

# ST MAWGAN IN PYDAR NDP EVIDENCE BASE

## Economy and Employment

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# 1. Planning Policy Background

## Industrial Strategy: Building a Britain fit for the future.

1.1 The Government's Industrial Strategy [2017] sets out a vision to drive productivity improvements across the UK, identifies a number of Grand Challenges facing all nations, and sets out a delivery programme to make the UK a leader in four of these: artificial intelligence and big data; clean growth; future mobility; and catering for an ageing society.

## National Planning Policy Framework 2023.

1.2 Key messages from the NPPF include-

- Planning should ensure 'that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure (Para 8).
- Planning policies should help create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development. The approach taken should allow each area to build on its strengths, counter any weaknesses and address the challenges of the future... (Para 85).
- Planning policy should include a vision and strategy which 'positively and proactively encourages sustainable economic growth' and be flexible enough to accommodate needs not anticipated in the plan, and allow for new and flexible working practices (such as live-work accommodation) (Para 86);
- Planning policies should support economic growth in rural areas by:
  - the sustainable growth and expansion of all types of business and enterprise, both through conversion of existing buildings and well-designed new buildings
  - the development and diversification of agricultural and other land-based rural businesses
  - sustainable rural tourism and leisure developments that respect the character of the countryside
  - promote the retention and development of local services and community facilities in villages, such as local shops, meeting places, sports venues, cultural buildings, public houses and places of worship (Para 88)
- Planning policies should recognise that sites to meet local business and community needs in rural areas may have to be found adjacent to or beyond existing settlements, and in locations that are not well served by public transport. They should be sensitive to surroundings, not have an unacceptable impact on local roads and exploit opportunities to make a location more sustainable. The use of previously developed land, and sites that are physically well-related to existing settlements, should be encouraged where suitable opportunities exist. (para 89)

## Cornwall Local Plan.

1.3 Key messages from the Cornwall Local Plan include:

- Maintaining a positive policy framework with a focus on sustaining a range of local businesses including both new business and the traditional industries of fishing, farming and minerals (Objective 1 and Policy 2 (3c)).
- Enhancing the cultural and tourist offer in Cornwall and promoting Cornwall as a year-round destination for tourism and recreation (Objective 2).

- Supporting employment schemes in ...rural areas, giving particular emphasis to quality and permanent work opportunities that break seasonal labour cycles; ‘smart specialisation’ sectors including food, renewable energies (including geothermal), and cultural industries; and supporting the provision of work hubs and the ability to work from home through live/work units (Policy 2 (3 f, g and h))
- Employment development planning should emphasise (Policy 5):
  - The development of tourism facilities through the enhancement of existing, and the provision of new, high quality sustainable tourism facilities, attractions and accommodation, that is of an appropriate scale to their location.
  - Provision of education facilities that improve the training and skills base.
  - Safeguarding existing strategic employment land and buildings
  - Safeguarding other existing employment land and buildings where they remain viable for an employment use.
  - Considering alternative uses for other existing employment where this does not result in the loss of economic performance of the site or location, i.e. through the redevelopment for a mix of uses.
  - Employment proposals should be located either:
    - within or well-integrated to our city, towns and villages; or
    - as extensions to on existing employment (uses B1, B2 and B8) locations sites where re-location would be impractical or not viable; or
    - within areas that are well served by public transport and communications infrastructure.

#### Cornwall Climate Emergency Development Plan Document (CEDPD)

1.4 The Cornwall Climate Emergency Development Plan Document supports the further sustainability of rural areas and seeks to provide opportunities for development, agricultural diversification and regenerative land management and ecosystem service provision. It seeks to identify ways that planning can help influence land management to reduce greenhouse gas emissions and increase carbon absorption. Rural communities also need to be provided with opportunities to help support their sustainability. Whilst there remain clear relationships between rural communities and towns for services and employment, the DPD says it makes sense that day to day needs can also be met locally to reduce the need to travel. It recognises the particular demand for opportunities for small groups of dwellings to be established in more rural locations, offering an opportunity for off grid living, similar to existing policies in Wales (known as ‘one planet development’) and Dartmoor National Park.

#### Other plans and studies

- 1.5 **‘Vision 2030: The Cornwall and Isles of Scilly Strategic Economic Plan 2017 – 2030’** prepared by The Cornwall and Isles of Scilly Local Enterprise Partnership (LEP aims to achieve a situation by 2030 in which ‘Cornwall and Isles of Scilly will be the place where business thrives and people enjoy an outstanding quality of life’.
- 1.6 Three strategic themes of Business, People and Place inform the interventions to be made through investment and policy. The ‘strategic drivers’ flowing from these are to support innovation and creativity, seek productivity led and inclusive growth, help people build great careers, support vibrant communities and ensure that Cornwall has global recognition.

- 1.7 As a result, the strategy calls for actions which build cultural identity and excellence, support environment-based growth, promote healthy and diverse communities, and encourage innovation in industry, including agri-tech and digital connectivity. The need to support rural areas, which are often remote from job markets and have declining local opportunities, are specifically recognised as needing attention.
- 1.8 St Mawgan in Pydar Parish falls into the ‘Mid Cornwall Growth Corridor’ zone straddling the County from coast to coast, including Newquay, Turo and St Austell. It is also in the ‘Engineering and Digital Collaboration’ zone running diagonally south west, including Truro, Redruth, Camborne and Falmouth.
- 1.9 **‘10 Opportunities’**. The Cornwall and Isles of Scilly Local Enterprise Partnership (LEP) has also set out a ‘21st Century’ pitch to Government and business for future investment in Cornwall in the form of a prospectus focusing on 10 key sectors that can play a critical role in growing the economy of Cornwall and the Isles of Scilly now and in the future. This is known as ‘10 Opportunities’. It features elements that might well be applicable to St Mawgan in Pydar. These include growth opportunities in energy innovation, agri-food, tourism, and location. More details available at <https://cioslep.com/wp-content/uploads/2021/05/Vision-30.pdf>
- 1.10 In 2018 all LEP areas in England were invited to work in partnership with government to develop Local Industrial Strategies, which would be developed locally and agreed with government. **The Cornwall and Isles of Scilly (CloS) Industrial Strategy** is built upon the ambitions and priorities identified in the current Strategic Economic Plan for CloS (Vision 2030) and the more recent 10 Opportunities document [see above] but is more focused on achieving a decarbonised and sustainable future for business. The Strategy vision is that:

*‘In 2030 the Cornwall and Isles of Scilly creative and carbon-neutral economy will be realising opportunities for its people, communities and businesses to thrive, benefiting the environment and providing an outstanding quality of life for all’.*

- 1.11 The Strategy says that performance across the economy will be lifted through an integrated approach:

<b>Lifting productivity:</b> Expanding breadth and depth of niche, high-performing sectors. Improving the quality of jobs and business performance in the highly specialised, but low-productivity sectors. Building capability and capacity in emerging strengths and growth sectors with above average productivity. Promoting quality of opportunity and efficiency across the wider economy in the ‘foundational’ sectors.				
<b>Place:</b> A thriving network of connected and innovative businesses, equitable communities and productive systems, all capitalising on the strengths and opportunities of our cultural assets and natural capital.				
<b>People:</b> A skilled, healthy and inclusive workforce that feels inspired and valued, enjoying quality of life, a living wage and pride of place.	<b>Infrastructure:</b> A fully connected economy, built environment, and transport system powered by a zero-carbon smart grid and accessible green infrastructure.	<b>Business environment:</b> Productive, innovative businesses, scaling up and working together to broaden CloS capabilities and retain value from a circular economy.	<b>Ideas:</b> A growing entrepreneurial ecosystem nurtured by our anchor institutions, embedding R&D, creativity and innovation in business to improve productivity.	
<b>Clean Energy</b> Capitalising on natural resources; leading innovation in	<b>Geo Resources</b> Harnessing expertise and the critical minerals necessary for low-carbon transition,	<b>Data &amp; Space</b> Exploiting the unique physical, digital and intellectual assets in the region. Using	<b>Visitor Economy</b> Making CloS the global leader for low-carbon experiences for visitors and	<b>Agri-food</b> Creating a productive and sustainable sector maximising market opportunities for land and marine

floating offshore wind (FLOW) and deep geothermal.	in a sustainable way.	data to overcome local and global challenges.	residents, maximising links to the environment, heritage and culture.	management, and food processing/ production
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1.12 The St Mawgan in Pydar Parish NDP can support the delivery of the Industrial Strategy by ensuring that its policies help to create the conditions in which it can be delivered, for example through engendering a pride of place, supporting green infrastructure, enabling business growth, and in particular, helping the visitor economy to better link environment, heritage and culture.

1.13 **‘The Cornwall Environmental Growth Strategy’** has a long-term vision that by 2065, ‘Cornwall’s environment will be naturally diverse, beautiful and healthy, supporting a thriving society, prosperous economy and abundance of wildlife’.

1.14 **The Cornwall Council Creative Manifesto for 2021–2025** has the ambition of making Cornwall the leading rural creative economy in the country. It includes many proposals, the most relevant to Neighbourhood Planning being its ‘place shaping’ initiatives which aim to enhance, amongst other things, the tangible cultural assets that contribute to cultural distinctiveness.

1.15 **The UK Government’s 2022 Levelling Up White Paper** seeks to:

- Boost productivity, pay, jobs and living standards by growing the private sector, especially in those places where they are lagging
- Spread opportunities and improve public services, especially in those places where they are weakest
- Restore a sense of community, local pride and belonging, especially in those places where they have been lost
- Empower local leaders and communities, especially in those places lacking local agency.

1.16 In June 2021, the UK government published the **Tourism Recovery Plan** in response to the significant impact that the COVID-19 pandemic had wrought on the sector. The Plan outlined the following six objectives:

1.17 For the short to medium term, to:

- recover domestic overnight trip volume and spend to 2019 levels by the end of 2022, and inbound visitor numbers and spend by the end of 2023 – both at least a year faster than independent forecasts.

1.18 And for the medium to long term, to:

- ensure that the sector’s recovery benefits every nation and region, with visitors staying longer, growing accommodation occupancy rates in the off-season and high levels of investment in tourism products and transport infrastructure;
- build back better with a more productive, innovative and resilient industry, maximising the potential for technology and data to enhance the visitor experience and employing more UK nationals in year-round quality jobs;
- ensure the tourism industry contributes to the enhancement and conservation of the country’s cultural, natural and historic heritage and minimises damage to the environment;

- ensure the tourism industry provides an inclusive offer that is open to all, aiming for the UK to become the most accessible tourism destination in Europe by 2025; and
- make the UK a leading European nation for hosting business events.

## 2. Baseline

### Economic Activity

2.1 Figure 28 below shows that in 2021 St Mawgan in Pydar parish had a high proportion of retired economically inactive people [31.1%]. Many of these will be people enjoying a larger than typical retirement income. Overall, 42.9% of the population was economically inactive, compared to Cornwall [44.2%] and England [39.1%] [See Figure 1].

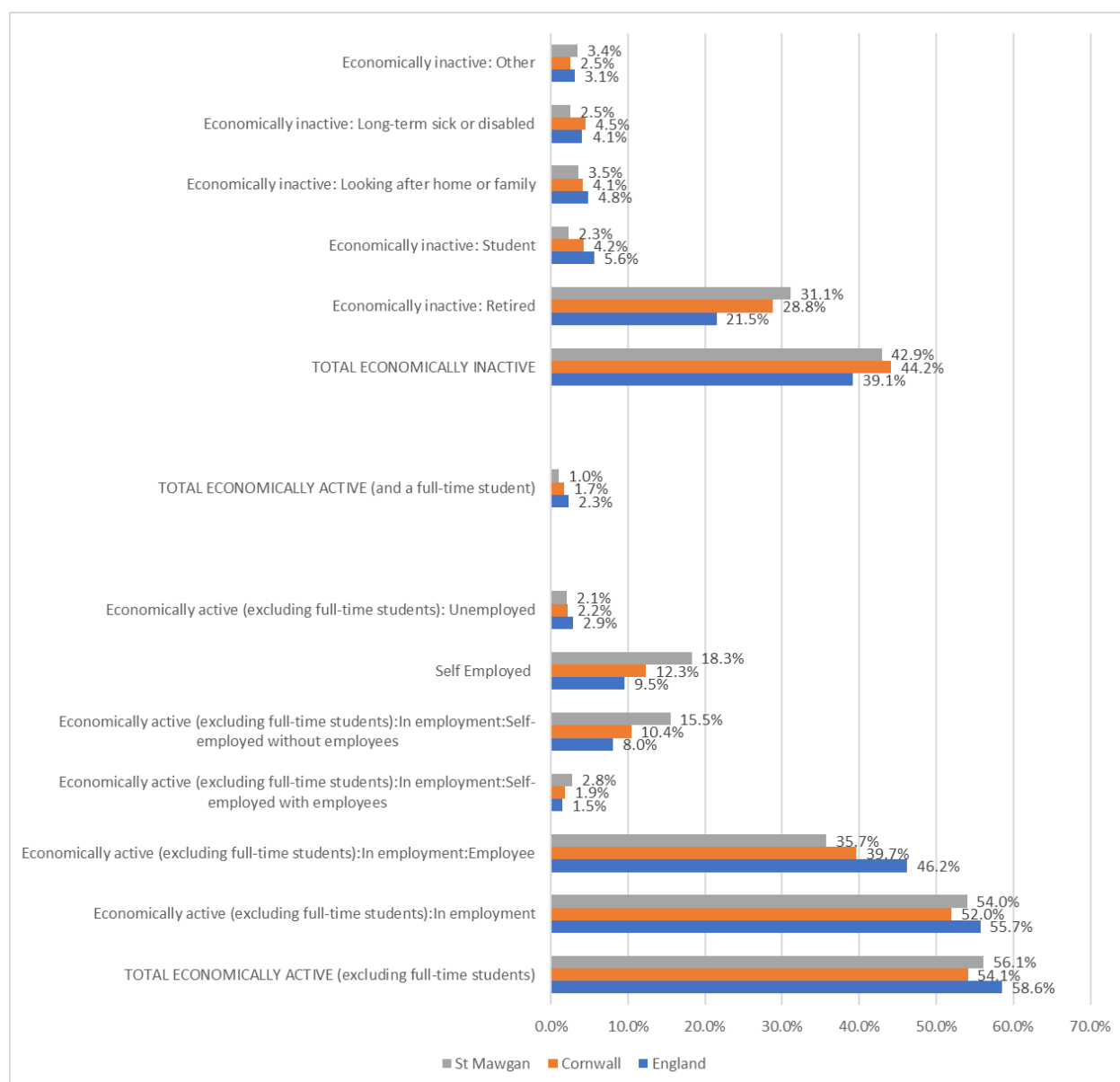


Figure 1: Economic Activity [Source: Census 2021 Table TS 066].

