


# The State of Cornwall: What we currently know about our Socio-Economic Landscape

An Studh a Gernow : Pyth Yw  
Aswonny's Lemmyn Adro Dh'Agan  
Tirwedh Socio-Erbysek

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Fondyans Studhyansow  
Kernewek –  
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# Introduction – Kommendyans

The Social and Economic Research Unit of the Institute of Cornish Studies (SERU) was launched in March 2022. In setting up this new unit, we are helping to fulfil the founding aim of our first director Charles Thomas to 'study of all aspects of... (our) past present and future'. Our emphasis in SERU is on our present and future.

We know that beyond Cornwall's scenery and visitor attractions, we have considerable poverty and inequality. Equally we have massive social and economic potential, cultural possibilities and environmental activism. We have a large and thriving third and voluntary sector and massive human potential. However, despite some noteworthy research projects our knowledge of the 'State of Cornwall' is partial and fractured. SERU was set up to try to address this knowledge gap through social and economic research.

Our founding aims are:

- To facilitate and conduct high quality social and economic research in Cornwall
- To build a network of partners in local government, education and the third sector
- To build an independent and autonomous research culture in Cornish organisations
- To develop a programme of high quality social research methods training for partner organisations.

The 'State of Cornwall' project is our first step. Our intention is to scope the overall picture in Cornwall, from the perspective of organisations working within it. What do they see as the main problems we face and what might be a way forward? Where should our research priorities lie? Our initial project is not definitive and will certainly be ongoing, but it has been an opportunity to listen to many voices, across Cornwall, and begin our engagement with the Cornish community to help us develop an effective social and economic research base. In some respects, this is a story about the narratives which we are telling about ourselves.

This report shares what we know to date about Cornwall, and covers the themes of Culture and Heritage; Work and the Local Economy; Housing and Homelessness; Fairness and Strong Communities; and Our Environment. We see that whilst we have a broad understanding about what the issues are that Cornwall faces, we lack detail about how these issues are affecting people's everyday lives and what this means for the future.



# Culture and Heritage – Gonisogeth hag Ertach

Cornish culture is thriving and is visible through heritage, language, food, community involvement, and strong attachment to place.<sup>1</sup> The campaign for Objective One funding from the European Union was a key moment in galvanising a sense of pride in culture and heritage, across civil society.<sup>2</sup> Heritage activities recall the dominance of tin and copper mining, and the historic Cornish diaspora which link us to many other parts of the world.<sup>3</sup> There is a deep inter-relationship between our culture and heritage and our historic economic activities. The fishing industry has been referred to as the 'lifeblood' and 'cultural fabric' of Cornwall, and with 36 active ports is very much still part of our contemporary landscape.<sup>4</sup>



In recent years our Cornish language has become used in official signage, street signs and in organisations' literature. Cornwall Council and Transport for Cornwall have been particularly active in this regard, the former using bilingual signage on its buses and the latter producing bilingual, or partially bilingual documents.<sup>5</sup> Although Cornish is unlikely to become a major community language in the foreseeable future, its potential as a marker of community identity and indeed a unique selling point in tourism promotion is likely to become increasingly important.<sup>6</sup>

Although some parts of Cornwall are able to use this heritage to boost the local economy and employment, there is much more scope for telling a fuller version of 'who we are' to both local people and visitors, many of whom are invited to 'discover their own Cornwall' rather than learn about our culture and heritage. Yet in fishing communities there is a tension between a desire to preserve aspects of our fishing heritage, and the contemporary industry as fishers can find themselves priced out of coastal communities.<sup>7</sup> This is also an issue for the wider maritime industry, who can struggle to recruit due to the costs of living nearby, and a lack of transport to sometimes remote businesses.<sup>8</sup> This compromises the ways in which contemporary culture is able to grow and develop, in sustainable, living communities.<sup>9</sup>

It is important to note that there are also parts of our economic heritage that are overlooked in these stories, such as our farming and even other forms of mining, such as China Clay, still dominant in mid-Cornwall. Indeed, in 'Clay Country' we have an organic connection between traditional economic activity, divisions of labour and culture.<sup>10</sup>

