Topic Area: Local Economy

What we sought to find out:	**Local Economy**
Employment	*What do people do to earn a living?*
	To what extent is unemployment or under-employment a local issue?
	Where are the jobs? And what are they?
	What is the impact of commuting?
	What local skills are there?
	What are the employment and training needs?
	What are the prospects for young people and those with special needs?
	Is there a need for more local employment?
	Is there adequate space for businesses to grow?
	Is there a demand for people to work from home?
	Are there particular infrastructure needs to support home working?
Retail and Commerce	*Should the town centre retail function be protected and enhanced?*
	What are the retail trends?
	Is there a need of more out-of-town retail opportunities?
	What can be done to improve the retail experience?
	What are the local business trends and opportunities?

Introduction

The Neighbourhood Plan offers the opportunity for the people of the three parishes to direct developments during the period from 2015 to 2030 towards outcomes that matter to them, such as their quality of life and prosperity. It also presents the town and its neighbouring parishes with the chance to lay a foundation for sustaining the core qualities of the area. This component of the Evidence Report concentrates upon the foundations for a sustainable economy – an issue that overlaps with many other areas of the Plan, such as Transport and Housing.

The Neighbourhood Plan exists within the wider policy framework and local plan for Cornwall, and these are first summarised. The current economy of the three parishes is then characterised from routine data as well as data collection exercises arising from the neighbourhood planning process. Those organisations with whom we have consulted are listed in the Appendix.

Policy Context

Cornwall and Isles of Scilly Local Economic Partnership (LEP)

The overarching framework for economic policy is provided by the Local Economic Partnership (LEP). Its policy document[1] states that: "*We want to promote new ways of working so that businesses can compete and reach their potential whilst enjoying everything that is special about living in Cornwall & Isles of Scilly. We are guided by the principle that Cornwall & Isles of Scilly must retain and build on our special and unique assets. Perhaps more than at any time in our history, technology and global trends are conspiring to make our natural assets a source of real competitive advantage.*"

In practical terms the LEP seeks to enhance prosperity in Cornwall and to end its poor economic performance whereby the per capita GDP is currently below 75% of the EU average. To achieve its target per capita incomes need to increase by some £1,500 per annum. As we show below, the Wadebridge area is not greatly dissimilar for the Cornwall average. However the neighbourhood planning process provides the opportunity to raise the question of whether the Wadebridge area, with its special opportunities, should not aspire to the England average, rather than the more modest Cornwall aspiration.

[1] Economic Growth Strategy for Cornwall and Isles of Scilly, 2012-20, Local Enterprise Partnership, 2012

The National Planning Policy Framework (NPPF)

Although a community-led plan, the Neighbourhood Plan needs to have regard to national planning guidance and in general conformity with the local planning authority's strategic policies. The Government's national planning policies for England are set out in the NPPF. The Framework advises that neighbourhood plans should plan positively to support local development. One of the core planning principles is that planning should proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. *Significant weight should be given to the need to support economic growth through the planning system*.

The Framework advises that plans should include polices to support the viability and vitality of town centres; there remains a broad presumption that main town centre uses should be accommodated in town centres, rather than edge of centre locations.

Planning policies should support economic growth in rural areas in order to create jobs and prosperity by taking a positive approach to sustainable new development. Neighbourhood plans must be in general conformity with the strategic polices of the Local Plan. To facilitate this, local planning authorities (LPAs) should prepare and ensure that an up-to-date Local Plan is in place as quickly as possible.

The Cornwall Local Plan

The Neighbourhood Plan for the Wadebridge area is subsumed within the Cornwall Local Plan, 2010-2030[2], which seeks to *"achieve a leading position in sustainable living … to support sustainable development. Ultimately this is a balance of decisions around economic, social and environmental issues to meet our present day needs while not compromising the needs of future generations."*

Relevant economic policies in the Cornwall Local Plan include:

- ***Presumption in favour of sustainable development*****:** as contained in the National Planning Policy, Local Plan, and accord, where relevant, with policies in the NP.
- ***Key targets and Spatial Strategy***: New development should provide the most sustainable approach to accommodating growth; making the best use of infrastructure and services whilst respecting the character of Cornwall; 8,000sq.m of additional employment floor space is anticipated for Wadebridge and Padstow combined (4,000sq.m of B1 office accommodation and 4,000 sq.m of industrial space.)
- ***Role and Function of Places***: Wadebridge is included amongst areas for new development of larger scale community, cultural, leisure, retail, utility, employment and residential development.
- ***Shopping, services and community facilities***: Retail and commercial development outside existing centres must demonstrate a need and should exert no significant harm upon the viability and vitality of the existing centre.
- ***Jobs and Skills***: economic growth development proposals will be supported where they contribute to: high quality sustainable tourism with better wages and longer season; marine related employment; education facilities that improve the training and skills base; and encourage knowledge based businesses and creative industries.
- ***Renewable and Low Carbon Energy***: Increase use and production of renewable and low carbon energy generation development proposals with particular support for developments that are led by, or meet the needs of, local communities – and take into account the impact upon landscape.

[2] Cornwall Local Plan: Strategic Policies Pre Submission Version, Cornwall Council, Mar 2013

Current Economic Situation

Cornwall's economy is considered small when compared with other regional economies in the South West. "*It has relatively few economically active people, its businesses are small and it relies disproportionately upon business sectors with low GVA value, such as tourism, agriculture, retail and food.*" [3]

GVA (Gross Value Added) is a long term indicator of the value of an economy in an area. It consists of the value of all products and services minus the cost of producing them. Gross value in 2011 in Cornwall totalled £7.5 billion but gross value per head, in 2011, was £13,848 compared with £19,093 in the South West region and £21,368 in the UK as a whole. The value per capita in Cornwall is just 63% of the national average, the lowest county performance in the country[4].

Analyses of the county's economic performance suggest that improvement will only be possible by:

- An increase in the level of activity (more businesses and jobs)
- A shift in the type of activity (into higher value industries such as advanced manufacturing, digital business, renewable energy and financial services)
- An increase in productivity (better trained workforce, technological innovation)

But improved GVA via, for example, improvements in productivity, should not necessarily be the sole measurement of economic performance. "*The purpose* [of improving the wealth of an area] *should not be the pursuit of growth for its own sake….but as a tool to address social inequality and disadvantage and to achieve economic wellbeing for all.*"[5]

The Local Economy

Small settlement areas such as the Wadebridge area are considered vital to the county's economic health. The Taylor Report[6] found that 80% of the county's GVA is generated from small scale activity in local economies. Wadebridge and its surrounds is not solely a dormitory town populated by people who work elsewhere – the area generates and provides work and earnings for many of its residents, as well as attracting employees from outside.

The Neighbourhood Plan offers local residents the opportunity to consider how the local economy can be improved and made more resilient. These might include:

- The attraction and encouragement of new businesses and jobs.
- Improving the skills of the workforce
- Broadening the economic base to diversify from dominant low value sectors
- Introducing new skills and technologies
- Improved and higher speed broadband services
- Improve the quality of jobs in order to attract some of those who commute out to stay

[3] Cornwall Employment Land Review 2012
[4] Living Working Economy, the Taylor Review of the Rural Economy and Affordable Housing, 2009
[5] 'Is rapid economic growth the right target?', Cornwall Council Intelligence Unit, Jan 2010
[6] Living Working Economy, the Taylor Review of the Rural Economy and Affordable Housing, 2009

Nature of Local Businesses

The range of local occupations is shown here in relation to numbers of businesses by sector for the Wadebridge & Padstow Community Network Area:

Occupations by Business Sector, Wadebridge & Padstow CAN 2011		
Sector	**No's**	**%**
Agriculture, Forestry & Fishing	215	17.3
Retail	195	15.7
Accommodation & Food Services	165	13.3
Construction	160	12.9
Business Administration & Support Services	75	6.0
Professional, Scientific & Technical	65	5.2
Arts, Entertainment, Recreation and Other Services	60	4.8
Production	50	4.0
Property	45	3.6
Health	45	3.6
Wholesale	40	3.2
Transport & Storage (Including Postal)	35	2.8
Motor Trades	30	2.4
Information & Communication	20	1.6
Finance & Insurance	15	1.2
Public Administration & Defence	15	1.2
Education	15	1.2
Total	**1,245**	**100**

It is difficult to isolate statistics for the neighbourhood plan area from within those for the wider community network area above[7]. It is reasonable, however, to assume that the proportion of 'Retail' businesses are higher within the Wadebridge area – and 'Accommodation & Food Services' forms a lower proportion.

