Report

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Strategic Housing Market Needs Assessment (SHMNA)
Appendix 2 – Cornwall SHMNA Overview Report
July 2013

Contents

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For and on behalf of GVA Grimley Ltd

Executive Summary

This Executive Summary is intended to be read in conjunction with the remainder of this Cornwall Overview Report and the Strategic Housing Market Needs Assessment (SHMNA) Main Report.

This evidence base has been developed to support the development of the Cornwall Local Plan (previously known as the Core Strategy), which has been subject to two rounds of consultation since 2011.

In presenting the findings, the Executive Summary is structured around four separate themes which reflect the requirements of the NPPF and are intended to provide a clear read-across to future published policy and strategy.

The study has included the analysis of a range of datasets, including travel to work, house price, household characteristic, income and migration, to assess the market linkages within and between the Plymouth, Cornwall, South Hams, West Devon and Dartmoor National Park sub-regional area.

This analysis has looked at both strategic market geographies and local market geographies. The former represents an important consideration in the development of policies which align with the ethos of the NPPF, which encourages strategic planning across local boundaries.

This Executive Summary uses a similar structure to the Main SHMNA Report with the analysis presented under two sections:

- The Current Housing Market
- The Future Housing Market

Cornwall is the second largest local authority area in the South West and is distinctive due to its long coastline, forming the northern, southern and western boundaries. Cornwall is diverse in character; many areas are affluent, which contrasts with some areas being amongst the most disadvantaged areas in the UK.

Cornwall is characterised by a dispersed settlement pattern. Nine towns have a population of over 10,000 (five over 20,000) while a further seventeen small towns have around 5,000 residents. These sit among many other sizable villages and hamlets.

The Scale of Housing Required

A detailed analysis of demographic, market and economic drivers has been undertaken in order to identify a proposed dwelling requirement for Cornwall over the period 2011 to 2031.

The number of households is forecast to grow over the period 2011 and 2031 by between 45,900 and 69,900. The lower level of projected household growth is based upon a demographic trend based scenario (Re-based SNPP 2010) which uses the latest data around natural change and migration to project forward a continuation of recent historical population dynamics. The higher level of household change is estimated through the application of an employment-led constraint on the demographic projections (Employment-led Oxford Economics scenario).

Within Cornwall, internal migration (movement in and out of the authority from other parts of the UK) has been a fundamental driver of population change in recent years. The projection under this scenario anticipates that these migration trends will continue in the future.

Under the Re-based 2010 scenario the labour-force would grow by some 15,000 people. Whilst this is a healthy level of growth it does not align with the scale of the future employment growth suggested by the two economic forecasts, which predict a higher level of in-migration into the authority, rather than commuting levels increasing, which drives the higher levels of projected household growth noted within the Overview Report.

The Type and Size of Housing Required

In line with the NPPF, it is important to understand the type and size of housing likely to be required over the plan period. This provides an important evidence base, not only for the development of policy, but also one to which developers and house builders can consult to assist in understanding the long term needs to which housing developments should respond.

It should be noted that wider market factors will have an impact on the ability of households to realise their aspirations, i.e. the availability of mortgage finance, economic security and wider changes to linked financial factors, such as the cost of energy and Council Tax variations.

Whilst the uncertainties around these factors highlights the importance of allowing a degree of flexibility in the housing market, in terms of the mix of housing required, it is important to consider the implications of the long-term projections in a strategic sense, in particular set against the current stock profile. The following are therefore important considerations:

- The types of household are projected to change, with the ageing population noted above one influencing factor. Primarily, the projections show a notable increase in single person and couple households with this driven in significant part by the increasing number of older person households.

- The analysis suggests that there may be a high demand for smaller properties suitable for meeting the needs of older person households within the authority. Under the Employment-led scenario the growth in family households, aged 25 – 44 in particular is relatively significant, suggesting a sustained demand under this scenario for traditional family housing (3 and 4 bedroom), recognising that moderate and larger properties represent the aspirations for many households of different ages.

Households in Housing Need

The analysis has also included an assessment of the breakdown of future needs for different tenures of housing. The emphasis within the DCLG Guidance is on understanding these tenure requirements over a shorter time frame of 5 years.

There is a recognition that the balance of tenures across the authority has not to date fully met the housing needs of households. The market position summarised in the Cornwall Current Market section highlighted the affordability issues facing many households, in particular newly forming households.

- The analysis of the current need for affordable housing in the authority over the next five years indicates a high demand for this tenure. An annual net need of 1,314 new affordable properties is calculated as being required to meet newly arising need over the next five years as well as the existing backlog. The level of overall need reflects the impact of rising house prices over the first half of the last decade and the continued pressures on wages (i.e. household income) as well as the availability/ affordability of mortgage finance. It also reflects the fact that affordable housing makes up a relatively low proportion of the overall stock in the

authority currently, approximately 12%, a proportion which is considerably below the national average of 17%.

- In order to maintain a level of working age population to match employment opportunities, there will be a sustained need for family housing within the authority.

- Specifically in terms of affordable housing the analysis indicates that there will be a high demand for smaller properties, 1 – 2 bed, with need for this size of property making up 82% of total need. Importantly, however, the lower levels of turnover in larger properties also suggests that in order to address future need and the current backlog, new larger affordable properties will also be required to allow choice within the housing market.

The impact of current housing market conditions

The following recommendations need to be considered in the setting of policy:

- Reduction in the availability of grant monies to aid in the delivery of affordable housing places greater pressure on delivering affordable housing tenures through traditional Planning Obligation approaches. This requires a pro-active and responsive approach to enabling more viable housing sites to come forward earlier in the plan period. A pro-active approach in encouraging the delivery of more viable housing sites will be important in addressing the wider demand for all tenures of housing and assist in ensuring that households access to market housing is not further deteriorated through a continued lack of supply, which is likely to continue to drive up house prices.

