
South Lakeland Local Plan – Annual Monitoring Report April 2019 to March 2020

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Foreword

Welcome to South Lakeland's 2019-2020 Local Plan Annual Monitoring Report.

South Lakeland is the Local Planning Authority for South Lakeland District outside the Yorkshire Dales and Lake District National Parks. Although this only represents around a third of the area of the District, it contains about three quarters of the District's population and is the area where most development is likely to take place.

The Local Plan Monitoring Report sets out the latest information on key social, environmental and economic characteristics and trends affecting South Lakeland District. These are the issues which South Lakeland is seeking to address through the Local Plan. It tells you of our progress in preparing, adopting and implementing the documents that form part of, or support the Local Plan for South Lakeland (outside the National Parks). The report also contains the annual report of income and expenditure relating to the Community Infrastructure Levy (CIL).

Significant progress has been made in recent years and South Lakeland District Council has an adopted Local Plan comprising of four development plan documents. These include the Core Strategy and a Land Allocations documents that set out where new housing and employment development can take place up to 2025, and two new Local Plan documents that were adopted in March 2019, containing development management policies for the district, and a Local Plan for the Arncliffe and Silverdale Area of Outstanding Natural Beauty. The Council has also commenced a review of its Local Plan documents. Following a period of early engagement in 2020, the Council will be consulting on an Issues and Options report in summer 2021.

We hope that you find the document interesting and informative; it helps to demonstrate that South Lakeland District Council is on track to making South Lakeland the best place to live, work and explore.

Strategy Team
South Lakeland District Council

Comments welcome!

We welcome any comments you may have on this document and its implications, as well as any useful information or data you may hold. Although this document will not go out for public consultation, any comments or information we receive will contribute to improving future Annual Monitoring Reports. Please send your comments to development.plans@southlakeland.gov.uk.

This Annual Monitoring Report can be found on the Council's [Local Plan evidence and monitoring web page](https://www.southlakeland.gov.uk/planning-and-building/south-lakeland-local-plan/evidence-studies-and-reports/#annualmon)¹

¹ <https://www.southlakeland.gov.uk/planning-and-building/south-lakeland-local-plan/evidence-studies-and-reports/#annualmon>

Executive Summary

Introduction

This is the sixteenth Monitoring Report for the South Lakeland Local Plan. It provides information for the year 1 April 2019 to 31 March 2020 and is important because it:

- Paints a picture of the district's key social, environmental and economic characteristics and issues. This helps provide a sound basis for developing and improving Local Plan policies and monitoring their impact over the longer term;
- Provides an update on the preparation of our Local Plan documents;
- Sets out a framework for monitoring our adopted Local Plan policies and our Community Infrastructure Levy to tell us whether they are working and what difference they are making to the district.

Key Characteristics and Issues in South Lakeland

Key characteristics and issues that need to be taken account of in planning for the future of the district, and that the Local Plan seeks to address include:

- High average house prices, and affordability issues.
- High quality natural and built environment.
- A rich local heritage and distinctive landscape and settlement character.
- Pressures in the rural areas such as lack of public transport, local facilities and services.
- A reliance on private car travel.
- Higher than average life expectancy and low levels of crime.
- A super-ageing population.
- High economic activity rate and a relatively low unemployment rate, but a reliance on lower wage service and tourism sectors.²
- Increasing risks from climate change including flood risk.

Progress on the preparation of Local Plan documents

The Council's timescale for preparing its Local Plan documents is set out in its Local Development Scheme, the most recent version being that published in October 2018, which is now in need of updating. The Council's progress in the last year on preparing Local Plan documents is summarised below and explained fully in Section 3.

² As at March 2020

Local Plan Document	Progress
Local Plan Review	Early Engagement commenced 2019-20

Key findings and messages for 2019/20

Employment

- An additional 4,426.4 square metres (net gain) of employment floorspace have been created for business uses. This is significantly more than last year's comparable completions figure of 1,065.4 square metres. Most of the net gain in floorspace was due to two planning applications.
- Unemployment levels have increased from 0.9% to 1.10%³.
- The proportion of working age people in employment has fallen a little from 82.9% in 2018/19 down to 82.1% for 2019/20.
- 2,225.6 square metres of employment floorspace has been lost to other uses: with 715 square metres of that being lost to housing and 1,511 square metres to gyms (D2 land use class).
- There are 54.913 hectares of available employment land. This is a very slight increase from the 2018/2019 comparable figure of 54.78 hectares. The amount of available land in the Strategic and Business/Science Park market sectors remains unchanged.

Housing

- The population of the district (including national parks) has increased from 104,532 to 105,088.
- Permission was granted for 477 (net) dwellings in 2019/20, with 367 of these dwellings on sites allocated for housing in the Local Plan.
- 53% of the dwellings granted permission in 2019/20 were in the principal service centres of Kendal and Ulverston.
- 88% of new homes permitted in 2019/20 were on greenfield sites.
- Housing affordability has worsened. The median house price to workplace earnings ratio in South Lakeland increased from 8.34 in 2018 to 9.49 in 2019.
- 223 homes (net) were built in the district in 2019/20. 55% of these homes were in Kendal or Ulverston.

³ Based on the claimant count (which is a monthly count from administrative records of those claiming Jobs Seeker's Allowance plus those claiming Universal Credit who are required to seek work) is the most accurate measure of unemployment locally. These rates are calculated as % of the whole working age population not the economically active population as is the case for the Office of National Statistics (ONS) model-based count.

- 25% of homes built in 2019/20 were on brownfield land.
- 34 affordable homes were built in 2019/20.

Environment and conservation

- One air quality monitoring site (Lowther St, Kendal) continues to exceed air quality objectives for nitrogen dioxide, but only by a small margin.
- The number of heritage assets on Historic England's 'at risk' register has reduced slightly, from 16 to 15. A partnership scheme has commenced with Historic England and the Parish Council for the Burton-in-Kendal Conservation Area to facilitate a range of public realm improvements and repairs to historic buildings, with the aim of the conservation area being removed from the at risk register.

Town centres/retail

- The proportion of empty shops in town centres has increased from 8.06% to 9.86%.
- There was no net completions (losses or gains) of town centre uses floorspace within the town centres.
- There was a net gain of 1,202 square metres of town centre uses floorspace completed outside of town centres.

Infrastructure Delivery Plan (IDP) and Community Infrastructure Levy (CIL)

- In 2019/20, CIL Receipts amounted to £778,228.26
- £153,951.67 was paid to Parish and Town Councils.
- £0 was spent on strategic infrastructure projects.

1. Introduction

1.1 Purpose of document – what is the Monitoring Report for?

- 1.1.1 South Lakeland is the Local Planning Authority for South Lakeland District outside the Lake District and Yorkshire Dales National Park. This means that it is responsible for preparing the Local Plan and for determining planning applications within this area.

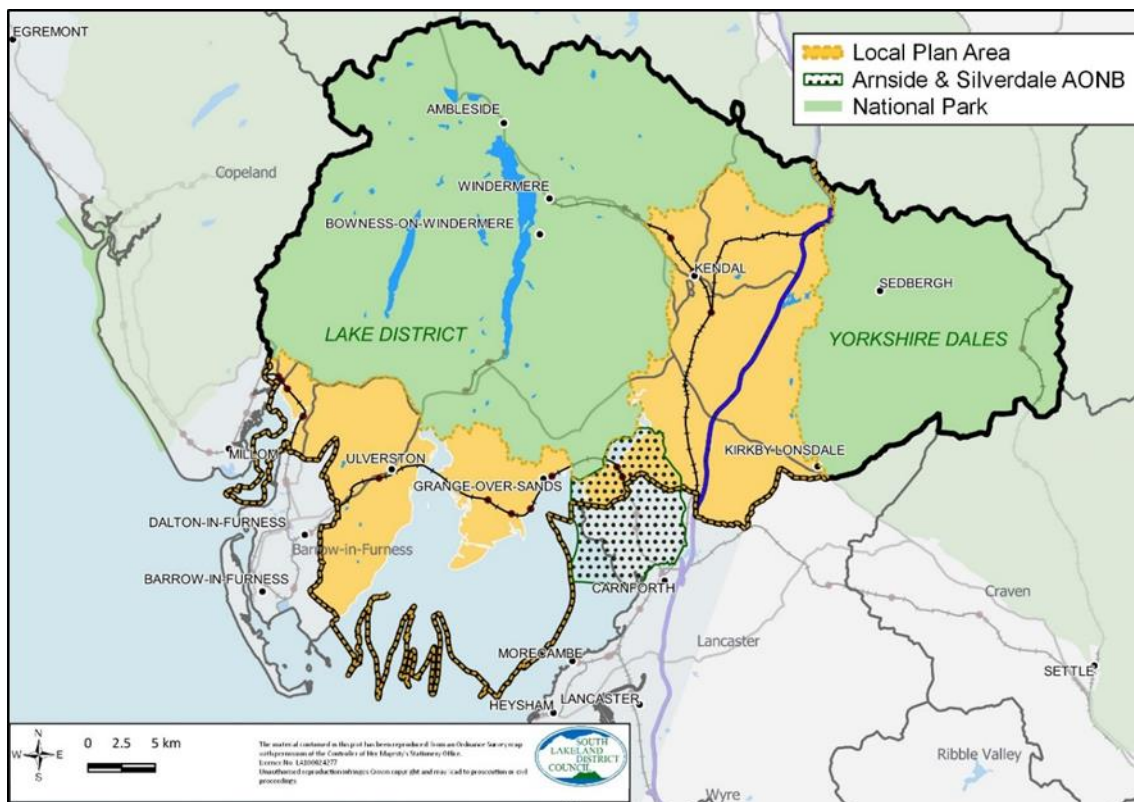


Figure 1 - Map: Location of South Lakeland

- 1.1.2 National planning guidance and legislation⁴ require local planning authorities to prepare a monitoring report, at least annually, and to make it publicly available. This is the sixteenth Monitoring Report for the South Lakeland Local Plan. It covers the year from 1 April 2019 to 31 March 2020. The purpose of the Monitoring Report is to:
- show communities how the preparation and implementation of policies in the Local Plan is progressing and what impacts the policies are having;
 - report any activity relating to the duty to cooperate;

⁴ Section 35 of the Planning and Compulsory Purchase Act 2004

- provide up-to-date information on the implementation of any neighbourhood plans that have been made;
- report on progress in implementing and spending of the Community Infrastructure Levy (CIL) and;
- guide the preparation of new/updated policies, including a review of the Local Plan.

South Lakeland Local Plan

- 1.1.3 At 31st March 2020 South Lakeland's adopted Local Plan consists of the:
- Local Plan Part 1 – the Core Strategy (adopted in October 2010);
 - Local Plan Part 2 - Land Allocations (adopted in December 2013);
 - Local Plan Part 3 – Development Management Policies DPD (adopted March 2019); and
 - Local Plan Part 4 – Arnsdale and Silverdale Area of Outstanding Natural Beauty DPD (adopted March 2019).
- 1.1.4 Saved policies from the old South Lakeland Local Plan (adopted in 1997 and altered in 2006)⁵ ceased to be part of the development plan for the district on 28th March 2019 when the Development Management Policies DPD and the Arnsdale and Silverdale AONB DPDs were adopted.
- 1.1.5 The Council introduced a Community Infrastructure Levy with effect from 1 June 2015.
- 1.1.6 The Minerals and Waste Local Plan prepared by Cumbria County Council as Minerals and Waste planning authority is also part of the Local Plan. The Minerals and Waste plan is reported upon separately by the County Council and is not considered in this report. Similarly for parts of the District within National Parks, the relevant National Park authority is responsible for preparing a Local Plan and monitoring it.

An Introduction to South Lakeland

- 1.1.7 South Lakeland is the second largest district in the county of Cumbria, covering an area of 1,545km². Kendal and Ulverston are the two Key Service Centres in the District (designated Principal Service Centres in the Local Plan), with populations of 33,931 and 13,321 respectively in 2019. Together with a number of smaller service centres and traditional market towns, these urban areas and town fringe settlements are home to the majority of the district's population.
- 1.1.8 South Lakeland's key characteristics are described in the AMR by a set of contextual indicators in the data tables in Section 3. These illustrate the current state of the

⁵ Appendix 2 of the Core Strategy DPD, and Appendix 3 of the Land Allocations DPD specify which old saved Local Plan policies were superseded by the DPDs.

district and set a baseline from which monitoring and policy making can take place. Whilst some data relates to the South Lakeland planning area, much of the data relates to the whole of South Lakeland district, including the National Park areas. This is because much of the data required for indicators is available only at whole district level. A brief high level summary of some of the main characteristics of South Lakeland is provided below and the data underpinning these points can be found in Section 3.

Economy

- 1.1.9 South Lakeland has a **high economic activity rate** and a relatively **low unemployment rate, although the latter has increased** from 0.9% to 1.10% (claimant based) for 2019/2020. It has a higher than average reliance on the low-waged service and tourism sectors. **Tourism, especially in the Lake District and Yorkshire Dales National Park areas, is a major driver of the district's economy.** In catering for visitors, the district must balance the economic benefits and the quality of the visitors' experience with ensuring that the high quality natural and cultural heritage of the area is not compromised by or for the visitors themselves.
- 1.1.10 The **east of the district in particular benefits from good accessibility** to main national transport links, meaning that larger regional centres and some major ports and airports are within reasonable driving and rail journey distance of Kendal. A fast service on the West Coast Main Line enables passengers to get to central London from Oxenholme Station in under 2½ hours. The A590 and Furness rail line provide access for communities in the west of the district. Reasonable levels of local bus service are provided for parts of towns and larger villages but there is significantly less (and recently reduced) provision in more rural areas, and little or no evening or Sunday bus service, even in areas of the main towns.

Housing

- 1.1.11 Average **house prices in the district are significantly higher** than the Cumbrian average and well beyond the financial reach of a large proportion of local people. The district has a **high house price to household income ratio**. South Lakeland is a popular place to retire to or in which to own a second home.

Environment

- 1.1.12 South Lakeland has a **high quality natural and built environment**. South Lakeland contains large areas of land designated for their local, national or international biodiversity, geodiversity or landscape importance. The area supports a number of rare and protected plant and animal species and habitats. Additionally, there are currently 10 Conservation Areas and over 1,200 listed buildings and 60 scheduled monuments in the SLDC planning area.

Health and Wellbeing

- 1.1.13 An overall **good quality of life** in South Lakeland may have contributed to **higher than average life expectancy**. South Lakeland has **low levels of crime** and is a comparably safe district to live in.
- 1.1.14 The district has a range of **good quality cultural, leisure and recreational facilities**, sports facilities, formal and informal publically accessible open spaces, canal and river corridors and historic parks and gardens.

1.2 Structure of the Monitoring Report

- 1.2.1 The Monitoring report is split into a number of sections as outlined below:

Section 2: Local Development Scheme – progress check

- 1.2.2 The timetables and milestones for preparing South Lakeland's Local Plan documents are set out in the Local Development Scheme (LDS). The first LDS was prepared in 2005 and has been reviewed a number of times since, most recently in February 2018 and October 2018, and is in need of a further update. Section 2 of this AMR records progress towards achieving the milestones in the latest LDS and also sets out any revisions considered necessary to the timetable and related resource issues.

Section 3: Monitoring policy implementation and impacts

- 1.2.3 Section 3 sets out a framework for monitoring the policies of the Development Plan for South Lakeland outside the National Parks prepared by South Lakeland District Council. It sets this out clearly in tables by policy topic area and uses key indicators, including those identified as being important at a Corporate, County and National level.
- 1.2.4 Indicators and their associated data not only demonstrate the position of the district during a given monitoring period, but also illustrate the effects of policies over time and help to identify trends and key issues in the district.

Section 4: Monitoring Implementation of the Community Infrastructure Levy and Infrastructure Delivery Plan

- 1.2.5 Section 4 monitors and reports on the implementation of CIL (including CIL spending) and other financial contributions generated from development. It also provides an update on the delivery of infrastructure to support the Local Plan.

Section 5: Duty to co-operate and joint working

- 1.2.6 Section 5 looks at how we work with other organisations in preparing and implementing our Local Plan and activities we have undertaken in relation to the duty to co-operate.

Section 6: Looking Ahead - Local Plan Review, Future Evidence, Monitoring and Resources

- 1.2.7 Section 6 looks ahead to the review of our Local Plan and future requirements for evidence base preparation and monitoring.

2. Local Development Scheme – Progress Check

2.1 Introduction

- 2.1.1 A key role of the AMR is to review progress on the delivery of the Local Plan against the timetable and milestones set out in the Local Development Scheme (LDS). The LDS is the project plan for the preparation of the South Lakeland Local Plan. It details the documents that the Council has produced or will produce, with a timetable for the preparation of each document. Until a single Local Plan is prepared, the Local Plan will comprise of a series of documents referred to collectively as the South Lakeland Local Plan.
- 2.1.2 Performance has been assessed against the timetable in the approved October 2018 LDS which can be viewed on the Council's [website](#)⁶. The LDS is in need of updating to reflect the revised timescales for the Local Plan Review.

2.2 Progress 1 April 2019 to 31 March 2020

Development Plan Documents

- 2.2.1 The most recently adopted Development Plan Documents (DPDs) were the Arnside and Silverdale AONB Local Plan and the South Lakeland Development Management Policies DPD, both of which were adopted in March 2019 in accordance with the LDS.

Local Plan Review

- 2.2.2 Early evidence base and project planning work has begun on a single combined Local Plan, which the October 2018 LDS identifies will be adopted by December 2021. The timetable is currently being reviewed and an updated LDS will be published in due course.

Key stages	2018-21 LDS	Actual
Early preparation and consultation	Evidence base from 2017	Early Engagement activities undertaken in 2020 including a launch event and consultation on a discussion paper. Details can be found on the Local Plan Review webpage ⁷ . Work is progressing

⁶ <https://www.southlakeland.gov.uk/planning-and-building/south-lakeland-local-plan/local-development-scheme-lds/>

⁷ www.southlakeland.gov.uk/LocalPlanReview

Key stages	2018-21 LDS	Actual
		on evidence base preparation and an Issues and Options report which will be publicly consulted on in summer 2021.
Formal publication	January 2021	Not yet commenced.
Submission to the Secretary of State	May 2021	Not yet commenced.
Adoption by Full Council	December 2021	Not yet commenced.

