



THE CORNWALL WE KNOW

JANUARY 2020 SNAPSHOT INCLUDING COVID-19 UPDATES

Cornwall and Isles of Scilly
Leadership Board

This document underpins our evidence base to help shape our 2050 Vision for Cornwall. It focuses on identifying challenges and opportunities, and long-term drivers and trends, that will influence and shape the future of the Duchy for generations to come.

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OUR ENVIRONMENT

SUMMARY

This document underpins our evidence base to help shape our 2050 Vision for Cornwall. It focuses on identifying challenges and opportunities, and long-term drivers and trends, that will influence and shape the future of the Duchy for generations to come.

OUR ECONOMY HAS GROWN AND WE HAVE REDUCED THE GAP IN AVERAGE WAGES.

Cornwall is a place of small yet mighty businesses, where entrepreneurship is for everyone, and is embedded in community. While tourism is an important catalyst for brand Cornwall, the COVID-19 pandemic has exposed our reliance on the visitor economy.

Embracing the potential in our ecosystem, investing in our green and blue economy and Cornwall as a 'thinking space' work location, will help attract innovative and technology-based companies and increase the resilience of our future economy. Investment in jobs, education and skills for young people and young entrepreneurs is required to retain wealth within the local economy, whilst the challenge of supporting local businesses will continue as they strive to recover from the significant impact of the pandemic, and the potential future risks of 'no deal' Brexit.

OUR SOCIAL INFRASTRUCTURE IS STRONG AND PLAYS A MAJOR ROLE IN BOOSTING THE SAFETY AND RESILIENCE OF OUR PEOPLE AND OUR COMMUNITIES.

Cornwall has a strong network of local town and parish councils, with a large and vibrant voluntary sector, and high levels of volunteering in its communities. However inequalities in health, education and safety outcomes exist between different groups of people and different places in Cornwall, with affluence sitting alongside some of the most disadvantaged areas in England.

Rural isolation is a challenge in accessing social networks and essential services. During the pandemic many residents celebrated how communities got closer together, however existing and hidden needs of many were also exposed, including for the elderly, disabled, homeless and people with mental health issues.



OUR STRONG, DISTINCTIVE LOCAL COMMUNITIES ARE THE BACKBONE OF CORNWALL WITH TWO IN FIVE PEOPLE LIVING IN SMALL SETTLEMENTS OF LESS THAN 3,000.

While there has been significant investment in public transport and superfast broadband, with parts of Cornwall more tech-ready than Greater Manchester, wi-fi 'not-spots' still remain and one in ten residents are not online. Digitisation is driving profound changes, including reducing use of high streets, as more of us shop online and work from home.

Housing remains a key issue throughout Cornwall, with the lack of suitable and affordable housing, particularly for young families, an ongoing concern with direct implications for the local economy, workforce and communities. Many communities also feel their infrastructure is at capacity and do not want more large greenfield extensions.

Housing remains a key issue throughout Cornwall, with the lack of suitable and affordable housing

OUR BEAUTIFUL ENVIRONMENT IS LOVED BY RESIDENTS AND VISITORS ALIKE YET IS HIGHLY FRAGILE.

Evidence shows that we must radically accelerate progress to avert imminent climate breakdown, with many of Cornwall's residents advocating that tackling climate change and protecting the environment should be our number one priority for the future.

Connection with nature is good for our health and wellbeing, with many people having enjoyed increased opportunities for walking and cycling during the pandemic. However, within Cornwall there are inequalities in access to green energies and nature, with increasing calls for safer infrastructure for cycling and walking, good and affordable public transport to provide a realistic alternative to car travel, and more and better recycling.



OUR SENSE OF PLACE IN THE WORLD BENEFITS FROM A RICH CULTURAL IDENTITY AND 'BRAND CORNWALL' AS A MAJOR ASSET, WITH A GLOBAL OUTLOOK DEEP IN OUR HERITAGE.

Cornwall's voice and influence within the UK suffers from a persistent urban-centric bias in policy and funding decisions. While the Cornish are now officially recognised as a national minority, more needs to be done to deliver associated obligations to nurture Cornish culture and language, alongside work to actively promote and celebrate the cultures of all minority ethnicities and faiths, as part of an inclusive and anti-racist Cornwall.

There is a desire for increased local decision making to include education and taxation, so Cornish residents are not negatively affected by national decisions.



In these unprecedented times, **The Cornwall We Know** is a fast-changing picture. COVID-19 has had rapid and significant impacts upon our health and wellbeing, our economy and our environment - and will continue to do so as the shape of the pandemic unfolds and Government support measures such as the job retention or furlough scheme come to an end. Likewise, in the coming weeks the EU Exit implementation period will come to an end, with academic studies showing Cornwall's exposure to "**no deal**" risks is amongst the highest in the country¹.

A summary of the impacts of COVID-19 upon Cornwall, accurate as at September 2020, is therefore included within this document; and within each chapter of this report, you will also find a more detailed snapshot of how the pandemic is affecting each aspect of life in Cornwall and Isles of Scilly.

The impact of COVID-19 and associated restrictions on Cornwall and Isles of Scilly residents and businesses has been significant. The heavy reliance on the retail, hospitality and tourism industries throughout the Duchy has meant many have faced employment and financial challenges, with the number of Cornwall residents claiming unemployment related benefits more than doubling between March and May, and support claimed

through the Government's furlough and self-employment schemes higher than regional and national averages. Food insecurity, debt and housing risk, particularly for private rental tenants, have become real life challenges for many, impacting on people's wellbeing and mental health. Potential job losses in Cornwall are estimated to be between 66,878 and 72,800². There is a strong place dimension, with spending data showing Penzance, Falmouth and Wadebridge are amongst the 20 worst affected towns in England and Wales³.

Potential job losses in Cornwall are estimated to be between

66,878
and
72,800



Far from being a great leveller, COVID-19 has thrown the major disparities that exist in the health and wealth of our communities into stark relief. Across the country, it is the poorest people who have died in greatest number; and it is our poorest places which are suffering the harshest economic shocks. Our equality impact assessment⁴ of the impact of the pandemic upon different communities in Cornwall illustrates how many of the existing gaps in outcomes for people from different backgrounds in Cornwall has widened.

Yet we have also witnessed the **power of community**, with thousands of acts of community kindness. We have seen repeated demonstration of the effectiveness of local solutions over

“one size fits all” central schemes. And we have glimpsed a cleaner, greener future as together we slashed our carbon emissions overnight. Our June 2020 residents survey provides further insight into the unexpected positive benefits of lockdown, as well as some of the adverse impacts on our residents⁵.

Inevitably, the scale and speed of these changes mean that the snapshot of **The Cornwall We Know** provided within this report will swiftly become out of date. We have therefore created a web-based intelligence platform to provide a dynamic picture of The Cornwall We Know, which is kept regularly updated with the latest evidence and analysis to support our recovery and renewal.

...it is our poorest places which are suffering the harshest economic shocks

You can see the very latest intelligence here:

https://letstalk.cornwall.gov.uk/the-cornwall-we-know/forum_topics/recovery_renewal_dashboard



UNDERSTANDING OUR DEMOGRAPHY

CORNWALL

By 2030, Cornwall's population is projected to reach around

627,000



The Duchy's median age is

47.2 years

Around **58%** of people are of working age



and **25%** of people are over 65 years



People over 65 years are forecast to make up nearly a third of the population by 2030 with 75+ numbers increasing significantly

By 2030 the number of young adults (15-24 years) is forecast to increase by

14%



ISLES OF SCILLY

The Isles of Scilly's population is forecast to reduce over the next 10 years to around

1,700 people



The Island's median age is

48 years

Around **57%** of people are of working age



and **27%** of people are over 65 years

The number of working age people, children (under 5 years) and births within the population are forecast to decline by 2030



CORNWALL

Currently home to around 577,727⁶ people, Cornwall's population has steadily grown⁷ over the past decade and is forecast to reach 627,314 by 2030, and to 662,097 in 2040⁸.

Around **58%** of the Cornish population are working age (16-64 years), and around **25%** aged over 65 years⁹, with the older demographic predicted to increase to **29%** of the overall population over the next 10 years. Cornwall's 'dependency ratio' is calculated at 0.71 compared to the 0.60 England average. The 'dependency ratio' is the ratio of non-working age people within a population (those aged 0-15 and over 65) to working age people and is useful in understanding the pressure in providing for the costs of services and benefits used by the youngest and oldest in a population¹⁰.

Inward migration to Cornwall by the 60-69 years age group continues to grow, likely driven by the attraction of Cornwall as a place to retire to in later life. The number of people aged 85 years and over in the area is forecast to increase by around 26% to 2030, as life expectancy and longevity increases due to advancements in medical care. Since 2011 Cornwall's median age has increased from 45.4 years to 47.2 years in 2018¹¹, and the area has the 17th highest median age out of 174 local authorities¹². The impact of an ageing population, on resources and services, is likely to be felt at an earlier stage in Cornwall than on other parts of the country.



The percentage of people aged 15-64 years within Cornwall is forecast to slightly dip by 2030 to 57% (from 59%) of the overall population, although migration of working age people to the Duchy (inward migration of 18-64 year old people) increased 19% between 2012 and 2018¹³. Inward migration from the working age population is likely driven by people moving out of urban areas into rural regions to improve their quality of life. Cornwall's high life satisfaction scores¹⁴ and low crime rates make it a desirable location for people to move to and start families.

The number of 15-24 year olds in Cornwall is projected to increase by 14% to 2030, and continue to make up 11% of the population overall, perhaps reflecting the expansion of higher education to attract young people to come to or remain and study within the area. Since 2012 the numbers of 15-19 year olds coming into Cornwall has increased, whilst the numbers leaving have remained broadly the same. Conversely, the number of 20-24 year olds leaving the area has increased over recent years, although by a small proportion, suggesting that greater employment opportunities may currently exist out of the Duchy.



Around 2%¹⁵ of the Cornish population identified as black, Asian, mixed race or other in 2017

ISLES OF SCILLY

The Isles of Scilly's overall population is projected to reduce over the next 10 years, from 2,067 to 1,671¹⁶.

As with England and Cornwall, the islands over 65 years demographic age group is predicted to increase by 2030, from 27% to 28% of the overall population. However the working age population is forecast to continue a declining trend, reaching around 900 (55% of the overall population) by 2030, compared to 1,185 (57%) in 2020¹⁷.

The number of 15-24 year olds is projected to rise slightly from 8% to 9.5% in 2030, however the forecast continued decrease in the number of under 5 year olds within the population (-6% 2011-2030), and the islands declining birth rate (-13% 2011-2018¹⁸), are likely to influence future demographic trends of the make-up of the younger generation and working population of the islands. The median age in the Isles of Scilly's increased from 46.1 years in 2011 to 48 years in 2018¹⁹. Only 1.2% of the population are non-white²⁰.

The working age population is forecast to continue a declining trend



UNDERSTANDING OUR ECONOMY

COVID-19
UPDATE

The economies of Cornwall and the Isles of Scilly have been significantly hit by the COVID-19 pandemic and associated restrictions, affecting businesses ability to operate and people's finances and livelihoods. **Cornwall's reliance on the visitor economy** (30% of private sector employment²¹), **high levels of self-employment** (21.6% of the workforce) and **small proportion of employment in large business** (66% of England average) means the impact has been felt hard.

Cornwall Council's Economic Growth analysis suggests potential net job losses could reach 72,800 in Cornwall (27% of total employment) as a result of the COVID-19 lockdown, with the majority being concentrated in 'accommodation and food services' (29,200) and 'wholesale, retail and motors' (21,300)²².

During the initial stages of the pandemic, 21% of businesses surveyed in Cornwall and Isles of Scilly had already laid staff off (est 1,128 individuals²³). In August, 83,400 employments in Cornwall and the Isles of Scilly were estimated to be supported by the Government's furlough scheme (a take up rate of 37% compared to 32% for England)²⁴, with the Government's second self-employment income support scheme grant having a take up rate of 55% in Cornwall and 61% in the Isles of Scilly²⁵.

Figures show the number of people in Cornwall starting on Universal Credit is growing, while the number of people claiming unemployment benefits more than doubled from March to April 2020, highlighting the financial challenges people are facing. The majority of industry sectors in Cornwall saw a decline in vacancies available in quarter 2 compared to 2019²⁶.

Visitors began to return to Cornwall and the Isles of Scilly as lockdown restrictions were lifted in June and staycations grew in popularity, with the **Eat Out to Help Out** scheme providing many local businesses the opportunity to regain some lost custom. Cornwall Council also launched a '**Keep it Cornish**' campaign to encourage residents and visitors to buy from Cornwall based companies. However, with the introduction of renewed restrictions and increase in COVID-19 cases in England²⁷, the risk to a full recovery in the hospitality and tourism industry, in the near term, remains high.



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Towns reliant on tourism and hospitality, for example Newquay and St Ives, have been highlighted as particularly vulnerable to the long-term impact of lockdown. Local jobs in hospitality, retail, agriculture and manufacturing are likely at risk, as sales decline due to a reduction in footfall²⁸, harvest season sees a loss in seasonal workers, and operations remain below full capacity²⁹. Business groups have also warned that city centres could become 'ghost towns' if workers do not return to offices³⁰, impacting small businesses that rely on passing trade.

