

Economy

There is limited data available on economic activity at a parish level.

This section draws on a number of sources to provide some insight into the economic activity and employment within the Parish. It is mainly derived from the analysis of the employment and economic activity data provided by residents in the 2011 Census and some data on the enterprises with premises in the Parish that are liable for business rates.

Economic Activity

Table E1 that follows illustrates the levels and type of economic activity of residents of the Parish.

Table E1 : Economic activity of residents of St Hilary Parish

	St Hilary Number	St Hilary %	Cornwall %	England %
All usual residents aged 16 to 74	611			
Economically active	427	70	67	70
In employment	395	65	61	62
Full time	162	27	32	39
Part time	108	18	15	14
Self employed	125	21	14	10
Unemployed	15	2	3	4
Full time student	17	3	3	3
Economically inactive	184	30	33	30
Retired	111	18	19	14
Student	29	5	4	6
Looking after home/family	22	4	4	4
Long term sick	15	2	4	4
Other	7	1	2	2

Source: Census of Population, 2011

The data in the table indicates:

- Economically active rate to be around 70% - higher than in Cornwall, same as in England
- Some 65% of working age residents are in employment – higher than in Cornwall and England
- 21% of residents aged 16-74 are self-employed – higher than in Cornwall, twice as high as in England
- 18% of working age residents are retired – slightly below in Cornwall, but more than in England

Patterns of economic activity in the Parish are somewhat different from those across Cornwall and in England as a whole in key areas of type of employment:

- **Self-employment:** level is relatively high (21%) in the Parish being seven percentage points higher than the average for Cornwall as a whole (14%) and twice as high as average for England
- **Employed sector:** level of full-time employment is relatively low in the Parish being five percentage points lower than Cornwall average and twelve percentage points lower than average in England as a somewhat greater proportion of the employed in the Parish are part time.

Occupations

Table E2 that follows shows the distribution of occupation for those residents of the Parish that are in employment.

Table E2: Occupational structure of Residents Age 16 to 74 in employment in St Hilary Parish

	St Hilary No.	St Hilary %	Cornwall %	England %
All residents 16-74 in employment	413			
Managerial/director	49	12	11	11
Professional/scientific	74	18	14	17
Associate professional/technical	37	9	10	13
Administrative/secretarial	43	10	10	11
Skilled trades	85	21	17	11
Catering and leisure	42	10	11	9
Sales and customer services	16	4	8	8
Process/plant operatives	20	5	7	7
Elementary	47	11	12	11

Source: Census of Population, 2011

The occupational structure of the Parish is broadly similar to that of Cornwall as a whole but with a few key exceptions:

- **Professional/scientific occupations:** employment in professional/scientific occupations is four percentage points higher in the Parish than across Cornwall as a whole (14%)
- **Skilled trades:** employment in skilled trades is four percentage points higher than across Cornwall (17%) and double the average for England
- **Sales and customer services:** conversely employment in sales and customer services is four percentage points lower than both Cornwall as a whole and the average for England

The industry sectors worked in by residents of the Parish is shown in the following table (Table E3).

Table E3: Industrial sector worked in by residents of St Hilary Parish

	St Hilary No.	St Hilary %	Cornwall %	England %
All categories: Industry	413			
A, B, D, E Agriculture, energy and water	38	9%	5%	2%
C Manufacturing	14	3%	8%	9%
F Construction	48	12%	9%	8%
G, I Distribution, hotels and restaurants	92	22%	26%	21%
H, J Transport and communication	28	7%	5%	9%
K, L, M, N Financial, Real Estate, Professional and Administrative	54	13%	12%	17%
O, P, Q Public administration, education and health	116	28%	30%	28%
R, S, T, U Other	23	6%	5%	5%

Source: Census of Population, 2011

The industrial sectors are broadly similar to Cornwall but with some exceptions:

A significantly higher percentage are working in Agriculture, energy and water sectors and construction than across Cornwall and England and a lower percentage are working in Manufacturing and in Distribution, hotels and restaurants than across Cornwall.

