Evidence Review

Draft 1

Strategy and Action: The Economic Development Strategy for Cornwall and the Isles of Scilly

2006-2021

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INTRODUCTION

Evidence base review

The document at this point in time (4th November 2005) is still very much work in progress.

Some 60 or so reports and documents have been examined and extracts of data have been taken and included in the tables of Data below. Cornwall and the Isles of Scilly Economic Forum has worked closely with LINC, the County Council intelligence department and many partner organisations to obtain access to appropriate information and have endeavoured to cover as many issues as is possible to encompass in one document.

A summary of the 7 key documents are mentioned later in the introduction.

The nest stage of the evidence base review is:-

- Identify the missing /gaps in data (taking note that much of this information is under review and updates will be shortly available and used to update this document) – This will be complete by Friday 11th November 2005.

- Create a specification for tender for an economic analyst to produce interpretation of data where this is not already available – This will be complete by Friday 11th November 2005.

- Add to the document the additional data analysis and the interpretation - – This will be complete by early December 2005.

- Continually review and update the data until the post 2006 bid process is complete – ongoing process.

In producing the document to date we have endeavoured to retain it in a word document format so as to make it user friendly, however the size is now at a level which could well be described as maximum for the proposes of electronic communication and stability.

Key sources of data

The Cornwall County council research and information department produced the report which contains 40 pages of tables a summary of the content is below

Cornwall and the Isles of Scilly Economic Trends

The tables are structured into the following sections:

1. Population
2. The Labour Market
3. Economic Performance
4. Business Composition and Performance
5. Tourism
6. Skills and Learning
7. Deprivation Indicators

The data does not have expert interpretation and as such would need commentary for our purposes.

Research shows many additional sources of data and the following are the 7 (of many) principal data tables available for the review of the evidence in respect to the state of the Cornish economy and appear to many or all the issues needed for a long list of key indicators of the state of the economy for the County of Cornwall and the Isles of Scilly.

1. Sub regional indicators

This report produced by the South West Regional Development Agency / regional observatory is split into 3 elements:

1. Economic Performance
2. Business Performance
3. Labour Market

The data in this report does need the addition of an expert commentary of what such data means to the economy of the county. Although updated frequently and is extremely wide reaching this is not as up to date as the LINC data and the Owen Nankivell reports mentioned below.

2. LINC Data

The second data set is the LINC key economic indicators

LINC Key economic indicators

ECONOMIC VITALITY

GVA per head
Housing affordability - Joseph Rowntree Foundation
Town centre yield

LABOUR MARKET

Average hourly earnings
Average weekly earnings Household income
Self employment rate

EMPLOYMENT

Economic activity rate
Unemployment rate 16/03/05
Working age population claiming benefits

LEARNING & SKILLS

Poor literacy and numeracy
Pupils with 5+ GCSEs grades A*-C
Working age population with no qualifications
BUSINESS ACTIVITY

VAT businesses per 10,000 population
Start up rate of new businesses per 1,000 population

To which we have added:-

- Broadband coverage from ACTNOW quarterly updates

- Split weekly earnings into
  Weekly earning by district – residence based
  Weekly earnings by district – workplace based
- Indices of deprivation by map of the county

The data produced by LINC is the most up to date and gives the summary data we need to gain the overall impression of the economy

It also does not set out to give a commentary and this will be required

3. Objective One - Mid Term Review and S.P.D.

The 3rd report is the mid term review of the performance of the current objective one programme and this is split into 2 reports:

The mid term review evaluation report,

and

The update to the mid term review

The content of the former has to a large extent been overtaken by the data with the other reports referred to in this paper and the additional content makes reference to the progress of the objective one programme by priority and measure.

Both have a commentary and interpretation on the progress to date – but it is what the report does not set out to say is equally relevant (note that the purpose of documents in question was to demonstrate the qualification for the mid term review bonus of 4% and not indicate other issues such as “weaknesses”).

The SPD has an excellent section on the baseline data but was of course was written in 1999 and some of the data sets are now well out of date.

4. Cornwall Economy 1993 – 2003

The forth report is the Cornwall Economy 1993 – 2003 from Owen Nankeivell

Which is useful in two ways:-

1. it contains substantial data on the sectors

2. it contains an expert interpretation on what the data means

Contents

Part I Overview

Part II Analysis of Individual Sectors

a) Agriculture and Forestry
b) Fishing
c) Mining and Quarrying
d) The Electricity, Gas and Water Supply Sector
e) Construction
f) Primary Production Summary

2. Manufacturing
a) General
b) Food, Drink and Tobacco Manufacturing

3. Wholesale, Retail and Repair
a) Sale and Repair of Motor Vehicles
b) Wholesale
c) Retail
d) Wholesale, Retail and Repair Sector Summary

5. Transport and Communications
a) Land Transport
b) Sea and Air Transport
c) Transport Services
d) Telecommunications

6. Finance and Business Services

7. Public and Other Community Services
a) Public Administration
b) Education
c) Health
d) Social Work and Other Community Services
e) Public and Other Community Services Sector

Part III The Outcome of the Cornwall Economy 1993 to 2003

a) Summary
b) Conclusions

The added strength to this report is it also produced at district level giving the most detailed data that is possible expect and is about a as up to date as can be produced and again has the expert interpretation on the meaning of the data.

Whilst much of this report has been included there we do recognise that in all reports there will be some interpretation or methodology that may not be the same as other reports therefore there will be differences.

We have not included the analysis at distinct level which is also available simply because of document size.

5. Regional Economic Strategy – evidence base review

The 5th element of data id the Regional Economic Strategy – evidence base, which has data at county level on many data sets and where this report does not show Cornwall specifically it has been possible to gain such data from either the RDA economists who produced the report or the equivalent from LINC.

6. Migration statistics

The 6th data set is the migration statistics for the county produced by Malcolm Brown from the 2001 census. This presentation goes into detail as to the change in migration patterns and will require an expert interpretation.

7. Quality of Life Survey

The 7th data set is a recently produced quality of life survey produced by Cornwall County Council research and Information unit in 2004, using the audit commission quality of life indicators piloted in local authorities in 2003. Again this will need some interpretation.

Additional Areas

We then start to delve into specific areas of interest such as

Sectors –
- key
- priority
- emerging

The sectors have been covered in 3 ways

- via the Owen Nankivell report
- via sector reports created by LINC
- via sector organisation reports (such as tourism)

Whilst it is possible to obtain data on (for example) tourism there is some question on the "accuracy" of the information available, in that it may have been obtained by a survey and not directly by central government departments so in soma cases 3 separate sources of data have been included .

Key infrastructure:

Airport

Data is available on the impact of the Airport and is included but additional data will be required as the development needs of the airport become understood. Additional studies are underway with a wider understanding of economic impact for the 3 the options available.

Sites and premises

The site and premises group are aware that district authorities are currently reviewing the demand / supply information to better understand the needs for future periods.

Broadband

As Cornwall has the benefit of the Actnow project we have taken key data form the records of the project which gives a unique but not necessarily comparable data.

TRENDS & PROSPECTS

- **Earnings**

Weekly earnings - median - full-time workers - workplace-based in Cornwall for 2004 stands at 78.06% of the UK average at £329.50 compared with £422.10. There has been a slight rise from 1999 to 2004 from 75.37% if this growth rate was to continue it would take well over 50 years for the earnings levels to reach the UK average.

The highest 2004 earnings of the districts is Restormel with £336.1 or 79.63% of the UK average, the lowest being Penwith at £298.20 or 70.65%. However the figures for Restormel show a decline against the UK average from 84.74% in 1998 whereas Penwith has grown from 65.18% since 1998.

Caradon earnings show a similar growth rate as Penwith from 71.69% in 1998 to 76.76% for 2004 as does Kerrier with a rise from 74.62% to 79.85%, however Carrick 77.46% in 1998 to 79.06% in 2004 and North Cornwall 75.13% in 1998 to 77.85% in 2004 show much more modest comparative increases.

Weekly earnings for full-time workers (median) - residence-based in Cornwall
The purpose of this variant on the method of calculation is to demonstrate the low level of earnings opportunities within the county compared with other locations.

For 2004 the figures show a slightly better picture with a Cornwall average of £348.10 compared with the UK average of £422.10 (82.47%) .Caradon shows the greatest difference (presumably benefiting form the Plymouth TTW area effect) with a weekly earnings figure of £400.60 or 94.9% of the UK average compared with a figure of £324.00 (workplace based).

The advent of flexible working opportunities through the widespread availability of broadband technology will offer increasingly more opportunities for residence of Cornwall to raise their levels of incomes and at some future stage there will be a need a further analysis to obtain a measurement of this impact .

Weekly earnings for full-time (workers median) - residence-based

Year	*Caradon*	*Carrick*	*Kerrier*	*North Cornwall*	*Penwith*	*Restormel*	*Cornwall and Isles of Scilly*	*South West*	*United Kingdom*
2002	345.5	319.2	310.2	306.3	261.8	325.1	311.4	367.1	390.9
2003	386.3	385.5	324.4	301.5	300.8	335.9	345.7	383.9	404.0
2004	400.6	361.4	325.1	334.3	315.6	333.7	348.1	398.3	422.1

Source: ASHE © Crown Copyright / LINC

Weekly earnings for full-time workers (median) - workplace-based									
	Caradon	**Carrick**	**Kerrier**	**North Cornwall**	**Penwith**	**Restormel**	**Cornwall and Isles of Scilly**	**South West**	**United Kingdom**
1998	240.1	259.4	249.9	251.6	218.3	283.8	253.4	314.8	334.9
1999	249.4	257.1	272.8	241.9	221.3	273.6	260.4	323.9	345.5
2000	245.9	280.7	284.4	274.5	238.3	298.1	276.2	336	359
2001	283.8	294.6	301.4	265.8	269.7	319.1	296.9	352.3	375.9
2002	302.9	298.4	320.2	293.3	261.3	307.8	303.4	364.9	390.9
2003	307.2	370.8	356.7	296.2	272.6	347.9	364.1	382	404
2004	324	333.7	335.8	328.6	298.2	336.1	329.5	393	422.1
Variance									
2002	14.1%	7.0%	-3.1%	4.4%	0.2%	5.6%	2.6%	0.6%	0.0%
2003	25.7%	4.0%	-9.1%	1.8%	10.3%	-3.4%	-5.1%	0.5%	0.0%
2004	23.6%	8.3%	-3.2%	1.7%	5.8%	-0.7%	5.6%	1.3%	0.0%

Source: ASHE © Crown Copyright / LINC

EARNINGS BY OCCUPATION (2001-2002)						
Occupation Group	**Cornwall**		**South West**		**Great Britain**	
	2001	**2002**	**2001**	**2002**	**2001**	**2002**
Managers and Senior Officials	#	#	651.8	683.8	732.0	747.5
Professional Occupations	525.7	565.8	597.3	616	637.3	650.6
Associate Professional and Technical Occupations	421.8	447.2	474.7	491.7	516.9	527.9
Administrative and Secretarial Occupations	#	#	307.0	322.1	324.7	338.3
Skilled Trades Occupations	322.8	343.3	377.3	388.1	397.6	412.4
Personal Service Occupations	#	#	255.0	259.0	274.1	282.9
Sales and Customer Service Occupations	#	#	274.2	275.3	294.0	288.9
Process, Plant and Machine Occupations	318.5	358.4	352.3	373.1	357.9	373.8
Elementary Occupations	247.5	270.6	281.5	300.4	294.5	306.0
Total	365.2	397.5	431.1	448.5	464.6	475.8

Source: New Earnings Survey 2001 & 2002/ residence based (ONS © NOMIS) / Socio-Economic Stats for Cornwall, Research and Information, Cornwall County Council

- **Gross Disposable Household Income**

GROSS DISPOSABLE HOUSEHOLD INCOME (£ PER HEAD) (CORNWALL)			
Years	**Cornwall and Isles of Scilly**	**South West**	**United Kingdom**
1995	7812	8692	8602
1996	8219	9124	9086
1997	8603	9723	9662
1998	8823	9977	9920
1999	9085	10445	10385
2000	9869	11135	11117
2001	10808	11953	11889
2002	11216	12266	12210
2003	11639	12753	12637

Source: Regional Accounts, ONS Crown Copyright/ LINC – Local Intelligence Network Cornwall

GROSS DISPOSABLE HOUSEHOLD INCOME BY NUTS[1] 1, 2 AND 3 AREAS				
Area	**£ million**			
	2000	**2001**	**2002**	**2003**
United Kingdom	653,466	701,408	722,767	750,946
South West	54,870	59,056	60,980	63,511
Cornwall & Isles of Scilly	4,954	5,407	5,656	5,929

Source: SW Regional Development Agency - Sub-regional Indicators July 2005

[1]Nuts is a hierarchical classification of areas that provides a breakdown of the EU's economic territory

GROSS DISPOSABLE HOUSEHOLD INCOME BY NUTS[1] 1, 2 AND 3 AREAS				
Area	**£ per head**			
	2000	**2001**	**2002**	**2003**
United Kingdom	11,117	11,889	12,210	12,637
South West	11,159	11,947	12,276	12,704
Cornwall & Isles of Scilly	9,958	10,769	11,132	11,546

