

**Cornwall Local
Development Framework**
Framweyth Omblegya
Teythyek Kernow



Planning Future Cornwall




Growth Factors: Hayle & St Ives Community Network Area Version 2

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Growth Factors – Hayle & St Ives Community Network Area

This 'Profile' brings together a range of key facts about the Hayle & St Ives Community Network Area that will act as an evidence base to help determine how much growth the area should accommodate over the next twenty years to maintain to enhance its viability and resilience. Each 'Profile' is split into three sections: Policy Objectives, Infrastructure & Environmental Considerations and Socio-Economic Considerations.

Summaries have been provided to indicate what the key facts might mean in terms of the need for growth – and symbols have been used as follows to give a quick overview:

		
Supports the case for future growth	No conclusion reached/ neutral factor/further evidence required	Suggests concern over future growth

Hayle & St Ives Overview: The Hayle & St. Ives Community Network Area contains 5 parishes and a range of settlements. Hayle and St. Ives (including Carbis Bay) are the main settlements within this area, and act as the local service centres to the smaller settlements surrounding them. Larger villages in the area include Connor Downs and St. Erth whereas smaller villages include Carnhell Green, Gwinear, Gwithian, Halsetown, Lelant, Nancledra, Reawla and Towednack.

This is a CNA encapsulating very diverse landscapes - the high moors of the west to the conservative, rich farmlands of the south-eastern part of the area. The Towans are part of the industrial, defence-related and settlement history of the whole area, related to Hayle as are the quays and causeways all round the estuary¹.

This area is one where the natural environment and built environments are interrelated, both in the estuary, across the Towans and around the Bay, where the views are landmarked by built structures such as Godrevy lighthouse, Church Towers, the Knill Monument, Trencrom or the town of St Ives. The coastline, despite the cliffs and extensive sandy beaches, is backed largely by urban expanse, industrial and quarrying remains, and recreational areas¹.

This is an area of high quality urban environments - especially in St Ives, with a legacy of historic buildings and structures and streetscapes lying below and up the surrounding slopes. Hayle retains its distinctive townscape (including unique ornamental landscapes around Foundry), and is recognised as internationally significant because of the relationship to the World Heritage Site. Lelant, Gwithian and St Erth are historic nucleated settlements of considerable importance, though characterised more by vernacular buildings than the larger towns. Even Carbis Bay, although less well defined, has a wealth of significant historic buildings, and a significant grain of gardens, lanes and streetscapes set amongst relict mining land and wooded cliff-land. There are significant historic ornamental landscapes associated with large houses and their wider estates to the west and south of Lelant and St Erth e.g. Trevethoe¹.

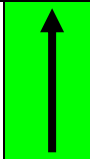
The following section outlines key facts about the Hayle & St Ives area, and provides the background information that has been used to produce the overall conclusions on what factors could promote or inhibit additional growth in the area.

¹ Cornwall Council (2011) Hayle & St Ives Historic Environment Data Sheet - <http://www.cornwall.gov.uk/default.aspx?page=32821>

Section 1: Policy Objectives: this section identifies how the Hayle & St Ives area can contribute towards achieving the key strategic ambitions for Cornwall as set out in Future Cornwall². In terms of the spatial strategy required to accomplish this, development is necessary to meet the needs of Cornwall's communities for homes, jobs and access to our daily needs in a way that can improve our health. The role of the Cornwall Local Plan: Strategic Policies³ document is to manage change and development pressures to enable and facilitate Cornwall's wider objectives.

Housing Need: Key Facts

- There were 13,281 dwellings in the Hayle & St Ives area in 2011⁴ and of these – 11,078 (83.4%) had at least one resident compared to the Cornwall average of 89%.
- The number of additional households⁵ created by population growth in the area could be around 2,300 in the next twenty years if trends up to 2008 continue as they have done. Many of these additional households will require new homes to be delivered.
- 672 people on the Home Choice Housing Register⁶ (waiting list) that are classed as in housing need (Bands A-D) have identified the Hayle & St Ives area as their preferred location (about 5.8% of the total). Another 954 people (Band E) have expressed a desire to live in this area and are also recorded in the Register.
- 95 affordable homes⁷ are required each year to meet need in the area – 0.79% of households compared to 0.65% of households across Cornwall

Growth Factor	The number of new households in the area is forecast to grow by over 2,000 over the next twenty years, and many of these household will require additional homes to be built. In addition there is a need for almost 1000 additional affordable homes to be provided over the next ten years to accommodate those already in housing need.	
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Housing Supply: Key Facts

- 13,281⁸ dwellings in 2011 – 5.1% of Cornwall's dwellings
- There has been a 22% increase in dwelling numbers⁹ (1991-2012 – average of 22.4% across Cornwall) equating to some 114 new dwellings per annum in the area.
- Work undertaken in the area proposes that Hayle town should grow by about 2,000 dwellings between 2010 and 2030 given existing constraints¹⁰ (although this was revised down to 1,300 at a recent Full Council¹¹ meeting). St Ives town should grow by about 800 dwellings between 2010 and 2030 given existing constraints (although this was revised down to 750 at a recent Full Council¹² meeting). Past development rates (about 42 and 87 new dwellings per annum respectively between 2001 and 2012) would suggest that the level of growth proposed can easily be accommodated.
- The surrounding rural area is proposed to accommodate around 400 dwellings in order to meet local needs housing and to support existing rural communities and facilities