### Employment Categories

2.2 In 2021, approximately some 54.6% [494] residents aged 16 or over were in employment. Of these Some 36% worked part-time and 64% full-time. In comparison, the figure for England was 57.4% in employment, of which 30.7% worked part-time, and 70.2% full-time. For Cornwall 53.3% were in employment, of which 35.7% worked part-time, and 64.3% full-time.

## Unemployment and Benefits

2.3 There is no data available for the Parish, but for the 019A LSOA which includes St Mawgan in Pydar the Jobseekers/UC 'claimant count' in March 2023 was 15. The Census 2021 recorded that 19 people, or 2.1% of the usually resident population of age 16 or over were unemployed [Source: NOMIS Claimant Count March 2023, Census 2021 Table TS066]

## Occupation of Residents

2.4 From Figure 2 it can be seen that residents' jobs were mainly in public administration, education and health and distribution, hotels and restaurants.

<b>FIGURE 2: INDUSTRY OF JOBS HELD BY EMPLOYED ADULT RESIDENTS OF ST MAWGAN PARISH</b>				
<b>Industry</b>	<b>St Mawgan</b>		<b>Cornwall</b>	<b>England</b>
<b>O, P, Q Public administration, education and health</b>	170	32.5%	30.3%	30.3%
<b>G, I Distribution, hotels and restaurants</b>	127	24.3%	24.5%	19.9%
<b>K, L, M, N Financial, real estate, professional, administrative activities</b>	76	14.5%	12.9%	17.4%
<b>F Construction</b>	48	9.2%	10.7%	8.7%
<b>C Manufacturing</b>	32	6.1%	6.4%	7.3%
<b>R, S, T, U Other</b>	31	5.9%	4.9%	4.6%
<b>A, B, D, E Agriculture, energy and water</b>	21	4.0%	4.5%	2.3%
<b>H, J Transport and communication</b>	18	3.4%	5.8%	9.7%
<b>Source: Census 2021 Tables TS060 and PP009</b>				

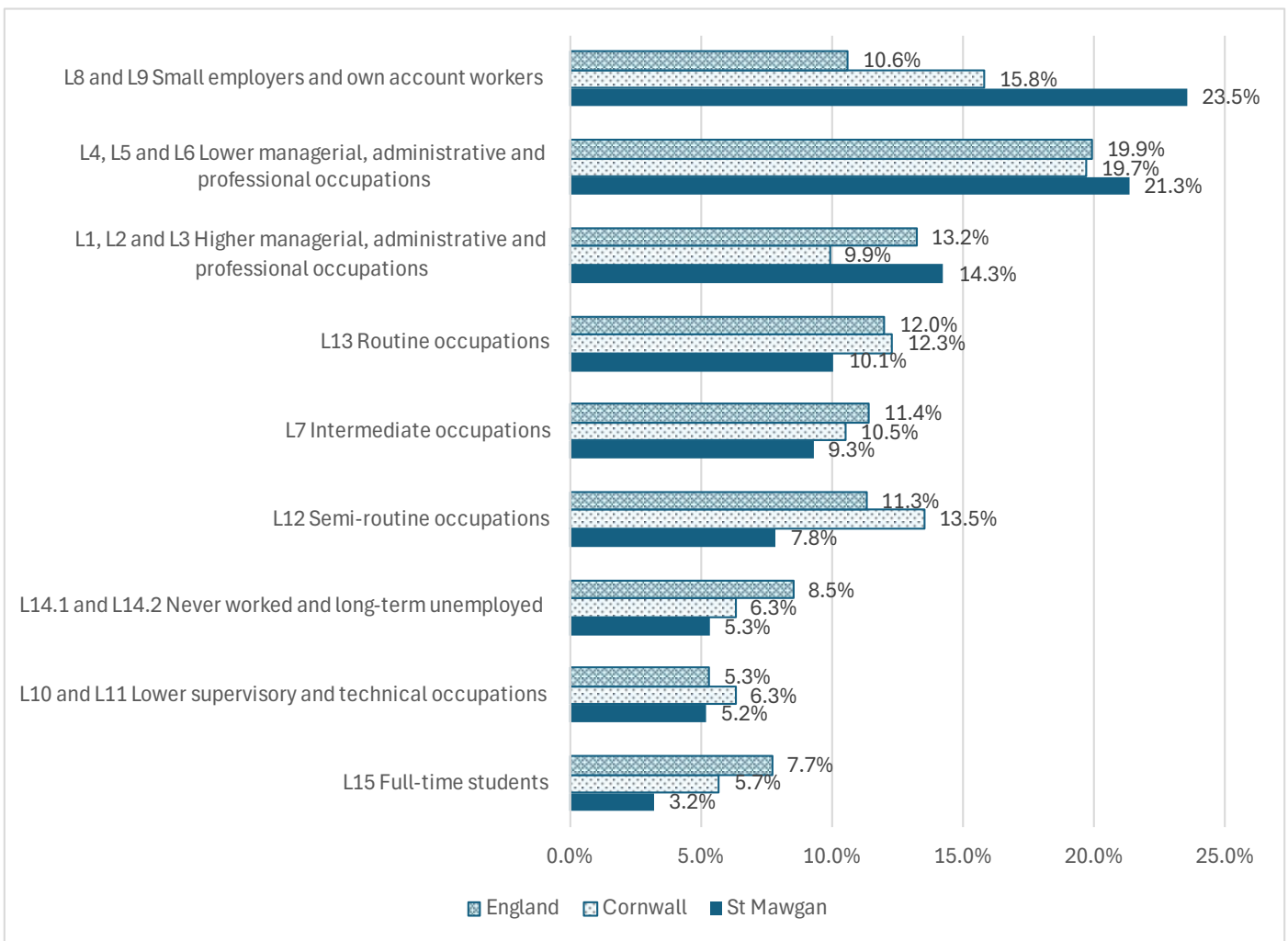


Figure 3: National Statistics Socio-economic Classification. [Source : Census 2021 Table TS062].