Source: SW Regional Development Agency - Sub-regional Indicators July 2005

GROSS DISPOSABLE HOUSEHOLD INCOME BY NUTS[1] 1, 2 AND 3 AREAS				
Area	**£ per head (UK=100)**			
	2000	**2001**	**2002**	**2003**
United Kingdom	100	100	100	100
South West	101	101	101	101
Cornwall & Isles of Scilly	90	91	91	92

Source: SW Regional Development Agency - Sub-regional Indicators July 2005

[1]Nuts is a hierarchical classification of areas that provides a breakdown of the EU's economic territory

ANNUAL GROWTH IN GROSS DISPOSABLE HOUSEHOLD INCOME (GDHI) (£ and £ per head)								
	GDHI (%)				GDHI per head (%)			
Area	2000	2001	2002	2003	2000	2001	2002	2003
UNITED KINGDOM	7.4	7.3	3.0	3.9	7.0	6.9	2.7	3.5
SOUTH WEST	7.7	7.6	3.3	4.2	6.9	7.1	2.8	3.5
Gloucestershire, Wiltshire & N. Somerset	7.3	7.2	2.8	3.8	6.7	6.7	2.3	3.2
Bristol	6.7	7.0	3.0	3.8	6.8	7.1	3.1	3.3
N, N.E Somerset, S Glos	6.5	6.1	2.3	3.6	5.5	5.6	2.0	3.1
Gloucestershire	7.7	7.3	2.5	3.6	7.1	7.2	2.3	3.1
Swindon	7.0	7.6	3.5	4.0	6.9	7.3	3.3	3.6
Wiltshire	8.4	8.6	3.6	4.3	7.7	7.3	3.0	3.2
Devon and Somerset	7.9	8.0	3.4	4.3	7.1	7.3	2.8	3.7
Bournemouth & Poole	7.7	7.2	2.5	3.6	7.3	6.9	2.6	3.8
Dorset	7.6	7.9	3.7	4.5	6.5	7.4	2.9	3.6
Somerset	8.2	8.5	3.6	4.6	7.4	7.5	2.7	3.6
Cornwall & Isles of Scilly	9.1	9.1	4.6	4.8	8.0	8.1	3.4	3.7
Devon	7.6	7.6	3.5	4.3	6.6	7.0	2.9	3.8
Plymouth	6.8	6.2	2.7	3.6	7.0	6.6	2.5	3.5
Torbay	8.3	7.0	2.9	3.8	6.5	5.8	2.5	3.2
Devon	7.7	8.1	3.8	4.6	6.4	7.4	3.1	4.0

Source: SW Regional Development Agency - Sub-regional Indicators July 2005

Comment referring to the Jobs and Earnings by Sector Analysis chart below:

14: *Other Mining and quarry* – pay level perhaps surprising?
16: *Manufacture of tobacco products* – no presence in Cornwall
37: *Recycling* – Low pay levels but hugely important for the environment and possible R&D Spinoffs
52: *Retail Trade* - Despite poor pay levels this sector is playing a big part in growing the Cornish economy (see local GVA report)
55: *Hotels and Restaurants* - One of the worst paid industries but accounts for almost double the proportion of employees in Cornwall compared to national.
67: *Activities auxiliary to financial intermediation* - This value is very high when measured using the mean average but *much* lower when you look at the median, therefore it is reasonable to conclude that there are a few very high earners in this category that push the mean up.
72: *Computer and related industries* – Use and development of ICT set to be important in strengthening the knowledge economy in Cornwall.
73: *Research and development* – The employee figures are for 2003 so the effect of the CUC would not yet feature.

Jobs & Earnings by Sector

KEY: **Bold red = pay 20%+ over average**; *Italic blue = pay 20%+ under average*; Highlighted fill = noteworthy differences b/n Cornwall & GB	Full-time workers as a % of all full-time workers (2003)			
	Cornwall & Isles of Scilly	**GB**	**UK gross average (mean) pay (2004)**	
	employees (%)	**employees (%)**	**£/week**	**% of average**
All industries	100.0%	100.0%	504.9	100%
01 : Agriculture, hunting and related service activities	0.2%	1.0%	349.0	*69%*
02 : Forestry, logging and related service activities	0.0%	0.0%	363.5	*72%*
05 : Fishing, operation of fish hatcheries and fish farms; service activities incidental to fishing	0.3%	0.0%	414.4	82%
10 : Mining of coal and lignite; extraction of peat	0.0%	0.1%	628.3	**124%**
11 : Extraction of crude petroleum and natural gas; service activities incidental to oil and gas extraction excluding surveying	0.0%	0.1%	793.0	**157%**
12 : Mining of uranium and thorium ores	0.0%	:	:	:
13 : Mining of metal ores	0.0%	:	:	:
14 : Other mining and quarry	1.5%	0.1%	528.1	105%
15 : Manufacturing of food and beverages	5.0%	2.2%	447.8	89%
16 : Manufacture of tobacco products	0.0%	0.0%	666.9	**132%**
17 : Manufacture of textiles	0.4%	0.5%	395.2	*78%*
18 : Manufacture of wearing apparel; dressing and dyeing of fur	0.2%	0.2%	329.4	*65%*
19 : Tanning and dressing of leather; manufacture of luggage, handbags, saddlery, harness and footwear	0.0%	0.1%	343.7	*68%*
20 : Manufacture of wood and products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	0.7%	0.4%	408.4	81%
21 : Manufacture of pulp, paper and paper products	0.4%	0.4%	479.2	95%
22 : Publishing, printing and reproduction of recorded media	1.8%	1.6%	539.6	107%

23 : Manufacture of coke, refined petroleum products and nuclear fuel	0.0%	0.1%	660.6	**131%**
24 : Manufacture of chemicals and chemical products	0.2%	1.1%	593.6	118%
25 : Manufacture of rubber and plastic products	0.9%	1.1%	417.8	83%
26 : Manufacture of other non-metallic mineral products	0.5%	0.6%	457.2	91%
27 : Manufacture basic metals	0.1%	0.5%	490.7	97%
28 : Manufacture of fabricated metal products, except machinery and equipment	0.8%	1.8%	448.0	89%
29 : Manufacture of machinery and equipment not elsewhere classified	1.5%	1.5%	490.6	97%
30 : Manufacture of office machinery and computers	0.0%	0.2%	513.4	102%
31 : Manufacture of electrical machinery and apparatus not elsewhere classified	0.8%	0.7%	480.2	95%
32 : Manufacture of radio, television and communication equipment and apparatus	0.2%	0.4%	565.5	112%
33 : Manufacture of medical, precision and optical instruments, watches and clocks	0.6%	0.6%	516.2	102%
34 : Manufacture of motor vehicles, trailers and semi-trailers	0.1%	1.1%	559.1	111%
35 : Manufacture of transport equipment	1.2%	0.8%	563.7	112%
36 : Manufacture of furniture; manufacturing not elsewhere classified	1.1%	0.9%	416.8	83%
37 : Recycling	0.1%	0.1%	370.4	*73%*
40 : Electricity, gas, steam and hot water supply	0.3%	0.5%	632.7	**125%**
41 : Collection, purification and distribution of water	0.2%	0.1%	518.4	103%
45 : Construction	7.2%	6.0%	507.3	100%
50 : Sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel	5.3%	2.6%	462.3	92%
51 : Wholesale trade and commission trade, except of motor vehicles and motorcycles	4.6%	5.4%	511.3	101%
52 : Retail trade, except of motor vehicles and motorcycles; repair of personal and household goods	10.1%	6.8%	362.6	*72%*
55 : Hotels and restaurants	8.2%	4.3%	317.9	*63%*
60 : Land transport; transport via pipelines	2.6%	2.6%	440.4	87%
61 : Water transport	0.1%	0.1%	532.9	106%
62 : Air transport	0.0%	0.4%	595.2	118%
63 : Supporting and auxiliary transport activities; activities of travel agencies	0.7%	2.1%	505.6	100%
64 : Post and telecommunications	1.4%	2.5%	539.1	107%
65 : Financial intermediation, except insurance and pension funding	1.1%	2.8%	653.5	**129%**
66 : Insurance and pension funding, except compulsory social security	0.3%	1.0%	604.2	120%
67 : Activities auxiliary to financial intermediation	0.3%	1.2%	904.2	**179%**
70 : Real estate activities	2.1%	1.7%	501.3	99%
71 : Renting of machinery and equipment without operator and of personal and household goods	0.6%	0.6%	407.2	81%
72 : Computer and related activities	0.6%	2.3%	725.9	**144%**
73 : Research and development	0.4%	0.5%	660.9	**131%**
74 : Other business activities	6.8%	11.8%	547.9	109%

75 : Public administration and defence; compulsory social security	6.3%	6.4%	495.4	98%
80 : Education	7.6%	6.7%	496.8	98%
85 : Health and social work	9.8%	8.6%	472.2	94%
90 : Sewage and refuse disposal, sanitation and similar activities	0.6%	0.5%	477.7	95%
91 : Activities of membership organisations not elsewhere classified	0.5%	0.6%	465.3	92%
92 : Recreational, cultural and sporting activities	2.2%	2.2%	575.0	114%
93 : Other service activities	1.1%	1.1%	377.2	*75%*
95 : Private households as employers of domestic staff	0.0%	0.0%	304.8	*60%*
96 : Undifferentiated goods producing activities of private households for own use	0.0%	:	:	:
97 : Undifferentiated services producing activities of private households for own use	0.0%	:	:	:
99 : Extra-territorial organisation and bodies	0.0%	0.0%	551.6	109%

Source: Annual Business Enquiry and Annual Survey of hours and earnings, ONS Crown Copyright Reserved / LINC

- **Self Employment**

SELF-EMPLOYMENT AS A % OF ALL WORKING AGE IN EMPLOYMENT (CORNWALL)									
YEARS	Carradon District	Carrick District	Kerrier District	North Cornwall District	Penwith District	Restomel District	Cornwall and Isles of Scilly	South West	United Kingdom
2000	17.5	15.4	SD	19.2	SD	19.2	MD	14.0	MD
2001	16.3	19.4	SD	28.0	23.6	SD	MD	13.7	MD
2002	21.2	13.2	18.6	28.7	27.0	SD	MD	14.2	MD
2003	20.6	15.3	18.1	28.0	26.2	SD	MD	13.7	MD
2004	15.0	15.0	12.9	25.5	25.2	14.5	18.1	14.0	12.2

Source: Local area labour force survey, ONS Crown copyright / LINC – Local Intelligence Network Cornwall

Cornwall Economy

- Gross Value Added is 62% of UK average in comparison to 91% for the South West (2002)
- Average weekly earnings (for full-time workers) within Cornwall is 22% below the UK average (£330 in comparison to £422 respectively)."
- 37% of Cornwall's population is economically inactive (2001 Census)
- In January 2005, unemployment was 3.1% in Cornwall (2.3% in England & Wales). In September 2005, unemployment was 1.5% in Cornwall (2.3% in England & Wales) reflecting differences in seasonal unemployment.

- **VAT registrations**

VAT REGISTRATIONS PER 1000 POPULATION (CORNWALL)										
YEARS	Carridon District	Carrick District	Kerrier District	North Cornwall District	Penwith District	Restomel District	Isles of Scilly	Cornwall and Isles of Scilly	South West	United Kingdom
1999	36.0	36.0	30.0	50.0	33.0	30.0	75.0	36.0	33.0	30.0
2000	36.0	36.0	30.0	49.0	33.0	30.0	74.0	36.0	34.0	30.0
2001	36.0	37.0	30.0	49.0	34.0	30.0	76.0	36.0	34.0	30.0
2002	36.0	37.0	30.0	49.0	34.0	30.0	70.0	36.0	34.0	30.0
2003	35.0	37.0	29.0	48.0	34.0	30.0	79.0	36.0	34.0	30.0
2004	30.4	33.9	35.3	36.7	76.6	28.6	42.1	34.4	30.1	35.5

Source: ONS Crown copyright / LINC – Local Intelligence Network Cornwall

Business Registrations and De-registrations

STOCK OF VAT REGISTERED BUSINESSES Cornwall & Isles of Scilly (1995- 2002)				
Year	De-registrations	Registrations	Net Change	Stock
1995	1,590	1,125	-465	17,430
1996	1,360	1,205	-155	17,275
1997	1,290	1,450	+160	17,430
1998	1,280	1,320	+40	17,465
1999	1,325	1,365	+40	17,510
2000	1,355	1,400	+45	17,560
2001	1,260	1,325	+65	17,610
2002	1,330	1,395	+65	17,685
2003	1,445	1,590	140	18,325
2004	1,585	1,460	-125	18,470
2005				18,345

Source: VAT Registrations and stocks/ VAT registrations & de-registrations by industry 1995 to 2002 (ONS © NOMIS) - Socio-Economic Stats for Cornwall, Research and Information, Cornwall County Council

VAT REGISTERED STOCK BY DISTRICT (1998-2004)						
Area	**1998**	**2000**	**2003**	**2004**	**2005**	**% change (1998- 2004)**
Isles of Scilly	155	155	165	165	165	**6.5%**
Penwith	1,990	2,090	2,185	2,230	2,210	**11.1%**
Kerrier	2,690	2,750	2780	2,785	2,735	**0.6%**
Carrick	3,145	3170	3280	3,300	3,305	**4.8%**
Restormel	2,805	2,850	2,985	3,035	3,010	**6.2%**
North Cornwall	3,895	3,940	3,990	4,055	4,025	**2.4%**
Caradon	2,865	2,830	2875	2,905	2,895	**-0.2%**
Cornwall & Isles of Scilly	17,545	17,785	18,260	18,470	18,345	**3.7%**

Source: VAT Registrations and stocks/ VAT registrations & de-registrations by industry 1995 to 2002 (ONS © NOMIS) / Socio-Economic Stats for Cornwall, Research and Information, Cornwall County Council

STOCK AT THE END OF THE YEAR: The number of enterprises registered for VAT at the end of the year. This is an indicator of the size of the business population. Since over 99 per cent of registered enterprises employ fewer than 50 people, it is also an indicator of the stock of small businesses population.

