Cornwall Annual Monitoring Report 2018

Progress against indicators listed in the Proposed Monitoring Framework of the Local Plan

Date: 17/12/2018 Version: 1

Cornwall Council

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CORNWALL COUNCIL

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INTRODUCTION

The Local Plan was adopted in November 2016, setting out the council's main priorities, policies and planning approach for delivering the vision and objectives of 'Future Cornwall', the council's sustainable community strategy. The underlying principle of the strategy is to manage future development to ensure all communities in Cornwall have an appropriate balance of jobs, services, facilities and homes.

In order to assess the effectiveness of policies that aim to achieve this balance, the Local Plan included a Proposed Monitoring Framework, outlining a number of key targets and trends as identified during the adoption process. This document represents the initial data collection and subsequent analysis against these indicators, focusing on those areas that were practical and measurable in years one and two.

In the following pages, indicators reported in years one and two are listed as originally worded in the Local Plan, with any amendments subsequently referenced. Key 'Headlines' are then highlighted, followed by a brief summary of the findings. Where applicable, more detailed data is included in the appendix.

It is important to acknowledge that when approaching indicators it often became clear that the proposed target or trend was not on consideration practical; or had been defined in a loose or unsuitable way considering the available sources or subject matter. Where this has been the case, this document outlines the original proposed measure and provides justification for any changes made. It is recognised that in order to remain useful, the monitoring framework must also retain sufficient flexibility to respond to opportunities and changing priorities, and the focus should remain on what effectively assesses policy, rather than a dogmatic adherence to first impressions of the evidence base.

Though generally reported once a year, this document will evolve and can be updated on an ad hoc basis as new data is sourced and analysis is undertaken. As it is not practical to update every indicator at the same time, where relevant, headings will reference when individual indicators were last updated.

As with national datasets, it is anticipated that in some cases historical data may change in the future; as more robust data sources are identified or older data becomes augmented with further information. Again, the focus will be on increasing the validity of the measure, and so if historical data requires later amendment this will not provide a barrier to providing the best impression on delivery towards a target.

The Local Plan Review is due to take place in the near future, and it is anticipated that the proposed monitoring framework and the indicators reported in this document will be revised in future to maintain a close link between the Local Plan and the framework.

CORNWALL MONITORING REPORT – OVERVIEW TABLE

No.	INDICATOR	TRENDS/TARGETS	Reported?	OVERALL JUDGEMENT	NOTES
2.1	Number of new jobs created	Provision of 38,000 full time jobs within the plan period.	✓	😐	Current trends indicate slow growth, though data volatility makes the metric unreliable
2.2	Amount of net additional B Class employment floorspace provided	704,000 sqm of employment floorspace over the plan period (359,583 sqm to be B1a and B1b office use, 344,417 sqm to be B1c, B2 and B8 industrial premises). Delivery in accordance with sub area targets.	✓	☺	On track for industrial target but trailing for Office target
2.3	Net additional purpose built student accommodation	Delivery of purpose built student accommodation that meets the needs generated through the expansion of the university in Falmouth and Penryn.	✓	☺	Projections indicate PBSA will reach target by 2030
2.4	Net additional Gypsy Traveller pitches provided by: (i) Residential Pitches; (ii) Transit Pitches; (iii) Showpeople	Delivery of 318 residential pitches; 60 Transit pitches; and 11 Show People pitches in the plan period.	®	☹	Currently behind on residential target.
2.5	Net additional communal nursing and specialist accommodation for older persons	Delivery of 2,550 bed spaces in communal establishments (defined as Residential Care and or Nursing Homes).	✓	😐	Now a dated target, as there has been an ideological shift away from care home beds towards extra care and alternative provision
2.6	Housing Trajectory including: a)Net additional dwellings in previous years; b) Net additional dwellings for the reporting year; c) net additional dwellings in future years and; d) the managed delivery target 2.6 Amount of new housing development allocated in Neighbourhood Plans	To deliver a minimum of 2,625 dwellings per year (residual delivery of a minimum of 52,500 dwellings over the plan period • To ensure at least a 5 year supply of deliverable housing sites • Delivery in accordance with sub area targets identified in the Policy • To ensure that Neighbourhood Plans allocate land for housing to meet any shortfall within 2 years of the adoption of the Local Plan Strategic Policies	✓	☺	Currently 6.7yr housing supply
3	3. Amount and proportion of all major development provided in settlements. 3.1 Net additional dwellings provided in named settlements and the remainder of the CNA. 3.2 Development of eco-communities at West Carclaze/Baal and par Docks	Delivery in accordance with sub area targets Planning application for development at West Carclaze/Baal approved and or allocated in a submitted site allocations Local Plan within two years of adoption of the Cornwall Local Plan- Strategic Policies	◖	☺	Hopeful to get approval for West Carclaze in the near future
4.1	Amount and type of town centre uses floorspace provided (i) within town centres areas (ii) edge of centre and out of centre locations (iii) out of town areas	Report annual delivery by: (i) town centres areas (ii) edge of centre and out of centre locations (iii) out of town areas	✓	☺	Insignificant loss edge of centre, significant gains out of centre.
4.2	The amount of retail service, comparison and convenience floorspace in the main town centres 4.2a The changes in the proportion of retail uses within Primary Shopping Areas	Report as change over time and in relation to the Cornwall average	✓	😐	Combined net loss of 3,691 sqm convenience and comparison floorspace. Gradual decline to the number of A1 units by 1% over last 3 years
4.3	Amount of retail and community facilities lost in smaller settlements	No net loss of existing services and facilities in smaller settlements	✓	☺	Net increase of 2,800 sqm floorspace was delivered
4.4	Vacancy rates in main town centres	Rates at or below the national average	✓	☺	Cornwall average vacancy rate of 11.6% is below the national average (12.4%) for 2018
5.2	Amount and quality of new tourism facilities	Net increase	◖	?	Under review - definition, methodology and source to be reassessed
6.1	Amount of housing provided to meet households with specific needs	Net increase	✓	😐	Facilities with care homes decreasing, while facilities outside care homes increasing.
6.2	Amount of new housing provided by house type, tenure and size	All new housing developments of 10 or more dwellings provide an appropriate housing mix that reflects local housing market need	®	?	Source for *new* housing by area being examined. Year on year mix examined.
6.3	Number of self build and custom build housing provided	Net increase	®	☺	Net increase' problematic but meeting demand for provision of appropriate sites
8.1	Number of affordable homes provided: (i) on sites where dwellings would have a combined gross floorspace of more than 1000 square metres; or (ii) on sites with a net increase of 10 dwellings 8.1a Amount of contribution towards affordable housing provision on sites of 6 to 9 dwellings in rural parishes	To attain a contribution towards affordable housing provision on all development with a combined gross floor space of more than 1000 square metres or on sites with a net increase of 10 or more dwellings or on sites of 6 or more dwellings in rural areas	®	?	Contribution information not yet collated - alternative datasets will be investigated 2018-19
8.3	Amount of affordable housing provided on sites meeting the minimum threshold by Zone	All new housing developments above the affordable housing threshold to meet the minimum percentage of affordable housing for the appropriate zone: 50% in zone 1, 40% in zone 2 , 35% in zone 3, 30% in zone 4 and 25% in zone 5.	✓	☺	Judgements would not yet be valid as exception sites need to be identified within data. New source/method required
11	Number and proportion of gypsy and traveller applications refused on grounds of not complying with policy	All residential and transit site developments meeting the requirements of the policy	✓	☺	Just 3 permissions refused post Local Plan adoption

CORNWALL MONITORING REPORT – OVERVIEW TABLE (Continued)

14	(i) renewable energy capacity and low carbon energy generation installed; (ii) useable heat generation capacity installed	Net increase	✓	☺	Renewable capacity steadily increasing.
15	Number or proportion of applications refused on grounds of potentially effecting Renewable energy capacity of existing installations	100%	✓	☺	"100%" target inappropriate. No permissions refused.
17.1	Mineral production (tonnes) of various sectors (primary aggregates, secondary / recycled aggregates, building stone, china clay and metalliferous minerals) in the county	Primary aggregate production in line with the annual Local Aggregates Assessment Net increase in the production of secondary/recycled aggregate	✓	☺	Primary aggregate production meeting need in Cornwall and providing enough for export
18	Number of applications granted on safeguarded mineral sites identified as causing the sterilization of the mineral reserves	No net loss to sites safeguarded for their mineral reserves	✓	☺	No net loss to sites safeguarded for their mineral reserves
19.1	Capacity of existing and new waste management facilities for: (i) transfer stations; (ii) Composting; (iii) Recycling; (iv) energy from waste;(v) landfill	No change in capacity for all waste facility types apart from an increase in:(a) construction and demolition waste landfill provision of 659,000 tonnes;(b) construction and demolition waste recycling of 377,000 tonnes; (c) 200,000m3 of landfill capacity for Local Authority collected waste	✓	☺	Waste capacity relatively consistent for Transfer Stations and Composting, small drop for recycling. Landfill capacity dropped.
19.2	Amount of waste a) recycled b) composted and c) used in energy production	Annual net increase	✓	☺	Net increase of throughput between 2016 and 2017 for all types of processing of waste
19.3	Amount of waste landfilled by (i) households and ii) commercial and industrial.	Annual net increase	✓	☺	Considerable net decrease in landfilled waste
20.1	Number and proportion of applications for new waste management facilities approved on policy grounds	100%	✓	☺	100% (4 permissions) approved since LP adoption.
21.1	The amount (%) of residential development provided on previously developed land.	Reported figure as trend	✓	😐	% of residential development on PDL has been generally decreasing, although returned to 14-15 levels this year
21.2	The amount (%) of employment floorspace provided on Previously developed land.	Reported figure as trend	✓	☺	Remained relatively consistent - 41% housing on Previously Developed Land in 17-18
23.3	% of SSSIs in a favourable or recovering condition	Improve	✓	😐	Improvement overall since 2010, slight decrease in the past 2 years
23.4	Number of new dwellings approved in the landscape designations AONB and Heritage Coast	Report Trend	✓	☺	Approvals in AONB rising but with limited impact. Approvals in HC falling post adoption.
23.5	Number of applications approved for wind turbines and Solar Farms in the landscape designations AONB and Heritage Coast	Report Trend	✓	☺	No applications approved in either designations in the past 3 years.
24.1	Number of listed buildings on the 'At Risk' Register	Decrease	✓	😐	Total no. of listed buildings on the At-Risk register has risen slightly this year.
25.2	Open space managed to green flag status	Maintain or improve accessibility to good quality open space	✓	☺	4 parks awarded green flag status (100% of submitted applications)
26	Number of applications approved contrary to the advice of EA on (i) flooding grounds (ii) water quality	Zero	✓	☺	Minimal approvals contrary to advice (2 in 17-18).
27.1	Percentage of people living within 30 minutes of an employment centre employing more than 500 people that use public transport or walk	(quoted incorrectly as 85%)	✓	😐	At 90% for 2016 but has decreased for the last two years
27.2	Access to services and facilities by public transport	Increase	®	😐	Access to facilities defined as access to major towns. Dropped 1% from 2014 to 2015 and remained the same in 2016

REPORTING STATUS IN YEAR ONE		NOTES:	OVERALL JUDGEMENT	
✓	Able to report in year 1 (December 2017)	This table displays only those indicators that feature in the Annual Monitoring Report in the first year, as originally worded in the Local Plan document. "Overall Judgement" is a broad, subjective measure, used only as a rudimentary indicator of the observable effect of the policy as currently demonstrated by the data available. As indicators are in reality more detailed and reasoned judgements will be more nuanced than this, these indicators are included here only to provide a quick overview of the perceived performance of the Local Plan as a whole.	☺	Good
®	Able to report a revised indicator/measure		😐	Fair
®	Indicator under suitability review		☹	Requires Improvement
◖	Partially reported / Reported in non-standard form		?	Undetermined

2.1	**Provision of 38,000 full time jobs within the plan period** (Last updated: October 18)

Original Indicator and notes:

2.1	Job provision	Number of new jobs created	Provision of 38,000 full time jobs within the plan period.

Headline data

An estimated 4,100 jobs have been created since 2010, bringing us 11% towards the target. Average growth of 586 jobs per year indicates that at this pace we are below target, currently on pace to provide 11.7k jobs by 2030.

It is very important to note however the volatility of the data, and how much this can influence calculations. Last year, projections suggested 36k more jobs in Cornwall by 2030, much closer to the 38k target. However, a relatively poor year in 2017 has changed this dramatically. This may well be more to do with volatility in data sampling, as opposed the reflection of an actual trend. The overall trajectory of jobs however is less volatile, and does suggest employment figures are steadily rising.

As the chosen source provides annual data by the calendar year (Jan-Dec), it is not yet possible to have data for the current year, or to ascertain the exact progress that has been made towards the target of 38,000 jobs since the adoption of the Local Plan.

The average progress indicated per year (calculated by averaging year on year growth between 2010 and 2017) indicates growth of 586 jobs per year. At this pace, Cornwall would be significantly short of the target of 38,000 jobs by 2030; instead achieving 11.7 thousand new jobs.

Data Volatility

It is important to note that any influence of this policy is unlikely to be felt until after 2016, and that projections in this case are a simple measure used only to estimate progress towards the target at the end of the plan period. It is not assumed that this will reflect an actual trend.

The source data is sample based, and as such direct comparisons year on year are problematic. This means that outliers can often skew the year to year picture, as may be the case for example with the 2016 figures below.

Growth in FT Jobs per Year			
2014	**2015**	**2016**	**2017**
500	-1,500	10,700	-6,800

As you can see, there is quite a jump of the number of full time jobs in 2016, and again the following year, and it is likely this has more to do with the sample itself than this representing such a disproportionate surge in full time employment. Taking an average over a larger period is one way of mitigating these weaknesses to an extent.

Data Source

It is important to note that there are a number of sources available regarding employment statistics, and each has strengths and weaknesses at county level. Of those sources, all are sample based, in that they do not provide real time data on employment as a whole and instead apply statistical modelling to sample surveys.

The **Business Register and Employment Survey (BRES)**, is a statutory survey of businesses. BRES is based on a larger sample than the Annual Population Survey and so is likely be more accurate. However this does not include figures on the self-employed or those employed within the agricultural sector. Given Cornwall's profile, it would be advantageous to include these.

The **Annual Population Survey: Resident Population** is voluntary and is completed by individuals sampled by household. The **Annual Population Survey: Workplace** is based on the location of businesses themselves rather than individual residences. All of these data sources are available at www.nomisweb.co.uk.

In order to include both the self-employed 'worker owners' and agricultural figures in the data, the monitoring framework has referenced the **Annual Population Survey: Workplace** data. An important weakness of this is to acknowledge that the confidence interval in this case (the range in which the true figure is likely to be) is relatively high, and may be plus or minus up to 14,000 jobs. It is not possible to ascertain the confidence interval for the BRES figures as the sample size at county level is not known.

2.2	**Amount of net additional B Class employment floorspace provided**

Original Indicator and notes:

2.2	Employment floorspace provision	Amount of net additional B Class employment floorspace provided	Delivery of 704,000 sqm of employment floorspace over the plan period of which 359,583 sqm to be B1a and B office use and 344,417 sqm to be B1c, B2 and B8 industrial premises. Delivery in accordance with sub area targets identified in the policy.

Headline data

Office Employment Floorspace

- **49,584 sqm of office employment floorspace delivered since 2010. This is down from 55,734 sqm last year due to more losses of office space offsetting gains in 17-18.**
- **Summing completions and commitments to deliver office floorspace to date brings us 38% towards reaching the office target (36% last year). At the current rate of delivery, the office floorspace target would not be met by 2030.**
- **2 of the 19 community network areas are currently on target to reach their local target by 2030**

Industrial Employment Floorspace

- **119,121sqm of industrial employment floorspace delivered since 2010 (was 78,655 sqm in 16-17)**
- **An average of 14,890 sqm industrial employment floorspace delivered since 2010 (up from 11,237 last year).**
- **Summing completions and commitments to deliver office floorspace to date brings us 79% towards the industrial target. At the current rate the industrial target would be exceeded.**
- **9 of the 19 community network areas are currently on target to reach their local target by 2030**

Notes

Employment floorspace is not delivered at regular intervals in practice, and so future projections are a crude measure used only to give an indication of the likelihood local and overall targets will be met by the end of the plan period.

At the time of writing, a number of community network areas have negative average net office or industrial space, often based on the loss of a single large site to other uses. For these areas, projections are not useful as continued negative progress is not realistic.

The following table outlines the amount of employment floorspace completed in specific community network areas, along with figures on granted permissions that have not yet been completed.

COMMUNITY NETWORK AREA	Type of Employment Space (M2)	Target 2010-30	Net Completions To Date	Net Commitment To Date	Residual to Target
BODMIN	Office	22,833	5,054	3,122	14,657
	Industrial	24,667	-2,962	6,359	21,270
BUDE	Office	10,583	1,049	2,150	7,384
	Industrial	10,583	4,977	5,958	-352
CAMBORNE, POOL & REDRUTH	Office	80,833	16,885	12,387	51,561
	Industrial	41,417	20,394	-987	22,010
CAMELFORD	Office	3,917	-1,121	816	4,222
	Industrial	3,917	7,041	4,996	-8,120
CARADON	Office	3,667	1,064	39	2,564
	Industrial	11,083	6,331	2,048	2,704
CHINA CLAY	Office	13,250	6,429	5,705	1,117
	Industrial	13,000	18,864	25,371	-31,236
CORNWALL GATEWAY	Office	6,917	872	-339	6,384
	Industrial	10,583	1,291	4,777	4,515
FALMOUTH & PENRYN	Office	25,750	13,792	6,430	5,528
	Industrial	21,667	1,358	5,654	14,655
HAYLE & ST IVES	Office	19,083	1,741	8,304	9,039
	Industrial	19,083	2,933	3,894	12,256
HELSTON & SOUTH KERRIER	Office	12,417	375	7,268	4,773
	Industrial	17,000	5,249	7,487	4,264
LAUNCESTON	Office	14,083	255	189	13,639
	Industrial	28,167	12,984	5,003	10,181
LISKEARD & LOOE	Office	20,667	-30	9,550	11,148
	Industrial	23,667	5,133	9,671	8,863
NEWQUAY & ST COLUMB	Office	27,750	2,955	16,601	8,194
	Industrial	30,250	7,546	21,043	1,661
ST AGNES & PERRANPORTH	Office	15,167	2,817	1,716	10,633
	Industrial	9,333	10,967	2,421	-4,055
ST AUSTELL & MEVAGISSEY	Office	9,750	-1,755	-122	11,627
	Industrial	12,500	2,512	2,695	7,293
ST BLAZEY, FOWEY & LOSTWITHIEL	Office	11,833	2,208	-12	9,637
	Industrial	13,500	-657	2,156	12,002
TRURO & THE ROSELAND	Office	38,333	-1,732	11,006	29,059
	Industrial	31,250	14,596	42,044	-25,390
WADEBRIDGE & PADSTOW	Office	6,667	1,174	694	4,799
	Industrial	6,667	4,043	3,021	-396
WEST PENWITH	Office	16,083	-2,447	190	18,340
	Industrial	16,083	-3,479	-532	20,094
TOTAL	**Office**	**359,583**	**49,584**	**85,694**	**224,305**
	Industrial	**344,417**	**119,121**	**153,079**	**72,216**

2.3	**Net additional purpose built student accommodation.** (Last updated: December 2018)

Original Indicator and notes:

2.3	Purpose built student accommodation	Net additional purpose built student accommodation	Delivery of purpose built student accommodation that meets the needs generated through the expansion of the university in Falmouth and Penryn.

Headlines:

- **Student growth of 1,460 expected in Falmouth/Penryn by 2019-20 academic year**
- **An estimated 57% of student accommodation currently provided by HMO's, 43% by PBSA. PBSA accounts for approximately 3% more of student accommodation than in 2017.**
- **Delivery of the strategy looks to address the imbalance; estimated provision of PBSA looks set to provide enough beds to reach the target of 80% of students living in PBSA by 2030.**

Introduction:

Local Plan policy 2a sets out the need for "provision of additional bed spaces within purpose built accommodation commensurate with the scale of any agreed expansion of student numbers at the Penryn campus, taking into consideration any changes in student numbers within other campuses at the Universities in Falmouth and Penryn."

In order to monitor this we must outline the demand, both in terms of the anticipated growth in student numbers; the number of students in HMO's (House in Multiple Occupation) and the number of students in PBSA (Purpose Built Student Accommodation); in addition to current and anticipated supply as illustrated by PBSA beds available to Falmouth/Penryn students and the anticipated delivery of schemes in and around Penryn campus.

Demand:

Table 1 illustrates the projected demand, following the same methodology Falmouth and Exeter Universities outlined when the Allocations DPD was being prepared. This also indicates the proposed supply of sites (allocations) that are within the DPD. The number of bed spaces required to satisfy the growth is set out as 80% of the gross number of students; in line with the ratio agreed as part of the S73 application.

Originally the council understood that Falmouth and Exeter Universities would be the primary generators of student growth within the towns, however, during the pre-submission consultation it became clear that Falmouth Marine School would also be seeking to increase their student numbers, and it is now estimated that this would create a further demand of approximately 428 bed spaces by 2030.