² Future Cornwall (2010) Community Strategy - <http://www.futurecornwall.org.uk/Default.aspx?page=5>

³ Cornwall Council (2013) Cornwall Local Plan: Strategic Policies Proposed Submission Version - <http://www.cornwall.gov.uk/default.aspx?page=22887>

⁴ Office for National Statistics (2013) Census 2011 January 2013 release - <http://www.ons.gov.uk/ons/guide-method/census/2011/index.html>

⁵ Cornwall Council (2010) PopGroup population and household projections

⁶ Cornwall Council (2012) Home Choice Housing Register

⁷ Peter Smith Research & Consulting (2010) Cornwall Housing Market Strategic Evidence Base 2010 Update - <http://www.cornwall.gov.uk/default.aspx?page=17559>

⁸ Office for National Statistics (2013) Census 2011 January 2013 release - <http://www.ons.gov.uk/ons/guide-method/census/2011/index.html>

⁹ Cornwall Council (2012) Housing Land Availability

¹⁰ Cornwall Council (2012) Hayle Draft Town Framework and the St Ives/Carbis Bay Draft Town Framework - <http://www.cornwall.gov.uk/default.aspx?page=32821>

¹¹ Cornwall Council (2013) Meeting 12th February 2013 - <https://democracy.cornwall.gov.uk/ieListDocuments.aspx?CId=584&MId=4724&Ver=4>

¹² Cornwall Council (2013) Meeting 12th February 2013 - <https://democracy.cornwall.gov.uk/ieListDocuments.aspx?CId=584&MId=4724&Ver=4>

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(although this was revised down to 350 at a recent Full Council¹³ meeting). Information is available on land availability in the smaller settlements in the area and this would suggest that there is potentially enough identified sites to accommodate the proposed growth. Past development rates (about 16 new dwellings per annum between 2001 and 2012) would suggest that the level of growth proposed can be accommodated.

- As at 31st March 2010 there were 222 dwellings under construction and 1,271 unimplemented planning permissions¹⁴. 251 dwellings have been completed between 2010 and 2012. If a figure of 3,200 dwellings for the area is chosen, over half (55%) of this figure is already accounted for. If a figure of 2,400 dwellings for the area is chosen, almost three-quarters of this figure is already accounted for.
- About 1.2% of dwellings were registered as empty properties¹⁵ - Cornwall average 1.6% (2012) and 11.5% of properties were registered as second homes⁶ – Cornwall average 5.4%. These figures indicate that a lower proportion than on average of dwellings in the area are vacant and that there is a great deal of competition between permanent and temporary residents.
- 29% of dwellings paying Council Tax in 2012 were occupied by one person in the Hayle & St Ives area compared to the Cornwall average of 30.7%.
- Average household size in the area was estimated to be 2.23 in 2011¹⁶ compared to a Cornwall average of 2.27 indicating that there are fewer people per house than on average across Cornwall.

Growth Factor	The rate of new dwellings constructed in this area in recent times is at a slightly higher level than the average across Cornwall, and this trend will need to continue and increase in some areas to accommodate the additional population the area is predicted to grow by.	↑
	Land to accommodate up to 3,000 homes has been identified in and around Hayle town, and land to accommodate up to 1,500 homes has been identified in and around St Ives & Carbis Bay town indicating capacity for growth.	↑
	An amount of housing land will be required in smaller settlements in the area (up to 400 dwellings) and potential land identified and past development rates suggest this could be accommodated.	↑
	More than half (and up to three-quarters) of the dwellings required has already been accounted for through existing completions and planning permissions depending on the growth figure chosen.	↑
	There is a great deal of competition between permanent and temporary residents for accommodation in the area, and the growth figure chosen will need to accommodate this level of competition to ensure local residents can access suitable housing.	↑

Economy and Regeneration: Key Facts

- The area falls within the Penzance Travel to Work Area (TTWA) and as a result both St Ives and Hayle are in competition with Penzance in terms of attracting employment.
- The Hayle & St Ives area produces just over 4%¹⁷ of Cornwall's Gross Value Added figures.
- Hayle functions as a smaller local centre for retail and other services, with a large proportion of residents out-commuting. The town's future growth could be enhanced by the development of the Wave Hub renewable power project and marine renewables business park as well as the wider regeneration of Hayle harbour.

¹³ Cornwall Council (2013) Meeting 12th February 2013 -

<https://democracy.cornwall.gov.uk/ieListDocuments.aspx?CId=584&MId=4724&Ver=4>

¹⁴ Cornwall Council (2011) Housing Land Availability

¹⁵ Cornwall Council (2012) Council Tax

¹⁶ Office for National Statistics (2013) Census 2011 January 2013 release - <http://www.ons.gov.uk/ons/guide-method/census/2011/index.html>

¹⁷ Cornwall Council (2011) Economic Development Intelligence Report (estimates)