Most of the local businesses are small:

85% employ 0-9 persons;
9% employ 10-20 staff and
6% employ 20 or more.

Of the VAT registered businesses, the proportion of micro businesses (0-9 employees) is slightly lower than the Cornwall average (88.7%).[8]

Businesses are relatively well-established: 50% are more than 10 years old; only 17% are less than 2 years old. However it is noteworthy that the proportion of businesses less than 2 years old is lower in this area than for Cornwall as a whole (20%), presumably because of the substantial inward investment programme elsewhere in Cornwall - from which the Wadebridge area has benefitted little.

"The main employment sectors in Wadebridge town in 2011 were wholesale & retail trades, repair of motor vehicles followed by human health & social work activities, construction, accommodation & food service activities and education".[9]

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[7] Wadebridge & Padstow Community Network Area, Cornwall Council

[8] Cornwall's Economy at a Glance, Community Intelligence Paper, Cornwall Council, January 2013

[9] Growth Factors: Wadebridge & Padstow Community Network Area, Cornwall Council, Feb 2013 Version 2

Individuals' Occupations

The numbers of employees in each sector is shown below, excluding agriculture for which data are not collected in this form. There are approximately 30 farms situated within St Breock and Egloshayle parishes.

Wadebridge Area Employees by Sector 2011				
Employees	Wadebridge Area		Cornwall	
Industry	**No.**	**(%)**	**No.**	**(%)**
Retail	1,200	23	26,200	14
Accommodation & Food Services	1,000	19	25,300	13
Manufacturing	400	8	17,300	9
Education	400	8	19,700	10
Health & Social Care	400	8	27,000	14
Construction	300	6	9,300	5
Wholesale	200	4	7,700	4
Professional, scientific & technical	200	4	8,700	5
Business administration & support services	200	4	8,400	4
Public administration	200	4	8,500	4
Arts, entertainment, recreation & other services	200	4	10,900	6
Motor trades	100	2	3,900	2
Transport & Storage (inc postal)	100	2	8,000	4
Information & communication	100	2	2,500	1
Financial & insurance	100	2	2,700	1
Property	100	2	2,800	1
Total	**5,200**		**191,900**	

Source: NOMIS, Business Register and Employment Survey 2011

"In terms of employed people, the key sectors in the area are wholesale & retail trades/repair of motor vehicles and accommodation and food service activities".[10]

The most significant trend is the dominance of retail, accommodation and food services in the local economy. These sectors were the main drivers of Cornwall's high, pre-recession economic growth - and they continue to grow.

Between 2008 and 2011 Cornwall saw a 14% increase in people working within 'Accommodation and Food Services'[11]. But these employment sectors are characterised by low wages, high proportions of part time work, insecure terms and conditions of employment and seasonality. Only 45% of jobs within this sector are full time[12]. As is the case in much of Cornwall, employment within accommodation and food services is predominantly visitor-related.

The proportion of employment within the health sector is significant. Much of this work will be within the care sector in which the average worker in Cornwall is paid £6.60 per hour and £2.65 for those who are apprenticed[13]. This is a material consideration in imminent job creation in the neighbourhood area, given the prospective construction of a large care 'village' off West Hill which may offer employment to up to 100 persons (see planning in the pipeline below).

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[10] Growth Factors: Wadebridge & Padstow Community Network Area, Cornwall Council, Feb 2013 Version 2

[11] Business Register & Employment Survey DEFRA 2012

[12] Worklessness Assessment, Cornwall Council Intelligence Unit, Cornwall Council

[13] Cornwall Adult Social Care Launch 7th Nov 2013

"Social care is a sector that is predicted to grow by 25% to meet the needs of an increasing number of older age people."[14]

In the retail sector, which is another significant source of employment in the county and the Wadebridge area, over 70% of employment is part time, under 30 hours per week. This sector is, like the social care industry, characterised by a high proportion of female employees.

Tourist-related jobs account for 25% of all employment in Cornwall[15] and, of the County's six former district council areas, North Cornwall derives the highest activity and income. Although the Wadebridge area is not a main location for overnight or longer stays, it acts as an important day trip destination for holiday makers, for shopping, cycle trips etc.

<u>North Cornwall Tourism Key Facts[16]:</u>

- 1,072,000 Staying visitor trips
- 5,931,000 Staying visitor nights
- £342,476,000 Staying visitor spend
- 2,864,000 Day visits
- £92,494,000 Day visitor spend
- £434,970,000 Direct visitor spend
- £7,265,000 Other related spend
- £442,235,000 total visitor related spend
- 10,917 Estimated actual employment
- 7,782 FTE employment
- 29% Proportion of all employment

There is clearly potential to achieve even higher value in the retail and tourism related industries, although this may not be consistent with achieving the Wadebridge area's full economic potential.

By contrast, between 2008 and 2011, some employment sectors, according to NOMIS[17], saw considerable reductions in numbers of employees:

- Public Administration (-22%)
- Property (-22%)
- Arts, Entertainment & Leisure (-19%)
- Agriculture, Forestry & Fishing (-9%)
- Construction (-4%)

Farming Sector

There are thirty farms within the neighbourhood plan area. The vast majority are small to medium sized (100 – 500 acres). With one exception they are livestock-based. About half of the farms devote themselves exclusively to dairy farming, a quarter focus upon the production of beef and lamb. The remainder practice mixed dairy and livestock farming. All farms in the neighbourhood plan area are owner managed, with the exception of one council owned farm in the Camel Valley. According to the 2011 Census' Occupation' data just over 100 residents in the Wadebridge area were employed in agriculture and related trades.

Local figures are hard to find but figures sourced from DEFRA's analysis of farmer's income paints a bleak picture. The Farm Business Income report for the twelve months to February 2013 states that:

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[14] Growth Factors: Wadebridge & Padstow Community Network Area, Cornwall Council, Feb 2013 Version 2
[15] Value Of Tourism 2011 – Visit Cornwall
[16] Value Of Tourism 2011 – Visit Cornwall
[17] NOMIS – official labour market statistics, Office for National Statistics

"Across most farm types farm business income fell in 2012/13 (the exceptions being specialist pig and poultry farms) as the effect of the poor growing season and harvest was felt across both the cropping and livestock sectors. The highest falls were on dairy and grazing livestock farms where higher feed costs were a key factor. Overall income was down by 32 per cent, with livestock and dairy producers hit by a 50 and 43 per cent drop respectively."[18]

DEFRA's National Statistics show that, in the South West region, the costs of agricultural production rose by 50% between 2005 and 2012.[19]). In the five years to 2011, energy and lubricant costs rose by 32%, fertilisers by 48% and animal feed by 33%.

The University of Exeter undertook a review of the Cornish food industry in 2011[20]. Its main findings by sector were:

Dairy

Trends - Decline in dairy herd halted. Continuing increase in yields and concentration of production into fewer, larger units. Improvements in milk prices but widespread cost-price squeeze. Rising costs, particularly energy costs stimulating interest in renewable energy.

Critical issues and support needs - Businesses seeking to grow out of county sales and develop new products. Support needed for NPD, capital investment, sales and marketing, and transport and distribution.*

Meat

Trends - Beef numbers now back to pre-FMD levels and sheep numbers back to level of 30 years ago (prior to distortions associated with the CAP). Strong lamb trading has seen some producers return to this sector.

Critical issues and support needs - Opportunities for developing export market. Input prices (particularly energy and feed) squeezing margins. If price rises not passed on here could be difficult trading conditions ahead. Increasing prospect of bad debt means close monitoring of finances required. Need to reduce energy costs and develop renewable solutions.

Horticulture

Trends - Strong focus on local supply for smaller scale producers. Increasing international competition. Businesses adversely affected by poor weather over last two years

Critical issues and support needs - Opportunities for development of onion production subject to climatic conditions. Opportunity provided by Morrisons 'pack-house' at Bridgwater. Escalating transport costs are contributing to cost-price squeeze. Businesses are looking to add value to products and identify fuel/energy solutions. Close attention to credit control needed as the potential for bad debt rises

Poultry and eggs

Trends - Continuing strong focus on Cornish market. Reduced margins due to rising input costs.

Critical issues and support needs - May be some expansion in to regional and national markets alongside NPD. Need for tight credit control. Energy costs are a concern and businesses are actively seeking alternatives.

Beverages

Trends - A diverse sector somewhat at risk as a result of reduced discretionary spend. Evidence of declining spend by tourists and local restaurants and independent retailers.