The tables below indicate student projections as of December 2018 for Falmouth and Exeter Universities, together with additional demand expected from Falmouth Marine School:

Table 1: *Student number projections – Falmouth University and University of Exeter in Cornwall*

	Student Projections: Falmouth University and University of Exeter				
Enrolment Type	**2016/17**	**2017/18**	**2018/19**	**2019/20**	**Growth 16/17 to 19/20**
Falmouth University (PENRYN)	2,872	3,473	3,181	3,296	**424**
University of Exeter (PENRYN)	1,941	2,335	2,340	2,659	**718**
GROWTH: Penryn Campuses	-	995	287	434	1,142
TOTAL: Penryn Campuses	4,813	5,808	5,521	5,955	1,142
Falmouth University (FALMOUTH)	1,477	1,492	1,825	1,795	**318**
GROWTH: Falmouth University (Falmouth)	-	1,010	46	404	318
TOTAL: All Campuses	6,290	7,300	7,346	7,750	1,460
TOTAL: Student growth Falmouth & Penryn		**1010**	**46**	**404**	**1,460**

Additional demand anticipated from Falmouth Marine School is outlined below:

Table2: *Student number projections provided by Falmouth Marine School 2018*

	FALMOUTH MARINE SCHOOL Projected Student Headcounts / Growth					
Enrolment Type	**2018/19**	**2019/20**	**2020/21**	**2021/22**	**2022/23**	Growth (18/19 to 22/23)
Higher Education & Higher Apprenticeships	94	125	175	175	175	81
Work based learners & full cost recovery	64	100	150	200	200	136
Further Ed. (not considered against bed space demand)	153	160	170	180	190	37
Total Headcounts	311	385	495	555	565	254
Total Headcounts for Requirement Calculation	**158**	**225**	325	375	375	217
Demand for bed spaces*	**126**	**180**	260	300	300	174

** Bed space demand for Falmouth Marine School calculated as 80% of students from Higher Education, Higher Apprenticeships and Work-based learners. Students in Further Education are not considered part of the demand.*

Note that 16/17 and 18/19 Falmouth University and University of Exeter figure are draft figures -. Official verified numbers from OfS will be available by the end of January 2019.

Students in HMO Accommodation

It is estimated that currently almost two-thirds of student bed spaces are provided through existing HMO's other accommodation. Council Tax exemptions directly applied to occupation by students under 'N' reinforces this. Since 2010, the number of dwellings used for student accommodation purposes (HMO) has increased notably in both Falmouth and Penryn. Falmouth provides considerably more accommodation than Penryn or Mabe, with 484 dwellings currently in use for student occupation. However the most recent data indicates that HMO levels might be falling. The number of dwellings with an 'N' Exemption (Dwellings Occupied by Students) dropped by 14 from 2016 to 2017, and fell by a further 61 dwellings in 2018 (Currently at 484). The Council acknowledges that the reality is that in real terms the true number is likely to be higher given that some properties might not have sought exemptions on Council Tax, but it does appear indicative of a trend, and suggests increased levels of purpose built accommodation may be beginning to have an effect.

Chart 1: 'N' Exemptions -Dwellings Occupied by Students

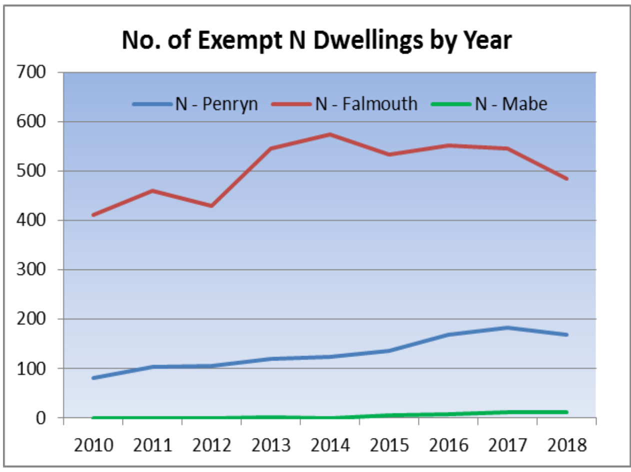
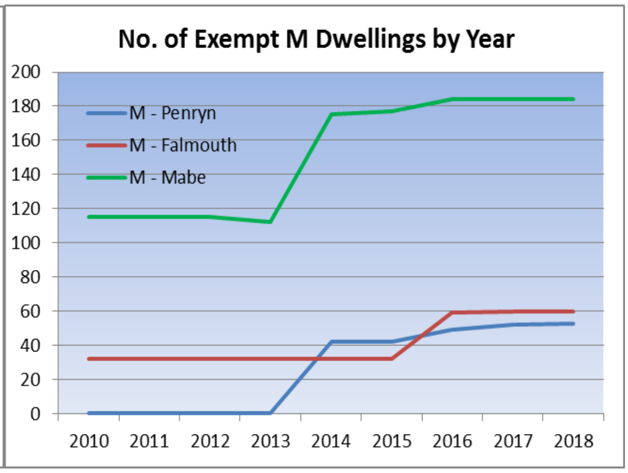


Chart 2: 'M' Exemptions - Halls of Residence



In addition to this current provision of HMO accommodation within the towns, there is further provision of more formal student Halls of residence which have been recorded through Council Tax exemption 'M'. Chart 2 indicates how there is a larger provision of these within the Parish of Mabe. It is also worth noting here the relatively lower number of halls residences within both Falmouth and Penryn, and that these lower numbers are in addition to the number for houses being used for student accommodation.

Supply:

The table below shows the demand for additional bed spaces arising from the future growth of the three main campuses (including Falmouth Marine School) against the current stock of student accommodation provided within the towns and in the site allocations for student accommodation identified within the DPD. It is important to note that currently, before growth, the larger proportion of student accommodation sits within the HMO market and not within PBSA, hence the need for the Council Strategy to look to re-balance this moving forward.

Table 3: *Calculated Supply vs Demand (note that this table is also available in the appendices to this report)*

	DEMAND FOR STUDENT BEDS							
	Before Student Growth (2015-16)		Current Picture (17-18)		Additional Requirement		Expected Position At 2030	
Current Purpose Built Student Accomodation (Falmouth / Penryn)	Student Headcount (15-16)	Estimated Bed Spaces required	Additional Students (16-17 - 17/18)	Additional Bed Spaces required for year	Additional Students Projected by 2030	Additional Spaces required to meet 2030 demand	Total Students Expected by 2030	Bed Spaces required
Penryn Campus	4,813	3,850	708	566	1,979	1,583	7,500	6,000
Woodland Campus	1,477	1,182	348	278	-25	-20	1,800	1,440
Falmouth Marine School*	172	138	58	46	305	244	535	428
TOTAL DEMAND FOR BED SPACES		**5,170**		**891**		**1,807**		**7,868**

	SUPPLY OF STUDENT BEDS			
	Before Student Growth (2015-16)	Current Picture (2017-18)	Additional Requirement	Expected Position At 2030
Current and Expected Purpose Built Student Accomodation	Actual PBSA Bed Spaces (15-16)	Actual PBSA Bed Spaces (17-18)	Further Bed Spaces Expected before 2030	Estimated Supply of Bed Spaces (30/31)
Glasney Single (Penryn - on campus)	1,449	1449	0	1449
Glasney Shared (Penryn - on campus)	150	416	0	416
Tremough Barton (Penryn - on campus)	33	31	0	31
Sidings (Penryn)	233	233	0	233
The Warehouse (Penryn)	21	21	0	21
Tuke House (Falmouth)	156	156	0	156
Maritime Appartments (Falmouth)	137	142	0	142
The View (Falmouth)	82	82	0	82
Armyn House (Falmouth)	31	31	0	31
Montezuma House (Falmouth)	0	22	0	22
Killigrew Townhouse (Falmouth)	0	16	0	16
Kimberly Townhouse (Falmouth)	0	24	0	24
Packsaddle	0	0	124	124
Penryn Campus	0	0	1047	1047
StudyTel	0	0	539	539
JLP/Granite Planet	0	0	329	329
Ocean Bowl	0	0	190	190
Admirality House/Rosslyn Hotel	0	0	117	117
Coachworks/Strongman's Yard	0	0	134	134
Fish Strand Hill	0	0	112	112
Penvose	0	0	2000	2000
New small scale PBSA (Sterling House & Trescobea	0	0	27	27
Ponshardon	0	0	400	400
Treliever (Site Allocation)	0	0	450	450
TOTAL SUPPLY FROM PBSA	**2,292 (44%)**	**2,623 (43%)**	**5,469**	**8,092 (103%)**
ESTIMATED HMO BEDS**	2,878 (56%)	3,438 (57%)	-	-224 -(3%)

Demand for student beds is estimated at 80% of the total headcount (with an assumed 20% living at home) as agreed in the S73 permission

* Falmouth Marine School demand is estimated as 80% of the total headcount excluding those in Further Education

** Estimated HMO beds assumed as total demand after discounting those living at home, minus provision of PBSA

Current Picture:

With the delivery of the strategy set out in the Allocations DPD (i.e. delivery of the growth in PBSA schemes in and around the Penryn campus), it appears rebalancing could be achieved effectively by 2030, and the provision of PBSA looks set to supply enough student beds to meet the calculated demand at this point. Presently, current and expected purpose built student accommodation actually appears to show that there will be more than enough student beds within the Falmouth/Penryn area to reach the agreed target. However it must be recognised that developments are by nature subject to change, and as various sites begin to come forward during this process it is likely that some developments may fall short of the forecasted amount of student beds, or some may not materialise at all. Annual monitoring of this developing picture will provide a benchmark by which to assess provision against the emerging demand going forward.

2.4	**Gypsy and Traveller site provision** (Last updated: December 2018)

Original Indicator and notes:

2.4	Gypsy and Traveller site provision	Net additional Gypsy Traveller pitches provided by: (i) Residential Pitches; (ii) Transit Pitches; (iii) Showpeople	Delivery of 318 residential pitches; 60 Transit pitches; and 11 Show People pitches in the plan period.

Revisions to the indicator:

It was decided that while the targets for this indicator remain the same, the phrasing needs to be amended in line with changes to the collation methodology. While previous reporting focused upon the *delivery* of sites (based on a 'caravan count' exercise completed by the housing service), it became apparent that this was problematic for the following reasons:

- It emerged that in actuality not every site was visited for the exercise. Ideally this would have been the case but in reality is this cannot be done robustly due to capacity issues.
- There is inherent difficulty using a caravan count to derive number of pitches as tourers could be mobile at the time of the count.
- The nature of the community itself also makes this method somewhat unreliable, as pitches for a family might not be counted if they were temporarily residing elsewhere.
- The expense that conducting ongoing site visits would incur would likely not be worth the anticipated deviation in data from using alternative collection methods.

To account for this, more focus has been placed on the permission approvals themselves. A 'pitch' can be broadly thought of as a small area of land that will typically accommodate 2 caravans (be they static or touring). Therefore if a permission references 2 caravans, this can be seen to equate to 4 pitches. This methodology was broadly in place previously. As such, all permissions are interpreted using the '2 caravans to a pitch' methodology.

In light of the above, the indicator has been revised to the following:

2.4	Gypsy and Traveller site provision	Net additional Gypsy Traveller pitches approved by: (i) Residential Pitches; (ii) Transit Pitches; (iii) Showpeople	Approval of 318 residential pitches; 60 Transit pitches; and 11 Show People pitches in the plan period.

Background, Context and Brief Chronology

The 2015 Needs Assessment indicated that demand for residential pitches exceeded the existing supply by 139 pitches. Based on survey data, this figure increased to 198 pitches through family formation by 2020, and to 318 pitches by 2030.

The Local Plan Examiners report was published in September 2016, and recommended that the plan was sound subject to a number of modifications. This included revising targets to those recommended in the needs assessment. The Cornwall Local Plan: Strategic Policies document was subsequently adopted by Cornwall Council on 22nd November 2016 and includes the following targets from 2015 to 2030:

- 318 permanent residential pitches;
- 60 Transit pitches; and
- 11 Travelling Showpeople plots.

The Council intended to produce a Gypsy & Travelling Communities Site Allocations Development Plan Document (DPD) to identify a range of residential, transit and Showpeople sites as required to meet the needs identified in the Local Plan: Strategic Policies document, and to identify small sites as emergency stopping places. As such, the Council produced a scoping report on what the DPD could contain and has consulted widely with local residents and key stakeholders for their comments on what is proposed. This consultation concluded in June 2016 with the key recommendation being to identify more, smaller, sites to meet the need. There is a significant gap between the identified need and supply of sites. The preparation of a DPD would likely be a complex, convoluted and lengthy process, and could sustain uncertainty and under provision. Due to the unique character of travelling communities and the significant shortfall of provision, the Council is continuing to explore a more dynamic and collaborative approach, including direct delivery and provision of sites in addition to encouraging private provision to accelerate supply. A draft set of action has been prepared and pursued where practicable while the DPD is held in abeyance.

Once this programme and strategy is established, a detailed Travelling Communities Pitch and Plot Trajectory will be prepared and monitored. In the interim, development is likely to continue to come forward through applications for windfall sites which can be monitored.

Windfall sites are unallocated sites that are granted planning permission. Historically, windfall sites have been the main source of Gypsy and Traveller pitch delivery in Cornwall.

Current picture: Permanent Residential Pitches

From collating permissions for gypsy and traveller permanent residential pitches from the past 5 years, we can see that an average of 14 pitches have been approved per year. This average has dropped from 15 pitches per year last year due to the change in the 5 year range used for the average, but has remained broadly consistent.

Last year, assuming the 5 year rate, the council was predicated to fall significantly short of the target of 318 pitches, achieving just 216. Using the most recent average (2013-2017), this estimate has subsequently been revised down to 202 additional pitches to be approved by 2030. In order to meet the target in the remaining years of the plan, the average approval rate required is estimated to be significantly more than the current rate (14 per year) to 24.4 pitches per year.

Since the adoption of the Local Plan in November 2016, there have been a total of 14 permissions granted for permanent residential gypsy and traveller accommodation, amounting to 23 pitches.

Site	Pitches	Date Permitted
Manor Parsley, Mount Hawke	1	24/01/2017
Land Opposite Croft Pascoe	3	02/03/2017
S of Little Hallaze	4	09/03/2017
Land off Trevella Lane	1	09/08/2017

Land SE of Glentham	1	29/11/2017
Pearces Place	1	16/01/2018
Land SE of the Old Warehouse	1	26/01/2018
Silverwell Yard	1	23/01/2018
Carne Cottages	3	19/03/2018
Land Adjacent to Mount Pleasant	1	28/03/2018
Apondarosa	2	28/11/2018
Meadon Meadows	2	29/11/2018
Pearces Place	1	16/01/2018
Land SE of the Old Warehouse	1	26/01/2018

However it is worth noting that the targets themselves derive from the needs assessment published in November 2015, and so progress towards the target should include any permissions granted after that time, as opposed to the period post adoption as would typically be the case with other indicators. Using this interpretation, the below permissions should also be included towards the target:

Site	Pitches	Date Permitted
Land At Bowling Green	10	23/11/2015
Bowling Green, Trenisson	1	07/10/2016

In addition to the key targets, the needs assessment also breaks down the areas of need into areas of the county; East, Mid and West. The majority of permissions that are counted towards the target figure currently relate to the Mid area. The area of most need (West) has currently received just 3 permissions amounting to 5 pitches.

Current picture: Transit Pitches

Since the needs assessment, there has been one permission granted for transit sites, amounting to 15 transit pitches.

The average number of transit pitches delivered per year in the last 5 years is 3. This is indicates that we are likely to exceed the target of 60 pitches by 2030, as the average figure required to meet this target currently equates to just over 4 pitches, although this is based on a single permission.

Site	Pitches	Date Permitted
Land W of A38, South Trevido, Horningtops	15	21/01/2016

Current picture: Travelling Showpeople Plots

Since the needs assessment, there has been one permission granted for a travelling showpeople site, amounting to 3 plots.

Site	Plots	Date Permitted
Puddle Cottage, A39 between Valley Truckle and Knights Mill Hill	3	01/03/2016

The average number of travelling showpeople pitches delivered per year in the last 5 years is 0.6. This is indicates that we are unlikely to meet the target of 11 plots by 2030, as the average figure required to meet this target currently equates to 0.9 plots. However, considering that the difference between these averages is relatively low (0.1 plots) and that the overall target is in this instance relatively small (just 8 plots remain to be delivered), it seems reasonable that we will be able to meet this shortfall in the future.

2.5	**Communal establishment provision** (Last updated: Permissions - December 18, CQC – July 18)

Original Indicator and notes:

2.5	Communal establishment provision	Net additional communal nursing and specialist accommodation for older persons	Delivery of 2,550 bed spaces in communal establishments (defined as Residential Care and or Nursing Homes).

Limitations of the Data:

Before examining the data, it should be noted that recording the net number of care home beds for the elderly in Cornwall is problematic, and all figures quoted should be considered an indication only given the available information. As such, figures should be interpreted with caution due to the following:

- It is often very difficult to find information regarding the **loss** of care home beds for the elderly, as this is information that has not been tracked and is more often than not removed from online information sources once a home has closed. As we are interested in **net** care home beds for the elderly, it is necessary to know how many beds were available at each facility before their closure.
- Care homes often do not exclusively provide care for the elderly, and instead offer a mix of care for younger people; people with learning disabilities; nursing care for people with physical disabilities etc. Again this makes it difficult to assess just how many beds for elderly accommodation have been lost specifically. Provision for these categories are also not mutually exclusive; a resident can be in many of these categories in addition to being over 65.
- Information given on the planning application form often differs from information found online, such as care home sites and the CQC. Often the description in the planning application will reference 'care home' where further investigation can categorise the provision differently.
- Where terms such as 'nursing home' are used it is often not clear whether they are to be exclusively for elderly people, for people with some physical/learning disability or a mix.
- Changes of use can reference that the site was 'a former care home'. Notwithstanding the difficulties outlined above with regard the provision itself, it is also difficult to know whether this can genuinely be considered a care home 'loss', as the care home may have been closed for a number of years. Additionally, if it is to be observed as a loss it can be unclear when this should be attributed as having happened.

For the purposes of in house analysis (based on planning permissions, completions, changes of use and demolitions), all provision noted to include care home beds for the elderly have been included in the figures for both gains and losses. Losses as described in the previous point are included against the year of the current planning application.

Planning Permission Data:

By examining all planning permissions that reference intent to change a buildings use to that of a care home or vice versa, demolish a care home or build care facilities, we can begin to get a picture of the trend of provision in Cornwall.

Looking solely at data on completions of Residential Care/Nursing Homes and demolitions, we can see that an estimated **net of 59 beds have been lost since 2010**. This indicates that we are not currently progressing toward the now outdated goal of 2,550 net beds by 2030. This is discussed further below.

Examining extant permissions (planning permissions that have not yet expired), this picture looks a little brighter for the future, with **455 care home beds with permission that are yet to be completed**, though it cannot be guaranteed that all of these facilities will go ahead and be built in their initially proposed form.

Further information on this data, broken down by Community Network Area and by year, can be found in the Appendix.

Care Quality Commission (CQC) Data:

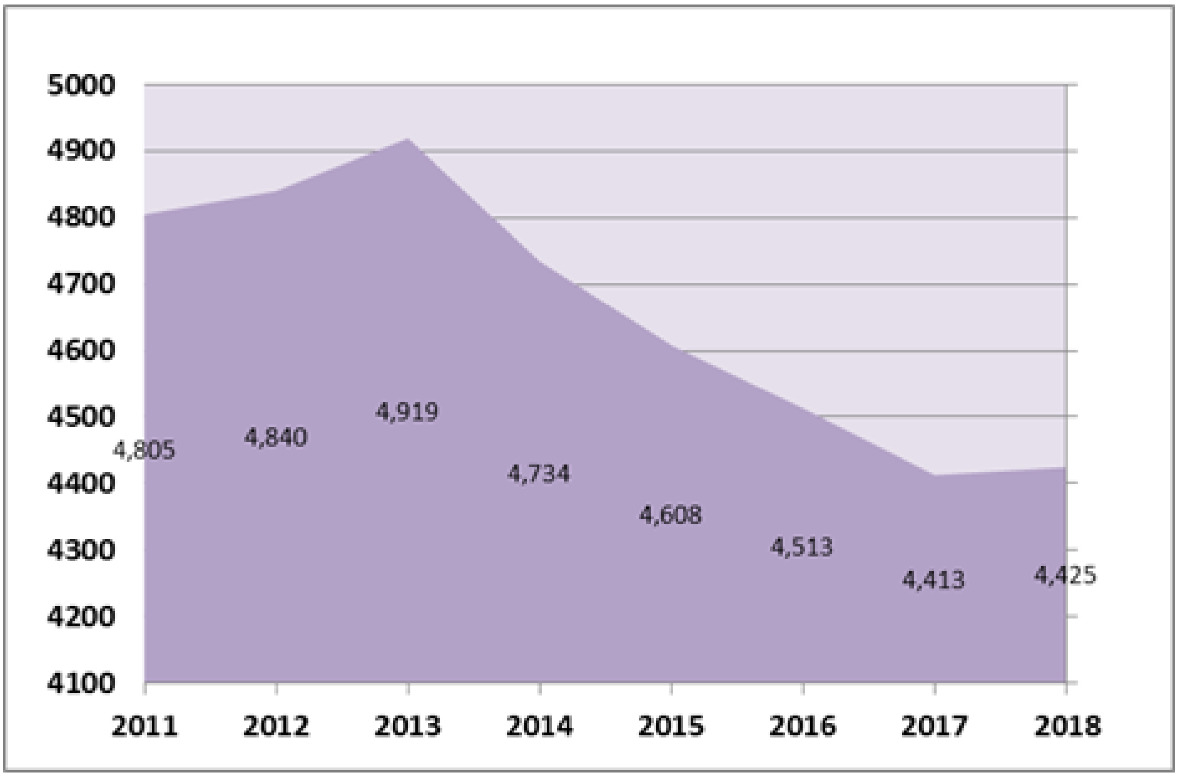
The CQC provide data downloads on care home bed numbers and other regulated activities and service types. The CQC update this on a monthly basis, and an archive list of the care directory with filters is also available for historic data over time.