2.5 It can be seen from Figure 3 that St Mawgan in Pydar had a higher than usual representation of those who were small employers and own account workers, and people in higher and lower managerial, administrative and professional occupations. On the other hand there were fewer in lower supervisory and routine roles, and fewer never worked/long term unemployed. Overall, this data reflects a very high level, proportionally, of people running their own businesses, typical of a rural area, and also the location close to St Mawgan Airport with its employment sources and relatively rapid links with major cities, on an attractive coast. The high level of people in the small employers, own account and managerial etc roles is often seen as an indicator of greater wealth and better ‘life chances’ amongst the community. This may be added to by the presence of more retired people with higher levels of ‘unearned’ income (ie private pensions etc) and the greater proportion of self-employed people. It is important note that there may be, however, a core of younger adults on lower incomes whose needs must be considered.

### Jobs in the Parish

2.6 There are no major employers within the parish. Accurate workplace data is not yet available at very local geographies in the 2021 Census, but we can infer some conclusions from the travel to work data [See Figure 38]. Some 34.9% of adults 16 to 74 yrs old in employment worked from home, which is higher than for England (31.5%) and much higher than Cornwall (24.7%). Another 11.8% worked less than 5km from home, from which we can surmise local jobs or in surrounding Parishes. It can be inferred therefore that about 46.7% of residents’ jobs are within the Parish or very near to it. [See Figure 4] Source: Census 2021 Table TS 058]



FIGURE 4: DISTANCE TRAVELLED TO WORK	St Mawgan in Pydar %	Cornwall %	England %
Less than 2km	4.9%	13.2%	11.0%
2km to less than 5km	6.9%	8.9%	12.6%
5km to less than 10km	11.0%	9.2%	11.7%
10km to less than 20km	8.7%	12.7%	10.4%
20km to less than 30km	8.5%	5.2%	4.0%
30km to less than 40km	1.8%	2.4%	1.7%
40km to less than 60km	2.6%	2.4%	1.3%
60km and over	3.7%	3.3%	1.3%
Works mainly from home	34.9%	24.7%	31.5%
Works mainly at an offshore installation, in no fixed place, or outside the UK	17.0%	17.9%	14.5%

Source: Census 2021 Table TS 058]

### Jobs outside the Parish

2.7 Thus about 53.3% of residents' jobs were further afield. About 11% of residents in employment worked between 5km and 10km away, which would bring in Newquay and Newquay Airport, with its growing high-tech sectors related to aviation and space. Some 17.2% work 10km to 30km away, reaching Truro, Redruth/Camborne and Falmouth. Thus about 40% of journey to work trips are within 30km, and 8.1% are from 30km and above, a looser profile to that of Cornwall where 49.2% of work journeys are within 30km and 8.1% further, and also than England where the comparative figures are 49.7% and 4.3%, reflecting both a lack of suitable job opportunities in the immediate area and its attractiveness to commuters with jobs farther afield.

### Workspaces

2.8 The Neighbourhood Plan community survey identified around 46 businesses and home workers across the parish ranging from tourism accommodation and services providers, building trades [electricians, carpenters, builders and plumbers], manufacturing [fabrication and welding, play equipment construction], education [school and also the Preschool], crafts, lifestyle advisers, agriculture, professional services, and self-employed dog walkers, dog groomers, garden maintenance etc. Most were small employing between 1 to 5 people [75%]. [See Figures 5 and 6 below for more information].

Figure 5: Business types in St Mawgan in Pydar Parish		Figure 6: Size of Employers, St Mawgan In Pydar Parish	
Types	%age	Sizes	%age
Hospitality	41.3%	1 to 5	75.0%
Building trades	13.0%	6 to 10	6.3%
Professional	13.0%	11 to 15	10.4%
Food and drink	8.7%	over 15	8.3%

<b>Agriculture</b>	6.5%		
<b>Health and wellbeing</b>	6.5%		
<b>Craft</b>	6.5%		
<b>Manufacturing</b>	2.2%		
<b>Activity</b>	2.2%		

2.9 Greater diversity of workplaces and jobs within the Parish may help reduce reliance on tourism, which tends to be seasonal and subject to mid-term fluctuations caused by changes in wider economic forces.

### Agriculture

2.10 Outside of the airport, the Parish remains predominantly agricultural land use [Grade 3 and 4], mostly in pasture, but some arable, particularly on south west facing slopes. About 6.5% of local businesses are related to agriculture, and 4% of local jobs according to the 2021 census [see Figs 5 and 6].

2.11 Agricultural business is important for both the employment potential and its stewardship of the local landscape, biodiversity, heritage and recreational resources that benefit the Parish residents and visitors. The average income from farming enterprises is low in comparison to other industries and also unpredictable, being easily affected by currency exchange rates, supply and demand factors, and climate change impacts. The uncertainty over the future of farming associated with Brexit impacts and proposed taxation changes means there is a need to sustain existing businesses by providing more predictable revenue streams. Diversification of agricultural product and extended processing or into other land-based activity such as tourism and local retailing can be of great assistance. However, diversification can often require significant investment and commitment to a long payback period. It can also have negative environmental and amenity impacts which could have the potential to harm the landscape and the tourism economy. Farm specialisation is another means of raising the viability of farms. Unfortunately, some forms of specialisation can be problematic in environmental terms, such as calf-rearing, intensive dairying, and poultry rearing. Therefore, it makes sense to support less harmful farm diversification that protect and enhance the special qualities of the area, recognising that farmers are custodians of the landscape and biodiversity.

2.12 The continuing urban expansion of nearby Newquay, and the housing pressure likely to be brought by the continuing development of the airport and the promised improved rail links, may bring more pressure on agricultural land from new residents in the form of equine plotland. This may impinge on agricultural operations or be an opportunity for farm diversification.

### Tourism

2.13 St Mawgan in Pydar Parish is in a prime location on the North Cornwall coast between Padstow and Newquay both being approximately 7 miles away. Cornwall's airport is in the parish and is said to be the fastest growing regional airport in the UK. The airport potentially has the capacity to attract significant amounts of tourists to Cornwall. There are a number of domestic destinations, such as Edinburgh, Manchester, London, Dublin, Newcastle, and increasingly from abroad.

2.14 The area includes walking routes which attract and serve tourists, for example part of the South west Coast Path is in the parish, and the Cornish Celtic Way, a recognised 'Pilgrimage Route' supported by the British Pilgrimage Trust, passes through its heart. These both contribute to the local economy.