# Work and Local Economy – Ober ha Erbysiedh Leel

According to Meyrick, Cornwall is the fourth least productive region in the UK with regards to produced value per person. The people of Cornwall are not employed in sectors deemed 'high value, high-salary professions' such as jobs in technology, finance or science related but are more likely to be employed in hospitality, health and social care.<sup>11</sup> Our hospitality and tourism industry is still highly seasonal, exposing the fundamental problems with a 'gig' economy often leaving employees overworked.<sup>12</sup> The visitor industry dominates how Cornwall is perceived, and consequently is often imagined as its economic backbone.<sup>13</sup> Poorly verified statistics are common, such as that 1 in 5 jobs are reliant on the visitor industry.<sup>14</sup> Though conducted some years ago, a study by researchers at Exeter University of the Looe area, found that a large proportion of tourist enterprises employed only family members and these families were themselves migrants to Cornwall, thus providing little added employment value.<sup>15</sup> An emphasis on the visitor economy risks overlooking other sectors, such as construction, the creative economy, digital tech, maritime, and aerospace.<sup>16</sup> Where opportunities arise, such as with Lithium mining, we are not having critical conversations about what we can do to ensure that the benefits will be shared amongst the people of Cornwall.<sup>17</sup>

Low wages are also a serious issue. A full time worker in Cornwall and Isles of Scilly earns 89% of the regional average and 84% of the national average weekly salary.<sup>18</sup> This, combined with the high cost of housing (see below), means that living in Cornwall is a vicious circle of survival. In Camborne, the food bank provides 23,000 meals each week, to over 540 families.<sup>19</sup> DISC Newquay were providing 60 meals Monday-Friday, but now this figure has risen to 3-4000.<sup>20</sup> Many fear that Cornwall will not receive what it needs from the Shared Prosperity Fund (replacing European Union Structural Funds),<sup>21</sup> but Willett et al argue that part of the reason why the majority of the population in Cornwall voted to Leave the European Union was because they felt that Structural Funds had not helped them.<sup>22</sup> The authors argue that future funding needs to pay attention to what local people feel to be their challenges and barriers.

Cornwall Council are looking to aerospace and the 'Green and Blue Economy' (the environment and maritime sector) for our economic future and there is considerable potential around renewable energy.<sup>23</sup> The concept of 'Doughnut Economics' has gained traction as a means of 'unify(ing) stakeholders around a holistic vision of sustainable development', identifying all groups affected by decisions, in order to better understand societal and environmental impacts.<sup>24</sup> This requires greater data collection in topics such as rurality and different community perspectives to accurately assess our issues, and until then, it is difficult to consider all different groups effected by socioeconomic factors.<sup>25</sup> Worryingly, some people believe that 'seasonality' is a lifestyle choice rather than a necessity.

What we see from this, is that we lack a detailed understanding about the different economic sectors that we have in Cornwall, what their skills needs are in the short, medium and long term, and what are their barriers to growth and productivity.





# Housing and Homelessness – Annedhyans ha Dianedhder

This problem is not unique to Cornwall, but is particularly acute here,<sup>26</sup> and has a serious negative impact on health and wellbeing.<sup>27</sup> Second home ownership and holiday lets have become a particularly contentious issue.<sup>28</sup> In a study conducted in North Cornwall in 2015, Dykes and Walmsley found that the second home owners interviewed believed that they contributed to Cornwall socially and economically, bringing employment and business opportunities although were also willing to concede that they had an impact on local access to housing.<sup>29</sup> This finding is interesting as some people think that if second home owners understood the impact that they have on local housing, they might make different choices.<sup>30</sup> As of March 2022, approximately 29,000 homes are not lived in all year round.<sup>31</sup> The situation has become particularly acute given the UK-wide cost of living crisis and pandemic staycations.<sup>32</sup> Currently the average house price is 9 times the average salary, with less homes available to let than any other region in the UK, and with 11,000 people on the waiting list.<sup>33</sup>

Central government measures include higher stamp duty and stricter tax regulations on purchasers, but these do not ameliorate the immediate crisis.<sup>34</sup> The competition for Cornish properties has caused some to view the Cornish as an 'endangered species'. As Cath Navin the co-founder of a protest group called 'First Not Second Homes' stated 'this is not the platinum edge of the UK, this is people's homes and communities'.<sup>35</sup> Many people in previously secure tenancies have found themselves evicted, as landlords switch to the holiday market.<sup>36</sup> There can be as many as 75-100 queries per new rental once advertised, with the desperate offering to rent homes unseen and/or offering more than the advertised rental price.<sup>37</sup> It was reported in July 2021 there were over 1,000 properties available to rent on the popular holiday letting site Airbnb, yet on one of the leading UK estate agent sites, Rightmove, there was solely one property available for long term rent.<sup>38</sup> In an effort to ameliorate the crisis, in May 2022 Cornwall Council purchased land that was previously a holiday park, in order to provide 20 households with accommodation preventing them from sleeping on the streets, yet hundreds of families remain waiting in emergency accommodation until somehow the government can provide them with security.<sup>39</sup>

One of the gaps that we urgently need to understand, is what the housing crisis means for the 'real' cost of living, and an understanding of the impact of housing insecurity on local inhabitants.