By looking at the Care directory with filters (Active locations for providers registered under the Health and Social Care Act), we can examine provision year on year to try and ascertain if any trends are emerging. Taking data from 2011 onwards, we can examine the care home counts identified in Cornwall Local Authority in addition to the number of beds they provide. For our purposes we have taken a snapshot of each year at either November or December (based on data availability). For the current year (2018) we have taken a snapshot of July as we have not yet reached that part of the year. This will be revised to a December/November snapshot at a later date.

The data is accessible here:
http://www.cqc.org.uk/content/how-get-and-re-use-cqc-information-and-data#directory

Current Picture (CQC Data)

Using the CQC downloads as a data source, the loss of care home beds appears more stark. As you can see below, the trend seems to be a gradual loss of care home beds post 2013. Taking the starting point of November 2011 (the earliest available dataset); this suggests a loss of 380 care home beds (14 Care Homes) over this period.



However, the Local Plan was only adopted in November 2016, and so the impact of Policy 2a (which includes the Care Home Bed target) cannot be reasonably expected to have been felt until some time after this date. Looking then at the latest figures (01/07/18) in comparison to December 2017, there has been a small uptick; with one more care home appearing on the register and 12 extra beds (Note that care home beds and care homes do not correlate directly; care beds may be lost in active care homes for example).

Summary

Though the permissions data and the CQC data do not match in terms of scale; they both unequivocally indicate that since 2011 there has been a loss to care home beds that continues to be prevalent post adoption of the Local Plan. The scale of that loss though is not as clear, though it seems likely that the data from the CQC would be more reliable as they have a statutory obligation to maintain a list of registered providers. Data gathered from permissions may have omitted some changes of use and/or demolitions if former use had not been specifically referenced in the permission description.

This might be explained in part by the ideological shift away from care home provision and towards the provision of alternatives such as extra care and sheltered accommodation. More recently, Adult Social Care have concentrated efforts on providing an increase of 'key in door' elderly provision; allowing elderly people to continue living in their own home or within a designated area while continuing to enjoy appropriate care facilities.

Ideological Shift – Continued appropriateness of the indicator

The Community Based Support and Housing Commissioning Framework 2017-2025 sets out the intention to radically reshape the way services are delivered, ensuring community based preventative services are supporting people to stay in their own homes for as long as possible.

The framework examines the community based care and support solutions and suitable housing provision for all adults with assessed eligible care needs in Cornwall; including those in transition from children's to adults' services. The strategic aim is to replace and take forward the recommendations in the Long Term Accommodation Strategy for People with Eligible Social Care Needs 2015-2018 to:

- Determine the types of accommodation and geographical locations required for all client groups
- Increase provision of supported living and extra care schemes and other models as alternatives to residential care
- Proactively plan for the future needs of our population through data collection and analysis and develop cost-effective solutions
- Invest in community based services, both health and social care, to prevent reliance on long term residential services.

The purpose of the Community Based Support and Housing Commissioning Framework is to:

- Provide a detailed understanding of existing housing options and community based support services across Cornwall
- Analyse data on the existing and predicted needs of the people of Cornwall with eligible social care needs and people at high risk of developing needs
- Identify current and potential housing options, resources available to support people to stay in their homes and opportunities for new housing schemes across the county as an alternative to residential care
- Help plan and shape the market across Cornwall to ensure that there are a range of appropriate community based care and support options that promote independence, social inclusion and community assets
- Enable Cornwall Council to adequately plan for any future capital and revenue expenditure for community based care and support and housing options
- Improve health and social care outcomes, to move away from complex systems to simplistic pathways to housing and care and support provision
- Respond to the increasing demand upon all services not only as a result of an ageing population but also the multiple or complex needs of clients.

In summary the delivery of this framework is a key tool to support the transformation of services and supports the movement towards personalisation giving people choice and control over where and how they live their lives.

The strategic direction is to increase the range of independent housing options for adults with eligible social care needs which will include support to adapt existing homes, development of new accessible housing, the development of self-contained accommodation with access to health and social care services and reducing the number of non-specialist residential care home placements.

Extra Care

Extra Care offers self-contained accommodation, incorporating design features to facilitate independence and safety. Personalised care and support is accessible 24 hours a day, 7 days a week on site through block contract arrangements; as well as access to meals, communal facilities and social activities on site and/or arranged in the community. The schemes also offer access to assistive technology, such as telecare and alarms, and adaptations and specialist equipment to meet health and social care needs.

The Social Care Accommodation Project aims to develop extra care housing to promote the health and well-being of people who wish to live independently and to provide an alternative to residential care. The aim is to increase housing and care options for older people with social care needs, including providing person centred care and support and accommodation for rent and sale.

The projected demand for extra care housing for older people has been based on a nationally recognised tool from the Housing Learning and Improvement Network. The predicted demand is adjusted by tenure type based on a tenure split between the % of ownership and the % of rented in the over 65 years population in each local area.

	Total Extra Care Required by 2025	Extra Care required for sale by 2025	Extra Care required for rent by 2025
Caradon	**495**	**408**	**87**
Carrick	**573**	**480**	**93**
Kerrier	**529**	**442**	**87**
North Cornwall	**658**	**548**	**110**
Penwith	**523**	**423**	**100**
Cornwall	**3530**	**2936**	**594**

The analysis tool predicts that in order to meet future demand then over the next 8 year period 3,530 extra care units will be needed across Cornwall, 594 of these units need to be for social rent and 2,936 of these units need to be for shared ownership or outright sale. The Council’s role will be to support the development of the social rented units although on a mixed tenure scheme there will also be a proportion of shared ownership and/or outright sale units.

During 2019 the Council will be conducting a procurement exercise to secure a strategic partner or partners to help deliver 750 units of extra care across the county. The strategic partner/partners will design, develop and operate the schemes. The successful bidders will be awarded contracts in March 2020.

2.6	New home provision (Last updated Aug 18)

Original Indicator and notes:

2.6	New home provision	Housing Trajectory including: a)Net additional dwellings in previous years; b) Net additional dwellings for the reporting year; c) net additional dwellings in future years and; d) the managed delivery target e) Amount of new housing development allocated in Neighbourhood Plans	To deliver a minimum of 2,625 dwellings per year (residual delivery of a minimum of 52,500 dwellings over the plan period • To ensure at least a 5 year supply of deliverable housing sites • Delivery in accordance with sub area targets identified in the Policy • To ensure that Neighbourhood Plans allocate land for housing to meet any shortfall within 2 years of the adoption of the Local Plan Strategic Policies

Source: 2017 Cornwall 5 Year Housing Land Supply Statement

Note that more detailed information on the provision of new homes in Cornwall is available from the Cornwall 5 Year Housing Land Supply Statement August 2018 and the Cornwall Housing Implementation Strategy August 2018. The housing trajectories appended to these reports provide a detailed breakdown of past and expected delivery as required by the above local plan indicator. The below provides a brief summary of performance against the outlined Local Plan monitoring targets.

Headlines:

a) Net additional dwellings in previous years
b) Net additional dwellings for the reporting year

For monitoring purposes, 'net additional dwellings' can be seen to essentially equate to the number of new dwellings delivered/completed each year. The figures for completions since the beginning of the plan period are outlined below:

Year	Completions
2010/11	2060
2011/12	2375
2012/13	2278
2013/14	2040
2014/15	2702
2015/16	2536
2016/17	3074
2017/18	3429

c) Net additional dwellings in future years

This equates to the number of dwellings that have extant permission but have not yet been delivered. As at the 31st of March there are **27,966** homes with planning permission.

d) The managed delivery target

The Local Plan requires that any shortfall in meeting the Local Plan requirement should be met in the following five years. Since the start of the plan period 20,494 homes have been built. This means there is a shortfall of 506 against the cumulative local Plan requirement of 21,000 over the same period. If this shortfall is added to the LP requirement of 2,625 per year, then the managed target over the next five years becomes 13,631. A 5% buffer is applied to this figure, bringing the target for the next five years to **14,313**, or 2,863 dwellings a year.

e) Amount of new housing development allocated in Neighbourhood plans

The breakdown of allocated housing in neighbourhood plans at the time of writing (September 2018) is as below. Where the total for a neighbourhood plan is zero, this indicates that although the plan outlines how much housing is to be provided, none is specifically allocated and will instead be sourced by other means, such as windfall, infill or rounding off.

Neighbourhood Plan	Total
Bude-Stratton	0
Crantock	0
Feock	0
Gwinear-Gwithian	0
Hayle	0
Lanreath	0
Mevagissey	0
North Hill	0
Quethiock	0
Rame Penisula	0
Roche	200
Roseland Peninsula	0
South Hill	0
St Erth	54
St Mewan	0
St. Eval	100
St. Ives	350
St. Minver	150
Truro and Kenwyn	0
Withiel	0

To deliver a minimum of 2,625 dwellings per year (residual delivery of a minimum of 52,500 dwellings over the plan period

On average, the Council has delivered 2,562 houses a year since the beginning of the plan period, slightly below the annual target. However in the last 3 years this averages to 3,013 homes, and suggests this is improving. The number of housing permissions approved each year suggests that the council is on course to exceed the overall housing target by 2030.

Ensure at least a 5 year supply of deliverable housing sites

The table below demonstrates that when assessed against the five year requirement. The supply of 19,207 represents a 6.7 years supply, and so the 5 year supply requirement has been met.

Plan Requirement	52,500 (2,625 pa)
Five Year requirement (2,625 x 5)	13,125
Plus shortfall of 506 (21000 – 20494)	13,631
Five year requirement plus 5% buffer	14,313
Supply capable of being delivered within 5 yrs	19,207
Supply as a percentage of 5yr Requirement	134.2%
Years Supply	**6.7**

Delivery in accordance with sub area targets identified in the Policy

The Cornwall Housing Implementation Strategy August 2017 provides details of progress towards meeting the Local Plan targets for each main town and Community Network Area. The following table taken from this report provides an update to Table 2 in the Cornwall Local Plan

Location	Proposed Allocation	Completions 2010-18	Planning Permission Not Started and Under Construction	Windfall on sites of less than 10 homes 2023-30
Penzance / Newlyn	2,150	403	449	238
West Penwith CNA residual	1,000	492	438	210
Hayle	1,600	267	1149	77
St Ives-Carbis Bay	1,100	601	437	259
Hayle and St Ives CNA residual	480	276	164	77
Helston	1200	323	1100	98
Helston and the Lizard CNA residual	1,100	759	396	350
CPIR	5,200	2073	2581	462
CPR CNA residual	1000	594	295	231

Falmouth-Penryn	2,800	1025	1365	189
Falmouth and Penryn CNA residual	600	392	237	112
Truro-Threemilestone-Shortlanesend	3,900	1085	3853	133
Truro and Roseland CNA residual	1200	873	451	231
St Agnes and Perranporth CNA	1,100	844	755	175
Newquay	4,400	1635	2992	420
Newquay and St Columb CNA residual	400	296	287	84
Eco-Community	1,500	0	0	0
St Austell	2,600	1435	1671	133
St Austell CNA residual	300	282	104	84
St Blazey, Fowey and Lostwithiel CNA	900	614	336	161
China Clay CNA	1,800	995	469	252
Wadebridge	1,100	252	525	42
Wadebridge and Padstow CNA residual	1,000	537	437	196
Bodmin	3,100	676	1443	98
Bodmin CNA residual	100	64	45	49
Camelford	375	185	78	42
Camelford CNA residual	625	245	190	133
Bude-Stratton-Poughill	1200	391	580	77
Bude CNA residual	600	228	178	154
Launceston	1,800	461	887	70
Launceston CNA residual	500	239	156	161
Liskeard	1,400	470	926	56
Liskeard and Looe CNA residual	1,500	747	665	224
Callington	480	153	317	56
Caradon CNA residual	520	242	284	140
Saltash	1,200	205	1056	91
Torpoint	350	8	71	0
Cornwall Gateway CNA residual	350	127	67	35

3.2	**Development of eco-communities at West Carclaze / Baal and Par Docks** (Last updated: October 2018)

Original Indicator and notes:

3.2	Strategic distribution of development	Development of eco-communities at West Carclaze/Baal and Par Docks	Continued monitoring of progress

West Carclaze/Bal Eco-Community

The Strategic Planning Committee resolved to approve a planning application (PA14/12186) for the West Carclaze/Bal Eco-Community on 30 March this year subject to completion of a Section 106 legal agreement. This agreement is now advanced and we are hopeful to be able to release a decision approving the application in the near future.

Par Docks

Nothing to report at time of writing.

4.1	**Amount and type of town centre uses floorspace provided (i) within centres (ii) edge of centre (iii) out of centre** (Last Updated: December 2018)

Original Indicator and notes:

4.1	Viability and vitality of retail town centres	Amount and type of town centre uses floorspace provided: (i) within town centre areas (TCA) (ii) edge of centre (iii) out of town areas	Report annual delivery by: (i) town centre areas (ii) edge of centre (iii) out of town areas

Headlines:

- **Vacancy rates in TCAs have increased by 2% since 2013**
- **The number of units within A1 and A2 use within TCAs are on a gradual decline**
- **A3 restaurants and cafes increased in TCAs by 0.8% since 2013 (though no change this year)**
- **Net reduction of -981 sqm convenience and -2710 sqm comparison floorspace within TCAs**
- **Total vacant floorspace increased by 6,885 sqm to 65,834 sqm (gross) within TCAs**
- **Floorspace in edge of centre areas a combined net loss of 615.3 sqm**
- **Delivered in out of town retail areas a combined net gain of 22,144 sqm**

Methodology:

Street surveys of the towns are completed between May and June of each year as a way of maintaining a consistent approach to monitoring the viability and vitality of 16 main towns in Cornwall. The results are used to update town centre maps, use class tables and retail sector tables by street for each town and to calculate the average figures for Cornwall. A detailed town report for each of the centres has been written to document changes over the year including any significant retail and housing developments that may affect a town. The individual town reports can be viewed on the main Cornwall Monitoring Report page.

The amount and type of all town centre uses for each town is shown in Table 1 below. These are added together to calculate the Cornwall average and to monitor any changes to the average. The table does not show the performance of an individual town in comparison to the average so this detail is covered within the corresponding town report.

(i) Amount & Type: Town centre areas

The 6 year trend shows the number of units within town centres is decreasing with a net reduction of 75 units Cornwall-wide since the 2013 survey. Losses can be due to units converting to residential use, amalgamating to create larger units or through demolition or redevelopment. This year, there was an overall net loss of 12 units.

The number of A1 retail units is gradually decreasing by approximately 0.1% per year as found in the previous four annual surveys, increasing to 0.7% this year; amounting to 1.5% overall. A2 uses are also reduced, in part in response to the reclassification of payday lending and betting shops to sui generis (SG) category which took place in time for the 2015 survey resulting in an approximate reduction of 3%

overall. Since then, there has been a small decline of about 0.1% annually. This increased to a 0.5% this year, in part, in response to the closure of many high street banks. (12 since June 2017).

***Table 1** Town centre Uses 2018 and Cornwall Averages 2012-2018 (no. units/ shops)*

Town Centre	A1	A2	A3	A4	A5	B1a	D1	D2	Vacant	SG	Total
Bodmin	82	22	11	6	8	5	10	8	21	8	181
Bude	107	19	20	5	10	2	1	3	10	4	181
Camborne	111	24	13	5	10	5	11	5	41	6	231
Falmouth	196	28	63	17	16	5	11	7	25	7	375
Hayle	64	11	10	4	5	5	5	2	7	4	117
Helston	78	29	13	9	5	6	17	6	20	8	191
Launceston	92	28	12	5	8	3	11	3	22	7	191
Liskeard	82	34	10	5	6	8	18	4	19	7	193
Newquay	144	19	41	13	21	8	8	9	28	22	313
Penzance	214	32	32	13	11	5	13	8	51	10	389
Redruth	94	26	14	5	10	10	20	9	34	6	228
Saltash	77	11	8	2	5	3	11	2	8	3	130
St Austell	98	39	11	6	8	9	16	10	42	12	251
St Ives	195	12	39	10	13	3	11	9	22	6	320
Truro	275	72	54	12	16	36	31	8	60	12	576
Wadebridge	106	18	18	4	6	4	9	4	9	6	184
Total All	**2015**	**424**	**369**	**121**	**158**	**117**	**203**	**97**	**419**	**128**	**4051**
Avg %	**49.7**	**10.5**	**9.1**	**3.0**	**3.9**	**2.9**	**5.0**	**2.4**	**10.3**	**3.2**	**100**
Movement	↓	↓	-	↑	↑	↑	↑	-	↑	↑	↓
2017/18	**50.5**	**11.0**	**9.1**	**2.9**	**3.8**	**2.7**	**4.9**	**2.4**	**9.6**	**3.1**	**4063**
2016/17	**50.6**	**11.1**	**9.0**	**2.9**	**3.8**	**2.7**	**5.0**	**2.4**	**9.4**	**3.1**	**4056**
2015/16	**50.7**	**11.3**	**9.0**	**3.0**	**3.6**	**2.8**	**4.8**	**2.5**	**9.1**	**3.2**	**4116**
2014/15	**50.5**	**13.2**	**8.6**	**3.1**	**3.7**	**2.9**	**4.7**	**2.6**	**8.6**	**2.2**	**4131**
2013/14	**51.2**	**13.5**	**8.3**	**2.9**	**3.5**	**2.9**	**4.5**	**2.6**	**8.4**	**2.2**	**4126**

CC data 2013-2017

In contrast, restaurants, cafes and takeaways (the hot food A3 and A5 uses) have increased over the timeframe with A3 use increasing by 0.8% and the A5 use up by 0.4%. The A4 pubs show a small recovery back to the levels recorded in 2016 with many of them re-opening after being renovated and with micro-breweries gaining in popularity to counterbalance those that have closed.

The number of units vacant (including those closed for refurbishment at the time of the surveys) has been creeping up from 8.4% recorded in 2013 to 10.3% this year: an increase of nearly 2% over 6 years when including all town centre uses.

The amount of vacant floorspace increased by 6,885 sqm (gross) to 65,834 sq m (gross) within the 16 towns monitored compared to last year. Vacant floorspace increased for the majority of towns although some showed improvements such as St Ives with the re-opening of the Tate Gallery although the gains were not so impressive due to the town losing two of its banks and a solicitor's office. The elevated rate in Truro can be in part explained by the closure of B&M and in St Austell part of the Sedgemoor Centre fell vacant and is being converted to residential use. The changes are summarised below along with the retailers with the largest floorspace area to give some meaning to the figures.

Table 2 Vacant Floorspace Sq m (gross) *Larger Units Named Only*

Centre	2017	2018	Loss/gain	Units Closed	Units Opened
Truro	7345.6	10124.6	-2779	B&M, Whirlwind Sports, Frixon	
Penzance	7720	8682.3	-962.6	Argos	
Falmouth	3053	3003.6	49.4		
St Ives	3674.5	2252.4	1422.1	Lloyds, CVC, NatWest	Tate Gallery
Newquay	3921.5	5375.8	-1454.3	NatWest, Sahara City, Shoe Zone	
St Austell	6917.5	9847	-2929.5	Sedgemoor Centre, Store 21	
Camborne	4364.2	4253.2	111		
Redruth	6490	5599	891		Co-op Funeral Care
Bude	1998.2	1812.1	186.1		
Wadebridge	1054	1119.5	-65.5		
Liskeard	2274	3200.5	-926.6	NatWest, Job Centre	
Launceston	3014	3141.6	-127.7		
Helston	2686.3	3488.6	-802.3	Job Centre, CC One Stop Shop	
Bodmin	1713.5	2637.5	-924	Edinburgh Woollen Mill, NatWest	
Saltash	700.1	722.7	-22.6		
Hayle	2022.2	573.2	1449		Home Bargains
Total	**58948**	**65834**	**-6885**		

(ii) Floorspace provided: Edge of centre areas

The net gains to the amount and type of net floorspace provided on edge of centre locations recorded in 2018 is summarised in the table below. There were very small losses to the convenience and comparison sectors with gains to other town centre uses with the exception of B1a office space. The majority of the loss of office space can be attributed to the change of use of the former Inland Revenue office to residential units on Infirmary Hill, Truro, which accounts for a total loss of 1482 sqm.