The public sector - administration, education and health - is the largest employer of the working population of St Hilary employing 28% of residents which in line with country as a whole, followed by the wholesale and retail distribution, hotels and restaurants sector that employs 22% of workers. These two sectors account for 50% of residents of St Hilary which is in line with average for England but is some six percent points lower than average in Cornwall which is above the average for England.

Finance, real estate, professional and administration employ 13% of St Hilary residents in line with Cornwall but lower than across England and a further 12% are employed in construction which is more than across Cornwall and England.

The more detailed breakdown of employment by industry is shown below in Table E4.

Table E4: Industries worked in by residents of St Hilary Parish

	St Hilary No.	St Hilary %	Cornwall %	England %
All categories: Industry	410			
A Agriculture, forestry and fishing	26	6.3%	3.0%	0.8%
B Mining and quarrying	2	0.5%	0.7%	0.2%
D Electricity, gas, steam and air conditioning	3	0.7%	0.4%	0.6%
E Water supply, sewerage, waste management	7	1.7%	0.8%	0.7%
C Manufacturing	14	3.4%	7.9%	8.8%
F Construction	46	11.2%	9.0%	7.7%
G Wholesale and retail trade; incl vehicle repairs	51	12.4%	16.8%	15.9%
I Accommodation and food service activities	40	9.8%	9.2%	5.6%
H Transport and storage	16	3.9%	3.7%	5.0%
J Information and communication	12	2.9%	1.7%	4.1%
K Financial and insurance activities	7	1.7%	1.5%	4.4%
L Real estate activities	6	1.5%	1.4%	1.5%
M Professional, scientific and technical activities	23	5.6%	4.7%	6.7%
N Administrative and support service activities	18	4.4%	4.3%	4.9%
O Public admin. and defence; compulsory social security	13	3.2%	6.3%	5.9%
P Education	53	12.9%	9.7%	9.9%
Q Human health and social work activities	50	12.2%	13.5%	12.4%
R,S Arts, entertainment and recreation; other services	23	5.6%	5.2%	4.8%
T, U Other	0	0.0%	0.1%	0.2%

Source: Census of Population, 2011

The data illustrates that:

- The greatest proportion of local residents (12.9%) work in education, closely followed by the wholesale and retail and health and social care sectors (12.4% and 12.2% respectively), construction (11.2%) and the accommodation and food service sector (9.8%). These five sectors account for almost 60% of employment for St Hilary workers.
- Although agriculture, forestry and fishing account for only just over 6% of employment this is still double that across Cornwall as a whole.

The Census data reflects the change there has been in employment in rural communities like St Hilary away from the traditional industries of agriculture, fishing and mining to public and private service sectors.

The industrial structure of the Parish broadly reflects that of Cornwall as a whole, but with a few key exceptions:

- **Agriculture, forestry and fishing:** employment in this sector is 3.3% higher than across Cornwall as a whole.
- **Education:** employment in this sector is 3.2% higher than across Cornwall
- **Wholesale and retail:** employment is 4.4% lower than across Cornwall
- **Manufacturing:** manufacturing employment is 4.5% lower than across Cornwall as a whole.

At the time of the 2011 Census the number of economically active residents in St Hilary was 427 which is 70% of the working age population aged 16-74, (See Table E1) of which 395 were in employment with 15 unemployed and 17 full-time students. Table E5 shows the numbers in employment by industry sector with breakdown by type of economic activity. Overall, almost 70% are employees with 40% full-time employees and 29% part-time and 31% in self-employment.

