

ECONOMY FINDINGS

1. This is a summary of the key findings from Totnes Neighbourhood Plan public consultation data in relation to the economy. It draws data from Workshop 1, Workshop 2, the Housing Needs Survey and the KEVICC workshop. Both the KEVICC students and Workshop 2 participants articulated a Vision for the economy in Totnes.

1.1 KEVICC's Young peoples' vision for the economy was as follows:

- For shops and food outlets to also meet the needs of young adults. Sitting alongside independent shops.
- Shops for local people, not just tourists.
- More jobs, including jobs created especially for young people from the community.
- Less young people leaving the area because of lack of jobs and expensive houses
- Greater investment in the town (from Government)

1.2 Workshop 2 reflected an emerging Vision for the economy:

Totnes 2030 – Postcard from the future: Economy table

Hi, Wish you were here! Just finished doing my morning community work – a bunch of us from the housing co-op are meeting for lunch (everything from my back garden of course!) Having a session at the International Collaboration Centre this afternoon before our dip in the swimming hole. Xx

2: Business Survey – Summary of key findings

The business survey was sent out as an 'e-survey' in November 2015 to 335 businesses across the town via the Chamber of Commerce and other key contacts in the business community. The survey was also promoted via the local press. A range of businesses across the town were targeted including the Town Centre, Industrial Estate, Steamer Quay, Bridgetown and Follaton. We received 66 responses. A second survey in July 2016 focussed on the Industrial Estate. The key findings of the business survey are as follows:

2:1 The key assets listed by respondents to our business survey are below:

- The unique character of Totnes - in terms of its setting and historic character
- The unique character of Totnes – in terms of independent retail/business diversity
- The unique character of Totnes in terms of the people and community

- The unique 'business landscape' of the town in terms of networks of 'green' 'ethical business' in the town trying to do 'business in a different' way
- Totnes's reputation as a 'green-centre'
- Totnes provides a good climate for new start-up businesses and entrepreneurship
- Business networks and collaboration are strong
- Businesses have some shared ethics and values
- The qualities above give Totnes a good/interesting reputation and result in a strong appeal for visitors and tourists (as-well as it's geographical location in terms of being a hub for rural villages and being well linked via the train station and bus routes)
- Quality of life is a motivation for businesses starting up here. (How do we take this into account when defining what 'economy means?' (especially for our **vision**))
- Totnes attracts affluent customers/visitors/new residents

2:2 The following list was developed by KEVICC students when asked to write up the key strengths of Totnes, many of which mirror the assets listed above by businesses:

- The community – the people, diversity, community spirit, non-judgemental; multi-cultural, and the many local groups and clubs.
- The independent / locally owned shops and cafes which inject money into the local economy.
- The town's uniqueness.
- A tourist attraction – history and heritage.
- Known as a "green" / "eco" town

2:3 Barriers identified by business survey:

- The overall economic climate is a major barrier to business
- **There is a limited supply of premises and a need amongst a variety of businesses types** (new start-ups and light industrial specifically) for more suitable and affordable premises. **This finding is echoed in workshop one and two. See below**
- Transport/ road access is a barrier to business (in terms of staff travelling to work, visitors/tourists being deterred from coming and deliveries accessing the town). **Transport issues come out as a number one priority across all our data.**
- Bus capacity and frequency is also a barrier (in terms of customers finding alternative ways of getting into town without a car.) **Public transport also comes out as a priority issue in workshop one and two. Improved community transport and public transport was a top priority for respondents to our housing needs survey**
- Parking (both availability and charges) are also major barriers as is traffic flow on the high street. **Parking also comes out as a priority issue in workshop one and two and our housing needs survey**
- Very few businesses which responded are employing students, trainees or people on government training schemes. **However, the 2016 survey of the Industrial estate showed**

75% of businesses who responding provided work experience or apprenticeships. This may reflect the predominance of small high street businesses responding to the 2015 business survey and the draw for young people to seek work experience in the familiar High Street rather than the Industrial Estate.

- Totnes attracts affluent customers/visitors/new residents/second homeowners. In terms of local people living on a local wage, this can mean retailers cater for this market, leaving less practical affordable shops/cafes for local people. See workshop 2 analysis for further information.
- There is a separation between the industrial estate and the high street/town centre (a particular issue for businesses who also retail from their units)

3: Workshop One

3:1 Workshop one was attended by 150 people on July 20th, 2015 at the Mansion.

Similarly to workshop two, the economy gained the least comments of all the themes. We believe this may be due to the fact that people who aren't running their own businesses may not feel qualified to answer questions on the economy. Further work needs to be done on how we define and present the economy to people and ask for their views and opinions.