VAT REGISTERED STOCK BY AREA (1998-2003)			
Year	**Cornwall & Isles of Scilly**	**South West**	**Great Britain**
1998	17545	161400	1663205
2000	17785	164815	1710770
2003	18255	169050	1752780
% Change (1998-2003)	4.1	4.7	5.4

Source: VAT Registrations and stocks/ VAT registrations & de-registrations by industry 1995 to 2002 (ONS © NOMIS) - Socio-Economic Stats for Cornwall, Research and Information, Cornwall County Council

NUMBER OF VAT REGISTERED BUSINESSES BY AREA (1994- 2003)					
Year		**Cornwall & Isles of Scilly**	**South West**	**England**	**UK**
VAT Stock	**1994**	18,255	156,680	1,378,380	1,632,775
	1995	17,895	155,350	1,374,275	1,626,955
	1996	17,430	154,130	1,377,300	1,629,165
	1997	17,275	155,190	1,393,070	1,645,540
	1998	17,430	158,095	1,426,265	1,681,335
	1999	17,470	160,725	1,458,720	1,715,395
	2000	17,510	162,350	1,479,900	1,736,360
	2001	17,555	163,410	1,498,425	1,754,915
	2002	17,610	163,795	1,505,575	1,762,355
	2003	17,685	163,465	1,505,495	1,762,110
% Change (1994- 2003)		**-3.1**	**+4.3**	**+9.2**	**+7.9**
% Change (2000- 2003)		**+1.0**	**+0.7**	**+1.7**	**+1.5**

Source: VAT Registrations and stocks/ VAT registrations & de-registrations by industry 1994 to 2002 (ONS © NOMIS) - Socio-Economic Stats for Cornwall, Research and Information, Cornwall County Council

New Vat Registered Business by Area (1999 – 2004)			
Year	**Cornwall & Isles of Scilly**	**South West**	**United Kingdom**
1999	1,370	15,285	176,615
2000	1,405	15,340	178,590
2001	1,330	14,350	169,250
2002	1,450	15,445	176,150
2003	1,590	16,380	189,115
2004	1,460	15,310	181,415
% change (1999-2004)	**6.6**	**0.2**	**2.7**

Source: VAT Registrations and stocks/ VAT registrations & de-registrations by industry 1996 to 2002 (ONS © NOMIS)
- Socio-Economic Stats for Cornwall, Research and Information, Cornwall County Council

Business VAT Registrations, 2003			
AREA	**Businesses registered for VAT, 2003**		**Stock of businesses - end 2003 ('000s)**
	Registration rates[1] (%)	**Deregistration rates[1] (%)**	
UNITED KINGDOM	10.5	9.6	1810.5
SOUTH WEST	9.6	8.8	169.1
Bath & NE Somerset	9.3	8.6	6.0
Bournemouth	12.0	11.6	4.8
Bristol	11.0	10.9	11.5
North Somerset	10.3	9.6	5.8
Plymouth	11.6	9.6	4.0
Poole	11.0	9.8	4.3
S. Gloucestershire	10.6	9.6	6.8
Swindon	11.5	9.8	4.3
Torbay	11.8	10.0	3.3
Cornwall & Isles of Scilly	8.6	8.1	18.3
Caradon	9.3	8.4	3.3
Carrick	8.5	8.7	2.9
Kerrier	8.6	8.5	2.8
North Cornwall	7.6	7.8	4.0
Penwith	8.9	8.2	2.2
Restormel	9.0	7.5	3.0
Isles of Scilly	9.1	3.0	0.2
Devon	8.8	7.6	29.0
East Devon	9.0	8.1	4.7
Exeter	11.4	8.5	3.0
Mid Devon	7.7	6.4	3.6
North Devon	9.0	7.5	4.0
South Hams	8.3	7.3	3.9
Teignbridge	10.0	9.0	4.3
Torridge	6.3	7.2	2.8
West Devon	7.5	6.4	2.6
Dorset	9.3	8.1	14.6
Christchurch	10.8	9.1	1.4
East Dorset	9.9	8.0	3.4
North Dorset	7.6	7.6	2.7

Purbeck	9.5	8.5	1.6
West Dorset	8.1	7.5	4.1
Weymouth & Portland	12.5	9.9	1.3
Gloucestershire	9.4	8.8	21.4
Cheltenham	11.1	11.1	3.6
Cotswold	9.2	7.4	4.7
Forest of Dean	8.5	7.2	3.1
Gloucester	10.4	11.4	2.5
Stroud	9.3	8.0	4.5
Tewkesbury	8.2	8.5	2.8
Somerset	8.4	8.4	18.8
Mendip	8.5	8.5	4.3
Sedgemoor	9.0	8.5	3.8
South Somerset	8.0	8.2	5.6
Taunton Deane	8.8	9.1	3.5
West Somerset	7.2	6.9	1.5
Wiltshire	9.7	8.7	16.2
Kennet	10.4	8.1	3.2
North Wiltshire	9.9	8.0	5.1
Salisbury	8.8	9.8	4.1
West Wiltshire	9.8	9.2	3.8

Source: Small Business Service, DTI
[1]Registration/de-registration during 2003 as a percentage of the stock at the end of 2003

Classification of VAT-registered Enterprises by Broad Industry Group[1], 2004 (% and '000s) Part 1

	Agriculture	Production	Construction	Distribution, Hotels & Catering; Repairs	Transport & Communication
UNITED KINGDOM	8.5	8.7	11.3	28.9	4.6
SOUTH WEST	13.4	8.1	12.5	28.6	3.9
Bath & NE Somerset	5.4	8.2	10.7	27.5	3.8
Bournemouth	0.5	6.6	15.4	34.0	2.7
Bristol	0.3	7.8	10.0	29.8	3.8
N. Somerset	6.3	7.8	12.8	28.9	4.8
Plymouth	1.6	8.7	14.5	38.1	4.8
Poole	1.2	12.3	14.8	28.5	3.7
S. Gloucestershire	6.7	8.0	16.8	25.3	6.3
Swindon	2.9	8.0	15.0	25.9	4.6
Torbay	3.0	6.6	14.8	43.9	3.5
Cornwall & Isles of Scilly	22.6	7.0	12.0	32.9	3.2
Devon	24.7	7.3	11.4	27.5	3.5
Dorset	14.0	9.3	13.9	28.5	3.5
Gloucestershire	10.3	9.2	11.5	26.4	4.2
Somerset	18.7	8.5	12.7	27.7	4.5
Wiltshire	12.3	8.1	12.4	24.8	3.9

Source: Inter-Departmental Business Register, ONS
[1]Based on SIC 2003

Classification of VAT-registered Enterprises by Broad Industry Group[1], 2004 (% and '000s) Part 2				
	Finance, Property & Business Services	Education & Health	Public admin & other services	Total VAT registered enterprises ('000s)
UNITED KINGDOM	28.2	1.2	8.5	1,611.5
SOUTH WEST	24.7	1.3	7.4	152.1
Bath & NE Somerset	34.2	1.6	8.7	5.4
Bournemouth	31.8	1.4	7.7	4.2
Bristol	37.5	1.4	9.2	10.1
N. Somerset	30.5	1.5	7.3	5.2
Plymouth	22.8	1.3	8.3	3.5
Poole	30.6	1.3	7.9	3.8
S. Gloucestershire	28.9	1.4	6.6	6.1
Swindon	32.3	1.3	10.1	3.8
Torbay	19.1	1.4	7.8	2.9
Cornwall & Isles of Scilly	14.6	0.9	6.8	16.6
Devon	18.2	1.1	6.4	26.5
Dorset	21.8	1.4	7.7	13.2
Gloucestershire	29.7	1.4	7.4	19.4
Somerset	20.4	1.3	6.2	17.0
Wiltshire	28.6	1.4	8.6	14.5

Source: Inter-Departmental Business Register, ONS
[1]Based on SIC 2003

NUMBER OF VAT REGISTERED BUSINESSES BY SECTOR (1996 & 2003)							
Industrial Sector	Cornwall & Isles of Scilly				South West	England	United Kingdom
	1996	2000	2003	% Change (1996-2003)	% Change (1996-2003)	% Change (1996-2003)	% Change (1996-2003)
Agriculture	4,540	4,085	3,935	**-13.3**	**-11.8**	**-12.1**	**-11.2**
Mining and quarrying	30	30	30	**0.0**	**+17.1**	**-5.7**	**-6.4**
Manufacturing	1,255	1,240	1,210	**-3.6**	**-4.0**	**-7.0**	**-6.7**
Construction	1,895	1,965	2,025	**+6.9**	**+41.2**	**+4.8**	**+4.4**
Wholesale/ retail	4,190	3,975	3,870	**-7.6**	**-8.0**	**-7.6**	**-8.1**
Hotels/ catering	1,740	1,845	1,950	**+12.1**	**+9.0**	**+11.6**	**+10.3**
Transport	510	545	575	**+12.7**	**+7.0**	**+9.8**	**+9.3**
Finance	35	35	30	**-14.3**	**10.8**	**3.9**	**3.7**
Business Services	1,910	2,475	2,595	**+35.9**	**+42.3**	**+43.9**	**+43.5**
Public Administration	1,035	1,140	1,225	**+18.4**	**+9.4**	**+12.1**	**+12.0**
Education and health	290	225	240	***-17.2***	***-8.8***	***+5.8***	***+5.5***
Total	17,430	17,560	17,658	***+1.3***	***+6.1***	***+9.3***	***+8.2***

Source: VAT Registrations and stocks/ VAT registrations & de-registrations by industry 1996 to 2003 (ONS © NOMIS)
Census/Population statistics (ONS) – Socio-Economic Stats for Cornwall, Research and Information, Cornwall County Council

VAT-REGISTERED ENTERPRISES BY EMPLOYEE SIZE BAND, 2004						
	Percentage of enterprises by employee size band					Total of VAT registered enterprises ('000s)
	1-9	10-19	20-49	50-249	250 +	
United Kingdom	88.1	6.3	3.5	1.7	0.5	1,607.7
South West	89.3	5.9	3.0	1.4	0.4	151.8
Cornwall & Isles of Scilly	90.1	5.8	2.9	1.0	0.2	16.6

Source: Inter-Departmental Business Register, ONS
Socio-Economic Stats for Cornwall, Research and Information, Cornwall County Council

VAT-REGISTERED ENTERPRISES BY TURNOVER SIZE BAND, 2004								
	Percentage of business sites by turnover size (bands in £ thousand)							Total VAT registered enterprises (000s)
	0-49	50-99	100-249	250-499	500-999	1,000-4,999	5,000+	
United Kingdom	19.9	24.5	25.9	12.3	7.7	7.4	2.4	1,611.5
South West	22.5	25.3	26.1	11.9	6.8	5.8	1.6	152.1
Cornwall & Isles of Scilly	25.5	25.3	25.9	11.6	6.4	4.4	0.9	16.9

Source: Inter-Departmental Business Register, ONS
Socio-Economic Stats for Cornwall, Research and Information, Cornwall County Council

Businesses in Cornwall

- Cornwall has 19,434 businesses (2002)
- 67% employ less than 5 people (2002)
- 0.4% employ 200 or more people (2002)
- 88% of businesses have a turnover less than £500,000
- Between 1994 and 2001 Cornwall gained 2.3% of VAT registered businesses. (SW grew by 8.9%)
- 40% of all businesses located in Truro, CPR and Falmouth/Penryn (Cornwall Towns Study)

- **Economic Inactivity**

Economic Inactivity – March 2003 – February 2004				
	United Kingdom		Cornwall and Isles of Scilly	
Selected Categories:	**Number**	**Percentage**	**Number**	**Percentage**
Economically inactive, reason: **long term sick**	640,000	8%	10,000	16%
Economically inactive, **want a job**	2,058,000	26%	24,000	37%

Source: Local Area Labour Force Survey ONS @ Crown Copyright

Economically inactive refers to those people who are **not looking, or not available, for work**. This applies mainly to students and people looking after the family and home in the first instance, and those who are long-term sick or disabled in the second instance.

In Cornwall, the proportion of the working age population who are economically inactive is the same as nationally – 22%, equating to 65,000 people locally. However, it is who make up the economically inactive that demonstrates Cornwall's problem.