- A careful balance is required in terms of other competing requirements through Planning Obligations if the delivery of affordable housing is to be prioritised. This includes the future setting of CIL targets and the balancing of aspirations to deliver other linked improvements for example green space or off-site community benefits. Consideration needs to be given to the appropriate allocation of New Homes Bonus to local communities to ensure that the benefits of development are realised by affected areas without impacting on the viability of development and the capacity to deliver affordable housing.

- The needs of households will need to be met through a spectrum of different affordable housing products. The SHMNA analysis has indicated that whilst a notable proportion of households in need will require social housing other affordable products including Intermediate tenure properties will be able to address the needs of some households and should therefore form part of any new provision delivered across the authority.

1.   Introduction to the Cornwall SHMNA Overview Report

1.1   This appendix document should be read in conjunction with the Strategic Housing Market Needs Assessment (SHMNA) Main Report. It should be noted that the SHMNA forms a part of the evidence base for Local Plans and does not constitute planning policy.

1.2   The Main SHMNA Report presents the analysis and results for each of the five study area authorities and should be used as the principal document to inform the development of policy and strategy. The analysis presented within this Appendix document serves to complement the Main SHMNA Report providing additional analysis at a sub-market level against a number of core outputs. The definition and rationale for the sub-markets used within this Overview Report are included at the end of this section. The full details of the modelling and research methodologies used to arrive at the conclusions presented within this Overview Report are documented in full within the Main SHMNA Report.

1.3   This Overview Report uses a similar structure to the Main SHMNA Report with the analysis presented under two sections:

- Section 2: The Current Housing Market

- Section 3: The Future Housing Market

1.4   Within this structure the findings are presented under the headings of the Core Outputs as set out within the DCLG SHMA Guidance (August 2007).

1.5   This Overview Report does not include a separate detailed analysis of the housing requirements of specific groups. The analysis within the Future Housing Market section provides analysis of the different types and ages of households which complements the analysis presented in section 8 of the Main SHMNA Report.

1.6   This Overview Report concludes with a 'Bringing the Evidence Together' section. This draws together the conclusions for the local authority and incorporates a section examining the implications for future policy and strategy development.

Introducing Cornwall

1.7   Cornwall is the most south westerly tip of the United Kingdom, covering an area of 3,559 sq km. It is the second largest local authority area in the South West. Cornwall is distinctive with a coastline 697km long. The sea forms the northern, southern and western boundaries, with the River Tamar forming the eastern border with Devon and Plymouth, giving it its strong maritime character.

1.8   Cornwall encompasses a diverse environment and rich economic and cultural history; the quality of which attracts residents, visitors and businesses alike. Cornwall is an area of many contrasts and varied landscapes with remote rural, coastal and environmentally sensitive areas, interspersed with villages and historic market towns. Many areas are affluent contrasting with some areas being among the most disadvantaged areas in the UK.

1.9   Cornwall is characterised by a dispersed settlement pattern. Nine towns have a population of over 10,000 (five over 20,000) while a further seventeen small towns have around 5,000 residents. These sit among many other sizable villages and hamlets.

The Policy Context

1.10   Cornwall Council is currently preparing the Cornwall Local Plan – Strategic Policies (formerly known as the Core Strategy), which has been subject to two rounds of consultation since 2011.

1.11   The emerging Local Plan sets the authorities' main planning approach and policies that will help to manage development to 2030. Policy 2 – Key targets and Spatial Strategy sets out that new development should provide the most sustainable approach to accommodating growth; making the best use of infrastructure and services whilst respecting the character of Cornwall. Overall, the current version of the Local Plan states that development should seek to provide for 42,250 homes over the plan period at an average rate of about 2,100 per year to 2030.

1.12   Until the Local Plan for the Cornwall Council planning authority is adopted, planning policy in use within each of the former District's and the County Council at the 31st March 2009 will continue to have some weight.

1.13   Given the stage of formulation of the Cornwall Local Plan the research presented through the SHMNA will be used to inform the final development of policies on housing growth and requirements.

Cornwall – Sub-market Geographies

Introducing the Sub-markets

1.14   Cornwall Council has sub-divided the housing market within the authority into 19 community network areas (sub-markets), which are built up from parishes, and are based on the main towns and surrounding rural areas which relate to them.

1.15   The purpose of the community network for the Council is to:

- involve local communities in improving local services;

- identify, agree and then deliver local priorities;

- enable local councillors to have more influence over the delivery of services to the communities they represent; and

- enable communities to make choices about the way in which services are delivered in their areas.

1.16   The 19 community network areas are: Bodmin; Bude; Caradon; Camborne, Pool and Redruth; Camelford; China Clay area; Cornwall Gateway; Falmouth and Penryn; Hayle and St Ives; Helston and the Lizard; Launceston; Liskeard and Looe; Newquay and St Columb; West Penwith, St Agnes and Perranporth; St Austell; St Blazey, Fowey and Lostwithiel; Truro and Roseland; Wadebridge and Padstow.

1.17   The community network areas have been used within the SHMNA to provide a greater understanding of the operation of the Cornwall housing market below the local authority scale. The community network areas are presented spatially in Figure 1.1 overleaf.