Table E5 Industry by economic activity – St Hilary Working Population

Industry	All categories: In employment No.	Employees Full-time %	Employees Part-time %	Self- employed %
All categories: Industry	413	40%	29%	31%
A, B, D, E Agriculture, energy and water	38	37%	16%	47%
C Manufacturing	14	64%	7%	29%
F Construction	48	27%	13%	60%
G, I Distribution, hotels and restaurants	92	42%	37%	21%
H, J Transport and communication	28	39%	32%	29%
K, L, M, N Financial, Real Estate, Professional and Admin.	54	31%	28%	41%
O, P, Q Public admin., education and health	116	51%	38%	11%
R, S, T, U Other	23	22%	22%	57%

Self-employment is the main activity for those workers in the construction and arts and recreation (R&S) with 60% and 57% respectively.

Self-employment is also high in Agriculture, energy and water industries (47%) and finance, real estate, professional and admin (41%).

In the public admin, education and health industries 89% of workers are employees.

Manufacturing has the highest level of full-time employees at 64%. Distribution and hospitality have a high level of employment at almost 79% split fairly evenly between full and part-time. In transport and communications, the majority of workers are employees (71%).

Industrial Structure in the St Hilary Parish

There is little reliable data available as to the number and types of businesses in the parish, the nature and types of employment opportunities that these provide or the broader industrial structure of the parish.

The parish does not have any major industrial or commercial centres such as business or retail parks. The register of businesses registered for business rates provides some information on the businesses in the parish. Not all businesses such as farming enterprises are liable to business rates so this only provides a partial picture of the different business sectors within the Parish.

Table E6 below shows the percentage breakdown of the cumulative rateable values by type of activity for businesses located within the Parish.

Table E6

St Hilary - businesses premises to business rates

Rateable
Value

Tourist accommodation - self-catering holiday units	32%
Tourist accommodation - caravan and camping sites	26%
Educational establishments - primary school and nursery premises	14%
Community clubs and premises - Rosudgeon Social club, Playing Field and Institute	11%
Equine and animal services - livery, stables and kennel premises	11%
Retail and hospitality services - public house and retail premises	4%
Factory and storage facilities	3%

In terms of the land coverage, it is evident that only a small proportion of the land in the parish is built on. There is no specific data available on land usage in the parish but with only a low density of housing, small number of roads and few industrial buildings the majority of the land is not built on.

The Ministry of Housing, Communities and Local Government estimates of land usage indicate that 6.2% of land in Cornwall is “Developed” with 93.5 % classified as “Non-developed Land” (see Table E6). The land usage classified as non-developed is for Agriculture, Forest, open land , water, outdoor recreation, undeveloped and residential gardens. The land usage for housing (the building) is classified under Developed Land. It may be more meaningful if housing and residential gardens are looked at together as this is how residential dwellings are viewed by the general public. If housing and gardens are taken together then developed land usage in Cornwall would 9.3% and non-developed 90.7%. On same basis the figures for England as whole would be 13% and 86% respectively.

Table E7 Land Usage Statistics

Land Use Statistics Cornwall & England 2017	Cornwall		England
Developed Land	6.2%		8.2%
Non-developed Land			
Agriculture	68.7%		63.1%
Forest, open land and water	20.8%		20.9%
Outdoor recreation	0.9%		2.1%
Residential garden	3.1%		4.8%
Undeveloped land	<u>0.3%</u>	-	<u>0.8%</u>
	99.9%		99.8%
Source : Ministry of Housing, Communities and Local Government June 2019			

The area of the parish is some 1,186 hectares. Based upon the land usage for Cornwall the land used in St Hilary in hectares would be:

Estimated Land Use in St Hilary	Hectares
Developed Land including for houses, gardens, buildings, roads, etc	110
Non-developed	
Agriculture	815
Forest, open land and water	247
Outdoor recreation	11
Undeveloped land	<u>4</u>
	1,185

A different approach to measuring land coverage was developed in 2012 using high resolution satellite imagery and is available for Cornwall from the England Corine Land Cover data 2012. The Corine Land Cover (CLC) data, created through interpretation of high resolution satellite imagery, is based on satellite data from 2011-2012 and is accurate to about 25 metres and therefore provides a good general overview of land usage and coverage. The CLC classification has three different levels and the most detailed has 44 different land use classes while at the most basic, land cover is classified into one of five types – ‘agricultural areas’, ‘artificial surfaces’, ‘forest and semi-natural areas’, ‘water bodies’ and ‘wetlands’.