Supplementary Planning Documents

- 2.2.3 No supplementary planning documents were adopted in the monitoring year 2019/20.
- 2.2.4 There are currently no plans to begin preparation of a Development Brief for Land East of Burton Road, Kendal, which was originally identified as Phase 3B development brief SPD.
- 2.2.5 The following SPDs are listed in the Local Development Scheme.

Housing SPD

Key stages	2018-21 LDS	Actual
Preparation and Issues Consultation	Commence early 2019	Early scoping work commenced but is on hold as work is focussed on the Local Plan Review.
Consult on Draft SPD	2019	Not yet commenced.
Adoption by Cabinet	March 2020	Not yet commenced.

Design SPD

Key stages	2018-21 LDS	Actual
Preparation and Issues Consultation	Commence early 2019	Not yet commenced
Consult on Draft SPD	2019	Not yet commenced.
Adoption by Cabinet	December 2020	Not yet commenced.

Burton-in-Kendal Village Design Statement SPD

- 2.2.6 The October 2018 update to the 2018-21 Local Development Scheme introduced a new Supplementary Planning Document, which will support the current PSiCA (Partnership Scheme in Conservation Areas) project being undertaken in the Burton-in-Kendal, by providing detailed guidance on the design of new development in the village.

Key stages	2018-21 LDS	Actual
Preparation and Issues Consultation	Commence October 2018	Project is underway and consultants have been appointed.
Consult on Draft SPD	March 2019	Formal consultation on draft SPD has not yet commenced, but some early community engagement on an early draft document took place in Summer 2019.
Adoption by Cabinet	October 2019	Not yet commenced.

Other SPDs not listed in Local Development Scheme

- 2.2.7 An additional two SPDs are being produced that are not currently listed in the Local Development Scheme. These are Conservation Area Management Plan SPDs for Cartmel and Burton-in Kendal Conservation Areas. Both are currently at early draft stages.

Neighbourhood Plans

Allithwaite and Cartmel Neighbourhood Plan

- 2.2.8 Allithwaite and Cartmel Neighbourhood Area⁸ was designated in February 2015 and the adopted LDS indicates that early preparation and consultation would take place in 2015-17, but does not define the timescales beyond this. Early work has been undertaken on a draft Plan and an early public consultation was carried out by the Parish Council Plan Steering Group in September 2019. A consultation on the submission version of the plan is anticipated in 2021.

⁸ <https://www.southlakeland.gov.uk/planning-and-building/south-lakeland-local-plan/neighbourhood-plans/allithwaite-and-cartmel-neighbourhood-plan/>

Burneside Neighbourhood Plan

- 2.2.9 Burneside Neighbourhood Area⁹ was designated in June 2016, and a slightly revised neighbourhood area covering the full extent of the two parishes was formally designated in September 2020. The adopted LDS does not identify a timetable for its preparation. The Parish Council's Steering Group made progress in preparing a Neighbourhood Plan in 2016/17, including an Objectives Report and SEA/HRA Screening Report, however, the Parish is revisiting the Plan and no further progress has been made.

Statement of Community Involvement

- 2.2.10 The Statement of Community Involvement (SCI) sets out the Council's approach to engaging with communities in the preparation of the Local Plan and in decisions on planning applications. Whilst the Local Development Scheme did not consider a short term review of the SCI to be necessary, recent developments in the Council's Customer Connect digital transformation project together with the 2018 Neighbourhood Planning Regulations gave rise to the need for the SCI to be updated in spring 2018. A revised SCI was adopted by the Council on 10 October 2018 and the Neighbourhood Planning Protocol which forms Appendix 2 of the SCI was subsequently updated in June 2020.

⁹ <https://www.southlakeland.gov.uk/planning-and-building/south-lakeland-local-plan/neighbourhood-plans/burneside-neighbourhood-plan/>

3. Monitoring policy implementation and impacts

3.1 Introduction

- 3.1.1 A key role for the AMR is to identify the extent to which policies in the Local Plan are being implemented, how successfully and what impact this is having.

3.2 Core Strategy

- 3.2.1 The monitoring of the Core Strategy focuses on its five main themes of the economy, housing, environment, accessibility and health and wellbeing. A monitoring framework is included in Appendix 1 of the Core Strategy. The indicators presented in the tables in section 3.4 of this AMR are taken from both Corporate and County Council indicator sets and reflect the Core Strategy's objectives (see pages 11-13 of the Core Strategy) as well as the wider Council targets and ambitions as set out in the Council Plan and other Council documents.

3.3 Land Allocations DPD

- 3.3.1 Monitoring of the Land Allocations DPD relates primarily to the monitoring of the implementation of allocated sites, including progression of planning applications and the preparation of Development Briefs.

Housing sites

- 3.3.2 There are 62 sites solely allocated for residential use in the Land Allocations DPD. Progress on the implementation of these is summarised below and further information on the progress of each site can be found in the Council's Housing Land Annual Position Statement published on its website. The monitoring data in the table below covers the 2019/20 monitoring year but real time updates are also provided up to February 2021 where the position has changed in that period. Progress on mixed use sites (housing/employment), is given in paragraph 3.3.13.

Allocation Site	No. dwellings (Gross)	Status at end March 2020
West of High Sparrowmire, Kendal	150	Pre-application discussions have commenced
West of High Garth, Kendal	26 (LADPD estimated 23)	Complete

Allocation Site	No. dwellings (Gross)	Status at end March 2020
North of High Sparrowmire, Kendal	24	Application pending at 31 March (SL/2018/0806) <i>Feb 2021 update:</i> Approved at planning committee in September 2019 subject to S106.
North of Laurel Gardens, Kendal	157	Application pending (SL/2019/0602) <i>Feb 2021 update:</i> Application approved at planning committee Jan 2021 subject to S106.
Eskdale House, Kendal	23	Complete
East of Castle Green Road, Kendal	60	No permission
West of Valley Drive, Kendal	60	Pre-application discussions have commenced
Kendal Parks, Kendal	200	Northern part – Phase 1 (50 units) complete. Phase 2 (22 units) complete, Phase 3 (30 units) (SL/2018/0959) approved at planning committee Dec 2019 subject to S106. Southern part – No permission
West of Oxenholme Road, Kendal	148	Phase 1 (30 units) Complete. Phase 2 (69 units) Under construction. Phase 3&4 (49 units) Reserved matters (SL/2018/0011) granted March 2020.
South of Natland Mill Beck Farm, Kendal	76	Complete
South of Lumley Road, Kendal	110	Under Construction
Stainbank Green, Kendal	189	Northern part (34 units) Permission has lapsed. Remainder (155 units) No permission <i>Feb 2021 update:</i> Application for 89 dwellings (SL/2020/0783) in northern part submitted Oct 2020 and pending.

Allocation Site	No. dwellings (Gross)	Status at end March 2020
Land at Vicarage Drive, Kendal	15	Complete
South of Underbarrow Road, Kendal	153	Full permission for 84 dwellings (SL/2019/0398) granted in western part of site July 2020. <i>Feb 2021 update:</i> SL/2019/0398 is under construction. Further application to the east of permitted site submitted in June 2020 for 19 dwellings (SL/2020/0410) Original permission for eastern part of site (47 dwellings SL/2016/0413) expired in Oct 2020.
Adjacent to Binfold Croft, Kirkby Lonsdale	10	Complete
Former Cedar House School, Kirkby Lonsdale	LADPD estimate 20. Current estimate 11.	Part under construction.
Land South and East of Milnthorpe, Milnthorpe	155	No Permission
Adjacent to St Anthony's Close, Milnthorpe	8	Full Permission
Land opposite the Wheatsheaf, Brigsteer	7	No Permission Now in Lake District National Park
Land Adjacent to Hall Park, Burneside	70	No Permission
Village recreation (Willink) Field and Tennis Courts, Burneside	Capacity now estimated at 30 (was 23).	No Permission
East of Boon Town, Burton-in-Kendal	23	Application (SL/2019/0359) for 28 affordable dwellings submitted May 2019. <i>Feb 2021 update:</i> Approved at planning committee in June 2020 subject to S106.
East of Hutton Close, Burton-in-Kendal	27	Under Construction
North of Sycamore Close, Endmoor	106	Under Construction

Allocation Site	No. dwellings (Gross)	Status at end March 2020
South of Bowling Green, Endmoor	25	No Permission
West of Burton Road, Holme	59	No Permission
East of Milnthorpe Road, Holme	73	No Permission
East of Greengate Crescent, Levens	49	Complete
West of Sedgwick Road, Natland	28	No Permission
Land East of Burton Road, Oxenholme	17	Complete
Land South of Fell Close, Oxenholme	104	Under Construction (Extra Care scheme)
Opposite Low Fell Gate Farm, Grange-over-Sands	46	No Permission
West of Cardrona Road, Grange-over-Sands	28	No Permission
North of Carter Road, Grange-over-Sands	42	Complete
South of Thornfield Road, Grange-over-Sands	64	Complete
Land South of Green Lane, Allithwaite	23	Under Construction
Land rear of Bankfield, Allithwaite	9	No Permission
Land rear of Barn Hey, Allithwaite	30	No Permission <i>Feb 2021:</i> Application submitted for 37 dwellings (SL/2021/0027) submitted Jan 2021.
Land North of Jack Hill, Allithwaite	LADPD estimate 27 Updated capacity: 22	Western Part (18 units) – Complete Eastern part (4 units) Full Permission <i>Feb 2021 update:</i> revised application for 5 dwellings submitted Nov 2019.
Land to rear of Almond Bank, Allithwaite	11	No Permission

Allocation Site	No. dwellings (Gross)	Status at end March 2020
Land at Haggs Lane, Cartmel	39	Approved subject to S106 agreement being finalised (SL/2017/0732)
Stables, Cartmel Racecourse, Cartmel	15	No Permission
North of Allithwaite Road, Flookburgh	24	No Permission
East of Manorside, Flookburgh	30	No Permission
Land East of Winder Lane, Flookburgh	17	No Permission
North Urswick Road, Ulverston	48	No Permission
Stone Cross Mansion, Ulverston	65	Under Construction <i>Feb 2021 Update:</i>
Croftlands East, Ulverston	330	Pre-application discussions underway.
Gascow Farm, Ulverston	235	Full Permission (SL/20161/0602) <i>Feb 2021 update:</i> Under construction
Croftlands West – Nook Farm, Ulverston	LADPD estimate 309.	Outline permission (330 units) for part of allocated site. <i>Feb 2021 update:</i> Reserved matters application (SL/2020/0397) received June 2020 and under consideration.
West End Farm, Ulverston	97	No Permission
West End Nursery, Ulverston	86	Full Permission <i>Feb 2021 update:</i> Under construction
North of Watery Lane, Ulverston	18	Application pending for up to 30 dwellings (SL/2018/0311) <i>Feb 2021 update:</i> Approved at planning committee in June 2020 subject to S106.

Allocation Site	No. dwellings (Gross)	Status at end March 2020
South of Lund Farm, Ulverston	101	Under Construction
Morecambe Road Scrapyard, Ulverston	12	No Permission
South of Stockbridge Lane, Ulverston	LADPD estimate 7. 6 completed.	Largely complete (one plot remains undeveloped)
Land East of Foxfield Road, Broughton-in-Furness	16	No Permission
Mid-Town Farm, Great / Little Urswick	27	No Permission
Land at The Old Vicarage, Greenodd / Penny Bridge	21	No Permission
Four Lane Ends, Kirkby-in-Furness	11	No Permission
Land adjacent Burlington CofE School, Kirkby-in-Furness	LADPD 41 Planning application 46	Application pending (SL/2018/0364 for 46 dwellings) <i>Feb 2021 update:</i> Approved at planning committee Dec 2019 subject to S106.
Land off Cross-a-Moor, Swarthmoor	161	No Permission (previous application for 140 units disposed of. Awaiting Highways England improvements)

Employment Sites

- 3.3.3 Allocated Employment sites are for 'Business' land uses as defined in the Town and Country Planning (Use Classes) Order 1987 (as amended). See the definition in the Glossary. There are 15 sites allocated solely¹⁰ for employment use in the Land Allocations DPD. The 1.2 hectare site allocated at Storth in the 2006 Local Plan for local employment use has been de-allocated, as at 28 March 2019. The Arnside and Silverdale Area of Outstanding Natural Beauty (AONB) Development Plan Document (DPD) adopted 28 March 2019 allocates two mixed use allocations (with employment elements) within the local planning authority area, one at Arnside and one at Sandside. For the monitoring period 1 April 2019 – 31 March 2020, there have been no completions for employment uses on allocated sites¹¹. The two allocated sites that have been completed for employment uses prior to this latest monitoring period, are both in east Ulverston: a development for Trittech Ltd - 'Land at Canal Head, Ulverston' in 2013/2014 and a development for Bender UK Ltd in 2016/2017.
- 3.3.4 The table below sets out the position for employment allocated sites at the end of March 2020. The table includes the enabling allocation at Burneside, for Cropper's Ltd.

Allocation Site	Ha. (Gross area allocated unless otherwise stated)	Status at end March 2020
1. Land at Canal Head, Ulverston, Phase 1 (Development for Trittech Ltd)	2.10	Completed (as at end March 2014)
2. Land East of Burton Road, Burton in Kendal	6.52	No planning permission, no application(s) submitted as at Mar. 2020.
3. Land at Lightburn Road, Ulverston	3.10 ¹²	Has planning permission for mixed use. As at Mar. 2020 – mixed use planning consent SL/2018/0812 for the retail elements (Aldi, Screwfix and M & S Food) has been completed, but the business uses are either under

¹⁰ Land Allocations not for mixed land use

¹¹ The completion of the residential annexe in Feb. 2018 on the southern part of the Foxfield employment allocation was given planning permission in February 2013, prior to the allocation of the site in December 2013.

¹² The employment allocation is for 3.10 ha, but the extant mixed use planning application is for a larger site and together with the planning consent for the Blue Light Hub, covers a site area of 3.25 ha.

Allocation Site	Ha. (Gross area allocated unless otherwise stated)	Status at end March 2020
		construction or some units haven't started. For monitoring purposes, taken as a whole, the development is not monitored as a completion until all of the development site is completed. The Blue Light Hub Building is still under construction. Business use (X2 office) units on the eastern part of the site are yet to start. A small part of the consent site where there's an existing dwelling, outbuildings and paddock is being marketed for sale as dwelling, outbuildings and paddock.
4. Land at Scroggs Wood, Kendal	11.20 (net developable area)	No planning permission Mar. 2020. No planning application submitted. The Screening Opinion SO/2019/0001 decision has been determined - Environmental Impact Assessment needed for proposal for mixed use development.
5. Land South of K Shoes, Natland Rd., Kendal	1.00	No planning permission, no application submitted as at Mar. 2020.
6. Land North Meadow-bank Business Park, Kendal	5.15 (alloc.) Pending plan. app. has site area 5.20 ha. to include highway works/proposed roundabout	No planning permission at Mar. 2020, application pending: Hybrid application.SL/2019/0743 full application for motor dealership including workshops, access roundabout, spinal road and internal access junctions and outline planning application all matters reserved, apart from access, for employment business park (indicatively B1/B2 6400m2 & B8 2500m2).

Allocation Site	Ha. (Gross area allocated unless otherwise stated)	Status at end March 2020
7. Land at Shap Rd. Industrial Estate, Kendal	0.34	No permission for business land use classes. Effectively, not currently available for business land use classes. Allocation site used for car parking as part of the Kentdale Jaguar Landrover motor dealership (sui generis use). Plus, SL/2015/1178 with permission on part of allocated site for two temporary buildings - part of dealership.
8. Land adjacent to Mainline Business Park, Milnthorpe	8.07	No planning permission, no application submitted as at Mar. 2020.
9. Land adjacent to Bridge End Business Park, Park Rd., Milnthorpe	1.81	No planning permission, no application submitted as at Mar. 2020.
10. <u>Enabling (own use)</u> allocation; Land adjacent to Cropper's Paper Mill, Burneside	1.20	No planning permission, no application submitted as at Mar. 2020. For monitoring purposes, not counted as available on the open market as an enabling allocation.
11. Land North of Gatebeck Lane, Gatebeck	3.13	Three planning permissions granted on different parts of site: (SL/2018/0148) Full, western part of site; and SL/2018/0859 hybrid application - Phase 1 full, Phase 2 outline, south east part of site (both consents not implemented as at Mar. 2020 and SL/2017/0241 – variation of condition relating to continue use as haulage depot on western part of site.
12. Land at Milnthorpe Rd., Holme	2.58	For employment uses, no planning permission, no application submitted as at Mar. 2020. Outline planning application (SL/2018/0134) refused and appeal dismissed (Oct. 2018) for up to 9 dwellings on part of allocation site.

Allocation Site	Ha. (Gross area allocated unless otherwise stated)	Status at end March 2020
13. Land at Elmsfield Park, Holme	3.04 (3.06 Ha relates to site area of planning app. ref SL/2019/0856)	Full planning application SL/2019/0856 approved Mar. 2020 on site a little larger than allocated site for erection of two buildings for use class B2 and B8. Very small part of south western site corner has extant planning consent for two workshops (SL/2009/0847).
14. Phase 1 Low Mill Tannery, Ulverston	0.72 allocated. Planning application 0.80.	Completed (as at 31 March 2017).
15. Land West of Foxfield Road, Broughton in Furness	0.47	Has got planning permission on the southern part of the allocation site (0.067ha) for a residential annexe SL/2012/0877, approved Feb. 2013 and completed Feb. 2018. The area available for employment uses reduced to 0.40 ha.

- 3.3.5 On the Lightburn Road allocation site in west Ulverston, the 'Blue Light Hub' emergency services development for Cumbria County Council is still under construction at March 2020. The main site access and junction improvements (traffic signals) have been put in, as has the internal site main distributor road.
- 3.3.6 On another part of the Lightburn Road allocation site, full planning permission SL/2018/0812 has been approved (revision of an earlier 2017 extant consent) for: 'use classes B1/B2/B8, two retail food store units (use class A1) a veterinary practice unit and the creation of new internal roads and car parking areas, hard and soft landscaping and boundary treatments'. The retail units M and S Food, Aldi and Screwfix have been completed and some of the employment units on the western part of the site are currently under construction at March 2020. SL/2018/0812 covers both part of the allocated site as well as additional non-allocated land to the immediate east. Business – (non-retail and veterinary uses) covers 1.66 hectares and includes land outwith the allocation site.
- 3.3.7 In Kendal, 0.34 hectares is allocated for employment uses at Shap Road (next to Kentdale Jaguar Landrover). It is considered that this site is effectively not currently readily available for business land use classes. The allocation site is being used for car parking as part of the operational use of the Kentdale Jaguar Land Rover motor

dealership. Part of the allocated site also has permission (SL/2015/1178) for two temporary buildings, as part of the dealership operation.