In response, Cornwall Council³¹ has set up a number of support packages for residents and businesses³², including a '**Redundancy Support Task Force**' to offer support and advice to residents who are facing the threat of redundancy. Business support is also a key focus as restrictions and enforcement continue to change and adapt.

Although significant challenges now face Cornwall and Scillies economies, opportunities to invest in green and blue economies, and attract innovative and technology-based companies to the Duchy, exist. Economic recovery activity will include business survival, business recovery and business growth, with a particular focus on new approaches to town centres, more

sustainable approaches to tourism and promoting and investing in clean growth and low carbon economy³³.

Small and micro businesses are active in the local innovation space, with strong knowledge assets in renewable and marine technologies, geo-resources, agri-tech, space and satellite, and in the creative and digital sectors throughout the Duchy. A number of examples illustrate local innovation and development success and the potential for future economies:

- **Launchpad**³⁴ was developed by Falmouth University as a post-graduate programme to help create new digital businesses, including Codices, a technology business that has recently secured a £250k equity investment from Cornwall and Isles of Scilly Investment Fund³⁵.
- Newquay-based clean energy company **Bennamann Ltd**³⁶ has been testing a patent-pending engineering method to turn farm waste - such as cow manure and grass cuttings - into biomethane, a zero-carbon fuel which can be used to power heavy goods vehicles and farm machinery.
- **Cornish Lithium**³⁷, a mineral exploration and development company, has been exploring for lithium and other battery metals within Cornwall's historic mining

district. It recently announced it had found "globally significant" lithium grades in geothermal waters at United Downs Industrial Site, which have the potential to be used to generate zero-carbon electrical power and heat, as well as being a future ethical source of lithium.

- The **United Downs Deep Geothermal Power Project**³⁸ is the first geothermal power plant in the UK, with the aim of producing power and heat from the hot granite rocks beneath Cornwall at the United Downs Industrial Site.
- A recent joint report³⁹ by CIOs LEP and the Welsh Government identified that new floating **offshore wind farms** in the Celtic Sea could support up to 3,200 jobs in the South West and Wales, with a £682m spend in the local supply chain by 2030. The UK Government has also recently announced £160m investment for offshore wind farm development and the ambition to generate enough electricity to power every home in the UK by 2030^{40,41}. **Cornwall's Wave Hub**⁴² is one of three separate floating wind sites already in development in the Celtic Sea, with opportunities for new supply chain development as industrialisation requirements for this technology emerge.

JANUARY 2020 SNAPSHOT

Cornwall's low-income economy is greatly influenced by its business make-up – high % low paying sole proprietors and partnerships, micro-businesses, part-time time workers and dominant 'wholesale, retail and motors' sector - **Gross annual median wages are around**

80% ££
of the UK average

The majority of people in employment in the Isles of Scilly's work in the 'accommodation and food services', with


20% 
of businesses in the 'hotels and catering' sector

The cost of living in Cornwall is higher than in many other parts of the UK – houses are around **9x** 
the average gross annual wage (compared to 7x for England)


The economy has grown in recent years (GVA) – **however LEP research predicts GVA per job in Cornwall and the Isles of Scilly will be**

60.1%
of the England average by 2030 if current trends continue, or 80% with intervention

In 2017 GDP per head in Cornwall and Scilly was

68% 
of the EU average, the lowest in England – indicating a less healthy and strong economy at a given time period, suggesting fewer jobs, lower wages and less profits for businesses

Tourism accounts for around

12%
of Cornwall's GVA and...
85% 
of the Isles of Scilly economy – investment and growth rely on infrastructure development

Brexit is likely to greatly impact the import and export markets in Cornwall and the Isles of Scilly, and EU funding reliance



OVER THE LAST 10 YEARS, GROSS ANNUAL MEDIAN WAGES IN CORNWALL HAVE CONSISTENTLY BEEN AROUND 80% OF THE UK AVERAGE, CURRENTLY SITTING AT £20,352 COMPARED TO £24,897 FOR THE UK.

The Duchy's business make-up has great influence over this trend, with sole proprietors and partnerships accounting for around 48% of businesses, compared to 25% nationally - according to the Cornwall and Isles of Scilly LEP these two types of business typically have the highest levels of low pay.

Around 90% of businesses within the area are micro-businesses (with less than 9 staff), around 29%⁴⁴ of the 253,000 people employed (Cornwall and Isles of Scilly July 2018 to June 2019) work part-time, and the largest business sector in Cornwall (18%⁴⁵ of the market) is the traditionally low paying 'Wholesale, retail and motors' sector. These factors all contribute to a low-income economy. A greater

proportion of women are also often in lower paid roles in comparison to men, meaning their income potential can also be pre-determined by the 'gender pay gap'.

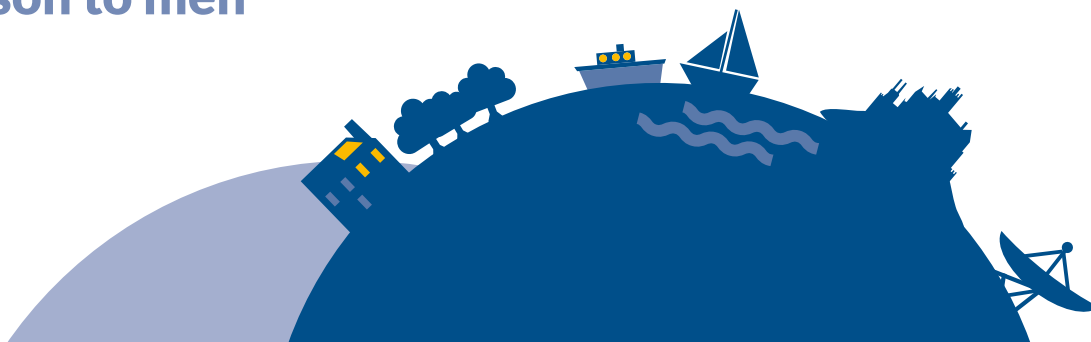
The Isles of Scilly has a similar employment make-up with the majority of people in employment (around 24%) working in the 'Accommodation and food services' sector⁴⁶ and the largest business sector being 'Hotels and catering' (20% of all local businesses)⁴⁷.

Possibly due to the Government's increase in pension ages, and the need for a reliable income to maintain standards of living, nationally increasing numbers of people are continuing to work into their late sixties. Cornwall and the Isles of Scilly saw the proportion of economically active residents 65 year olds and above increase from 6.8% to 12.1% over a 15 year period (2004-2019)⁴⁸; a higher proportion than the UK average and a likely reflection on the low wage, high cost economic factors which exist within the area.

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A greater proportion of women are also often in lower paid roles in comparison to men



THE COST OF LIVING IN CORNWALL IS HIGHER THAN IN MANY OTHER PARTS OF THE UK

with the average gross disposable household income around £17,000, 87.2%⁴⁹ of the UK average. At the end of 2018, median house prices in Cornwall equalled £220,000, £20,000 lower than the England median but around 9x the average gross annual wage (compared to 7x for England)⁵⁰. The 'Housing Affordability Gap' (an estimate of the gap between the cost of local houses and the amount residents can borrow – higher figures represent more unaffordable houses) is £62,423 in Cornwall and £121,250 in the Isles of Scilly (compared to an average of £42,272 in England)⁵¹.

The cost of housing can have a detrimental impact on the growth of the economy, particularly if it deters workers from coming to work in an area, and forces others to leave, including key workers such as teachers and hospital staff. Welfare reforms and benefits changes continue to impact the wealth and prospects of some households in the area, with affordable housing regularly featuring in the Top 10 things residents believe Cornwall Council should improve.



Source: Metro Dynamics analysis of HM Land Registry and ONS Annual Survey of Hours and Earnings (2015); CloS LEP Nov19

Welfare reforms and benefits changes continue to impact the wealth and prospects of some households in the area



THE LOCAL ECONOMY OF CORNWALL AND THE ISLES OF SCILLY IS WORTH £9.8BN

according to 2017 GVA figures⁵². The economy has grown in recent years with an average annual growth between 2012 and 2017 of 1.76%, higher than the South West region (1.69%) but lower than the UK average (2.23%). However, analysis undertaken for the **CloS LEP predicts that GVA per job (for Cornwall and Isles of Scilly) will be 60.1% of the England average by 2030** if current trends continue, although with intervention, this is predicted to reach 80% of the England average. For Cornwall and the Isles of Scilly to reach this target, the LEP estimate that the current percentage share of GVA per job against the England average needs to increase by an average of 1.02% per year⁵³.

In early 2019, Eurostat reported 2017 figures showing regional GDP per head in Cornwall and the Isles of Scilly was 68% of the EU average, the lowest in England. By comparison, GDP per head in Devon was 77%, and parts of inner London 626%. **A low GDP indicates a less healthy and strong economy at a given time period, suggesting fewer jobs, lower wages and less profits for businesses.** The continuing challenge of increasing the areas economic strength and productivity is a complex and interlinking one, involving upskilling the workforce, developing market opportunities, and investing in area wide infrastructure including transport and housing.

CORNWALL IS ONE OF THE TOP UK TOURIST DESTINATIONS, WITH TOURISM ESTIMATED TO SUPPORT ONE IN FIVE JOBS in the Duchy and projected to grow at 3.8 per cent each year through to 2025⁵⁴. The sector accounts for around 12% of the area's GVA, with an estimated 4.8 million staying trips per annum⁵⁵, and around £2bn spent by visitors every year⁵⁶. The Isles of Scilly's latest official Visitor Survey (2018) also revealed a growing trend for short breaks to the islands, with an increase of 3% in first-time visitors compared to the previous year. Tourism is the islands' main source of jobs and income – accounting for an estimated 80% of employment (over 800 jobs) and 85% of the economy (approx. £35m)⁵⁷.

Continued growth in the tourism sector, in both Cornwall and the Isles of Scilly, is heavily reliant on developments throughout the area, particularly regarding transport and connectivity.



THERE IS GREAT UNCERTAINTY AROUND WHAT BREXIT WILL MEAN FOR INDUSTRIES AND THE FUTURE GROWTH OF CORNWALL AND THE ISLES OF SCILLY.

The EU is a key export destination market for Cornwall and the Isles of Scilly, as it is more dependent on access to the EU than the UK overall⁵⁸. In 2016 55% of Cornwall's total exports (£298 million) were destined for the EU market, with 7 of Cornwall and the Isles of Scilly's 10 main export markets in the EU. Of these, Ireland

was the most important with 9.5% (£51 million) of exports, followed by France, Germany, the Netherlands, Italy, Spain and Denmark. While the importance of exports to the EU as a percentage of turnover for the 'food & live animals' sector overall is relatively low at 6.6%, for example, there is significant variance within this sector. It is estimated that of fish landed in 2017, £27.5 million or 59.5% was exported to EU countries.

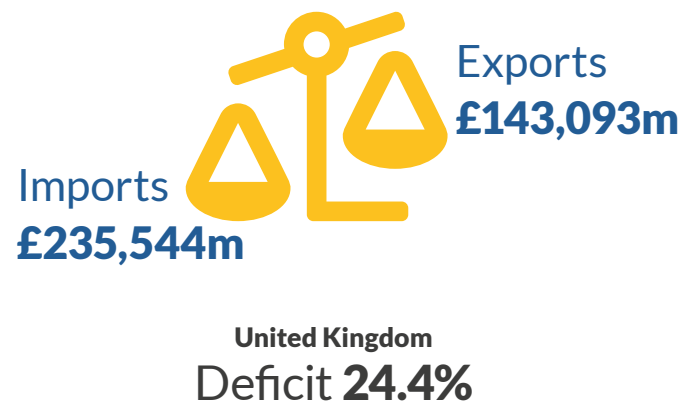
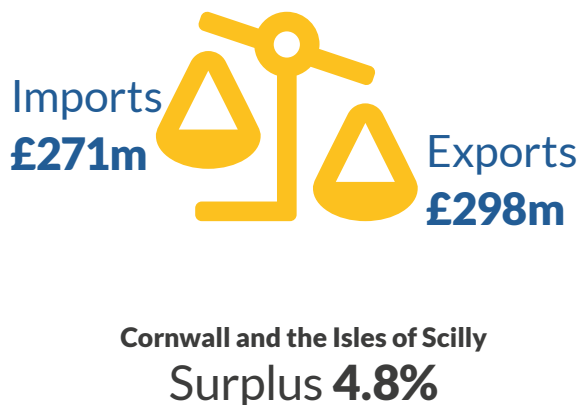
The EU is also an important import market for Cornwall and the Isles of Scilly with total imports from the EU to Cornwall and Isles of Scilly,

in 2016, worth £271 million (44% of total imports to the area). 'Food and live animals' accounted for £102 million (38%) of imports, 'Machinery & transport equipment' £57 million (21%) and 'Miscellaneous manufactured articles' £38 million (14%).

Any change to the UK/EU trade relationship that makes imports from EU countries costlier for Cornish businesses and consumers is likely to have a negative impact on Cornwall and the Isles of Scilly's economy.

Trade balance with the EU, 2016

Source: Brexit preparedness: Understanding Cornwall and the Isles of Scilly's international, Cornwall Council August 2018



UNDERSTANDING OUR TRANSPORT

COVID-19
UPDATE

Unsurprisingly, Cornwall's local roads, buses and Truro park and ride saw dramatic drops in usage during April and May 2020 due to lockdown restrictions and the instruction for most people to work from home. **To ensure services were maintained, Cornwall Council provided free car parking for health service staff, and supported ferry services throughout Cornwall.**



9% of Cornwall residents surveyed⁵⁹ said they would like to see more use of public transport as a result of the pandemic, and as lockdown eases public transport usage is likely to increase, although bus figures for July were still below those of national bus usage (27.73% v's 33%). Cycle path usage has notably increased since lockdown⁶⁰.