Table E8 Cornwall Corine Land Cover – basic classification

Artificial surfaces	6.18%
Agricultural areas	81.40%
Forests and semi-natural areas	11.84%
Wetlands	0.32%
Water bodies	0.20%

There is good correlation between Developed Land and Artificial surfaces but less so in regard to division between agricultural and other open land with a roughly 10% difference between these two approaches to classification.

The Corine detailed classification does provide a breakdown of the agricultural areas into Non-irrigated arable land (48%) and Pastures (33%).

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Whatever classification is more closely representative of St Hilary it is clear that agriculture will be the main land usage in St Hilary Parish and is thereby very likely to represent the largest business sector in the parish.

The average total income from farming (TIFF) according to the latest data available from the Defra – first estimates for 2019 – indicate that the TIFF per hectare for Cornwall is => £1,000. This is the highest band of TIFF per ha in England where the average is £438/ha and average for South West region is £360/ha. Farming enterprises in Cornwall have amongst the highest TIFF per hectare in England.

As a rough estimate the TIFF for the farming enterprises in the parish could be 814 hectares at £1,000 per hectare = £814,000.

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/892845/agriaccounts_tif_fregstatsnotice-18jun20.pdf

The value of the agricultural land in the parish could be of the order of 814 ha at £17,000 per hectare = £14 million.

<https://content.knightfrank.com/research/157/documents/en/english-farmland-index-q4-2020-7742.pdf>

Rateable value is the value assigned to non-domestic premises by the Valuation Office Agency (VOA) and is based on a property's annual open market rent, size and usage. These are reviewed periodically but decisions are also based the VOA's perception of market rents appropriate for such ventures and can be far higher than the amount actually achieved if the venture was let to a third party to operate.

According to the latest available data on farm rentals published by Defra the rental per hectare for the two main types of farm rental tenancies for the South West region in 2019 was around £220/ha.

See: <https://www.gov.uk/government/statistics/farm-rents>

With 814 ha of agricultural land in the parish this would indicate the farmland in the parish would have a “rentable value” of around about £180,000 pa. That would be equivalent to about 45% of the combined rateable value of the other businesses in the parish listed in table E6.

These are only approximations of the value of agriculture in the parish. However, they may be indicative of the contribution of the agricultural sector to the economy of the Parish.

Travelling to work and working mainly from home

The distances travelled to work by residents of the parish reported in the 2011 Census are shown in Table E99 by industrial sector of employment.

Table E9 Distance Travelled to Work by Industry

	All Working	Less than 10km	10km to 30km	30km and over	Work mainly at or from home	Other distance not specified
All categories: Industry	413	130	96	26	107	54
A, B, D, E Agriculture, energy and water	38	8	7	2	16	5
C Manufacturing	14	4	2	0	4	4
F Construction	48	10	4	0	11	23
G, I Distribution, hotels and restaurants	92	32	22	6	30	2
H, J Transport and communication	28	7	4	2	11	4
K, L, M, N Financial, Real Estate, Professional and Admin.	54	17	8	8	12	9
O, P, Q Public administration, education and health	116	48	49	7	9	3
R, S, T, U Other	23	4	0	1	14	4

Some 26% of the working population say they work mainly at or from home, 13% couldn't specify the distance, 31% travel less than 10km, 23% travel 10 to 30km and 6% travel more than 30km to work.

The Arts and recreation sectors (R&S) have the highest percentage of working at or mainly from home (61%) followed by agriculture, energy and water sector (42%) and then Transport and communications sector (39%).