- 3.3.8 On the allocated employment site known as 'Land North of Gatebeck', full planning permission has been granted on the western (1.5 hectares) part of the allocation site for a two storey industrial unit. The unit to date (end Mar 2020) has not been constructed. The visibility splays to the site access have been widened. On the eastern part of the overall allocation site, full planning permission has been granted (SL/2018/0859) for two B2 (general industrial) and B8 (storage and distribution) buildings (Phase 1) on 2.06 hectares in the south east corner of the site and outline consent for a B1, (Business) B2 (general industrial) & B8 (storage and distribution) employment business park (Phase 2) adjacent. No work has commenced on site for Phase 1 as at the end of March 2020.
- 3.3.9 As at the end of March 2020 the determination of a hybrid planning application (ref. SL/2019/0743) is pending on the allocated site known as Land North of Meadowbank Business Park, Kendal. The proposal is submitted in full for 'a motor dealership including workshops, access roundabout and outline (with all matters reserved) for an employment business park (indicatively B1/B2 (Business and general industrial) 6400sqm & B8 (general industrial 2500sqm).
- 3.3.10 The Council is working (with relevant partners) to secure the implementation of key employment allocations. A development brief for the strategic employment site at Scroggs Wood, Kendal, was adopted in February 2015. The Cumbria Strategic Economic Plan¹³ (2014 – 2024) (p.18) identifies Kendal employment sites and Mainline, Milnthorpe, as sites to be brought forward by the development of a marketing and promotional strategy.
- 3.3.11 Development briefs have also been adopted for the following mixed use housing/employment land allocation sites:
- Land North of Kendal Road, Kirkby Lonsdale (April 2015);
 - Land South of Allithwaite Road, Kent's Bank (November 2016); and
 - Green Dragon Farm, Burton-in-Kendal (August 2017).
- 3.3.12 As the above Table at Paragraph 3.3.4 shows, seven years into the current Local Plan period, a significant amount of allocated employment sites are still to be delivered. As part of the review of the Local Plan, the Council will be reviewing potential new land for employment uses as well as its existing Local Plan unimplemented or part unimplemented employment land allocations and the identified broad location for employment development at Ulverston.

¹³ In the future to be replaced by the Cumbria Local Enterprise Partnership's 'Local Industrial Strategy' (LIS). The final draft version is dated March 2019. The draft Local Industrial Strategy was submitted to Government on 29 March 2019 and according to the LEP's website is in the co-production phase and over the coming months will be further refined prior to being finalised and published.

Mixed Sites

3.3.13 There are seven¹⁴ sites allocated for mixed residential and employment use, or a mix of other uses including an employment element. The housing development on part of the Berners Pool site in Grange over Sands is now complete. Progress is detailed in the table below. Data for both housing and employment sites relates to the position for the monitoring period, 1 April 2019 to 31 March 2020. Where the position has changed, between March 2020 and February 2021, this is noted.

+No.	Allocation Site	Number of dwellings (indicative) and employment (hectares)	Status at end March 2020
1a	Berners Pool, Grange over Sands (part)	43 dwellings and health centre	All Completed
1b	Berners Pool, Grange over Sands (local employment Business use)	0.30 ha	No planning permission, no application submitted.
2a	North of Kendal Road, Kirkby Lonsdale	78 dwellings	Planning Permission (full) and housing under construction.
2b	North of Kendal Road, Kirkby Lonsdale (local employment)	1.00 ha	Planning Permission (outline) for business (B1 use) and general industrial (B2 use) employment space. Reserved matters not submitted as yet.
3a	Land South of Allithwaite Road, Kents Bank	202 dwellings	Phase 1 – 92 dwellings full planning application pending at March 2020. Feb 2021 update: 87 unit scheme approved at planning committee Dec 2020 subject to S106. Applications for later phase not yet submitted.
3b	Land South of Allithwaite Road, Kents Bank (local employment).	1.50 ha	Outline planning application for mixed use development (Extra Care housing led) pending determination at March 2020. Feb 2021 update: approved at planning committee Dec 2020.

¹⁴ The seven sites include two mixed use sites located in the Arnside and Silverdale Area of Outstanding Natural Beauty (AONB).

+No.	Allocation Site	Number of dwellings (indicative) and employment (hectares)	Status at end March 2020
4a	Land at Green Dragon Farm, Burton in Kendal	86 dwellings	No planning permission, no application submitted.
4b	Land at Green Dragon Farm, Burton in Kendal (local employment)	0.75 ha	No planning permission, no application submitted. Same position
5a	Land at Guide's Lot, Grange over Sands	16 dwellings	No planning permission, no application submitted.
5b	Land at Guide's Lot, Grange (Local employment)	0.57 ha	No planning permission, no application submitted.
6	Station Yard, Arnside	No specific area given in allocating policy for employment uses. Whole developable area 0.65 ha	Allocated ¹⁵ for mixed uses including employment (business use) employment use limited to B1a, b and c. No planning permission, no application submitted as at Mar. 2020.
7	Land on Sandside Road and Quarry Lane, Sandside	No specific area given in allocating policy for employment uses. Whole developable area 3.10 ha	Allocated ¹⁶ for mixed uses including employment (business use) employment use limited to B1a, b and c and B8. Planning permission SL/2018/0129 approved April 2018 on part of site (prior to allocation) interim use, continued use as a builder's merchants.

Broad locations and other uses

- 3.3.14 Three broad locations for future development are identified in the Land Allocations DPD. One of the broad locations is identified for employment use in east Ulverston, north east of Canal Head, and two broad locations identified for housing in Kendal; at

¹⁵ Allocated Policy AS23 (A26/27) Station Yard, Arnside – Arnside & Silverdale Area of Outstanding Natural Beauty (AONB) Development Plan Document (DPD), adopted 28 Mar. 2019.

¹⁶ Allocated Policy AS25 (B35/B38/B81/B125) – Land on Sandside Road and Quarry Lane, Sandside – Arnside & Silverdale Area of Outstanding Natural Beauty (AONB) Development Plan Document (DPD), adopted 28 Mar. 2019

Appleby Road and Burton Road. Broad locations will be reviewed as part of the Local Plan review.

- 3.3.15 In terms of allocations for other uses, a site is allocated for formal outdoor sports facilities in Burneside and two sites are allocated for community use; one in Levens and the other in-between Little and Great Urswick. A mixed use 'Regeneration Opportunity Area' is identified at Canal Head, Ulverston. Implementation has not yet begun (as at March 2020), for any of these 'other use' sites.

3.4 Data

- 3.4.1 The table in this section presents the data for the district including contextual indicators and indicators to monitor the policies of the Core Strategy, Land Allocations document and remaining extant Local Plan policies. It also identifies indicators used to support the Sustainability Appraisal process. Targets are identified where applicable, although these do not exist for all indicators. Many indicators overlap and help us to monitor more than one set of policies.
- 3.4.2 In relation to the table's indicator targets, red shading in the progress column indicates a worsening position compared with the previous year's data, amber indicates a neutral position/no change and green shading, an improvement on the previous year.
- 3.4.3 There are a number of indicators previously used that can no longer be monitored due to unavailability of data and as such, these are now not included in this section.

Key:

CS = Core Strategy
LA = Land Allocations
OLP = Old Local Plan
CX = Contextual
SA = Sustainability Indicator
LPA = Local Plan Area

Table A - Economy

What does it monitor?	Indicator (CCC indicator)	Target	Area covered by data	Data for 2019/20 unless otherwise indicated	Comparison with previous years	Comparison with other areas	Progress
CS LA SA	Total amount of additional employment floorspace by type (completed net) (sq. m) Includes 'own use' sites (planning permissions).	Increase in the overall floorspace for all B uses	LPA	2019/2020 B1 (a): 263 B1 (b): 0 B1(c): -1,592.6 B2: 4,410 B8: 1,346 Total: <u>4,426.4</u> floorspace gain Comprising 6,652 gain and - 2, 225.6 loss.	2018/2019 B1 (a): 349.38 B1 (b): 0 B1(c): -105 B2: 1,456 B8: -635 Total: <u>1,065.38</u> floorspace gain Comprising 1805.38 gain and -740 loss.	Not relevant	Green

What does it monitor?	Indicator (CCC indicator)	Target	Area covered by data	Data for 2019/20 unless otherwise indicated	Comparison with previous years	Comparison with other areas	Progress
CS LA SA	Total amount of B use class employment floorspace gain on Previously Developed Land (PDL) by type (sq. m), expressed as a percentage of all B use class completions.	Increase in the percentage of land developed for B use classes on PDL.	LPA	2019/20 100% (6,652 sq. m)	2018/19 65% (1,309.10 sq. m) 2017/18 100% (2,479.2 sq. m)	Not relevant	Green
CS LA SA	Amount of land developed for all B use class employment (hectares) e.g. land allocated for development; new land take-up. Note – Includes ‘own use’ development completions.	4 hectares of employment land developed per annum 2010 – 2025, Core Strategy Policy.	LPA	2019/20 0.446 ha.	2018/19 0.496 ha.	Not relevant	Red
CS LA SA	Total employment land available (for all B land use classes, both allocations and permissions) (hectares.) Broken down into market sectors Excludes sites (planning permissions and allocations) for ‘own use’, not readily available on the commercial market.	Core Strategy Policy CS7.1 – ‘maintain a rolling provision of 5 years’ worth of supply (land) for each market sector... around 20 ha. of land’.	LPA	2019/20 54.913 ha. Comprising Strategic Market Sector: 11.2 ha. developable area at Scroggs Wood Local Employment Market Sector: 33.943 ha. Business Science Park Market Sector: 9.77 ha.	2018/19 54.78 ha. Comprising Strategic Market Sector: 11.2 ha. developable area at Scroggs Wood Local Employment Market Sector: 33.81 ha. Business Science Park Market Sector: 9.77 ha.	Not relevant	Green

What does it monitor?	Indicator (CCC indicator)	Target	Area covered by data	Data for 2019/20 unless otherwise indicated	Comparison with previous years	Comparison with other areas	Progress
CS LA OLP	Loss of employment floorspace (use classes B1 (a), (b), (c), B2 and B8 by completions) to housing and other uses (sq. m)	To reduce the overall total loss of employment land to non-employment uses	LPA	2019/20 -2,225.6 sq.m.	2018/19 -1,185.52 sq.m.	Not relevant	Red
CS CX	Earnings by residence – median gross weekly full time pay (those who live in the District)	Increase	District	2019/20 £536.10	2018/19 £535.2 2017/18 £570.5 2016/17 £536.3 2015/16 £545.7 2014/15 £519.4	NW 2019/20 £560.30 NW 2018/19 £555.8 NW 2017/18 £529.8 NW 2016/17 £514.5	Red
CS CX	Earnings by workplace – median gross weekly full time pay (those who work in the District)	Increase	District	2019/20 £450.70	2018/19 £464.0 2017/18 £503.1 2016/17 £477.0 2015/16 £481.7 2014/15 £449.0	NW 2019/20 £559.60 NW 2018/19 £550.5 2017/18 £529.9 2016/17 £514.2	Red

What does it monitor?	Indicator (CCC indicator)	Target	Area covered by data	Data for 2019/20 unless otherwise indicated	Comparison with previous years	Comparison with other areas	Progress
CS LA CX SA	Unemployment levels	Decrease	District	2019/20 1.1% (claimant based) ¹⁷ 1.8% (ONS model based)	2018/19 0.9% (claimant based) ¹⁸ 1.8% (ONS model based) 2017/18 0.5% (claimant based) 2.0% (ONS model based) 2016/17 0.7% (claimant based) 2.2% (ONS model based)	2019/20 NW 3.7% (claimant based) 4.1% (ONS model based)	Red (using claimant based unemployed data)
CS LA CX SA	% working age - economically active	100%	District	2019/20 83.5%	2018/19 84.6% 2017/18 88.7% 2016/17 85.8%	2019/20 NW 78.1%	Red
CS LA	% of people of working age in	Increase	District	2019/20 82.1%	2018/19 82.9%	2019/20 NW	Red

¹⁷ There are two ways of measuring/reporting the local unemployment rate; Claimant based unemployed and the Office for National Statistics (ONS) Model based unemployed. Claimant-based unemployed: The continuing rollout of Universal Credit across the country and the move towards a digital system has limited the range of information currently available on claimant unemployment and broader measures of joblessness and this will not be improved until the rollout is complete. At present therefore, the claimant count (which is a monthly count from administrative records of those claiming Jobs Seeker's Allowance plus those claiming Universal Credit who are required to seek work) is the most accurate measure of unemployment locally. Claimant based rates are calculated as % of the whole working age population not the economically active population as is the case for the ONS model-based count.

¹⁸ There are two ways of measuring/reporting the local unemployment rate; Claimant based unemployed and the Office for National Statistics (ONS) Model based unemployed. Claimant-based unemployed: The continuing rollout of Universal Credit across the country and the move towards a digital system has limited the range of information currently available on claimant unemployment and broader measures of joblessness and this will not be improved until the rollout is complete. At present therefore, the claimant count (which is a monthly count from administrative records of those claiming Jobs Seeker's Allowance plus those claiming Universal Credit who are required to seek work) is the most accurate measure of unemployment locally. Claimant based rates are calculated as % of the whole working age population not the economically active population as is the case for the ONS model-based count.

What does it monitor?	Indicator (CCC indicator)	Target	Area covered by data	Data for 2019/20 unless otherwise indicated	Comparison with previous years	Comparison with other areas	Progress
	employment				2017/18 86.3% 2016/17 85.3% 2015/16 80.2%	74.8%	
CS LA CX	Employees by sector ¹⁹ <ul style="list-style-type: none"> • Primary Services (agriculture, forestry and mining/quarrying) • Energy and Water • Manufacturing • Construction • Services (sub-totals for services below) <ul style="list-style-type: none"> – Wholesale and retail trade, including motor trades – Transportation and storage – Accommodation and food services – Information and communication – Financial and other business services – Public admin, education 	Improvement in the balance between sectors e.g. increased proportion in manufacturing, information & communication and financial and other business service sectors	6.2	2019/20 1.7% 1.0% 9.4% 4.7% 82.1% 18.9% 2.8% 18.9% 1.7% 8.3%	2018/19 1.4% 0.9% 9.6% 4.8% 81.7% 19.2% 2.4% 19.2% 1.5% 7.3%	2019/20 NW 0.5% 1.2% 9.3% 4.6% 84.5% 16.2% 5.6% 6.9% 2.8% 13.1%	Amber

¹⁹ excluding farm-based agriculture, self-employed, government-supported trainees and HM Forces

What does it monitor?	Indicator (CCC indicator)	Target	Area covered by data	Data for 2019/20 unless otherwise indicated	Comparison with previous years	Comparison with other areas	Progress
	<i>and health</i> – <i>Other Services</i>			24.5% 7.0%	25.9% 5.6%	35.3% 4.5%	
CX CS	Qualifications <ul style="list-style-type: none"> % working age population with NVQ4 equivalent or higher 	Increase	District	2019 42.3%	2018 41.9% 2017 43.3% 2016 39.5% 2015 40.0%	2019 NW 36.1% 2018 NW 35.5% 2017 NW 34.5%	Green
CX CS	Qualifications <ul style="list-style-type: none"> % working age population with no qualifications 	Decrease	District	2019 2.8%	2018 4.3% 2017 4.9% 2016 6.2% 2015 5.3%	2019 NW 8.7% 2018 NW 9.1% 2017 NW 9.0%	Green
CS LA CX OLP	% of empty shops	Decrease	District	2019 9.86%	2018 8.06% 2017 8.56% ²⁰ 2016 8.14% 2015 8.24%	2019 NW % No figures	Red
CS	Total completed floorspace (square metres) (net) for town centre uses i) within town centre areas and	Significant proportion should be town centre	LPA	2019/20 Within town centre areas: <u>Total completed floorspace</u> <u>0.00 sq.m. No net loss or gain of floorspace.</u>	2018/2019 Within town centre areas: <u>Total completed floorspace loss of 565 sq. m.</u>	Not relevant	Red

²⁰ Figures for past years have been updated to maintain consistency in the method of calculation.