A1	A1	A1	A1	A2	A3	A4	A5			
Misc.	Conv.	Comp.	Serv.	Serv.	Serv.	Serv.	Serv.	D2	D1	B1a
0	-23.6	-186	319.6	137.6	132	0	0	297.1	271.3	-1563.3

(iii) Floorspace provided: Out of centre areas

The amount and type of net floor space delivered within out of town centre areas (but within the urban boundary of the main towns) for 2018 is shown in the summary table below. There was a combined gain in convenience / comparison floorspace of 7469 sqm and a combined 2195 sqm was also gained within the hot food premises. Substantial gains were attributed to the education sector represented by D1 uses with the completion of Callywith College, Bodmin. The only loss was again from the B1a office category – the majority being converted to residential use. The main loss of 3863 sqm office space was through the demolition of the former Council offices in St Clare, Penzance.

A1	A1	A1	A1	A2	A3	A4	A5			
Misc.	**Conv.**	**Comp.**	**Serv.**	**Serv.**	**Serv.**	**Serv.**	**Serv.**	**D2**	**D1**	**B1a**
0	3706.7	3763	311	175.4	1540.4	103.6	654.9	4515	11299	-3719.2

The majority of convenience and comparison floorspace was delivered within the completion of several out of town retail stores. These include the completion of Pets at Home and £Stretcher within the Former Heliport Retail Park in Penzance and a new replacement Lidl store to the west of the town. A new Lidl store was also completed within the urban area of St Austell. Smaller gains to A1 floorspace were attributed to the division of Unit 1 into 3 units within Launceston Retail Park, through the conversion of the former fire station in Camborne into retail units and from the change of use of Illogan Car Centre into a retail centre.

4.2	**Retail service, comparison and convenience floorspace in the main town centres and changes in the proportion of retail uses in Primary Shopping Areas (PSAs) (**Last Updated: December 2018)

Original Indicator and notes:

4.2	Viability and vitality of retail town centres	(i) The amount of retail service, comparison and convenience floorspace in the main town centres (ii) The changes in the proportion of retail uses within Primary Shopping Areas	Report as change over time and in relation to the Cornwall average

Headlines:

- **Convenience and Services uses have marginally increased by 0.2% and by 1.1% since 2013**
- **The Comparison sector has declined by 2.8% since 2013**
- **Vacancy rates have increased by 2.2% since 2013**
- **Net loss of convenience floorspace of 981 sqm, net loss of comparison floorspace of 2710 sqm**

Source:

To measure the diversity of a town centre the A Use Class retail element can be split into 3 main categories; convenience, comparison and services uses. The 'health' of a town can be monitored by tracking the proportion of these sectors over time, and comparisons can be made with other towns and with data collected nationally. This method therefore discounts non retail premises such as community and leisure facilities, clinics, surgeries and B1a offices.

(i) Retail convenience, comparison and service floorspace in the main town centres

Table 2 below shows the quantity of units within each sector by town along with its corresponding % sector share. The towns have been sorted in terms of their size and grouped by colour into similar sized centres with the highest or lowest proportions recorded this year highlighted. For example, Wadebridge has the highest proportion of shops within the convenience sector and also has the lowest vacancy rate. Redruth on the other hand, has the lowest comparison sector whilst St Austell recorded the highest vacancy rate of all the centres.

The table also shows the average proportions recorded over the last 6 years and demonstrates very small changes when monitoring Cornwall as a whole. When comparing this year's figures with the data recorded in 2013, there has been a net loss of 62 units overall, (25 in the last year) in terms of the quantity of units. Losses can be attributed to the change of business use to non-retail uses in addition to the reasons mentioned earlier.

There has been little change to the convenience sector with the proportion fluctuating between 8 – 8.5% with an overall increase of 0.2% since 2013. However, the comparison sector has reduced by 144 units over the timeframe reducing by 3.3% overall. There has also been little change to the service sector with a gain of 15 units (1%) but the number of vacant units has gone up by 73 units, gradually increasing each year to 11.6%, 2.2% higher than six years ago.

The individual town reports give the detail on the performance of each centre over time in relation to the changes to the street scene.

Table 2 *Proportion of Retail Sectors 2013-2018*

Centre	Convenience		Comparison		Service		Vacant		Miscellaneous		Total
	No	%	No	%	No	%	No	%	No	%	
Truro	28	5.6	205	41.0	201	40.2	60	12.0	6	1.2	500
Penzance	29	8.1	156	43.3	123	34.2	51	14.2	1	0.3	360
Falmouth	28	8.0	135	38.6	161	46.0	25	7.1	1	0.3	350
St Ives	32	10.8	147	49.8	92	31.2	22	7.5	2	0.7	295
Newquay	32	11.3	94	33.2	127	44.9	28	9.9	2	0.7	283
St Austell	15	7.0	66	31.0	87	40.8	42	19.7	3	1.4	213
Camborne	18	8.6	74	35.2	76	36.2	41	19.5	1	0.5	210
Redruth	14	7.4	55	29.1	83	43.9	34	18.0	3	1.6	189
Bude	17	9.8	75	43.1	70	40.2	10	5.7	2	1.1	174
Wadebridge	19	11.5	76	46.1	61	37.0	9	5.5	0	0.0	165
Liskeard	11	6.8	60	37.0	71	43.8	19	11.7	1	0.6	162
Launceston	11	6.4	58	33.7	78	45.3	22	12.8	3	1.7	172
Helston	9	5.6	49	30.2	83	51.2	20	12.3	1	0.6	162
Bodmin	15	9.6	56	35.7	64	40.8	21	13.4	1	0.6	157
Saltash	12	10.5	42	36.8	52	45.6	8	7.0	0	0.0	114
Hayle	10	9.5	38	36.2	49	46.7	7	6.7	1	1.0	105
Cornwall Average 2018	300	**8.3**	1386	**38.4**	1478	**40.9**	419	**11.6**	28	**0.8**	3611
Cornwall Average 2017	299	8.2	1431	39.4	1484	40.8	390	10.7	32	0.9	3636
Cornwall Average 2016	296	8.5	1441	38.8	1472	41.3	381	10.4	35	1	3626
Cornwall Average 2015	288	8.2	1512	40.1	1478	40.5	374	10.2	34	0.9	3686
Cornwall Average 2014	296	8.0	1521	41.2	1480	40.1	358	9.7	36	1	3691
Cornwall Average 2013	298	8.1	1530	41.7	1463	39.8	346	9.4	36	1	3673

Cornwall Retail Sector compared to the National Average

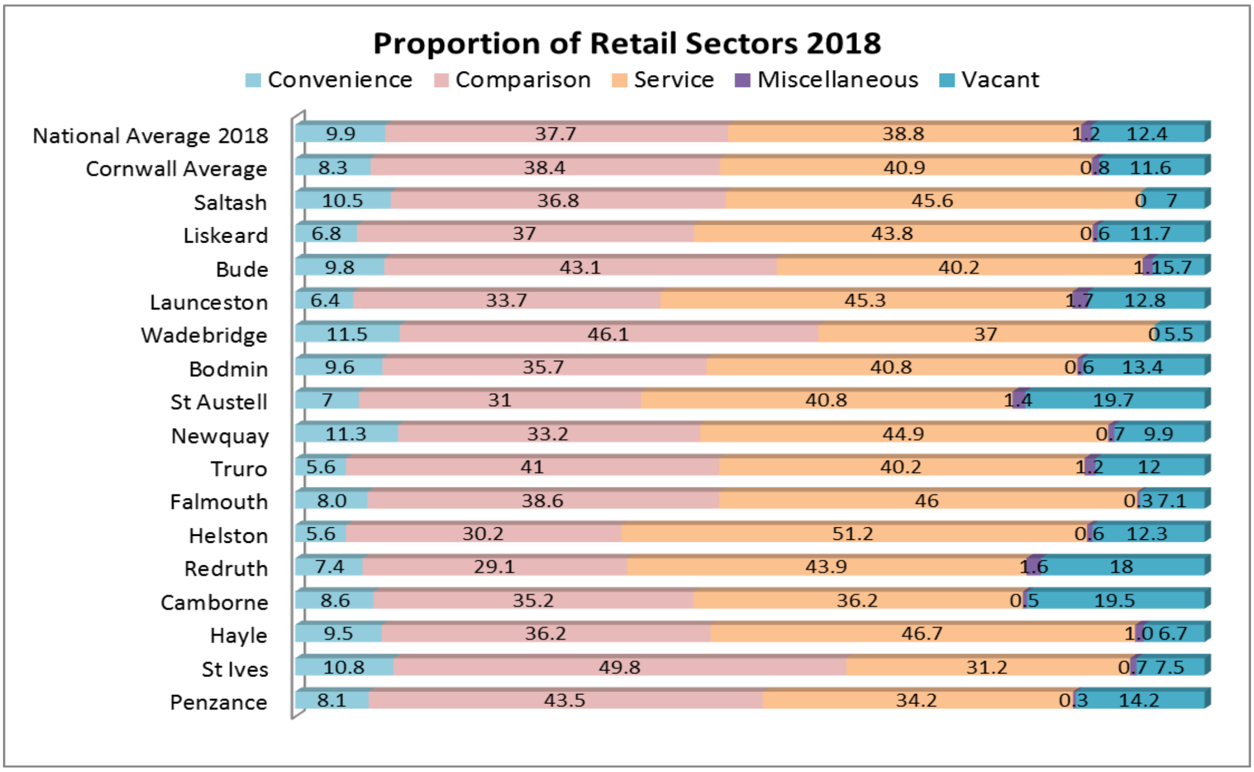
The proportion of retail sectors recorded in this year's survey is also shown below along with the national average figures (source; Experian GOAD). The retail sector average figures for Cornwall are much in line with the average data collated nationally. The convenience sector within Cornwall remains slightly below the national average but the county is performing marginally better in terms of its comparison and service sectors. Cornwall has retained a lower than average vacancy rate over the past 8 years when comparing it to the national average data although the margin between them is narrowing year on year. This is discussed in further detail within the relevant section of this report.

Table 3 Cornwall and National Average Retail Sectors 2018

2018	Convenience	Comparison	Service	Vacant	Miscellaneous
National Average	9.9	37.7	38.8	12.4	1.2
Cornwall Average	8.3	38.4	40.9	11.6	0.8

The proportion of retail sectors collated for 2018 shown in Table 2 are also shown in form of the chart below along with the national figures.

***Chart 1** % Proportion of Retail Sectors 2018*



Net change to A1 retail floorspace since last year within the TCAs

Retail floorspace within the towns are represented by convenience and comparison sectors. This section compares the net gain or net loss of floorspace compared to last year's survey. Table 4 below indicates that there was a loss of 981 sqm (net) to the convenience sector within Cornwall and a loss of 2,710 sqm (net) to the comparison sector. Notably, the greatest loss of convenience floorspace was from St Austell town centre which correlates with the relocation of its Lidl store to an out of centre location. The loss of 883 sqm of convenience use was subsequently gained within the comparison sector due to £stretcher opening in its place.

Table 4 Changes to the Convenience and Comparison Floorspace Data (sqm net) Since Last Year

Centre	2017		2018		Loss/Gain -/+	
	Convenience	Comparison	Convenience	Comparison	Convenience	Comparison
Truro	5753	57672	5635	55474	-119	-2198
Penzance	3332	19246	3223	18460	-110	-786
Falmouth	5814	18634	5571	18908	-243	274
St Ives	1516	7114	1465	7048	-51	-66
Newquay	8914	11717	9085	11099	171	-619
St Austell	4153	18329	3166	18762	-986	433
Camborne	2607	7884	2822	7438	215	-445
Redruth	4324	5317	4399	5424	75	108
Bude	3647	7739	3689	7722	42	-17
Wadebridge	3994	7708	4051	7426	57	-282
Liskeard	1726	5856	1614	5614	-112	-242
Launceston	725	3818	706	4045	-19	227
Helston	601	5143	631	4867	30	-276
Bodmin	1283	6506	1267	6208	-16	-298
Saltash	1446	3261	1531	3151	85	-111
Hayle	592	3208	592	4797	0	1589
Total	**50427**	**189151**	**49446**	**186441**	**-981**	**-2710**

The majority of towns (11 out of 16) also experienced a reduction to their comparison goods floorspace with the exception of Hayle which gained over 1500 sqm net due to the addition of Home Bargains which now occupies the previously vacant former Co-op store. The most notable loss of comparison floorspace was experienced within Truro city which correlates in part with the closure of B&M but also due to the high number of smaller stores closing such as Whirlwind Sports and Frixon.

(ii) The changes in proportion of A1 retail uses within the Primary Shopping Areas (PSA)

Another method of monitoring the health and viability of the centres is to record the percentage of units in A1 retail use within the designated Prime Shopping Area and the Town Centre Area. The proportions are calculated in relation to all town centre uses including non-retail uses. The data collected over the last four years supports the conclusions drawn earlier that A1 retail is decreasing and that this year, half of the towns had a below average proportion of A1 shops within their Prime Shopping Areas. The results in Table 5 below are sorted by size in order to easily identify the towns which are thriving and those with a declining A1 retail function. The towns with the lowest proportions tend to be those with a high proportion of service uses (the majority classified within the A2-A5 uses) and/or those towns with a high vacancy rate. There are some A1 uses which fall within the service category such as hair and beauty salons, travel agents and funeral parlours and are therefore included. This year's results show a 20% difference between the top performing town which was St Ives with the town with the lowest proportion; being St Austell.

Table 5 % Proportion of ground floor A1 retail uses within town centres

Town Centres	Prime Shopping Area	Town Centre Area
St Austell	45	39
Helston	46	41
Bodmin	47	45
Redruth	48	41
Liskeard	48	42
Newquay	49	46
Camborne	52	48
Hayle	52	55
Launceston	53	48
Falmouth	55	52
Truro	56	48
Penzance	57	55
Wadebridge	58	58
Saltash	60	59
Bude	63	59
St Ives	65	61
AVERAGE 2018	**53.4**	**49.8**
AVERAGE 2017	53.5	50.5
AVERAGE 2016	53.5	50.6
AVERAGE 2015	54.2	50.7

4.3	**Amount of retail & community facilities lost in smaller settlements** (Last Updated: December 2018)

Original Indicator and notes:

4.3	Viability and vitality of retail town centres	Amount of retail and community facilities lost in smaller settlements	No net loss of existing services and facilities in smaller settlements

Headlines:

- **3 Post Offices, 5 Convenience and 8 comparison stores have closed**
- **1 Bank, 4 chapels and 2 pubs have closed**
- **1447.6 sq m has been delivered within the food and drink sector (A3-A5 uses)**
- **Net increase of 2,800 sq m total floorspace delivered in smaller settlements**

Source:

The purpose of this indicator is to monitor the amount of retail and community facilities lost outside the 16 main towns and outside of their associated urban boundaries. A retail or community facility is only monitored here if there has been a change of use and is therefore excluded if the unit remains vacant. The table below itemises the losses completed within the year. The table shows 37 premises were lost to other uses, 28 of these being permanently lost through residential conversions; falling within C3 use.

Use Class	Use	No of Units	Floorspace	Retail Sector	No. Units (C3)
A1	Post Office	3	-110	Miscellaneous	3
A1	Shop	5	-357.1	Convenience	5
A1	Shop	8	-487.6	Comparison	5
A1	Shop	3	-172.6	Service	2
A2	Bank	1	-80.71	Service	1
A2	Office	1	-61	Service	1
A3	Café/Restaurant	4	-746	Service	3
A4	Pub	2	-567.8	Service	2
A5	Take/Away	1	-50	Service	1
D1	POW/Clinics	6	-1538.2	n/a	4
D2	Hall/ Gym	3	-941.1	n/a	1
		37	**-5112.11**	**n/a**	**28**

The monitoring also includes new provision completed within the smaller settlements and the table below records the number of new premises as being 42, with the majority of these being café /restaurants. The floorspace gained was however through extensions to existing café/ restaurants or through newly created small café areas associated with other existing establishments like within campsites, gyms and garden centres. Significant gains were recorded within the D2 leisure and recreation use which also was made up of extensions to existing facilities or through new shelters/ club huts to existing sports grounds. The largest newly created facility was a gym at Parkengue within a former industrial unit with a floorspace area of 1089 sqm.

Units created within the convenience/comparison sector made up a combined floorspace of 2054 sqm and were again delivered through the change of use or through the extension of existing premises. The largest shop with 366 sqm floorspace area was created through the redevelopment of the former sports hall at the disused airbase in St Eval, required by the adjacent Kernow Confectionary business.

To conclude, there was a loss to the number of A1 retail premises within smaller settlements but a gain to the overall floorspace through the enlargement of existing shops or through the change of use of existing buildings.

Use Class	Use	No of Units	Floorspace	Retail Sector
A1	Post Office	0	0	Miscellaneous
A1	Shop	6	1192.2	Convenience
A1	Shop	7	862.44	Comparison
A1	Shop	2	163	Service
A2	Bank	0	0	Service
A2	Office	2	153	Service
A3	Café/Restaurant	11	1248.8	Service
A4	Pub	1	48.3	Service
A5	Take/Away	2	150.5	Service
D1	Nursery/vet/museum	3	807.3	n/a
D2	Hall/ Gym	8	3286.5	n/a
		42	**7912.04**	

4.4	**Vacancy rates in main town centres** (Last Updated: December 2018)

Original Indicator and notes:

4.4	Viability and vitality of retail town centres	Vacancy rates in main town centres	Cornwall average below the national average.

Headlines:

- **The Cornwall average vacancy rate of 11.6% is below the national average (12.4%) for 2018**
- **The Cornwall average vacancy rate has remained below the national average for the past 8 years**
- **6 out of the 16 towns have a vacancy rate higher than the national average**
- **9 out of the 16 towns have a vacancy rate above the Cornwall average**

Source:

Table 5 below shows the vacancy percentages from 2012-2017 for the towns and for both the Cornwall and national averages, using retail sector data.

Table 5: *% Vacancy Rates 2012-2018 (Retail Sector data)- Experian GOAD National Averages (2012-18)*

	2012	2013	2014	2015	2016	2017	2018
Bodmin	10.4	7.7	10.8	9.5	12.6	11.3	13.4
Bude	7	7.7	7.6	5.6	4	7.4	5.7
Camborne	13.6	14.2	14.2	13.8	15.7	18.3	19.5
Falmouth	8.8	5.7	4.3	4.9	5.5	7.4	7.1
Hayle	7.5	1.9	0.9	5.6	3.8	6.6	6.7
Helston	7.7	11.1	12.6	14.1	9.2	8.5	12.3
Launceston	11.9	10	12.1	13	12.6	15.5	12.8
Liskeard	10.9	11.4	10.3	11	11.2	9.1	11.7
Newquay	5.5	5.6	6.7	7.6	7.4	8.5	9.9
Penzance	10.5	12	12.1	14.9	13.7	13.9	14.2
Redruth	17.7	18.7	19.9	23.5	20.4	18.8	18
Saltash	7.9	10.3	1.7	3.4	7	6.1	7
St Austell	12.1	14.5	15.7	15.3	19.4	18.4	19.7
St Ives	4.5	5.1	6.4	5.5	5.7	5.7	7.5
Truro	7.5	9.3	10.1	8.7	10.9	7.6	12
Wadebridge	4	5.9	7.1	6.5	7.6	7.7	5.5
Cornwall Average	**9.1**	**9.4**	**9.7**	**10.2**	**10.4**	**10.7**	**11.6**
National Average	13.2	11.5	13.7	12.7	12.1	12.1	12.4

The Cornwall average vacancy rate has consistently been lower than reported nationally but as the graph below shows the margin between them has narrowed to 0.8% this year.

Graph 1 Proportion of Vacant Units in Cornwall compared to the national Average 2010-18

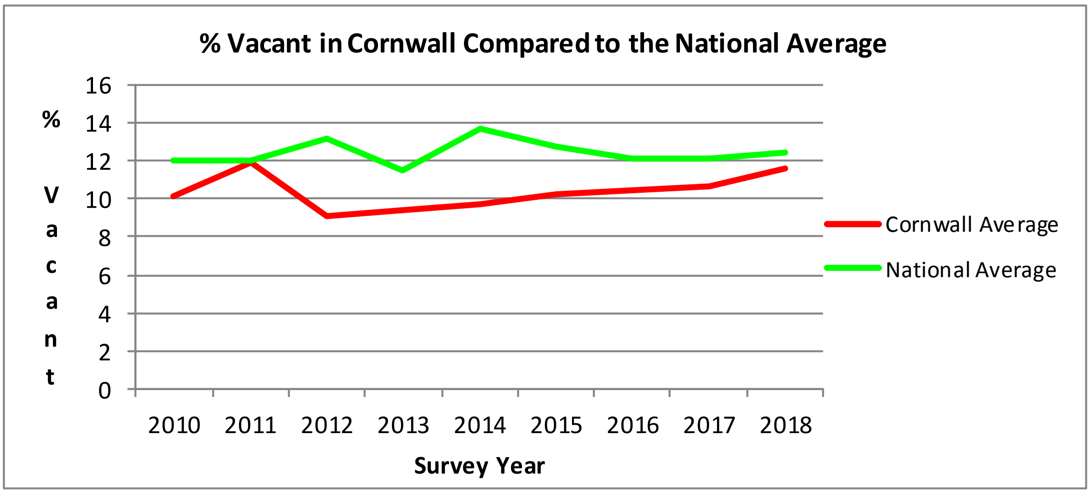


Table 6 Cornwall and National Average Vacancy Rates % (20120-18)

	2010	2011	2012	2013	2014	2015	2016	2017	2018
Cornwall Avg.	10.1	11.9	9.1	9.4	9.7	10.2	10.4	10.7	11.6
National Avg.	12.0	12.1	13.2	11.5	13.7	12.7	12.1	12.1	12.4

Bodmin now joins the towns which were reported last year as having a higher vacancy rate than the national average. These are St Austell, Redruth, Camborne, Liskeard and Penzance. Helston is now discounted from this list; just falling below 12.4%.