In August Newquay Airport reported a rise in passenger numbers since its reopening from closure in March⁶¹. Ensuring the airport and its facilities remain accessible within the Duchy is important, not just as a commercial entity, but also as a significant support to blue light services and community safety.

Nationally, research suggests working from home could become a more regular fixture for many, which may help to sustain a permanent reduction in traffic on our roads⁶². However,

at the same time, recent increases in people travelling by public transport to ease congestion, keep people healthy, and reduce climate emissions have been set back following advice during lockdown not to use public transport. The Government has spent around £3.5bn covering train company losses due to the pandemic, as rail travel decreased to just 5% of pre-pandemic levels during lockdown and is still reporting only 30-40% of levels in 2019.



The Government
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JANUARY 2020 SNAPSHOT

More than

33%



of residents in Cornwall live over 30 minutes away from a large centre of employment; residents also live on average 2 km away from their nearest GP surgery and more than half travel over 30 minutes to reach their nearest hospital

Cars are an expensive necessity rather than luxury

83%



of Cornish residents in employment travel to work by car, although over half of the cars on the road (55.6%) are over six years old

17%



of households in Cornwall and 50% in the Isles of Scilly do not have access to a car at all

Increased traffic congestion around Cornwall's larger towns is exacerbated by large visitor numbers during the summer months adding an average

25%



more traffic in August to the average daily volumes throughout the year and 57% more than January which is the quietest month

1.1%



of Cornwall employed residents use the train to get to work, compared with 10% of people nationally – reflecting that most communities in Cornwall are not served by a train station, as well as the high cost of travel

2 hrs

Frequent bus travel to smaller settlement locations is an issue in Cornwall - there are still a number of 2 hourly services and gaps in north-south provision

Cornwall Airport Newquay was the second fastest growing airport in the UK during 2017/18



CORNWALL IS A LARGE BUT SPARSELY POPULATED RURAL AUTHORITY

, consisting of small and often isolated communities, and 14 significant towns of between 9,500 and 27,400 people⁶⁴. The daily lives of many residents are framed around movement into, out of and between these larger centres for economic, health and social purposes. However, Cornwall's sparsely distributed communities, long commuting distances, heavy reliance on cars and increasing traffic congestion around the major centres of education, training and work represent significant barriers for residents.

"More road maintenance", for example, has remained at the top of Cornwall residents list of things the Council should improve in 3 consecutive residents surveys from November 2018 to November 2019⁶⁵. The area's rurality also increases the costs to business for transporting goods and raw materials, impacting economic productivity and the cost of public service provision.

Of those residents aged between 16 and 74 who are employed in Cornwall, 54% have to commute over 2 km to their place of work, whilst 41% travel over 5 km and 29% over 10 km⁶⁶. More than a third of residents also live over 30 minutes away from a large

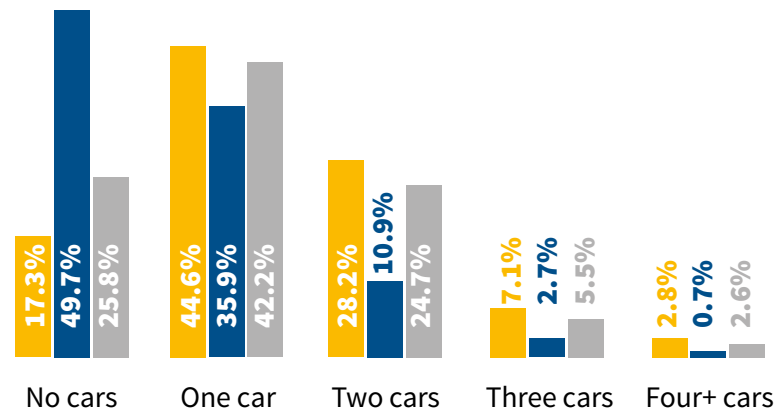
centre of employment, defined as places supporting at least 5,000 jobs⁶⁷. Cornwall residents live on average 2 km away from their nearest GP surgery and more than half would need to travel for over 30 minutes to reach their nearest hospital. A fifth of local residents would also class themselves as disabled and agree they need better access to parks, open spaces and beaches (twice the national average). Each of these examples highlights that affordable, efficient and flexible travel options are a crucial element to the area's future prosperity as well as resident's health and wellbeing.

83% of Cornwall residents in employment say that they travel to work by car⁶⁸, although over half of the cars on the road in the Duchy (55.6%) are over six years old⁶⁹. 17% of households in Cornwall do not have access to a car at all⁷⁰, further suggesting that a car may be an expensive necessity rather than a luxury item for local residents. In the Isles of Scilly this figure is 50%, perhaps reflecting the size and logistics of the islands.

Car ownership

Source: Census 2011

■ Cornwall
■ Isles of Scilly
■ England



Source: Local Insight Profile, August 2020

CORNWALL HAS THE TENTH LONGEST ROAD NETWORK IN GREAT BRITAIN

, with 435.6 km of 'A' roads and 4,174.9 km of minor roads⁷¹. Average journey times on the 'A' road network are shorter than the national average⁷², although figures mask increasing traffic congestion localised in and around many of Cornwall's larger towns, including the A30 between Penzance and Hayle, the A30, A390 and A39 in and around Truro, and the A390 out of St. Austell⁷³.

The large increase in visitor numbers to the Duchy during the summer months adds further strain to the transport and infrastructure system, both at usual congestion hotspots and also on smaller rural roads not designed for high traffic flows. National news coverage in recent years has highlighted that 'unprecedented mass tourism' has created 'traffic gridlock' and prevented emergency services from accessing many popular coastal communities within Cornwall⁷⁴.

CORNWALL ALSO HAS 128 KM OF MAINLINE RAIL THAT RUNS THROUGH THE CENTRE OF THE DUCHY

, passing through the main urban areas of St. Austell, Truro and Penzance. Five branch lines link the settlements of Falmouth and Penryn, Newquay, St Ives, Looe and Gunnislake to the mainline. However, the rail network west of Exeter has received little infrastructure investment in past years which has resulted in low line speeds and capacity limitation due to signalling restrictions.

Only 1.1% of Cornwall residents aged 16 to 74 who are in employment use the train to get to work⁷⁵, compared with 10% of people nationally⁷⁶. This could reflect the fact that 46% of Cornwall's population live in small settlements with less than 3,000 people that are unlikely to be served by a train station. Years of above inflation price rises⁷⁷ have also led to rail travel becoming comparatively more expensive, which may be a

significant issue in Cornwall where annual earnings fall below the national average⁷⁸. Despite this, the number of passenger's journeys have been increasing, from 5.78 million in 2010/11 to 7.04 million in 2018/19 and upgrades have been made to increase mainline capacity (two trains per hour in both directions) since December 2019⁷⁹.



Cornwall has...

436km 
of 'A' roads

4,175km          
of minor roads

THE NUMBER OF BUS PASSENGERS TRAVELLING ACROSS CORNWALL'S BUS NETWORK CONTINUES TO INCREASE,

from 9.6 million in 2015/16 to 11.7 million in 2018/19 but is likely being limited by the fact that only half of the network runs services that are hourly or less. Whilst high frequency 15-minute services are in place on routes from Camborne to Truro and Penryn and Falmouth to Truro, there are a number of 2 hourly services and gaps in north-south provision, causing isolation and accessibility issues particularly for vulnerable and older members of the community who may be more frequent bus users.

However, from April 2020 new subsidised bus services will be introduced across Cornwall with improved frequencies and routes, reduced fares for passengers and better links with rail services and school transport. The buses will also be more environmentally friendly. The routes will be subsidised as they are not currently commercially viable, which is the reason many previous rural routes have ceased in the past. It is hoped that subsidised travel will encourage increased uptake of services on these routes, improving their financial viability for the future. The local authority already subsidises over 50% of bus routes across Cornwall to keep communities connected and offer a viable alternative to private car use.

THE NUMBER OF OPTIONS TO TRAVEL FROM CORNWALL BY AIR ARE ALSO INCREASING.

Cornwall Airport Newquay was the second fastest growing airport in the UK during 2017/18 with 20.5% growth in passenger numbers to 465,000. The airport has seen sustained year-on-year growth in the number of destinations served, with 13 domestic and 9 international destinations available⁸⁰. A Public Service Obligation (PSO) is currently in place that guarantees regular flights between Cornwall Airport Newquay and London Gatwick; an air link which is vital for the continued economic development of Cornwall⁸¹.

Balancing residential and business transport needs with environmental and climate change impact is an increasing priority, ensuring mobility needs are met without compromising on the area's natural environment.



UNDERSTANDING DEPRIVATION

COVID-19
UPDATE

The pandemic has affected the financial wellbeing of many individuals and households in Cornwall and the Isles of Scilly, impacting their welfare and security through, for example, access to food, housing and debt concerns.

Almost two in five Cornwall residents surveyed said their income had reduced as a result of COVID-19, with more than one in ten struggling to pay bills⁸².



Food insecurity was an existing challenge in Cornwall pre pandemic⁸³, with the Trussell Trust alone distributing 16,752 3-day food parcels in Cornwall in 2018/19⁸⁴. Food banks saw a significant increase in demand across the country during lockdown, with 43% of referrals to the Trussell Trust⁸⁵ in April due to low incomes (cf. 59% in March); doubling in comparison to last year, and accounting for almost a half of the increase in referrals.

Food banks saw a significant increase in demand across the country during lockdown

Almost 3% of Cornwall residents surveyed reported that they had not always known where their next meal was coming from, or had eaten less than they needed during the pandemic⁸⁶.

In Cornwall, per pupil applications for free school meals increased by +401% in April 2020 compared to April 2019⁸⁷, and a majority of food providers reported that 50% or more of the people they were supporting were 'newly vulnerable'⁸⁸. ONS also found 47.5% of parents surveyed were unable to pay for an unexpected expense at the end of July, as more working parents reported a reduction to hours worked or being unable to work from home during the school holidays⁸⁹.

Research conducted in April showed that 7 of the 10 places in the UK with the largest increases in unemployment were coastal towns in Cornwall⁹⁰, with Penzance and St Blazey also highlighted⁹¹ as potentially being two of the hardest hit economically. Both of these towns are currently in the top 10% most deprived neighbourhoods in Cornwall⁹².

The financial pressures local residents are facing can be seen through the decline in year-on-year monthly council tax collections being made, and Cornwall Council's increasing council tax support working age caseload (+7.2% from July)⁹³.

7/10

places in the UK with the largest increases in unemployment were coastal towns in Cornwall



The risk of income and job loss can put a huge strain on a person's health and wellbeing, increasing anxiety and stress and potentially aggravating underlying health issues. Over the past few months Citizens Advice in Cornwall has seen a consistent rise in the number of new incoming issues regarding debt⁹⁴, and the ONS reported one in eight people had to borrow money or use credit more than usual at the end of July since the pandemic started⁹⁵.

The impact of the pandemic will not be experienced equally, with some communities requiring deep and concerted support to recover, including volunteering capacity to sustain new service delivery models⁹⁶. With imminent changes due when the Government's furlough scheme ends⁹⁷, uncertainty and insecurity around community and individuals' financial wellbeing remains.



In Cornwall,
per pupil applications
for free school meals
increased by

+401%

in April 2020 compared
to April 2019⁸⁷

JANUARY 2020 SNAPSHOT

Income and employment are some of the main causes of deprivation in Cornwall and the Isles of Scilly



In March 2019, around

20%

of the working age population in Cornwall were **economically inactive**



13.2%

of households in Cornwall and

12.5%



in the Isles of Scilly are estimated to be in **fuel poverty** and struggle to afford to heat their homes, compared with 10.9% across England

There are wide variations of deprivation and wealth within the area -

17

neighbourhood hotspots rank within the top

10% most deprived

of English local authorities

16%



of children are currently estimated to be living in **poverty** in Cornwall, and



1.4%

in the Isles of Scilly.

In Cornwall, the Trussell Trust reported handing out, on average,

1,340



three-day emergency food parcels each month during 2018/19

4 of Cornwall's 'most deprived' neighbourhoods ranked



1-5

in England in 2015 and 2019

WHILST CORNWALL AS A WHOLE IS NOT PARTICULARLY DEPRIVED, THERE ARE WIDE VARIATIONS BETWEEN GEOGRAPHIC AREAS, where

affluence sits alongside some of the most disadvantaged areas in England. In 2019 the Index of Multiple Deprivation (IMD⁹⁸) ranked Cornwall and the Isles of Scilly 83rd for deprivation, out of 317 English local authorities, an improvement on the 2015 ranking of 68th. Around 70,000 people (12.4% of the population) live in the 20% most ‘deprived’ communities in England⁹⁹.

There are consistent hotspots within Cornwall where residents live with a number of issues including worklessness and poverty, with 16 of the 17 neighbourhoods in the 2019 ‘top 10% most deprived’ ranking also appearing in the 2015 top 10%. Pengegon in Camborne, Treneere in Penzance, Redruth North, Close Hill, Strawberry Fields and Treleigh, Camborne College Street and the Glebe, and Camborne Town Centre all appeared within the top 5 of both rankings in 2015 and 2019.