Labour Force, September 2003 to May 2005[1,2] (% & '000s)				
	ILO Unemployed			
AREA	**Q1**	**Q2**	**Q3**	**Q4**
GREAT BRITAIN	4.9	4.9	4.7	4.7
SOUTH WEST	3.3	3.2	3.4	3.4
Bath & NE Somerset	2.3	2.3	3.3	2.2
Bournemouth	3.8	3.8	5.5	5.5
Bristol	4.3	4.3	4.1	4.5
N. Somerset	2.0	2.0	3.1	3.1
Plymouth	3.4	4.3	4.3	5.2
Poole	2.8	1.4	3.0	3.1
S. Gloucestershire	2.3	1.6	2.3	2.9
Swindon	4.8	5.8	2.9	2.8
Torbay	5.1	6.7	3.4	3.4
Cornwall & Isles of Scilly	4.2	4.5	4.4	3.7
Devon	3.2	2.9	3.2	2.9
Dorset	2.7	2.1	2.5	2.5
Gloucestershire	3.2	3.1	3.7	3.7
Somerset	2.3	1.9	2.6	3.4
Wiltshire	3.0	3.1	3.5	3.4

[1]Based on the economically active population aged 16+ in private households, student halls of residence and NHS accommodation
[2]Q1 to 4 represent four quarter averages for Sep 03 - Aug 04, Dec 03 - Nov 04, Mar 03 - Feb 04 and Jun 04 to May 05, respectively; and are consistent with 2001 Census data

Table 17: Claimant Count[1], June

	1999	2000	2001	2002	2003	2004	2005
UNITED KINGDOM	3.5	3.0	2.6	2.6	2.6	2.3	2.3
SOUTH WEST	2.5	2.0	1.7	1.6	1.6	1.3	1.4
Cornwall & Isles of Scilly	3.7	3.0	2.3	2.1	1.9	1.6	1.6
Caradon	2.6	2.1	1.7	1.6	1.5	1.3	1.2
Carrick	4.0	3.6	2.4	2.1	2.2	1.5	1.9
Kerrier	4.2	3.6	2.6	2.5	2.3	1.7	1.7
North Cornwall	3.2	2.4	2.0	1.8	1.8	1.5	1.4
Penwith	5.0	4.0	3.1	2.8	2.4	1.9	1.9
Restormel	3.8	2.8	2.2	1.8	1.7	1.6	1.8
Isles of Scilly	0.4	0.6	0.3	0.3	0.4	0.2	0.2

[1]No. of people claiming job seeker's allowance as a proportion of the resident working age population.
Source: Nomisweb, ONS - (SW Regional Development Agency Sub-regional indicators July 2005)

Table 18: Income Support Claimants[1]

	Income support claimants as % of population							
	2003			2004				2005
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
GREAT BRITAIN	8.6	8.6	4.7	6.2	6.1	6.1	6.0	6.0
SOUTH WEST	6.8	6.9	3.5	4.7	4.6	4.6	4.6	4.6
Cornwall & Isles of Scilly	7.7	7.8	3.6	5.1	4.9	4.9	4.8	4.8
Caradon	6.3	6.5	2.7	4.0	3.7	3.5	3.7	3.5
Carrick	6.8	6.8	2.8	4.0	3.8	4.4	4.4	4.2
Kerrier	8.4	8.7	4.1	5.7	5.7	5.5	5.2	5.3
North Cornwall	7.4	7.5	3.2	4.4	4.4	4.4	4.4	4.4
Penwith	10.1	10.2	4.9	7.9	7.3	7.0	7.3	7.3
Restormel	7.6	7.4	4.0	5.1	5.0	4.6	4.6	5.0
Isles of Scilly	5.9	#	#	#	#	#	#	#

[1]Pensioners were removed from income support in autumn 2003. 2003 Q1 to Q3 rates are calculated as a proportion of the 2003 population aged 16+. From 2003 Q4, rates are calculated as a proportion of the 2003 working age population.
Source: Department for Work and Pensions; Mid-year Population Estimates, ONS – (SW Regional Development Agency Sub-regional indicators July 2005)

Table 19: Index of Multiple Deprivation 2004 - Local Authority Data[1]

	Rank of Average SOA Score[2]	Rank of Average SOA Rank[2]	Rank of Extent[3]	Rank of Concentration[4]	Rank of Income Scale[5]	Rank of Employment Scale[5]
Caradon	157	136	219	214	230	227
Carrick	149	132	174	172	181	186
Kerrier	87	63	119	114	136	141
North Cornwall	106	76	190	184	211	206
Penwith	56	34	81	89	178	182
Restormel	93	72	137	144	150	154
Isles of Scilly	199	162	298	338	354	354

[1]IMD 2004 data are produced at lower level Super Output Area geography (~1500 people per SOA). This table represents a district level summary of the small geography data. Ranks are out of 354 local authorities with 1 being most deprived.
[2]Population weighted average of the combined ranks and scores for SOAs in England. [3]Proportion of a district's population living in the 10% most deprived SOAs in England. [4]Population weighted average of the ranks of a district's most deprived SOAs that contain 10% of the district's population. [5]Rank of numbers of people who are income and employment deprived (not population weighted).
Source: ODPM – (SW Regional Development Agency Sub-regional indicators July 2005)

- **Population Growth**

RECENT POPULATION GROWTH IN CORNWALL	
Period	**Growth in Population**
1971-1976	30,100
1976 – 1981	14,600
1981- 1986	24,100
1986 - 1991	21,000
1991 - 1996	9,600
1996 - 2001	20,800
2001 – 2003 (only a two year period)	11,400
2001 – 2005 (information to be added)	

Migration Statistics from the Census Conference – Crewe – 20th June 2005

THE POPULATION OF TOP TEN URBAN AREAS				
Rank 2001	**Urban Areas**	**1991**	**2001**	**Change**
1	**Camborne – Redruth**	35,900	39,900	+4,000
2	**Falmouth – Penryn**	27,300	28,800	+1,500
3	**St Austell**	21,600	22,700	+1,100
4	**Truro**	19,000	20,900	+1,900
5	**Penzance**	19,700	20,300	+600
6	**Newquay**	17,400	19,600	+2,200
7	**Saltash**	14,100	14,100	-
8	**Bodmin**	12,600	12,800	+200
9	**Helston**	8,500	10,600	+2,100
10	**St Ives**	10,100	9,900	-200

Source: ONS Census 1991-2001

Settlements and Population: Key Points

- Extremely rural nature of Cornwall
- Lack of a Principal Urban Area (PUA)
- Significant population growth
- Large increase in the 75+ age group
- Significant levels of inward migration.
- Short term increase in 16 – 29 age group. If continues, could have a significant impact.
- Disperse nature of settlements means:
- difficult to provide frequent public transport
- access to key services challenging.

Population: Predicted Growth in Cornwall 2001 to 2008		
Year	**Growth in Population**	**Total Population**
1971 - 1981	44,700	424,400
1981 – 1991	45,100	469,500
1991 – 2001	30,500	500,00
2001 – 2004	15,300	515,300
Year	**Projected Growth in Population**	**Total Projected Population**
2001 – 2013	57,000	564,000
2013 – 2028	64,000	621,000

Source: ONS Population Projections

Population: Predicted Change in Age Profiles 1971 - 2028			
Age	**1971 – 2001**	**2001 – 2028**	**1971 - 2028**
0 – 14	7%	4%	12%
15 – 24	7%	13%	20%
25 – 44	44%	4%	50%
45 – 64	40%	22%	71%
65 – 74	20%	63%	96%
75 +	103%	92%	209%
All Ages	32%	24%	64%

Source: ONS Population Projections

Population: Some Key Changes				
	0-14	**15-64**	**All Ages**	**15-64%**
1971	80,400	231,900	379,200	61%
2001	86,200	312,500	499,000	63%
2028	89,800	353,800	621,000	57%

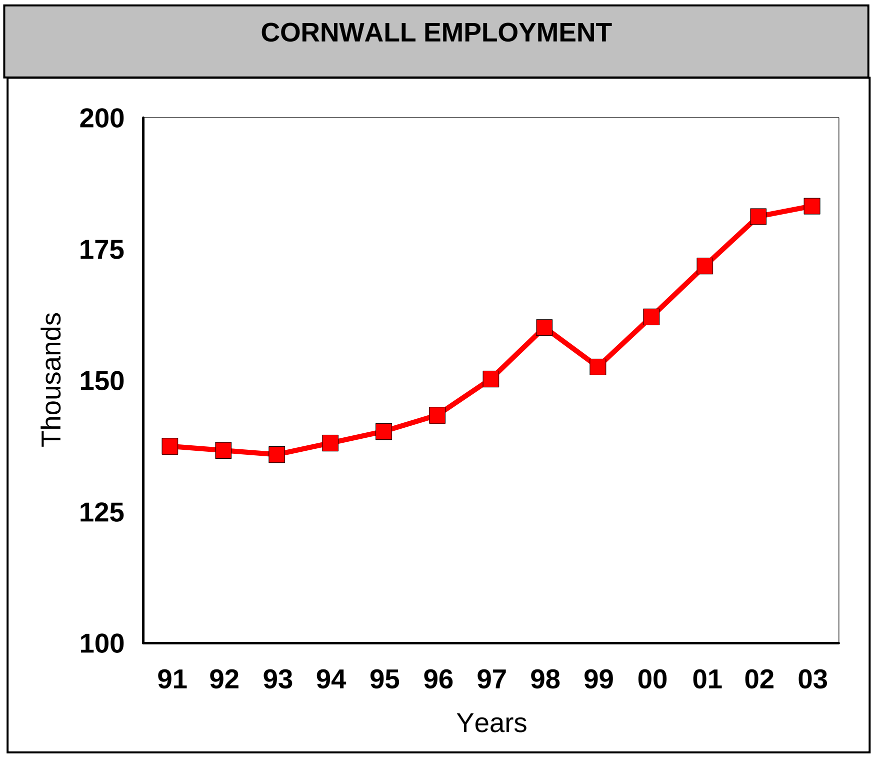
Source: ONS Population Projects

Projected Fall in Average Household Size in Cornwall	
2001	**2.28**
2011	**2.17**
2021	**2.08**

Source: ONS Population Projects

Projected Change in Households by Type Cornwall 2001-2021	
Married Couples	- 1,000
Cohabiting Couples	+ 9,000
Lone Parents	+ 1,000
Other Multi Person Households	+ 9,000
One Person Households	+ 24,000
All Households	+ 42,000

Source: ONS Population Projections



Source: Annual Business Enquiry, ONS Crown Copyright / Owen Nankivell

- **Population Change**

POPULATION CHANGE CORNWALL AND SCILLY 1991 - 2001			
Age Band	**1991 Population**	**2001 Population**	**% Change**
0-4	27,800	26,200	-6
5-15	61,300	66,400	8
16-19	24,100	22,700	-6
20-29	57,000	47,500	-17
30-44	94,700	98,500	4
45-64	111,400	139,200	25
65-74	50,700	51,800	2
75-84	32,300	35,800	11
85+	9,000	13,200	46

Source: Census 1999 and 2001 / Migration Statistics from the Census Conference – Crewe – 20th June 2005

RESIDENT POPULATION BY DISTRICT (1981 – 2001)				
Area	**Year**			**% Change (1981-2001)**
	1981	**1991**	**2001**	
Isles of Scilly	1,120	1,149	1,269	13.3
Penwith	53,172	59,534	63,012	12.0
Kerrier	81,702	86,627	92,517	6.0
Carrick	73,989	83,020	87,865	12.2
Restormel	76,781	88,595	95,562	15.4
Caradon	67,038	76,024	79,649	13.4
North Cornwall	64,096	74,174	80,509	15.7
Cornwall & Isles of Scilly	418,631	470,912	501,267	12.5

Source: Census/Population statistics (ONS) – Socio-Economic Stats for Cornwall, Research and Information, Cornwall County Council

RESIDENT POPULATION BY GENDER AND DISTRICT (2003)			
Area	**Male**	**Female**	**Total**
Penwith	31,100	32,900	64,000
Kerrier	46,700	48,400	95,600
Carrick	42,600	46,400	89,300
Restormel	45,700	51,400	96,100
Caradon	39,300	41,600	81,100
North Cornwall	40,000	42,700	83,100
Cornwall & Isles of Scilly	245,400	263,400	511,500

Source: Mid-year population estimates 2003 (ONS) / Socio-Economic Stats for Cornwall, Research and Information, Cornwall County Council

WORKING AGE RESIDENT POPULATION BY AGE GROUP & GENDER (1981-2001) Cornwall & Isles of Scilly											
Year	**Males**										
	16-19	**20-24**	**25-29**	**30-34**	**35-39**	**40-44**	**45-49**	**50-54**	**55-59**	**60-64**	**Total**
1981	13,852	12,690	11,772	14,900	13,692	11,750	11,450	11,698	11,986	11,092	111,030
1991	12,261	14,164	14,354	14,393	14,200	17,591	15,499	13,191	12,695	13,126	129,213
2001	11,677	11,541	12,404	14,856	16,990	16,153	15,561	20,019	17,639	14,927	140,090
Change 1981 – 2001	-2,175	-1,149	+632	-44	+3,298	+4,403	+4,111	+8,321	+5,653	+3,835	+29,060
Change 1991 – 2001	-584	-2,623	-1,950	+463	+2,790	-1,438	+62	+6,828	+4,944	+1,801	+10,877
	Females										
	16-19	**20-24**	**25-29**	**30-34**	**35-39**	**40-44**	**45-49**	**50-54**	**55-59**	**60-64**	**Total**
1981	11,789	12,117	12,292	15,378	13,842	11,738	11,493	12,325	13,525	N/A	102,710
1991	11,886	14,019	14,488	14,960	15,198	18,316	15,885	13,432	13,181	N/A	119,479
2001	10,994	10,869	12,687	16,253	17,402	16,884	16,747	20,914	18,239	N/A	129,995
Change 1981 – 2001	-795	-1,248	+395	+875	+3,560	+5,146	+5,254	+8,589	+4,714	N/A	+27,285
Change 1991 – 2001	-892	-3,150	-1,801	+1,293	+2,204	-1,432	+862	+7,482	+5,058	N/A	+10,516