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- Hayle town and industrial estates are situated on the A30 and as a result have very good transport links within and out of Cornwall. St Ives & Carbis Bay has access onto the A30 via the A3074.
- The main industrial estates in the area are Guildford Road (5 ha) and Lambo St Erth (5 ha).
- Most undeveloped employment land within the Penzance TTWA¹⁸ is located to the south-west of Hayle to the south of the A30 roundabout. In the medium and longer term, the employment allocations at the St Erth Industrial Estate (7.7 ha) are expected to be available for development, and if delivered would consolidate the cluster of industrial accommodation in this location. There are a limited number of sites capable of providing accommodation for small-scale workshop/office accommodation within this TTWA, and in the short term this includes Consols Industrial Estate at St Ives.
- St Ives is an important centre for tourism, cultural and creative industries, for which the development of Tate St Ives has been an important driver. The town is constrained by its topography and access, with traffic congestion a particularly significant problem, although this may be alleviated somewhat by the planned park and ride facility at St Erth.
- A scheme is proposed to renovate Porthmeor Studios in St Ives safeguarding the workspace¹⁹.
- There is an aspiration to develop a work hub in the area.
- Around 2,900 jobs could be stimulated in the Hayle & St Ives area over the next twenty years, comprising 400 office based jobs, 500 industrial based jobs and 2,000 jobs in the retail, leisure, education, healthcare and financial services sectors.
- This could potentially require an additional 9 hectares of employment land – approximately 7 hectares of undeveloped employment land is available in Hayle town.
- In 2011²⁰, 24.7% of those aged 16 plus in the Hayle & St Ives area had no qualification compared to the Cornwall average of 22.4%. Of the remainder, 23.8% had level 4 and above qualifications in the area compared to 25% on average across Cornwall.

Growth Factor	The Hayle & St Ives area appears to be producing just over 4% of Cornwall's GVA from about 4.8% of Cornwall's population, indicating that it is a reasonable location for improving Cornwall's overall economic output.	↑
	The area could accommodate almost 3,000 new jobs over the next twenty years, and may require an additional 2 hectares of employment land. To ensure this desire for additional employment is sustainable, new homes will need to be provided in close proximity.	↑
	Local skills levels are generally higher in this area than in some other areas of Cornwall.	↑

Community Aspirations²¹: Key Facts

- Support new employment schemes both in the towns and in the rural areas. Emphasis should be given to quality, permanent work opportunities which break the cycle of seasonal labour. High speed broadband should be encouraged in all areas to meet modern working requirements.
- To deliver a mix of housing, of the size, type and tenure of housing required to meet current and future housing needs, including affordable and specialist accommodation.
- Encourage investment in health care & GP coverage, education (including further education opportunities) and open space provision and protect current levels of provision.

¹⁸ Nathaniel Lichfield & Partners (2010) Cornwall Employment Land Review -

<http://www.cornwall.gov.uk/default.aspx?page=26986>

¹⁹ Cornwall Council (2012) Draft Infrastructure Needs Assessment Schedules -

<http://www.futurecornwall.org.uk/default.aspx?page=354>

²⁰ Office for National Statistics (2013) Census 2011 January 2013 release - <http://www.ons.gov.uk/ons/guide-method/census/2011/index.html>

²¹ Cornwall Council (2012) Hayle & St Ives Place Based Paper - <http://www.cornwall.gov.uk/default.aspx?page=32821>

Growth Factors – Hayle & St Ives Community Network Area

- Ensure development is sensitive to the outstanding natural, built and historic environment of the area, giving careful consideration to the location, scale and design of all new development.

Hayle Town Framework²² Objectives are:

- To deliver the regeneration of Hayle including Hayle Harbour.
- To deliver new employment space and opportunities in appropriate locations including support for the wave hub facility and related business and employment opportunities.
- A planned expansion to the future growth of the town in order to match appropriate infrastructure requirements to any proposed growth.
- To deliver a cohesive movement and transport network, including better links between the town and the beach and surrounding area.
- To encourage effective management and enhancement of the natural and built environment that incorporates Conservation Areas and the World Heritage Site designation.
- To provide new high quality retail development within the town, to complement the existing centres.

St Ives & Carbis Bay Town Framework²³ Objectives are:

- To assist in resolving access/movement issues through the area, including promoting sustainable transport.
- To support and enhance the local economy and businesses – by maintaining and enhancing the quality of offer including attractions and businesses related to the arts, tourism and retail.
- A planned expansion to the future growth of St Ives & Carbis Bay in order to match appropriate infrastructure requirements to any proposed growth.
- To develop green infrastructure links along the coast and into the Town.

Growth Factor	Growth is required to enable the delivery of local needs and affordable housing, and as grant support reduces there will be a greater reliance on affordable homes being cross subsidised as part of larger open market developments. The number of affordable homes that can be provided will be related to the number of total homes developed. High growth levels will enable the delivery of high numbers of affordable homes.	↑
	Planning for employment is required alongside the development of new housing and growth should encourage and promote employment opportunities related to the marine renewable sector.	↑
	Growth could exacerbate congestion in the two towns unless measures are put in place to help alleviate the issues. New development in the area could support the development of alternative measures, including the proposed development of a park & ride facility at St Erth.	↓
	Growth can impact on the natural, built and historic landscapes in the area and it needs to be carefully managed to ensure its impact is kept to a minimum and appropriate mitigation measures required are enforced.	—

Section 2: Infrastructure and Environmental Considerations: this section aims to demonstrate the ability of the area to cope with additional development, and to identify where there are specific constraints that will need to be carefully managed or mitigated against.