Figure 1.1: Sub-market geographies – Community Network Areas
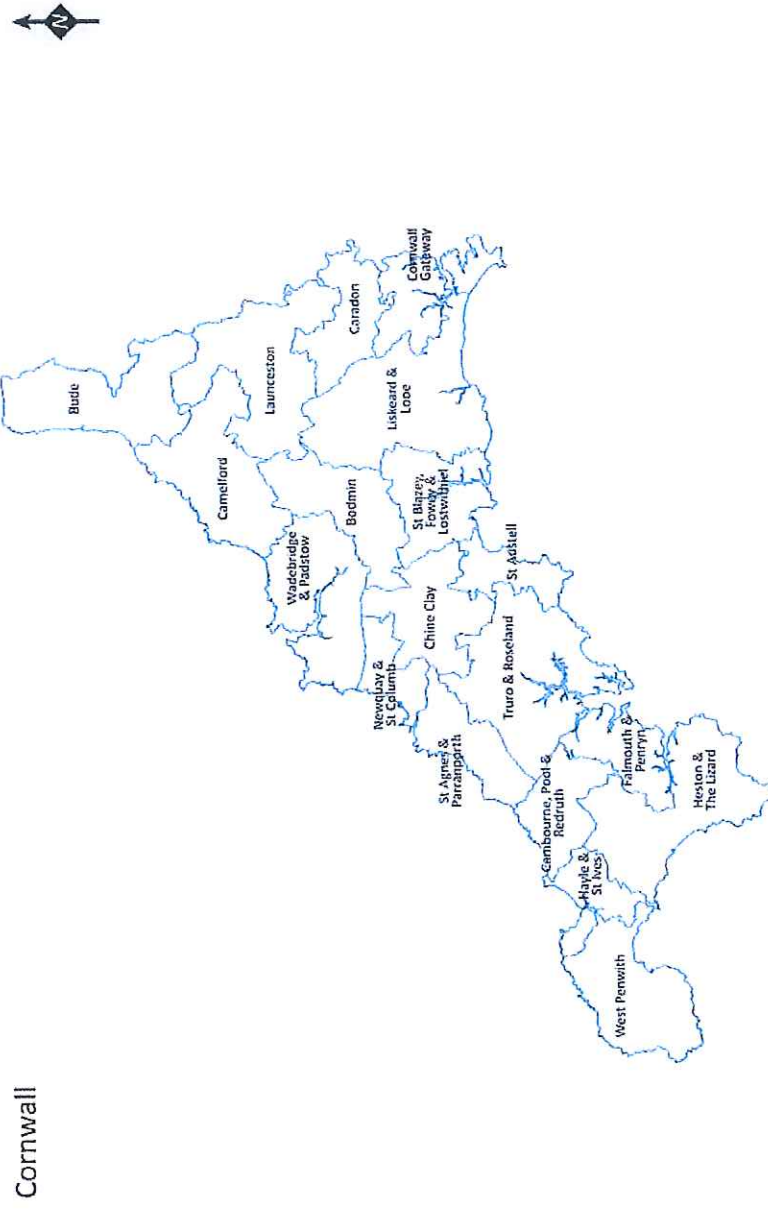
Cornwall

2.   The Current Housing Market

2.1   This section summarises the SHMNA analysis of the current housing market for Cornwall. The section is structured around the DCLG core outputs 1 and 2.

2.2   The section provides a more locally tailored narrative of the 'housing stock' position, the 'active market' and the 'key drivers of the housing market'. Wherever possible data has been mapped to provide a greater understanding of variance and relative performance at a sub-local authority level.

2.3   The key findings for Cornwall are included up front for each DCLG Output for ease of reference.

DCLG Output 1 – Estimates of current dwellings in terms of size, type, condition, tenure

2.4   A synopsis of the authority's current stock position is summarised through the following:

- Cornwall has a total of 259,346 dwellings, 28,957 of these are currently classified as vacant, equating to 11% of total stock[1];

- A total of 27,305 houses have been built within Cornwall since 2001[2]. This represents an average of 2,482 per annum over the last 11 years. Despite the recession and housing market downturn from 2008, delivery levels in Cornwall have remained relatively stable over the period and in line with, or in excess of, housing targets set.

- The profile of the housing by type shows that around 38% of homes are detached, 24% are semi-detached, 23% are terraced, 26% are flats with the remainder being classified as other[3]. The relatively high proportions of detached homes are a reflection of the historical development of Cornwall as well as the significance of the agricultural industry in the area over time. This stock profile is also reflected in the size of properties, with the average number of rooms per household in 2011 being 5.6 and the average number of bedrooms 2.8.

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[1] Source: Census 2011

[2] Source: Census 2011

[3] Other includes people living in an 'unshared dwelling caravan or other mobile or temporary structure' or a 'shared dwelling'

- The latest stock condition data (2009) shows that 55% of the private stock across the authority is classified as non-decent[4];

- According to the 2011 Census 2.6% of households are classified as living in overcrowded conditions; and

- In terms of the tenure of housing the 2011 Census shows that 40% of households in Cornwall own their own property outright, 29% own their property with a mortgage, 12% live in social housing (registered social housing provider rental property), 1% live in shared ownership housing, and 15% live in the private rented sector (landlord or letting agency) with a further 4% living in other tenures (2% private rented other and 2% living rent free). Analysis of the change in tenure profile from 2001 indicates that the private rented sector has proportionally grown the most in Cornwall, with 16.7% of households in this tenure in 2011 (including private rented other), increasing from 15.9% in 2001.

2.5   The distribution of new stock has not been evenly distributed across the authority. The following plan uses data supplied by the local planning authority to illustrate the spatial distribution of development at a local level between 2001 - 2012.