Critical issues and support needs - Plans to expand out of county sales dependent on finding transport and distribution solutions and require sales and marketing assistance. Access to borrowed funds is difficult.

Confectionery

Trends - A dynamic sector currently facing input cost inflation alongside stable or declining orders. Some evidence that top end of market less affected.

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[18] Farm Business Income, DEFRA report 2013

[19] Farm Business Survey, DEFRA, 2011/12

[20] A Review of Cornwall's Agri-Food Industry: Final Report, CRPR Research Report No 32, University of Exeter, 2011

Critical issues and support needs - Very expansionary outlook targeting regional & national markets. Support needs associated with this include establishing routes to new markets, sales and marketing, and capital investment.

Baked products

Trends - A very significant sector in terms of employment and turnover but facing declining sales and squeezed margins. NPD cited as means of offsetting declining sales. Some niche markets report growth. Local market becoming more crowded.

Critical issues and support needs - Confident and optimistic outlook associated with plans to grow out of county sales. Access to borrowed funds often difficult and expensive. Transport and distribution logistics remain a challenge for smaller businesses seeking to grow out of county sales.

Preserves and Misc.

Trends - Largely (but not exclusively) focused on Cornish market supplying independents, farm shops, restaurants and end consumers. Trade heavily on 'Cornishness' of products. Reduced consumer spend coupled with rising costs of inputs is squeezing margins.

Critical issues and support needs - Some evidence that local market becoming too crowded. Potential for expansion into national and international markets. Support required for capital investment, sales and marketing."

The most significant conclusion the University of Exeter reached in 2011 was perhaps: *"One of the most striking developments since our last review is the widespread interest in alternative energy sources. This is largely fuelled by a desire to offset the impact of significant energy cost inflation but also for some, recognition of the importance of improving the environmental sustainability of their business. Regardless of motivation, there appears to be significant potential for greening the energy infrastructure of the sector. This may involve solar and wind energy but also the generation of energy from biomass and the sector's food waste, thus reducing/recycling food waste and generating green energy at the same time.*

Options such as this, which have the potential to both reduce costs and create new income streams, could provide one solution to the sector's current struggle with cost-price pressure. This could also offer an important new marketing angle for Cornwall's agri-food sector but action needs to take place now in order for the county to gain a competitive advantage in terms of green energy. The absence of a stable and consistent national policy is unhelpful, although strategic planning at the county scale could generate the 'first to market' edge consistent with Cornwall's reputation in the wider UK agri-food economy. This would involve food business leaders in order to explore requirements and potential support needs and, importantly, how best to inform and communicate with the sector as a whole."

A recent letter from the Chair of the local young farmers, after consultation with colleagues, reflects some of the concerns and challenges our farming community currently has:

"*Unbeknown to those outside of agriculture, the farming community is quite unique. We are not only bombarded with rules and regulations; we are often price takers and not price makers. We invest for the future which means not just for the next generation but further than that. The system and ethics that farmers adopt are proven to work looking after the countryside and producing quality food for all to enjoy.*

The attractions are clear working in the open in all weathers we have the opportunity grow crops for animal and human consumption. Harvest is the most rewarding time and we have great pride producing crops and livestock to help feed the population.

The area we live is so attractive with Wadebridge so close with its shops sports facilities, schools, tourist attractions all making Wadebridge and surrounding villages the place to live. The countryside…. plays its part.

Agricultural occupancy can also be an issue. [Properties being sold] ….. *far out of reach for young farmers or retired farmers for whom the original planning was granted- this issue must be looked into in the future*

We see real opportunities for farming in the future. Renewables are a must….. all we are doing is harvesting the wind and sun, something we are born to do, and any income generated will be spent in the local area benefiting all. Tourism is also a great source of income and all forms should be encouraged once again bringing much need revenue to the area .
The most immediate threat to livestock farming in this area and most of Cornwall is TB in cattle ,on our own farm we have been under restriction for the last 8 years bringing not only stress to the animals but also to ourselves. The situation shows now signs improving which is a real concern"[21].

Although most of the difficulties facing the farming community are beyond the scope of a neighbourhood plan, there are two planning /land use issues that require addressing. The vast majority of the neighbourhood plan area's farms are family owned and have been so for generations. Given the nature of family succession within this sort of business, the needs of future generations are paramount. The neighbourhood plan should appreciate the need to build accommodation for family members on farms and that initiatives to diversify farms' income (including renewable energy projects) should be encouraged. Examples of developments which would be beneficial to Cornwall's carbon emissions target are not confined to solar and wind developments. They include anaerobic digestion, heat pumps, biomass and advanced energy from waste initiatives.

Employment Sectors
Professional, scientific & technical occupations are more poorly represented in the Wadebridge area than in the rest of Cornwall. There is clearly potential to move from the current low base in arts, entertainment, recreation & other services.

A complementary picture emerges from 2011 census data about occupations. Managerial and skilled occupations are in general better represented among residents of ESBW than in the rest of Cornwall.

Census 2011 - Working Residents by Occupation		
Occupation	**Cornwall**	**Wadebridge Area**
Managers, directors and senior officials	11.4 %	13.3 %
Professional occupations	13.8 %	12.7 %
Associate professional and technical occupations	10.4 %	8.6 %
Administrative and secretarial occupations	9.5 %	8.7 %
Skilled trades occupations	17.0 %	19.4 %
Caring, leisure and other service occupations	10.6 %	9.8 %
Sales and customer service occupations	8.2 %	9.0 %
Process plant and machine operatives	7.1 %	5.3 %
Elementary occupations	12.0 %	13.2 %

Employment Profiles
Our neighbourhood area differs in certain respects from the Cornwall average: we have slightly less full-time work, unemployed, full-time students, long-term sick or disabled; and slightly more self-employed and retired.

Census 2011 – Residents by Employment Status (%)		
Employment Category:	**Cornwall**	**Wadebridge Area**
All usual residents aged 16 to 74	100.0	100.0
Economically active	66.7%	66.5%
In employment	60.7%	61.5%
Employee: Part-time	15.4%	15.8%

[21] Email from Samuel Hodge, Chair of Wadebridge Young Farmers, Dec 2013

Employee: Full-time	31.7%	29.9%
Self-employed	13.6%	15.9%
Unemployed	3.3%	2.8%
Full-time student	2.8%	2.1%
Economically Inactive	33.3%	33.5%
Retired	18.9%	21.0%
Student (including full-time students)	4.3%	3.3%
Looking after home or family	4.0%	3.6%
Long-term sick or disabled	4.4%	3.8%
Other	1.7%	1.8%
Unemployed	%	
Age 16 to 24	1.0%	0.9%
Age 50 to 74	0.7%	0.8%
Never worked	0.3%	0.2%
Long-term unemployed	1.2%	1.0%

The main difference between Wadebridge and the two parishes is a higher proportion of economic inactivity, mainly due to higher proportions of retired individuals. This is reflected in the table below:

Census 2011 – Employment Status by Parishes								
Economic Activity 2011	**St B**		**Eglo**		**Wade**		**NP Area**	
	No.	%	No.	%	No.	%	No.	%
All Usual Residents Aged 16 to 74	554	100	303	100	4684	100	5541	100
Economically Active; Employee; Part-Time	81	14.6	48	15.8	798	17.0	927	16.7
Economically Active; Employee; Full-Time	146	26.3	70	23.1	1482	31.6	1698	30.6
Economically Active; Self-Employed	142	25.6	74	24.4	626	13.4	842	15.2
Economically Active; Unemployed	11	2.0	10	3.3	130	2.8	151	2.7
Economically Active; Full-Time Student	9	1.6	4	1.3	115	2.5	128	2.3
Economically Inactive; Retired	106	19.1	54	17.8	945	20.2	1105	19.9
Economically Inactive; Student	18	3.2	16	5.3	153	3.3	187	3.4
Economically Inactive; Looking After Home or Family	18	3.2	14	4.6	151	3.2	183	3.3
Economically Inactive; Long-Term Sick or Disabled	12	2.2	10	3.3	194	4.1	216	3.9
Economically Inactive; Other	11	2.0	3	1.0	90	1.9	104	1.9
Unemployed; Age 16 to 24	3	0.5	4	1.3	47	1.0	54	1.0
Unemployed; Age 50 to 74	2	0.4	3	1.0	34	0.7	39	0.7
Unemployed; Never Worked	2	0.4	1	0.3	11	0.2	14	0.3
Long-Term Unemployed	4	0.7	5	1.7	45	1.0	54	1.0

The 2011 Census data shows that, within the neighbourhood plan area, 67.5% of all residents between the ages of 16 and 74 are economically active.