3:2 More premises (at affordable rates) are needed for businesses

- The most commented on theme within the economy at workshop one was affordable business/retail units which reflects the emphasis put on premises in the business survey (see above)
- The need for more/improved business premises also arose from workshop two participants (see below)

3:3 Retail diversity

- The second most commented on theme at workshop one was a concern for the diversity of the high street being undermined, which as we know from our business survey is a key selling point of the town: Example comments on this were as follows: **'Honiton was destroyed as a town by a Plethora of Antique shops, reducing retail diversity. This will happen to Totnes if the fancy gift shops/art shops are not stopped.'** **'No more charity shops'** said another
- KEVICC students also highlighted the value of retail diversity and the independent shops and cafes within the town (see below). They made a link between this and tourism.

4: Workshop Two

4:1 Our second public workshop held at the Totnes Civic Hall was attended by 65 people on November 28th, 2016. Data collected on the economy for this topic was sparse when compared to other data as per workshop one. The following is a summary of the findings:

4:2 The top four priorities from this table were:

1. Reflecting on the role of retired people in the economy (linked to mixed housing and retirement. How does it change the nature of services and purchases?)
2. Affordable rent
3. More local food
4. A job hub and opportunities for young entrepreneurs (incubation and mentorships)

The majority of people who commented on the economy (9) didn't work in Totnes (only 7 people who commented worked in Totnes.)

4:3: When asked which sector they worked in, the top four were as follows:

1. Charitable sector
2. Gallery/arts and antiques jointly with health and care and education

4:4 The services in Totnes most used by workshop attendees were:

- **Retail** (food)
- **Retail** (non- food)
- **Entertainment** (including eating out)

4:5 New/improved more affordable premises are needed for businesses.

There were 5 comments across the data from the economy table about the need for employment space in Totnes from various points of view:

- 'There's limited space for light industrial as the industrial estate is more retail, entertainment, offices etc. Light industrial cannot be placed elsewhere due to nuisance issues. Where do you want them to go?'
- 'More high quality spaces for small business'
- 'more affordable spaces for enterprises – food processing'
- 'would like to see some way of ensuring affordable rent for retail and light industrial premises for independent enterprises – address absentee landlords who don't have the needs of the town at heart.'
- 'more affordable business spaces'

4:6 When asked what goods and services people would like to be able to access more of in Totnes, the following themes emerged:

4:7 More practical shops for local people, comments below:

- 'encourage more local businesses that people on average incomes can afford'
- 'more practical shops selling essentials: underwear, clothes shops including men'
- 'more local functional shops providing all life needs'

- 'DIY' 'young peoples' clothes'
- Good quality all round department store

Comments on the need for more affordable 'practical shops' for local people also came out of findings from workshop one and the KEVICC workshop. **'Strongly encourage shops that are good for local people &/or tourists with a lower income'** said an attendee at workshop one.

This may reflect the fact that Totnes does attract affluent visitors and new residents to the town as we saw from our business survey findings (refer to business survey analysis document.) Whilst this is good for local retailers, it could mean that retailers in the town to cater to this market specifically, leaving less practical and affordable shops for local people who then have to travel elsewhere to meet those needs.

The amount of charity shops on the high-street is representative of the difficult economic climate, a high rate of turnover amongst retailers (though it is below the national average) and high business rates on the high street.

4:8 A Green Economy to build on

As we saw in our business survey, the reputation for Totnes as a 'green-centre' with good networks of **ecologically minded enterprises**, is attractive to both new entrepreneur's and businesses as-well as ethically minded aware customers wanting to make discerning choices with their money.

Workshop one also identified a desire from local residents to encourage green businesses to strengthen and set up within the town : **'Encourage green industry and development - make Totnes a show case and encourage industries to work together to share resources in order to limit wasting energy.** 'said one. **'Renewable energy is a growing business sector and should be included in an economic plan'** said another. We need **'incentives for local people to set up businesses that benefit the locality including from a sustainability stance'** said a third.

From the point of view of the consumer, green/ethical businesses are also clearly in-demand. When asked what goods and services people would like to be able to access more of in Totnes, there were also multiple comments about a desire for more 'ethical' 'green' businesses in the town.

- 'Renewable energy gadgets on sale'
- 'ethical, green, DIY, young peoples clothes
- 'More affordable independent start ups '
- 'Green economy shops; locally made food and drinks'
- 'Ethically produced clothing; independent book store'
- Swap shop, second hand furniture store, not just charity'
- 'local shops sell local goods from growers/makers/producers
- 'swap shops and online sharing services'

5: Housing Needs Survey

5:1 A Housing Needs Survey (HNS) was undertaken in summer 2015. Questionnaires were delivered to every household in the town with a total of over 620 responses received representing a response rate of around 16%.