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[4] Source: *The Condition of Private Sector Housing in the South West Region* – South West Regional Assembly, March 2009

Figure 2.1: Local level analysis of Completions

CORNWALL COMPLETIONS 2001 - 2012

0
1 to 50
50 to 99
100 to 249
250 to 699
700 to 999
1,000 +
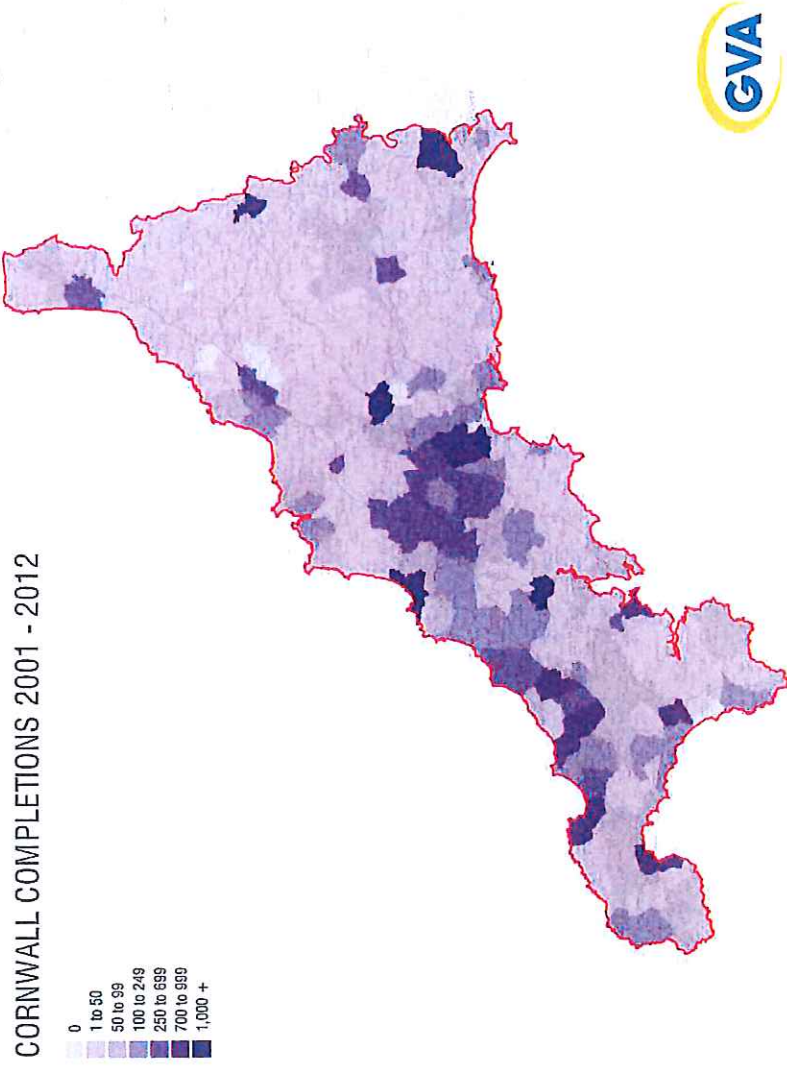
Source: GVA, 2013, Cornwall Council data, 2013

2.6   Over the following pages detailed local level mapping from the 2011 Census is included focusing on housing stock indicators. These maps reveal the spatial distinctiveness of the housing markets across the authority. Each plan's key uses the mid-point as the England and Wales average proportion to indicate if spatial areas record above or below proportions of each indicator. The mapping is complemented through analysis of tabulated data at the community network level. The following key spatial findings emerge in relation to the stock profile of different parts of the authority:

- Large contiguous concentrations of detached stock in the north and east of Cornwall, including the community network areas of Bude and Launceton and surrounding areas to Wadebridge and Padstow. Smaller concentrations dispersed across the remaining areas of Cornwall.

- Relatively consistent patterns of semi-detached stock being concentrated in those community network areas also containing higher proportions of detached properties.

- Isolated "pockets" of terraced property concentrations, relative to the national average, in community network areas such as Camborne and Redruth and Penzance, Marazion and St Just. Similar spatial patterns in evidence in relation to flatted properties.

- Bedroom spaces – spatial trends corresponding with the pattern of property types. Higher numbers of bedroom spaces correspond with areas exhibiting concentrations of semi-detached and detached homes. Lower numbers of bedroom spaces generally correspond with those areas which contain concentrations of terraced and flatted properties. Trends associated with number of rooms also correspond with this spatial pattern.

- The pattern of household spaces with no usual resident[5] is more uniform, however it is relatively high compared to national averages. Many community network areas across Cornwall exhibit 8% of household spaces with no usual residents. There are relatively few community network areas with lower levels. One such area is Camborne and Redruth.

- In terms of tenure patterns, there are particular concentrations of a high proportion of property "owned outright" in Bodmin, Truro and Roseland, Falmouth and Penryn, Bude and Helston and the Lizard.

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[5] A household space is the accommodation used or available for use by an individual household. A household space with no usual residents may still be used by short-term residents, visitors who were present on census night or a combination of short-term residents and visitors. Vacant household spaces and household spaces that are used as second addresses are also classified in census results as household spaces with no usual residents.

- Owner occupation with a mortgage exhibits concentrations in the following areas: China Clay; St Agnes and Perranporth; Camborne and Redruth; Launceton; Callington and Saltash and Torpoint.

- Concentrations of social rented and shared ownership property are far less prevalent in the tenure patterns of Cornwall. There is a pattern of more isolated concentrations of this tenure in community network areas including but not limited to: Hayle and St Ives; Truro and Roseland; Bodmin and Camborne and Redruth.

- Concentrations of private rented property are in evidence in: Wadebridge and Padstow; Newquay and Helston and the Lizard.