Only 8% of public administration, education and health sector workers work from or at home. In the other sectors between 22% and 33% of workers work mainly at or from home which is very much around the average for working population.

Construction has the highest percentage of workers (48%) unable to specify how far they travel to work which is not surprising given the nature of the industry. Of the workers in distribution and hospitality sectors, and public administration, education and health sectors 97-98% can specify how far they travel to work which indicates that these workers are likely to have a regular place of work. Public administration, education and health sector workers account for 51% of those travelling between 10 and 30 km to a workplace.

We do not have any further breakdown on distances travelled by industry but the data for all industries shown in Table 10 below indicates that most workers from St Hilary travel between 5 to 10 km (23%) or 10 to 20 km (17%) together accounting for 40%. This is higher than for Cornwall (29%) and England (32%).

Only 9% of St Hilary workers who travel to work say they travel less than 5km which would equate to those working either in the parish or a neighbouring parish. This is much lower than the average of 35% for England and 31% for Cornwall.

Just over 23% of St Hilary workers who travel say they travel more than 5 km but less than 10km which would probably mean working outside of the neighbouring parishes but mainly within the West Penwith Community Network Area. Of the St Hilary workers 30% say they travel more than 10km, which would indicate that they probably work outside the West Penwith Community Network Area. Of the workers who travel to work 13% couldn't specify how far they travel which is high compared with Cornwall and national average.

St Hilary has a relatively high level of workers who say they work mainly at or from home (25%) which compares with only 10% in England and 16% across Cornwall as a whole.

Table E10 Breakdown of distance travelled to work for all industries

Distance travelled to work	St Hilary	In distance bands %	All Distances %	Cornwall %	England %
All categories: incl. travelling and working from home	410				
Less than 2km	15	12%	4%	19%	17%
2km to less than 5km	19	15%	5%	12%	18%
5km to less than 10km	96	74%	23%	13%	17%
10km to less than 20km	68	71%	17%	16%	15%
20km to less than 30km	28	29%	7%	6%	6%
30km to less than 40km	12	46%	3%	2%	3%
40km to less than 60km	8	31%	2%	2%	2%
60km and over	6	23%	1%	4%	3%
Work mainly at or from home	104		25%	16%	10%
Other	54		13%	10%	8%

Walking or cycling could be a practical option for travelling to work for the 9% travelling up to 5km.

Public transport could be an option for travelling up to 10km given the availability of services, albeit limited to some destinations within the West Penwith CNA. However, given the very limited destinations available on the public transport services through the parish (see evidence on transport) there will also be a necessity for many of the workers in the parish to use private vehicles. For travelling to work beyond 10km the use of private vehicles would appear to be the only practical option. Although a combination of public transport modes of bus and train could be an option only 2% of workers travelling to work say they use public transport.

The number of residents working in or within walking distance of the parish is around 140 (34%). This compares with 47% in Cornwall and 45% in England. However, this is due to high numbers of workers already working mainly at or from home (25%). There are few workers in the parish whose workplace other than home is in or close to the parish unlike elsewhere in Cornwall and England as a whole where around 1/3 of workplaces are within 5 km of worker's homes.

St Hilary Parish already has a high percentage of its working population working mainly at or from home with a further significant increase in level more difficult to achieve.

Other than working from home the opportunities for residents of St Hilary to work in or close to the parish are very limited with only 4% of resident who travel to a workplace travelling less than 2km i.e., within the parish and 5% traveling between 2 and 5 km which could be either in the parish or in a neighbouring parish. This compares poorly with elsewhere in the country and in the county where around about 33% travel less than 5km to a workplace. There would appear to be a case for more opportunities for employment in this and neighbouring parishes so that residents of St Hilary parish could have more opportunities for employment within walking or cycling distance of home.

Tourism Industry in St Hilary

There is a significant amount of accommodation for tourists available in the parish.

Basic desktop research undertaken in February 2020 just prior to the Covid pandemic found 40 properties in the parish being advertised as self-catering accommodation on estate agents' websites and other online platforms.