Earnings and their Impact

In 2012 average full time earnings in Cornwall are £22,087, which is significantly below the national average of £26,551[22]. Given the predominance of low paid employment within the Wadebridge area, the gap is likely to be even greater if an analysis of all of the jobs were possible.

While the issue of housing is for another section of the evidence report, the difficulties arising for people living in a low wage economy with high house prices warrants mention. The figures below illustrate that

[22] Cornwall's Economy at a Glance, Cornwall Council, Jan 2013

this problem is significant within the neighbourhood plan area. The figures are sourced from HM Land Registry, The Right Move property web site and our own analysis. There were too few identifiable sales in the two parishes to warrant their inclusion in the House Prices 2011 table below.

	Wadebridge	NP Area	Cornwall	UK
Average house price	£232,257	£277,714	£182,424	£167,063

House Prices 2011 Wadebridge		
	Av. Sale Price	**Rental Value Per Month**
4 bed detached house	£328,233	£1225
3 bed detached house	£291,000	£800
4 bed semi-detached	£269,000	£800
3 bed semi	£209,000	£730
2 bed semi	£166,617	£630
4 bed terraced	£356,244	
3 bed terraced	£191,985	£800
2 bed terraced	£162,814	£700
1 bed terraced	£107,500	£490

Only Kensington and Chelsea (London's wealthiest borough) shows a greater differential between average wage and average house price than the North Cornwall area. The impact of this affordability mismatch upon the local economy is considerable. Young people face a struggle to live and work in the area in which they grew up. Businesses find it hard to recruit staff, a problem exacerbated by poor public transport and rising fuel costs.

We have no local statistics to guide us but across Cornwall there is "*a very high level of self employment locally, the fourth highest in the country. However, the overall drop in the number of VAT and/or PAYE Business profile 1registered businesses (-4.1% 2008-2011) reflects the local impact of the recession.*[23]

Unemployment and Worklessness

Being out of work can have a severe impact on an individual's quality of life – both in terms of the economic implications and the risk of social isolation and exclusion. The impacts will be felt not only by the individual, but also by partners and dependent children.

The most recent indicators of 'worklessness' (people out of work who are unemployed, or who are unable to work due to sickness) have been sourced from DWP[24] data for the Wadebridge area.

Benefit Claimants Wadebridge Area May 2013		
	No.	**%**
Total claimants	490	-
Job seekers allowance (JSA)	70	14.3
ESA and incapacity benefits	255	52.0
Lone parents	35	7.1
Carers	50	10.2
Others on income related benefits	10	2.0
Disabled	55	11.2
Bereaved	15	3.1

[23] Cornwall's Economy at a Glance, Cornwall Council, Jan 2013
[24] DWP = Department of Work & Pensions

Unknown	0	0.0
Male	210	42.9
Female	280	57.1
Age - 16 to 24	55	11.2
Age - 25 to 49	240	49.0
Age - 50 and over	195	39.8

Job Seekers Allowance Claimants Wadebridge Area May 2013		
	No.	**%**
total claimants	70	
age - 16 to 24	15	21.0
age - 25 to 49	35	50.0
age - 50 and over	20	29.0
gender - male	35	50.0
gender - female	35	50.0

Although the Wadebridge & Padstow Community Network Area has the lowest rate of JSA claimants in the county, such statistics can disguise an area's true level of worklessness – and untapped potential within the working age population. Analysing worklessness by claimants alone ignores the large numbers of people who are workless but not claiming; a gap which has grown faster in Cornwall than in the rest of the country.[25] People who are workless but not claiming benefits may be unaware of their entitlement; be in full time training or education; have taken early retirement; or made a life choice. This is confirmed by the EMMU[26] October 2013 report: of 2,220 individuals across the county who 'signed off' JSA, only 43% were accounted for as having found a job.

Taking all out of work benefits into account, including Employment Support Allowance and Incapacity Benefit for those whose ability to work is limited by disability or ill health, <u>12% of the neighbourhood area's</u> workforce were claimants in August 2012.

[25] Community Intelligence Worklessness Assessment 29August 2012
[26] EMMU = Economic Monthly Monitoring Update, Oct 2013

Wadebridge Area Income Support Claimants November 2013	
total claimants	100
age - 16 to 24	10.0%
age - 25 to 49	50.0%
age - 50 to 59	35.0%
age - 60 and over	5.0%
gender - male	30.0%
gender - female	70.0%
duration - up to 6 months	10.0%
duration - 6 months to 1 year	10.0%
duration - 1 year and up to 2 years	15.0%
duration - 2 years and up to 5 years	25.0%
duration - 5 years and over	40.0%
partner - with partner	10.0%
partner - single	90.0%
statistical group - incapacity benefits	45.0%
statistical group - lone parents	35.0%
statistical group - carers and others	15.0%

The table below indicates levels of child poverty within the Wadebridge area, using the most recent data available. The figures represent numbers and proportions of children living in families either receiving out of work benefits or in receipt of tax credits where income is 60% of the local average.

Wadebridge Area - Children Under 16 Living in Poverty 2008		
	No.	**%**
Wadebridge East	55	23
Wadebridge South East	50	19
Wadebridge West	55	16
Egloshayle + St Breock	30	14
Wadebridge North East	25	10
Cornwall	16,650	19

Qualifications amongst the Local Workforce

It should be noted that the Wadebridge area has higher levels of persons with no qualifications, and lower levels of level 4 and above than across Cornwall.

Census 2011 – Qualification Levels		
Category	**Cornwall**	**Wadebridge area**
None	22.4%	23.4%
Level 1	13.4%	13.9%
Level 2	17.4%	17.3%
Apprenticeship	4.5%	4.3%
Level 3	13.1%	12.1%
Level 4 and above	25.0%	24.5%
Other	4.2%	4.6%
All	**100%**	**100%**

Young People and the Local Economy

We have been fortunate to have the assistance of Wadebridge School pupils in carrying out a survey of 16-18 year olds in the sixth form at the senior school[27]. One element of the survey asked pupils to anticipate the further education and working lives they hope to achieve *and whether they expect to stay in the area / Cornwall to achieve those aspirations.* The survey response from 58 pupils provides us with a helpful indication as to the ambition of local young people on the cusp of leaving school.

Wadebridge School Sixth Form Survey Autumn 2013			
	Yes	**No**	**D/K**
Do you plan to go to University?	67.8%	13.6%	18.6%
Do you plan to complete an apprenticeship?	5.1%	66.1%	28.8%
do you plan to go straight into employment after sixth form?	23.7%	76.3%	0.0%
Do you plan to work in the local area?	36.2%	63.8%	0.0%

Only 12% of school leavers are planning to undertake further education in Cornwall – 14 at Truro, 4 at St Austell and 4 at Falmouth. 70% of the school's leavers have chosen to undertake further education courses out of the county. It is noticeable that those studying scientific subjects are least likely to stay in county. The school provided data about the immediate destination of sixth form leavers from the school over the past three years. It is a dispersed picture.

One of the Cornwall's most serious challenges, over many years, is the annual exodus of school leavers unable to pursue their chosen University subject close to home. In addition, once they graduate, very few return to the County, thus dividing families and preventing local employers from rejuvenating their workforce. The Combined Universities of Cornwall (based in Falmouth and in receipt of considerable EU convergence funding) was established to tackle the loss of young creative talent and to embrace the opportunities presented by the 'knowledge economy.'

Wadebridge School provided data identifying the immediate destination of its 177 eighteen year old school leavers for the period 2011-13 (see table below). 18% of the children chose either to take gap years or, in the main, go into local employment.