5:2 Wages in Totnes are below the national average, whilst housing prices are above the national average. The South Hams has amongst the worst affordability ratio in Devon¹. The result is very low availability of genuinely 'affordable' housing in Totnes for those on a local wage, which means many people who work in Totnes can't afford to live here.

6: KEVICC workshop

6:1: Working with Planning for Real, the Neighbourhood Plan ran a workshop with 110 year 10 students from KEVICC in November 2015

The economy was a low priority for KEVICC students and had the least comments made against it (with the exception of culture and heritage which came bottom).

6:2 Employment:

- The students identified the need for more work / employment opportunities for younger people seeking experience and full time employment in order to keep young people in the area and stop them looking for work elsewhere.
- They highlighted that there were few places that attracted young people to work here.
- They suggested that Totnes should bring more businesses to the town.

One attendee at public **workshop two** offered a different view of working in Totnes as a young person: '**Totnes is an exciting place to live as a young person (not perfect!) as the economy is full of opportunities for a really wide range of employment opportunities including self-employed.**' This comment coupled with the prioritisation of '**A job hub and opportunities for young entrepreneurs (incubation and mentorships)**' at workshop two, suggests that perhaps Totnes needs to address employment for young people in a different way by focusing more on supporting young people to become self-employed and entrepreneurial as opposed to relying on traditional employers.

6:3 Tourism

- Students recognised the importance of tourism to Totnes's economy and that the very healthy range of independent shops and cafes was seen as good. **This echoes the findings from the business survey.**
- They suggested that tourism could be increased through wider spread advertising.

- Totnes should appeal to all ages. It was suggested that creative media other than art should be developed and that Totnes Radio needs to be bigger and better known.

6:4 Lack of opportunities or entertainment for young people:

- There was a view that existing shops mostly focussed on elderly and tourists; that there was a lack of practical shops for local people; and that there was a need to reduce the number of Charity shops. **This corroborates comments made at workshop one and two.**
- It was felt that if more young people stayed in Totnes, then there would be more shops aimed at young people.
- It was also mentioned that businesses restrict access e.g. some teenagers are not allowed in some cafes.
- Again, as with the Housing Theme, there was mention of Totnes being too expensive for young people to live in or move to. **This clearly supports other evidence about the need for affordable housing.**

6:5 This is the kind of development they would like to see in Totnes in relation to the economy: *Flags placed on large map of Totnes:*

- Locate employment land here: Station Road; Western By Pass south of Town beyond end of Leechwell Street; Bridgetown – Westfields area; Dairycrest site
- Opportunities for cafes , businesses by Leisure Centre: Totnes Pavilion (part of Borough Park)
- Original unique businesses (handcrafted and handmade): South Street
- Skills and Training Centre: Town Centre area; Dairycrest site.
- Starter business unit: High Street near junction with South Street
- Volunteer Centre: Town Centre area
- Workshops: Dairycrest site; Bridgetown area.

7: Industrial Estate Survey

7:1 Reflecting on the results of the Businesses survey, a further extensive and detailed survey was conducted focussing on the Industrial Estate in July 2016. Follow up interviews were offered to gain in depth information. A full report can be found at www.totnesneighbourhoodplan.org

Questionnaires were sent to 81 businesses with the offer of follow up interviews. 42 responded, a high rate of 52% compared with a 20% return with the business survey. The survey demonstrated the significant contribution the Industrial Estate makes to the town's economic health. It also highlighted the longevity of businesses and the potential contribution to between 1/4 and 1/3 of jobs in the town.

7:2 Key Findings

- Local and Family businesses make up almost 70% of businesses
- Markets are both local and international with physical public access to over half of businesses
- There are both traditional industrial estate and High Tec businesses
- These contribute between 1/4 and 1/3 of jobs in the town
- The Green economy comprises 15% of businesses
- A significant contribution to young people is made through work apprenticeships and work experience. 75% of respondents with work experience double apprenticeships

7.3 Improvements required to support businesses

- Potential marketing the Estate as Technology and Services Park rather than an Industrial estate to reflect the diversity of businesses
- Address parking for those on estate business, employees, suppliers and customers
- Improve the presentation of the Estate including signage, planting, maps
- Improve facilities such as a café/shop, broadband, night time security
- Address Traffic and access, location means that 5pm rush hour through traffic from Torbay and Plymouth/South Hams stops customers/ workers entering and leaving the estate.
- Flood prevention affecting insurance but now being addressed by Environment Agency
- Waste management improvements for small businesses. Community owned facilities