This year, Truro, Helston and Liskeard experienced large increases to their vacancy rates so join the previously listed towns in having a vacancy rate higher than the average in Cornwall.

Camborne, St Austell, Bodmin, Liskeard, Newquay, St Ives and Truro all experienced their highest vacancy rate over the time frame indicating 2018 as a tough year for some of Cornwall's centres. Contrary to this trend Redruth, Launceston, Falmouth, Saltash and Wadebridge all experienced a reduction to their vacancy rates.

General:

To conclude, the retail surveys measuring the viability and vitality of the 16 main towns shows that 2018 has been a mixed year depending on the town surveyed. But in terms of the average data collated for Cornwall the general trends (albeit small) indicate that the centres are decreasing in size, the comparison sector is in decline, vacancy rates are on the increase and the number of A1 retail shops within the centres is also on the decline. The top performing towns were Wadebridge, St Ives, Bude and Falmouth whilst the towns which continue to struggle are Camborne, Redruth and St Austell.

The composition of town centres is changing in response to consumer behaviour and market forces. Retailers are blaming competition from out-of-town supermarkets and retail parks, online shopping, parking charges and high business rates for the British high street decline. It has been reported that Cornwall has one of the highest online shopping rates with up to 40% being conducted online. The intention is to continue to monitor the high street and to document how the centres evolve.

6.1	**Amount of housing provided to meet households with specific needs** (Last updated: July 18)

Original Indicator and notes:

6.1	Provision of housing for households with specific needs	Amount of housing provided to meet households with specific needs	Net increase

Defining the Indicator

'Specific needs' are for monitoring purposes defined as the provision of dementia care, mental health, learning disability and physical disability facilities.

Source

The CQC provide data downloads on regulated activities and service types. This is updated on a monthly basis, and an archive list of the 'care directory with filters' is also available for historic data over time.

By looking at the 'Care directory with filters' (listing all active locations for providers registered under the Health and Social Care Act); we can examine provision year on year to try and ascertain if any trends are emerging. Taking data from 2011 onwards, we can examine the number of providers identified in Cornwall Local Authority that provide care for specific needs. For our purposes we have taken a snapshot of each year at either November or December for comparison (based on data availability). For the current year (2018) we have taken a snapshot of July as we have not yet reached that part of the year. This will be revised to a December/November snapshot at a later date.

The data is accessible here: http://www.cqc.org.uk/content/how-get-and-re-use-cqc-information-and-data#directory

Note that as for this indicator we are principally talking about housing, we are most concerned with the number of care homes that provide these facilities, rather than the availability of provision that does not include care home beds.

Headlines:

- **Facilities for all four strands of 'specific need' seem to be decreasing as the number of care homes appears to decrease**
- **Facilities for specific needs provided outside traditional care home settings appears to be growing**

Current Picture:

We know from our monitoring of indicator 2.5 (the provision of Care Homes Beds) that the number of care homes and care home beds in general appears to be decreasing, and this is perhaps unsurprisingly also true when looking at provision for specific needs within care homes.

In all four strands of what we are considering as 'specific needs' there is a similar pattern – a recognised dip in 2015, followed by a more recent, less pronounced uptick in 2018. The number of facilities perceived to have been lost in the last full year of 2017 (that have presumably either closed their doors or are no longer recorded as providing the facility are outlined below. It is worth noting however that the figures do not directly represent a loss of care homes, as it is likely the case that a single care home may be recorded as having the facility to provide multiple forms of care. Therefore the loss of a single care home might result in the loss of a number of facilities.

The below outlines perceived gains and losses in these facilities between datasets.

Loss of facilities within care homes	Dementia Care	Mental Health	Learning Disabilities	Physical Disabilities
2017	1	3	4	5
2018 (01/12/17 – 01/07/18)	0	+2	+4	+1

It is also noticeable that provision for specific needs outside of a care home setting has appeared to have improved over the same period. The table below reflects how the number of registered providers (excluding care homes) that are listed as having facility to support these needs appears to have grown since 2015:

Growth in providers with facility by year	Dementia Care	Mental Health	Learning Disabilities	Physical Disabilities
2016	+16	+17	+18	+15
2017	0	-3	-4	-1
2018 (01/12/17 – 01/07/18)	+1	+3	+3	+1

The apparent drop in care home provision (albeit with a more recent uptick) together with a growth in the provision available outside a traditional setting may be an indication of the recent ideological shift away from care homes in favour of alternate forms of provision (including extra care, sheltered housing etc.).

This shift is something to be examined further in assessing the provision available for the elderly and those with specific needs in Cornwall.

6.2	Ensure the provision of an appropriate mix of housing (Last Updated: September 2017)

Original Indicator and notes:

6.2	Ensure the provision of an appropriate mix of housing	Amount of new housing provided by house type, tenure and size	All new housing developments of 10 or more dwellings provide an appropriate housing mix that reflects local housing market need

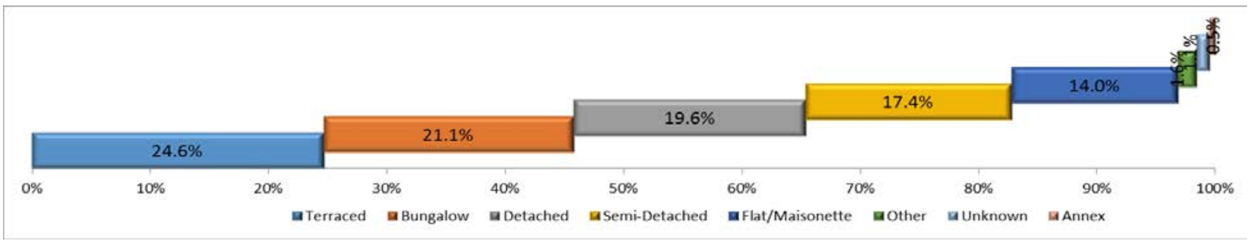
There is difficulty in assessing levels of new build house types, tenures or sizes as currently this data has not been actively collected. However, the government provides historical data regarding number of properties by Council Tax band, including data on number of bedrooms and house types at local authority level (Table CTSOP3.0). While this data doesn't isolate 'new' housing specifically, comparing breakdowns annually would indicate the emerging prevalence of particular housing types should these occur. It is unclear whether the government will continue to produce this dataset, but the council is looking at ways this information can be recorded from planning permissions in the future.

The source data for 2017 can be found here:
https://www.gov.uk/government/statistics/council-tax-stock-of-properties-2017

House types breakdowns in Cornwall

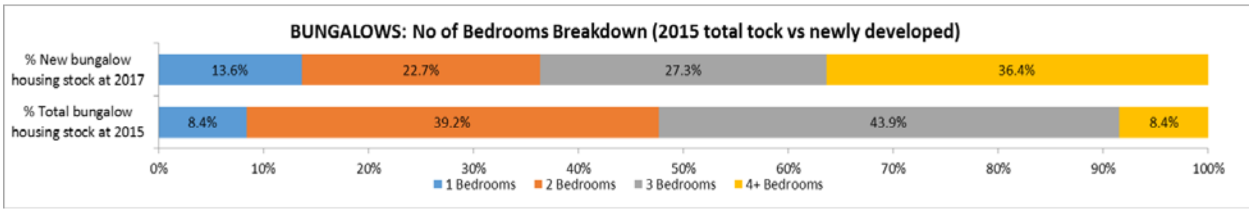
As of 2017, the current stock of homes in Cornwall can be broken down as follows:

House Type	Total Dwellings for House Type	Percentage of Total Cornwall Housing Stock
Terraced	66,000	24.6%
Bungalow	56,590	21.1%
Detached	52,480	19.6%
Semi-Detached	46,620	17.4%
Flat/Maisonette	37,600	14.0%
Other	4,290	1.6%
Unknown	2,930	1.1%
Annex	1,250	0.5%
Total	267,760	100%

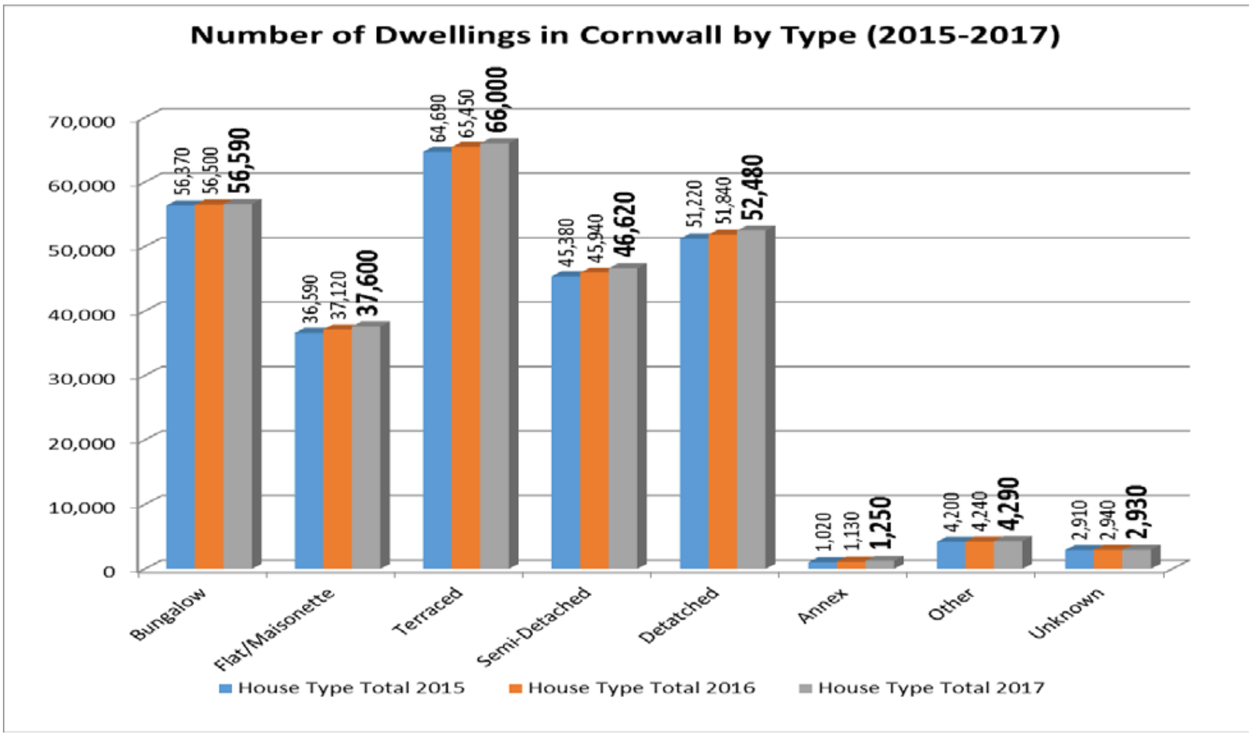


Unsurprisingly, the majority (almost a quarter) of homes in Cornwall are terraced houses. The other major housing types are fairly evenly distributed, but it is noticeable that over a fifth of housing in Cornwall currently comes from bungalows.

Where the size of houses in current stock compared to the 'new' houses built between 2015 and 2017 tend to be quite similar (in terms of number of bedrooms), it is interesting to note the change in this breakdown for new bungalows specifically, as there appears to have been a significant shift from 2 and 3 bed bungalows to more 4+ bed provision.

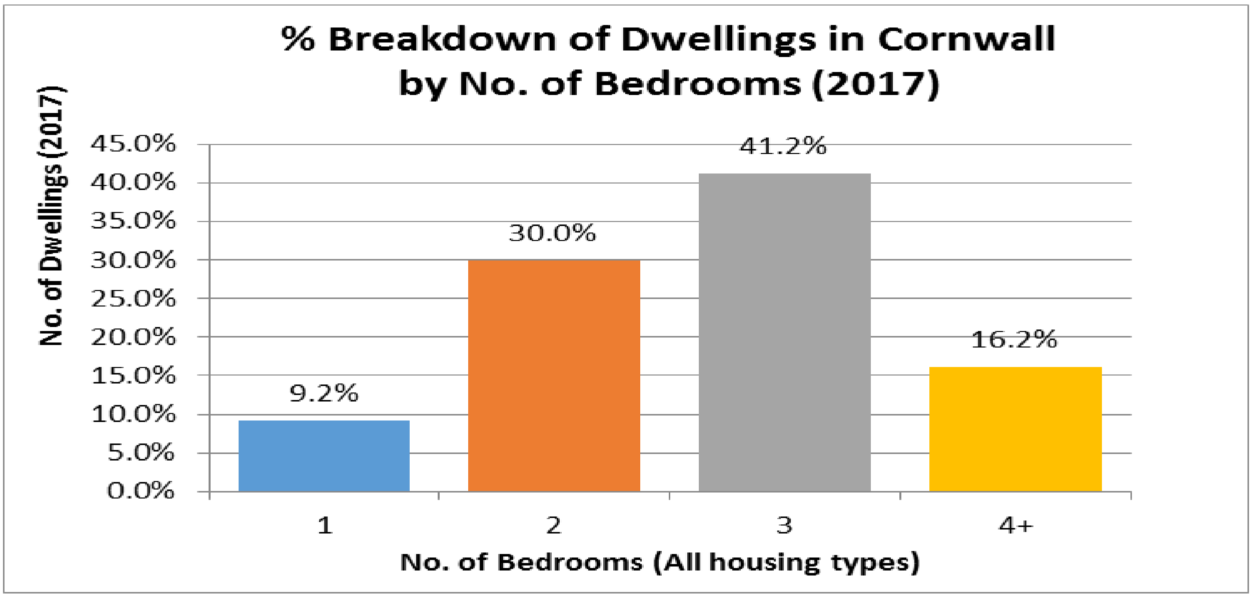


Overall, house type distribution in Cornwall remains largely unchanged in the past 3 years as can be seen below:



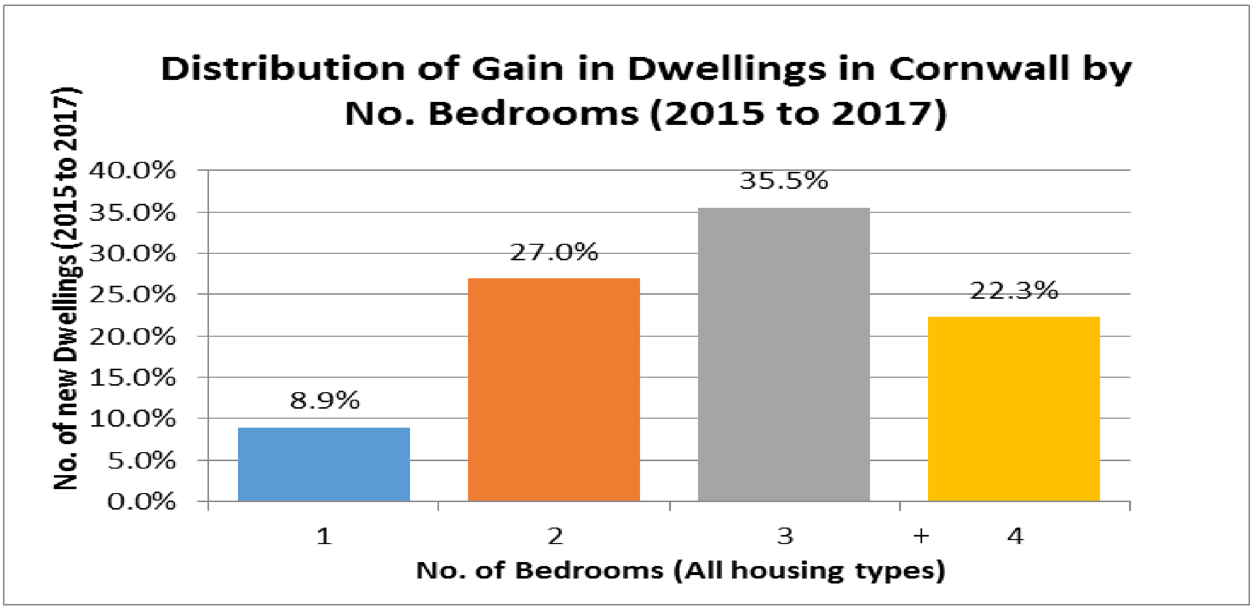
House size / Number of Bedrooms in Cornish Houses

Across all housing types, the breakdowns of Cornish housing stock in terms of number of bedrooms in 2017 are as follows:



The vast majority of housing in Cornwall then are 3 bedroom houses, with just under a third being 2 bedroom dwellings. (*Note that percentages do not sum to 100 as a number of dwellings have an unknown number of bedrooms*).

If we look at the difference between the total number of dwellings in these categories in 2015 and compare this to 2017 figures, we can see what the distribution looks like for 'new' houses built between these dates.



Comparing this then to the original breakdown of Cornish housing in 2017, we can see that while generally the distribution of new houses looks similar to that of new builds, there have been noticeably fewer 3 bed homes and more 4+ bed homes built since 2015. The provision of 1 and 2 bed houses has also dropped off slightly in comparison to existing housing stock.

The Cornwall-SHMA-Overview-Report-Oct 2013-Part 1 (Edge Analytics) notes that the growth in family households aged 25 – 44 years is likely to mean a sustained demand for 3 and 4 bedroom family homes.

The trend identified above then can be viewed as positive in this light. However, the report also emphases that with an increasingly aging population, projections show a noticeable increase in single person and couple households. With this in mind, it could be argued that a greater proportion of 1 and 2 bed houses should be included in new development schemes to accommodate this projected need. The report also notes that the high demand for 1 and 2 bed houses currently makes up around 82% of all affordable housing need.

Tenure Breakdown in Cornish Housing

The government publishes annual data on the number of dwellings by tenure in its live Table: 100. This is available here: https://www.gov.uk/government/statistical-data-sets/live-tables-on-dwelling-stock-including-vacants

This data provides information on rents provided by the LA and those provided by Private Registered Providers. However, the wider 'Private Sector' data that makes up the vast majority (approximately 88% of total housing) includes both owner-occupiers and private rents, and so is of limited use in determining the breakdown of tenure. However we can see that the number of LA rents since 2014 has decreased slightly while conversely, Private registered providers are providing more rents year on year.

Year	**LA rents** (incl. owned by other LAs)	**Private Reg. Provider Rents**	**Other public sector rents**	**Private sector** (Rents+ Owners)	**Local Authority Rents (%)**	**Private Reg. Provider Rents**	**Private sector (P R)**[1]
2013	10,520	18,600	740	231,400	4%	7%	89%
2014	10,490	19,170	740	233,130	4%	7%	88%
2015	10,460	19,560	700	234,850	4%	7%	88%
2016	10,390	20,730	790	238,950	4%	8%	88%
2017	10,420	21,180	790	241,550	4%	9%	88%

Unfortunately, LA level data on rents/owner occupied housing is not readily available (the only source being the census of 2011). As this is of limited use (now 7 years out of date and with no comparable dataset) it may be that the practicality of this indicator needs to be reassessed unless a source robust enough to allow annual comparisons can be found.

6.3	**Provision of Self Build and Custom Housing** (Last Updated: November 2018)

Original Indicator and notes:

6.3	Provision of self-build and custom build housing.	Number of self-build and custom build housing provided	Net increase

The intention to tracking a 'net increase' in this type of housing is impractical, as demolitions are unlikely to reference the fact that the dwelling was originally self-build. Instead, it is arguably more sensible to look at the demand of this housing type alongside the number of permissions that appear to fall within this category over time. Therefore the suggested amended wording for the indicator would be:

6.3	Provision of self-build and custom build housing.	Monitor the demand for self and custom build housing and the number of permissions approved	Trend over time

The revised wording brings the indicator in line with the demands of the Self- build and Custom Housebuilding Act 2015, by focusing instead on meeting the demand for self-build housing. This being the case a full answer to this indicator can be found in the Self and Custom Build Annual Monitoring Report.

Headlines:

- **Demand for 221 serviced plots was identified from the Self Build and Custom Housebuilding Register for 17/18**
- **The council identified 1,316 permissions that could reasonably be used for the purposes of self or custom house building, meaning just 17% of these would need to be available in order to meet demand.**
- **On that basis, it is judged that the council has met the demand for both this base period and each period since the register began (April 16)**

Demand

The Self-Build and Custom Housebuilding Register was established in April 2016 and has been available for people to submit details through Cornwall Council's online form. This has been used as the primary measure for demand for self and custom build housing. More details about the register are available in the full report.

In the self-build year (Nov 17- to end of October 18), 194 individuals registered interest in a self/custom build, in addition to 5 associations of individuals. 27 plots were outlined in the association registrations. This means that to meet the demand for the self-build year, approved development permissions for 221 serviced plots must be made in that period that could reasonably be utilised for self or custom builds. The government gives councils 3 years to meet this demand.

Supply

There were 759 sites granted permission for 1,316 homes on small sites of less than 10 dwellings during the self build year 17-18 (including a single permission for 12 homes included in the supply as it was specifically reserved for the provision of self-build). This would require just 17% (221/1,316) of these to be available for self-build or custom build to meet the demand for 194 plots from individuals and 27 plots for associations of individuals during this period itself.