Wadebridge Student HE Destinations 2011-13			
Institutes:	**2011**	**2012**	**2013**
Aberystwyth	1		
Bath	4	2	3
Bedfordshire	1		
Birmingham			2
Bournemouth		1	
Bristol	1		1
Bristol UWE	4	3	2
Brunel		2	1
Cardiff		3	1
Cumbria	1		
East Anglia			1
Essex	1		1
Exeter		1	
Falmouth		4	
Glamorgan		11	
Gloucester	2	2	3
Harper Adams	1		1

[27] Future Wadebridge, School Sixth Form Survey, Nov 2013

Hertfordshire	2		8
Keele	1		
Kings College			1
Loughborough			1
Newport		1	
Nottingham		1	
Open University			1
Oxford Brookes	3		
Plymouth	8	8	5
Portsmouth		1	
Queen Marys, London			1
Reading	2		
Rochester			1
Royal Academy Of Dance		1	
Southampton	1	1	
St Austell		3	1
St Marys, Twickenham	2		
Surrey			1
Sussex		1	
Swansea		1	3
Truro	5	2	5
UCL	1		
University Creative Arts		1	
Warwick		1	
Westminster	1		
Winchester		1	
Wolverhampton		1	1
Worcester		2	
York	1		2

Wadebridge Sixth Form Survey 2013 Expected Career Paths	
Work Area:	**No.**
Teaching	10
Engineering	6
Biology Research	3
Business	3
Don't Know	3
Photography	3
Accounting	2
Acting	2
Computer	2
Environmental	2
Occupational therapy	2
Police	2
Advertising	1
Army	1
Catering	1
Counselling	1
Ecology	1
Electricity	1
Graphic Design	1
Horses	1
Journalism	1

Media	1
Medicine	1
Optics	1
Psychology	1
Social Work	1
Travel Industry	1
Water Sports Instructor	1
Zoology	1

The Employment Market

The problem of a local employment market unable to meet the aspirations of the area's most highly qualified young people is highlighted by a vacancy snapshot taken in early November 2013 and derived from an online search of seven job search engines.

Wadebridge Area - All unfilled Vacancies		
Vacancy Type:	**Jul 2012**	**Oct 2012**
total	**110**	**65**
standard vacancies	106	57
self-employed vacancies	4	8
full-time vacancies	45	42
part-time vacancies	65	23
standard full-time vacancies	41	34
standard part-time vacancies	65	23
self-employed full-time vacancies	4	8
self-employed part-time vacancies	0	0

Wadebridge Area – Notified Vacancies by Occupation Nov 2012	
Corporate Managers	2
Managers and Proprietors in Agriculture and Services	0
Science and Technology Professionals	0
Health Professionals	0
Teaching and Research Professionals	10
Business and Public Service Professionals	0
Science and Technology Associate Professionals	1
Health and Social Welfare Associate Professionals	0
Protective Service Occupations	0
Culture, Media and Sports Occupations	0
Business and Public Service Associate Professionals	2
Secretarial and Related Occupations	0
Skilled Agricultural Trades	0
Skilled Metal and Electronic Trades	0
Skilled Construction and Building Trades	9
Textiles, Printing and Other Skilled Trades	4
Caring Personal Service Occupations	14
Leisure and Other Personal Service Occupations	2
Sales Occupations	0
Customer Service Occupations	0
Process, Plant and Machine Operatives	0
Transport and Mobile Machine Drivers and Operatives	0
Elementary Trades, Plant and Storage Related Occupations	2
Elementary Administration and Service Occupations	8
total	55

Cornwall Works Youth Employment Strategy summarises the issue:
"Evidence from previous recessions suggests that young people (16-24) are particularly vulnerable to becoming long term unemployed and take longer to return to work than people aged 25 plus. The first steps in employment are all important in building confidence, proving employability and in developing long-term skills. The challenge is to ensure that all available resources are used in a way that focuses on the needs, and develops the aspirations of young people, and where relevant their families, and develops employment progression routes."[28]

Countywide employment market data suggests that employment opportunities are falling. Although JSA claimants have fallen in the year to September 2013 (EMMU October 2013) this does not necessarily translate into a more buoyant Cornish labour market, particularly for young people. High vacancy levels can be equally misleading as a proportion will be due to 'churn', arising as people retire or move to new roles with their existing employer.

Drawing upon population data, the EMMU presents a less optimistic picture when the wider labour market is considered: *'the latest figures for June 2013 confirm that employment figures are falling back and unemployment continues to move up'.* Between 2009 and 2012 there has been a decline in the numbers of employees in Cornwall – from 194,500 to 191,000.

An analysis of roles within a thirty mile radius of Wadebridge using www.totaljobs.co.uk identified 160 vacancies, of which forty three (27%) carried salaries of over £22,000. The reality is that a far lower proportion of vacancies offer above the county average but the breakdown of roles provides an insight into the profile of the current *professional* jobs market. The two professions not included in the table are teachers (currently 14 vacancies countywide according to Cornwall Council's vacancy page) and social workers, for whom there is considerable demand.

Jobs in North Cornwall with Remuneration >£22,000 advertised on www.totaljobs.co.uk Oct 2013	
Legal / Accounts	10
Engineering	10
Sales & Marketing	8
IT	5
Retail Management	3
Energy Services	2
Health & Safety	2
Car Mechanics	2
Hotel Management	1
	43

A search of seven job search sites in December 2013 identified thirty two full time permanent vacancies within the Wadebridge neighbourhood area. Only two of the opportunities were aimed specifically at young people (an internship in renewable energy and an apprenticeship in media). Of the remaining thirty roles, only two did not require previous experience.

Job Vacancies Wadebridge Area 1st December 2013	
Construction Worker	7
Care Worker	6
Accounts Assistant	2
Apprentice / Intern	2
Leisure Worker	2
Catalogue Distributor	2

[28] Youth Employment Strategy, Cornwall Works, 2012

Chef	1
Receptionist	1
Library Assistant	1
Sales Consultant	1
Sales Manager	1*
Paramedic	1*
Engineer	2*
Nurse	2*
Pipe Fitter	1*
* = salary of more than £22,000 p.a.	

Data concerning 18 year old Wadebridge school leavers is incomplete but evidence was found of a minimum of seven taking up apprenticeships in the last three years. Of those whose first job was known, 45% were within the tourism industry and 35% within retail.[29]

Alongside Cornwall's seasonal fluctuations in Jobseekers Allowance, unemployment levels have been variable. In March 2011 the Census recorded that 39.2% of households in the Wadebridge & Padstow area contained no-one in employment and of these households 5.5% had dependent children compared to the Cornwall averages of 37.8% and 8.3% respectively. As was shown in the Census tables above, the Wadebridge area has a number of unemployed 16-24 year olds (54 in total at the time of the Census).

When considered alongside the numbers of long term unemployed in the Wadebridge area and those that have never worked, there may be an opportunity for a social enterprise to establish links with local employers in a collaborative effort to provide training and work experience for both young people and the long term unemployed.

Commuting

It is widely believed that more people in Cornwall travel to work by car than in any other part of England. The most extensive study of travel to work patterns in Cornwall we have was carried out in 2005[30]. It used the 2001 Census as the major source of data. This study found that *"travel to work accounts for a high proportion of all journeys made by households in Cornwall. Public transport use is low, but a relatively high proportion of trips to work are made by bike or on foot."* In Wadebridge in 2005, for instance, the travel to work pattern was as follows:

Travel to Work Pattern 2005		
	Wadebridge	Mean*
work mainly from home	11.0%	6.6%
travel by car or van	58.1%	54.0%
travel by foot	18.4%	13.1%
* of 14 Cornwall towns studied		

The average distance travelled to work in 2001 by the working residents of Wadebridge was 9.5 miles (mean across 14 Cornish towns = 8.6 miles)

The Cornwall Towns Study of 2005 found that most of the 14 major Cornish towns were net importers of employment and most satisfied the employment needs of a large proportion of their own residents; although Wadebridge, along with Hayle and St Ives, "*showed the least significance as employment centres and are therefore greater dormitories*". Wadebridge in fact was one of the few towns in the

[29] UCAS Destination Report – Wadebridge School, 2013
[30] The Cornwall Towns Study for Cornwall County Council, by Land Use Consultants in conjunction with Roger Tym Associates, 2005

study that had a negative net flow of employees. Interestingly Bodmin's positive flow featured a significant number of persons from Wadebridge that travelled there to work.