Figure 2.2: Dwelling Type – All categories

Community Network Areas	Detached	Semi-Detached	Terraced	Flat, Maisonette or Apartment	Other	Total
Bodmin	36.9%	25.9%	23.2%	12.5%	1.6%	100%
Bude	47.0%	25.2%	15.0%	12.5%	0.7%	100%
Caradon	47.2%	25.5%	19.2%	5.8%	2.2%	100%
Camborne Pool and Redruth	31.2%	25.8%	30.5%	11.5%	1.4%	100%
Camelford	55.1%	21.7%	13.9%	7.5%	1.8%	100%
China Clay	37.1%	32.0%	19.5%	4.8%	6.6%	100%
Falmouth and Penryn	29.9%	23.9%	23.8%	21.1%	1.6%	100%
Hayle and St Ives	32.2%	21.0%	28.2%	17.9%	0.8%	100%
Helston and the Lizard	48.8%	22.3%	18.0%	8.0%	2.9%	100%
Launceston	45.7%	21.6%	18.6%	12.9%	1.3%	100%
Liskeard and Looe	40.2%	24.7%	21.1%	13.4%	0.7%	100%
Newquay & St Columb	29.2%	22.7%	19.0%	26.6%	2.7%	100%
West Penwith	28.1%	20.4%	33.6%	17.5%	1.0%	101%
Cornwall Gateway	28.9%	28.1%	29.9%	11.7%	1.4%	100%
St Agnes and Perranporth	46.9%	19.5%	17.0%	15.1%	1.7%	100%
St Austell	42.8%	25.2%	16.8%	14.1%	1.4%	100%
St Blazey, Fowey and Lostwithiel	36.6%	29.3%	22.7%	9.4%	1.9%	100%
Truro and Roseland	39.3%	26.0%	21.7%	12.7%	0.4%	100%
Wadebridge and Padstow	48.0%	23.5%	16.8%	10.2%	1.5%	100%
Cornwall (Total)	37.6%	24.4%	22.8%	13.5%	1.7%	100%

Source: Census 2011

Figure 2.3: Dwelling Type – Detached Properties

N

1 - Bude
2 - Launceston
3 - Callington
4 - Saltash & Torpoint
5 - Camelford
6 - Bodmin
7 - Liskeard & Looe
8 - Wadebridge & Padstow
9 - Newquay
10 - China Clay
11 - St Blazey, Fowey & Lostwithiel
12 - St Agnes & Perranporth
13 - Truro & Roseland
14 - St Austell & Mevagissey
15 - Camborne & Redruth
16 - Falmouth & Penryn
17 - Hayle & St Ives
18 - Helston & the Lizard
19 - Penzance, Marazion & St Just

Detached
(% of Households)

- Over 55%
- 35% - 55%
- 22.6% - 35%
- 15% - 22.6%
- 10% - 15%
- Less than 10%
- Dartmoor

Source: Census 2011

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Source: Census 2011

Figure 2.4: Dwelling Type – Semi-Detached Properties

1 - Bude
2 - Launceston
3 - Callington
4 - Saltash & Torpoint
5 - Camelford
6 - Bodmin
7 - Liskeard & Looe
8 - Wadebridge & Padstow
9 - Newquay
10 - China Clay
11 - St Blazey, Fowey & Lostwithiel
12 - St Agnes & Perranporth
13 - Truro & Roseland
14 - St Austell & Mevagissey
15 - Camborne & Redruth
16 - Falmouth & Penryn
17 - Hayle & St Ives
18 - Helston & the Lizard
19 - Penzance, Marazion & St Just

Semi-Detached
(% of Households)

Over 55%
40% - 55%
30.7% - 40%
25% - 30.7%
20% - 25%
Less than 20%
Dartmoor

Source: Census 2011

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Strategic Housing Market Needs Assessment

Source: Census 2011

Figure 2.5: Dwelling Type – Terraced Properties

N

1 - Bude
2 - Launceston
3 - Callington
4 - Saltash & Torpoint
5 - Camelford
6 - Bodmin
7 - Liskeard & Looe
8 - Wadebridge & Padstow
9 - Newquay
10 - China Clay
11 - St Blazey, Fowey & Lostwithiel
12 - St Agnes & Perranporth
13 - Truro & Roseland
14 - St Austell & Mevagissey
15 - Camborne & Redruth
16 - Falmouth & Penryn
17 - Hayle & St Ives
18 - Helston & the Lizard
19 - Penzance, Marazion & St Just

Terraced
(% of Households)

Over 35%
30% - 35%
24.7% - 30%
18% - 24.7%
15% - 18%
Less than 15%
Dartmoor

Source: Census 2011

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Source: Census 2011

Figure 2.6: Dwelling Type – Flatted Properties

**Flats
(% of Households)**

- Over 30%
- 25% - 30%
- 21.6% - 25%
- 18% - 21.6%
- 10% - 18%
- Less than 10%
- Dartmoor

Source: Census 2011

1 - Bude
2 - Launceston
3 - Callington
4 - Saltash & Torpoint
5 - Camelford
6 - Bodmin
7 - Liskeard & Looe
8 - Wadebridge & Padstow
9 - Newquay
10 - China Clay
11 - St Blazey, Fowey & Lostwithiel
12 - St Agnes & Perranporth
13 - Truro & Roseland
14 - St Austell & Mevagissey
15 - Camborne & Redruth
16 - Falmouth & Penryn
17 - Hayle & St Ives
18 - Helston & the Lizard
19 - Penzance, Marazion & St Just