- 2.15 Mawgan Porth is a very popular holiday destination, with a strong and widely-held reputation as an excellent place for holiday making particularly amongst the middle-classes, receiving 7 mentions on the travel pages of The Times in 2024 so far, including the advice that *‘Mawgan Porth is a picture book seaside village five miles north of Newquay. Home to an award-winning cove replete with magical caves and moss-covered boulders, it’s enveloped in beauty from every angle, from its highest clifftop down to the arcing Atlantic waves which meet the golden (dog-friendly) beach’*.
- 2.16 The large sandy beach attracts families and surfers – and is popular with the local residents. The Neighbourhood Plan questionnaire respondents were very regular users of the beach.
- 2.17 There is a great array of holiday accommodation including two hotels, The Bedruthan Steps and The Scarlet. The Park holiday site provides chalets and caravans, with a swimming pool and restaurant open to non-residents. There is a large campsite at Trevarrian for caravans and tents, with swimming pool, bowling and bar open to non-residents and another at Tregurrian. There are two small campsites in Mawgan Porth, which provide easy access to the beach. There are several small sites which offer ‘glamping’.
- 2.18 Whilst all this reflects an industry that brings a significant contribution to the local economy, there is a down-side. Excessive levels of tourism can damage the special local heritage, biodiversity and landscape qualities which are the reason that visitors and tourists come to the area, add to traffic congestion and pollution, create competition for resources and cause harm to the amenity of nearby residential properties.
- 2.19 ‘Pop-up’ food outlets and retailers take advantage of the peak season, potentially cutting into the best earning opportunities for local enterprises. Many of these are thought to be from outside the area, so the income generated makes minimal contribution to local businesses. They are not part of the local circular economy that would support sustainability.
- 2.20 Furthermore, tourism popularity leads to pressure for second homes and holiday letting, which can cause problems for the supply of accommodation to meet local housing needs and aspirations, which is a concern for local residents [see Housing section of the evidence base].
- 2.21 CLP Policy 5 (Business and Tourism) encourages the development of new or enhancement of existing high-quality sustainable tourism facilities, attractions, and accommodation. However, the policy does state that this needs to be appropriate in scale to their location and accessibility, to provide a balanced mix of economic, social and environmental benefits. The size of the parish is a factor which needs consideration to ensure tourism does not have a detrimental effect on its character. People come to Mawgan Porth because of its relatively undeveloped nature.
- 2.22 Therefore, it is appropriate to support tourism development that makes best use of the area’s assets whilst providing care for them; maximises accessibility for residents to those facilities and features in the Parish that attract visitors, whilst offering protection to the special landscape and heritage character of the area.

### Superfast Broadband

- 2.23 Superfast broadband is available, but with speeds averaging around 30 to 40 mbs, apart from the Carloggas area, close to the airport, where 125-150 mbs is possible [See Figure 7]. However, the Parish is in the area of the Wildanet Project Gigabit. In January 2023, the UK Government awarded Wildanet with 2 contracts (worth £36 million) to provide gigabit capable broadband to over 19,000 premises in Southwest Cornwall and Mid Cornwall, which will eventually see the area able to access ultra-high speed internet [1000mbs].

2.24 The signal for mobile phones (voice and data) is limited, with generally no 5G signal, although 4G is generally available, apart from in the deepest valley areas [for example at St Mawgan, and Nawgan Porth]. The signal improved significantly just before the G7 summit in 2021.

2.25 It is important that current and future members of the community are not digitally disadvantaged, and that inward investment is not restricted by any local inadequacy in digital communications.

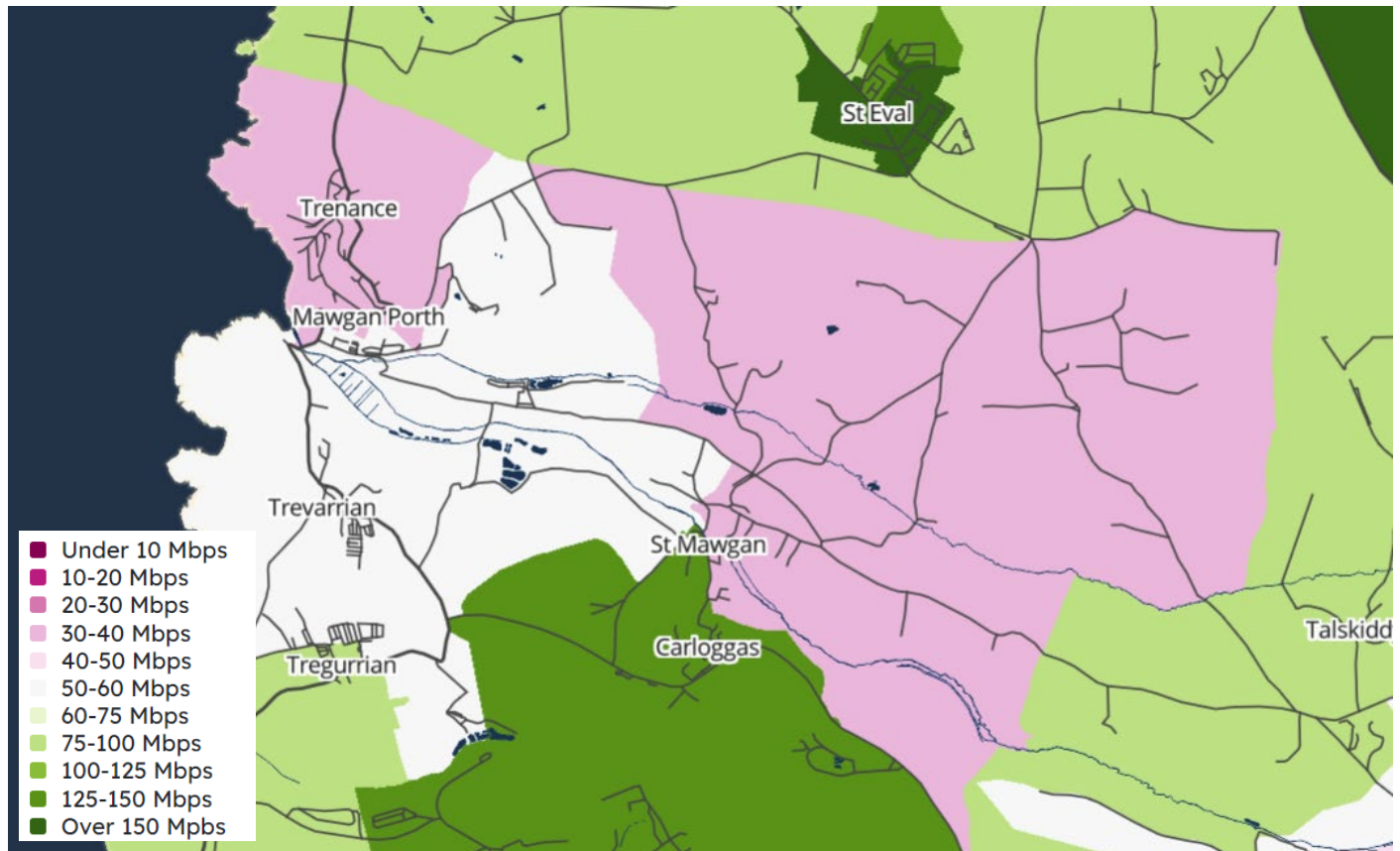


Figure 7: Broadband availability and average speeds [Source: Consumer Data Research Centre Datamapper].

### Agricultural and Land Based Rural Business Diversification

2.26 St Mawgan in Pydar is a rural Parish and includes a network of farms which are an integral part of the fabric of the local area. There is one large landowner with tenant farmers and cottages.