The comparison between towns is shown on the table below:

Cornwall Towns Travel to Work 2005 Self-containment of Cornwall towns as origin & destination				
	total employees	% of working residents that work in the town	% of people working in the town that are residents	Net flow of employees
Newquay	7303	61.3	71.9	-1257
Wadebridge	**2248**	**46.7**	**56.9**	**-489**
Hayle	3482	40.6	48.0	-488
St Ives	3482	62.4	70.3	-437
Fal-Pen	11848	66.1	65.9	39
Liskeard	4030	46.5	41.7	420
Bude	3187	65.2	50.9	703
Launceston	4413	65.8	46.3	1309
St Austell	14858	60.0	45.9	1355
Helston	6722	65.3	48.5	1728
Penzance	9649	68.5	54.9	1916
CPR	18061	62.7	55.2	2184
Bodmin	8715	66.2	41.5	3250
Truro	21019	70.0	30.7	11812

The Towns Study was carried out in conjunction with the emerging regional spatial strategy at the time and made a series of recommendations. Most pertinent to this section is the fact that the study recognised Bodmin as the strongest employment centre in the area. "*Bodmin stands out because of its strong employment role, clearly out of balance with its resident population and any notional hinterland. The town…..has a significant relationship with Wadebridge, which is the weaker partner and relies on Bodmin to a significant extent."* It recommended that Bodmin should be the focus of "*more sustainable employment and housing markets for the town. Wadebridge should be planned as in a functionally significant relationship with Bodmin. More sustainable transport relationships should be sought with St Austell and Wadebridge*".

According to Cornwall Council, Wadebridge does have *"a good travel to work bus service to key centres such as Bodmin and Truro"*[31].

The 2011 Census provides more up-to-date travel to work data. The table below shows that the proportion of Wadebridge residents that travel to work by car or van has increased to 68.8% (from 58.1% in 2001). Egloshayle and St Breock have similar proportions of car and van commuters. Public transport continues to be a very low proportion.

[31] Planning Future Cornwall, Growth Factors, Wadebridge & Padstow CNA, July 2012

Other significant findings from the 2011 Census are:

- the proportion of home working is much higher in Egloshayle and St Breock than in Wadebridge
- in both Wadebridge and Egloshayle around one fifth of working people walk to work
- regular travel to work by bicycle is low
-

Travel to Work, Census 2011									
	Wadebridge		Egloshayle		St Breock		NP Area		E&W
	No.	%	No.	%	No.	%	No.	%	%
Work Mainly at or from Home	182	6.1	30	15.3	57	15.1	269	7.5	5.4
Underground, Metro, Light Rail, Tram	1	0.0	1	0.5	0	0.0	2	0.1	4.1
Train	8	0.3	0	0.0	2	0.5	10	0.3	5.3
Bus, Minibus or Coach	42	1.4	3	1.5	0	0.0	45	1.3	7.5
Taxi	5	0.2	0	0.0	3	0.8	8	0.2	0.5
Motorcycle, Scooter or Moped	24	0.8	2	1.0	2	0.5	28	0.8	0.8
Driving a Car or Van	1,946	64.8	121	61.7	253	67.1	2,320	64.9	57.0
Passenger in a Car or Van	121	4.0	4	2.0	15	4.0	140	3.9	5.0
Bicycle	52	1.7	3	1.5	4	1.1	59	1.7	3.0
On Foot	599	20.0	32	16.3	32	8.5	663	18.5	10.7
Other Method of Travel to Work	22	0.7	0	0.0	9	2.4	31	0.9	0.6
	3,002	100	196	100	377	100	3,575	100	100

The 2012 Community Survey carried out in the neighbourhood plan area asked about people's travel to work habits. The table below shows the response from 493 working persons. Comparing the table with the 2011 Census it suggests that the number of home workers is over-represented and therefore the other percentages may be under-stated. The 45.5% of persons that are working in their home area is very similar to the findings of the 2005 Study. According to the results of the 2012 Community Survey, Around a fifth of 'working residents' (21.5%) travel out of the local neighbourhood but stay within 10 miles of home. Approximately a third of them travel to work in Bodmin.

Community Study 2012 Travel Destination for Local Residents		
	No.	%
Home	70	14.2%
Within NP area	224	45.5%
Within 10 miles	106	21.5%
Rest of Cornwall	80	16.2%
Out of county	13	2.6%
	493	100%

The spread of employment destinations for our working residents is wide and varied. Destinations that attract the higher numbers are:

Community Study 2012 Work Destination for Local Residents			
	%		%
Bodmin	7.7%	Newquay	2.8%
Truro	4.3%	Padstow	2.2%
St Austell	3.0%	Rock	2.0%

The other finding of note from the 2012 survey, perhaps, is that 16.8% of all daily trips to Wadebridge town centre by local residents are work related.

Community Survey 2012 Daily Trips to Wadebridge Town Centre		
	No.	%
Work	166	16.8%
School	137	
Shopping	394	
Bank/Post office/financial services	119	
Library	29	
Healthcare	23	
To eat or drink	42	
Cinema	12	
Church/worship	10	
Sport and leisure	38	
Groups, clubs or meetings	19	
	989	

According to Carshare Cornwall "*most people commute to work by car. The average worker in Cornwall commutes around 4,200 miles per year, which equates to an average annual fuel cost of over £850*."[32]

Wadebridge and District Chamber of Commerce Strategies

Wadebridge and District Chamber of Commerce promotes the interests of local businesses in immediate support as well as through promoting the area more generally. The Chamber is concerned to develop a strategy that will add to the resilience of local businesses during a time of economic uncertainty.

Wadebridge and District Chamber of Commerce noted that the 2004 Wadebridge Town Plan could have been written today. The Plan makes continued reference to the importance of Wadebridge and its parishes developing their unique selling points (USPs) and marketing the area as a destination. The Town Plan also refers to building upon the location, facilities and heritage of the town, adapting a suitable marketing message, giving consideration to festivals and events while gaining support from tourism operatives, residents and town traders. The town still lacks a dedicated web site, so the current online offering of the area is fragmented and often out of date.

The Chamber's vision of the area's USP is to re-interpret the long-standing and economically successful characteristics of a vibrant market town by accentuating local supply chains and low carbon options. There is support for the idea of a local currency.

The Chamber recognises the potential benefits of superfast broadband – and has successfully negotiated special status for the Wadebridge area in achieving high fibre-to-premise ratios and a dedicated programme for developing the commercial opportunities that Superfast can offer. However, parts of Egloshayle and St Breock parishes endure poor broadband and 3 and 4G connections and it is difficult to envisage sufficient infrastructural investment to rectify the situation in the remoter parts of the neighbourhood area.

Internet Access Provision

Clearly there are so many ways that access to the internet helps businesses. For some, it might be a bit of icing on the cake; for others, it may well be the key to making their business viable. It is also

[32] Carshare Cornwall website, 2013

becoming obligatory in so many aspects of business, from making a VAT return or having finger-tip information on your bank balance, to marketing and sales.

At some level, any access to the internet, no matter how slow, helps. Submitting a quarterly VAT return at even old-fashioned 50 kbs dial-up speed can get the job done. However, as the Wadebridge Area is a relatively remote part of the UK, with less than adequate physical transport infrastructure, fast upload and download speeds could open up opportunities for us to export digital products, and engage in cross country, pan-European, even global interactions almost as though we were in the same room as our various partners.

Current Position

In a straw poll of local businesses (4 companies) carried out by the Wadebridge and District Chamber of Commerce all said they used ASDL connections, with one about to become triple-bonded ASDL as they can't wait for superfast to be installed on the Trenant business park. For those companies just running e-commerce websites, and even for more data-intensive activities like webinars and skyping, access speed does not seem to be an issue.

For some, though, the time it takes to transfer large media files is a real issue, and one newly-formed company, who is using Voice over IP to run a telephone-based sales operation, is possibly losing business as a result of only having ASDL bandwidth.

As the internet is such a strong competitor for local retailers, there are a number who are supplementing their income streams with online business, and who also might not survive without an online presence.

Superfast Broadband

The precise benefits of superfast will be a personal experience for each business. For some, current ASDL access via the existing telephone line is adequate for their needs. But we have been made aware by the Chamber of Commerce of at least one business that uses Voice over IP for a call centre supplying product around the country that are at capacity with existing provision and are desperate for more communications bandwidth.

The Superfast project itself lists the following key benefit areas:

- Cloud Computing
- Communication
- Collaboration
- Social Media
- Data Transfer
- Remote Data Storage
- Remote Access
- Flexible Working
- Improved Website Functionality

The key benefits are often cost and time saving. For example, Cloud Computing reduces the cost of an expensive, in-house IT infrastructure and support, and allows access from any connected device, so users can save on hardware costs and redundancy, and reduce the need to have your workforce all in one place.

For social media, a business may have collaborated with a remote partner in producing a marketing video, and are then uploading such large media much quicker, saving considerable time.