In contrast, Duporth, Charlestown, Carlyon Bay and Tregrehan in St Austell and Mevagissey, Latchbrook South in Saltash and Torpoint, Helston Gwealhellis and Probus all remained with the ranking of between the top 20-30% least deprived neighbourhoods in England in 2019.

Cornwall IMD Rank Source: Index of Multiple Deprivation (IMD) 2019

2019	2015	NEIGHBOURHOOD (LSOA) NAME
1	4	Camborne Pengegon
2	1	Penzance Treneere
3	2	Redruth North, Close Hill, Strawberry Fields and Treleigh
4	3	Camborne College Street and the Glebe
5	6	Camborne Town Centre
326	325	Duporth, Charlestown, Carlyon Bay and Tregrehan
325	326	Latchbrook South
324	323	Helston Gwealhellis
323	321	Probus
322	318	Threemilestone East

There are consistent hotspots within Cornwall where residents live with a number of issues including worklessness and poverty,

THE 2019 IMD RANKINGS HIGHLIGHT THAT THE MAJORITY OF CORNWALL AND THE ISLES OF SCILLY'S 17 MOST DEPRIVED NEIGHBOURHOODS ARE SO DUE TO INCOME AND EMPLOYMENT.

The IMD definition of low income includes both those people that are out-of-work, and those that are in work but who have low earnings, whilst employment deprivation measures the proportion of the working age population in an area that are involuntarily excluded from the labour market, including people who would like to work but are unable to do so due to unemployment, sickness or disability, or caring responsibilities.

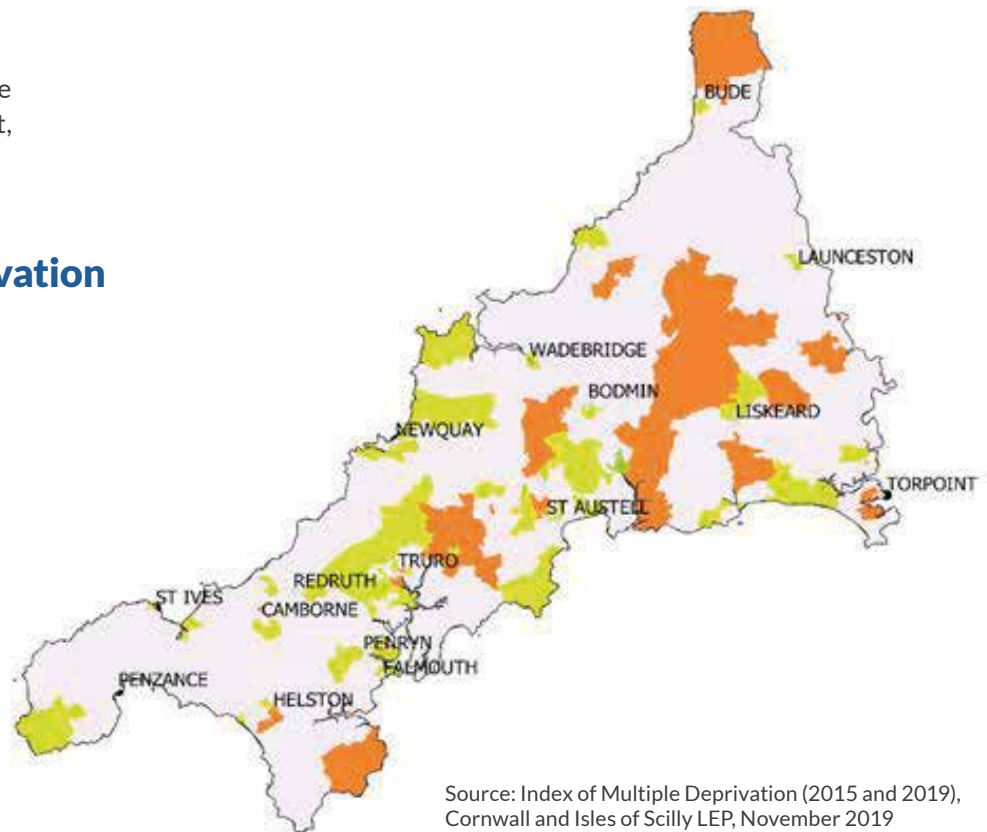
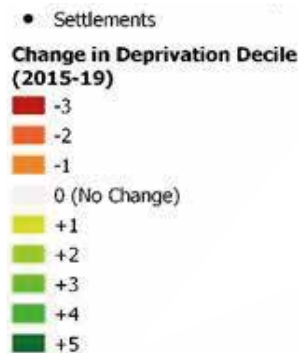
IN MARCH 2019, AROUND 20%¹⁰⁰ OF THE WORKING AGE POPULATION IN CORNWALL WERE ECONOMICALLY INACTIVE,

with the 'alternative claimant count (ACC)' rate increasing from 3.0% to 3.2%¹⁰¹ over the year to August 2019 (the alternative claimant count includes those available and searching for work). ACC rates vary across Cornwall, with the highest in Camborne and Redruth at 4.4% and the lowest in St Ives at 2.7%.

Recent research¹⁰² states that, while rates of employment have increased in the UK since 2010, work quality has not, for example the growth in insecure and unreliable zero hours contracts. The insecure nature of these contracts can potentially harm the health and wellbeing of individuals, and particularly those on low pay and low socioeconomic status.

Index of Multiple Deprivation

(Change, 2015-2019)



Source: Index of Multiple Deprivation (2015 and 2019), Cornwall and Isles of Scilly LEP, November 2019

THE SAME RESEARCH ALSO HIGHLIGHTS THAT IN-WORK POVERTY IN THE UK IS INCREASING DUE IN PART TO LOW PAID WORK, THE HIGH COST OF LIVING AND LOW LEVELS OF BENEFITS ALLOCATION.

In 2017/18, 66% of children in the UK were living in working families with one or more parents in part time work and living in poverty. 16% of children are currently estimated to be living in poverty in Cornwall and 1.4% in the Isles of Scilly¹⁰³.

Since 2010, significant changes have been made to the UK’s welfare benefit system, with around 50,000 (1 in 5) households in Cornwall having been directly impacted by the reforms and associated benefits freeze¹⁰⁴.

UC payments are paid monthly in arrears, often causing issues for tenants paying rent in advance and recipients balancing their household budgets and avoiding unmanageable debt. Cornwall Council¹⁰⁵ has analysed that around half of claimants moving to Universal Credit will be net losers in the amount of benefits they will receive, a quarter will be unaffected, and a further quarter will gain. Residents living in the existing deprived neighbourhoods in Cornwall are likely to be the most impacted by these changes.

Alternative Claimant Count

CONSTITUENCY	Aug 2018 Number	Aug 2019 Number	Aug 2018 Rate	Aug 2019 Rate
Camborne and Redruth	1549	1743	3.9	4.4
North Cornwall	1195	1316	2.9	3.2
South East Cornwall	1236	1325	3.0	3.1
St Austell and Newquay	1543	1716	3.0	3.3
St Ives	1041	1149	2.7	2.7
Truro and Falmouth	1079	1203	2.8	2.8
TOTAL	7650	8454	3.0	3.2

Source: DWP (May 2019); Economic Intelligence Labour Market Analysis, October 2019

Around 50,000 (1 in 5) households in Cornwall have been directly impacted by the welfare benefit reforms



AROUND 13,500 HOUSEHOLDS RENTING IN THE PRIVATE RENTAL SECTOR IN CORNWALL CURRENTLY RECEIVE LOCAL HOUSING ALLOWANCE (LHA/HOUSING BENEFIT).

Analysis¹⁰⁶ shows that on average two thirds of these households (around 10,000) have a gap of around £20 per week between the cost of their private rent and the maximum LHA allowance available to them since the LHA cap introduction, leaving many at risk of homelessness from struggling to pay or becoming in arrears.

ACCORDING TO NATIONAL RESEARCH THE SHARE OF SOCIAL RENTERS IN THE UK WHOSE RENT IS FULLY COVERED BY HOUSING BENEFIT HAS FALLEN FROM 70% IN 2010-12, TO JUST 52% IN 2015-17,

and those in the lowest income quintile living in the private rental sector today spend an average of 50% of their income on housing costs, even after support from housing benefit is considered¹⁰⁷.

FROM 2020 SOCIAL HOUSING PROVIDERS WILL BE FREE TO INCREASE RENTS BY UP TO

CPI+1% which may be good news for housing association revenues and support much needed building, but less positive for the living standards of social rented tenants whose rent is not fully covered by housing benefit.

Overall benefit caps, providing a maximum of £385 per week to eligible couples and families, affect around 300 households in Cornwall. It is estimated that around a fifth of these households are losing between £75-£200 a week due to the cap, with the impact particularly felt by larger families.



ACCORDING TO THE TRUSSELL TRUST¹⁰⁸, TWO-THIRDS OF PEOPLE WHO HAVE USED A FOOD BANK IN THE UK HAVE ALSO HAD PROBLEMS WITH THE BENEFITS SYSTEM IN THE PAST YEAR.

Since 2012/13, the Trussell Trust's and other organisations research has shown a significant correlation between people using food banks and the changes made to the UK welfare and benefit system, with those most likely to need a food bank including the disabled or those with a health condition, lone parents, and families with three or more children. The 'Marmot Review: 10 years on'¹⁰⁹ also states that children who grow up in food insecure homes are more likely to have poor health and worse educational outcomes compared to those in food-secure homes.

IN CORNWALL, THE TRUSSELL TRUST REPORTED HANDING OUT ON AVERAGE 1,340 THREE-DAY EMERGENCY FOOD PARCELS EACH MONTH DURING 2018/19¹¹⁰.

In addition to welfare reforms, increases in food pricing and housing costs are also cited as contributing to food poverty.

Analysis shows that the poorest 10% of households in England would need to spend around three-quarters of their disposable income on food to meet the guidelines in the NHS's Eatwell Guide. The limitation on income inevitably impacts options and therefore diet and health¹¹¹.

The poorest 10% of households in England would need to spend around

75%

of their disposable income on food to meet the NHS's Eatwell guidelines

Research has shown a significant correlation between people using food banks and the changes made to the UK welfare and benefit system

13.2% OF HOUSEHOLDS IN CORNWALL AND 12.5% IN THE ISLES OF SCILLY ARE ESTIMATED TO BE IN FUEL POVERTY AND STRUGGLE TO AFFORD TO HEAT THEIR HOMES, HIGHER THAN THE 10.9% ESTIMATED FOR ENGLAND¹¹².

7% of households in Cornwall and 26% in the Isles of Scilly are also estimated to lack central heating compared with 3% across England¹¹³.

There are known strong relationships between deprivation, poverty and a reduction in outcomes across a range of issues for children, families and adults, including education, crime and mental and physical health, hence the importance of considering all factors with a holistic view to help address the core issues arising.

There are known strong relationships between deprivation, poverty and a reduction in outcomes across a range of issues for children, families and adults, including education, crime, and mental and physical health,



UNDERSTANDING HOUSING

COVID-19
UPDATE

The issue of housing insecurity has increased for many as a result of the pandemic, with the risk of homelessness and child poverty, particularly in the private rental sector, rising due to the loss of jobs and income. **A freeze on legal evictions was introduced by the Government in the early stages of lockdown and has recently been extended by a further 4 weeks. Landlords are also now required to provide tenants with 6 months' notice until at least the end of March 2021¹¹⁴.**



However, despite this extension, risks still remain. With the introduction of changes to the current furlough scheme, and a potential increase in unemployment, a surge in homelessness is feared¹¹⁵. During lockdown Cornwall Housing saw an increase in approaches from households unable to be accommodated by friends and family, households experiencing domestic violence, relationship breakdowns and illegal evictions. It is now anticipated that an increase in assistance for those evicted from the private rented sector will also be seen over the next 9 months.

Self-employed households in Cornwall have been highlighted as a significant 'at-risk housing group' due to their high numbers (16% of people aged 16-64 in compared to 11% for the UK), their likely lower earnings compared to those of employees, and probability that jobs are in sectors negatively affected by the COVID-19 outbreak, for example hospitality.

In March¹¹⁶, 1,471 self-employed households in Cornwall were in receipt of the housing benefit element of council tax support. Of those, 266 were 'at risk' or 'in crisis', already owing a total of £46,224 in rent arrears; two thirds were in private rented accommodation; and 50 had children.

The demand for social housing in Cornwall continues to increase, with three times the usual applications made to Homechoice during August and September¹¹⁷.

Ensuring rough sleepers, accommodated during the pandemic, do not return to the streets is a main priority for Cornwall Council¹¹⁸, and has resulted in a successful bid to the Government for funding to assist with this programme of work.

The pandemic has also had a negative impact on the delivery of affordable housing in Cornwall, further complicated by the consultation of planned changes to the Planning system, including possible restrictions to affordable housing developments. Increasing housing demand, due to market reinvigoration from the 'Stamp duty holiday', is also likely to negatively impact local housing affordability. The continuing trend for increasing house prices and demand in the long term is unclear, however, as the furlough scheme ends and lenders become more risk averse as the economic impacts are felt.