Infrastructure²⁴: Key Facts

- Education – in terms of primary education in Hayle town, options are being considered to increase capacity in the short term by increasing capacity at Penpol Primary School

²² Cornwall Council (2012) Hayle Town Framework - <http://www.cornwall.gov.uk/default.aspx?page=32821>

²³ Cornwall Council (2011) St Ives & Carbis Bay Town Framework - <http://www.cornwall.gov.uk/default.aspx?page=32821>

²⁴ Cornwall Council (2012) Draft Infrastructure Needs Assessment Schedules - <http://www.futurecornwall.org.uk/default.aspx?page=354>

and the development of a new school. The secondary school in Hayle should be able to accommodate additional pupils generated by large-scale housing growth within existing provision in the short-term. A review of capacity in Hayle for the longer term will be undertaken once growth proposals for the area are identified. In terms of St Ives & Carbis Bay town, in the short term there is capacity within both the primary and secondary schools to accommodate some development. A review of capacity for the longer term will be undertaken once growth proposals for the area are identified.

Primary schools in the rural area are close to capacity in some settlements (e.g. Connor Downs) and have a significant amount of capacity in other settlements (e.g. St Erth).

- More work needs to be done to assess the capacity of existing utilities (i.e. water, sewage, electricity, gas) to meet proposed growth. The area lies to the west of Indian Queens and there is a need already identified to upgrade the electricity supply from Indian Queens to Mid and West Cornwall.
- Both Hayle and St Ives & Carbis Bay towns have a good range of spaces available to residents including allotments, sports pitches, children's equipped play areas, informal green space and indoor sports facilities. Many of the settlements in the rural area include some small equipped play areas, informal green space and sports pitches. Work²⁵ has been undertaken to assess the capacity of existing sports, green and open space, and the requirement for additional space to meet the levels of growth proposed, and this amounts to a need for up to an additional 14.4 hectares in hayle.
- Healthcare – residents can access their main healthcare providers in Hayle (doctors, dentists, opticians, chemists and St Michael's Hospital) and in St Ives & Carbis Bay town (doctor, dentist, chemist and the Edward Hain Hospital) and there is a doctors' surgery in Connor Downs. It is estimated that up to four additional doctors may be required in the Hayle & St Ives area depending on the level of growth proposed.
- Leisure Facilities – Cornwall Council is proposing to withdraw funding for Hayle Outdoor Pool which could have local consequences.
- Emergency Services - there is a proposal for an emergency response hub in Hayle which will see fire, police and ambulance services sharing the same facility.
- Community Facilities – there is a requirement to replace St Ives Youth Centre as it is no longer fit for purpose.
- Crematoria and Cemeteries – crematoria capacity is sufficient to meet demand over the next twenty years whichever level of growth is proposed²⁶. There is concern locally about the capacity of burial space at Carbis Bay and work is being undertaken to assess need²⁷.

Growth Factor	Hayle and St Ives & Carbis Bay town residents have access to a wide range of infrastructure, and growth will help maintain or enhance these services and facilities.	↑
	Rural residents in the area have access to some infrastructure and additional growth may help maintain these services and facilities. Rural residents will always need to travel to Hayle & St Ives or other urban areas to access key services and facilities.	—
	New development in the area will require additional infrastructure to be delivered, particularly in terms of healthcare improvements.	—

Transport Links & Accessibility: Key Facts

- Hayle town is on the strategic road network (A30) and has relatively good access within and out of Cornwall. Other settlements in the area generally have good access to this network, although congestion is an issue in the area particularly in the summer months.
- Traffic congestion is an issue in the Hayle & St Ives area, and the development of a park & ride facility at St Erth²⁸ is proposed to alleviate some of this. Other schemes

²⁵ Cornwall Council (2012) Town Framework Plans - <http://www.cornwall.gov.uk/default.aspx?page=32821>

²⁶ Cornwall Council (2012) Town Framework Plans - <http://www.cornwall.gov.uk/default.aspx?page=32821>

²⁷ Cornwall Council (2011) Cemeteries and Crematoria Service

²⁸ Cornwall Council (2011) Local Investment Plan - <http://www.cornwall.gov.uk/default.aspx?page=27639>