What does it monitor?	Indicator (CCC indicator)	Target	Area covered by data	Data for 2019/20 unless otherwise indicated	Comparison with previous years	Comparison with other areas	Progress
	ii) in the local authority area outwith town centres <i>Main Town centre uses are defined in the Glossary</i>			<p>comprising:</p> <p>A1 loss 0.00 A2 gain 0.00 A3 gain 0.00 A4 gain 0.00 A5 gain 0.00 B1a loss 0.00 C1 gain 0 D1 gain 0 D2 gain 0 Sui generis gain 0</p> <p>Town Centre Use Class completions within LPA but outside defined Local Plan Town Centre boundaries:</p> <p><u>1,202 sq. m</u>, comprising:</p> <p>A1 loss 66 A2 loss 0 A3 gain 0 A4 gain 0 A5 gain 89 B1a gain 263 C1 loss 378 D1 gain 0 D2 gain 1,511 Sui generis loss 217</p>	<p>comprising:</p> <p>A1 loss 941 A2 gain 75 A3 gain 235 A4 gain 183 A5 gain 116 B1a loss 233 C1 gain 0 D1 gain 0 D2 gain 0 Sui generis gain 0</p> <p>Town Centre Use Class completions within LPA but outside defined Local Plan Town Centre boundaries:</p> <p><u>1,370 sq. m</u>, comprising:</p> <p>A1 gain 467 A2 loss 506 A3 gain 68 A4 gain 0 A5 gain 0 B1a gain 582 C1 gain 0 D1 gain 621 D2 gain 252 Sui generis loss 114</p>		

What does it monitor?	Indicator (CCC indicator)	Target	Area covered by data	Data for 2019/20 unless otherwise indicated	Comparison with previous years	Comparison with other areas	Progress
CS LA	Number of jobs (total employee jobs - count). Source ONS (Business and Employment Survey), excludes farm based agriculture, self-employed, government supported trainees and HM Forces data	Increase of 1000	District	2019 52,000	2018 51,000 2017 49,000 2016 52,000 2015 50,000	2019 NW 3,391,000	Green
CX SA	Gross Value Added (per head of population)	Increase	District	2018 £24,509	2017 £23,135 2016 £25,317 2015 £24,277	NW 2018 £23,953 2017 £23,918 2016 £23,804	Green
CX CS OLP	Car Ownership (households) % 2 or more cars % 1 car % 0 car	Reducing number of cars per household	District	2011 38.9% 45.8% 15.3%	2001 34.3% 48.6% 17.14%	NW 2011 29.5% 42.5% 28%	Red
CX CS OLP	% Population aged 16 to 74 who travel to work by • Work at home • Foot or cycle • Car, van, m/cycle or taxi (inc. as passenger) • Public Transport • Other/not in employment	Increasing % using foot, cycle or public transport and decreasing % using private transport	District	2011 6.5% 14.1% 44.5% 2.3% 32.4%	2001 9.8% 12.5% 40.4% 1.3% 35.2%	NW 2011 2.7% 8.1% 43.7% 7.3% 37.7%	Amber

What does it monitor?	Indicator (CCC indicator)	Target	Area covered by data	Data for 2019/20 unless otherwise indicated	Comparison with previous years	Comparison with other areas	Progress
CS LA SA	<p>% User population within 30 minutes of key services by public transport/walking²¹</p> <p>The 'user' populations are: Primary School: 5-10 yr olds, Secondary School: 11-15 yr olds, Further Education: 16-19 yr olds, Employment Centre: 16-74 yr olds GP, Hospital, Town Centre, Food Shop: All households</p>	To increase	District	<p>2017</p> <p>Primary School 93% Secondary School 73% Further Education 67% Employment Centre Small 78% Employment Centre Med 500-4999 jobs 85% GP 85% % Hospital 24% Town Centre 66% Food Shop 88%</p>	<p>SLDC: 2016, 2015, 2014</p> <p>PS: 93%, 94%, 93% SS: 79%, 80%, 76% FE: 71%, 72%, 66% ECSm: 63%, 78%, 77% ECMed: 81%, 81%, 79% GP: 90%, 90%, 90% Hosp: 27%, 27%, 24% TC: 66%, 67%, 67% FS: 89%, 89%, 85%</p>	<p>North West</p> <p>PS 99.8% SS 98.8% FE 98.1% ECSm 97.6% ECMed 98.9% GP 99.1% Hosp 81.9% TC 98.3% FS 99.2%</p> <p>Rural Areas²² - England</p> <p>PS 94.3% SS 65.7% FE 51% ECSm 61.0% ECMed 80.4% GP 87.8% Hosp 9.9% TC 54.5% FS 88.9%</p>	Amber

²¹ Using the Department for Transport's 'Journey Time Statistics' datasets - <https://www.gov.uk/government/collections/journey-time-statistics>

²² Using Defra's Rural-Urban Classification – areas defined as rural if they fall outside of settlements with more than 10,000 resident population

Sources: NOMIS, Census 2011, Office of National Statistics, The Local Data Company, Cumbria County Council ELA and Floorspace Monitoring. SLDC Planning Applications Web Pages and reports of completed development from Building Control.

Table B: Housing

What does it monitor?	Indicator (CCC indicator)	Target	Area covered by data	Data for 2019/20 unless otherwise indicated	Comparison with previous years	Comparison with other areas	Progress
CX	Population Total (ONS) <ul style="list-style-type: none"> Kendal Ulverston Grange-over-Sands Kirkby Lonsdale (inc. Barbon & Casterton) Milnthorpe 	No target	District	Mid-2019 105,088 33,931 13,321 4,639 2,429 2,220	Mid – 2018 Mid-2017 104, 532 104,321 33,885 33,662 13,254 13,296 4,259 4,155 2,385 2,380 2,196 2,220	Mid-2019 NW 7,341,196 Cumbria 500,012	N/A
CX CS	Population estimate (ONS) <ul style="list-style-type: none"> 0-14 Older people (over 65) 	Improved balance	District	2019/20 14.8% 28.5%	2018/2019 2017/18 13.7% 13.8% 28.1% 27.7%	2019/20 Cumbria 16.5% 24.5%	Red
CX	Ethnicity <ul style="list-style-type: none"> White Black or minority ethnic group 	No target	District	2011 95.6% 4.4%	2001 99% 2.45%	E&W 2011 80.5% 19.5%	N/A
CX CS LA	Number of households	No target	District	2011 46,552	2001 44,129	Not relevant	N/A
CX CS LA	Total housing stock	No target	District	2019/20 55,820	2018/19 55,490 2017/18 55,140 2016/17 54,830	2019/20 Cumbria 250,975	N/A
CX	Average Household Size	No target	District	2011 2.2	2001 2.24	2011 NW & UK 2.3	N/A

What does it monitor?	Indicator (CCC indicator)	Target	Area covered by data	Data for 2019/20 unless otherwise indicated	Comparison with previous years	Comparison with other areas	Progress
CX CS LA	Housing Tenure (%) ²³ <ul style="list-style-type: none"> Private housing * Local Authority Registered social landlord Other public sector <p>* comprises owner occupied, private rented and shared ownership dwellings</p>	No target	District	2019/20 91.26 0.00 8.71 0.03	2018/19 2017/18 91.41 91.46 0.00 0.00 8.56 8.51 0.04 0.04	2019/20 Cumbria 86.61 1.03 12.33 0.03	N/A
CX CS LA	% Dwellings unoccupied and used as a second home (% of total housing stock)	Reduction	District	2019/20 7% (NB. with effect from 1/4/13 SLDC no longer awards a council tax discount for second homes so there is no incentive for owners to declare them as such.)	2018/19 7.02% 2017/18 6.98% 2016/17 7.36% 2015/16 7.21%	TBA	Amber
CS LA	Number of net additional dwellings (For housing trajectory see Appendix A, and for past delivery record see Appendix B)	290 dwellings per year (OAN as calculated in 2017 Strategic Housing	LPA	2019/20 223 123 PSCs 38 KSCs 33 LSCs 29 Rural	2018/19 268 114 PSCs 52 KSCs 75 LSCs 27 Rural	Not relevant	Red

²³ Originally, this indicator was based on 2011 census figures, amended following stock transfer to SL Housing in 2012. However, in 2016 Government figures were simplified, combining owner occupied, private rented and shared ownership dwellings together under the term 'private housing stock'.

What does it monitor?	Indicator (CCC indicator)	Target	Area covered by data	Data for 2019/20 unless otherwise indicated	Comparison with previous years	Comparison with other areas	Progress
		Market Assessment)					
National Requirement	Housing Delivery Test (HDT) Result	100%	District	175% (2019 test result published Feb. 2020)	n/a	n/a	Green
National Requirement	Five year supply position	5 years	LPA	2020: Standard Method: 13.28 years OAN: 6.80 years	2019: Standard Method: 14.92 years OAN: 7.73 years		Green
CS LA SA	Gross affordable housing completions <ul style="list-style-type: none"> as a number as a % of total (gross) housing completions and as a % of housing completions on major sites (10+ dwellings) 	35% on schemes of 9 or more dwellings in PSCs / KSCs and of 3 or more elsewhere 1,000 affordable homes for rent by 2025	LPA	2019/20 <ul style="list-style-type: none"> 34 14% 23% 	2018/19 2017/18 <div> 61 80 23% 26% 29% 39% </div>	Not relevant	Red
CS LA SA	New and converted dwellings on previously developed land	At least 28%	LPA	2019/20 55 (25%): 28 PSCs; 5 KSCs; 9 LSCs; 13 Rural	2018/19 88 (33%): 73 PSCs; 7 KSCs; 1 LSCs; 7 Rural	TBA	Red

What does it monitor?	Indicator (CCC indicator)	Target	Area covered by data	Data for 2019/20 unless otherwise indicated	Comparison with previous years	Comparison with other areas	Progress
CS LA SA	Average density per hectare for all housing developments	Average of at least 30 dwellings per hectare (dph) on sites of 10+ dwellings	LPA	2019/20 52.47 dph comprising: 9 (45%) on sites <30 dph; and 11 (55%) on sites >30 dph	2018/19 54.8 dph comprising: 10 (50%) on sites <30 dph; and 10 (50%) on sites >30 dph	Not relevant	Green
CX CS LA	Average (median) House Price	Improved ratio to incomes – see also below	District	2019 £245,000	2018 £225,000 2017 £225,000 2016 £218,000 2015 £207,750	2019 Cumbria £167,500 NW £165,000	Red
CX CS LA SA	House Price: Income Ratio (median annual gross income by workplace, and by residence)	Decrease	District	2019 9.49 8.15	2018 8.34 7.65	2019 Cumbria NW 5.74 5.86 5.68 5.79	Red
CS	Net additional Gypsy & Traveller pitches	To match identified needs	LPA	2019/20 0	2018/19 0 2017/18 0 2016/17 0 2015/16 0	N/A	N/A
CS LA	Extra Care Housing Delivery	To match identified needs	LPA	2019/20 0	2018/19 0 2017/18 0 2016/17 0 2015/16 60 assisted living flats	N/A	N/A

What does it monitor?	Indicator (CCC indicator)	Target	Area covered by data	Data for 2019/20 unless otherwise indicated	Comparison with previous years	Comparison with other areas	Progress
CS	Number of entries on self-build register. Number of entries added to self-build register in monitoring period.	No target	LPA	At 31/03/2020 64 9	At 31/03/2019 55 At 31/03/2018 35 At 31/03/2017 25	Not relevant	N/A
CS	Number of plots permitted for self-build/custom build housing	Sufficient permission for self-build plots to meet demand	LPA	2019/20 28	2018/19 21 2017/18 30 2016/17 22 2015/16 21	Not relevant	Green
CS	Number of self-build/custom build completions.		LPA	2019/20 5	2018/19 9 2017/18 2 2016/17 1 2015/16 0	Not relevant	N/A

Sources: NOMIS, Census 2011, Office of National Statistics, Cumbria Intelligence Observatory, SLDC

Table C: Environment

What does it monitor?	Indicator (CCC indicator)	Target	Area covered by data	Data for 2019/20 unless otherwise indicated	Comparison with previous years	Comparison with other areas	Progress
CX SA OLP	Area designated as SSSI (ha)	No change <u>or</u> an increase	LPA	2019/20 22,448.61143	2018/19 22,323 2017/18 22,323 2016/17 21,551.67 ²⁴ 2015/16 22,708.11 2014/15 22,708.11	Not relevant	Green
CX SA OLP	% SSSI in recovering or favourable condition	Increase	LPA	2019 98.32%	2018 98.5% 2017 98.5% 2016 98.5% 2015 99.0% 2014 94.4%	Not relevant	Amber
CX CS SA	River Quality % at good ecological status or potential	Increase	District	2019 51.88%	2017 52% 2016 61% 2015 61% 2013 50%	Not relevant	Red
CX CS SA OLP	% Household Waste Recycled or Composted	Increase	District	2019/20 45.0%	2018/19 44.3% 2017/18 44.4% 2016/17 42.4% 2015/16 41.90%	TBA	Green
CX CS SA	Volume of Household waste	Decrease	District	2019/20	2018/19 469	TBA	Green

²⁴ There have been no changes to the District's SSSIs, so this lower figure is probably due to extensions to the Lake District and Yorkshire Dales National Parks causing a reduction in the Local Planning Authority's area and lack of precision in the new boundaries.

What does it monitor?	Indicator (CCC indicator)	Target	Area covered by data	Data for 2019/20 unless otherwise indicated	Comparison with previous years	Comparison with other areas	Progress
OLP	collected per person per year (kg per household)			462	2017/18 468 2016/17 511 2015/16 502		
CX CS SA OLP	Renewable Energy given planning permission (MW)	Increase	LPA	2019/20 1.576 MW	2018/19 0.15MW 2017/18 0.004MW 2016/17 0.272MW	Not relevant	Green
SA CS LA OLP	Number of planning permissions granted contrary to Environment Agency advice on flooding and water quality grounds	Zero	LPA	2019/20 0 (No permissions granted contrary to EA advice for both flood risk and water quality). Two applications are undetermined/pending decision.	2018/2019 1 (flood risk – SL/2018/0782, as no FRA submitted) 2017/18 0 (for both flood risk and water quality) 2016/17 0 (for both flood risk and water quality)	Not relevant	Green
SA CS OLP	Heritage Assets at Risk (Historic England Register)	Decrease	LPA	2020 Listed Buildings at Risk: 2 Scheduled Monuments at Risk: 12 Conservation Areas at Risk: 1 (Burton-in-Kendal) Total: 15	2019 Listed Buildings at Risk: 2 Scheduled Monuments at Risk: 13 Conservation Areas at Risk: 1 (Burton-in-Kendal) Total: 16	N/A	Green
CS LA SA	% air quality monitoring sites recording NO ₂ above 40	Zero	LPA	2019/20 4% (one site of 24) ²⁵	2018/19 3% (1 site of 23) 2017/18 3% (1 site of 23)	Not relevant	Amber

²⁵ For 2019/2020 the number of sites monitored was 24. For previous years the number of sites monitored was 33. If monitored sites are well below the objective, local authorities are encouraged to remove the sites in order to use resources effectively.

What does it monitor?	Indicator (CCC indicator)	Target	Area covered by data	Data for 2019/20 unless otherwise indicated	Comparison with previous years	Comparison with other areas	Progress
	ug/m3				2016/17 3% (1 site of 23)		

Sources: Natural England, Environment Agency, Historic England, SLDC monitoring.

Table D: Health and Wellbeing

What does it monitor?	Indicator (CCC indicator)	Target	Area covered by data	Data for 2019/20 unless otherwise indicated	Comparison with previous years	Comparison with other areas	Progress
CX SA	Life expectancy <ul style="list-style-type: none"> Male Female 	Favourable compared to wider local averages	District	2016-18 81.9 84.7	2015-17 82.2 85.0 2014-16 81.5 84.6	2016-18 England 79.6 83.2 Cumbria 79.4 82.9 2015-17 England 79.6 83.1 Cumbria 79.4 82.8	Red
CX	Index of Multiple Deprivation (Rank of Av. Score)	Increase (towards 317)	District	2019 250 (out of 326)	2015 258 (out of 326) 2010 231 (out of 326)	Highest in Cumbria	Red
CX SA	Annual crime rate per 1000 population	Decrease	District	Jul-2019/June-20 51.5	Aug-2018/Jul-19 51.9 2017/18 Aug17-Jul18 44.9 2016/17 52.5	2019/20 Cumbria 72.0; Eden 48.4; Barrow 87.9	Green
SA	% people whose day-to-day activities are limited by a long term health problem or disability	Decrease	District	2011 18.8	2001 18.5	2011 Cumbria 20.3 NW 20.2	Red

Sources: ONS, Cumbria Intelligence Observatory, Census, Public Health England ('Fingertips' Local Authority Health Profiles).

3.5 Data Assessment

Economy

- 3.5.1 The Covid-19 pandemic has had an impact on the local economy during the 2019/20 monitoring year. In terms of monitoring indicators, the effects will be reported on in the 2020/2021 AMR.
- 3.5.2 **Earnings, people of working age in employment, empty shops and unemployment rate: Key messages are:**
- Labour Demand: the gross weekly earnings by workplace of all full time workers (median value) that work in the district have fallen from £464.00 in 2019 to £450.70 (£451) in 2020. In comparison, Cumbria's other district local authorities had gross weekly earnings in the following range for 2020: Eden (£518); Carlisle (£553); Allerdale (£511); Barrow Borough (£634) and Copeland (£950). These districts had higher gross median weekly full time earnings than South Lakeland²⁶. The median figure is skewed by the presence of large relatively well-paying employers such as BAE Systems in Barrow-in-Furness and Sellafield in Copeland.
 - Labour Supply: gross weekly earnings by residence of all full time workers living in South Lakeland (median value) – those that live in the district (but may work elsewhere), have risen very slightly in the past year, from £535.2 (£535) in 2019 up to £536.10 (£536) in 2020. The 2020 figure for South Lakeland is lower than Carlisle District (£551) but higher than Eden (£527)²⁷. Over the past few years median earnings by residence in South Lakeland have fluctuated from year to year. Apart from 2019 and 2020, the general trend over time from 2002 to 2018 has been for gross weekly earnings to rise.

Figures for earnings by residence and workplace come from an annual survey and do not cover the self-employed. The median gross weekly earnings by residence, people who live in the district but may work elsewhere, are higher than earnings by workplace. This suggests that South Lakeland residents earn greater levels of income by out-commuting.

- Labour Supply: there has been a decrease in the percentage of people of working age (16 to 64) who are economically active in employment in the district over the past year. The percentage fell from 84.6% in 2018/2019 down to 83.5% in 2019/20. Since 2014, albeit allowing for yearly fluctuations, the general trend in South Lakeland has been for a rise in the percentage of working age people in employment. This has recently changed, with decreases since 2017/18. However,

²⁶ Figures for the districts in brackets are rounded up to 1 decimal place or whole numbers

²⁷ Figures for the districts in brackets are rounded up to 1 decimal place or whole numbers

the figures for South Lakeland have consistently been higher than the comparable national and north-west percentages and this remains so. The labour supply (working age population) in South Lakeland is a key issue, it has been declining since about 2005. In the year to June 2019 about half (50.3%) of all those economically inactive in South Lakeland were retired²⁸. An increasing working age population is needed to support business retention and growth and to ensure economic vibrancy in towns and villages.

- In Cumbria as a whole, the population of working age (16 – 64) has been contracting and fell by 6% over the last 10 years²⁹. The Cumbria LEPs proposed Cumbria Local Industrial Strategy³⁰ includes a strategic objective to expand the numbers and skills of the Cumbrian workforce and sets out actions needed to create the future workforce which includes maintaining the existing workforce and attracting more people of working age.
- the unemployment rate for the district increased in 2019/20 by 0.2% (2019/2020 claimant based count of 1.10%). Using the ONS Model, the unemployment rate for 2018/19 and 2019/2020 remained unchanged at 1.8%. Overall compared to the north west region (3.7% Claimant based), unemployment rates are relatively low.
- the percentage of empty shops in the district's town centres has increased over the past year from 8.06% to 9.86%. This is a yearly average for all the town centres across the district including those within the national parks.

3.5.3 Employees by job sector:

Labour demand: Looking at employment within the district by job sector, key points for 2019/2020 are:

- an increase in the percentage of employees employed in the service industries, from 81.7% in 2018/2019 up to 82.1% in 2019/20; and
- employment in manufacturing fell slightly; from 9.6% in 2018/2019 down to 9.4% in 2019/2020, and the percentage of district employees employed in the construction sector also fell, from 4.8% in 2018/2019 down to 4.7% in 2019/2020.