JANUARY 2020 SNAPSHOT

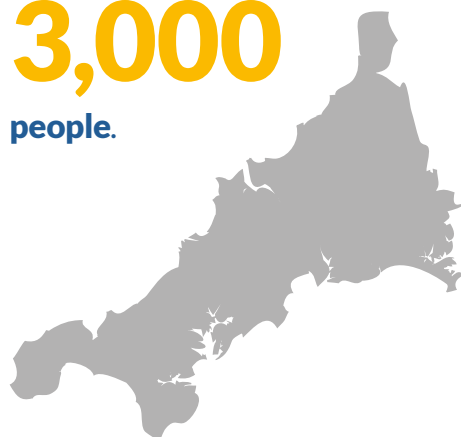
Cornwall's settlement pattern is scattered, with **few large towns and around**

46%

of the population living in settlements of fewer than

3,000

people.



The working-age population is concentrated around employment and retail towns, while older residents tend to live in coastal or affluent areas

The number of households in Cornwall is projected to continue to rise, as is the trend towards smaller average household sizes



The growth of and demographic changes to Cornwall's population are impacting the demand for numbers of and appropriate accessible housing throughout the area

Around

8,460



households currently on Cornwall Council's housing register need a home, with 'new housing' need estimated to reach around

11,500 **by 2022**

The regeneration and sustainability of communities and smaller settlements is an ongoing priority and focus in Cornwall and the Isles of Scilly

In 2018, Cornwall had the

11th



highest number of rough sleepers, of 326 local authorities in England

Between 2017-18 Cornwall Council delivered

919

new affordable homes



Cornwall Council has committed to directly delivering

1,000

new homes between 2018-22, as well as bringing empty properties back into use

CORNWALL'S SETTLEMENT PATTERN IS SCATTERED AND VARIED THROUGHOUT ITS LARGE RURAL AND COASTAL LANDSCAPE, RANGING FROM 'STRATEGICALLY SIGNIFICANT' TOWNS, TO SMALL TOWNS AND VERY SMALL VILLAGES AND HAMLETS.

The Duchy's current population density is low compared to other areas in England, at 160¹¹⁹ people per square km, with wide population dispersal: 46%¹²⁰ of the population live in key settlements of fewer than 3,000 people. Some settlements have also experienced population and housing expansion over recent years (particularly Truro and Camborne, Pool & Redruth), with further development in the pipeline.

Housing types and quality vary significantly throughout the Duchy, with an estimated 43%¹²¹ of households estimated to not be connected to the gas network, and 36% of homes in poor condition¹²². There is no mains gas on the Isles of Scilly. Around 37% of dwelling properties in Cornwall and 45.8% in the Isles of Scilly are also estimated to have been constructed prior to 1939¹²³.

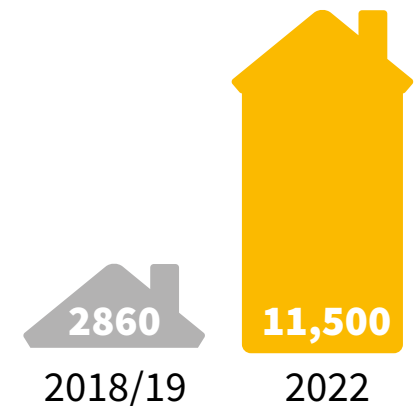
Estimates suggest that over 188,000 homes in Cornwall are owner occupied, with a further 53,000 in the private rented sector¹²⁴. High house prices, a requirement for large deposits and more stringent access to mortgage finance are likely influencing a growing rental trend in the area. Research shows, however, that the cost to the average UK family for private renting housing (gross of housing benefit) is equivalent to one-third of income – up from just 12% of income in 1980¹²⁵ – suggesting that affordability in the private rented sector is an ongoing issue.

AROUND 8,460 HOUSEHOLDS ON CORNWALL COUNCIL'S HOUSING REGISTER¹²⁶ CURRENTLY NEED A HOME,

with the annual new housing need for Cornwall calculated at around 2,860 houses (2018/19) and estimated to reach around 11,500 by 2022¹²⁷. The Cornwall Local Plan annual target for new homes is currently 2,665 per annum (10,660 over four years).

New housing need

Source: Planning & Sustainable Development, Cornwall Council

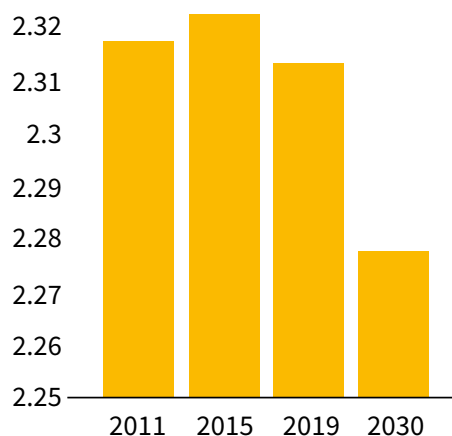


Some settlements have also experienced population and housing expansion over recent years

THE NUMBER OF HOUSEHOLDS IN CORNWALL IS PROJECTED TO CONTINUE TO RISE, REACHING 266,000 BY 2030,

with a continuation of the trend towards smaller average household size (decreasing from 2.32 persons in 2011 to 2.28 in 2030). As the population grows, but the amount of people per household decreases, demand for a wider range of accessible and appropriate housing options for a modern society will inevitably increase.

Cornwall average household size



Source: Household projections in England: 2016-based, ONS

BY 2030, 57% OF CORNWALL'S POPULATION ARE PROJECTED TO BE PEOPLE AGED 15-64 YEARS.

Historical data suggests that higher proportions of young and working age people choose to live in towns within the Duchy. For example Truro, Falmouth and Camborne, likely attracted by the amenities, retail centres and employment opportunities that these towns offer (and generally more affordable and a greater volume of housing options).

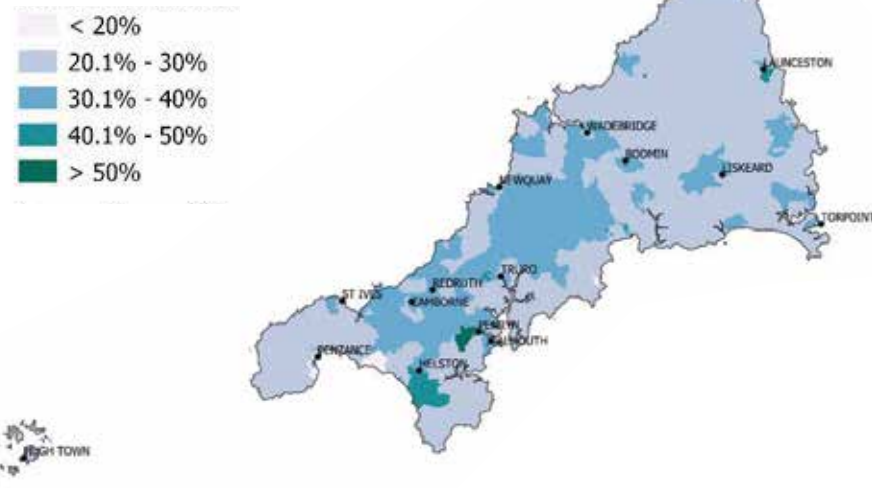
The growing private rental sector in Cornwall is currently particularly concentrated in Falmouth/Penryn (student), Newquay (tourism), Truro (health), Helston and Torpoint (defence) and, although there may currently be an economic rationale for these locations, job growth elsewhere may pose an accessibility challenge for these residents.

As the population grows, but the amount of people per household decreases, demand for a wider range of accessible and appropriate housing options for a modern society will inevitably increase.



Residents aged 0-29

Proportion per total population (2017)



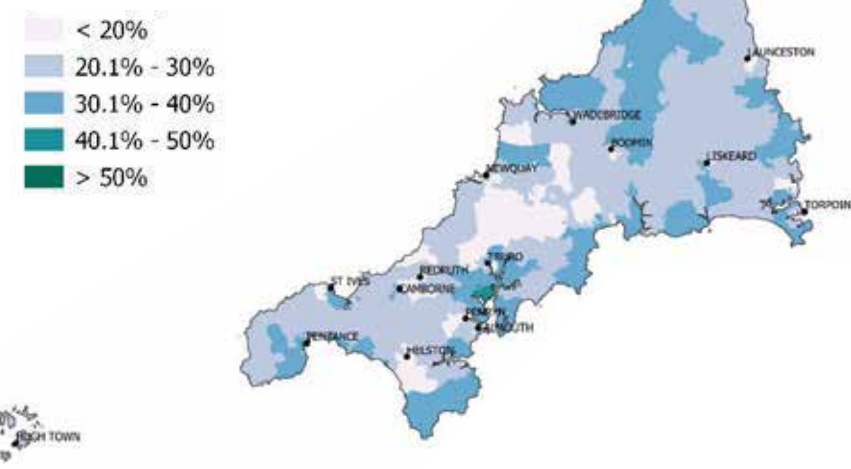
THE 65+ AGE GROUP WITHIN THE CORNISH POPULATION IS ALSO PREDICTED TO GROW,

with older people more able to afford to live in coastal or affluent areas of the Duchy. Some isolated communities, for example West Penwith or the Roseland, are projected to see a higher concentration of people in the 65+ age group compared to other areas, potentially further increasing the challenges to provide accessible and appropriate services to these more remote communities.

Demographic changes also apply to Isles of Scilly where accessibility and appropriate housing for people within the older population will be paramount.

Residents aged 65+

Proportion per total population (2017)



Source: ONS Lower Super Output Area population estimates (2018), Cornwall and Isles of Scilly LEP, November 2019

In addition to population increases and demographic changes, the demand for homes for local residents in Cornwall can be further exacerbated by challenges around second home ownership where, in some more popular holiday destinations, 30-45%¹²⁸ of houses are second homes. In addition, volumes of overall housing stock can also be reduced due to holiday home company ownership. St Ives, for example, banned the sale of new houses as second homes in 2016, with the intention to make housing more affordable for local people.

The introduction of new legislation, including the Housing and Planning Act, Welfare Reform and Work Bill, reforms to Local Housing Allowance, Universal Credit and the Immigration Bill, is increasing the demand for housing support in the area, impacting on rough sleeping and the use of temporary accommodation, and potentially having knock on effects on crime and reoffending in Cornwall, as well as increased demands on health and social care services¹²⁹.

IN 2018, CORNWALL HAD THE 11TH HIGHEST NUMBER OF ROUGH SLEEPERS OUT OF 326 LOCAL AUTHORITIES IN ENGLAND¹³⁰, ALTHOUGH THIS WAS AN IMPROVEMENT ON 2ND POSITION IN 2011.

Housing and settlement challenges are intrinsically linked with local root social and environmental factors which influence the local population's mental and physical health and provide the conditions for education and safety.

The regeneration and sustainability of communities and smaller settlements, to be centres of employment and services, and reduce the increasing demand on housing and transport in the existing significant towns within Cornwall, is an ongoing priority and focus, including balancing the need for residential housing, against providing suitable and attractive business and economic development space.

Housing and settlement challenges are intrinsically linked with local root social and environmental factors which influence the local population's mental and physical health...



UNDERSTANDING CRIME AND SAFETY

COVID-19
UPDATE

A review of the impact of COVID-19 on crime and community safety by Safer Cornwall confirms that the issues that cause the most harm have remained the same, but there have been some changes in risk profile. **The issues most affected by the lockdown were domestic abuse, drug use and Organised Crime Group activity, anti-social behaviour and community tensions and youth issues (including exploitation).**



Lockdown restrictions reduced opportunities for many types of crime to be committed, including high volume crimes such as shoplifting, burglaries and Night Time Economy violence. Overall during the three months of lockdown, all recorded crime was 14% lower than the same period last year.

The lockdown substantially escalated risk of harm, however, for adults and children experiencing or at risk of abuse in the home (and confined with their abuser). This was of national concern, with one domestic abuse helpline seeing a 120% increase in calls seeking support¹³¹.

LOCALLY THE PRE-EXISTING RISING TREND IN DOMESTIC ABUSE REPORTED TO THE POLICE SLOWED DOWN, and there was a fall in referrals and helpline queries to commissioned services. The proportion of cases assessed by the police as high risk increased but not consistently over the period. Arrest rates increased and police and partners prioritised fast response and early engagement to get the best outcomes for victims. Since the easing of restrictions in July, referrals to services have rapidly climbed above pre-COVID levels as those who had experienced abuse hidden in lockdown come forward for support. The extended period without being able to access help has also caused needs to become more complex, requiring more intensive support.

Lockdown also heightened risks for people with a drug or alcohol dependency, due to changes in access to services including key worker support, needle exchange and pharmacy services for prescriptions. This was particularly challenging for

those who were not in secure housing. Availability of street drugs changed, and an influx of dangerous counterfeit drugs (which resulted in local and national drug alerts), alongside intensified Organised Crime Group activity has been seen.

Anti-social behaviour reports to the police increased by over a third during the lockdown period, with a two-fold rise in nuisance neighbour reports. Tensions have run high in communities with increased hostility towards various groups, including people who are homeless and/or being supported in the community, visitors and the student population. Around 15% of incidents recorded during lockdown were COVID-specific and the impact of this has dropped off since July. There is a residual rising trend in levels of anti-social behaviour, however, as an increase in more complex cases and challenging cases, involving multiple individuals, persistent offending and the need to respond to a dynamic profile of risk and multiple vulnerabilities is continuing to be seen.