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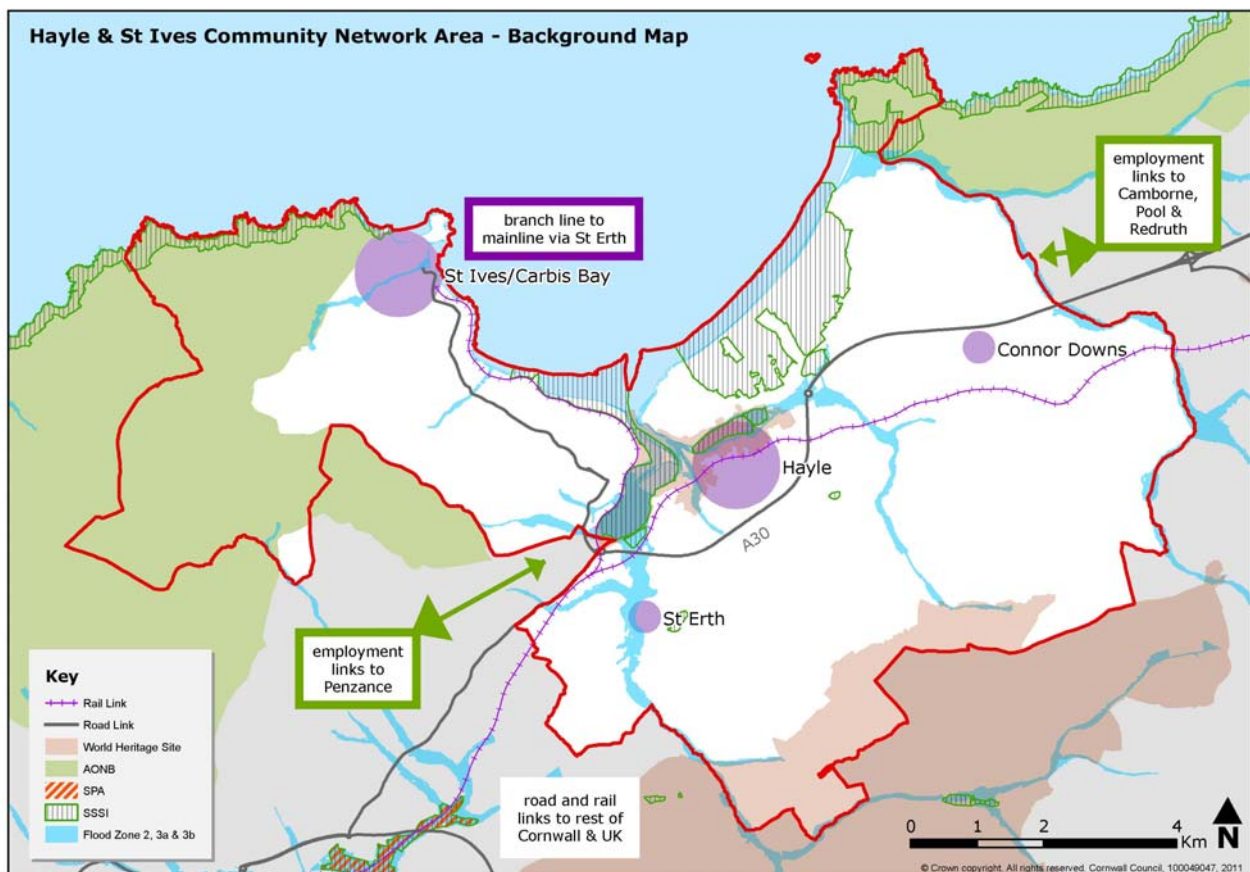
proposed include junction improvements at Loggans Moor on the A30. Improvements are required in terms of cycling and pedestrian routes in the Hayle & St Ives area.

- Mainline rail services are available at Hayle and St Erth, and a branch line runs to Lelant, Carbis Bay and St Ives town.
- Both Hayle and St Ives & Carbis Bay towns have good travel to work bus service²⁹ to key centres as do the main settlements in the rural area.

Growth Factor	Hayle is located on the A30 in Cornwall and growth will enhance the Town's position as a key employment centre in the West of Cornwall. Congestion is an issue in the area particularly in the summer months – significant growth in the area may help support funding towards the development of the proposed park & ride scheme.	↑
	Good public transport links are available between Hayle and St Ives & Carbis Bay towns and settlements in the rural areas and to other key urban settlements in the west of Cornwall. An appropriate level of growth will help maintain and enhance the current level of service, and may help reduce the amount of subsidy required to currently run these services.	↑

Environment: Key Facts

- A large part of the area around St Ives is designated as Areas of Outstanding Natural Beauty as is a small area in the north west of the area. Part of Cornwall's World Heritage Site falls within the Hayle & St Ives area³⁰.
- Important landscape designations in the area are identified on the map below:



- The Hayle & St Ives area is divided into six landscape type areas³¹.

²⁹ Cornwall Council (2011) Passenger Transport - <http://www.cornwall.gov.uk/default.aspx?page=4476>

³⁰ Cornwall Council (2011) Geographic Information System

³¹ Cornwall Council (2007) Cornwall & Isles of Scilly Landscape Character Study - <http://www.cornwall.gov.uk/default.aspx?page=24874>

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- Flood Risk & Mitigation – work needs to be undertaken to understand these issues in the Hayle & St Ives area. Proposed are schemes at Hayle River, sea wall schemes at Pednolva Walk and Wharf Road in St Ives, a SUDS scheme in a St Ives car park and Stennack Stream³².
- Historic Environment – major heritage at risk has been identified as Loggans Mill and Hayle Harbour. Schemes are proposed at Hayle Foundry (phase 3)³³.

Growth Factor	Significant parts of the area fall within nationally recognised landscape and historic character designations. New development has to be carefully planned to minimise its impact.	—
	Flooding is a concern in some areas and mitigation works may be required in or as a result of new developments.	—

Section 3: Socio-Economic Considerations: this section aims to identify what socio-economic factors in the area exist that would indicate either a need for growth to meet future needs or which suggest a limited level of growth is required.