2.27 Agricultural business is important for both the employment potential and its stewardship of the local landscape, biodiversity, heritage and recreational resources that benefit the Parish residents and visitors. Even though the average income from farming enterprises is low in comparison to other industries the rural nature of the parish needs to be retained for its landscape value, to attract tourists and protect biodiversity.

2.28 Diversification of agricultural product and extended processing or into other land-based activity and local retailing can be of great assistance. However, diversification generally requires significant investment and commitment to a long payback period. It can also have negative environmental and amenity impacts which could have the potential to harm St Mawgan in Pydar's rural character. It is therefore necessary to support the diversification of agricultural and land based rural businesses in ways that protect and enhance the special qualities of the area.

### Working from Home and Home Based Businesses

2.29 Census 2021 indicates that up to 34.9 % of the economically active in the Parish worked at or mainly from home. Other data sources suggest that nationally the proportion of working adults who did any

work from home in 2020 increased to 37% on average from 27% in 2019. Some 24% of businesses stated that they intended to use increased homeworking going forward, with the Information and Communication industry recording the highest proportion (49%). Of working adults currently homeworking, 85% wanted to use a "hybrid" approach of both home and office working in future. However, there was some uncertainty among businesses, with 32% stating they were not sure what proportion of the workforce will be working from their usual place of work.

- 2.30 According to DBIS figures (2014) 1 in 10 domestic properties are home to at least 1 business and 59% of businesses are home based, comprising (i) those that undertake most or all of their activity in the residential home and (ii) those that operate from the home but a large proportion of their activity is conducted either at the client's premises or at outdoor sites. Although the number of small business and sole proprietorships has temporarily reduced as a result of COVID, it is expected they will continue to grow, and many of these will be home based, facilitated by the ability to use high speed broadband to access customers. According to Experian, 76% of retail businesses formed between April 2020 and February 2021 were registered at a residential address. Govt, data suggest that 60% of businesses start from home, and Centre for Economics and Business Research data suggests that 52% [2.75M] of businesses are home based. [ Source: DBIS figures; 'Business and individual attitudes towards the future of homeworking, UK: April to May 2021 Report' ONS; Census 2021 Table TS 058; Experian; CEBR].
- 2.31 Although recent press reports [["Never again": is Britain finally ready to return to the office?](https://www.theguardian.com/business/2023/aug/12/never-again-is-britain-finally-ready-to-return-to-the-office) <https://www.theguardian.com/business/2023/aug/12/never-again-is-britain-finally-ready-to-return-to-the-office> ] say that some major employers are now enforcing a return to the office, employees have enjoyed the experience and companies are beginning to struggle to 'attract and keep talent if they want people in the office full time five days a week'. It is reported that full-time employees in the UK, Australia, Canada and other English-speaking countries work about 1.4 days a week at home on average, and the proportion of vacancies in the UK advertised as hybrid has gone above 11% in June 2023, with and the number of jobs listed as fully remote at 15.1%.
- 2.32 These trends have the potential to make local shops and other services more viable and by reducing travel to work have a positive impact on climate change, although the impact on supporting services in business districts may be harmful.
- 2.33 They also place a greater focus on the ability of people to work from home and highlight the requirement for appropriate home office or work process space and sufficient broadband speeds. People may not have a suitable space within their home from which to run a business or 'WFH', or they may wish to distinctly and deliberately separate their work and living space. There could also be the need, on occasion, for ancillary workers such as managers, book keepers or accountants to visit home workers. Thus to maximise the opportunity for home run enterprises to be created and supported in the long term there is a need to support the construction of extensions, the conversion of outbuildings, and the development of new free standing buildings in gardens from which businesses and home workers can operate.
- 2.34 In most cases planning permission is not required. However, where building alterations beyond Permitted Development limits are involved, or the scale of business materially changes the use of the premises, including impacts on the amenity of adjoining residents through activity outside of reasonable work hours, or other environmental harm such as increased traffic, noise and smells, then planning permission may be required. Therefore a criteria based approach to impact assessment of planning applications for such development allows balanced consideration of the impacts that might occur in different situations.

### 3. Related Community Engagement Feedback

- 3.1 The parish Neighbourhood Plan questionnaire asked about local businesses. Twenty three percent of respondents owned a small business in the local area, 41% of those being in hospitality.
- 3.2 The questionnaire also asked, 'If you are employed, where do you work?' About 31% of employed residents worked within the parish, and a further 35% within 15 miles, with 34,2% further afield.
- 3.3 With respect to employment within the parish, 74% felt that places which currently provide employment within our parish area should be protected to keep jobs within the local area.