The tourist industry in Cornwall was adversely affected in 2020 due to the Covid 19 lockdown restrictions. Travel restrictions in the early part of the year affected the spring and early summer trade but there was some recovery later in the summer as concerns about overseas travel led to many holiday makers who would usually travel abroad instead opting for a "staycation" which helped the tourist industry recover somewhat from the dire early season trading situation.

There are currently 13,255 (2021) second homes recorded within the council tax database and 11,081 holiday lets registered for business rates which represent 4.6% and 3.9% respectively of Cornwall's housing stock and together amount to 24,336 houses - 8.5% of the houses in Cornwall.

Source: [Cornwall Council Meeting 2021 Sep 08 Minutes Item CC/50](#)

Of those registered for business rates 8,953 (80%) receive small business rates relief (SBRR) and of these 8,869 pay no business rates. The current cost of Small Business Rate Relief is £17,886,098.52 (average of £1,998). Whilst administered by Cornwall Council SBRR is met by central government in full. Of the 40 holiday lets in St Hilary at the beginning of 2020 some 38% were on the small business rate register which is significantly lower than the average for Cornwall.

During the COVID-19 lockdowns 7,414 holiday lets receiving SBRR received one or more government grants issued through Cornwall Council as compensation for loss of lettings due to the lockdowns. The total paid to these businesses was £169.7 million (an average of £22,890). Of the government grants awarded to holiday lets in Cornwall who received SBRR 61.8% (£104.8 million) went to owners who lived outside of Cornwall.

In 2021 with restrictions still in place on international travel many holiday makers again opted for a "staycation" and this resulted in a massive summer surge in visitor numbers to Cornwall with an extra 30,000 (17% up) people visiting Cornwall compared to previous years, according to tourism leaders. Anecdotally there were reports of tourist accommodation in and around the area being fully booked for the summer which provided the opportunity for expansion in the supply of accommodation for tourists in the sectors that could respond quickly to demand such as camping and through Airbnb and other on line platforms.

There is no specific information available on whether any such extra accommodation might have become available in the parish. However there have been stories in the media of some long term rented accommodation being switched to holiday letting during the surge in demand for accommodation in the tourist hot spots in 2021. The government also introduced temporary relaxation in the planning regulations for landowners allowing pop up camp sites in a move intended to help rural communities recoup income lost due to the Covid Pandemic and in the hope that this would prevent fly-camping. There was a strong growth in interest in camping with a 40% increase reported in sales of camping equipment compared with before the Covid pandemic.

Source: <https://www.davidhallpublishing.com/digital/camping-trade-world/ctw004/#page=24>

Besides the holiday lets the bulk of the tourist accommodation in the parish is provided in the form of caravan and camping accommodation. There are four main sites providing such accommodation in the parish. These are River Valley Country Park, Relubbus, Marazion Caravan and Motorhome Club site, Chynoweth Lane, St Hilary, Wayfarers Caravan Park, Relubbus Lane, St Hilary and Porth an Alys camping site, Prussia Cove (see map below).

The capacity of the caravan and camping sites in St Hilary parish :

River Valley Country Park – 168 static caravans; 80 tourist pitches	248 pitches
Marazion Caravan Park and Motorhome Club – 60 pitches	60 pitches
Wayfarers Caravan Park 3 lodges , 60 pitches with 32 pitches in use	35 pitches
Porth an Alys 20 camping pitches	<u>20 pitches</u>
Total	363 pitches
Total accommodation of holiday lets, and caravan and camping pitches	403 lets and pitches

This is comparable with the total number of properties in the parish (around 390 in 2021) and exceeds the number of residential properties of an estimated 340 in 2021.

This might indicate there could be a total of around 1,600 to 1,700 people, residents and visitors, staying in the parish during the summer season – double the usually resident population (latest ONS Population estimate 870 in 2020).