8: Summary of key findings emerging from public consultation data – Economy

8:1 Top priorities for the economy (with strong links to culture and heritage)

- Protect and enhance the character of the town both in terms of landscape setting, conservation areas and also culture (*links to culture and environment*)
- Build on the reputation of Totnes as a green-centre' (both in terms of attracting new 'green/ethical businesses' and 'green/ethical' tourists and visitors)
- Protect and enhance retail diversity and vitality
- Improve availability of business premises at better rates
- Improve access to the town for via public transport and cycling/walking (*links to transport*)
- Create new carparks and make parking more affordable
- Create more employment opportunities for young people
- Create more 'cultural' spaces for young people (*links to culture*)
- Ensure there is a balance between shops/cafes/businesses for tourists and visitors and local people (how?!)

9 How might we integrate these priorities into the Neighbourhood Plan?

9:1 Protecting and enhancing the character of the town

- Include policies on preserving and renovating conservation areas (Culture & Heritage group)
- Enhance the visitor experience of the town by including policies on better signage and street furniture (Culture & Heritage group)
- Include policies around protecting the market town setting (i.e green-belt) as per Natural England suggestions in their 2015 report (relates to culture and heritage)

9:2 Protect and encourage retail diversity and vitality

- Include policies on retail diversity (see CPRE food webs report- Economy Group & Environment Group)
- Include policies on vitality (see CPRE food webs report – Economy Group and Environment Group)
- Include policies on markets (see CPRE food webs report – Economy Group/Environment Group/Culture and Heritage Group)
- Include policies (and a plan for) better facilities/premises for businesses of varying sizes and affordability (Economy Group)
- How do we bring in more affordable businesses/shops that cater to local people?

9:3 Improve availability of businesses premises at better rates

- Include policies on protecting employment land from housing development (can we do this?)
- Identify potential sites for employment land
- Engage developers wanting to build employment space (community developers?)
- Build more of an evidence base around this issue? (ATMOS?)
- Include policies on mixed-use development
- Look at provision from ATMOS on this?

9:4 Improving access to the town

- **Policies on parking and parking charges:** Identify new land for parking and make parking more affordable (community owned parking sites?)
- Further develop **park and ride and park & stride?**
- **Policies to Improve footpaths and cycle paths** around the town (this has come out as a priority in the housing needs surveys and workshop one and two)

9:5 Create more employment opportunities for young people

How can this be done within the Neighbourhood Plan

9:6 Create more 'cultural' spaces for young people (links to culture)

How can this be done within the Neighbourhood Plan?

10: Next steps and discussion points

- Do we have enough data from businesses (108 interviewed) to represent their views?
- The economy gained the least comments of all the themes in the public workshops. We believe this may be due to the fact that people who aren't running their own businesses may not feel qualified to answer questions on the economy. Further work needs to be done on how we define and present the economy to people and ask for their views and opinions.
- How do we address the issue of young people feeling excluded from shops/cafes/culture in the town? (*clear links to culture and heritage*)
- How do we address the apparent lack of employment for young people? (Relates to housing and house prices)? Can we address these issues in the Neighbourhood Plan?
- How can we make better links between the industrial estate and the high street and make the industrial estate a more appealing/attractive place to visit? Can this be addressed through the NP?
- How do we ensure our local businesses are able to make a profit from 'affluent tourists' and people moving down here from wealthier areas, whilst meeting the needs of long term locals on a local wage (i.e below the national average)? Can this be addressed by the NP?
- The amount of charity shops on the high-street is representative of the difficult economic climate, a high rate of turnover amongst retailers (though it is below the national average) and high business rates on the high street .

11: What could be done outside of the Neighbourhood Plan to address the findings of this survey?

- Market the town nationally as a good location to start a green business
- Market the town as an eco-tourism town, using it's unique, quirky character and alternative culture as its USP
- Market the town as a Town of diverse Markets and Festivals with a year round offer
- Work with KEVICC some more to see what might easily be implemented now to address the students' concerns about employment, etc.

12: What barriers cannot be dealt with within the Neighbourhood Plan?

- The general economic climate (though the local economy can be improved)
- Business rates and rents on existing properties



November 2016

- Traffic and congestion (limited – we can attempt to influence high-ways but this is a long-term project)
- Prioritise walking and cycling access in line with community priorities
- Traffic flow on the high-street (County Council issue)
- Encouraging businesses to recruit people on government employment schemes, apprenticeships and students.

¹ <http://www.devonomics.info/place/housing-affordability>