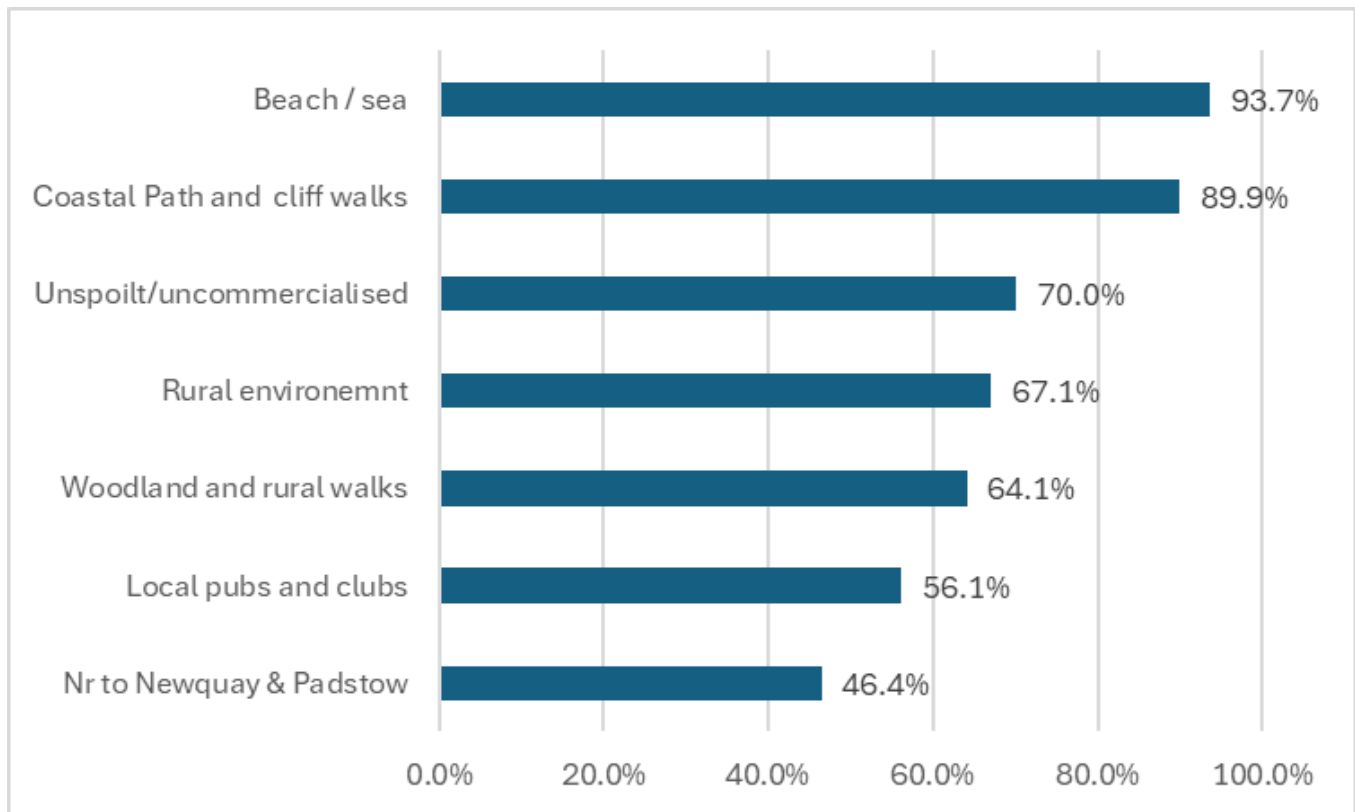


Figure 8: What attracts Tourists to St Mawgan in Pydar area.

- 3.4 The questionnaire asked if they thought tourism plays an important role in the parish council area, to which 95% of the NP questionnaire respondents replied that it did. When asked what aspects of the area attracted tourists, its unspoilt coastal features and character came top.
- 3.5 Additional attractions that were mentioned in comments included:
- sea-based activities
  - family friendly
  - Boardmasters Festival
  - community events
  - historical unspoilt charm
- 3.6 Traditional family beach holidays were cited as the type of tourism that suits the nature of the local area, along with walking and surfing holidays. Day trips and coach tours were deemed the least appropriate form of tourism.

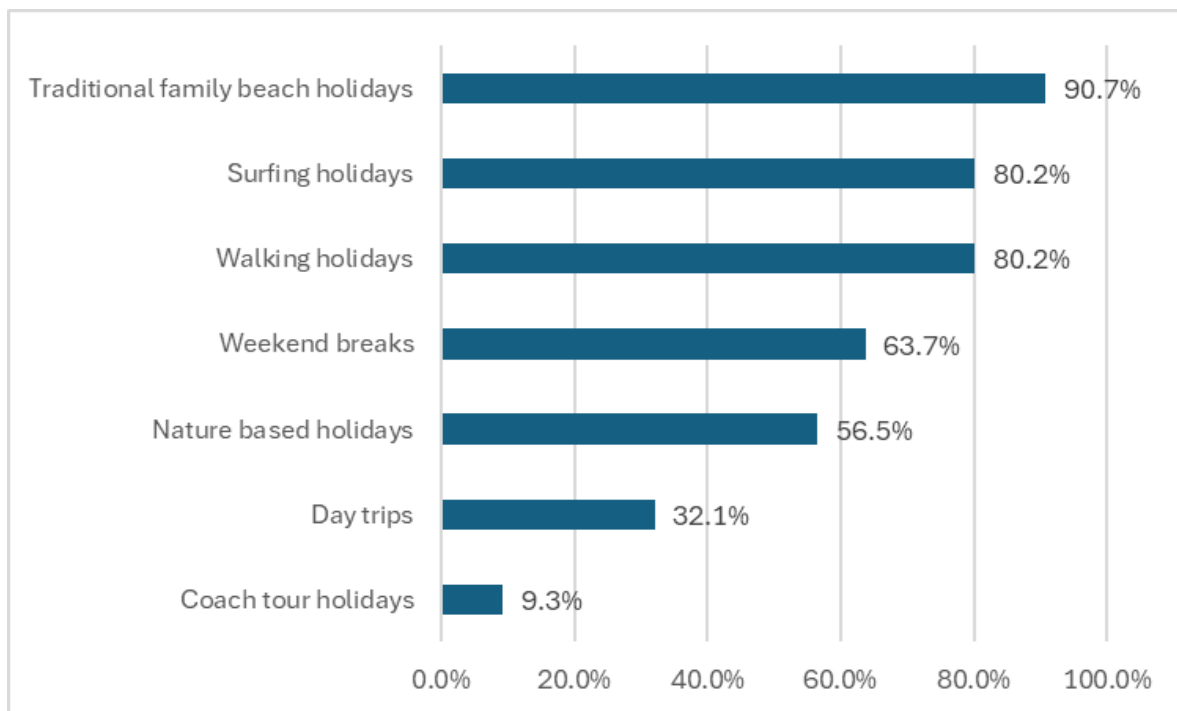


Figure 9: What type of tourism best suits the nature of St Mawgan in Pydar area.

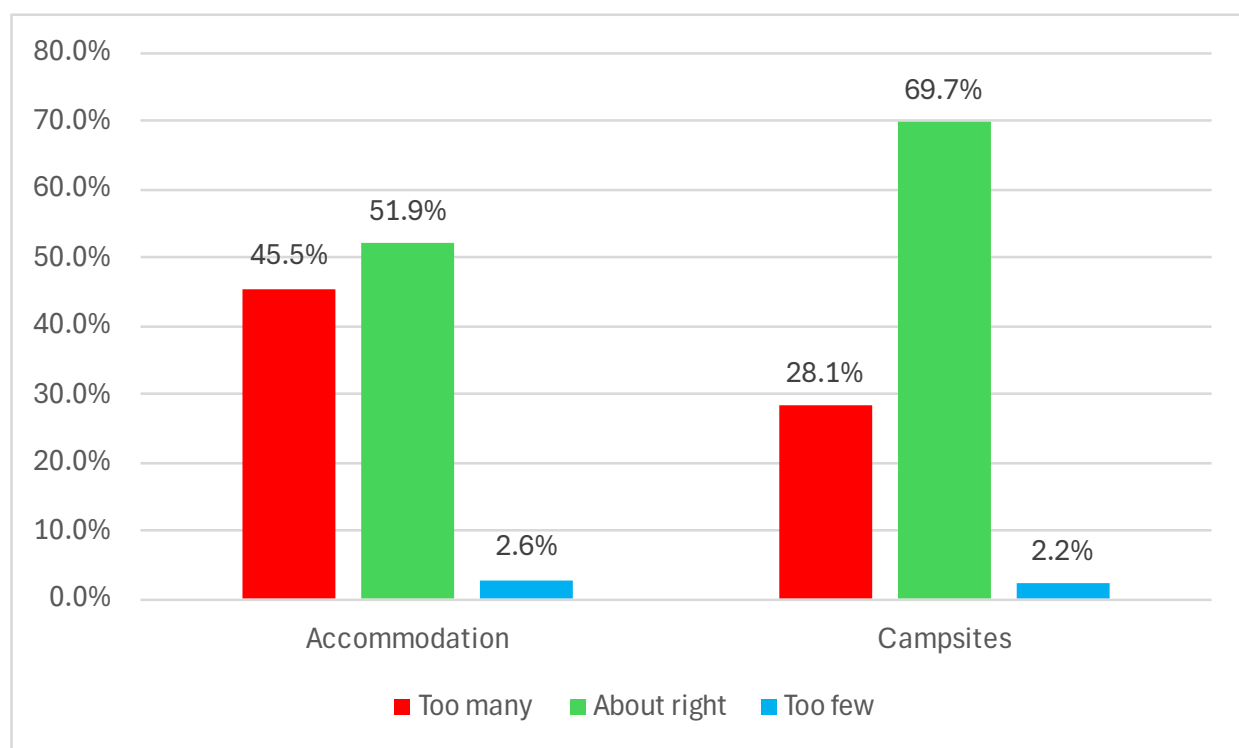


Figure 10: Do you think the current amount of holiday accommodation and camping facilities is too many, about right, or too few?