# Fairness and Strong Communities – Ewnder ha Kemenethow Krev

Cornwall experiences an inadequate public transport network<sup>40</sup> and strained wider infrastructure, which is particularly acute in times of high visitor numbers.<sup>41</sup> Despite proximity to the coast, some local people have never been to the beach,<sup>42</sup> and 17 neighbourhoods are in the top 10 most deprived parts of the UK,<sup>43</sup> illustrating how behind claims to a high quality of life in Cornwall, many are struggling or experiencing real hardship. Austerity and reforms to Universal Credit have increased the precarity of already vulnerable local people.<sup>44</sup> Some issues relate to how policy designed for cities and urban areas is not appropriate for Cornwall.<sup>45</sup> Despite these problems, Cornish communities can be vibrant, uniting around cultural festivities,<sup>46</sup> which is particularly important for rural areas with regards to mutual self-help and intergenerational learning as well as maintaining heritage and traditions.<sup>47</sup> Resultant community cohesion has led to improved wellness amongst local residents,<sup>48</sup> and the storytelling and volunteering involved in communal activities improves quality of life.<sup>49,50</sup>

This can help to combat some of the isolation that can be experienced by persons in rural areas, particularly with regards to the impact of poor transport options,<sup>51</sup> and rising fuel prices.<sup>52</sup>





## Environment – Kerghynnedh

The environment impacts all areas of life, including health and the economy. A healthy environment can lead to a healthier economy.<sup>53</sup> Climate change and rising sea levels leaves some communities extremely vulnerable,<sup>54</sup> leading to considerable infrastructural adjustments.<sup>55</sup> Campaigners seeking faster action across civil society and policy, camped out at Lys Kernow (County Hall) in May 2022.<sup>56</sup> Cornwall Council is pioneering schemes to help the environment, such as the WiSe scheme, providing national training for minimising marine wildlife disturbance.<sup>57</sup> Organisations such as the Eden Project aim to educate people about environmental issues. Challenges moving forward relate to the degree to which we will be able to maximise the opportunities of our natural resources (or natural capital) such as lithium and renewable energy, without risking the exploitation (and associated societal vulnerability) that we have experienced in the past with forms of extractive industries.<sup>58</sup> This might prove particularly challenging as emphasis focuses on the opportunities to provide year-round, well-paying jobs,<sup>59</sup> meaning that policy fears the 'risks' associated with ensuring that newer industries are properly regulated and the wealth shared throughout Cornwall.

Other challenges relate to community perceptions about renewable energy projects, which may impact on our ability to capitalise on positive natural capital projects.<sup>60</sup>





# Conclusion – Gorfen

This report is the first step in describing and understanding the state of contemporary Cornwall. It has summarised what we know already from available sources. These sources often paint a more detailed and nuanced picture, than can be described in a short report. The sources themselves are very different and range from newspaper reports to rigorous academic research studies. In other words, their reliability will vary. But this variability is itself, a valuable marker for the work to be done in Cornwall. It allows us to identify the gaps in knowledge and to further explore some of the findings and observations we report.

Intuitively, those who live and work in Cornwall, in local government, the third sector, business and academia, know there is a connectivity between the problems Cornwall faces. For example, however we regard tourism, we already have evidence to indicate a link between it and housing need. On the other hand, visitors could be used more strategically as ‘ambassadors’, taking away key messages about Cornwall’s strengths beyond our amenity value. There are other more subtle connections to be understood: For example, transport, employment, business sustainability, and environmental pressures. Equally there is a connectedness between more positive features of the Cornish economy, culture and environment, sustainable energy, conservation, cultural identity and language. Problems are interconnected, but so may be their solutions.

For some, research is a luxury and this is understandable in the current economic climate where resources must be carefully deployed. But in Cornwall, as many other places, there has been a history of sometimes making sub-optimal decisions that are not derived from a strong evidence base. In SERU we believe that evidence arising from high quality research can provide a solid basis for decision making. We also believe that if research is to benefit the Cornish community, then as far as possible, it must come from that community. SERU will itself conduct research, but a key feature of our mission is to work with partners to conduct research and to facilitate organisations, in Cornwall, to conduct their own research.

Having read this report please get in touch if you have ideas for the kind of research we should be doing, would like to work with us in conducting research, or indeed if you would like us to help develop research capacity and skills in your organisation.

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