movements from Greater Manchester (mostly Tameside and Stockport) to the HPDD area relate to the fringe areas of High Peak, with moves from the western fringes of Sheffield mostly relating to the eastern fringe of the HPDD sub-area;
- These three metropolitan districts also account (along with Amber Valley) for 20% of migration from the HPDD sub-area.
- 2.44 The pattern of work place migration demonstrates a fit with the pattern of household migration. That is to say-
- High Peak demonstrates very strong net outward commuting, especially to neighbouring Greater Manchester;
  - Key centres of net out-commuting being Manchester, Stockport, Tameside and Sheffield, and Derby;
  - Dominated by local movements.
- 2.45 Notably, the National Park has a balanced workplace migration relationship with the rest of the HPDD sub-area and like the rest of the HPDD sub-area has notable net outward migration to Manchester and Sheffield.
- 2.46 The point to note here is that the strong workplace migration relationship the HPDD sub-area has with the surrounding conurbations is reflected in the strong household migration relationships that occur on the border fringes of the HPDD sub-area and these conurbations. Whilst such household movements are not large in the context of the overall number of HPDD household movements, they are locally significant and this is a relevant factor in the dynamic of the wider HPDD housing market. Along these lines, Figure 2.8, below, which