Strategic Housing Market Needs Assessment

Source: Census 2011

Figure 2.7: Average Number of Rooms / Bedrooms

Community Network Areas	Average Number of Rooms Per Household	Average Number of Bedrooms Per Household
Bodmin	5.6	2.8
Bude	5.8	2.8
Caradon	5.9	2.9
Camborne Pool and Redruth	5.4	2.6
Camelford	5.9	2.9
China Clay	5.6	2.8
Falmouth and Penryn	5.5	2.8
Hayle and St Ives	5.5	2.8
Helston and the Lizard	5.8	2.9
Launceston	5.9	2.9
Liskeard and Looe	5.6	2.8
Newquay & St Columb	5.3	2.7
West Penwith	5.3	2.6
Cornwall Gateway	5.6	2.8
St Agnes and Perranporth	5.7	2.8
St Austell	5.6	2.8
St Blazey, Fowey and Lostwithiel	5.7	2.8
Truro and Roseland	5.8	2.9
Wadebridge and Padstow	5.8	2.9
Cornwall (Total)	**5.6**	**2.8**

Source: Census 2011

Figure 2.8: Number or Bedrooms

N

1 - Bude
2 - Launceston
3 - Callington
4 - Saltash & Torpoint
5 - Camelford
6 - Bodmin
7 - Liskeard & Looe
8 - Wadebridge & Padstow
9 - Newquay
10 - China Clay
11 - St Blazey, Fowey & Lostwithiel
12 - St Agnes & Perranporth
13 - Truro & Roseland
14 - St Austell & Mevagissey
15 - Camborne & Redruth
16 - Falmouth & Penryn
17 - Hayle & St Ives
18 - Helston & the Lizard
19 - Penzance, Marazion & St Just

Average Bedrooms
Per Household

Over 3.1
2.9 - 3.1
2.7 - 2.9
2.6 - 2.7
2.5 - 2.6
Less than 2.5
Dartmoor

Source: Census 2011

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Figure 2.9: Number of Rooms

1 - Bude
2 - Launceston
3 - Callington
4 - Saltash & Torpoint
5 - Camelford
6 - Bodmin
7 - Liskeard & Looe
8 - Wadebridge & Padstow
9 - Newquay
10 - China Clay
11 - St Blazey, Fowey & Lostwithiel
12 - St Agnes & Perranporth
13 - Truro & Roseland
14 - St Austell & Mevagissey
15 - Camborne & Redruth
16 - Falmouth & Penryn
17 - Hayle & St Ives
18 - Helston & the Lizard
19 - Penzance, Marazion & St Just

Average Rooms
Per Household

- Over 6.3
- 5.8 - 6.3
- 5.4 - 5.8
- 5.1 - 5.4
- 4.7 - 5.1
- Less than 4.7
- Dartmoor

Source: Census 2011

Strategic Housing Market Needs Assessment

Source: Census 2011

Figure 2.10: Household Spaces with No Usual Residents (2011)

Community Network Areas	All Household Spaces	Household Spaces With No Usual Residents	Household Spaces With No Usual Residents (%)
Bodmin	8,819	551	6.2%
Bude	8,528	1,191	14.0%
Caradon	8,243	459	5.6%
Camborne Pool and Redruth	26,746	1,391	5.2%
Camelford	6,440	1,124	17.5%
China Clay	11,088	656	5.9%
Falmouth and Penryn	20,260	1,906	9.4%
Hayle and St Ives	13,496	2,251	16.7%
Helston and the Lizard	15,582	1,864	12.0%
Launceston	8,441	605	7.2%
Liskeard and Looe	15,791	1,891	12.0%
Newquay & St Columb	13,158	1,771	13.5%
West Penwith	20,544	2,684	13.1%
Cornwall Gateway	15,190	976	6.4%
St Agnes and Perranporth	8,875	1,296	14.6%
St Austell	14,848	1,416	9.5%
St Blazey, Fowey and Lostwithiel	9,547	1,228	12.9%
Truro and Roseland	21,323	1,962	9.2%
Wadebridge and Padstow	12,427	3,735	30.1%
Cornwall (Total)	259,346	28,957	11.2%

Source: Census 2011

Figure 2.11: Proportion of household spaces with no usual resident

No Usual
Resident (% of HH)

- Over 8%
- 6% - 8%
- 4.4% - 6%
- 2% - 4.4%
- 1% - 2%
- Less than 1%
- Dartmoor

Source: Census 2011

1 - Bude
2 - Launceston
3 - Callington
4 - Saltash & Torpoint
5 - Camelford
6 - Bodmin
7 - Liskeard & Looe
8 - Wadebridge & Padstow
9 - Newquay
10 - China Clay
11 - St Blazey, Fowey & Lostwithiel
12 - St Agnes & Perranporth
13 - Truro & Roseland
14 - St Austell & Mevagissey
15 - Camborne & Redruth
16 - Falmouth & Penryn
17 - Hayle & St Ives
18 - Helston & the Lizard
19 - Penzance, Marazion & St Just

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Source: Census 2011

Figure 2.12: Overcrowding(bedroom occupancy rating)