3.5.4 Number of jobs:

The figures for 2019 show total employee jobs in the district being 52,000. The comparable figure for 2018 was 51,000. Of the 2019 52,000 jobs, 33,000 are full time and 20,000 are part time.

²⁸ There are no comparable figures for 2019/2020 April to March as the sample size is too small for a reliable estimate at district level. Source ONS Annual Population Survey.

²⁹ Cumbria Local Industrial Strategy, March 2019, Table 2.2, page 12.

³⁰ Cumbria's Local Industrial Strategy, March 2019, Cumbria Local Enterprise

Partnership. <https://www.thecumbrialep.co.uk/resources/uploads/files/Local-Industrial-Strategy.pdf>

3.5.5 There still remains a need for an increased number of jobs, but it will also be key to ensure that these are more highly skilled and paid jobs and also that the local skills base matches these to enable local people, especially young people, to take up these jobs. This is a key issue locally and also in the Cumbria wide economy.

3.5.6 **Skills and training:**

For 2019:

- 42.3% - an increase of 0.4% on the previous year for the percentage of working population with NVQ4 equivalent or higher qualifications; and
- 2.8% – a decrease of 1.5% on the previous year for the percentage of working age population with no qualifications.

3.5.7 The Cumbria Local Economic Partnership (LEP) has published a 'Skills Investment Plan' in collaboration with employers and others, which seeks to: increase apprenticeships within the County; increase the number of working age people with HND qualifications; and increase the number of people in employment and workforce development support and targeted training for sectors with skills gaps.

3.5.8 The review of the Local Plan will consider issues such as education and skills in the context of the local economy and the updated strategic policy approach.

3.5.9 **Tourism and the local economy:**

3.5.10 The district economy is highly dependent on tourism. Its value to the local economy has been significantly affected during 2020 by the Covid – 19 Pandemic. The data below is taken from STEAM research³¹:

3.5.11 Between 2019 and 2020, South Lakeland district saw a decrease of -51% in tourist numbers and -49% in tourism revenue. This is equivalent to a loss of 9.64 million visitors and £678 million pounds

3.5.12 The significance to the local economy and the sectors continued growth (pre Covid 19 Pandemic) has implications for land use planning policy and the review of Local Plan planning policy relating to tourism; the strategy for tourism/ tourism related development (visitor attractions and accommodation) and its management. Increasing growth in tourism revenue has impacts. Increased visitor numbers together with a need for rural based businesses to diversify, given the current economic context, has seen consistent and increasing pressure for tourist accommodation, both the quantity and quality of the offer.

³¹ STEAM (Scarborough Tourism Economic Activity Monitor) a research model used by Cumbria Tourism to estimate the volume and value of tourism in South Lakeland. Tourism in Cumbria 2020 – Key Facts and Trends

3.5.13 Retail and other town centre land uses:

- 3.5.14 Local Plan policy relating to town centre uses (Local Plan – Land Allocations Policy LA1.2) seeks to ensure the vitality, viability and sustainability of town centres, by advising that town centres will be the preferred location for leisure, entertainment, food and drink, arts, tourism and office uses.
- 3.5.15 Monitoring of the proportion of town centre land use class completions (net) within the defined town centre boundaries and elsewhere, has been undertaken since 2014/2015. Before that it was monitored up to 2006/2007.
- 3.5.16 Nationally the nature of the high street is changing. There is a general trend for an increase in service type uses; for example, food and drink, hair & beauty and leisure uses. The review of the Local Plan, informed by evidence, will identify issues facing local retail centres and appropriate land use planning policy approaches. The following paragraphs look in more detail at change in town centres within South Lakeland's local planning authority area (LPA), over recent monitoring years.
- 3.5.17 The level of town centre floorspace completions varies from year to year; both net gains and net losses and by land use type. For the monitoring period 2019/2020 there was no net completions, so no net loss or gain of floorspace for town centre uses³² within town centre areas³³ within the LPA. In comparison, for 2018/19 there was an overall net loss of town centre floorspace completions of 565 square metres.
- 3.5.18 For the 2019/2020 monitoring period, outside defined Local Plan town centre boundaries, the total completed net gain of town centre uses floorspace was 1,202 square metres. This net floorspace total was comprised of a variety of land use completions including: A1 use – retail 66 square metres loss; B1 a use – office 263 square metres gain; A5 use – non-residential institutions e.g. day nurseries 89 square metres gain; D2 use – assembly and leisure (e.g. gymnasiums) 1,511 square metres gain; C1 use – Hotel 378 square metres loss; and sui generis (a use class in its own) 217 square metres loss. For 2018/2019 the comparable total net completions figure was for a net gain of 1,370 square metres. It included gains in floorspace (completions) for B1 a – offices, D1 assembly and leisure, and A1- retail.
- 3.5.19 The above data, taken together with comparable data over recent monitoring years confirms that the nature and demand for certain uses within the town centres is changing e.g. the loss of retail and ancillary office use and an increasing demand for food and drink uses and business that provide a service such as beauty and hairdressing. Ancillary office and storage space above retail premises is also being lost to residential use. This trend is also being seen to a lesser or greater degree in town centres nationally. This has implications for the review of Local Plan Policy relating to the mix of

³² The terms 'main town centre uses' and 'town centre' are defined in the glossary

³³ Town centre areas – areas within the defined boundaries of Kendal, Ulverston, Kirkby Lonsdale, Milnthorpe and Grange-over-Sands. South Lakeland Local Plan – Land Allocations Development Plan Document, 2013.

town centre uses going forward. One aspect of the changing nature of town centres is the effect on the mix of uses outside of the defined town centres. In terms of planning policy the preferred location for leisure uses such as gyms is within the town centre boundaries. In recent years there has been a demand for these types of uses outside of town centres. This suggests that there is a lack of suitable premises within town centres. The cost of buying or renting premises and inflexible leases may also be a factor.

- 3.5.20 **Employment land and floorspace:** For the monitoring year 2019/2020, there has been an increase in the total amount of net additional employment (business land use classes B1 (a), (b), (c), B2 and B8) floorspace completed in the local planning authority area. The figure for the 2019/2020 monitoring year was a net gain of 4,426.4 square metres compared with a net gain of 1,065.38 square metres of completed floorspace for 2018/2019. The completed floorspace figures tend to fluctuate from year to year as they represent the general churn in floorspace with the change of use and conversions of buildings. The comparable figure for the previous year, 2017/2018, was a net gain of 1,169 square metres.
- 3.5.21 The amount of employment floorspace (gain) completed on previously developed land (brownfield sites, so includes changes of use) also tends to fluctuate from year to year, depending on the number and types of development. For the monitoring year 2019/2020, 100% (6,652 square metres) of employment floorspace (net gain) was completed on previously developed land. Most of this floorspace related to the completion of an extension to existing buildings at Elmsfield Park, Holme. For comparison, in 2018/2019 the percentage of employment floorspace completions on previously developed land was 65% (1,309.10 square metres) and for 2017/2018, 100% (2,479.2 square metres).
- 3.5.22 In 2019/2020 0.446 hectares of land was completed which is classed as 'new land take – up'. New land take up is where new areas of land are being identified and brought forward for employment uses e.g. greenfield sites or where there is a change of use of land from a non-employment use to one of the business land use classes. The 0.446 hectares related to changes of use from car park areas on a vacant plot on Mintsfeet Industrial Estate and at a site in Gatebeck. For preceding years, in the 2018/2019 monitoring period there was 0.496 hectares of new land take up completed. This related to a greenfield non-allocated site at Prizet. There was 0.21 hectares of new land take up for employment uses in 2017/2018.
- 3.5.23 The gross loss of employment floorspace (completed development) to other non-employment uses, such as to housing, in the LPA has increased over the monitoring period 2019/2020 compared to 2018/2019. The total figure for 2019/2020 was a loss of 2,225.6 square metres of employment floorspace. This included 715 square metres of floorspace loss to housing and 1,511 square metres lost to leisure use e.g. gyms.
- 3.5.24 Employment land available (business land use class) in the LPA at the end of March 2020 stands at 54.913 hectares, comprising: 11.2 hectares for strategic employment use; 33.94 hectares of local employment land; and 9.77 hectares of business/science park land.

3.5.25 The above analysis of economic monitoring information raises some policy issues for the Local Plan review and the next stage in the process – Issues and Options:

- the need to retain and attract skilled labour; the population of working age who are economically active is declining;
- the need to review the current portfolio of land (allocations) and premises. Employment land take up has been slow;
- the significance of the tourism sector to the district's local economy and the implications for development management policy going forward;
- economic uncertainty in the rural land based economy (especially agriculture), diversification and policy implications; and
- changes in the retail sector and the policy implications for the nature and function of town centres.

Housing

3.5.26 There has been a reduction in the total number of dwellings completed (net) in 2019/2020, with 223 homes completed in the year ending 31 March 2020. This compares with 268 homes for 2018/19 and 291 homes completed in the 2017/18 monitoring year. The 223 completed dwellings per year is below the objectively assessed housing need of 290 dwellings per year identified in the 2017 Strategic Housing Market Assessment (SHMA).

3.5.27 The government published its first Housing Delivery Test (HDT) figures in February 2019, providing each planning authority with a percentage score for the period 2015-18, based on homes delivered against the government's calculation of housing need. The calculation of need is either based on adopted Local Plan housing targets where they are less than five years old, or the government's 'standard method' for calculating housing need where adopted plan targets are more than five years old. More information on the Housing Delivery Test can be found on the government's website³⁴.

3.5.28 Since the 2015-18 HDT result of 205% there have been two further published HDT figures:

- 2016-19 HDT: 175% (published February 2020)
- 2017-2020 HDT: 176% (published January 2021)

3.5.29 Local planning authorities must receive a score of 95% to pass the test and avoid sanctions. All of the housing delivery test scores for South Lakeland to date (as at March 2020) are above 95%. The latest delivery test score of 176% means that the Council is delivering significantly more homes than the government requires us to. It should be noted that this figure includes need and delivery figures for the whole district including the two national park planning authority areas. The Ministry of Housing Communities and

³⁴ <https://www.gov.uk/government/publications/housing-delivery-test-measurement-rule-book>

Local Government (MHCLG) does not have a method for providing HDT results for areas where district boundaries do not align with planning authority boundaries.

- 3.5.30 Of the total 223 homes completed (net) in 2019/20, 55% were built in the principal service centres of Kendal and Ulverston, and a further 31% were built in the key and local service centres. This aligns well with the Local Plan's policy approach to directing the majority of housing development to the most sustainable places.
- 3.5.31 25% of homes built in 2019/20 were on previously developed land. A total of 31% of homes were built on sites allocated for development in the Local Plan.
- 3.5.32 14% of the homes built were affordable. In looking just at major sites of ten homes or more 23% of all the homes built on large sites were affordable.
- 3.5.33 477³⁵ homes were granted permission in 2019/20, compared with 664 granted planning permission in 2018/19, 604 in 2017/18, 323 in 2016/17 and 556 in 2015/16. 53% of homes that were granted planning permission in 2019/20 were located in the principal service centres, and a further 35% were granted in key and local service centres, meaning that 88%³⁶ of residential permissions were in service centres.
- 3.5.34 12% of the homes permitted in the year were on previously developed land. Just over three quarters (77%) of the homes granted planning permission were on sites allocated for development in the Local Plan. 23% of the homes permitted will be affordable. In considering just sites of 10 units or more, 28% of the homes permitted will be affordable.
- 3.5.35 The National Planning Policy Framework (NPPF) requires planning authorities to identify and annually update a supply of specific deliverable sites sufficient to provide a minimum of five years' worth of housing against their housing requirements set out in adopted strategic policies, or against their local housing need where the strategic policies are more than five years old and need updating.
- 3.5.36 The Council published its five year land supply statement at the point of 31 March 2020 in September 2020 and in taking account of national policy and guidance it calculates the land supply against a local housing need figure using the national standard method, and applies an adjustment to remove need in the national park areas. It also provides a figure against the objectively assessed housing need (OAN) figure from the 2017 Strategic Housing Market Assessment (SHMA), which will be used to inform the Local Plan review and the new plan target.
- 3.5.37 Against a local housing need figure using the standard method and a national park adjustment (166 dwellings per year) the Council could demonstrate a 13.28 year land supply at 31 March 2020. Using the SHMA's OAN figure of 290 dwellings per year the Council could demonstrate a 6.80 year land supply. A summary of the Council's 5 year

³⁵ Total net number of housing units permitted = 477

³⁶ Percentages rounded up to whole numbers

supply position can be found in Appendix A of this report and the full statement can be found on our website³⁷.

- 3.5.38 The number of households grew between the 2001 and 2011 censuses and the average household size reduced slightly. The general trend over the last few years has been for greater proportions of households to rent their home. There has been a slight decrease in the proportion of dwellings that are unoccupied or being used as a second home in this monitoring period, falling from 7.02% in 2019 to 7.00% in 2020. The ratio of median house prices to household incomes by workplace reduced from 9.67 in 2017 down to 8.34 in 2018 but increased to 9.49 in 2019. This increase worsens housing affordability. The ratio in South Lakeland remains significantly above the comparable Cumbrian average of 5.74 and the North West average of 5.86.
- 3.5.39 Current issues that need to be taken account of in planning for housing include the district's ageing population and the need for more suitable homes for older people, an increasing number of smaller households, continuing affordability pressures, and the issue of second homes/ holiday homes in some areas of the district. In March 2019 the Council adopted its Development Management Policies DPD, which through Policy DM11 requires new homes to meet higher Building Regulations standards for accessibility and adaptability. The implementation of this policy will be reported on in future AMRs and a new indicator will be incorporated.
- 3.5.40 Following legislative and policy changes at a national level the Council now has duties to promote self-build and custom build housing and to support the provision of Starter Homes. [The Housing and Planning Act 2016](#) introduced a duty on local authorities to “give suitable development permission in respect of enough serviced plots of land to meet the demand for self-build and custom housebuilding in the authority's area arising in each base period”, and Councils are therefore now required to monitor self-build interest and activity. Because self-build homes are exempt from paying the Community Infrastructure Levy (CIL), the Council uses its CIL software to monitor self-build activity. As CIL only came into effect on 1st June 2015 the Council's self-build monitoring has commenced from that date. In the period 1st April 2019-31st March 2020 there were 28 self-build units permitted that were granted CIL exemptions. There were 9 entries added to the self-build register in the period, with the total number at 31st March 2020 being 64. The number of entries on the self-build register has been increasing year on year since monitoring commenced in 2015.

³⁷ <https://www.southlakeland.gov.uk/planning-and-building/south-lakeland-local-plan/evidence-studies-and-reports/#housingev>

Environment

- 3.5.41 It is important that planning policies guide development in such ways that it does not harm the ability of the environment to provide services such as fresh, clean water and air, and where possible, contributes to the improvement of our natural and built environment.
- 3.5.42 No planning applications were granted contrary to the advice of the Environment Agency on water quality grounds during the monitoring period. Two planning applications monitored by the Environment Agency were undetermined pending decision by the Council at the end of the monitoring period.
- 3.5.43 The Environment Agency has designed a flood defence scheme for the River Kent, and has completed a £9.5 million scheme at Town Beck in Ulverston. Flood risk and climate change remain a major challenge for the area. A planning application for Phase 1 of the Kendal Flood Risk Management scheme, comprising of linear defences along the rivers Kent and Mint was submitted in the 2018/2019 monitoring year and approved in June 2019.
- 3.5.44 The percentage of waste recycled or composted has increased since last year (from 44.3% to 45%), and the volume of household waste collected per household has fallen from 469kg to 462kg. Whilst planning policy has arguably only limited scope to impact on waste generation and recycling/composting rates, the design and layout of homes and influencing lifestyles can contribute to improvements.
- 3.5.45 The number of air quality monitoring sites breaching the air quality standards has remained low and static at 1 site (Lowther St, Kendal). There remains one air quality management area (AQMA) in the district, in Kendal town centre.
- 3.5.46 22,449³⁸ hectares of the South Lakeland planning authority area are designated as a Site of Special Scientific Interest (SSSI) and almost all of these areas (98.32%) are in a favourable or recovering condition.
- 3.5.47 Over the past monitoring year 1.576 Megawatts (MW) of renewable energy has been permitted. This increase is due in part to two granted prior approvals for roof mounted solar panels on SLDC Council assets and a proposal to retain biomass boilers at a farm Nr. Lupton. There has been no major schemes. The general trend in recent years, partly due to changes in national government policy to restrict onshore wind energy, has been for a decline in the amount of renewable energy schemes permitted. A planning appeal inquiry took place in January 2019 relating to an application to vary a temporary time condition for the wind turbines at Kirkby Moor wind farm. The decision notice was issued in July 2019 and the appeal was allowed, enabling the wind farm to continue generating renewable energy until 31 March 2027.

³⁸ Figure rounded up from 22,448.61143 hectares

- 3.5.48 In 2020 there were 15 designated heritage assets in the South Lakeland local planning area on Historic England's national risk register, comprising two listed buildings, twelve scheduled monuments and one conservation area (Burton-in-Kendal). A Partnership in Conservation Areas (PSiCA) project is underway to secure a three year vision and investment plan that will deliver enhancements and restoration in Burton-in-Kendal Conservation Area to enable it to be removed from the 'at risk' register.
- 3.5.49 There is a need to make progress on preparing management plans for our conservation areas. So far, draft management plans have been prepared for Burton-in-Kendal and Cartmel. Conservation area appraisals are also in need of updating. It is hoped the recent appointment of a Conservation Officer (in spring 2021) will enable progress on these matters, including consultation on and adoption of the draft management plans.
- 3.5.50 It would be beneficial to consider additional indicators to monitor environmental impacts of new development. This will be addressed alongside the development of new indicators to monitor the Development Management Policies document, which includes policies on aspects such as design that could be monitored qualitatively.

Transport, services and facilities

- 3.5.51 Car ownership remains higher than figures for the North West. A fluctuating number of people are working from home and the number travelling to work on foot or by bicycle increased since the 2001 census as shown in the 2011 census figures, and is about 8% higher than the NW average; however, there is also a marked increase in the proportion of people using private transport to get to work but a decrease in those using public transport. A high proportion of new homes built in the last year were built in Principal or Key Services centres (72%) where most services and facilities are located, compared to Local Service Centres and Rural Areas.
- 3.5.52 There is a need to find ways of enabling and encouraging more people to travel by sustainable and active means of transport through good design and policy as well as wider Council initiatives. There is an over-reliance on Census data for monitoring this topic area, which means updates are only available every 10 years. In light of this, new data has been used based on Department for Transport information. The latest information is from 2017 showing the % of population within 30 minutes of travel time to key services by walking or public transport. Levels of access to Secondary schools, Further education and GP services reduced in 2017 from previous years, otherwise levels of access to other services are broadly in the range of previous years.