Anti-social behaviour reports to the police increased by over a third during the lockdown period

THERE ARE SPECIFIC CONCERNS ABOUT HEIGHTENED RISKS FOR YOUNG PEOPLE IN CORNWALL,

particularly related to the deterioration in mental health in children and young people and in families. Restrictions on social and learning activity have resulted in more 'living online' and increased exposure to cyber bullying and other online risks. Young people are presenting to services with increased complexity of needs, such as those linked to poly-drug use and violence in the home (both as victim and abuser).

Across Cornwall, as lockdown is lifted many of towns are experiencing increased levels of anti-social behaviour and problems with street drinking and drugs, including more crack cocaine use and vulnerable people being exploited by Organised Crime Groups. This surge in demand across multiple towns places a significant pressure upon services, particularly those providing outreach and support services.

Over the longer term, the social and economic consequences of the crisis will result in greater poverty and hardship for individuals, families and communities that are already vulnerable or disadvantaged. Disproportionate family impacts include domestic abuse, drug and alcohol problems, family breakdown, missing children, youth offending, serious violence and gang associations; community impacts include rises in shoplifting and other thefts, on-line frauds, black market sales, drug crime and violence.

Young people

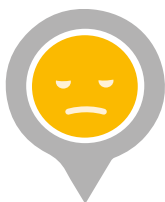
are presenting to services with increased complexity of needs, such as those linked to poly-drug use and violence in the home



JANUARY 2020 SNAPSHOT



Compared to national rates, Cornwall has low levels of crime, although local rates have appeared to increase due to improved reporting



The number of hate crimes reported in Cornwall has increased since 2016 -

escalating concerns over the impact of 'Brexit' on community cohesion and tolerance



55% of all recorded crime in Cornwall took place in an urban area. The highest rates were recorded in Liskeard and Newquay

The underlying factors of poor health - poverty, vulnerability, previous experience of crime, unemployment and low levels of education - **also increase the risk of crime**

An estimated

8,000

children in Cornwall live in **families where there is domestic violence**



Around

10%

more crimes and



21%

more anti-social behaviour incidents are recorded during the summer months in Cornwall, when tourist numbers swell the population

The number of domestic abuse crimes reported to police increased by

24%



in Cornwall in 2018/19

Crack cocaine use has escalated in Cornwall

- increasing users' chances of serious health harms and the risk of violence and exploitation amongst the most vulnerable populations, including children and young people



Organised drug trafficking activity, particularly along county lines, continues

The number of people seeking help for complex needs in the area is growing - the root of problems is often linked to violence, abuse and neglect experienced in childhood.

CORNWALL IS A SAFE PLACE IN WHICH TO LIVE AND WORK, WITH LOW CRIME COMPARED WITH NATIONAL RATES AND OTHER SIMILAR PARTNERSHIP AREAS ACROSS THE COUNTRY.

Devon and Cornwall Police, along with other forces across England and Wales, is recording much higher levels of crimes than in previous years. Mirroring national trends, recorded crime has risen by 38% over the last three years, with the main factor being action taken by the police to improve crime recording standards¹³². The impact of this has now plateaued, with a 3% increase in the last year.

The police recorded 29,432 crimes in Cornwall in 2018/19, equating to a rate of 52.4 crimes per 1000 population, 21% lower than the average rate for the Duchy's most similar community safety partnership areas (66.7 crimes per 1000). Only 75 crimes were recorded in the Isles of Scilly between December 2018 and November 2019¹³³.

Nationally, recording improvements have focused on violence and sexual offences, having the greatest impact on crime numbers. More public order incidents are now crimed rather than being recorded as anti-social behaviour. There is also a continued drive to increase reporting rates for hidden harm areas such as sexual violence, exploitation and domestic abuse, and improve victim confidence in the support available. The number of domestic abuse crimes in Cornwall reported to police increased by 24% in 2018/19, further to similar rises in previous years. Rates of violence with injury offences, predominately related to domestic abuse and alcohol-related violence, are also higher than most similar community partnership areas.

Although numbers remain low (less than 1% of all recorded crimes), the number of hate crimes reported in Cornwall has increased over the year, with escalating concerns over the impact of 'brexit' on community cohesion and tolerance.

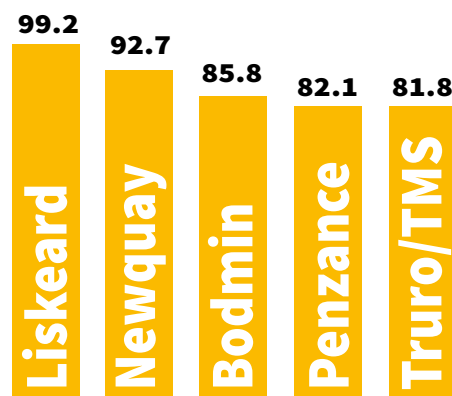
Links between violence and organised crime groups and gangs are less clear for the Duchy, with rates of crimes where knives and firearms are used significantly lower than other areas nationally. Intelligence about knife crime linked to organised crime groups and gangs suggests there are isolated problems in specific areas. Organised drug trafficking activity, particularly along county lines, continues and due to proactive police targeting, increases in drug-related crime and possession of weapons offences are being seen in Cornwall.

Although numbers remain low (less than 1% of all recorded crimes), the number of hate crimes reported in Cornwall has increased over the year

Only **75**
crimes were recorded in
the Isles of Scilly between
December 2018 and
November 2019

The use of crack cocaine has escalated in Cornwall, with the increased availability and affordability of the drug, especially amongst those who already use heroin. Drug use not only increases the chances of serious health harms (for example relating to injecting) to users, but also the risk of violence and exploitation amongst the most vulnerable populations including children and young people.

Crimes per 1,000 population: Top 5 towns



Source: Safer Cornwall
Strategic Assessment 2018/19

55% OF ALL RECORDED CRIME IN CORNWALL IN 2018/19 TOOK PLACE IN AN URBAN AREA (population 10k or above), with the highest rates recorded in Liskeard (99.2 Crimes per 1,000 population) and Newquay (92.7 Crimes per 1,000 population).

TOURIST NUMBERS SWELL THE LOCAL POPULATION SIGNIFICANTLY DURING THE SUMMER MONTHS, particularly in the popular seaside towns like Newquay, and whilst tourism is a major contributor to the economy, it also brings with it extra risks in keeping people safe. An estimated 10% more crimes and 21% more anti-social behaviour incidents are recorded in Cornwall per month over the summer.

Community safety is about helping communities to be and feel safe, covering a broad spectrum of crime and disorder from low level nuisance and vandalism at one end of the scale to serious violence, rape and murder at the other. It also includes tackling the, often complex and costly, harms of problem drinking, drug use, domestic abuse, reducing reoffending and delivering a robust strategy to prevent violent extremism in local communities.

The underlying factors of poor health are the same factors that increase the risk of crime - poverty, vulnerability, previous experience of crime, unemployment and low education levels

SAFER CORNWALL

Kernow Salwa

THE SAFER CORNWALL PARTNERSHIP HAS REPORTED THAT THE NUMBER OF PEOPLE SEEKING HELP FOR COMPLEX NEEDS IS GROWING IN THE AREA.

Complex needs commonly include drug or alcohol problems, criminal or anti-social behaviour, mental and physical health problems, learning difficulties, poor family and other relationships, poverty and debt. The root of these problems is often linked to violence, abuse and neglect experienced in childhood (described as Adverse Childhood Experiences or ACEs), with research into the reoffending of young people in Cornwall highlighting that

young people with 4 or more ACEs were more likely to reoffend and be charged with a higher number of re-offences than their peers.

An estimated 8,000 children in Cornwall live in families where there is domestic violence¹³⁴. Addressing social challenges around deprivation, housing and health (for example timely mental health support) are recognised as priority areas to help those most at risk. The underlying factors of poor health are the same factors that increase risk of crime (both for victims and offenders) – poverty, vulnerability, previous experience of crime, unemployment and low education levels¹³⁵.

UNDERSTANDING HEALTH AND WELLBEING

COVID-19
UPDATE

The increase in demand placed on the care, NHS and health services due to the pandemic has resulted in significant additional pressure placed on delivery, resources and budgets, both locally and nationally¹³⁶.

As at end September, the Government reported 1,326 cases of coronavirus in Cornwall and Isles of Scilly, and 210 total deaths¹³⁷. 64.9% of deaths were male, compared to 35.1% female, with the majority taking place in hospitals (122) and care homes (70). As with national trends, older people have experienced the highest number of deaths from COVID-19, with 89.16% in Cornwall and the Isles of Scilly being over 65 years age.

COVID-19 cases in the UK are rising¹³⁸, with tighter national restrictions and local lockdowns being put in place to help combat the spread of the virus and hopefully avoid a full-scale national lockdown which would further damage people's wellbeing and livelihoods. The Government's Track and Trace app¹³⁹ has also been launched to inform people to self-isolate if they have been near someone later found to have COVID-19.

Locally, attention is focused on planning for the autumn and winter period, with Cornwall Council, the NHS and local health partners working together to deliver a large scale flu vaccination programme to support the ongoing management of COVID-19¹⁴⁰.

Anxiety levels among the overall population have continued to increase throughout the pandemic, with the most vulnerable in society, such as disabled adults, those with a health condition and those who feel unsafe outside the home because of the pandemic, experiencing the greatest levels of stress¹⁴¹.

OVER TWO IN FIVE CORNISH RESIDENTS SURVEYED SAID THEIR WELLBEING HAD BEEN ADVERSELY AFFECTED DUE TO THE PANDEMIC

, with a fifth also stating that they had been drinking more alcohol than usual¹⁴². National research now also shows a direct link between obesity and the risk of dying from COVID-19, further highlighting the importance of addressing underlying long term health inequalities that exist within the population¹⁴³.

In addition to physical wellbeing, there is also concern that the pandemic will further impact the mental health wellbeing of individuals, including risk factors associated with suicide. Local mental health services expect referrals to significantly increase during the autumn and winter months as service provision 'returns to normal', and suicide prevention work in Cornwall is adapting to respond to need, for example through free to access online suicide prevention training.

Cornwall Council has a dedicated webpage for COVID-19 data for Cornwall and the Isles of Scilly:

www.cornwall.gov.uk/health-and-social-care/public-health-cornwall/information-about-coronavirus-covid-19/covid-19-data-for-cornwall-and-the-isles-of-scilly

JANUARY 2020 SNAPSHOT

Men living in less deprived areas of Cornwall **can expect to live**

6.2 years

longer than men living in more deprived areas

Men in Cornwall are likely to spend more of their lives in poor health,

16.8

years compared to the England average of 16.2 years



1 in 10

Cornwall residents say their day to day activities are **limited a lot due to a long-term health problem or being disabled**

29.9%

of Year 6 children in Cornwall and the Isles of Scilly are **classified as overweight or obese** - below the national average of 34.3%



69.9%

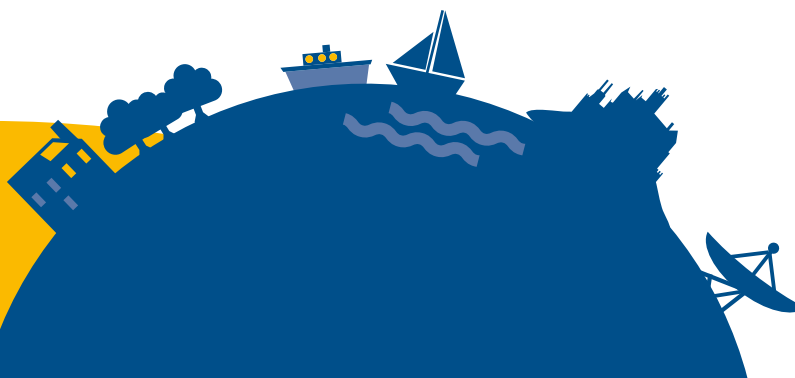
of adults in Cornwall were classified as overweight or obese in 2014, and this continues to be an issue



Suicide rates in Cornwall are amongst the highest in England.

14.3

between 2016-18, compared to the England average of 9.63 in the same period



BETTER HEALTH IS CENTRAL TO HUMAN HAPPINESS AND WELL-BEING. IT ALSO MAKES AN IMPORTANT CONTRIBUTION TO ECONOMIC PROGRESS,

as healthy populations live longer, are more productive, and save more. There are many factors that impact an individual's health, including housing, financial security, community safety, employment, education and the environment.

According to recent research, "... health is a good measure of social and economic progress. When a society is flourishing health tends to flourish. When a society has large social and economic inequalities there are large inequalities in health."¹⁴⁴

Nationally, the population's life expectancy is increasing as higher living standards, advances in healthcare and initiatives put in place by Public Health continue to progress. However, this is not a pattern seen everywhere and widespread inequality still exists.

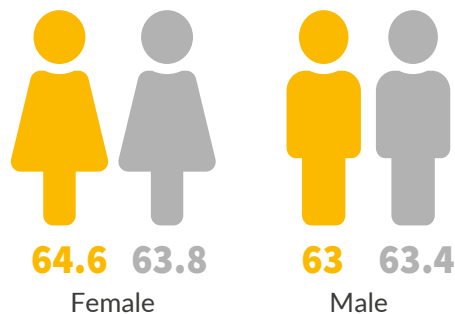
As a result, those living in the most deprived circumstances in the UK are likely to experience poorer health up to 20 years in advance of those living in less deprived areas. Demographic, technological and disease pattern changes also contribute to an increase in the numbers of patients presenting with complex health conditions, impacting the accessibility of services within a community.