Source: Census/Population statistics (ONS) – Socio-Economic Stats for Cornwall, Research and Information, Cornwall County Council

MIGRATION 1997 - 2004			
Cornwall & Isles of Scilly	**000's**	**000's**	**000's**
	Persons In	**Persons Out**	**Net**
1997 – 98	28,100	24,500	3,700
1998 – 99	26,800	23,400	4,100
1999 – 00	28,500	23,700	4,800
2000 – 01	28,100	22,900	5,200
2001 – 02	29,900	22,500	7,400
2002 – 03	29,000	21,900	6,900
2003 - 04	22,400	15,000	7,400

Source: 2001 Census – Migration – Myths in Cornwall – Malcolm Brown – Cornwall County Council

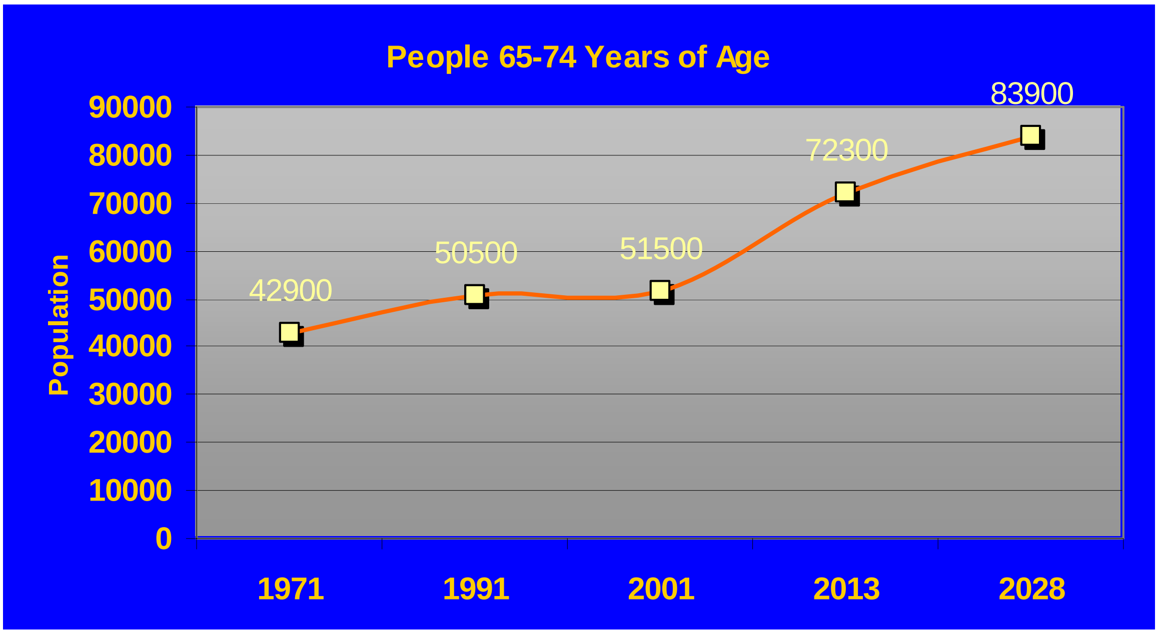
Growth Issues for the Future

- 51,000 – 65,000 new dwellings 2001 – 2026
- Scope to influence level and distribution
- Affordable Housing
- Jobs and the economy
- New migration trends likely to continue

2001 Census - Theme Tables - Work from Home Data			
	England and Wales 2003	**South West 2003**	**Cornwall and Isles of Scilly 2003**
ALL PEOPLE	2,170,547	251,408	29,908
Aged 16	6,064	639	77
Aged 17	9,231	909	97
Aged 18	11,022	1,120	138
Aged 19	13,289	1,319	130
Aged 20 to 22	47,139	4,426	489
Aged 23 to 24	37,681	3,423	344
Aged 25 to 29	145,449	13,670	1,399
Aged 30 to 34	227,520	22,326	2,294
Aged 35 to 39	288,021	30,629	3,127
Aged 40 to 44	288,487	31,998	3,642
Aged 45 to 49	275,180	32,864	3,799
Aged 50 to 54	311,489	39,101	5,175
Aged 55 to 59	253,182	33,677	4,548
Aged 60 to 64	154,571	20,786	2,715
Aged 65 to 74	102,222	14,521	1,934

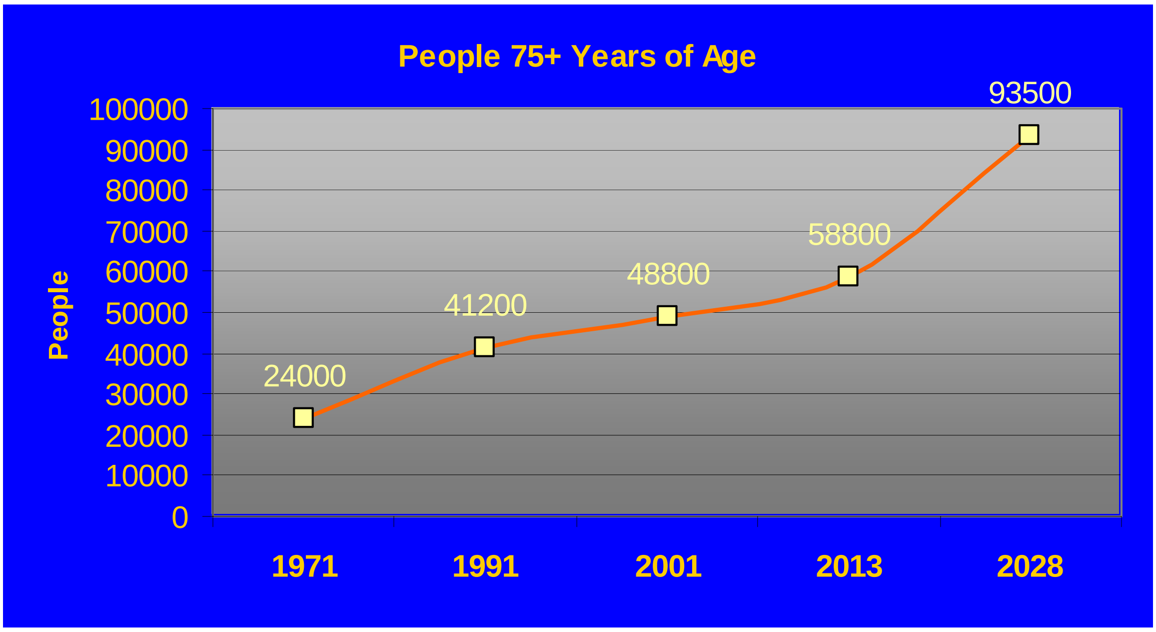
Source: ONS Crown Copyright Reserved [from Nomis on 23 November 2005]