Population: Key Facts³⁴

- Population of 25,373 (2011)³⁵ – 4.8% of Cornwall's population
- The population growth rate between 2001 and 2011 is lower (4%) than the Cornwall average (6.6%)
- Population by age³⁶ in the Hayle & St Ives area comprises 14.5% aged 0-15; 61.2% aged 16-64 and 24% aged 65 plus compared to 15.2%, 62.8% and 22.1% respectively across Cornwall.
- Based on trends experienced up to 2008 the population could increase by around 2,800³⁷ (11%) between 2010 and 2030.
- The area has a current dependency ratio of 70.0 which is just lower than the Cornwall average of 72.2. This means that there are fewer people in the younger and older age groups that are dependent on the working age group.
- The Hayle & St Ives area accounts for about 2.4% of Cornwall by area (8,619 hectares).
- Population density of 2.99 persons per hectare compared to the Cornwall average of 1.5 persons per hectare.

Growth Factors	The population of the area could grow by around 2,800 over the next twenty years if current trends continue, and a number of new homes will need to be provided to accommodate this increase in population.	↑
	The area has experienced lower levels of growth than on average indicating that it is likely to be an area that may need to increase its current level of development to meet future demand for housing.	↑
	This is a small, quite densely populated area in relation to the Cornwall average, and any additional population will be spread across the area - Hayle and St Ives & Carbis Bay towns stand out as being able to accommodate significant levels of growth.	↑
	There is estimated to be good balance in the population between the proportion of working age people and the more dependent younger and older age groups. Census 2011 data suggests that there is a larger proportion of people in the older age groups	—

³² Cornwall Council (2012) Draft Infrastructure Needs Assessment Schedules - <http://www.futurecornwall.org.uk/default.aspx?page=354>

³³ Cornwall Council (2011) Hayle & St Ives Historic Environment Data Sheet - <http://www.cornwall.gov.uk/default.aspx?page=32821>

³⁴ Cornwall Council (2010) Population Profile - <http://www.cornwall.gov.uk/default.aspx?page=20177#PopulationProfiles>

³⁵ Office for National Statistics (2013) Census 2011 January 2013 release - <http://www.ons.gov.uk/ons/guide-method/census/2011/index.html>

³⁶ Office for National Statistics (2013) Census 2011 January 2013 release - <http://www.ons.gov.uk/ons/guide-method/census/2011/index.html>

³⁷ Cornwall Council (2010) PopGroup population and household projections

Employment and Jobs: Key Facts

- The main employment sectors in Hayle town in 2011 were wholesale & retail trades/repair of motor vehicles and human health & social work activities³⁸ which reflects the pattern in 2001.
- The main employment sectors in St Ives town in 2011 were accommodation & food service activities, wholesale & retail trades/repair of motor vehicles and human health & social work activities which reflect the pattern in 2001.
- The main employment sectors outside of Hayle and St Ives towns in 2011 were wholesale & retail trades/repair of motor vehicles, accommodation & food service activities and human health & social work activities.
- In terms of employed people, the key sectors in the area are the wholesale & retail trades/repair of motor vehicles, accommodation and food service activities, professional, scientific and research activities and the human health & social work activities³⁹.
- Social care is a sector that is predicted to grow by 25% to meet the needs of an increasing number of older age people⁴⁰.
- 64.4% of those in employment⁴¹ in the Hayle & St Ives area worked full time (31 hours per week plus) and 35.6% were part time (less than 31 hours) compared to the Cornwall average of 66.1% and 33.9% respectively.
- In 2011⁴², 24.7% of those aged 16 plus in the Hayle & St Ives area had no qualification compared to the Cornwall average of 22.4%. Of the remainder, 23.8% had level 4 and above qualifications in the area compared to 25% on average across Cornwall.
- The Job Seekers Allowance⁴³ claimant rate for the area has increased from 2.9% of the working age population in January 2007 to 3.9% in January 2012 (low season – Cornwall average 2% and 3.3% respectively). The rate changed from 1.5% in July 2007 to 2.6% in July 2012 (high season – Cornwall 1.3% and 2.6% respectively). The current rate (December 2012) stands at 3.4% of the working age population in Bodmin compared to 3% on average across Cornwall.
- In 2011⁴⁴ 40.1% of households in the Hayle & St Ives area contained no-one in employment and of these households 7.9% had dependent children compared to the Cornwall averages of 37.8% and 8.3% respectively.
- In 2011⁴⁵ 29.6% of households in the area contained at least one person with a long term health problem or disability, and of these households 15% contained dependent children compared to the Cornwall averages of 28.8% and 15.6% respectively.

Growth Factor	There is a good range of employment sectors in the area although many of them tend to be low paid and can be seasonal.	↑
	The proportion of people claiming Job Seekers Allowance in the Hayle & St Ives area is generally slightly higher than on average across Cornwall.	—
	Local skills levels are less of an issue in this area compared to other areas across Cornwall.	↑

³⁸ Office for National Statistics (2013) Census 2011 January 2013 release - <http://www.ons.gov.uk/ons/guide-method/census/2011/index.html>

³⁹ NOMIS (2012) Business Register and Employment Service - <http://www.nomisweb.co.uk/>

⁴⁰ Cornwall Council (2011) Economic Development – Sector analysis

⁴¹ Office for National Statistics (2013) Census 2011 January 2013 release - <http://www.ons.gov.uk/ons/guide-method/census/2011/index.html>