The 'Marmot Review: 10 years on' highlights that since 2010 increases in life expectancy have slowed in England, with the slowdown greatest in more deprived areas. Inequalities in life expectancy have increased, particularly for women, as have the expected years of ill health for people in England living in more deprived areas¹⁴⁵.

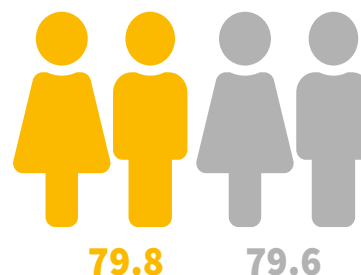
The average life expectancy of males in Cornwall is 79.8 years and females 83.3 years (compared to 79.6 years and 83.1 years for England respectively), however males in Cornwall have a lower healthy life expectancy (63

years) and lower disability-free life expectancy (62.2 years) than the national average (63.4 years and 63.1 years respectively).¹⁴⁶ These figures suggest that males in Cornwall are likely to spend 16.8 years of their lives in poor health. By contrast, healthy life expectancy in females in Cornwall is higher than the England average (64.6 years compared to 63.8 years), however, due to their life span, they are likely to spend 18.7 years in poor health. Female healthy life expectancy in Cornwall is also lower than the South West average of 65.1 years, and the lowest of all counties in the region.

Cornwall healthy life expectancy (Age - years)



Cornwall life expectancy (Age - years)



Source: Health state life expectancy at birth and at age 65 years by local areas, UK, ONS December 2019

THE DUCHY'S INEQUALITY GAP IN LIFE EXPECTANCY (AT BIRTH) IS ALSO CONTINUING TO WIDEN

, with the variation between life expectancy and deprivation increasing from 4.3 years for both men and women (2010-2012)¹⁴⁷, to 6.2 years for men and 4.5 for women (2016-2018) i.e. men living in less deprived areas in Cornwall are likely to live 6.2 years longer than men living in more deprived areas. An aging population, mixed with persistent detrimental factors, including substandard housing and low income, presents significant challenges to improving the health and life expectancy of individuals in Cornwall.

According to the Indices of Multiple Deprivation 2019, Cornwall's most deprived neighbourhood is Camborne Pengegon and least deprived neighbourhood is Duporth, Charlestown, Carlyon Bay and Tregrehan. An illustrative comparison between life expectancy and healthy life expectancy of the two areas is shown¹⁴⁸:

Local life expectancy comparison - male

AREA	Life expectancy	Healthy life expectancy	Years of poor health
Camborne Pengegon	77.7 years	59.8	17.9 years
Duporth, Charlestown, Carlyon Bay and Tregrehan	82.9 years	67.0	15.9 years
DIFFERENCE	5.2 years	7.2 years	2 years

Local life expectancy comparison - female

AREA	Life expectancy	Healthy life expectancy	Years of poor health
Camborne Pengegon	82.9 years	62.1 years	20.8 years
Duporth, Charlestown, Carlyon Bay and Tregrehan	90.4 years	69.3 years	21.1 years
DIFFERENCE	7.5 years	7.2 years	0.3 years

Source: Life Expectancy (LE) and Healthy Life Expectancy (HLE) at Birth by Sex for Middle Layer Super Output Areas (MSOAs) in England, 2009 to 2013, ONS

Men living in less deprived areas in Cornwall are likely to live 6.2 years longer than men living in more deprived areas



According to Public Health England, 'currently, too many people spend a significant proportion of their later life in poor health, or managing a disability which could have been prevented, and there are huge inequalities in healthy and disability-free life expectancy across the country. These years spent in ill health are not inevitable, and many of the factors that cause people to age differently can be prevented or the impact mitigated through public health interventions.'¹⁴⁹

In Cornwall, 1 in 10 residents say their day to day activities are limited a lot due to a long-term health problem or being disabled¹⁵⁰, with 21.4% of the population identifying their health as limiting their day to day activities, compared to an average of 17.6% across England. In the Isles of Scilly this figure is 14%.¹⁵¹

The causes of lower life expectancy and particularly healthy life expectancy can be driven by lifestyle factors and economic circumstances¹⁵²:

- **Smoking** – areas with higher number of smokers generally have a lower healthy life expectancy. People living in the most deprived areas of England were more than four times more likely to smoke in 2016¹⁵³.
- **Harmful drinking behaviour** – alcohol-related hospital admissions reflect the underlying harmful drinking behaviour of an area.

Alcohol specific death rates are highest in the most deprived areas (30.1 deaths per 100,000 people for men and 13.5 for women), and lowest in the least deprived areas (7.0 deaths per 100,000 people for men and 4.0 for women)¹⁵⁴.

- **Healthy eating and exercise** – areas with a greater percentage of healthy eaters have a higher healthy life expectancy as well as those areas with higher levels of physical activity. The prevalence of eating less than the recommended intake of fruits and vegetables was higher in the most deprived areas of England, compared to the England average (47.7%), as was the prevalence of inactivity (England average 28.7%)¹⁵⁵.

However, recent research argues “there is evidence to reject the twin notions that people are poor because they make poor choices, and that the poor health of the poor results from poor choices. Rather, it is poverty that leads to unhealthy choices and the poor health of those lower down the social hierarchy results from the restricted range of options available to those on low incomes, as well as the direct health impacts associated with the stresses and poor conditions which result from poverty. As an illustration, the poor diet of people in poverty is, very largely, the result of poverty, not poor choices¹⁵⁶.”



THE IMPACT OF POOR DIETS PUTS PRESSURE ON HEALTH AND SOCIAL CARE SERVICES,

with almost half¹⁵⁷ of coronary heart disease and a third of cancer deaths¹⁵⁸ in the UK attributed to poor eating habits. Prevalence of overweight or obesity amongst year 6 children in Cornwall and Isles of Scilly is lower than the national average with 29.9% of children being classified as overweight or obese compared to 30.3% in the South West and 34.3% in England. The number of 5-year olds in Cornwall, classified as overweight or obese (25.3%), however remains higher than the national average of 22.5%.¹⁵⁹

Obesity is also a continuing issue amongst adults in Cornwall, with 69.9% of adults being classified as overweight or obese in 2014 compared to the national average of 64.6%.¹⁶⁰. Cornwall Council's Healthy Weight Strategy aims to tackle these issues by

delivering against the following three themes: Healthy weight environment; Support for people to achieve and maintain a healthy weight; Working with professionals and partners to promote a healthy weight.

The issue of mental health wellness has gained prominence over recent years, with a greater recognition of the combination of complicated factors that may impact a person, including social isolation, poverty and ill-health. Unemployment, job insecurity, unmanageable debt and lack of support services are factors that contribute to suicide and are more likely to occur in the most deprived areas of communities¹⁶¹.

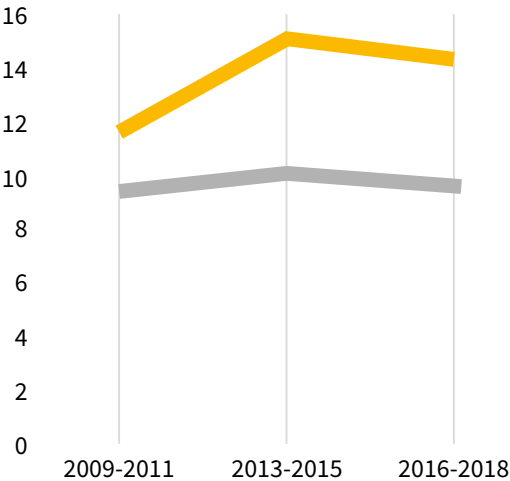
Suicide rates in Cornwall are amongst the highest in England, reaching 14.3 in the period 2016-18 compared to an England rate of 9.6¹⁶², with men at greatest and increasing risk.

Parallel thinking and understanding around the complex links between the social, environmental and economic factors that make up Cornwall and the Isles of Scilly will help address the current inequality of health and wellbeing within the area.

Suicide rate comparison

- Cornwall
- England comparison

Source: Suicide by Local Authority 2018, ONS

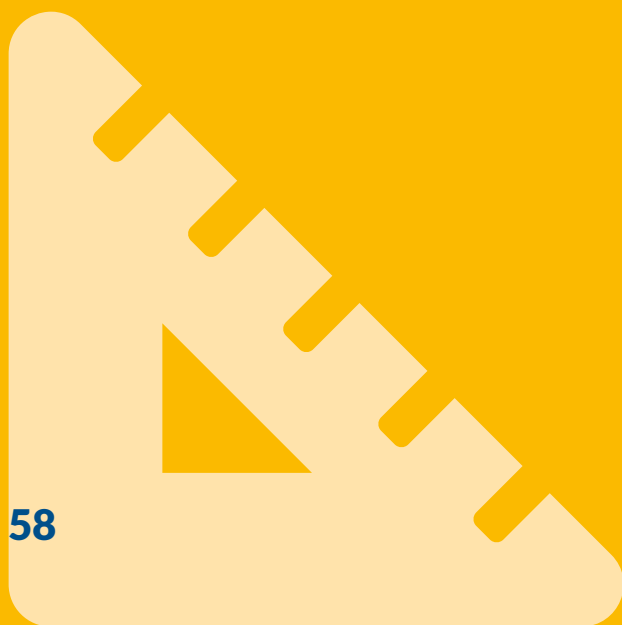




UNDERSTANDING EDUCATION

COVID-19
UPDATE

Although the mortality risk of COVID-19 is very low for the 0-19 age group (less than 0.1% of deaths in England hospitals), young people have been directly negatively impacted by lockdown measures put in place, with the closure of schools, increase in financial precarity faced by many families due to business closure and new unemployment, and anxiety and wellbeing risks relating to isolation.



Large numbers of pupils being home schooled and accessing remote education has had a significant impact on children's and young people's safety, education, and health and wellbeing, for example vulnerable children, children with SEND needs, digital exclusion, and those experiencing and/or witnessing domestic abuse¹⁶³.

LOSS OF ACCESS TO SUPPORT CONTACTS, SERVICES AND CLUBS HAS INCREASED ISOLATION AND RISK FOR MANY,

with a spike in children social care and safeguarding referrals expected as lockdown restrictions continue to be lifted and incidents of 'hidden harm' emerge.

The underdevelopment of very young children's social and learning skills may also become apparent as the impact of long periods of isolation during their informative years is seen.

Recent research suggests the learning gap between disadvantaged and wealthier pupils in England has widened as a result of the pandemic, with the average learning lost for 'all pupils' estimated at 3 months, but at 4 months or more for over half of pupils in the most deprived areas¹⁶⁴.

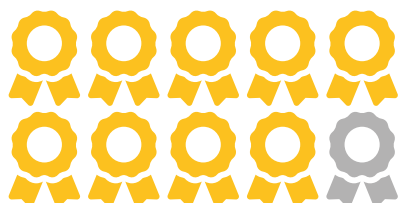
Particular concerns have also been raised about the wellbeing of those who have been affected by the delay and changes to exams and grades. Uncertainty around, and expected increased competition for university places next year, as well as examination plans¹⁶⁵ and fair grading considering the loss of education due to the pandemic, are all contributing to continued pressures and anxiety for younger people.

A focus on retaining talent within Cornwall and developing young people's work skills may be more pertinent than ever as more people defer university entry or find themselves looking for employment. Linking schools and young people to the opportunities that are available within the local workplace, and matching skills development with sectors in need, for example care and construction.



A focus on retaining talent within Cornwall and developing young people's work skills may be more pertinent than ever

JANUARY 2020 SNAPSHOT



Over

90%

of early years, primary and secondary schools in Cornwall are rated Good or Outstanding by Ofsted

Living in poverty, ill health (either their own or their parents/carers), **having parents with low qualifications and living in a family with low income** are all factors which are known to directly impact a child's

opportunities
to do well at school

In 2018/19

19.6%



of Key Stage 4 disadvantaged pupils in Cornwall attained Grade 9-5 in GCSE Maths and English compared to 20.2% for the South West and 24.8% nationally

Positive

early years education is key to a child's personal and academic journey and life-long opportunities



Around

7%



of Cornwall's adult population (aged 16-64 years) have no qualifications, and around 35% have achieved an NVQ4 or above, below the national average of 39% - a skilled workforce is key to helping develop and drive growth within the local economy

POSITIVELY SUPPORTING A CHILD'S PERSONAL AND ACADEMIC DEVELOPMENT

not only helps improve their own wellbeing and outcomes later in life, but also helps meet skills gaps, and enhance innovation and creativity in the economy and environment in which we live.

“Experiences and the ability to thrive and develop well during the early stages of childhood relate closely to outcomes in a wide range of areas, including health, throughout the rest of life”¹⁶⁶.



Around 73,000 children¹⁶⁷ in Cornwall attend state nursery, primary and secondary schools, with over 90% of early years, primary and secondary schools judged Good or Outstanding by Ofsted¹⁶⁸. A recent survey¹⁶⁹ also found Cornish schools to be 5th best in the country for SEND provision.