3.7 The prevalence of second homes was a major concern for the NP respondents, with views expressed that there should be limitation placed on second home ownership. In response to the question: ‘Would you agree with a primary residence status for new homes within our parish council area?’ 83% were in support.

3.8 In comments, respondents suggested a need to balance tourism with local needs, so employment levels are maintained for those working in hospitality, but not at the detriment of the local experience or

housing stock. Also ensuring there is sufficient infrastructure to meet the needs of increased populations in holiday season by the inclusion of public toilets, more retail outlets and better road signage

- 3.9 Over 96% percent of respondents felt that farming plays an important role within the parish. 89% thought that there should be restrictions on development of agricultural land to protect farming and the rural nature of the countryside.

## 4. Key issues and implications for the NDP

- 4.1 Figure 11 summarises the key issues that have arisen in this analysis and the implications of them before recommending key objectives for the NDP and policy intentions that should support them.

### Figure 11: Key Issues arising from the evidence base and implications for the NDP, with recommendations for policy areas and objectives.

#### Key Issues

- National and local policy is that Planning should:
  - focus on sustaining existing and new businesses and the traditional industries of, farming and minerals, and also supporting ability to work from home.
  - long-term protection of sites allocated for employment use should be avoided where there is no reasonable prospect of a site being used for that purpose.
  - Provide for new employment development that is located either within or well-integrated to ... villages well served by public transport and communications infrastructure.
  - Also recognise that sites to meet local business and community needs in rural areas may have to be found adjacent to or beyond existing settlements, and in locations that are not well served by public transport. In this case they should be sensitive to surroundings, not have an unacceptable impact on local roads, and exploit opportunities to make a location more sustainable.
  - Encourage the use of previously developed land, and sites that are physically well-related to existing settlements, where suitable opportunities exist.
- **The Cornwall and Isles of Scilly (CloS) Industrial Strategy** is focused on achieving a decarbonised and sustainable future for business. The Strategy vision is that:

*‘In 2030 the Cornwall and Isles of Scilly creative and carbon-neutral economy will be realising opportunities for its people, communities and businesses to thrive, benefiting the environment and providing an outstanding quality of life for all’.*
- St Mawgan in Pydar parish has a high proportion of retired economically inactive people than is usual. Many of these will be people enjoying a larger than typical retirement income.
- Fewer people are in employment than is typical, and of those that are, the proportion of part timers is higher than average
- Recent data suggests that unemployment is low in the Parish.
- Residents’ jobs are mainly in public administration, education and health and distribution, hotels and restaurants.
- The Parish has a higher than usual proportion of small employers and own account workers, and people in higher and lower managerial, administrative and professional occupations
- Overall, this data reflects a very high level, proportionally, of people running their own businesses, reflecting the rurality of the area on an attractive coast, and the location close to St Mawgan Airport with its employment sources and relatively rapid links with major cities, and the relatively easy access to Cornwall’s major employment areas.
- About 47% of residents’ jobs are within the Parish or very near to it.



- Some 35% of adults in employment worked from home, which is higher than for England (32%) and much higher than Cornwall (25%). This is likely to grow in future and is good for the local economy and tackling climate change. WFH can however be detrimental to residential amenity and environment when it expands.
- Tourism is a major business in the Parish and makes an important contribution to local prosperity. However it tends to be seasonal and subject to mid-term fluctuations caused by changes in wider economic forces.
- Also, there is concern amongst residents that tourism may be exceeding the social and environmental carrying capacity of the area.
- Local residents feel that the Parish's unspoilt coastal features and character was what attracted tourism and that traditional family beach holidays were the type of tourism that suited the nature of the local area, along with walking and surfing holidays. Harm to this coastal character could disadvantage tourism.
- NDP Housing evidence suggests that tourism in the form of second homes and airBnB was restricting access for local people to housing, and impacting on the viability of services.
- Residents felt a need to balance tourism with local needs, so employment levels are maintained for those working in hospitality, but not at the detriment of the local environment or access to housing.
- There was a perceived requirement to ensure that sufficient infrastructure was available to meet the needs of increased populations in holiday season.
- Although broadband access is very variable, the Parish is in the area of the Wildanet Project Gigabit which will eventually see the area able to access ultra-high speed internet [1000mbs].
- Agricultural business is important for both the employment potential and its stewardship of the local landscape, biodiversity, heritage and recreational resources that benefit the Parish residents and visitors.

### Key Objectives for the Neighbourhood Development Plan

- **Preserve Mawgan Porth's Character:** Maintain the unspoilt, family-friendly nature of Mawgan Porth as a coastal resort, ensuring a balance between tourism, the needs of the year-round local community, environmental sustainability, and the area's unique sense of place.
- **Support Economic Growth:** Promote a diverse and thriving local economy by enhancing employment opportunities and supporting businesses at all stages, from start-ups to established enterprises.

### Recommended Neighbourhood Development Plan Policy

- The high level of people in the small employers, own account and managerial etc roles, retired people with higher levels of 'unearned' income (i.e. private pensions etc) and of self-employed people may be seen as an indicator of greater wealth and better 'life chances' amongst the community. It is important to note that there may be, however, a core of younger adults on lower incomes whose needs must be supported.
- There is a need to ensure that growth in working from home occurs without detriment to residential amenity and environment.
- There is concern amongst residents that tourism may be exceeding the social and environmental carrying capacity of the area. Therefore, NDP policy should support tourism development that makes best use of the area's assets whilst providing care for them and maximises accessibility for residents to those facilities and features in the Parish that attract visitors, whilst offering protection to the special landscape and heritage character of the area. This would be in line with the Cornwall Industrial Strategy.
- NDP Policy should help to ensure that sufficient infrastructure is available to meet the needs of increased populations in holiday season.

- Greater diversity of workplaces and jobs within the Parish may help reduce reliance on tourism, which tends to be seasonal and subject to mid-term fluctuations. NDP policy support sites for new small-scale rural workshops and retail, possibly including space to support live/work, home businesses and/or start up business, which must be sensitive to their surroundings and local road conditions.
- The use of previously developed land, and sites that are physically well-related to existing settlements, should be encouraged where suitable opportunities exist.
- It is appropriate for NDP policy to support the diversification of agricultural and land based rural businesses in ways that protect and enhance the special qualities of the area.
- Steps to encourage take up of Broadband connectivity through new development should be supported.