Population: People 65-74 years of age



Source: ONS Population Projects

Population: People 75+ years



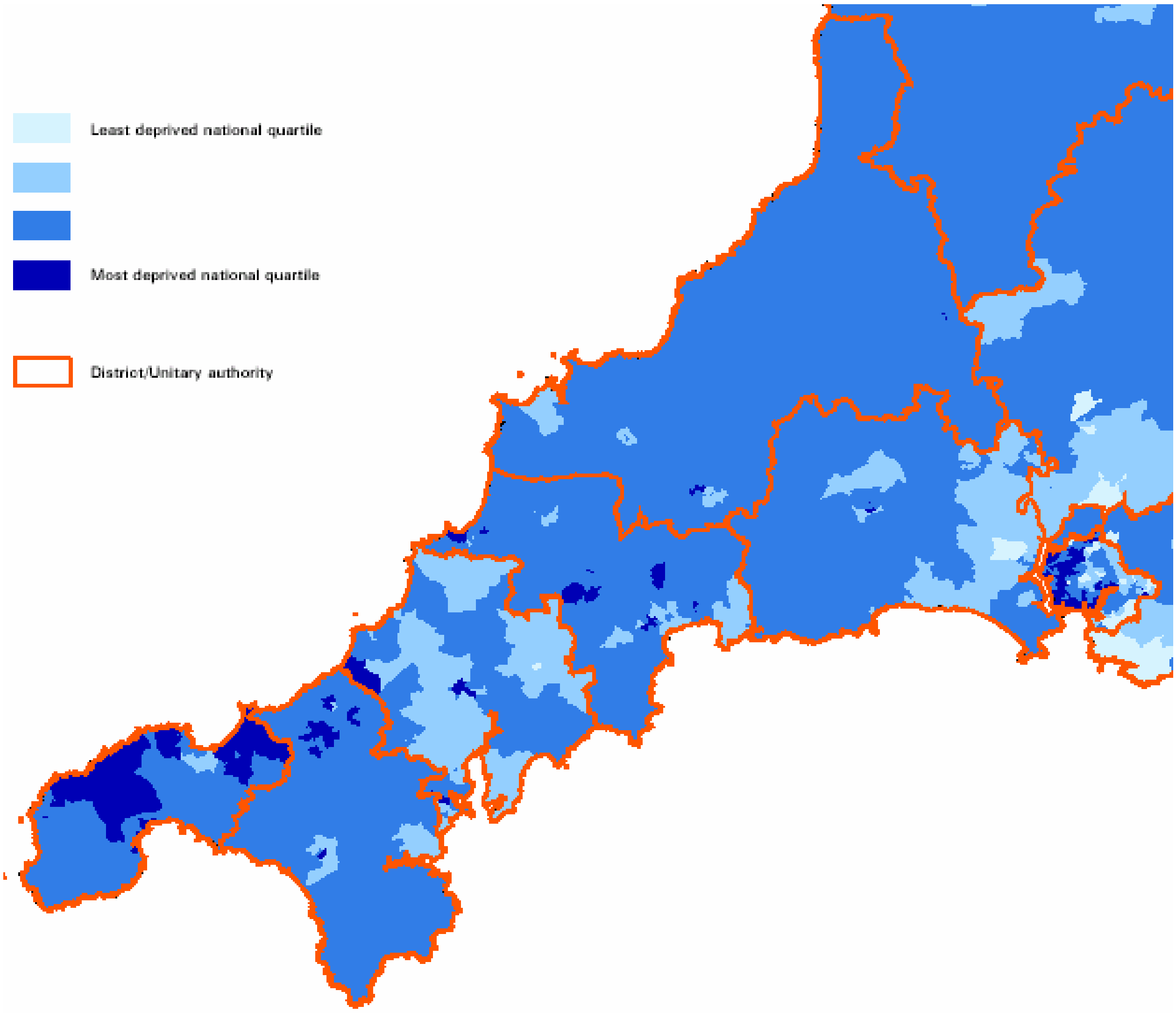
Source: ONS Population Projects

- **Indicators of Multiple Deprivation**

The concept of multiple deprivation

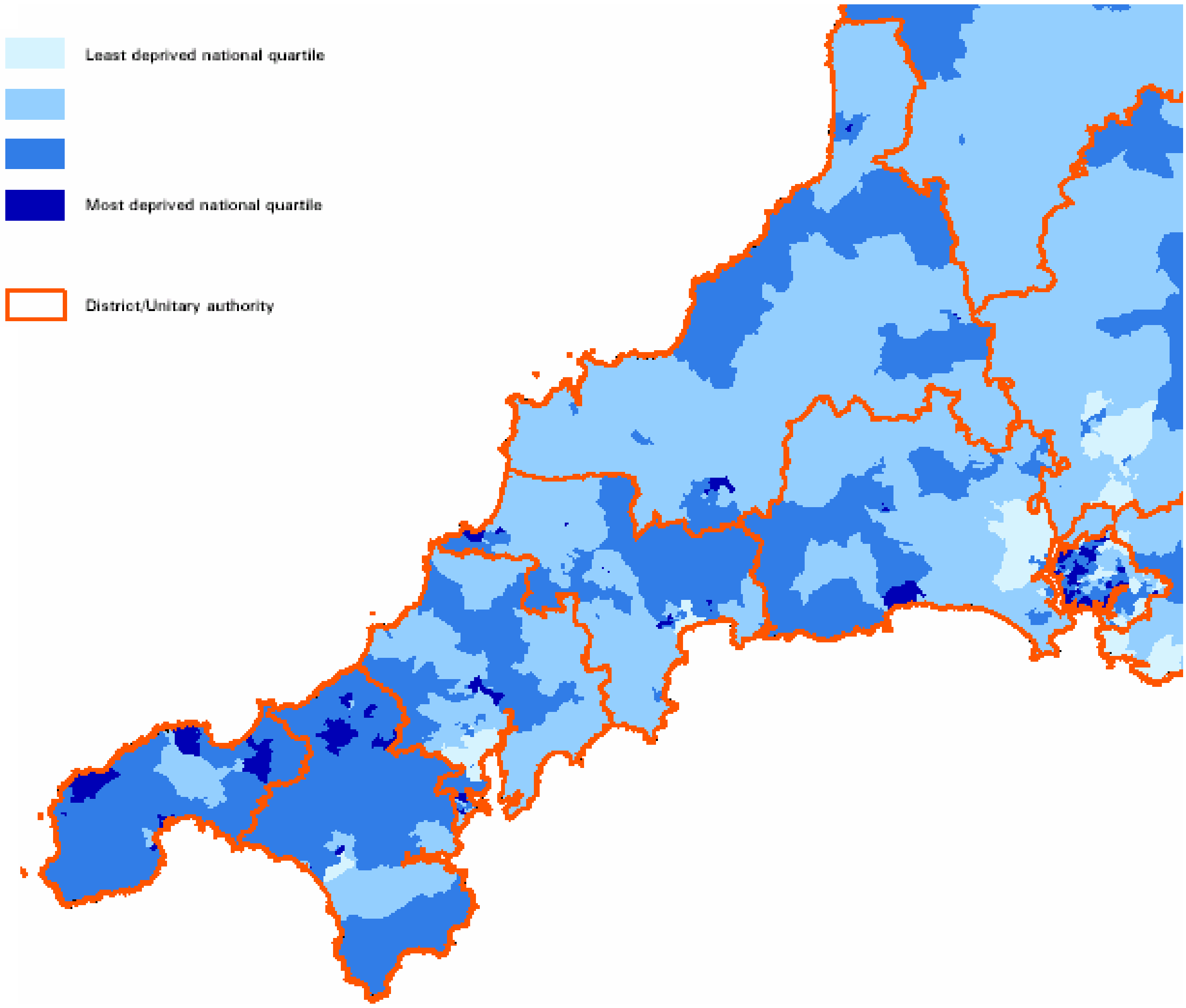
The Index of Multiple Deprivation 2004 (IMD 2004) is a measure of multiple deprivation at the small area level. The model of multiple deprivation which underpins the IMD 2004 is based on the idea of distinct dimensions of deprivation which can be recognised and measured separately. These are experienced by individuals living in an area. People may be counted in one or more of the domains, depending on the number of types of deprivation that they experience. The overall IMD is conceptualised as a weighted area level aggregation of these specific dimensions of deprivation.

Overall Domain



Source: Crown Copyright. All rights reserved. South West Observatory. 2004. 100039038. Source: Office of the Deputy Prime Minister 2004.

Income Domain



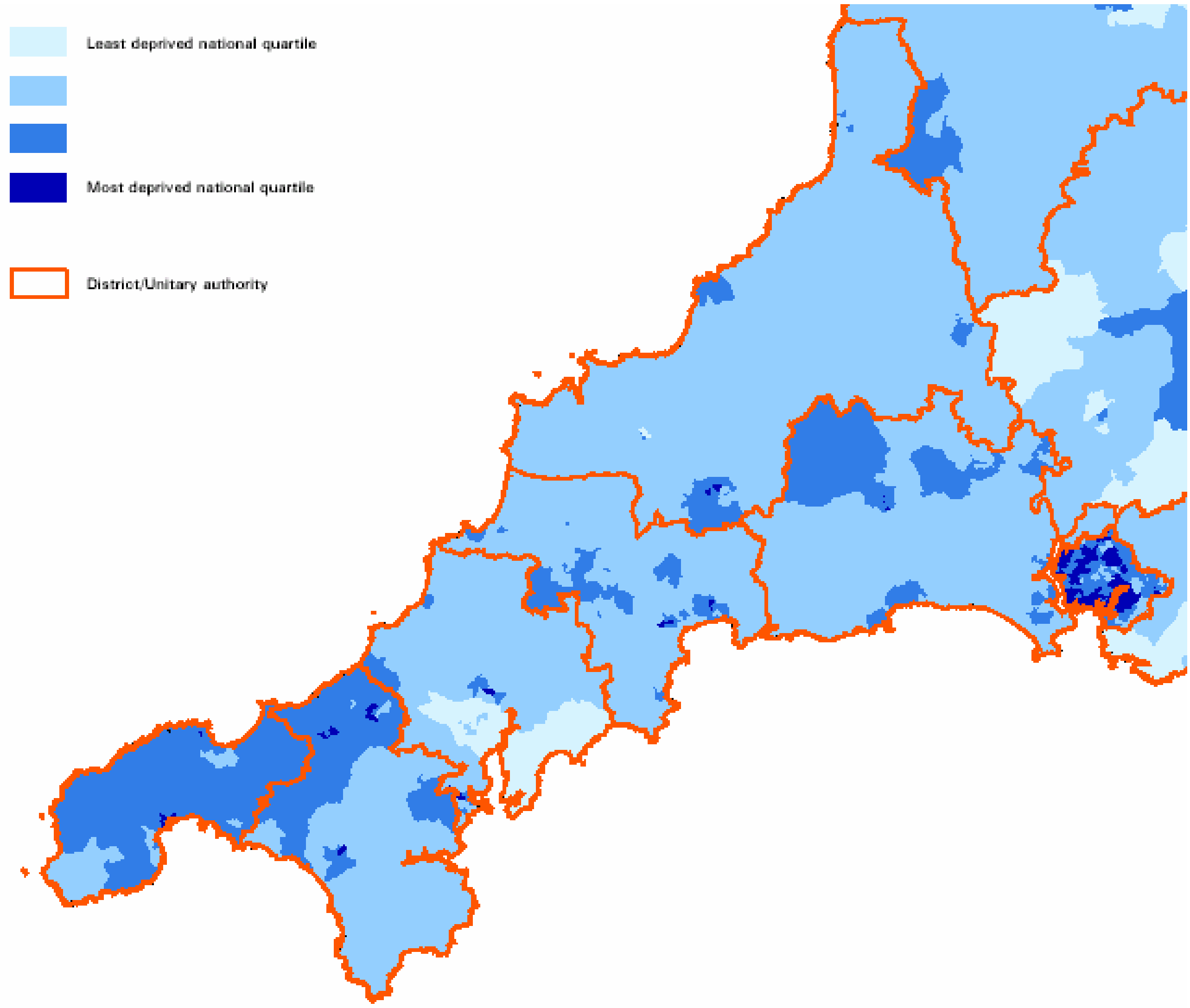
Source: Crown Copyright. All rights reserved. South West Observatory. 2004. 100039038. Source: Office of the Deputy Prime Minister 2004.

The purpose of this Domain is to capture the proportion of the population experiencing income deprivation in an area.

- Adults and children in Income Support households (2001).
- Adults and children in Income Based Job Seekers Allowance households (2001).
- Adults and children in Working Families Tax Credit households whose equivalised income (excluding housing benefits) is below 60% of median before housing costs (2001).
- Adults and children in Disabled Person's Tax Credit households whose equivalised income (excluding housing benefits) is below 60% of median before housing costs (2001).
- National Asylum Support Service supported asylum seekers in England in receipt of subsistence only and accommodation support (2002).

In addition, an Income Deprivation Affecting Children Index and an Income Deprivation Affecting Older People Index were created.

Health and Disability Domain

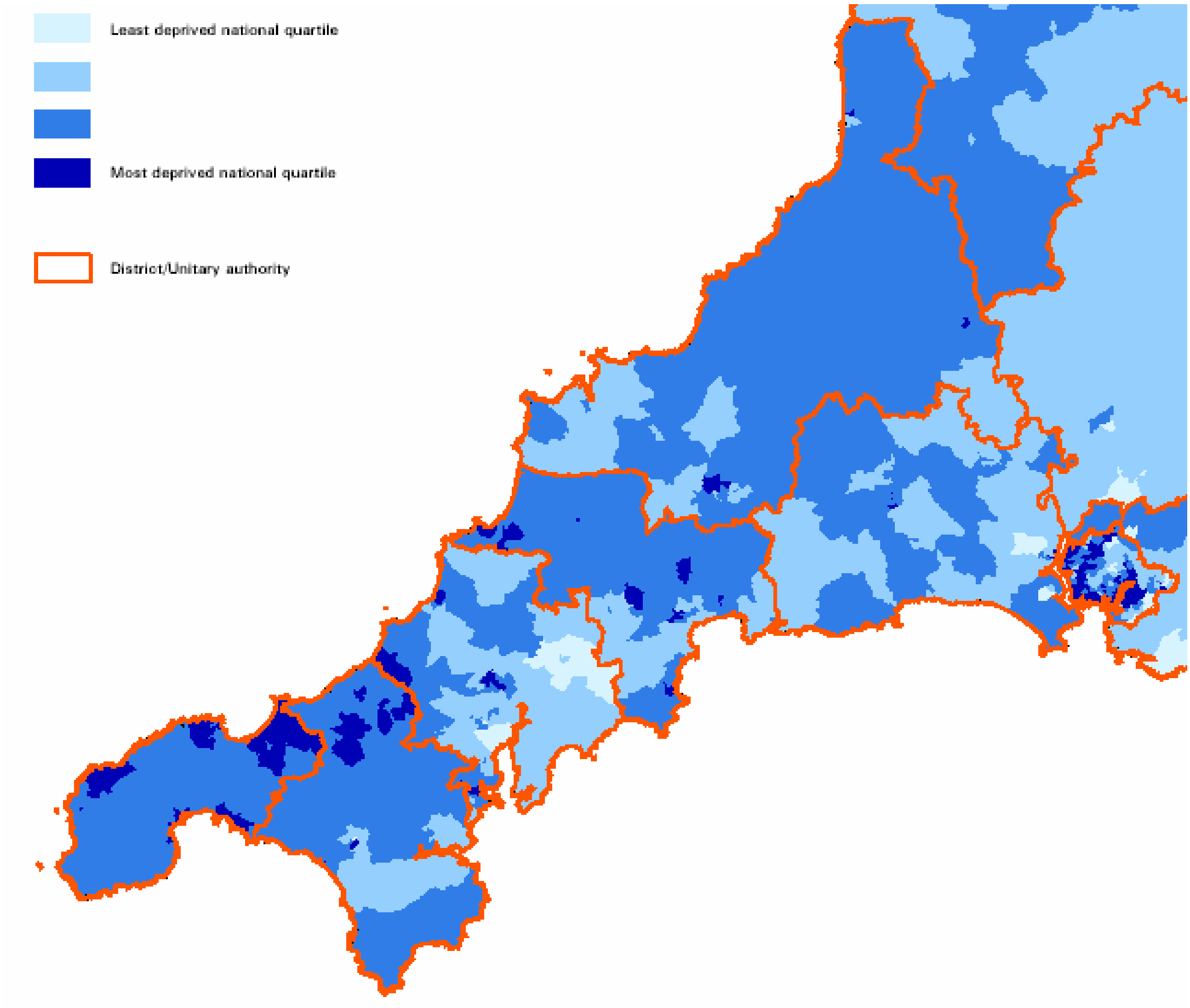


Source: Crown Copyright. All rights reserved. South West Observatory. 2004. 100039038. Source: Office of the Deputy Prime Minister 2004.

This domain identifies areas with relatively high rates of people who die prematurely or whose quality of life is impaired by poor health or who are disabled, across the whole population.

- Years of Potential Life Lost (1997-2001).
- Comparative Illness and Disability Ratio (2001).
- Measures of emergency admissions to hospital (1999-2002).
- Adults under 60 suffering from mood or anxiety disorders (1997-2002).