Health and wellbeing

- 3.5.53 Data does not include the effects of the COVID-19 Pandemic, the 2020-2021 will reflect the impacts. Life expectancy remains higher than the national and Cumbrian figures, although local figures have been affected in line with the national picture during 2015, which saw over 28,000 more people dying than in 2014, the biggest year on year rise since 1967/68. This was enough to slightly reduce national life expectancies and was

thought to be at least in part due to a flu vaccine that proved less effective than usual coupled with increasing prevalence of dementia and related deaths. There have been no updates at local authority level since 2016/2018. Life expectancy at birth for both male and females decreased slightly in 2016-2018 compared to 2015-2017 figures for South Lakeland District.

- 3.5.54 In terms of deprivation, the 2019 Index of Multiple Deprivation ranked South Lakeland as the 250th most deprived local authority area (out of a total of 317), and the 2015 IMD ranked it 258th (out of a total of 326). South Lakeland can therefore be considered a relatively less deprived area at a national level. There are however small areas with concentrations of deprivation and some parts of Kendal and Ulverston fall within the 40% most deprived areas in the country. The relative affluence of South Lakeland overall often masks poverty and deprivation at localised scales and the Council currently has a programme of work around 'building financial resilience' to address poverty and economic disadvantage in the district.
- 3.5.55 Crime rates remain low compared to the Cumbrian averages, and there has been a decrease in levels compared to 2018-2019 levels
- 3.5.56 There has been a slight increase in the number of people with a limiting illness or disability between the 2001 and 2011 Censuses. It will be important to ensure that new development, through aspects such as design and layout, reinforces and enhances the area's high level of safety and good quality of life and that negative changes do not become trends.
- 3.5.57 There are several areas that it might be beneficial to monitor to help build a broader picture of health and wellbeing issues, such as green infrastructure provision but there are currently no mechanisms in place to monitor these.

4. Monitoring implementation of the Infrastructure Delivery Plan and Community Infrastructure Levy

4.1 Monitoring Infrastructure Delivery

- 4.1.1 In order to measure progress of the effective delivery of the Local Plan, it is essential that the Council has a mechanism in place to monitor and review the delivery of the infrastructure required to enable its implementation.
- 4.1.2 The South Lakeland Infrastructure Delivery Plan (IDP) was updated in August 2017 and approved by SLDC's Cabinet in September together with agreeing principles for assessing potential strategic infrastructure schemes to be funded from the growing CIL fund. It identifies the essential infrastructure required to enable the implementation of the Local Plan. It includes an Infrastructure Schedule identifying different types of infrastructure at a district and settlement level. The [IDP³⁹](#) is a 'live' document which will continue to evolve. The document will continue to be updated regularly to take account of changing circumstances and new requirements arising from Local Plan, in particular future needs arising from the outcomes of the emerging Local Plan review. These updates will be informed by the outcomes of close cooperation and engagement with infrastructure/ service providers, and also consultation with Town and Parish Councils.
- 4.1.3 From December 2020, local authorities have been required to publish an infrastructure funding statement (IFS). The IFS lists the infrastructure projects or types of infrastructure which may be funded or partly funded from CIL and replaces the CIL Regulation 123 List. It provides information on the monetary (and non-monetary) contributions sought and received from developers for the provision of infrastructure to support development in South Lakeland (outside of the Lake District National Park and Yorkshire Dales National Park), and the subsequent use of those contributions by South Lakeland District Council. The South Lakeland [IFS⁴⁰](#) covers the financial year 1 April 2019 to 31 March 2020.

Highways

- 4.1.4 A package of highway improvements in Kendal Town Centre is identified in the Kendal Transport Improvements Study, to which funding has already been allocated from the Cumbria Local Growth Fund. A key scheme was delivered in 2019-2020 the completion of the Shap Road Cycle Route.

³⁹ <https://www.southlakeland.gov.uk/media/4287/infrastructure-delivery-plan-august-2017.pdf>

⁴⁰ <https://www.southlakeland.gov.uk/media/7426/ifs-2019-20-web.pdf>

Kendal junction improvements

Location	Delivered / Underway
A5284 Sandes Avenue/Blackhall Road	On Hold
A6 Wildman Street/Ann Street and A6 Longpool/Station Road	Completed
A6 Highgate/Lowther Street	Delivered
A6 Milnthorpe Road/Romney Road	Delivered
Parkside Road/Valley Drive	Delivered
A684 Sedbergh Road/Sandylands Road	Delivered
Sandylands Road/Appleby Road junction	No longer being progressed

Kendal sustainable transport improvements

Location	Delivered, Underway or In-Pipeline
Pedestrian crossing improvements, Kendal Parks Road	Delivered
Pedestrian crossing improvements including pedestrian refuge, Heron Hill junction with Esthwaite Avenue	Delivered
Traffic calming incorporating speed cushions, Stainbank Road/Underwood	On Hold pending identification and securing of funding
Pedestrian refuge at junction of Vicarage Drive and Milnthorpe Road	Delivered
Improved surface for pedestrians. Garth Heads Lane	Delivered
North Kendal Cycle Route (Canal Head to Queen Katherine School)	Delivered
A65 Burton Road Cycle Route (Kirkbie Kendal School to Oxenholme)	Delivered
Pedestrian improvements incorporating footway widening, Spital Park/Appleby Road	Delivered
Traffic calming incorporating speed cushions, Valley Drive	No longer being progressed
Pedestrian improvements incorporating footway widening, Parkside Road/Castle Rise	Delivered

Ulverston – strategic access improvements to employment and housing

4.1.5 Funding allocated through Local Growth Deal unless specified.

Scheme	Delivered, Underway or In-Pipeline	Funding source
A590/ North Lonsdale Terrace – junction improvements and traffic management improvements on North Lonsdale Terrace	No longer being progressed	Identified as part of Ulverston Transport Infrastructure Study but requires detailed design work and costing before can be taken forward
A590/Daltongate improvements (access improvements to Lightburn Road employment site)	Underway	Construction and signalisation phasing / timings complete. Adoption by Cumbria County Council and Highways England being progressed
A590 / A5087 Quebec Street improvement (signalised junction)	Delivered	Local Growth Fund
A590 / Ellers Roundabout improvements – signal improvements to improve the efficiency of the junction	On Hold	Identified as part of Ulverston Transport Infrastructure Study but requires detailed design work and costing before can be taken forward
A590 / Prince's Street junction – improvements to the signalised junction to improve the efficiency of the junction	On Hold	Identified as part of Ulverston Transport Infrastructure Study but requires detailed design work and costing before can be taken forward
Sustainable Transport Improvements		Funded through developer contributions – site specific measures (although it may be possible for CIL eligible schemes to be identified in the IDP)

Cross-a-Moor, Swarthmoor junction improvements

- 4.1.6 In addition to the above, it has been identified that improvements are needed to the Cross-a-Moor junction in Swarthmoor in order to enable the delivery of significant housing development at Croftlands and Cross-a-Moor. A roundabout was identified as the most appropriate solution for this junction. The roundabout will support the delivery of more than 1,000 new houses. Work is expected to start in September 2021 on the Cross-a-Moor roundabout on the A590 just south of Swarthmoor.

- 4.1.7 No progress has taken place regarding access improvements for the sites at Land adjacent to Mainline Business Park, Milnthorpe, Scroggs Wood, Kendal, Land at Burton Road, Kendal, or A590 / Canal Head junction improvements, Ulverston, Canal Head Business Park and Employment Regeneration Area, Ulverston. A planning application has been approved on part of the employment land allocation land north of Gatebeck Lane, which includes appropriate site access into the site.

Public realm/historic environment and heritage projects

- 4.1.8 In addition to the above, a number of infrastructure schemes have also been delivered or are being progressed, mainly in relation to public realm and open space projects. Landscaping work has taken place at New Road common land in Kendal. The Cartmel townscape initiative works have also been completed. The public realm improvement scheme to enhance the Square in Burton-in-Kendal achieved practical completion in March 2020, although some remedial work is outstanding.
- 4.1.9 Improvements to the Grange Lido and promenade are phased to take place over the next three years. A Kendal Flood Risk Management Scheme will also be delivered. Improved walking and cycling infrastructure to improve connectivity across Morecambe Bay is also a priority.

Open space projects

- 4.1.10 Improvements to a number of public open spaces and play areas have taken place in the last year. A new playground was opened in September 2019 at Abbot Hall, Kendal. Other works include the installation of adult gym equipment close to the Beck Centre in Kendal and the continuation of work at Nobles Rest with the Friends Group to plant up the central beds with perennial plants. Work has also been carried out in Swine Parrock to remove the under growth. This has encouraged the growth of bluebells and daffodils. The Friends of Fletcher Park have planted trees and additional play equipment has been installed at the Castle play area, Kendal.

4.2 Community Infrastructure Levy

- 4.2.1 The Council introduced a Community Infrastructure Levy with effect from 1 June 2015 to help deliver the infrastructure required (as set out in the IDP) to facilitate development. Information on the receipt and expenditure of CIL in 2019/20 can be found in full in the [Infrastructure Funding Statement](#) and a brief summary is provided below:

CIL Headline Figures 2019/20

Item	Amount
CIL invoiced (set out in Demand Notices) in 2019/20	£1,125,282.38

Item	Amount
CIL receipts received in 2019/20	£778,228.26
CIL receipts that CIL regulations 59E and 59F apply to (funds received and retained for Parish Meetings)	£209.62
CIL expenditure in 2019/20 (as passed to Parish and Town Councils and CIL Admin)	£153,951.67
CIL retained at end of 2019/20 (from all CIL income prior to April 2020, as retained for Strategic CIL, CIL Admin and areas with Parish Meetings)	£1,185,120.93

4.3 Planning Obligations / Section 106 Contributions

- 4.3.1 Full details of developer contributions that have been agreed in 2019/20, monies that have been received and spent and infrastructure projects that have been delivered can be found in Section 3 of the [Infrastructure Funding Statement⁴¹](#).
- 4.3.2 A brief summary of the headline figures can be viewed below:

Planning Obligations Headline Figures 2019/20

Item	Amount
Total money to be provided through planning obligations agreed in 2019/20	£406,739.54
Total money received through planning obligations (whenever agreed) in 2019/20	£47,575.28
Total money , received through planning obligations (whenever agreed), spent in 2019/20	£118,069.04
Total money , received through planning obligations (whenever agreed), retained at the end of 2019/20 (excluding “commuted sums” for longer term maintenance).	£564,224.59
Total money , received through planning obligations (whenever agreed), retained at the end of 2019/20 as “commuted sums” for longer term maintenance.	£0

⁴¹ <https://www.southlakeland.gov.uk/media/7382/ifs-2019-20-web.pdf>

Item	Amount
Total number of affordable housing units to be provided through planning obligations agreed in 2019/20	103
Total number of affordable housing units which were provided through planning obligations (whenever agreed) in 2019/20	34
Total number of school places for pupils to be provided through planning obligations agreed in 2019/20	0
Total number of school places for pupils which were provided through planning obligations (whenever agreed) in 2019/20	0

5. Duty to Co-operate and Joint Working

- 5.1.1 The South Lakeland Local Plan area is bordered by parts of South Lakeland that fall within National Parks and are covered by Local Plans for the Lake District and Yorkshire Dales National Parks. South Lakeland District as a whole borders Barrow and Copeland Boroughs to the west, Lancaster District to the south, Allerdale Borough and Eden District to the north and Richmondshire and Craven Districts to the east. Paragraph 5.1.4 below – Strategic Policies, provides an up to date position on the status of Local Plan documents adopted or in production by neighbouring local planning authorities.
- 5.1.2 The Localism Act sets out the legislative basis for local authorities and other public bodies to have a ‘duty to co-operate’ in the preparation of planning documents. The duty is to ‘engage constructively, actively and on an on-going basis’ over matters that would have a significant impact on at least two planning areas, or in connection with infrastructure that is strategic.
- 5.1.3 This section provides a means for the Council to report on progress of such co-operation in terms of the preparation of various planning documents including updates to the Infrastructure Delivery Plan (IDP). The Council consults with key service/infrastructure delivery partners to inform updates to the IDP, and meets providers on other occasions where necessary. In addition, meetings have been held or are planned with neighbouring authorities and the Duty to Co-operate bodies as required. For example neighbouring authorities and statutory bodies have been consulted on CIL, Development Briefs and the AONB and Development Management Policies DPDs.
- 5.1.4 Key cross boundary issues requiring cooperative working include:
- **Housing Market Areas:** the South Lakeland Local Plan area contains the whole of the Kendal Housing Market Area, a small segment of the Dales Housing Market Area, and parts of Rural Kendal, Grange/Cartmel and Furness Housing Market Areas. The Council engaged with the Lake District and Yorkshire Dales National Parks in preparing the 2017 Strategic Housing Market Assessment (SHMA).
 - **Economy:** the Local Plan area lies within the area of the Cumbria Local Enterprise Partnership (LEP). The LEP have submitted the March 2019 Cumbria Local Industrial Strategy (CLIS) to government for approval. The LEP has also published a Cumbria Infrastructure Plan (May 2016) and other strategy documents.

There are significant travel to work movements in both directions between South Lakeland, Lancaster and Barrow, with 96% of the workforce both living and working within this geography. The Council is working in partnership with Lancaster City Council and Barrow Borough Council to increase the prosperity of the Lancaster and South Cumbria Economic Region. The three councils are working collaboratively to develop a more sustainable economy and jointly promote the area as a place to live, study and build a career. This joint approach has the intention of stimulating greater economic success and prosperity for businesses and residents across Morecambe

Bay, unlocking investment opportunities and bringing employment into the area.

The partnership launched a shared economic prospectus in 2019 outlining key strengths and opportunities. In 2020 it published [The Bay Prosperity and Resilience Strategy](https://committeeadmin.lancaster.gov.uk/documents/s77945/The%20Bay%20Resilience%20and%20Prosperity%20Strategy%20-%20September%202020.pdf)⁴².

- **Retail:** the South Lakeland Retail Study identifies Kendal as the main comparison shopping centre for most of the Local Plan area. Ulverston and Furness have a close relationship with Barrow. Lancaster and Carnforth exert some influence on the Burton and Holme areas.
- **Infrastructure:** South Lakeland is on a major infrastructure corridor which includes the West Coast Main Line, the M6 and national electricity, gas and water infrastructure including the Thirlmere and Haweswater aqueducts. A 'West of M6 Strategic Connectivity Study' was commissioned by the Cumbria Local Enterprise Partnership and Highways England in 2016 to examine the issues and constraints associated with the strategic road connectivity across the County to the west of the M6. The Kendal Highways and Transport Improvement Study was published in October 2019 identifying road and sustainable transport options to improve the efficiency of the Kendal town road network and promote sustainable travel (walking and cycling).
- **Health:** Westmorland General Hospital in Kendal is part of the University Hospitals of Morecambe Bay NHS Trust which operates larger hospitals in Lancaster and Barrow as well as community health resource centres at Morecambe and Ulverston. Lancaster and Barrow Hospitals provide a number of services not currently provided within the district including emergency services.
- **Environment:** Two National Parks and one Area of Outstanding Natural Beauty as well as several national and international biodiversity designations create linkages as they fall on or adjacent the district's boundaries. A National Park Extension Order took effect on 1 August 2016, taking areas of land at Brigsteer/The Lyth valley and near Selside into the Lake District National Park and much of the Lune Valley area, including the villages of Casterton and Barbon into the Yorkshire Dales National Park.
- **Climate change:** South Lakeland District, Lancaster City Council and Barrow Borough Council all have coastline around Morecambe Bay. There is a need to manage coastal change (flooding/erosion) across local authority and land/sea boundaries to ensure the effective alignment of terrestrial and marine planning. Within South Lakeland District, there are a number of coastal settlements e.g.

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<https://committeeadmin.lancaster.gov.uk/documents/s77945/The%20Bay%20Resilience%20and%20Prosperity%20Strategy%20-%20September%202020.pdf>

Ulverston, Grange-over-Sands, Arnside, Greenodd, Kirkby-in-Furness and the southern part of Flookburgh. There is also key coastal strategic infrastructure on or close to the coast, including the Furness Railway and parts of the A590 and the Furness coastal road.

- **Strategic Policies:** Lancaster, Eden and the Lake District National Park all have adopted Local Plan Core Strategies which make provision for development needs within these areas up until at least 2021. Lancaster City Council is in the final stages of preparing its new Local Plan (2020 – 2031) which includes a Strategic Policies and Land Allocations DPD and a review of its Development Management Policies DPD. Examination in public hearing sessions took place in the spring of 2019. Eden's Local Plan (2014 – 2032) was adopted in 2018. An early review of its Plan is expected to commence in 2020. The Lake District National Park also has an adopted Land Allocations document and has commenced work on a new single Local Plan (2020 – 2035) which is nearing its final stage. Examination in public hearing sessions took place in the autumn/winter of 2019. The Yorkshire Dales National Park Authority adopted its single Local Plan (2015 – 2030) in December 2016 (which covers the 'pre-August 2016' National Park area). It's now in the early stages of reviewing its Plan with a single Local Plan (2023 – 2040). Copeland's Core Strategy and Development Management Policies document was adopted in December 2013. A single Local Plan (2017 – 2035) is now being prepared. The Issues and Options public consultation took place between November 2019 and mid-January 2020. A Preferred Options Draft of the Local Plan is expected to be published in the autumn of 2020. Barrow adopted its new Local plan (2016 – 2031) in 2019.

5.1.5 Some key formal arrangements for co-operation include:

- **Arnside and Silverdale AONB Partnership:** covers parts of both South Lakeland and Lancaster Districts. South Lakeland, along with Lancaster City, the two County Councils and the Parish Councils is a member of the Partnership and is represented at member level on the Executive Committee and at the officer group.
- **Cumbria Local Enterprise Partnership:** South Lakeland and Barrow Borough share a seat on the board of the 'new' Local Authority led LEP Scrutiny Board. SLDC's Leader alternates with the Leader of Barrow on an annual basis. On the same basis Carlisle and Eden and Copeland and Allerdale also alternate. LDNP and CCC have individual, permanent representation.
- **Cumbria Local Enterprise Partnership Technical Officers Group:** A group on which all districts, including LDNP and CCC but excepting YDNP, are represented and which advises the Local Enterprise Partnership executive.
- **Cumbria Housing Group:** a forum with representation at member level from all local authorities and national park authorities. It has two sub-groups: Housing Supply and Housing & Wellbeing which includes housing providers. A key function is the preparation, co-ordination and review of the Cumbria Housing Statement which forms a co-ordinated strategic basis for district housing strategies. The six districts

and most housing associations in Cumbria co-operate in the implementation of Cumbria Choice – a county-wide choice based letting system.