This methodology relies solely on small developments of less than 10 to provide enough potential self-build plots to meet the demand, and it is recognised that other larger developments would likely also make a contribution. For example those developments with provision for self-build sites specifically referenced within the outline application would also contribute toward meeting the demand, as they will need to comply with policy 6 of the Cornwall Local Plan. However we have not considered these currently as the demand has already seen to have been met through the provision of smaller sites.

As with the other base periods, this is the 3rd base period forms year one in a new supply/demand calculation. In relation to this, the emerging cumulative picture is outlined below:

	Period Demand	Plots Identified in 1st year for Period	Plots Identified in 2nd year for Period	Plots Identified in 3rd year for Period	Total Plots identified in 3 years	% Plots required to meet demand within 3yrs (Total/Demand)
3rd Base Period	221	1,316	-	-	1,316	17%

Meeting Demand: Conclusion

Considering the above it is believed that Cornwall Council has granted planning permission for sufficient suitable serviced plots to meet the demand identified on the register in all base periods to date. The duty required by section 2A of the 2015 Self and Custom Housebuilding Act (as amended by the 2016 Housing and Planning Act) is therefore considered to have been met.

8.1	Affordable Homes: on sites of more than 10 and on sites of between 6 and 10 in rural parishes.

Original Indicator and notes:

8.1	Affordable housing provision to meet needs	Number of affordable homes provided: (i) on sites where dwellings would have a combined gross floorspace of more than1000 square metres; or (ii) on sites with a net increase of 10 dwellings 8.1a Amount of contribution towards affordable housing provision on sites of 6 to 9 dwellings in rural parishes	To attain a contribution towards affordable housing provision on all development with a combined gross floor space of more than 1000 square metres or on sites with a net increase of 10 or more dwellings or on sites of 6 or more dwellings in rural areas

On assessing the proposed indicator it is clear that the affordable housing threshold is actually **more than ten** dwellings (as opposed 10 or more as stated). This also affects monitoring of the rural target, which would be between 6 and 10 dwellings as opposed 6 to 9.

Additionally, it became clear that it would not be practical to report against a gross floorspace threshold as at this point this information is not collected in a measurable way. Therefore a revised indicator would be as follows:

8.1	Affordable housing provision to meet needs	8.1a Number of affordable homes provided on sites with a net increase of more than 10 dwellings 8.1b Amount of contribution towards affordable housing provision on sites of 6 to 10 dwellings in rural parishes	To attain a contribution towards affordable housing provision on all development on sites with a net increase of more than 10 dwellings or on sites of 6 or more dwellings in rural areas

Headlines:

- **During the year 2016-17 there were 748 affordable homes completed on sites of more than 10 dwellings (39.1%)**
- **During the year 2017-18 there were 845 affordable homes completed on sites of more than 10 dwellings (36%)**

8.1a Affordable Homes on Sites with more than 10 dwellings

In 2017-18, 845 affordable homes were completed on sites of more than 10 dwellings. Completions on these sites (affordable homes plus open market homes) totalled 2,346; meaning that affordable homes made up approximately 36% of all completions in the category for the year. This is down slightly on the previous year, where over 39% of completions in this category were affordable.

Examining post-adoption permissions in 2016-17 for Affordable Housing

Since the Local Plan was adopted in November 2016 and up until the end of the financial year (31st March 2017), planning permission was granted on 36 sites of 11 or more homes with the potential to provide 936 affordable homes. 12 of the sites appeared not to include any affordable housing as part of the development proposal. However in 2 of these cases affordable housing provision was already included in an earlier phase of the development. A financial contribution was received in lieu of provision in a further two cases. Four sites were exempt from making any provision due to the nature of the development (for example there was already a lawful residential use on the site or it was a prior approval application), two of these were found to be administration errors and in the final two cases it was demonstrated that it was not viable to provide any affordable housing.

Examining post-adoption permissions in 2017-18 for Affordable Housing

During the first full planning year post adoption, planning permission was granted on 72 sites of 11 or more homes with the potential to provide 1,971 affordable homes. 16 of the sites appeared not to include any affordable housing as part of the development proposal. In 6 of these cases a financial contribution was received in lieu of on site provision. In 3 cases the affordable housing was provided via a linked site or on an earlier phase of the development. 1 case was exempt as it was providing accommodation classed as a C2 use, 2 cases were shown to be not viable if affordable housing was provided and finally in 4 cases the benefits of the proposal was considered to outweigh the fact that no affordable housing was provided.

8.1b Affordable housing contribution on rural sites of 6 to 10 dwellings

In 2016-17, 738 homes were proposed in rural parishes on sites of between 6 and 10 dwellings. Of these, 142 were affordable homes (19.2%). Just 11 planning permissions were granted in rural areas from Local Plan adoption to the end of the year in this category. In three of these cases affordable housing was provided as they were affordable housing led exceptions schemes.

Of the remaining 8 cases one development was actually for 5 units and so was actually below the threshold and included in error. Four were not in 'designated' rural areas as required by the policy and so again would not be included. One development made a financial contribution and in the remaining two cases it was deemed not viable to make any contribution. Therefore within the period, no sites failed to provide affordable housing or a contribution towards affordable housing where it was deemed appropriate.

In 2017-18, 159 homes were proposed in rural parishes on sites of between 6 and 10 dwellings. Of these, 20 were affordable homes (13%). During the year, 19 planning permissions granted in rural areas on sites of 6-10 dwellings. In 4 of these cases affordable housing was provided. Of the remaining 15 sites, 5 made an off-site financial contribution. 7 were not in 'designated' rural areas and so would not be included towards the measure. The remaining 3 sites have notably specific circumstances for not providing affordable housing; one being an innovative self-build scheme (with 3 plots to be sold at 50% market value); another relating to a very old outline permission that pre-dates the affordable housing requirement, and another being a certificate of lawful use establishing residential use on a site used for this purpose for more than 10 years. Therefore again in this period, no sites in the category failed to produce either affordable housing or a contribution towards affordable housing in line with the policy.

8.3	Amount of affordable housing provided on sites meeting the minimum threshold by Zone

Original Indicator and notes:

8.3	Affordable housing provision to meet needs	Amount of affordable housing provided on sites meeting the minimum threshold by Zone	All new housing developments above the affordable housing threshold to meet the minimum percentage of affordable housing for the appropriate zone: 50% in zone 1, 40% in zone 2, 35% in zone 3, 30% in zone 4 and 25% in zone 5.

Headlines:

- **The majority of existing permissions were granted prior to the adoption of the Local Plan and so judgements regarding meeting the target would not yet be valid. Initial data has only been gathered as a snapshot for comparison.**
- **Alternative datasets to monitor delivery of affordable housing may be examined in the future.**

Affordable Housing by Zone: Planning Permissions

The 'minimum threshold' noted in the indicator refers to all sites that aim to supply more than 10 homes. These developments are the focus of the analysis for this indicator.

The table below examines affordable housing permissions by value zone, and how the distribution of housing on these sites compare against the zone targets identified in the Local Plan:

Data for 2017

ZONE	AH ZONE THRESHOLD	TOTAL SITES >10 IN ZONE	TOTAL SITES >10 IN ZONE MEETING THRESHOLD	% SITES >10 MEETING AH ZONE THRESHOLD
1	50%	11	5	45%
2	40%	19	9	47%
3	35%	83	24	29%
4	30%	118	76	64%
5	25%	80	51	64%

Data for 2018

ZONE	AH ZONE THRESHOLD	TOTAL SITES >10 IN ZONE	TOTAL SITES >10 IN ZONE MEETING THRESHOLD	% SITES >10 MEETING AH ZONE THRESHOLD
1	50%	11	5	45%
2	40%	19	9	47%
3	35%	80	20	25%
4	30%	114	71	62%
5	25%	78	44	56%

It must be recognised that in its current form, this data comes with a number of caveats. Exception sites for example are included in these figures. Also, it is likely that some developments may have made financial contributions to affordable housing in lieu of delivering affordable housing units. This information is not available using the current dataset, but is something the council hope to examine soon. Also noteworthy is that the majority of these permissions were approved prior to the adoption of the Local Plan, and at this point in time these value zones will have not been recognised. These issues notwithstanding, the table does provide a useful benchmark on current proposals which can be compared to future data.

Examining the tables, it seems affordable housing targets are currently lagging in zone 3 particularly, with zones 4 and 5 performing more favourably (albeit against a smaller target).

Affordable Housing by Zone: Completed Homes

While the tables above examines the proposals for affordable homes in each zone, the tables below indicate how many affordable homes have been completed in the same period for developments that aim to reach the threshold of looking to provide more than 10 homes. Note that the figures below are restricted to only those sites that have completed at least one unit during the financial year.

Data for 2017

ZONE	ZONE THRESHOLD	TOTAL SITES >10 IN ZONE WITH AT LEAST 1 COMPLETION	TOTAL SITES WITH % AH COMPLETED MEETING THRESHOLD	% AH COMPLETED (AH/AH+OM Completions)	NO. AH COMPLETED ON SITES >10
1	50%	3	2	67%	43
2	40%	6	1	17%	23
3	35%	26	8	31%	150
4	30%	41	19	46%	306
5	25%	26	13	50%	226

Data for 2018

ZONE	ZONE THRESHOLD	TOTAL SITES >10 IN ZONE WITH AT LEAST 1 COMPLETION	TOTAL SITES WITH % AH COMPLETED MEETING THRESHOLD	% AH COMPLETED (AH/AH+OM Completions)	NO. AH COMPLETED ON SITES >10
1	50%	7	1	14%	28
2	40%	4	1	25%	20
3	35%	25	5	20%	106
4	30%	43	22	51%	343
5	25%	32	16	50%	348

This data is subject to the same caveats as the permissions data outlined above. It must also be recognised that this represents actual delivery on sites to date, as opposed the arguably more important metric of what is going to be built in total. These tables show how many sites that have been generating completions during each year will be meeting the required level of affordable housing in that value zone.

11	**Gypsy and Traveller site provision – Refusals** (Last Updated: December 2018)

Original Indicator and notes:

11	Gypsy and Traveller site provision	Number and proportion of applications refused on grounds of not complying with policy	All residential and transit site developments meeting the requirements of the policy

It has been interpreted that for this indicator, any refusal would equate to a refusal on the grounds of 'not complying with policy'.

Headlines:

At the time of writing, three permissions have been refused since adoption of the Local Plan.

Site	Pitches	Date Refused
Little Meadows Arbour	6	27/07/2017
Land South East Of Minorca Lane	4	07/07/2017
Land Off Hallaze Road	3	17/01/2018

14	**Increase renewable energy consumption** (Last Updated: September 2018)

Original Indicator and notes:

14	Increase renewable energy consumption	Amount of: (i) renewable energy capacity and low carbon energy generation installed; (ii) useable heat generation capacity installed

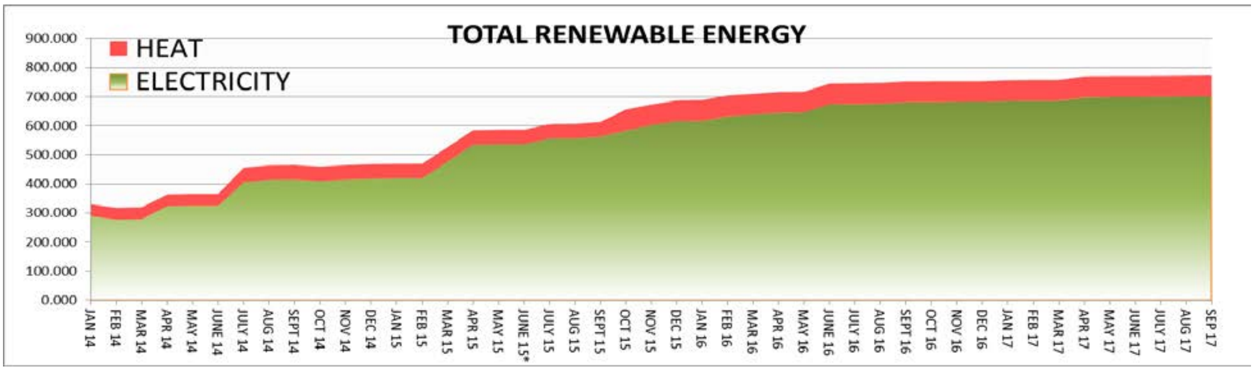
Headlines:

i) **Installed capacity for renewable energy has continued to steadily increase since adoption of the Local Plan. While not increasing at the rate seen in previous years, the capacity for wind and solar energy has gradually increased, and the capacity of other renewable energy sources has remained consistent. From May 2017 the Cornwall Energy Recovery Centre also began to generate around 20 megawatts of energy from waste.**

ii) **Since the adoption of the Local Plan, usable heat generation capacity has remained unchanged. Permitted but not yet operational capacity that was previously outlined to provide energy from waste has decreased by 78 megawatts. This was as a result of the permitted export of heat by the Cornwall Energy Recovery Centre not being implemented. This figure was therefore removed from the permitted but not operational category.**

Context:

The installed capacity for renewable energy since January 2014 is shown below, taken from monthly reports. There is an observable upward trend over time as net capacity has increased, however there has been a notable slowing in growth since last June.



15	**Number or proportion of applications refused on grounds of potentially effecting renewable energy capacity of existing installations** (Last updated December 2018)

Original Indicator and notes:

15	Protection of renewable energy installations	Number or proportion of applications refused on grounds of potentially effecting Renewable energy capacity of existing installations	100%

As at the time of writing, there have been no planning applications refused on the grounds of potentially effecting renewable energy capacity.

17.1	**Mineral production (tonnes) of various sectors** (Last Updated: December 2018)

Original Indicator and notes:

17.1	Development principles	Mineral production (tonnes) of various sectors (primary aggregates, secondary / recycled aggregates, building stone, china clay and metalliferous minerals) in the county	• Primary aggregate production in line with the annual Local Aggregates Assessment • Net increase in the production of secondary/recycled aggregate

Headlines:

Mineral Sector	2016 Sales	2017 Sales
Primary Aggregates	1,364,679	1,432,227
Secondary Aggregates	1,608,826	1,973,090
Recycled Aggregates	311,248.3*	344,177*
Building Stone	27,035	44100.85
China Clay	1,090,000**	1,014,000**
Metals	Not available***	Not available***

**Estimate*

***Figure from 2014 (2016 Sales), Figure from 2015 (2017 Sales)*

**** Data not available due to commercial confidentiality*

Primary Aggregates

Primary Aggregate production during the last 10 years has been around the same level apart from a decrease in sales in 2009 and 2010. Taking the 10-year period 2008–2017, average annual sales of primary crushed rock aggregate was 1.43 million tonnes. Further information on primary aggregate sales and production can be found in the latest Local Aggregate Assessment at www.cornwall.gov.uk/mineralsdpd

Secondary Aggregates

Sales of secondary aggregates during 2017 totalled approximately 2 million tonnes compared with a peak of 2.39 million tonnes in 2007. In 2017 nearly all (over 96%) of the secondary aggregate material sold was china clay waste, the remainder being slate waste and aggregate derived from the Cornwall Energy Recovery Centre (CERC). Further information on primary aggregate sales and production can be found in the latest Local Aggregate Assessment (LAA) at www.cornwall.gov.uk/mineralsdpd. Data from the LAA, shows that secondary aggregate sales have remained similar since 2011.

Recycled Aggregates

A survey of waste operators known to produce recycled aggregates was carried out for 2016. However, no responses to the survey have been received. Without this information, it was considered that an alternative approach would be to use the Environment Agency's Waste Interrogator 2017 data to calculate a figure for recycled aggregate. Further information on the methodology can be found in the latest Local Aggregate Assessment (LAA) at www.cornwall.gov.uk/mineralsdpd. Data, in the LAA, shows that recycled aggregate has remained similar over the past 5 years.

Building Stone

The production of building stone over the last few years has decreased. The current level of production for 2017 was 44,100 tonnes. Building stone is produced from some 8 operational quarries producing solely granite, slate and gritstone for building materials and 7 quarries that produce building stone alongside their primary aggregate production.

China Clay

Only one china clay company is currently operating in Cornwall. Due commercial confidentiality a figure for this cannot be disclosed. However, The BGS Minerals Yearbook, 2015 estimated that production for the UK of china clay in 2015 amounted to 1,014,000 tonnes (dry weight). Commercial exploitation of the china clay in Cornwall is now confined to the western and central parts of the Hensbarrow (St Austell) granite.

Metalliferous Minerals

Only one metalliferous site is currently extracting ore in Cornwall (Blue Hills, St Agnes). As this is the only site, due to commercial confidentiality the production figure for metalliferous minerals cannot be disclosed.

18	**Safeguard Mineral Reserves:** (Last Updated: December 2018)

Original Indicator and notes:

18	Safeguard Minerals reserves	Number of applications granted on safeguarded mineral sites identified as causing the sterilization of the mineral reserves	No net loss to sites safeguarded for their mineral reserves

Headlines

- **There has been no net loss to sites safeguarded for their mineral reserves.**

19.1	**Capacity of existing and new waste management facilities** (Last Updated: December 2018)

Original Indicator and notes:

19.1	Development Principles	Capacity of existing and new waste management facilities: i) Transfer stations; ii) Composting; iii) Recycling; iv) Energy from Waste v) Landfill	Annual net increase

Note that this indicator is for the maximum capacity that the site can accept each year and not an indication of the actual throughput. Throughput is shown in indicators 19.2 and 19.3.

Headlines:

- **Waste capacity has remained relatively similar for Transfer Stations and Composting. A small drop has occurred for recycling that will need careful monitoring. Landfill capacity has dropped as anticipated, with waste being diverted away from landfill and the opening of the Cornwall Energy Recovery Centre. This reduction in landfill is in accordance with the waste hierarchy and is supported by Local Pan and National Policy. However, some capacity for residual waste will still be required.**

- **The tonnage of landfilled waste in year 1 (2017) and year 2 (2018) is outlined in the table below:**

Capacity of Waste Management Facilities	2017 Tonnage	2018 Tonnage
Transfer stations	2,284,034	2,237,318
Composting	139,998	139,498
Recycling	681,274	618,795
Energy from Waste	0	240,000
Landfill	2,468,721	1,299,830

Source:

The data is taken from the Environment Agency's Environmental Permitting Regulations Waste Operations. Capacity data is provided in tonnes, for all waste streams and relates to the May 2017 and October 2018 Environmental Permitting Regulations Permit Register. This represents the capacity of waste management facilities as of May 2017 and October 2018.

The capacity data is not exhaustive, as certain operations are exempt from the Environmental Permitting Regulations and therefore do not require a permit from the Environment Agency. The data set out is the annual capacity of waste operations and does not take into account any planning permission restrictions such as operating hours, vehicle movements etc. There may be an element of double counting, as some facilities may have different permits for different operations.

19.2	**Amount of waste: a) Recycled, b) Composted, c) Used in energy production, d) Transfer Stations** (Last Updated: December 2018)

Original Indicator and notes:

19.2	Development Principles	Amount of waste: a) Recycled(metal recycling and Material Recycling Facilities) b) Composted c) Used in energy production d) Transfer Stations	Annual net decrease

Headlines:

A net increase of throughput has occurred between 2016 and 2017 for all types of processing of waste.

- **The tonnage of landfilled waste in year 1 is outlined in the table below:**

Waste Usage	2016 Tonnage	2017 Tonnage
a) Recycled (Metal Recycling Sites and MRFs)	142,454.611	146,375
b) Composted	63,819.79	71,013
c) Used in energy production	0	190,644
d) Transfer Stations	344,499.72	365,270

Source:

The data is taken from the Environment Agency's Waste Data Interrogator 2017. The throughput data is provided in tonnes, for all waste streams and relates to the Waste Data Interrogator 2017. The data is not exhaustive, as certain operations are exempt from the Environmental Permitting Regulations and therefore do not require a permit from the Environment Agency. The data set out is the annual throughput of waste operations. There may be an element of double counting, as some facilities may have different permits for different operations. Annual data refers to the calendar year January to December.

19.3	**Amount of waste landfilled by (i) households and ii) commercial and Industrial.** (Last Updated: December 2018)

Original Indicator and notes:

19.3	Development Principles	Amount of waste landfilled by (i) households and ii) commercial and Industrial.	Annual net decrease

Headlines:

- **There has been a considerable net decrease in landfilled waste and therefore the target for the monitoring indicator is being achieved. This decrease was anticipated as a result of waste being diverted away from landfill to the Cornwall Energy Recovered Centre.**

- **The tonnage of landfilled waste in year 1 is outlined in the table below::**

Landfilled Waste	2016 Tonnage	2017 Tonnage
(i) Household Waste	171,742	115,839
(ii) Commercial & Industrial Waste	54,102	17,898

Source:

The data is taken from the Environment Agency's Waste Data Interrogator for 2016 and 2017 as well as household waste data provided by Cornwall Council Waste Management for both 2017 and 2017.

The throughput data is provided in tonnes, for all waste streams and relates to the Waste Data Interrogator (2016 & 2017). Data provided by Cornwall Council Waste Management is for year 2016 & 2017.

The throughput data from the Waste Data Interrogator is not exhaustive, as certain operations are exempt from the Environmental Permitting Regulations and therefore do not require a permit from the Environment Agency. The data set out is the annual throughput of waste operations. There may be an element of double counting, as some facilities may have different permits for different operations.