⁴² Office for National Statistics (2013) Census 2011 January 2013 release - <http://www.ons.gov.uk/ons/guide-method/census/2011/index.html>

⁴³ NOMIS (2012) Claimant Count data - <http://www.nomisweb.co.uk/>

⁴⁴ Office for National Statistics (2013) Census 2011 January 2013 release - <http://www.ons.gov.uk/ons/guide-method/census/2011/index.html>

⁴⁵ Office for National Statistics (2013) Census 2011 January 2013 release - <http://www.ons.gov.uk/ons/guide-method/census/2011/index.html>

Viable Places - Settlement Functionality⁴⁶: Key Facts

- Main settlements are Hayle and St Ives & Carbis Bay – both categorised as Category B settlement which are classified as market and coastal towns that are locally significant and contain a good range of housing, employment, and community facilities and services.
- Category D settlements are smaller settlements that perform an important role in their local areas, i.e. 'rural service centres' – Connor Downs and St Erth.
- Category E settlements are those that include either a primary school or a general store – Gwinear and Nancledra.
- Other settlements do contain some key facilities such as a travel to work bus service and a meeting place – Carnhell Green/Wall /Realwa, Lelant and Rosudgeon.
- Work is underway to understand how some villages could work together to provide services and facilities to local residents - a 'cluster' – and in this area there are some potential clusters already identified – St Ives with Carbis Bay and Lelant and Hayle with Phillack.

Growth Factor	There is a good mix of settlements in the area and an appropriate level of growth can help maintain and enhance the viability and resilience of existing communities.	↑
	St Ives and Hayle towns are the main urban centres in the area and have a good range of services and facilities available to meet the needs of the current and future populations and can accommodate a significant proportion of the growth allocated to the area.	↑
	There is the potential to ensure better access to services and facilities through the identification of 'clusters' – and St Ives with Carbis Bay & Lelant and Hayle with Phillack are identified as potential clusters.	↑

Retail^{47 48}: Key Facts

- Almost 20% of residents in the area do their main food shopping in Hayle town – Camborne Pool Illogan & Redruth and Penzance are the shopping centres of choice for the majority of Hayle residents. The Co-op, Lidl and Marks & Spencer are the main stores in the town.
- 55% of residents in the area do their main food shopping in St Ives & Carbis Bay town – Penzance is where a small proportion carry out their main food shopping. The Co-op and Tesco are the main stores in the town.
- Hayle & St Ives town contains a small number of multiple retailers, the majority being independent retailers.
- Small but increasing number of vacant premises in St Ives town centre, and a small number of vacancies in Hayle town.
- There were no retailer requirements recorded for St Ives town in October 2010 (although there were 7 the year before), and there is interest in Hayle for food retail stores.
- Truro and Penzance are the shopping centres that the vast majority of people in this area use for clothes and other personal goods.
- Camborne Pool Illogan & Redruth, Penzance and Truro are the shopping centres chosen for DIY and other household goods in this area.
- Almost 50% of residents in the St Ives area considered St Ives town to be their main shopping centre and another 30% considered it to be Penzance. 43% liked St Ives town because it was near and/or convenient – 42% did not dislike anything about the centre although 30% didn't like the selection of shops available.
- 31% of residents in the Hayle area considered Hayle town to be their main shopping centre and 39% considered it to be Penzance. 45% liked Hayle town because it was

⁴⁶ Cornwall Council (2012) Settlements: Hierarchy and Settlement Categories 2012 Update - <http://www.cornwall.gov.uk/default.aspx?page=22887>

⁴⁷ Cornwall Council/GVA Grimley (2009) Cornwall Household Retail Telephone Survey

⁴⁸ GVA Grimley (2010) Cornwall Retail Study - <http://www.cornwall.gov.uk/default.aspx?page=26564>

Growth Factors – Hayle & St Ives Community Network Area

near and/or convenient – 53% did not dislike anything about the centre although 19% didn't like the selection of shops available.

- The Cornwall Retail Study concludes that St Ives is a very healthy centre, which has increased its financial performance and attractiveness through an increasing appeal to the tourism industry.
- Both Hayle and St Ives towns are very accessible by private car (A30) although traffic through the town centres can be an issue, particularly in St Ives. The main bus terminus is close to both the town centres, and the railway stations are also close by.
- A large number of villages⁴⁹ in the area include retail outlets such as general stores and post offices – these can provide many of the services residents require on a daily basis.

Growth Factor	The majority of residents in the area consider Hayle & St Ives town to be their main shopping centre for a range of goods, and growth will help maintain and enhance the quantity and quality of the retail offer in the Town.	↑
	Hayle & St Ives town is performing relatively well, although the town centre is constrained in terms of topography, congestion and regeneration opportunities. Additional development could increase the pressure on the town centre unless mitigation works are put in place.	↑
	Some daily retail needs of residents can currently be met locally in a number of smaller settlements in the area, and an appropriate level of growth can help maintain these facilities.	↑

Deprivation:

- Census 2011⁵⁰ has identified that 37.6% of households in the Hayle & St Ives area do not experience any form of deprivation compared to 40.2% on average across Cornwall. Of the remainder, 35.5% are deprived in one dimension, 20.9% in two dimensions, 5.5% in three dimensions and 0.6% in all four dimensions compared to 34.6%, 19.9%, 4.8% and 0.5% respectively across Cornwall.
- The English Indices of Deprivation⁵¹ combines a number of indicators, chosen to cover a range of economic, social and housing issues, into a single deprivation score for each small area in England. This allows each area to be ranked relative to one another according to their level of deprivation. These Indices have been produced at a Lower Super Output Area level, of which there are 32,482 in England.
- In terms of the overall Index of Multiple Deprivation, 1 area in Hayle town appears in the most deprived quintile across England.
- In terms of income deprivation, 1 area in Hayle town and 1 area in St Ives town appear in the most deprived quintile across England.
- In terms of employment deprivation (conceptualised as involuntary exclusion of the working age population from the world of work), 1 area in Hayle town and 1 area in St Ives town appear in the most deprived quintile across England.
- In terms of education, skills and training deprivation, relating to a lack of attainment among children and young people, and a lack of qualifications in terms of skills, 1 area in Hayle town and 1 area in St Ives town appear in the most deprived quintile across England.

⁴⁹ Cornwall Council (2012) Settlement Profiles - <http://www.cornwall.gov.uk/default.aspx?page=32821>

⁵⁰ Office for National Statistics (2013) Census 2011 January 2013 release - <http://www.ons.gov.uk/ons/guide-method/census/2011/index.html> The dimensions of deprivation used to classify households are indicators based on the four selected household characteristics: Employment (any member of a household not a full-time student is either unemployed or long-term sick); Education (no person in the household has at least level 2 education, and no person aged 16-18 is a full-time student); Health and disability (any person in the household has general health 'bad or very bad' or has a long term health problem), and Housing (Household's accommodation is either overcrowded, with an occupancy rating -1 or less, or is in a shared dwelling, or has no central heating). A household is classified as being deprived in none, or one to four of these dimensions in any combination.

⁵¹ DCLG (2011) The English Indices of Deprivation 2010 - <https://www.gov.uk/government/publications/english-indices-of-deprivation-2010>

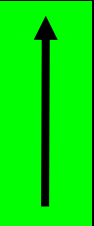
Growth Factors – Hayle & St Ives Community Network Area

Growth Factor	The Hayle & St Ives area generally experiences higher levels of deprivation than on average across Cornwall.	—
	There are areas in Hayle and St Ives towns that appear in the most deprived quintile in terms of deprivation.	—
	Growth and regeneration can improve levels of deprivation by giving people the training to find higher skilled and better paid jobs by enhancing training and employment opportunities in an area.	↑

Summary:

Policy Objectives		
Housing Need and Supply	The number of new households in the area is forecast to grow by over 2,000 over the next twenty years if current trends continue, and many of these households will require additional homes to be built. In addition there is a need for almost 1000 additional affordable homes to be provided over the next ten years to accommodate those already in housing need. There is a great deal of competition from second home owners in this area and the number of new houses developed will need to accommodate this aspect of need.	↑
Economy & Regeneration	The Hayle & St Ives area appears to be producing just over 4% of Cornwall's GVA from about 4.8% of Cornwall's population, indicating that it is a reasonable location for improving Cornwall's overall economic output. The area could accommodate almost 3,000 new jobs over the next twenty years.	↑
Community Aspirations	This area has aspirations to grow both in terms of housing and employment whilst respecting the natural and historic character of the area.	↑
Infrastructure and Environmental Considerations		
Infrastructure	Hayle and St Ives & Carbis Bay town residents have access to a wide range of infrastructure, and growth will help maintain or enhance these services and facilities. Rural residents in the area have access to some infrastructure and additional growth may help maintain these services and facilities. Rural residents will always need to travel to Hayle & St Ives or other urban areas to access key services and facilities.	↑
Transport Links & Accessibility	Hayle is located on the A30 in Cornwall and growth will enhance the Town's position as a key employment centre in the West of Cornwall. Congestion is an issue in the area particularly in the summer months	—
Environmental Considerations	Significant parts of the area fall within nationally recognised landscape and historic character designations. New development has to be carefully planned to minimise its impact.	—
Socio-Economic Considerations		
Population	The population of the area could grow by around 2,800 over the next twenty years if current trends continue, and a number of new homes will need to be provided to accommodate this increase in population. There is a good balance in the population between the proportion of working age people and the more dependent younger and older age groups.	↑
Employment & Jobs	There is a good range of employment sectors in the area although many of them tend to be low paid and can be seasonal.	↑
Viable Places – Settlement Functionality	An appropriate level of growth can help maintain and enhance the viability and resilience of existing communities. Hayle and St Ives & Carbis Bay towns are the main urban centres in the area and they have a good range of services and facilities available to meet the needs of the current and future populations.	↑
Retail	The majority of residents in the area consider Hayle & St Ives town to be their main shopping centre for a range of goods, and growth will help maintain and enhance the quantity and quality of the retail offer in the town.	↑

Growth Factors – Hayle & St Ives Community Network Area

Deprivation	There are areas in Hayle and St Ives towns that appear in the most deprived quintile in England in terms of deprivation. Growth and regeneration can reduce deprivation by giving people the training to find higher skilled and better paid jobs by enhancing training and employment opportunities in an area. The proposed regeneration initiatives and development could provide residents with the training and employment opportunities required to raise deprivation levels in the area.	
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