- **Zero Carbon Cumbria Partnership:** South Lakeland is a partner with nearly 70 other organisations working together to make Cumbria the first carbon-neutral county in the UK by 2037.
- **Pilot Cumbria Local Nature Recovery Strategy:** South Lakeland along with all other Cumbria Local Planning Authorities is in partnership with other Nature Conservation partners including Natural England and the Local Nature Partnership to prepare a Pilot Local Nature Recovery Strategy for Cumbria funded by DEFRA. The aim of the pilot is to inform a template for the future roll out of LNRS which are expected to be conducted at a County Level, as envisaged in the impending Environment Bill. The purpose of the LNRS is to restore and link up habitats to inform nature recovery.

6. Looking Ahead: Local Plan Review, Future Evidence, Monitoring and Resources

6.1 Local Plan Review

- 6.1.1 The NPPF states that policies in Local Plans should be reviewed to assess whether they need updating at least once every five years and no later than five years from the adoption date of the plan, and should then be updated as necessary. Reviews should take into account changing circumstances affecting the area, changes in local housing need, or any relevant changes in national policy.
- 6.1.2 South Lakeland's strategic planning policies (including its housing and employment land requirement policies) are generally contained within the Core Strategy DPD which was adopted in 2010, and its Land Allocations DPD was adopted in 2013. It is therefore clear that these DPDs need to be reviewed.
- 6.1.3 The Council has recently commenced the [review of its Local Plan](#)⁴³ and is currently revising its Local Development Scheme to confirm the timetable for the update of the plan. We are at an early stage of scoping issues and options and evidence base preparation. We have begun to [review our existing policies](#)⁴⁴ to understand the extent to which they may require updating in order to:
- bring them into line with the 2019 National Planning Policy Framework
 - reflect new evidence base and updated requirements
 - reflect changes in local circumstances and priorities
- 6.1.4 From our early assessment and early engagement activities in early 2020 we consider the following policy areas to be the priority areas for review and potential update:
- **Spatial strategy** – we need to review whether our overall spatial strategy and distribution of development across the district remains appropriate.
 - **Housing requirement and land supply**– we need to update the Local Plan housing requirement to reflect up to date evidence on housing need, and review our existing allocations to ensure they are deliverable.
 - **Affordable housing and types and mix of housing** – we need to review whether our current policies on affordable housing and the mix of housing remain appropriate in light of updated evidence.
 - **Employment land requirements and supply, and strategy for delivering sites** – we need to update our evidence on employment land needs and update our

⁴³ <https://www.southlakeland.gov.uk/planning-and-building/south-lakeland-local-plan/local-plan-review/>

⁴⁴ See draft policy review document February 2020, at: <https://www.southlakeland.gov.uk/media/7084/draft-policy-review-document.pdf>

approach to delivering employment sites, including reviewing current allocations to ensure that sites are suitable, available and achievable. We also need to review our policy on existing employment areas.

- **Town centres and retail policy** – we need to review whether our policies relating to town centres and retail development are still appropriate to address the challenges facing our high streets.
- **Climate crisis** – we need to review our policies relating to climate change mitigation and adaptation to ensure they reflect updated evidence on climate change impacts and the Council's new policy on climate change action.
- **Green infrastructure, open space and biodiversity** – we need to update our open space and green infrastructure evidence base, and use this to inform an update of relevant policies. We also need to consider whether any updates are required in relation to biodiversity net gain.

6.1.5 The Development Management Policies DPD was adopted in March 2019 and is unlikely to need any significant review. It is proposed at this stage that the Development Management policies will be updated where necessary and will be combined into a single Local Plan together with revised policies from the Core Strategy and Land Allocations DPDs.

6.1.6 We are not proposing to review the Arnside and Silverdale AONB Local Plan given its recent adoption in March 2019 and this will remain as a separate DPD, although some of the revised policies in the updated single Local Plan will apply in the AONB.

6.2 Evidence base

6.2.1 A substantial evidence base underpins the Council's Local Plan and is continually being reviewed to ensure it remains up to date. New evidence was prepared to support the Arnside and Silverdale AONB and Development Management DPDs, including a new district wide viability study. A new Strategic Housing Market Assessment was published in October 2017 to provide an up to date assessment of housing need.

6.2.2 Work is commencing on the new Local Plan and this will involve significant updates to the evidence base. The table below sets out key elements of the current evidence base that the Council plans to review soon and identifies when each was prepared or last reviewed and when we plan to update it. A fuller list of the evidence base supporting the Local Plan can be found on the Council's Local Plan webpages.

Key evidence base documents that are currently being prepared or updated or for which there are plans to update

Evidence	Date prepared or last reviewed	Date proposed to review
Strategic Housing Market	2017	A new SHMA was published in October

Evidence	Date prepared or last reviewed	Date proposed to review
Assessment and review of Objectively Assessed Need		2017 and provides an objective assessment of housing need for plan making purposes. The SHMA will be kept under review as work on the new Local Plan progresses. It is proposed that a combined assessment of housing and employment needs (a Strategic Housing and Economic Needs Assessment – 'SHENA') will be prepared to inform the Local Plan Review.
District Wide Viability Study	2017	A new district wide viability study was published in September 2017 to support the Arnsdale and Silverdale AONB and DM Policies DPDs. Key inputs and assumptions will be kept under review as the Local Plan progresses (e.g. build costs, sales values etc.) and the study will be updated as and when required.
Strategic Housing Land Availability Assessment	2009	A consultation on the methodology for a new SHLAA took place in early 2020 followed by a Call for Sites in summer 2020. The assessment of housing land is now being combined with economic land and a draft Strategic Housing and Economic Land Availability Assessment (SHELAA) is underway.
Employment Land and Premises (floorspace) Review	2012	A new Strategic Housing and Employment Needs Assessment (SHENA) will be commissioned for South Lakeland in 2021. A Cumbria County wide strategic employment site study, led by the Cumbria Local Enterprise Partnership and Cumbria County Council is nearly completed. The assessment of the suitability of existing employment allocation sites together with suggested sites put forward as part of the Local Plan review 'Call for Sites' process will be assessed in a Strategic Housing and Economic Land Availability Assessment (SHELAA).
Gypsy and Traveller Accommodation Assessment (GTAA)	2013	An update to the GTAA was commissioned in 2020 working jointly with other Cumbrian authorities. The study is in preparation. Publication of the updated Cumbria GTAA is expected during the second half of 2021.
Strategic Flood Risk Assessment	2007	A new level 1 SFRA is underway which

Evidence	Date prepared or last reviewed	Date proposed to review
(SFRA)		was jointly commissioned with Allerdale, Copeland and the Lake District National Park authorities. South Lakeland's part of the study is currently on hold, awaiting updated flood model outlines from the Environment Agency and is expected to recommence in the summer of 2021 when the data should be available.
Retail and Leisure Study	2012	To be commenced in 2021 /2022.
Green Infrastructure and Open Space	2008	To be commenced in 2021.

6.3 Future monitoring requirements

- 6.3.1 The Council will continue to monitor progress on the implementation of the Local Plan and Community Infrastructure Levy. There will also be a need in the future to monitor progress of other plans and policies including various Neighbourhood Plans, and the new single Local Plan.
- 6.3.2 The Council will continue to work to improve the efficiency and effectiveness of monitoring systems and to further develop the evidence base for the Local Plan. The existing monitoring framework presents current data for as many indicators as possible; but there remain areas where a lack of accessible, up-to-date data limits the comprehensive monitoring of all policy areas. Some data is simply not available, and others are not available for the Local Plan area rather than the whole district. Also, in some cases quantitative indicators do not adequately help us monitor the outcomes that are being achieved through the planning system. The Royal Town Planning Institute commissioned research⁴⁵ to understand how spatial planning outcomes can be effectively measured and the Council will consider the outputs of this research which include a handbook and toolkit and consider whether they can be used to further improve our monitoring work. The findings of this research can be viewed [here](#)⁴⁶.
- 6.3.3 New planning software is also being developed for the Council which should improve the functionality of the system in monitoring the implementation of planning policies by enabling more automated reporting. We will also closely follow national developments in digital planning that may offer further opportunities for technological improvements locally, for example those being led by [Future Cities Catapult](#)⁴⁷, and the initiatives being led by the 'digital land' section of MHCLG.

⁴⁵ <https://www.rtpi.org.uk/research/2020/november/measuring-what-matters-planning-outcomes-research/>

⁴⁶ <https://www.rtpi.org.uk/research/2020/november/measuring-what-matters-planning-outcomes-research/>

⁴⁷ <https://futurecities.catapult.org.uk/project/future-of-planning/>

- 6.3.4 Future monitoring requirements may arise due to new government requirements, with a recent example being the need to monitor self-build housing permissions. There are likely to be new monitoring requirements around areas such as biodiversity net gain.

6.4 Resources

- 6.4.1 Following a Council restructure, the following posts are in place in relation to Local Plan Policy work:
- Strategy Lead Specialist
 - Senior Specialist (Strategy)
 - 3 x Specialist (Strategy)
 - Case Management Officer (Technician)
- 6.4.2 Since March 2018, the Development Strategy Delivery Officer and a support assistant have left the Council. They have not been replaced.
- 6.4.3 The Strategy Lead Specialist deals mainly with corporate policy matters.

Appendix A: Five Year Land Supply and Housing Trajectory

Five Year Land Supply

The Council's five year housing land supply assessment is set out in the [Housing Land Annual Position Statement](#), published in September 2020. Measured against local housing need using the standard method, the Council has 13.28 years of deliverable housing land at the date of 31 March 2020.

Step	Description	Calculation	Figure
a)	Local Housing Need 2020-2030	166x10	1660
b)	Plus 5% buffer over period	1660x1.05	1743
c)	Annual requirement	b/10	174.3
d)	5 year requirement	xxxxx5	871.5
e)	Deliverable land supply	units	2315
f)	Land supply in years	e/c	13.28

Housing Trajectory 2020-25

Planning Permissions – Large Sites (10+ dwellings)

Sites under construction

Site Name	Town	Total Outstanding (Net)	2020/21	2021/22	2022/23	2023/24	2024/25	NPPF Deliverable Units 5 year
Land South of Green Lane	Allithwaite	22	11	11	-	-	-	22
East of Hutton Close (Church Bank)	Burton-in-Kendal	12	12	-	-	-	-	12
Greenside Farm	Hincaster	14	-	3	3	4	4	14
K Village, Lound Road	Kendal	88	22	22	22	22	-	88
Sawyers Arms, Stricklandgate	Kendal	12	-	12	-	-	-	12
South of Lumley Road	Kendal	99	25	25	25	24	-	99
West of Oxenholme Road - Phase 2	Kendal	38	24	10	-	-	4	38
West of Oxenholme Road – Phases 3&4	Kendal	49	-	-	24	25	-	49
Land North of Kendal Road	Kirkby Lonsdale	52	25	25	2	-	-	52
Land South of Fell Close	Oxenholme	104	24	40	40	-	-	104
Stone Cross Mansion	Ulverston	15	15	-	-	-	-	15
Fair View, Daltongate, Ulverston	Ulverston	12	2	10	-	-	-	12
South of Lund Farm (John Barrow Way)	Ulverston	81	24	24	24	9	-	81
Ulverston Town Hall	Ulverston	17	17	-	-	-	-	17
		615	201	182	140	84	8	615

Sites with full planning permission

Site Name	Town	Total Outstanding (Net)	2020/21	2021/22	2022/23	2023/24	2024/25	NPPF Deliverable Units 5 year
North of Sycamore Close	Endmoor	106	-	-	30	30	30	90
South of Underbarrow Road - East B	Kendal	15	-	-	-	-	-	0
South of Underbarrow Road - West	Kendal	84	-	20	20	20	20	80
Gascow Farm	Ulverston	235	-	15	30	30	30	105
West End Nursery	Ulverston	86	-	-	30	30	26	86

Site Name	Town	Total Outstanding (Net)	2020/21	2021/22	2022/23	2023/24	2024/25	NPPF Deliverable Units 5 year
		526	0	35	110	110	106	361

Outline Permission

Site Name	Town	Total Outstanding (Net)	2020/21	2021/22	2022/23	2023/24	2024/25	NPPF Deliverable Units 5 year
Land off Cross-a-Moor	Swarthmoor	27	-	-	-	-	-	0
Nook Farm (Croftlands West)	Ulverston	266	-	-	-	30	30	60
Depot on north side of Parkside Road	Kendal	42	-	-	-	-	-	0
Sub Total	N/A	335	0	0	0	30	30	60

Planning Permissions – Small Sites (less than 10 dwellings)

Supply	Total Outstanding (Net)	2020/21	2021/22	2022/23	2023/24	2024/25	NPPF Deliverable Units 5 year
Under Construction	114	57	57	-	-	-	114
Not Started (35% discount for 5 year supply)	259	-	-	56	56	56	168
Sub Total	373	57	57	56	56	56	282

Unconsented Land Allocations

Site Name	Town	Total Outstanding (Net)	2020/21	2021/22	2022/23	2023/24	2024/25	NPPF Deliverable Units 5 year
Land Rear of Bankfield	Allithwaite	9	-	-	-	-	-	0
Land Rear of Barn Hey	Allithwaite	30	-	-	15	15	-	30
Land to Rear of Almond Bank	Allithwaite	11	-	-	-	-	-	0
Land off Queen's Drive	Arnside	6	-	-	-	-	-	0
Land on Hollins Lane	Arnside	6	-	-	-	-	-	0
Land on Briery Bank	Arnside	8	-	-	-	-	8	8
Land East of Foxfield Road	Broughton-in-Furness	16	-	-	-	8	8	16
Land adjacent to Hall Park	Burneside	70	-	-	-	-	30	30
Village Recreation (Willink) Field and Tennis Courts	Burneside	23	-	-	-	8	15	23
East of Boon Town	Burton-in-Kendal	28	-	-	14	14	-	28
Green Dragon Farm	Burton-in-Kendal	86	-	-	-	-	-	0
Land at Hags Lane	Cartmel	39	-	-	19	20	-	39
Stables, Cartmel Racecourse	Cartmel	15	-	-	-	-	-	0
South of Bowling Green	Endmoor	25	-	-	-	-	-	0
East of Manorside	Flookburgh	30	-	-	-	-	-	0
Land East of Winder Lane	Flookburgh	17	-	-	-	-	-	0
North of Allithwaite Road	Flookburgh	24	-	-	-	-	-	0
Berners Pool	Grange-over-Sands	60	-	-	-	-	-	0
Guide's Lot	Grange-over-Sands	16	-	-	-	-	-	0
Opposite Low Fell Gate Farm	Grange-over-Sands	46	-	-	-	12	12	24
South of Allithwaite Road, Kents Bank	Grange-over-Sands	202	-	-	20	20	20	60
West of Cardrona Road	Grange-over-Sands	28	-	-	-	-	-	0
Mid-Town Farm	Great/Little Urswick	27	-	-	-	13	14	27
Land at the Old Vicarage	Greenodd/Penny Bridge	21	-	-	-	-	-	0
East of Milnthorpe Road	Holme	73	-	-	15	15	15	45
West of Burton Road	Holme	59	-	-	-	-	-	0
East of Castle Green Road	Kendal	60	-	-	-	-	-	0
Land at Kendal Parks Farm	Kendal	95	-	-	-	-	25	25

Site Name	Town	Total Outstanding (Net)	2020/21	2021/22	2022/23	2023/24	2024/25	NPPF Deliverable Units 5 year
(South)								
Land at Kendal Parks Farm (North) Phase 3	Kendal	33	-	-	16	17	-	33
North of High Sparrowmire	Kendal	25	-	-	12	12	-	24
North of Laurel Gardens	Kendal	157	-	-	25	25	25	75
South of Underbarrow Road - East A	Kendal	19	-	-	-	-	19	19
Stainbank Green Phase 1 (Brigsteer Road site)	Kendal	34	-	-	-	17	17	34
Stainbank Green - Phase 2 onwards	Kendal	155	-	-	-	-	-	0
West of High Sparrowmire	Kendal	150	-	-	-	25	25	50
West of Valley Drive	Kendal	35	-	-	-	10	25	35
Four Lane Ends	Kirkby-in- Furness	11	-	-	-	-	-	0
Land Adjacent to Burlington C of E School	Kirkby-in- Furness	46	-	15	15	16	-	46
Land south and east of Milnthorpe	Milnthorpe	155	-	-	-	-	25	25
West of Sedgwick Road	Natland	28	-	-	-	14	14	28
AS25 Land on Sandside Road and Quarry Lane	Sandside/ Storth		-	-	-	-	-	0
Land off Cross-a-Moor	Swarthmoor	140	-	-	-	-	-	0
Croftlands East	Ulverston	330	-	-	-	-	-	0
Morecambe Road Scrapyard	Ulverston	12	-	-	-	-	-	0
Nook Farm (Croftlands West-Site adjacent Urswick Rd)	Ulverston	18	-	-	9	9	-	18
North of Watery Lane	Ulverston	28	-	-	-	8	10	18
North Urswick Road	Ulverston	48	-	-	-	-	-	0
West End Farm	Ulverston	97	-	-	-	-	-	0
		2651	0	15	160	278	307	760

Additional Windfall

Site Name	Total Outstanding (Net)	2020/21	2021/22	2022/23	2023/24	2024/25	NPPF Deliverable Units 5 year
<i>Small Site Allowance</i>	133	26	26	27	27	27	133
<i>Large Site Allowance</i>	104	0	0	0	41	63	104
<i>Sub Total</i>	237	26	26	27	68	90	237

Total

Five Year Supply	2020/21	2021/22	2022/23	2023/24	2024/25	NPPF Deliverable Units 5 year
TOTAL	284	315	493	626	597	2315

Appendix B: Housing Delivery Record

Delivery against Core Strategy Housing Requirement 2003-16

Year	Cumulative Requirement	Completions	Cumulative Completions	Variance
2003/4	400	221	221	-179
2004/5	800	232	453	-347
2005/6	1200	303	756	-444
2006/7	1600	238	994	-606
2007/8	2000	156	1150	-850
2008/9	2400	155	1305	-1095
2009/10	2800	282	1587	-1213
2010/11	3200	103	1690	-1510
2011/12	3600	148	1838	-1762
2012/13	4000	206	2044	-1956
2013/14	4400	112	2156	-2244
2014/15	4800	256	2412	-2388
2015/16	5200	370	2782	-2418

Delivery against Objectively Assessed Need as calculated in the 2017 Strategic Housing Market Assessment (which provides an OAN for the new plan period 2016-2036)

Year	Cumulative Requirement	Completions	Cumulative Completions	Variance
2016/17	290	245	245	-45
2017/18	580	291	536	-44
2018/19	870	268	804	-66
2019/20	1160	223	1027	-133

Note: The target of 400 dwellings per annum (2003-25) in the adopted Core Strategy is considered to be in need of updating, given that it is based on the now revoked Regional Spatial Strategy. It should be noted that the latest Strategic Housing Market Assessment (SHMA, published in October 2017) identifies an objectively assessed housing need (OAN) of 290 dwellings per annum for the new plan period 2016-36. The SHMA was endorsed by the Council's Cabinet on 29 November 2017. This figure will inform plan making and the review of the Local Plan.