Annual data refers to the calendar year January to December.

20.1	**Number and proportion of applications for new waste management facilities approved on policy grounds** (Last Updated: December 2018)

Original Indicator and notes:

20.1	Development Principles	Number and proportion of applications for new waste management facilities approved on policy grounds	100%

Headlines:

- **100% of waste new management facilities approved on policy grounds since adoption of the Local Plan (Post October 16). None refused.**

Permissions:

Reference	Status	Address	Proposal	Decision
PA16/12087	Approved with Conditions	Trebarwith Road Rustic Quarry Trebarwith Road Delabole Cornwall PL33 9DE	Change of use of part agricultural building (Building A) to general industrial for waste transfer unit and plant storage.	17.02.2017
PA17/02339	Approved with Conditions	East Helescott Farm Marhamchurch Bude Cornwall EX23 0NE	Installation of an agricultural anaerobic digestion facility and associated plant and equipment including underground pipework, digestate lagoon, site access road and landscaping	23.08.2017
PA17/02955	Approved with Conditions	Land North West Of Pennans Farm Grampound Truro Cornwall TR2 4RQ	Installation of an agricultural anaerobic digestion facility and associated plant including access off the A390 and landscaping	12.09.2018
PA17/06497	Approved with Conditions	Tynes Quarry St Teath Bodmin PL30 3LR	Part retrospective application to provide Office, weighbridge, staff welfare block, parking, hardstanding, bunding and other ancillary developments in connection with both the quarrying and waste transfer station activities already approved at the site	11.12.2017

21.1	**The amount (%) of residential development provided on previously developed land** (Last Updated July 18)

Original Indicator and notes:

21.1	The efficient use of land	The amount (%) of residential development provided on previously developed land.

Source: Cornwall Council Housing Trajectory

Headlines

The percentage of residential development on previously developed land has decreased slightly each year since 14-15, but has recently returned to this level. The decrease here may be due to a corresponding decrease in available sites, and so the increased percentage in 17-18 can be seen as positive in that more previously developed land is being utilised for new developments.

2014-15	2015-16	2016-17	2017-18
41% (1,113/2,702)	**38%** (965/2,536)	**37%** (1,152/3,074)	**41%** (1,405/3,429)

Breakdown by Community Network Area

Below is a breakdown of housing on previously developed land by Community Network Area over time:

Community Network Area	2014-15	2015-16	2016-17	2017-18
Bodmin	13%	20%	27%	50%
Bude	14%	18%	30%	33%
Camborne, Pool & Redruth	38%	57%	48%	59%
Camelford	27%	53%	34%	49%
Caradon	12%	22%	37%	20%
China Clay	37%	46%	24%	44%
Cornwall Gateway	52%	67%	62%	16%
Falmouth & Penryn	33%	37%	54%	38%
Hayle & St Ives	60%	51%	46%	14%
Helston & the Lizard	25%	22%	43%	44%
Launceston	10%	62%	19%	9%
Liskeard & Looe	36%	20%	14%	23%
Newquay & St Columb	23%	21%	30%	34%
St Agnes & Perranporth	63%	35%	19%	18%
St Austell	81%	31%	32%	55%
St Blazey, Fowey & Lostwithiel	10%	13%	40%	38%
Truro & Roseland	56%	49%	49%	50%
Wadebridge & Padstow	43%	59%	35%	33%
West Penwith	65%	49%	62%	64%
TOTAL	41%	38%	37%	41%

Note: For monitoring purposes, the few houses built on land that is part previously developed and part undeveloped have not been included in the figures.

23.3	**Percentage of SSSIs in a favourable or recovering condition** (Last updated: June 2018)

Original Indicator and notes:

23.3	Protection of the natural environment	% of SSSIs in a favourable or recovering condition	Improve

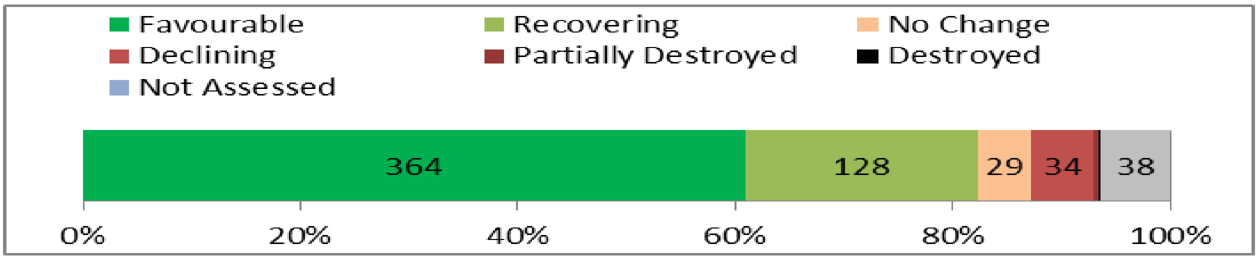
Source: https://designatedsites.naturalengland.org.uk/SearchCounty.aspx
SSSI: Sites of Special Scientific Interest

Headlines:

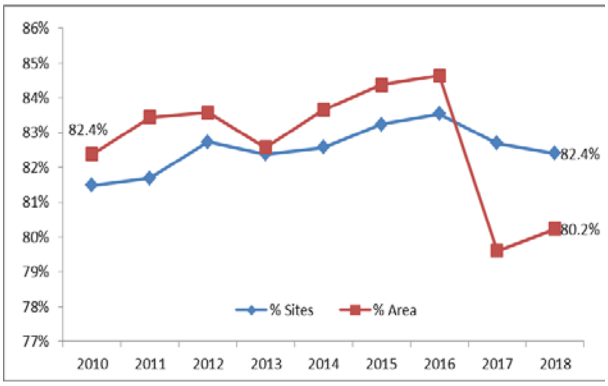
- **The percentage of SSSI sites in a favourable or recovering position at the time of writing is 82%. (83% last year). This represents a decline in comparison to the baseline (2011-2013) of 2%. Comparing this year to the previous year in isolation, there has been a 0.6% improvement.**
- **There was a relatively poor year in 2017; where the percentage of sites assessed as favourable/recovering was just 58% by year end (44% of the total area). 2018 has seen improvement, with 74% of sites and 94% of the area assessed as favourable/recovering so far.**
- **Since 2010, the percentage of sites assessed as favourable or recovering has been rising, but this has dropped off slightly in the last two years.**

Current Picture and Historical Trend:

As at June 2018, the distribution of SSSI conditions in Cornwall were as follows:



While the raw figures above provide a snapshot, the measure generally referred to is the percentage of sites assessed as favourable or recovering. It is worth nothing that the official methodology includes sites not assessed in the denominator, meaning they essentially count against the 'favourable or recovering' measure. An alternative method is outlined in the appendix. Using this method, the overall trend suggests since 2010 the percentage of sites assessed as favourable or recovering has been rising.



The graph on the left outlines the percentage of sites (and area % of those sites) judged to be in a favourable or recovering position.

A general rise is observable by both measures, but both have dipped since 2017 where sites assessed in that year were generally found to be of poorer condition. 2018 has been better, though not enough to bring the total back to pre-2017 levels.

23.4	Number of new dwellings approved in the landscape designations AONB and Heritage Coast

Original Indicator and notes:

23.4	Protection of the landscape	Number of new dwellings approved in the landscape designations AONB and Heritage Coast	Report Trend

Headlines:

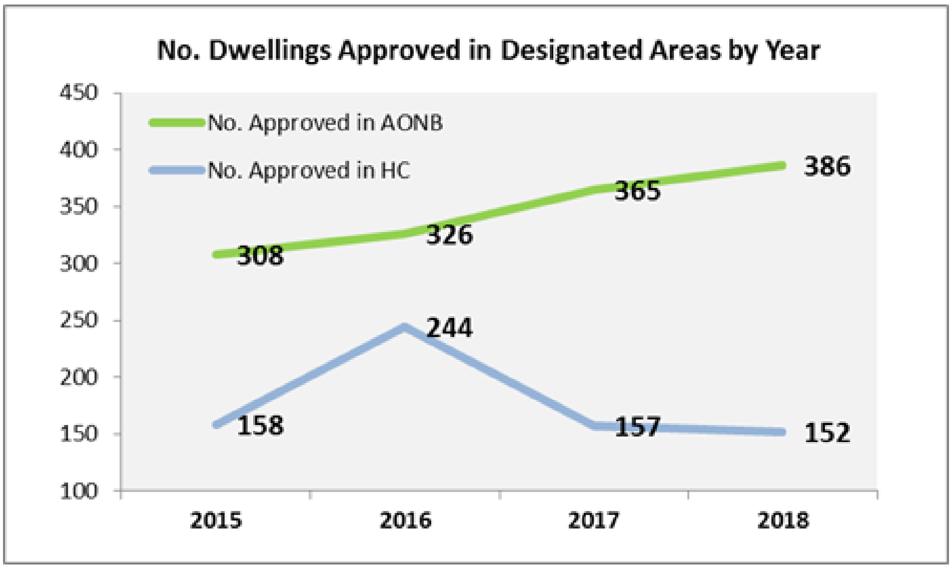
- **3% of dwellings approved in 16-17 were in an AONB. This rose to 6% in 2017-18, though equated to a similar number of dwellings (365 and 386 respectively)**
- **1% of dwellings approved in 16-17 were in the Heritage Coast. This rose to 2% in 2018, though as with the AONB indicator, equated to a similar number of dwellings (157 and 152 respectively)**
- **In the past two years of monitoring the vast majority of permissions approved in AONB complied with policy**
- **Number of new dwellings approved in AONB incrementally rising over last three years**
- **Number of new dwellings in Heritage Coast falling post Local Plan adoption**

Current Picture:

Data from the last three years housing trajectories has been mapped against the AONB and HC designation areas to see how many approved applications have been made, how many dwellings this equates to and exactly where in the county these builds are concentrated.

The data has been aggregated by both Parish and Community Network Area, giving an impression of both the volume of local development in these areas and the trend for development over time.

The chart below outlines permissions for dwellings granted in Areas of Outstanding Natural Beauty and the Heritage Coast over the past 4 years. It shows the number of dwellings that the approved applications will eventually equate to, and includes both permissions approved and those approved on appeal within each financial year.



Dwellings approved in AONB

The above can be seen to indicate a steady increase in the number of dwellings granted permission in Areas of Outstanding Natural Beauty in the last 4 years. It is worth nothing though that an element of this is likely to occur given the council's commitment to Local Plan Policy 2.6 (New Housing Provision) – where the council is looking to deliver a minimum of 52,500 dwellings within the plan period.

The number of dwellings approved within this designation grew 5.8% from 2015 to 2016, and 12% from 2016 to 2017; seeing the rate of growth rise by 6.1% overall post adoption of the Local Plan. It is worth noting however that all applications approved in 2016 were approved prior to adoption of the Local Plan and so this policy would not have been in effect. 2018 has also seen the percentage growth of year to year approvals in the designation fall back to 5.8%. Although more dwellings continue to be built in the AONB each year then, the rate of this increase appears to have slowed.

When looking at where in Cornwall development in these designated areas is taking place, the majority of dwellings appear to be being proposed in the Helston & the Lizard area, with similar levels approved in Falmouth & Penryn. West Penwith has the next highest level of approved dwellings in AONB. A breakdown of approvals by both Community Network Area and Parish can be found in the appendices.

Dwellings approved in AONB (Context)

In 2017-18 permission for 6,650 dwellings were approved to be built in Cornwall. Of these, 386 were approved to be built in the AONB (6%). In 2016-17, just 3% were approved to be built in an AONB, although the increase here is largely due to comparatively more approvals overall in 16-17 (10,557), effectively diluting the AONB percentage for that year. The actual rise in dwellings approved in the AONB from year to year only equates to 21 more homes. This compares to 4% of approvals in the AONB in 2015 (308/7,541) and 5% in 2016 (326/6,792); illustrating a slight decline in development in these designated areas over the past 4 years when looking at percentages of overall developments, and a slight increase year on year when looking at the number of actual dwellings. However for 17-18, both the number of dwellings approved in the AONB and the percentage of approvals in that designation experienced a rise.

Examining those dwellings approved in Areas of Outstanding Natural Beauty gives us an impression of the type of dwellings being approved and some context surrounding these decisions.

Policy 23 states that permission will be refused for major development in the AONB unless there are exceptional circumstances and it is in the public interest. Whether or not a development is major for the purposes of this policy is determinant on its scale in relation to the size of settlement. The table below outlines the size of those approved developments for 2016-17 and 2017-18 respectively:

2016-17 Approvals in AONB

	Sites of 1-2 Dwellings	Sites of 3-9 Dwellings	Sites of 10+ Dwellings
Sites & No. of Dwellings	193 Sites (217 Dwellings)	21 Sites (90 Dwellings)	2 Sites (58 Dwellings)
% of Sites Approved in AONB	89%	10%	1%

2017-18 Approvals in AONB

	Sites of 1-2 Dwellings	Sites of 3-9 Dwellings	Sites of 10+ Dwellings
Sites & No. of Dwellings	206 Sites (232 Dwellings)	18 Sites (76 Dwellings)	1 Site (78 Dwellings)
% of Sites Approved in AONB	91.6%	8%	0.4%

The vast majority of approvals for dwellings in the AONB (89% in 16-17 and 92% in 17-18) were for small sites of only 1-2 dwellings. Just two sites were granted permission for 10 or more homes in 2017, and only one permission of this kind was approved in 2018. The context of these individual decisions are outlined below and confirm that over the last year the vast majority of permissions complied with policy.

App.No.	Location	Year Approved	No. Homes	Explanation of decision
PA15/ 00889	Coverack (Helston & South Kerrier CNA)	2017	14	The development in relation to the village of Coverack was not considered to be major in terms of scale. There was not considered to be harm in terms of impact on the landscape as the development was more related to the village as opposed open countryside.
PA15/ 09452	Mawnan Smith (Falmouth & Penryn CNA)	2017	46	A valid outline permission had already been granted on appeal and therefore the principle of development had already been established. The inspector at the appeal considered the site was a major development but concluded that it was in the public interest and exceptional circumstances existed having regard to the tests set out in national policy.
PA16/ 06906	Falmouth (Falmouth & Penryn CNA)	2018	78	The development was not considered to be major development in this context. The proposal is to replace existing holiday chalets with residential caravans and will result in an improvement of the site from a semi derelict state to a new well designed and well managed landscape. In landscape and visual terms the proposal was considered beneficial.

Dwellings approved in the Heritage Coast

The trend for housing development in the Heritage Coast differs from that of Areas of Outstanding Natural Beauty, as there has been an observable decrease in the number of dwellings approved on the Heritage Coast post adoption of the Local Plan. After a sharp rise in 2016 (54% rise from 2015-16 to 2016-17), the figures have dropped 38% the following year (post adoption), to return close to the level of approvals in 2015.

As with the AONB figures, in 2016 all approvals for dwellings in the Heritage Coast were approved prior to adoption of the Local Plan, and therefore assessing any impact of policies is not complicated by any 'before and after' split within that year. For these purposes, 2017 can be seen as 'post adoption'.

West Penwith has by far the most dwellings approved in the Heritage Coast; 296 dwellings in the past 4 years. The next highest Community Network area in contrast has 136 (Helston & the Lizard) approved dwellings; the majority of which approved prior to adoption of the Local Plan.

Dwellings approved in Heritage Coast (Context)

Of the dwellings approved to be developed in 2017-18, just 2% were approved to be built on the Heritage Coast. In 2016-17, just 1% were approved to be built within this designation. This compares to 2% in 2015 (158/7,541) and 4% in 2016 (6,792/244); illustrating a decline in the last year back to 2015 levels, especially when looking at the number of dwellings, with just 152 dwellings in this category approved in 2018, the lowest since 2015 (when monitoring began).

A note on CNA and Parish level breakdowns

When at CNA or parish level, figures must be considered alongside the geographical profile of the area. For example a sharp rise might initially be interpreted as a failure of policy to protect Areas of Outstanding Natural Beauty. However this might occur where a large proportion of the land has this designation. This being the case, it may be that delivery of any level of housing at all within the area is likely to result in development in an AONB. Therefore a balanced view must be taken between policies 23.4 (Number of new dwellings approved in the landscape designations AONB and Heritage Coast) and the larger Policy 2.6 (New Housing Provision) – where the council is looking to deliver a minimum of 52,500 dwellings within the plan period. CNA and parish level figures are available in the Appendix.

23.5	**Number of applications approved for wind turbines and Solar Farms in the landscape designations AONB and Heritage Coast** (Last updated: June 2018)

Original Indicator and notes:

23.5	Protection of the landscape	Number of applications approved for wind turbines and Solar Farms in the landscape designations AONB and Heritage Coast	Report Trend

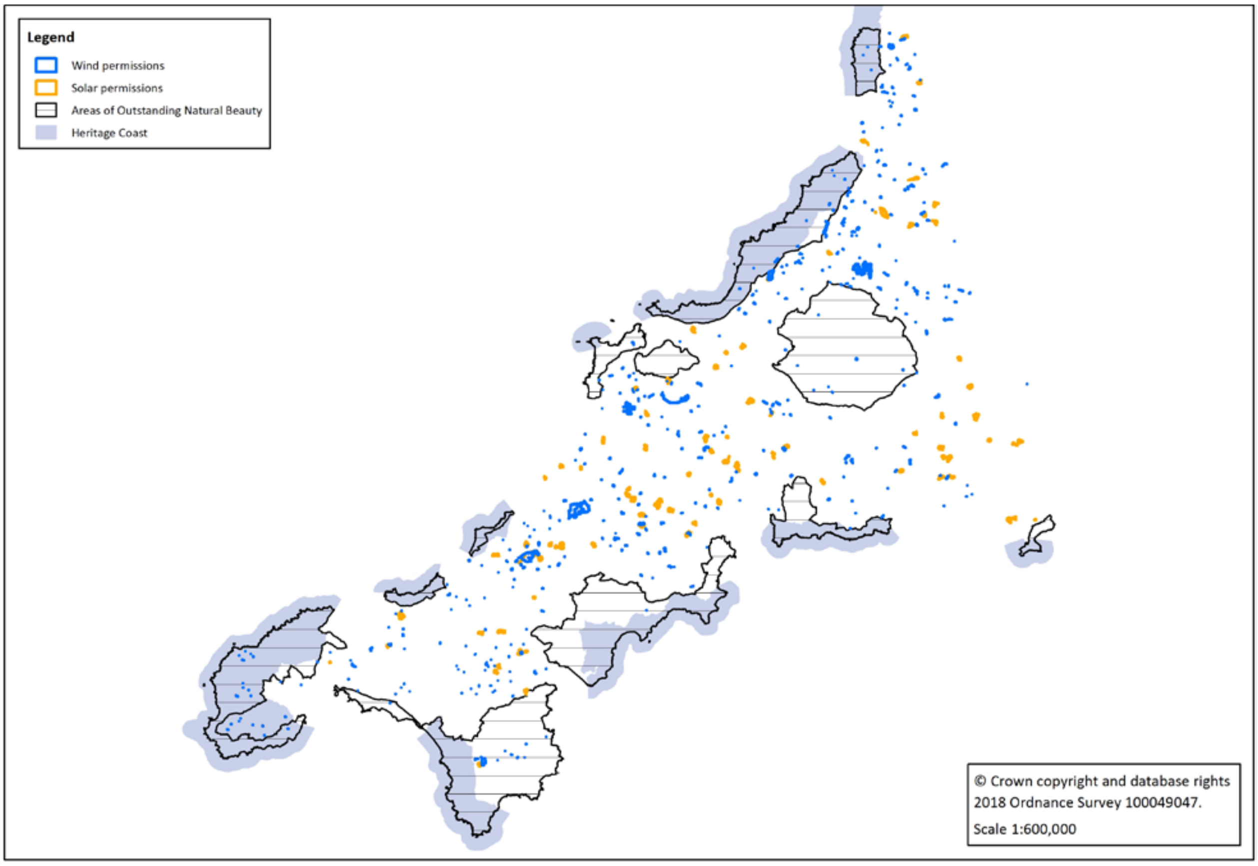
Headlines:

- **Over the past 4 years, no applications for solar farms have been approved on either AONB or Heritage Coast designation areas.**

- **Over the past 4 years, no applications for wind turbines have been approved on either AONB or Heritage Coast designation areas.**

Current Picture:

It appears that this policy indicator is being met, and neither wind turbines nor solar farms are currently being approved within these designations. In 2013-14, a relatively large number of permissions (83) were approved for the construction of wind turbines, and during this period 9 were approved in an AONB and 4 in on the Heritage Coast. Since then, no applications in these areas have been approved.
The map below illustrates the location of both forms of renewable energy against the protected designations, regardless of when they have been approved.