Employment Domain

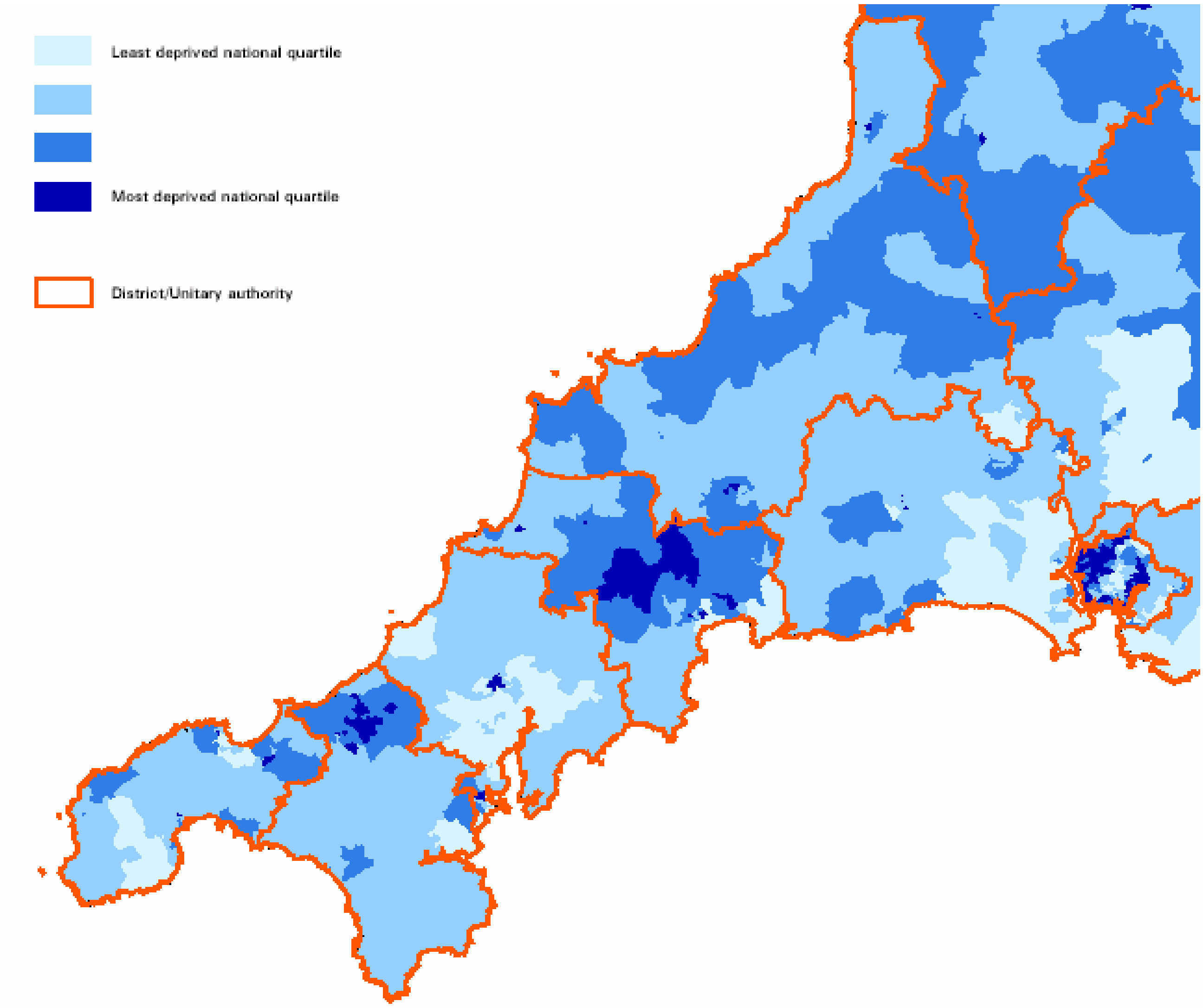


Source: Crown Copyright. All rights reserved. South West Observatory. 2004. 100039038. Source: Office of the Deputy Prime Minister 2004.

This domain measures employment deprivation conceptualised as involuntary exclusion of the working age population from the world of work.

- Unemployment claimant count (JUVOS) of women aged 18-59 and men aged 18-64 averaged over 4 quarters (2001).
- Incapacity Benefit claimants women aged 18-59 and men aged 18-64 (2001).
- Severe Disablement Allowance claimants women aged 18-59 and men aged 18-64 (2001).
- Participants in New Deal for the 18-24s who are not included in the claimant count (2001).
- Participants in New Deal for 25+ who are not included in the claimant count (2001).
- Participants in New Deal for Lone Parents aged 18 and over (2001).

Education Skills and Training



Source: Crown Copyright. All rights reserved. South West Observatory. 2004. 100039038. Source: Office of the Deputy Prime Minister 2004.

This Domain captures the extent of deprivation in terms of education, skills and training in a local area. The indicators fall into two sub domains: one relating to education deprivation for children/young people in the area and one relating to lack of skills and qualifications among the working age adult population.

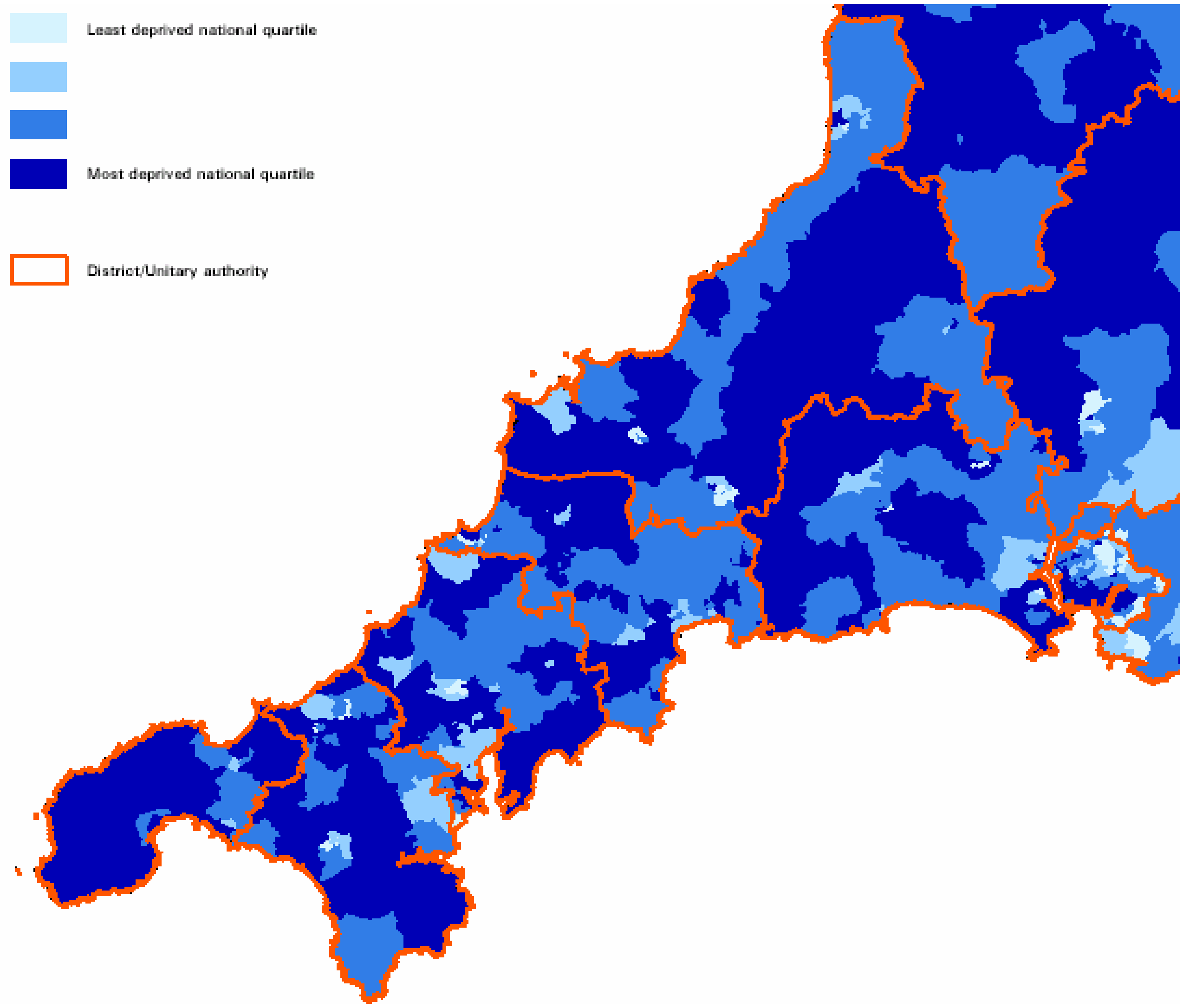
Children / Young People

- Average points score of children at Key Stage 2 (2002).
- Average points score of children at Key Stage 3 (2002).
- Average points score of children at Key Stage 4 (2002).
- Proportion of young people *not* staying on in school or school level education above 16 (2001).
- Proportion of those aged under 21 not entering Higher Education (1999-2002).
- Secondary school absence rate (2001-2002).

Skills

- Proportions of working age adults (aged 25-54) in the area with no or low qualifications (2001).

Living Environment



Source: Crown Copyright. All rights reserved. South West Observatory. 2004. 100039038. Source: Office of the Deputy Prime Minister 2004.

This Domain focuses on deprivation with respect to the characteristics of the living environment. It comprises two sub-domains: the 'indoors' living environment which measures the quality of housing and the 'outdoors' living environment which contains two measures about air quality and road traffic accidents.

The 'indoors' living environment

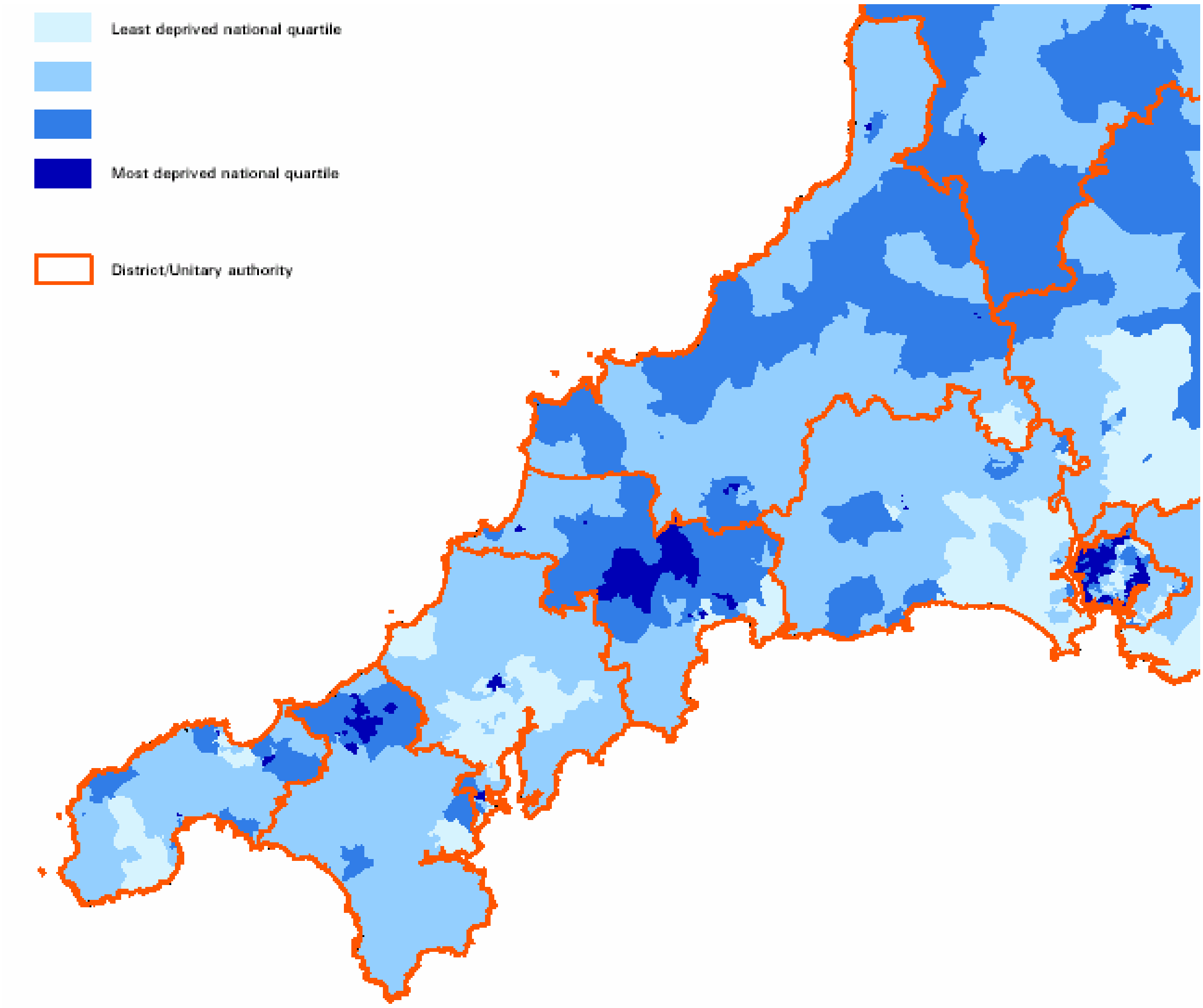
- Social and private housing in poor condition (2001).
- Houses without central heating (2001).

The 'outdoors' living environment

- Air quality (2001).
- Road traffic accidents involving injury to pedestrians and cyclists (2000-2002).

The methodological steps that were taken to create the IMD 2004 are described in the full report. The table above sets out the Domain weights which were used to combine the Domains into an Index of Multiple Deprivation.