The Chamber of Commerce tells us that *"like many things, local businesses are wondering what the real benefits of superfast are, will go for it anyway, and then wonder how on earth they lived without it, just like the days before we had smart phones. For example, one business, who combines a high-street presence with a successful online shop, commented: Updating the website might improve but I'm not so hampered by speed here that it'll change my life adding an extra second, or two.*
But another, how provides web and digital services, said: We use a lot of cloud type services for data transfer, for which data transfer speeds are crucial. … Remote data storage is an interesting question, as we have tried online backup services in the past, but because of the volume of data to be backed up, it simply could not work on a standard broadband. Remote access to our servers here is something that I use a great deal via an FTP pinhole access, and of course that will be more efficient with higher speeds.
One of the four businesses questioned by the Chamber of Commerce might be described as 'curious' about superfast; for the other three, they do need faster upload and download speeds, as well as remote storage and cloud services. One was not happy with the progress from Superfast Cornwall, but needs to use cloud-hosted servers, so has chosen to move to the more expensive triple-bonded ASDL instead."[33]

Wadebridge Town Centre and Retailing

As summarised in a county-wide Retail Study of 2010, *"Wadebridge is considered to be a healthy and attractive town centre"*[34] and a popular focus for both the local population and tourists visiting the area. The centre has a good range of retail and service uses, with the convenience retail sector anchored by Co-op and Lidl stores and a proportion of comparison goods retailers (which are generally local independents), which is higher than national and Cornish average levels. Premises vacancies in the town centre have been low in recent years, indicating a fair level of demand for retail and commercial premises and a reasonable degree of investor confidence in the centre. Not to be forgotten too is the fact that Wadebridge Town Centre also remains a major employment hub for local people.

Wadebridge is distinctive for its large proportion of independently owned shops, restaurants and cafes. Excluding the supermarkets, the town has only four shops which are branches part of nationwide multiples – Boots and Betfred among them. At the beginning of November 2013 there were seven charity shops in the town centre.

In terms of its convenience goods shopping function, the town centre's Co-op does attract some main food shopping trips although the centre is likely to attract a higher than average number of 'top-up' visits, as the out of centre Tesco store at West Hill seems to attract the majority of 'main/bulk food shopping trips'.

Retail Composition of Wadebridge town centre, 2008-2009

	2008		2009		Cornwall	UK (2008)
Sector:	No.	%	No.	%	%	%
Convenience	15	10.64	14	10.69	10.10	9.53
Comparison	78	55.32	72	54.96	48.57	43.23
Service	44	31.21	40	30.53	31.59	33.97
Vacant	4	2.84	5	3.82	10.14	12.03
Miscellaneous	0	0	0	0	0.68	1.24
Total	141	100	131	100	100	100

Source: Experian

The town centre also benefits from the presence of the Camel Trail, a cycle route which links Wadebridge with both Padstow and Bodmin. The Trail's route through the centre of town allows tourists to stop off and visit/use its facilities. The route through the town centre does require cyclists to share

[33] Report by the Chair of Wadebridge and District Chamber of Commerce, Dec 2013
[34] Retail Study, GVA Grimley for Cornwall Council, 2010

the main highway with motor vehicles, which is an area where potential improvements could be made, as is the provision of additional bicycle parking facilities, which would make the town centre a more attractive stop-off destination for tourists.

The Wadebridge neighbourhood plan area currently hosts three supermarkets: a large Tesco is sited at the top of West Hill, within St Breock Parish. In spite of the objection of the Parish Council, Tesco was granted permission in 2011 to increase its floorspace by 900 square metres in order to develop a 'click and collect' service and expand retail floor space. The store also erects additional sales space in the summer, concentrating upon the provision of beach goods and leisurewear. Permission has been granted for Tesco to open a petrol station at the top of West Hill but, at present, no action has been taken.

There is a medium sized Co-operative supermarket in the middle of the town, offering customers parking refunds if they spend over £10 in the store. Most of the store is devoted to groceries. At the northern end of the town centre is a branch of Lidl. Like the Co-op, most shopping visits are for 'top up', rather than the main weekly shop.

In the face of widespread opposition planning permission was granted in 2011 to the development of a large Sainsbury store (2090 sq metres) on a site adjacent to the existing Council offices at Trenant. The supermarket's location presents an additional threat to the economy of the town centre, especially in the tourist season when visitors travelling in the direction of Rock, Polzeath and other settlements to the north of the River Camel will be able to stock up at Sainsbury and continue their journeys without any reference to the centre of Wadebridge. The consequence may be that, in terms of total retail spend, Sainsbury and Tesco will dominate the local retail spend, Co-op and Lidl included, and a hugely significant proportion of the area's retail profits leaves the county.

Cornwall Council commissioned an analysis of the impact of supermarket growth within the town and surrounding area. *'When considered alongside the Tesco extension, the cumulative impact of the Sainsbury store is between £2.8m and £4.1m to the Town Centre, equivalent to the loss of between 7.7% and 9.6% on Town Centre turnover levels.' (*Appendix 1 GVA report)

Other out of town stores with some retail element include: Jewson, Travis Perkins, Cornwall Farmers and Trelawny Garden Centre, which lies within Egloshayle parish. Other than Tesco, St Breock Parish only has a single retail unit – a country sports outlet in Burlawn.

Permission has been granted for the establishment of three medium sized retail units on the left of the service road leading to Tesco and the Dunveth Business Park. Again, this development was opposed by St Breock Parish Council but, as yet, no work has started on the development and is unlikely to before tenants for the units have been secured. The same developers have now applied for a further three retail units at the same site (see planning pipeline map).

The impact of out of town and internet shopping - and the economic downturn - is reflected in the current number of vacant retail premises in the town centre. At the time of the Employment Land review in 2009, the figure was four. In early November 2013, there were seven vacant units.

Community Survey 2012 and the Town Centre

The Neighbourhood Plan questionnaire in 2012 asked a series of questions of local people about the shopping experience in Wadebridge. We asked respondents about the main purpose of their visit to the town centre. Although shopping was the main reason cited, it was the primary purpose in less than 50% of visits.

The survey asked whether local people carry out "*most of their shopping*" in Wadebridge town centre. Of the 1,072 responses to this question, there was a very close split. 48.4% do most of their shopping in the town centre, 51.6% do not. Out of town retail shops are the main alternative destination, with significant numbers of shopping trips to Sainsbury and Asda in Bodmin.

Asked why Wadebridge town centre is not used as the main place for shopping, 38% cited poor parking, 29% poor variety of shops, 19% traffic issues and 14% felt that lack of facilities are an impediment to using the town centre. Prices, free parking, convenience and opening times also featured as reasons for using the out of town centre supermarkets, whether in Wadebridge or Bodmin.

The question of out of town retail developments showed an even split in opinion. Asked whether out of town centre retail locations should be encouraged, 52% of respondents answered 'yes'. Asked the same question about town centre retail encouragement, almost exactly the same number responded 'Yes'.

When asked about satisfaction with the transport and traffic arrangements when visiting Wadebridge, 58% reported dissatisfaction. They were then asked to rate the importance of a number of changes which might occur to improve visits to the town centre. Short stay parking spaces, the pedestrianisation of Molesworth Street and improved bus services and cycle routes were cited as the most important initiatives that might increase town centre footfall.

The business community was similarly quizzed about the town centre and its prospects during the autumn of 2013. The survey showed a degree of ambiguity about the future of the town centre amongst the 33 respondents.

Wadebridge Area Business Survey 2013			
	Yes	**No**	**D/K**
Should the current core retail area in Wadebridge be extended?	39%	42%	18%
Should there be further out of town retail development in the area?	26%	62%	12%

Wadebridge School's sixth form survey 2013 asked about the town centre and specifically about the need for additional food outlets/restaurants. There seems to be support for additional outlets in the town centre. The table below shows the response in order of 'popularity'. The results may be as relevant or more to the health and wellbeing agenda!