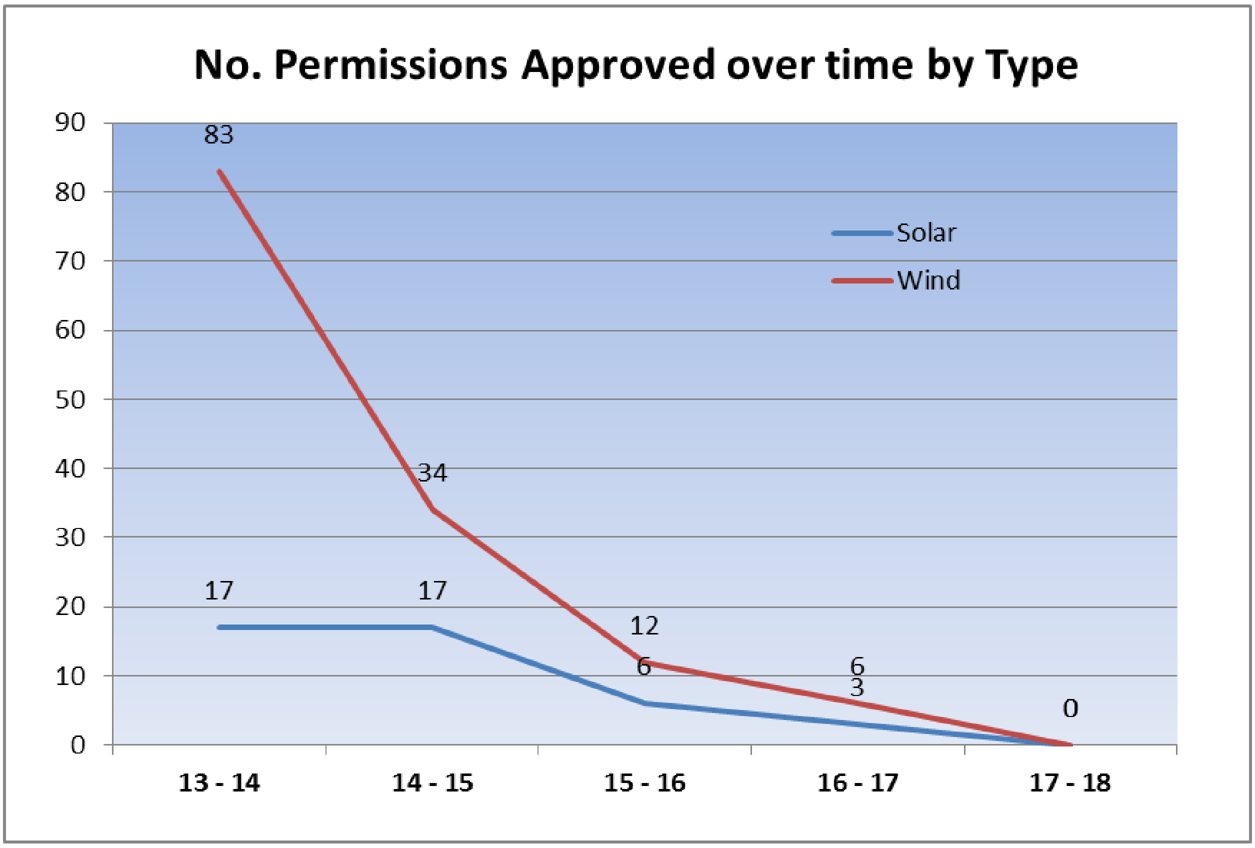


Whilst not the purpose of the indicator, it is also worth noting that there has been a notable drop in the number of applications for these renewable facilities.

From a 5 year peak in 13-14 (83 approvals), the number of permissions for solar farms decreased by more than half the following year (34 approvals), and has subsequently decreased by 50% each year. While not as dramatic, solar applications have followed a similar trend, from a peak of 17 approvals in both 2013-14 and 2014-15, to less than half that the following year (6 approvals) to half that figure again, with just 3 permissions approved in 2016-17. No permissions of this type were approved in 17-18.

Type	Year	Total Permissions	Heritage Coast	AONB
Solar	13 – 14	17	0	0
	14 – 15	17	0	0
	15 – 16	6	0	0
	16 – 17	3	0	0
	17 – 18	0	0	0
Wind	13 – 14	83	4	9
	14 - 15	34	0	0
	15 – 16	12	0	0
	16 – 17	6	0	0
	17 – 18	0	0	0

The below chart further illustrates the slowing of renewable approvals in the past five years.



24.1	**Number of listed buildings on the 'At Risk' Register** (Last updated: July 18)

Original Indicator and notes:

24.1	Protection and the enhancement of the historic environment	Number of listed buildings on the 'At Risk' Register	Decrease

Headlines:

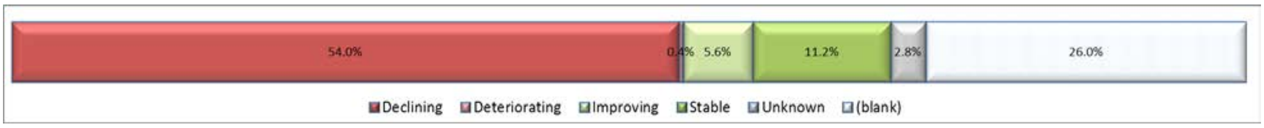
- **The total number of listed buildings on the At Risk Register has increased slightly this year after a small decrease the previous year (56 listed buildings in 2017, 53 in 2016, 54 in 2015).**
- **The total number of registrations on the At Risk Register in 2017 has also increased since a decrease last year. (249 in 2015, 242 in 2016, 250 in 2017)**

Source:

Historic England – Heritage At Risk: https://historicengland.org.uk/advice/heritage-at-risk/search-register/results/?advsearch=1&q=Cornwall&searchtype=harsearch#

'At Risk' Registrations – Breakdown of current conditions

Of the 250 registrations in 2017, over half are categorised as 'Declining, and this has increased from 51.7% in 2016 to 54% the following year. However, as illustrated below, over a quarter of registrations have no condition assigned or are listed as unknown.



Removing these registrations from the equation, 135 of the remaining 185 registrations (73%) are listed as declining in 2017.

Recent History of Listed Buildings on the Register

Although the number of listed buildings on the 'At Risk' register has only increased by one in 2017; this does not provide a true picture of change. Below outlines the sites that have been added or removed over the last two years.

The following buildings came off the 'At-Risk' Register in 2016:

Listed Building Grade II: Count House, Camborne (1142685) Listed Place of Worship Grade I: Church of St Brueredus, Churchtown St Breward (1158842), Church of St Enoder (1311865), Church of St Anietus, St. Neot (1329212) Listed Place of Worship Grade II: Camelford Methodist Church (1138307), Chapel of St Piran, Tintagel (1143411), Church of St Ida, St. Issey (1212700), Wesleyan Reform Union Chapel, St. Just (1386531)*

The following sites were added to the 'At Risk' register in 2016:

Listed Building Grade II: Cusgarne Manor farmhouse, Gwennap (1140913), Former Carharrack Methodist Church, Carharrack (1160248) Listed Place of Worship Grade I: Church of Saint Maugan, Mawgan-in-Meneage (1328596), Church of St Clement (1328900), Listed Place of Worship Grade II: Gunwen Methodist Church, Luxulyan (1158020), Listed Place of Worship Grade II*: Church of St Bartholomew, Warleggan (1140464), Church of St Martin, Lewannick (1277508)*

The following sites were added to the 'At Risk' register in 2017:

Listed Place of Worship Grade II, Methodist Church (Former Wesleyan Chapel)(1143291),Listed Place of Worship Grade I, Church of St Hydroc (1158013),Listed Place of Worship Grade I, Church of St Nivet (1158241),Listed Place of Worship Grade II*, Church of St Mary, St Blazey Gate (1212089),Listed Place of Worship Grade II*, Church of the English Martyrs and attached Walls and Steps, St Stephen's Hill (1297829),Listed Place of Worship Grade I, Church of Saint Buryan (1327526),Listed Building Grade II*, Remains of Carclew House (1160291),Listed Building Grade II*, Market House, Market Street (1289697),Listed Place of Worship Grade I, Church of Saint Gwendron (1328447)*

The following sites came off the 'At Risk' register in 2017:

Listed Place of Worship Grade I, Church of St Rumon, Ruanlanihorne (1141087), Listed Building Grade II, Weighbridge stores, assay office and brass machining shop at King Edward Mine, Troon, Camborne (1142686), Listed Building Grade II*, Rosecadgehill House, Penzance (1143171), Listed Building Grade II*, Boiler house to winding engine house at King Edward Mine, Troon, Camborne (1159235), Listed Place of Worship Grade II*, Church of St Hermes, St. Ervan (1212526), Listed Place of Worship Grade I, Church of St Petroc, Church Street, Padstow (1289931)*

25.2	**Open space managed to green flag status** (Last updated: July 2017)

Original Indicator and notes:

25.2	Green Infrastructure	Open space managed to green flag status	Maintain or improve accessibility to good quality open space

Headlines:

- **Four of Cornwall's most popular parks have been awarded the prestigious Green Flag Award for 2017 (100% of applications submitted)**.
- **The four parks which received the award this year are Victoria Park in Redruth, Morrab Gardens in Penzance and Queen Mary Gardens and Gyllyngdune Gardens in Falmouth.**

Current Picture:

The Green Flag Award – the mark of a quality park or green space – has been awarded to four parks across Cornwall marking them as officially among the very best green spaces in the country.

This national award, now in its third decade, was awarded to the parks on Wednesday 19 July and is a sign to the public that the space boasts the highest possible environmental standards, is beautifully maintained and has excellent visitor facilities. It's the first time that Victoria Park in Redruth has been recognised with a Green Flag.

Research by Cornwall Council shows 75% of residents can walk to a park or open space from their home; 66% of Cornish residents visit parks or open spaces at least once per week and 95% of Cornish residents believe having good quality public open spaces is very important.

26	**Number of applications approved contrary to the advice of EA on (i) flooding grounds (ii) water quality**

Original Indicator and notes:

26	Flood Risk Management and Coastal Change	Number of applications approved contrary to the advice of EA on (i) flooding grounds (ii) water quality	Zero

The Environment Agency produces an annual list of their objections to planning applications by Local Authority. We have crossed reference this list of objections against our list of planning applications for that year where a decision has been made.

Typically, applications are listed as being 'approved with conditions' and we can investigate whether those conditions include the mitigation of the flooding risk. If this is the case, the application is not judged to have been approved contrary to advice.

Headlines:

i) No. of applications approved contrary to EA advice on flooding grounds

Year of Objection	2015-16	2016-17	2017-18
No. approved contrary to advice	2	3	2

ii) No. of applications approved contrary to EA advice on water quality

Year of Objection	2015-16	2016-17	2017-18
No. approved contrary to advice	0	0	0

Context:

In **2015-16**, 2 permissions that were on the EA's annual objection list on flooding grounds where approved 'contrary to the advice of the EA' (PA14/11567, PA15/06648). The reasoning for these exceptions are outlined in the table below.

Ref No.	Location	Reason why approved contrary to EA advice
PA14/11567	St Austell (St Austell & Mevagissey CNA)	EA objection overruled on basis that safe access/egress was available at times of flooding
PA15/06648	Bugle (China Clay CNA)	EA objection overruled on the basis that the residential use of the site had existed for some time without any significant flood events and the improvements made in relation to both the watercourse and the layout of the site were likely to reduce the chance of flooding in the future.

In **2016-17**, 4 permissions that were on the EA's annual objection list on flooding grounds where approved 'contrary to the advice of the EA' (PA16/06114, PA16/06914, PA16/07945, PA16/06484). The reasoning for these exceptions are outlined in the table below.

Ref No.	Location	Reason why approved contrary to EA advice
PA16/06114	Penzance (West Penwith)	Concluded flood risk could be mitigated by condition which was imposed
PA16/06914	Truro (Truro & the Roseland CNA)	Concluded flood risk could be mitigated by condition which was imposed
PA16/07945	Fowey (St Blazey, Fowey & Lostwithiel CNA)	EA objected on basis of no flood risk assessment. A flood risk assessment was subsequently provided but EA objection not withdrawn
PA16/06484	Fowey (St Blazey, Fowey & Lostwithiel CNA)	Material considerations outweighed harm (flood risk) and LA emergency planners could accommodate additional occupants into their emergency evacuation plans

A further 2 permissions that were on the EA's annual objection list for 2015-16 do not appear to have been received by the LA. Although these have been approved, they cannot be judged approved 'contrary to advice' as it appears this advice had not been received. The LA has contacted the EA to make them aware of this.

In **2017-18**, 2 permissions that were on the EA's annual objection list on flooding grounds where approved 'contrary to the advice of the EA' (PA17/02422, PA17/03699). The reasoning for these exceptions are outlined in the table below.

Ref No.	Location	Reason why approved contrary to EA advice
PA17/02422		The proposal was for an annexe tied by condition to the host property which was not within the flood zone 2 or 3. Additionally, there was discussion as to what the building (which was existing) could be used for irrespective of whether planning permission was granted
PA17/03699		The habitable floor levels of the dwelling were shown as being above the relevant flood levels. Furthermore, a SUDS could deal with surface water run-off. Considering also the safe access and egress to and from the site during an extreme flooding event could be achieved, the development was considered to be appropriate in flood risk terms, even though the Sequential and Exception Tests were not undertaken.

Given the above, it appears then that this policy continues to be effective, as although there have been cases where applications have been approved contrary to advice these are in actually very few, and typically with reasoned arguments as to why this has happened.

27.1	**Percentage of people living within 30 minutes of an employment centre employing more than 500 people that use public transport or walk** (Last Updated: April 18)

Original Indicator and notes:

27.1	Transport and Accessibility	Percentage of people living within 30 minutes of an employment centre employing more than 500 people that use public transport or walk

Headlines:

- **In 2014 the percentage of people living within 30 minutes of an employment centre employing more than 500 people that use public transport or walk was 93%.**
- **In 2015, this dropped a percentage point, and has dropped 2 further percentage points in 2016 to 90% This drop comes from access to the larger employment centres with 5,000+ jobs**

Source:

Data for this indicator is sourced from the Department of Transport's '*Journey times to key services by local authority tables*' – Table JTS0401. https://www.gov.uk/government/statistical-data-sets/journey-times-to-key-services-by-local-authority-jts04 The Journey Time statistics publication will be updated for 2016 in April 2018.

Here, field **500EmpPT30pct** (% users within 30 minutes of employment centres with 500 to 4999 jobs available by PT/walk) and field **5000EmpPT30pct** (% users within 30 minutes of employment centres with at least 5000 jobs available by PT/walk) are combined to give the total percentage of people living within 30 minutes of an employment centre employing over 500 people.

Breakdown:

% of people living with 30 minutes of:	**2014**	**2015**	**2016**
Employment centres with 500-4999 jobs	85%	85%	83%
Employment centres with 5000+ jobs	8%	7%	7%
TOTAL: Employment centres with 500+ jobs:	**93%**	**92%**	**90%**

Note: In the Local Plan Monitoring Framework, a trend/target of 85% was quoted. It is likely that this was quoted in error – omitting those employers employing 5000+ people as per the breakdown above.

The above indicates that the percentage of people living with 30 minutes of an employment centre with 500+ jobs has dropped each year since 2014.

27.2	Access to services and facilities by public transport

Original Indicator and notes:

27.2	Transport and Accessibility	Access to services and facilities by public transport

As collecting data on access to 'services and facilities' is not well defined in the original indicator and would be difficult and resource intensive to properly assess, it is more practical for monitoring purposes to make the assumption that access to a town centre is commensurate to access to services and facilities.

Source:

As with the previous indicator, data is sourced from the Department of Transport's '*Journey times to key services by local authority tables*' – Table JTS0408. https://www.gov.uk/government/statistical-data-sets/journey-times-to-key-services-by-local-authority-jts04

The field **TownPT30pct** tells us the percentage of people in Cornwall within 30 minutes of town centres by public transport or walking.

Headlines:

- **2014 - % within 30 minutes of town centre by public transport :** 71%
- **2015 - % within 30 minutes of town centre by public transport :** 70%
- **2016 - % within 30 minutes of town centre by public transport :** 70%

The data suggests a minimal drop that is likely statistically insignificant. However, this needs to be monitored closely to ensure that developments in more rural areas are not leading to an increase in people not having the option of public transport.

As of the time of writing only 2016 data has been made available, as the schedule of the Department has been disrupted due to teething issues in the collation and aggregation of this data.

GLOSSARY

Planning (General):

Outline Application: The Application for an "Outline" Planning Permission is generally used to find out at an early stage whether or not a proposal is likely to be approved by the planning authority before any substantial costs are incurred. This type of planning application allows fewer details about the proposal to be submitted, and fewer details may be agreed following a "Reserved Matters" application at a later stage. Once outline planning permission has been granted, a 'Reserved Matters' application must be made within three years of the consent (or a lesser period if specified by a condition on the original outline approval.

Reserved Matters Application: See above. Generally treated in data summaries in the same way as Full applications

Full Planning Application: A "Full" planning permission is more detailed permission where all matters concerning the development will have been agreed. Generally, an approved full planning permission will be started within three years, as after three years the permission will expire. However, if a development begins on site the permission will never expire.

Community Network Area: There are 19 community networks, which are based around groupings of parishes and electoral divisions, for further information on these areas please visit the Community Network Areas page.

Neighbourhood Plans: Neighbourhood planning is a right for communities introduced through the Localism Act 2011. Communities can shape development in their areas through the production of Neighbourhood Development Plans, Neighbourhood Development Orders and Community Right to Build Orders. More information is available from the Royal Town Planning Institute.

5 year Housing Land Supply: Local planning authorities should: "identify and update annually a supply of specific deliverable site sufficient to provide five years worth of housing against their housing requirements". Therefore there is a requirement for the council to demonstrate that they have a 5 year supply of land to meet the needs for future housing development.

PBSA: Purpose Built Student Accommodation

HMO: House in Multiple Occupation

Eco-Community: Similar to an ecovillage, an eco-community can be defined as a "human-scale full-featured settlement in which human activities are harmlessly integrated into the natural world in a way that is supportive of healthy human development, and can be successfully continued into the indefinite future."

AONB: Area of Outstanding Natural Beauty

Heritage Coast: A landscape designation protected by Natural England.

Affordable Housing: Affordable housing is social rented, affordable rented and intermediate housing, provided to eligible households whose needs are not met by the market. Eligibility is determined with regard to local incomes and local house prices

Self/Custom Build Housing: Self or custom build housing refers to instances where individuals or groups are actively involved in creating their own home.

Gypsies and Travellers:

Gypsies and Travellers: Persons of nomadic habit of life whatever their race or origin, including such persons who on grounds only of their own or their family's or dependants' educational or health needs or old age have ceased to travel temporarily or permanently, but excluding members of an organised group of travelling showpeople or circus people travelling together as such.

Travelling Showpeople: Members of a group organised for the purposes of holding fairs, circuses or shows (whether or not travelling together as such). This includes such persons who on the grounds of their own or their family's or dependants' more localised pattern of trading, educational or health needs or old age have ceased to travel temporarily or permanently, but excludes Gypsies and Travellers as defined above.

Pitch: a pitch on a gypsy and traveller site, i.e. residential pitches for "gypsies and travellers". A pitch is generally assumed to accommodate at least 2 caravans and occasionally a day room.

Plot: a pitch on a Travelling Showpeople site (often called a yard), i.e. mixed-use plots which may/will need to incorporate space or to be split to allow for the storage of equipment.

Authorised Site: A site which has planning permission for use as a Gypsy and Traveller site.

Emergency Stopping Place: a licensed short-term Gypsy and Traveller site (or sometimes a 'tolerated' but unauthorised location) to which Gypsies and Travellers can be directed when in need. Fewer facilities are available than on transit sites and usually residents would only be able to remain at such a site for a few days.

Permanent / Residential Site: an authorised site intended for long-stay use by residents. No maximum length of stay is set unless planning permission is on a temporary basis.

Transit Site: an authorised site intended for short-term use by those in transit to other areas. The site is permanent but people who stay on it may only do so for a temporary period (normally for up to three months). Normally these sites have fewer facilities than permanent/residential sites.

Unauthorised Encampment: a piece of land where Gypsies and Travellers reside without planning permission. The land is not in the ownership of those involved in the encampment.

Employment Uses:

A1 Employment Uses: Convenience uses (Food and everyday necessities) – e.g. Bakers, Butchers, Grocers, Off-licences, Newsagents Supermarket, Confectionary and Tobacconists

A2 Employment Uses: Comparison Uses (Retail required occasionally) – e.g. Clothes, Books, Chemist, Optician, Gifts, Jewellery, Electronics, Carpets, Furniture, Phones, Florists, Pets and Garden Centres

A1,A3, A3,A4,A4 & SG Service (Professional services, Hot Food & drink establishments, Beauty): e.g. Banks, Estate Agents, Financial Advisors, Pubs, Restaurants, Takeaways, Hair & Beauty Salons, Travel Agents, Funeral Parlour, Dry Cleaning, and Betting Shops

Miscellaneous A1 & A2: Post Office, Employment Agency, Job Centres

B1 Business - Offices (other than those that fall within A2), research and development of products and processes, light industry appropriate in a residential area.

B2 General industrial - Use for industrial process other than one falling within class B1 (excluding incineration purposes, chemical treatment or landfill or hazardous waste).

B8 Storage or distribution - This class includes open air storage.

D1 Non-residential institutions - Clinics, health centres, crèches, day nurseries, day centres, schools, art galleries (other than for sale or hire), museums, libraries, halls, places of worship, church halls, law court. Non residential education and training centres.

D2 Assembly and leisure - Cinemas, music and concert halls, bingo and dance halls (but not night clubs), swimming baths, skating rinks, gymnasiums or area for indoor or outdoor sports and recreations (except for motor sports, or where firearms are used).

Vacant: Ground Floor Vacant Units

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