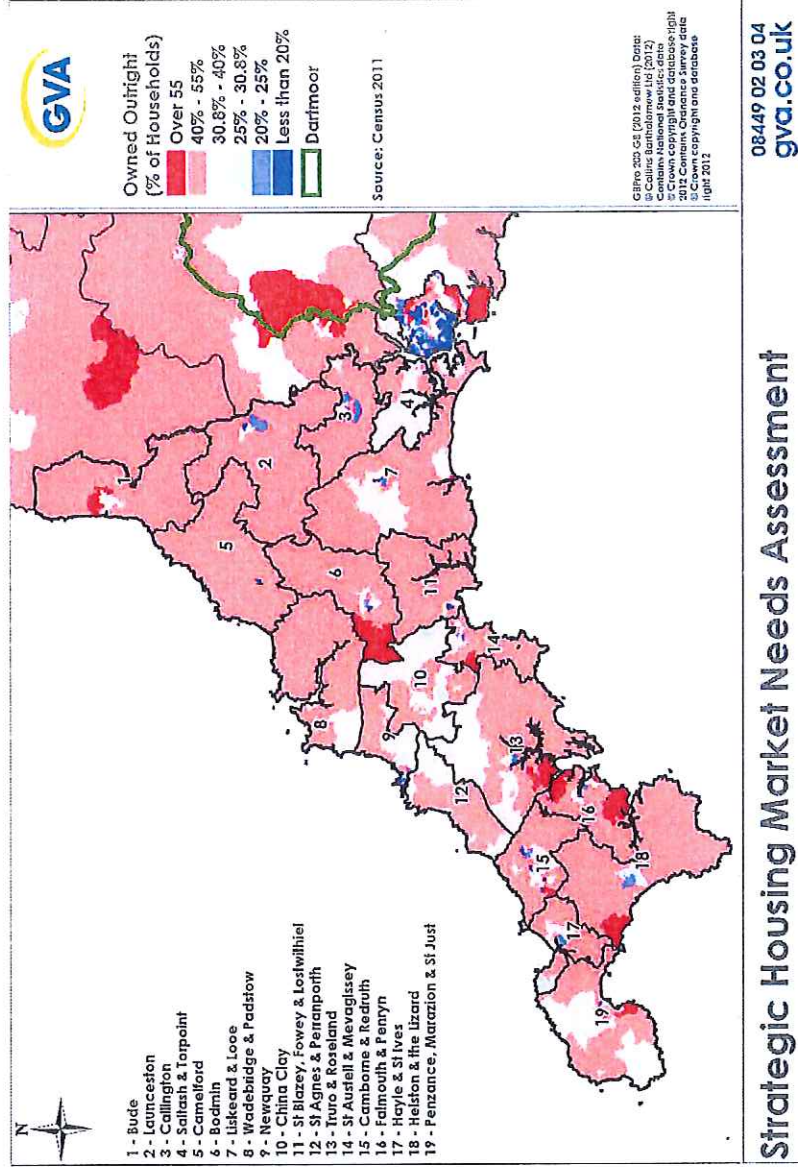| Community Network Areas	Occupancy Rating (Bedrooms) of -1 or Less (% of Households)	Average Number of Bedrooms Per Household
Bodmin	2.8%	2.8
Bude	1.7%	2.8
Caradon	2.0%	2.9
Camborne Pool and Redruth	3.6%	2.6
Camelford	1.8%	2.9
China Clay	2.7%	2.8
Falmouth and Penryn	3.2%	2.8
Hayle and St Ives	2.9%	2.8
Helston and the Lizard	2.2%	2.9
Launceston	2.3%	2.9
Liskeard and Looe	2.2%	2.8
Newquay & St Columb	3.2%	2.7
West Penwith	2.7%	2.6
Cornwall Gateway	1.8%	2.8
St Agnes and Perranporth	2.1%	2.8
St Austell	2.6%	2.8
St Blazey, Fowey and Lostwithiel	2.3%	2.8
Truro and Roseland	2.5%	2.9
Wadebridge and Padstow	2.5%	2.9
Cornwall (Total)	2.6%	2.8

Source: Census 2011

Figure 2.13: Tenure – All categories

Community Network Areas	All Households	Owned; Owned Outright	Owned; Owned with a Mortgage or Loan	Shared Ownership (Part Owned and Part Rented)	Social Rented; (Local Authority& Other)	Private Rented; Private Landlord or Letting Agency	Private Rented; Other	Living Rent Free
Bodmin	8,268	35.6%	28.9%	0.4%	17.2%	14.8%	1.7%	1.4%
Bude	7,337	45.4%	24.6%	1.3%	11.2%	14.1%	1.5%	1.9%
Caradon	6,813	42.9%	30.5%	1.2%	10.2%	11.8%	1.6%	1.8%
Camborne Pool and Redruth	25,355	37.5%	31.1%	0.6%	12.8%	15.2%	1.6%	1.2%
Camelford	5,316	47.1%	26.9%	0.6%	8.9%	12.4%	2.1%	2.1%
China Clay	10,432	35.1%	35.1%	1.4%	9.7%	16.1%	1.6%	1.0%
Falmouth and Penryn	18,354	39.4%	26.5%	0.7%	12.8%	16.8%	2.0%	1.7%
Hayle and St Ives	11,245	41.8%	27.7%	1.2%	12.7%	13.0%	1.9%	1.6%
Helston and the Lizard	13,718	42.1%	30.0%	0.5%	9.7%	12.5%	3.6%	1.7%
Launceston	7,836	38.6%	29.2%	0.7%	10.4%	17.5%	1.7%	1.8%
Liskeard and Looe	13,900	40.8%	28.1%	0.5%	12.9%	14.0%	1.9%	1.8%
Newquay & St Columb	11,387	33.0%	31.1%	0.7%	10.8%	19.2%	3.3%	1.7%
West Penwith	17,860	40.4%	23.7%	0.6%	15.2%	16.2%	1.9%	2.1%
Cornwall Gateway	14,214	36.8%	34.8%	0.7%	12.6%	11.7%	2.0%	1.3%
St Agnes and Perranporth	7,579	43.3%	29.6%	0.9%	7.3%	14.6%	2.4%	1.9%
St Austell	13,432	42.8%	27.8%	0.9%	10.5%	14.7%	1.8%	1.4%
St Blazey, Fowey and Lostwithiel	8,319	42.9%	28.2%	0.4%	11.0%	13.8%	1.8%	1.7%
Truro and Roseland	19,361	39.9%	28.0%	1.0%	12.4%	15.1%	1.7%	1.9%
Wadebridge and Padstow	8,692	44.4%	23.7%	0.6%	13.5%	12.9%	2.5%	2.3%
Cornwall (Total)	**229,418**	**40%**	**28.80%**	**0.80%**	**12.00%**	**14.70%**	**2.00%**	**1.70%**