Wadebridge 6th Form Survey 2013		
New Food Facilities Wanted		
Subway		15
McDonalds		12
Costa		4
KFC		3
Nandos		3
Pizza Hut		3
Restaurants Italian / Chinese		3
Burger King		2
Pizza Express		2
Mexican		2
Bars		2
Various Fast food		2
Rick Steins		1
Bagel Nash		1
Frankie n Bennys		1
Sushi		1
Thai		1
Bistro		1

Employment Sites and Commercial Development

The Cornwall Local Plan 2010-30 offers the following guidelines for employment land:

> *"Development will be permitted where it can be demonstrated that the following priorities for Wadebridge can be satisfied:*
> *a) The protection of the vitality and viability of Wadebridge Town Centre through the promotion of retail, office and leisure uses. Proposals for change of use or redevelopment will only be permitted within the Primary Shopping Area if the proposal adds to the attractiveness of the centre and does not reduce the predominance of A1 retail use;*
> *b) The provision of around 4,000sqm of B1a office accommodation and 4,000sqm of Industrial space has been identified. This has the potential of accommodating 300 jobs in the Wadebridge area over the plan period;*
> *c) The provision of around 800 dwellings in the period up to 2030;*
> *d) Reduction of the need to travel through the creation of balanced communities and prioritisation of sustainable transport measures to reduce congestion.*

In the remainder of the Community Network Area (e.g. Egloshayle, St Breock) development will be permitted where it supports the following priorities:

> *a) Additional housing and employment growth should be of a size, nature and scale appropriate to the needs, character, role and services available of the settlement;*
> *b) Development should help rebalance the communities by providing facilities, economic development or housing for local needs of a scale that is appropriate to the settlement and reduces the need to travel;*

There appears to be a good supply of undeveloped sites within the Wadebridge area. In the short term, extensions to existing development at Higher Trenant, Dunveth and Trenant Industrial Estate are available and could potentially deliver around 11 hectares of office (3.75ha) or industrial (6.25ha) accommodation[35].

The Planning Pipeline

Summarised below the existing major commercial/business development sites in the neighbourhood area that are in the 'pipeline' that is the planning process:

> <u>Tesco's site at West Hill</u> - Planning consent granted for extension of existing store and petrol station across the road on land adjacent to Travelodge.
> <u>Dunveth Business Park</u> - Part developed with a variety of let commercial units. Site sold to Insect Lore but not developed. Triangular site on the left of the entrance from West Hill has planning consent for 3 commercial units with a current planning application to include the balance of undersold/undeveloped land for another 3 commercial units.
> <u>Land above and side of Cornwall Council Offices at Trenant</u> - (WAD 7 in North Cornwall District Council Local Plan.) Planning consent granted for the erection of a Sainsbury supermarket and petrol filling station. Small triangular piece of land formerly part of Bess Park House not part of the Sainsbury scheme. Planning consent for individual employment units turned down.
> <u>Land adjacent to Trevilling Road</u> – (WAD 8 in North Cornwall District Council Local Plan and allocated for Waterside Industrial Use.) Recent articles in local papers and artistic impressions of "Innovation Hub" proposed to be erected on Cornwall Council Land. If the Innovation Hub is built in this location it is likely the nearby light industrial units namely Daftens and MGC would require relocating. Residential developers are known to be interested in this land.

General observations on the current situation:

- If the football field is developed for residential use then the neighbourhood plan would have to find a completely new area for general employment use. Some, no doubt, could form part of

[35] Cornwall Employment Land Review, Nov 2010

the redevelopment of the land between Trevilling Road and the River Camel in conjunction with the Innovation hub if that goes ahead.

- The relocation of Cornwall Council's depot and Environment Agency as well as Daftens and MGC could be to old council offices at Trenant.
- It would be difficult to extend the Dunveth Business Park as the land behind is used for parking for the Royal Cornwall Show and the land to the side would be above the "Care Village" if that development goes ahead.

Future Needs and Trends

We have been guided by the members of the Chamber of Commerce that responded to the 2013 Business Survey. Whilst the response was only a small proportion of the total business community of the area, it does help us to understand what the business community feels about the area's prospects and what might help. The tables below provide us with some guidance as to what the local business community currently thinks:

Wadebridge Area Business Survey 2013	
Barriers to current land being developed:	
Financial climate	6
Lack of Funding/Investment	4
Too Expensive	3
Insufficient interested businesses	2

Wadebridge Area Business Survey 2013	
Main factors that would help business to expand:	
Business rate reduction	7
Growth of Wadebridge	3
Free parking	3
Tourism	2
No more food outlets	2
Infrastructure improvements	2

Wadebridge Area Business Survey 2013		
What kinds of employment should the plan encourage?	No.	%
Tourism leisure and crafts	29	18%
Shops-Retail	25	15%
light industrial	16	10%
Food and drink	15	9%
new media/IT	15	9%
transport storage and distribution	12	7%
community social services	12	7%
financial and professional services	11	7%
Renewable Energy Sector	11	7%
Social enterprise	10	6%
Pubs, restaurants	9	5%
totals	165	100%

Wadebridge Area Business Survey 2013		
Where should employment land be located in the future?		
	No.	%
Existing Employment Sites	27	44%
Other brownfield	23	37%
Greenfield sites in parish	5	8%
No need for additional employment land	5	8%
Other	2	3%

Wadebridge Area Business Survey 2013			
	Yes	No	D/K
Should existing employment sites be protected from change of use?	41%	38%	21%
Should the Plan Include policies that promote working from home?	50%	35%	15%
Should we have an Innovation Centre?	72%	13%	16%
Do you expect to recruit additional staff in the next two years?	34%	22%	44%

Wadebridge Area Business Survey 2013	
Suitable Site for Innovation Centre:	
Dunveth Business Park	5
Trenant	3
Bradford Quay	3
Any Existing Site	2
Bodieve Road	1
next to Jewson	1
Polmorla Road	1
Near town centre	1

Wadebridge Area Business Survey 2013	
What would encourage business to locate in Wadebridge area?	**No.**
Cheaper/Concessionary Business Rates	12
Better Communications/Infrastructure	8
Better/Free Parking	8
Location	4
Incentives	3
Independence of town businesses	3
Cheaper Rent	2
Highly motivated and adaptable potential workforce	2

Wadebridge Area Business Survey 2013	
Barrier to moving into or expanding in Wadebridge area	**No.**
Communications	10
Location	5
Parking	5
General Costs	4
Lack of Affordable/Suitable Premises	4
National Economic Climate	4
Business Rates	3
Bank Lending/Finance	2
Infrastructure	2
Old/Inadequate Industrial Estates	2

Summary Conclusions

Clear facts (*from the Evidence*):

- Our brightest young people are leaving the county for studies and careers
- There is a high level of economic inactivity amongst the local population
- Recent growth in employment has been predominantly in low paid / low value sectors
- The gap between average earnings and average house prices is significant and a barrier to local people affording the home they desire
- There is substantial support for Innovation Hub

Main problems/issues (*from the Evidence*):

- Economic inactivity – represent an untapped potential in local workforce
- Lack of high value employment in Plan area
- Lack of employment opportunities for young people
- Mediocre broadband service
- Potential lack of suitable employment land and premises

Trends - What has changed significantly over the past 10 years?

- Changes to proportions of employees in low paid sectors
- Fragmentation of employment market and falling/stagnating earnings
- Proportion of employment more likely to be filled by women
- Changes in the Town's retail offering
- Opportunities in the renewable energy sector
- Establishment of Tesco as monopolistic retail offering

What is most needed?

- Business Innovation Centre
- Innovative approach to Town Centre parking
- Better communications for businesses / encouragement to home working
- Less arduous business rates

What messages have local people sent?

- 50/50 spilt of opinion on further out of town retail development
- Importance of maintaining Town Centre vitality and the distinctive character of the town
- Support for Innovation Business Hub

What are the obvious 'development' opportunities?

- Innovation Hub for new businesses and higher value employment
- Exploration of ways in which the river can be commercially exploited for residents + visitors
- Community right to build (more an issue for Housing) but important under affordability in LE
- Exploration of ways to find alternative supply chains for local products

What is the most interesting finding?

- Growth since the turn of the Millennium has been confined to low value sectors

Key Neighbourhood Planning Questions Going Forward:

- To what kind of local economy should we aspire and how can it be made more sustainable?
- Should Wadebridge be viewed and treated as part of a wider employment market centred on Bodmin?
- How can we help ensure that there is a continued supply of local jobs that will meet local employment needs and help increase prosperity?
- How can we ensure we have the right mix of land and buildings available to facilitate growth?
- To what extent do we need to meet the aspirations of young people?
- How can we best help the farming community?
- What mix of uses and functions is most likely to lead to a viable town centre?
- To what extent does the low carbon sector offer an avenue for sustainable economic growth?
- How can we harness the area's tourism potential to increase its contribution to sustainable economic growth?

What must we try to find more about?

- Views and aspirations of the business community
- The economic strategy and development plans in adjoining areas
- Potential of the Smart Cornwall programme and the Wadebridge Innovation hub to stimulate new forms of local economic growth
- The relevance of an Economic Strategy for the Wadebridge area to accompany the Neighbourhood Plan