Delivery against the Government's assessment of local housing need – the Housing Delivery Test

The Housing Delivery Test is a new measurement introduced by the Government in 2018 to measure local planning authorities' performance in delivering new homes to meet local housing need. It is expressed as a percentage of homes delivered against homes needed.

The result of the Housing Delivery Test affects the buffer that local planning authorities should add to their housing requirement for the purposes of calculating their five year supply. Where delivery of housing falls below 85% a buffer of 20% is needed on the housing requirement.

The calculation below shows how South Lakeland's first Housing Delivery Test result was calculated. Further information on the methodology can be found in the following Government publication:

- [Housing Delivery Test 2020: Measurement Technical Note](#)

The need figure is based on the formula provided by the government, based on household projections. Both need and delivery figures are based on the whole of South Lakeland district including parts of the national parks, so cover a wider area than the Local Plan area.

Year	Need	Delivered	Variance
2017-18	160	354	194
2018-19	212	326	114
2019-20	176	281	105
Total	547	961	414

HDT Result: $961 / 547 \times 100 = 176\%$

Given the Council's Housing Delivery Test Result, it can be concluded that a 5% buffer on the housing requirement is sufficient for the purposes of calculating a five year land supply.

Appendix C: Glossary

Affordable Housing: Housing for sale or rent, for those whose needs are not met by the market (including housing that provides a subsidised route to home ownership and/or is for essential local workers); and which complies with one or more of the following directions:

- a) **Affordable housing for rent:** meets all of the following conditions: (a) the rent is set in accordance with the Government's rent policy for Social Rent or Affordable Rent, or is at least 20% below local market rents (including service charges where applicable); (b) the landlord is a registered provider, except where it is included as part of a Build to Rent Scheme (in which case the landlord need not be a registered provider); and (c) it includes provisions to remain at an affordable price for future eligible households, or for the subsidy to be recycled for alternative affordable housing provision. For Build to Rent Schemes affordable housing for rent is expected to be the normal form of affordable housing provision (and, in this context, is known as Affordable Private Rent).
- b) **Starter homes:** is as specified in Sections 2 and 3 of the Housing and Planning Act 2016 and any secondary legislation made under these sections. The definition of a starter home should reflect the meaning set out in statute and any such secondary legislation at the time of plan preparation or decision making. Where secondary legislation has the effect of limiting a household's eligibility to purchase a starter home to those with a particular maximum level of household income, those restrictions should be used.
- c) **Discounted market sales housing:** is that sold at a discount of at least 20% below local market value. Eligibility is determined with regard to local incomes and local house prices. Provisions should be in place to ensure housing remains at a discount for future eligible households.
- d) **Other affordable routes to home ownership:** is housing provided for sale that provides a route to ownership for those that could not achieve home ownership through the market. It includes shared ownership, relevant equity loans, other low cost homes for sale (at a price equivalent to at least 20% below local market value) and rent to buy (which includes a period of intermediate rent). Where public grant funding is provided, there should be provisions for the homes to remain at an affordable price for future eligible households, or for any receipts to be recycled for alternative affordable housing provision, or refunded to Government or the relevant authority specified in the funding agreement.

Annual Monitoring Report: Annual publication that is part of the South Lakeland Local Plan and which assesses progress in implementing the Local Development Scheme and the extent to which policies in Local Plan development plan documents (DPDs) are being implemented successfully.

AONB DPD: 'Area of Outstanding Natural Beauty Development Plan Document' - identifies sites on which new housing and employment development can take place and provides

policies for managing development in a way that properly reflects the purposes of AONB designation.

Area Action Plan: A document that forms part of the Local Plan and is specific to areas of significant change or conservation.

Article 4 Direction: A direction which withdraws automatic planning permission granted by the General Permitted Development Order.

Biodiversity: The variety of life on Earth. It is the variety within and between all species of plants, animals and micro-organisms and the ecosystems within which they live and interact.

Brownfield Land (also Previously Developed Land): Land which is or was occupied by a permanent structure, including the curtilage of the developed land (although it should not be assumed that the whole of the curtilage should be developed) and any associated fixed surface infrastructure. This excludes: land that is or was last occupied by agricultural or forestry buildings; land that has been developed for minerals extraction or waste disposal by landfill, where provision for restoration has been made through development management procedures; land in built up areas such as residential gardens, parks, recreation grounds and allotments; and land that was previously developed but where the remains of the permanent structure or fixed surface structure have blended into the landscape.

Community Infrastructure Levy: CIL is a charge placed on development. Its purpose is to help fund the infrastructure to support development proposed in the Local Plan.

Conservation (for heritage policy): The process of maintaining and managing change to a heritage asset in a way that sustains and, where appropriate, enhances its significance.

Conservation Area: Areas of special architectural or historic interest, designated under Section 69 of the Planning (Listed Buildings and Conservation Areas) Act 1990.

Contextual Indicators: Measures of change in the wider social, economic and environmental background against which policies operate. As such, they help to relate policy outputs to the local area.

Core Strategy: Part 1 of the Local Plan. A Development Plan Document that sets out the vision, strategy and core policies for the spatial development of the district.

Density (Housing): The definition and method for calculating the average number of houses built per hectare on a site-by-site basis.

Development: Construction, engineering and other operations associated with land and/or the change of use of buildings or land.

Development Management Policies DPD: Sets out policy criteria against which planning applications will be considered including design and environmental standards. When a planning application is submitted, the Council uses development management policies

(planning policies) alongside other policies in the Development Plan to help it to assess whether or not the application should be granted planning permission.

Development Plan: This includes adopted Development Plan Documents including adopted Local Plans and Neighbourhood Plans that have been made and published spatial development strategies. Neighbourhood plans that have been approved at referendum are also part of the development plan, unless the local planning authority decides that the neighbourhood plan should not be made. It forms the basis for development and land use decisions in the District and is defined in section 38 of the Planning and Compulsory Purchase Act 2004. The Current Development Plan for the South Lakeland area in addition to the adopted Local Plan, includes the adopted Cumbria Minerals and Waste Local Plan, and the adopted Heversham and Hincaster and the Grange over Sands Neighbourhood Development Plans.

Development Plan Documents (DPDs): Form part of a Local Plan. Planning documents that have 'development plan' status in the determination of planning applications and carry considerable weight within the 'plan-led' system. DPDs are subject to independent examination.

Dwelling: A self-contained unit of accommodation such as a house, flat, maisonette or bungalow.

Evidence Base: Information gathered by the local planning authority to support preparation of local plan development plan documents. Includes quantitative and qualitative data.

Geodiversity: The range of rocks, minerals, fossils, soils and landforms.

Greenfield: Land which has not previously been subject to development including land that is or was last occupied by agricultural or forestry buildings; land that has been developed for minerals extraction or waste disposal by landfill, where provision for restoration has been made through development management procedures; land in built up areas such as residential gardens, parks, recreation grounds and allotments; and land that was previously developed but where the remains of the permanent structure or fixed surface structure have blended into the landscape. Greenfield land includes undeveloped parks and open spaces within towns and settlements.

Green Infrastructure: A network of multi-functional green space, urban and rural, which is capable of delivering a wide range of environmental and quality of life benefits for local communities.

Historic Environment: All aspects of the environment resulting from the interaction between people and places through time, including all surviving physical remains of past human activity, whether visible, buried or submerged, and landscaped and planted or managed flora.

Housing Needs Survey / Assessment: A survey which estimates, using the results of detailed research, the number of households within an area that are in need of affordable housing and/or housing that meets their specific requirements.

Housing Trajectory: A means of showing past and future housing performance by identifying the predicted requirement and provision of housing over the lifespan of the Local Plan.

Indicators: Measure the direct effects of a policy. Used to assess whether policy targets are being achieved in reality using available information.

Infrastructure: The range of physical structures, facilities and services required to support communities, including roads, public transport water supply, sewage disposal, schools, health services and green infrastructure such as parks, sports facilities and open spaces.

International, national and locally designated sites of importance for biodiversity: All international sites (Special Areas of Conservation, Special Protection Areas, and Ramsar sites), national sites (Sites of Special Scientific Interest) and locally designated sites including Local Wildlife Sites.

Listed Buildings: Buildings and structures that have been identified as being of special architectural or historic interest and whose protection and maintenance, including that of their curtilage and setting, is the subject of special legislation. Listed Building Consent is required before any works can be carried out on a listed building.

Local Development Documents (LDDs): A generic term for Development Plan Documents, Supplementary Planning Documents and the Statement of Community Involvement. Where the more general phrase 'Local Plan Documents' is used, it means LDDs.

Local Development Scheme (LDS): The project plan setting out the programme and timetable for preparing the Local Plan and Local Development Plan Documents.

Local Enterprise Partnership: A body, designated by the Secretary of State for Communities and Local Government, established for the purpose of creating or improving the conditions for economic growth in an area. They are business led partnerships between local authorities and local private sector businesses. They play a central role in determining local economic priorities and undertaking activities to drive economic growth and job creation, improve infrastructure and raise workforce skills.

Local planning Authority (LPA): The public authority whose duty it is to carry out specific planning functions for a particular area.

Local Plan: The (February 2019) National Planning Policy Framework uses this term to refer to the plan for the future development of the local area, drawn up by the local planning authority in consultation with the community. In law this is described as the development plan documents adopted under the Planning and Compulsory Purchase Act 2004. A local plan can consist of either strategic or non-strategic policies or a combination of the two. In this document, the term 'Local Plan' consists of the following adopted Development Plan Documents (DPDs): Part 1 – South Lakeland Core Strategy, Part 2 - Land Allocations; Part 3 - Development Management Policies and Part 4 - Arnsdale & Silverdale Area of Outstanding Natural Beauty (AONB) DPD. The extension of the Lake District National Park

and the Yorkshire Dales National Parks planning authority areas (the Aug. 2016 boundary extension), also means that some 'saved' South Lakeland Local Plan Policies apply in parts of the National Parks, until superseded by new National Park planning policies.

Main Town Centre Uses: Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts; culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

Monitoring: The regular and systematic collection and analysis of information to measure policy implementation.

Neighbourhood Development Plan: A plan prepared by a Parish Council or Neighbourhood Forum for a particular designated neighbourhood area. In law this is described as a neighbourhood development plan in the Planning and Compulsory Purchase Act 2004.

Open space: All open space of public value, including not just land, but also areas of water (such as rivers, canals, lakes and reservoirs) which offer important opportunities for sport and recreation and can act as a visual amenity.

Policy Implementation: Assessment of the effectiveness of policies in terms of achieving their targets. Measured by use of output and contextual indicators.

Previously developed land: see 'Brownfield Land'

Primary shopping area: Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).

Primary and secondary frontages: Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.

Policies Map: The adopted policies map illustrates on a base map all the relevant policies set out in Development Plan Documents (DPDs). It must be revised as each new DPD is adopted.

Regulations: Secondary legislation passed by the UK Government setting out how Acts (primary legislation) should be implemented. Regulations relevant to plan making include: the Town and Country Planning (Local Development) (England) Regulations 2004, the Town and Country Planning (Transitional Arrangements) Regulations 2004, the Town and Country Planning (Local Development) (England) Amendments 2008, The Town and Country Planning (Local Planning) (England) Regulations 2012, the Neighbourhood Planning (General) Regulations 2012 and the 2015 amendment and the Neighbourhood

Planning (General) and Development Management Procedure (amendment) Regulations 2016.

Renewable and Low Carbon Energy: Includes energy for heating and cooling as well as for generating electricity. Renewable energy covers those energy flows that occur naturally and repeatedly in the environment – from the wind, the fall of water, the movement of the oceans, from the sun and also from biomass and deep geothermal heat. Low carbon technologies are those that can help reduce emissions (compared to conventional use of fossil fuels).

Scheduled Monument: A feature of national historical or archaeological importance, either above or below the ground, which is included in the schedule of monuments as identified by the Secretary of State.

Self-Build and Custom Build Housing: Housing built by an individual, a group of individuals, or persons working with or for them, to be occupied by that individual. Such housing can be either market or affordable housing. A legal definition, for the purpose of applying the Self-build and Custom Housebuilding Act 2015 (as amended), in section 1 (A1) and (A2) of that Act.

Site of Special Scientific Interest (SSSI): Nationally important areas of land designated under the Wildlife and Countryside Act 1981 as being of special interest for nature and/or geological conservation.

Starter Homes: Introduced through the Housing and Planning Act 2016. A starter home is a new dwelling that is available to qualifying first time buyers only (is at least 23 years old but has not yet reached the age of 40), is to be sold at least 20% discount of the market value, is to be sold for less than a price cap and is subject to any restrictions on sale or letting as specified in Regulations.

Statement of Community Involvement (SCI): Sets out how the Development Plans Team proposes to engage with stakeholders and the community in the plan-making process for Local Development Documents and in considering planning applications. It also sets out the protocol – what assistance a neighbourhood plan forum or parish council can expect from the Council when preparing a neighbourhood plan.

Supplementary Planning Documents: Documents which add further detail to the policies in the Local Plan (formerly known as the LDF). They can be used to provide further guidance for development on specific sites, or on particular issues, such as design. Supplementary planning documents are capable of being a material consideration in planning decisions but are not part of the development plan.

Sustainable Development: The purpose of the planning system is to contribute to the achievement of sustainable development. At a very high level, the objective of sustainable development can be summarised as meeting the needs of the present without compromising the ability of future generations to meet their own needs.

Targets: Thresholds that identify the scale of change to be derived from policies over a specific time period (e.g. number of affordable homes to be built by a set date).

Town Centre: Area defined on the local authority's policies map, including the primary shopping area and areas pre-dominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in the development plan, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.

Use Classes Order (UCO): The Town and Country Planning (Use Classes) Order 1987 (as amended) specifies sixteen classes of land use. These are:

- UCO A1 – Shops
- UCO A2 – Financial and Professional Services
- UCO A3 – Restaurants and Cafés
- UCO A4 – Drinking Establishments
- UCO A5 – Hot Food Takeaways
- UCO B1 – Business split into three sub-classes:
 - B1 (a) – as an **office** other than a use within class A2 (financial and professional services);
 - B1 (b) – **for research and development** of products or processes; and
 - B1 (c) – for any **industrial process**, being a use that can be carried out in any residential area without detriment to the amenity of that area by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust or grit.
- UCO B2 – General Industrial – use for the carrying out of an industrial process.
- UCO B8 – Storage or Distribution
- UCO C1 – Hotels
- UCO C2 – Residential Institutions
- UCO C2A – Secure residential institution
- UCO C3 – Dwelling Houses
- UCO C4 – Houses in multiple occupation
- UCO D1 – Non-residential Institutions
- UCO D2 – Assembly and Leisure
- Sui Generis – No class specified in the schedule. Certain uses do not fall within any use class and are considered 'sui generis'. Such uses include: betting offices/shops, pay day loan shops, theatres, larger houses in multiple occupation, hostels providing no significant element of care, scrap yards. Petrol filling stations and shops selling and/or displaying motor vehicles. Retail warehouse clubs, nightclubs, launderettes, taxi businesses and casinos

Changes to the Use Classes Order (UCO) proposed from 1st September 2020⁴⁸

Use	Use Class up to 31 Aug. 2020	Use Class from 1 September 2020
Shop not more than 280sq.m., mostly selling essential goods, including food and at least 1km from another similar shop.	A1	F.2
Shop	A1	E(a)
Financial and professional services (not medical)	A2	E(c) (i) E(c) (ii)
Café or restaurant	A3	E(b)
Pub or drinking establishment	A4	Sui generis
Take away	A5	Sui generis
Office other than a use within Class A2	B1 a	E(g)(i)
Research and development of products or processes	B1 b	E(g)(ii)
For any industrial process (which can be carried out in any residential area without causing detriment to the amenity of the area)	B1 c	E(g)(iii)
Industrial	B2	B2
Storage and Distribution. Includes open air storage	B8	B8
Hotels, boarding and guest houses	C1	C1
Residential institutions	C2	C2
Secure residential institutions	C2a	C2a
Dwelling houses	C3	C3
Use of a dwelling house by 3 – 6 residents as a house in multiple occupation	C4	C4
Clinics, health centres, creches, day nurseries, day centre	D1	E(e-f)
Schools, non- residential education and training centres, museums, public libraries, public halls, exhibition halls, places of worship, law courts.	D1	F.1
Cinemas, concert halls, bingo halls and dance halls	D2	Sui generis
Gymnasiums, indoor recreations not involving motorised vehicles or firearms	D2	E(d)
Hall or meeting place for the	D2	F.2(c-d)

⁴⁸ https://www.planningportal.co.uk/info/200130/common_projects/9/change_of_use

Use	Use Class up to 31 Aug. 2020	Use Class from 1 September 2020
principal use of the local community		
Indoor or outdoor swimming baths, skating rinks and indoor sports or recreations not involving motorised vehicles or firearms	D2	F.2(c-d)
New Use Classes from 1st September 2020 are:		
Class E (Commercial, business and service uses)		
Class F.1 (Learning and non-residential institutions)		
Class F.2 (Local Community Uses)		

Changes of use within the same use class are not development. Use classes prior to 1 September 2020 will remain relevant for certain change of use permitted development rights, until 31 July 2021.