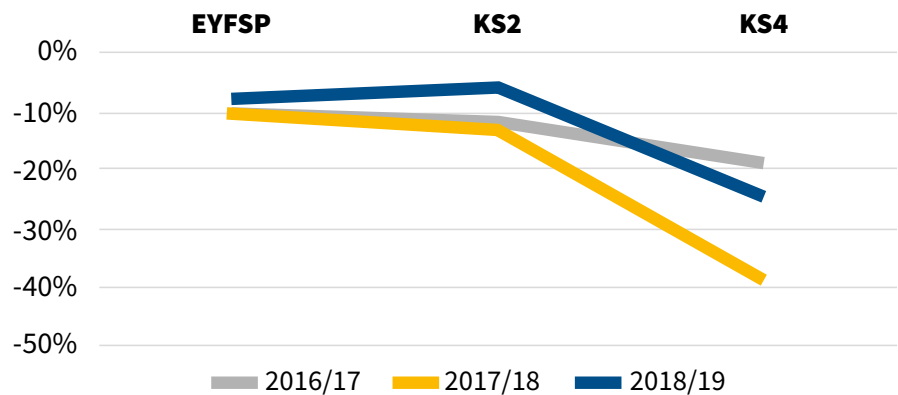
Figures show, however, that Cornwall's disadvantaged pupils in particular need enhanced support throughout their academic journey as outcomes for each

stage of pupil testing, from early years to Key Stage 4, have been consistently below national averages.

The graph shows 2016/17 and 2018/19 percentage differences between Cornwall and national average results, at each test stage for disadvantaged pupils, from early years through to Key Stage 4 GCSE's. Although these figures will be for different cohorts of pupils, they show a general decline against national average outcomes.

Difference vs National Results

Source: Department for Education, Key stage 4 performance, 2019 (revised)



2018/19 GCSE: Key Stage 4 Maths and English: 9-5 Results

	% All Pupils	% Disadvantaged Pupils
England	43	25
Cornwall	39	20
Isles of Scilly	43	33

Source: Department for Education, Key stage 4 performance, 2019 (revised)

IN 2018/19 19.6% OF KEY STAGE 4 DISADVANTAGED PUPILS IN CORNWALL ATTAINED GRADE 9-5 IN GCSE MATHS AND ENGLISH compared to 24.8% nationally. In the Isles of Scilly, the figures were more positive at 33.3%¹⁷⁰.

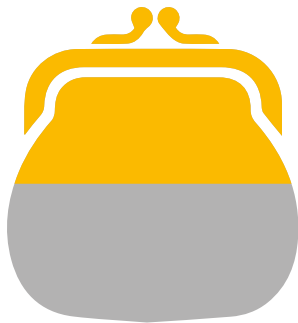
While Cornwall has a lower number of disadvantaged children overall (23%) compared to the national average (27%) (as defined by the Department of Education, and registered by schools for KS4 2019), the Duchy has areas of high deprivation where communities, and all children within schools, may be more challenged by external factors that impact their academic outcomes.

Living in poverty, ill health (either their own or their parents/carers), having parents with low or no qualifications and living in a family with low income are all factors which are known to directly impact a child's opportunities to do well at school.

Data indicates there are almost 47,000 low income households in Cornwall with 23,530 children, almost half of which are below the poverty line (12,600 children)¹⁷¹.

In September 2010, the Department for Education introduced an entitlement to 15 hours of free childcare per week for all 3 and 4 year olds in England. In 2013, this was extended to include 2 year olds from disadvantaged families. In 2017 a tax-free childcare scheme for working parents of children under 4 and disabled children under 17 (up to a maximum of £2,000 per year) was launched alongside an increase to 30 hours per week of the entitlement to free childcare for children who are 3 or 4 years old (parents must be working to take advantage of this). This was thought to be worth around £5,000 per year to families.

There are almost
47,000
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23,530
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poverty line



It is estimated¹⁷² that around 97% of 3 to 4 year olds in Cornwall currently take up free early years education, however disadvantaged 2 year old children are low in numbers. A number of barriers have already been identified, including access to online facilities to confirm provision, and an understanding of the importance of education, with a particular focus on speech and language, in these formative years.

Further considerations and challenges to early years education provision also include the availability of quality childcare, for example ensuring suitable local service provision is available when developing housing schemes and developing and maintaining a sustainable workforce for early years providers (including

pay and qualifications). The 'Marmot Review – 10 years on' highlights that “a large proportion of childcare workers still struggle financially and are on low rates of pay – earning around 40 per cent less than the average female worker”¹⁷³.

In addition to developing children's academic progress, around 7% of Cornwall's adult population (aged 16-64 years) have no qualifications¹⁷⁴, and around 35% have achieved an NVQ4 or above, below the national average of 39%. Difficulty in recruiting (the correctly) skilled workforce is a common issue faced by local businesses, with increasing and retaining the pool of young talented people within the area being a key economic growth objective.

Focusing on improving the education and learning opportunities of all residents within Cornwall will not only impact individual's opportunities and health and wellbeing but also those of society and the economy generally.



UNDERSTANDING OUR ENVIRONMENT

COVID-19
UPDATE

When asked what one thing people would like to see changed once the pandemic is over, most residents of Cornwall said a cleaner environment, closer communities and reduced traffic¹⁷⁵. **Natural England's People and Nature Survey for England also showed that almost half the population (46%) were spending more time outside than before COVID-19, and 42% of adults reported that nature and wildlife was more important than ever to their wellbeing¹⁷⁶.**



A number of positive changes arose as a result of lockdown, particularly with regard to impacts on the environment.

Local levels of air pollution (NO₂ concentrations) in Cornwall significantly dropped throughout monitoring sites during lockdown as traffic levels reduced and more people took to walking and cycling.



A NUMBER OF PLANS HAVE ALSO RECENTLY BEEN REVEALED TO FURTHER ENCOURAGE USE AND DEVELOPMENT OF THE LOCAL ENVIRONMENT, as well

as supporting local businesses and the visitor economy, for example a Cornish Cycle Hub¹⁷⁷, modifications to Penzance's traffic flows and pedestrianisation¹⁷⁸ and investment to improve The Mount's Bay area¹⁷⁹.

The pandemic meant that Cornwall Council's grounds maintenance of urban verges was held back, resulting in a flush of native wild flora, drawing in insects and other wildlife. As a result, and in keeping with its aim to create a greener Cornwall, Cornwall Council has developed a new verge-cutting policy in towns and villages, to encourage wildflowers and pollinators to thrive and allow more natural growth without compromising road safety, for example cutting verges after flowers have finished and seeds are set¹⁸⁰.

Despite challenges posed by lockdown, construction on Cornwall's

first smart grid-connected wind turbine continued, with the supply of renewable energy to over 1,400 Cornish homes per year planned to begin from September¹⁸¹.

With the majority of their workforce working from home since late March, Cornwall Council have seen a dramatic reduction in their use of paper since April, with an estimated saving of over 5.5m pages of copy and print. The Council has also continued to see a fall in the overall volume of waste produced by households (approx. 2,000 tonnes), as well as an increase in the amount of waste recycled and composted (approximately 1,000 tonnes)¹⁸². However, there has been significant pressure on the kerbside collection service as a result of the changes in behaviour following the Covid-19 outbreak e.g. changing from working in an office environment to working at home. These changes have resulted in an increase of over 12,000 tonnes additional waste collected at the kerbside, with the garden waste collection service increasing by over 30%, putting considerable pressure on collection crews and staff.

The pandemic meant that Cornwall Council's grounds maintenance of urban verges was held back, resulting in a flush of native wild flora, drawing in insects and other wildlife

JANUARY 2020 SNAPSHOT



Cornwall Council declared a climate emergency in January 2019, committing to achieving carbon neutral status by

2030



28,000

houses in Cornwall are currently at risk from flooding or being impacted by coastal change – sea levels around Cornwall and the Isles of Scilly are rising

Cornwall and the Isles of Scilly has a strong clean energy sector and advantageous geography for wind, solar and geothermal energy production

Wetter, stormier winters and hotter drier summers, predicted as a result of

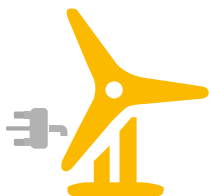
climate change

will directly impact many areas including biodiversity, water resources, infrastructure, health, tourism and agriculture

The agri-tech sector contributes

£1.5bn

to Cornwall's economy and accounts for around 6% of GVA - agriculture is also responsible for 10% of greenhouse gas emissions



Transport and housing represent approximately

60%

of carbon emissions

with transport emissions alone amounting to **27%** of total emissions in 2017

Whole house retrofits, bringing Cornwall's existing social homes as near to

zero carbon



as possible, are within the Council's plans – building zero carbon council homes would also reduce householder energy consumption costs

There are also concerns regarding the forthcoming winter months, and seasonal severe weather warnings and local flooding risks that may coincide with an increase in COVID-19 cases, adding further pressure to emergency services and response.

The real impact of the pandemic on the environment is likely to be seen longer term, with the hope that the current trend in falling carbon emissions and the return of wildlife to certain areas will continue and be sustainable.

THE ENVIRONMENT IS A KEY FACTOR IN OUR HEALTH, ECONOMY AND, PARTICULARLY IN CORNWALL AND THE ISLES OF SCILLY, SENSE OF PLACE AND IDENTITY.

Addressing societal and climate change is vital to creating a sustainable environment for current and future generations¹⁸³.

Cornwall's environment provides essential resources which enhance and enrich all our lives. It supports our physical and mental wellbeing and supplies us with products such as timber, minerals, medicine and textiles. Our cultural history was built on our environment, with mining, farming and fishing driving the trading relationships that characterises the Cornish Culture¹⁸⁴.

Cornwall's environment provides essential resources which enhance and enrich all our lives



CHANGES IN CLIMATE HAVE IMPLICATIONS FOR ALL ELEMENTS OF LIFE IN CORNWALL.

As an extreme Atlantic coastal area, Cornwall currently has a generally temperate maritime climate. Wetter, stormier winters and hotter drier summers, predicted as a result of climate change, will directly impact many areas including biodiversity, water resources, infrastructure, health, tourism and agriculture. Increased rainfall, stronger more frequent storms and rises in sea level are significant issues that are even now highlighting Cornwall's and the Isles of Scilly's vulnerability as a particularly exposed peninsula.

Cornwall's 400+ miles of coastline are particularly at risk from changes resulting from climate change, with 28,000 houses estimated to be at risk from flooding or impacted by coastal change¹⁸⁵. According to the Environment Agency¹⁸⁶ urban areas in Cornwall including Flushing, Penryn, St Mawes, Truro and Tresillian are particularly at risk from flooding from tidal water, however local rivers and surface water are also a cause for concern.

The Duchy's significant ecological legacy from the industrial revolution, intensive farming practices and monoculture developments, present additional challenges to future sustainability ambitions.

The agri-tech sector currently contributes an estimated £1.5bn to Cornwall's economy and accounts for around 6% of GVA¹⁸⁷. At least 74% of land in Cornwall is farmed and there are over 3,000 agricultural holdings with 50% being registered as dairy holdings¹⁸⁸. The future of the areas agriculture industry is intrinsically intertwined with climate change, with

farming activities directly dependent on the changing climate. Agriculture is responsible for 20% of greenhouse gas emissions, however it also contributes to the mitigation of emissions by sequestering carbon while maintaining food production.¹⁸⁹

Cornwall Council maintains over 4,500 miles of roads within Cornwall which vary from major roads to narrow country lanes. Within Cornwall, transport and housing represent approximately 47% of carbon emissions, with transport emissions alone amounting to 26% of total emissions in 2017¹⁹⁰.



CORNWALL AND THE ISLES OF SCILLY HAS A STRONG CLEAN ENERGY SECTOR AND ADVANTAGEOUS GEOGRAPHY FOR WIND, SOLAR AND GEOTHERMAL ENERGY PRODUCTION.

This has encouraged new explorations, such as the recently proposed £16m geothermal plant at the Eden Project, which will make the site carbon neutral by 2023 and provide power to the local area.

In Cornwall, the total electricity generated by renewables in 2018 (data published in September 2019)¹⁹¹ was 773mw (mega watts), with proposals for an additional 71mw. In addition, a further 55mw was generated for heat, with an additional 58mw permitted¹⁹².

Quality of life in Cornwall is reliant upon a healthy and accessible environment and by improving the quality and productivity of our environment, we will have a stronger foundation to grow our economy and make Cornwall a better place to be¹⁹³.

Cornwall Council's most recent residents survey shows that the percentage of residents who agree that the Council is making the area cleaner, greener and a better place to

live continues to increase¹⁹⁴, however figures show only 12.3% of Cornwall's population utilise the outdoors for exercise or health reasons¹⁹⁵.

The built and natural environment are directly linked to the health of an area's population and, therefore the strength of its society and economy. Poor air quality, for example, harms health including raising risks of mortality and morbidity¹⁹⁶. In Cornwall there are nine Air Quality Management Areas (AQMAs) where air pollution is higher than the national targets. The primary contributing factor for poor air quality in these areas is an excess of Nitrogen Dioxide (NO₂) caused by vehicle emissions.

Reducing the reliance on vehicle transport in Cornwall's large and sparsely populated landscape is a challenge. In order to address climate change and environmental impacts, we will need to collectively consume less, and the way we manage our land will need to change to absorb more carbon dioxide. There will be a need to build in longer-term perspectives on how we build homes that are more thermally efficient, not build on flood plains and design roads and transport infrastructure that is climate resilient.



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