Source: Census 2011

Figure 2.14: Tenure – Owned Outright

Owned Outright
(% of Households)

Over 55
40% - 55%
30.8% - 40%
25% - 30.8%
20% - 25%
Less than 20%
Dartmoor

Source: Census 2011

N

1 - Bude
2 - Launceston
3 - Callington
4 - Saltash & Torpoint
5 - Camelford
6 - Bodmin
7 - Liskeard & Looe
8 - Wadebridge & Padstow
9 - Newquay
10 - China Clay
11 - St Blazey, Fowey & Lostwithiel
12 - St Agnes & Perranporth
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Source: Census 2011

Figure 2.15: Tenure – Owned with a mortgage

N

1 - Bude
2 - Launceston
3 - Callington
4 - Saltash & Torpoint
5 - Camelford
6 - Bodmin
7 - Liskeard & Looe
8 - Wadebridge & Padstow
9 - Newquay
10 - China Clay
11 - St Blazey, Fowey & Lostwithiel
12 - St Agnes & Perranporth
13 - Truro & Roseland
14 - St Austell & Mevagissey
15 - Camborne & Redruth
16 - Falmouth & Penryn
17 - Hayle & St Ives
18 - Helston & the Lizard
19 - Penzance, Marazion & St Just

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Owned with a
Mortgage (% of HH)

Over 45%
40% - 45%
32.7% - 40%
25% - 32.7%
15% - 25%
Less than 15%

Dartmoor

Source: Census 2011

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Source: Census 2011

Figure 2.16: Tenure – Social Rented & Shared Ownership

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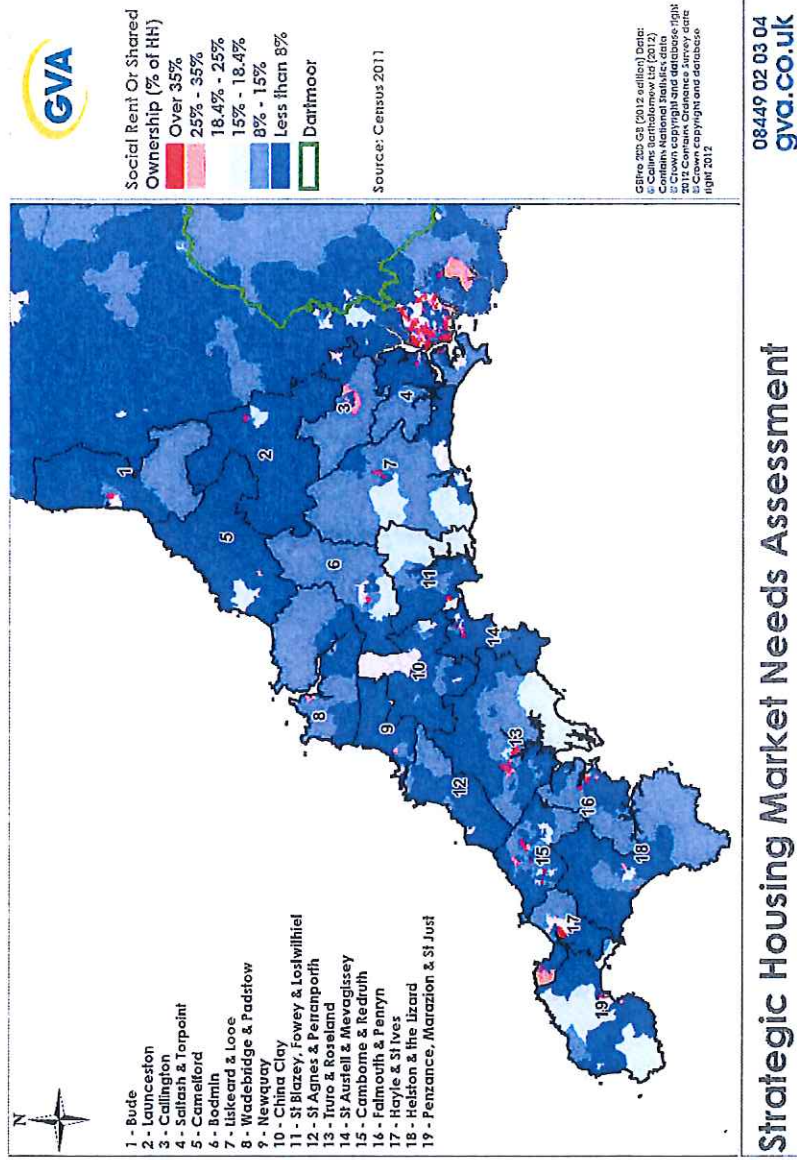
Source: Census 2011

Figure 2.17: Tenure – Private rented (including renting from a landlord or letting agency, private rented other and living rent free)

Private Rent or Rent Free (% of HH)
- Over 29%
- 21% - 29%
- 18.1% - 21%
- 14% - 18.1%
- 10% - 14%
- Less than 10%
- Dartmoor

1 - Bude
2 - Launceston
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17 - Hayle & St Ives
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19 - Penzance, Marazion & St Just

Source: Census 2011

Strategic Housing Market Needs Assessment

Source: Census 2011