Crime



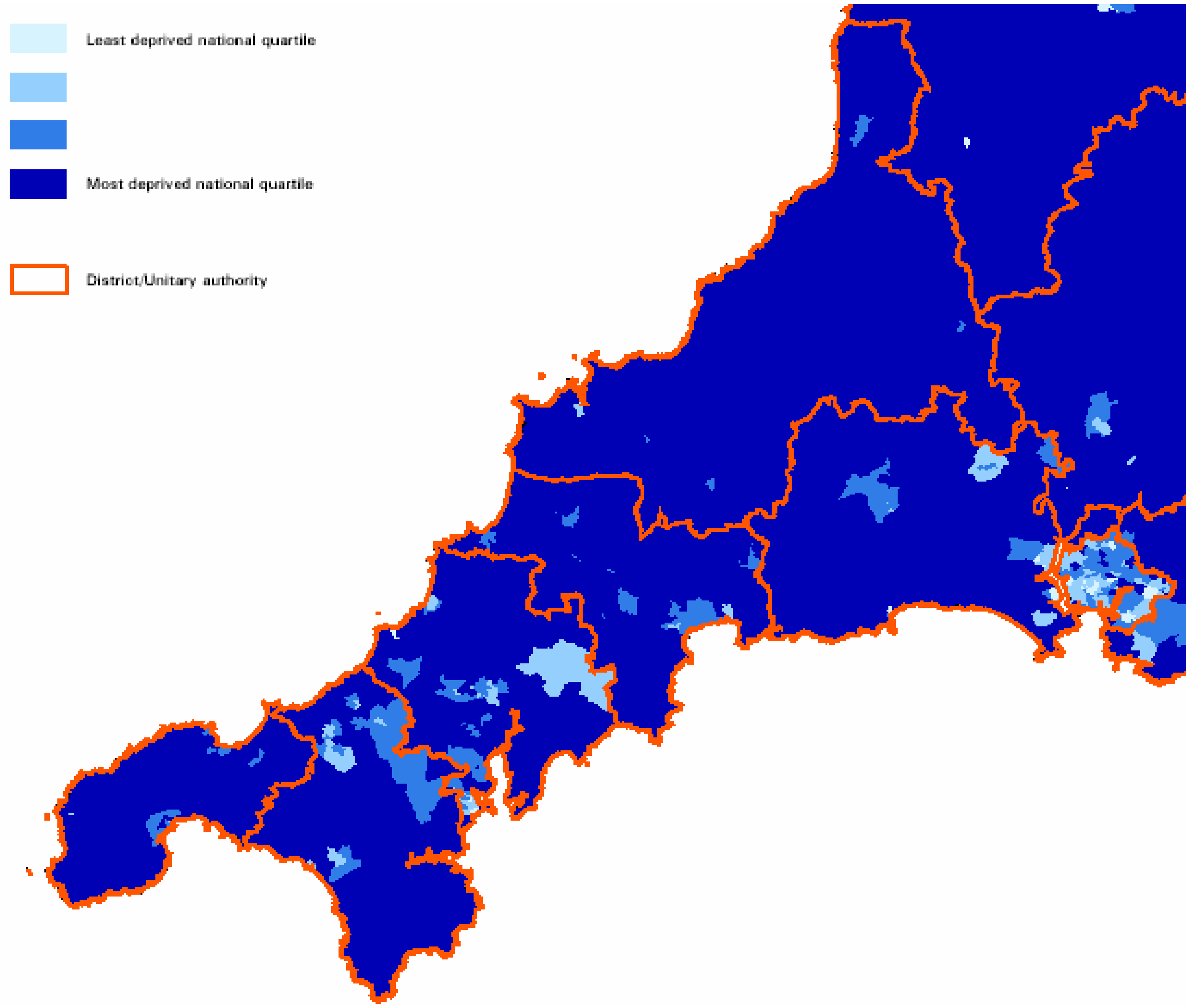
Source: Crown Copyright. All rights reserved. South West Observatory. 2004. 100039038. Source: Office of the Deputy Prime Minister 2004.

This Domain measures the incidence of recorded crime for four major crime themes, representing the occurrence of personal and material victimisation at a small area level.

- Burglary (4 recorded crime offence types, April 2002-March 2003).
- Theft (5 recorded crime offence types, April 2002-March 2003, constrained to CDRP level).
- Criminal damage (10 recorded crime offence types, April 2002-March 2003).

Violence (14 recorded crime offence types, April 2002-March 2003).

Access to Housing and Services



Source: Crown Copyright. All rights reserved. South West Observatory. 2004. 100039038. Source: Office of the Deputy Prime Minister 2004.

The purpose of this Domain is to measure barriers to housing and key local services. The indicators fall into two sub-domains: 'geographical barriers' and 'wider barriers' which also includes issues relating to *access* to housing, such as affordability.

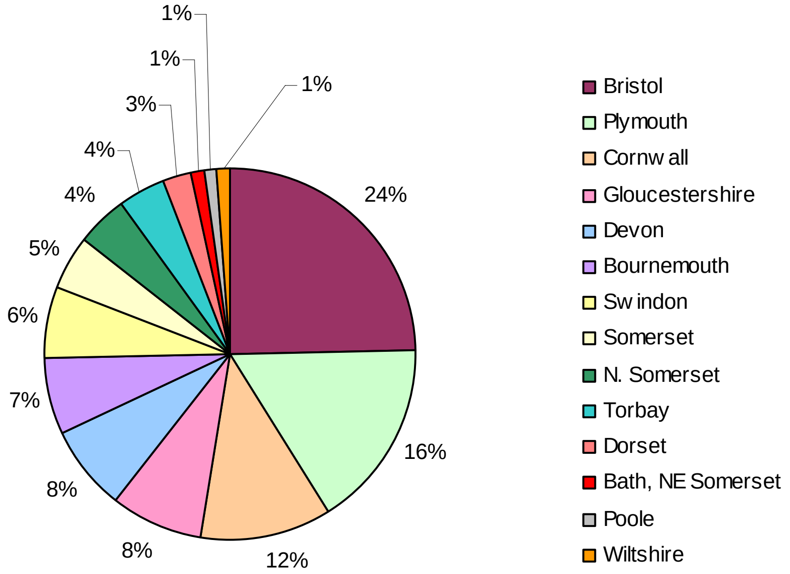
Wider Barriers

- Household overcrowding (2001).
- LA level percentage of households for whom a decision on their application for assistance under the homeless provisions of housing legislation has been made, assigned to SOAs (2002).
- Difficulty of Access to owner-occupation (2002).

Geographical Barriers

- Road distance to GP premises (2003).
- Road distance to a supermarket or convenience store (2002).
- Road distance to a primary school (2001-2002).
- Road distance to a Post Office (2003).

Figure 50: SW Distribution of Top 20% Deprived English SOAs



The English Indices of Deprivation 2004, ODPM

Source: SW RDA RES Review 2005: Evidence Base

HOUSEHOLD DEPRIVATION

- 33% of households in Cornwall live in areas ranked within the 25% most deprived nationally.
- The highest level of deprivation exists within Penwith where 43% of households are within the most deprived quartile nationally.
- The lowest is in Caradon (5.3%)
- There is a high level of deprivation in Cornwall.
- Housing affordability is a key issue.
- Housing affordability major factor in where people live and increasing need to travel.
- Impact on service provision

Source: Indices of Multiple Deprivation, 2004, ODPM

PRODUCTIVITY TRENDS & DRIVERS

- **Gross Value Added**

GVA Comparison – UK and Cornwall			
Area	**Year**	**GVA per head (£)**	**GVA per head index (UK = 100)**
Cornwall	2002	9,500	62
UK	2002	15,300	100

Source: Regional Accounts, ONS @ Crown Copyright

Gross Value Added per Head as a Percentage of National Average							
YEAR	Carradon District	Carrick District	Kerrier District	North Cornwall District	Penwith District	Restomel District	Isles of Scilly
1993	49.9	74.6	54.9	67.7	60.0	69.7	96.4
1998	55.3	73.3	54.4	67.4	55.7	70.9	90.8
2003	60.2	90.7	64.3	77.1	65.5	71.7	98.3

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 1)

The total population of Cornwall in 2003 was 513.5 thousand, approximately 0.8% of the United Kingdom total. The county's gross value added (GVA) was £6,082.9 million, representing approximately 0.62% of the national total. The difference is due to the relatively lower per capita gross value added in the county.

Cornwall's gross value added per head relative to the national average was 72.0% in 2003, a significant increase on the level of 63.2% in 1993. However, as the following table (Table 1) shows, the comparison of gross value added per head to the national average differs considerably between districts.

The Cornwall economy has comfortably outperformed the national economy over the decade (see Table 4, page four). The Cornwall economy grew by 7.5% per annum between 1993 and 2003 compared with a growth rate of 5.4% per annum for the national economy. The difference in the rates of growth has been the main reason for the closing of the gap in gross value added per head.

Along with the growth in gross value added per head, there has been a significant growth in jobs rising by just over 47,000 between 1993 and 2003 at an annual rate of 3.0% per annum. As Table 2 shows, the main drivers of the growth have been the construction, wholesale, retail and repair, the business service sectors and education. The sectors in decline in terms of job losses were agriculture, mining and quarrying, energy supply and transport and communications.

(extracted from a report by Owen Nankivell (LINC) on The Cornwall Ecomomy 1993 – 2003 published in June 2005)

GROWTH IN GROSS VALUE ADDED AT BASIC PRICES						
	1993 £m	1998 £m	2003 £m	1st Half % pa	2nd Half % pa	Whole Decade % pa
Agriculture & Forestry	203.5	80.0	143.2	-17.0	12.4	-3.5
Fishing	16.0	20.4	19.4	4.9	-1.0	1.9
Mining & Quarrying	85.3	74.3	82.9	-2.7	2.2	-0.3
Manufacturing	323.9	527.7	654.3	10.3	4.4	7.3
Electricity, Gas & Water	39.1	55.2	35.9	7.1	-8.3	-0.9
Construction	199.3	319.7	414.8	9.9	5.3	7.6
Wholesale, Retail & Repair	472.2	764.7	1,295.3	10.1	11.1	10.6
Hotels and Catering	270.4	358.3	503.9	5.8	7.1	6.4
Transport & Communications	125.3	138.9	201.8	2.1	7.7	4.9
Financial Services	70.9	78.2	114.8	2.0	8.0	4.9
Real Estate & Other Business Activities	505.3	743.7	1,334.9	8.0	12.4	10.2
Public Admin, Defence & Soc Security	118.6	148.8	205.6	4.6	6.7	5.7
Education	141.8	199.8	335.8	7.1	10.9	9.0
Health & Social Work	262.2	350.8	472.0	6.0	6.1	6.1
Other Community Services	118.0	178.1	268.5	8.6	8.6	8.6
Gross Value Added at Basic Prices	2,951.8	4,038.7	6,082.9	6.5	8.5	7.5

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 3)

The above table shows the detailed movements over the decade in the principal industrial sectors of the Cornwall economy. The economy as a whole grew by 7.5% per annum over the decade 1993 to 2003, with a faster rate of growth (8.5% per annum) in the second period 1998 to 2003, than in the first, 1993 to 1998 (6.5% per annum). The strongest growth sectors were manufacturing, wholesale, retail and repair, construction, business services and the public sector.

The table below gives the figures for the gross added value as measured by incomes. The slow growth in mixed incomes (previously known as income from self-employment) between 1993 and 1998 reflects the poor trading conditions experienced by the agriculture sector.

GROSS VALUE ADDED AT BASIC PRICES MEASURED BY INCOME						
	1993 £m	1998 £m	2003 £m	1993/ 1998 % pa	1998/ 2003 % pa	1993/ 2003 % pa
Compensation of employees	1,559.9	2,226.0	3,453.7	7.4	9.2	8.3
Mixed incomes	704.9	760.0	1,063.9	1.5	7.0	4.2
Operating surplus and rents	629.2	978.3	1,461.0	9.2	8.4	8.8
Taxes less subsidies	57.8	74.4	104.4	5.2	7.0	6.1
Gross Value Added at basic prices	2,951.8	4,038.7	6,082.9	6.5	8.5	7.5

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 8)

*****Malcolm – definitions needed for compensation, mixed incomes and operating surplus***

GROSS VALUE ADDED BY NUTS[1] 1, 2 AND 3 AREAS[2,3,4]				
Area	£ million			
	1999	2000	2001	2002
United Kingdom	782,682	816,549	859,795	906,000
South West	60,547	63,439	67,276	70,964
Cornwall & Isles of Scilly	3,993	4,260	4,569	4,840

Source: SW Regional Development Agency - Sub-regional Indicators July 2005

GROSS VALUE ADDED BY NUTS[1] 1, 2 AND 3 AREAS[2,3,4]				
Area	£ per head			
	1999	2000	2001	2002
United Kingdom	13,583	14,239	14,906	15,614
South West	12,405	12,902	13,609	14,286
Cornwall & Isles of Scilly	8,106	8,563	9,101	9,525

Source: SW Regional Development Agency - Sub-regional Indicators July 2005

[1]Nuts is a hierarchical classification of areas that provides a breakdown of the EU's economic territory
[2]GVA at current basic prices
[3]Estimates for all years are provisional
[4]Excluding GVA for Extra-Regio, comprising compensation of employees and gross operating surplus which cannot be assigned to regions.

GROSS VALUE ADDED BY NUTS[1] 1, 2 AND 3 AREAS[2,3,4]				
Area	£ per head (UK=100)			
	1999	2000	2001	2002
United Kingdom	100	100	100	100
South West	93	93	94	94
Cornwall & Isles of Scilly	61	62	63	62

Source: SW Regional Development Agency - Sub-regional Indicators July 2005

ANNUAL GROWTH IN GVA[1,2] and GVA PER HEAD (%)				
Area	GVA			
	1999	2000	2001	2002
United Kingdom	4.7	4.3	5.3	5.4
South West	4.9	4.8	6.0	5.5
Cornwall & Isles of Scilly	10.7	6.7	7.3	5.9

Source: SW Regional Development Agency – Sub-regional Indicators July 2005

ANNUAL GROWTH IN GVA[1,2] and GVA PER HEAD (%)				
Area	GVA per head			
	1999	2000	2001	2002
United Kingdom	4.3	4.8	4.7	4.7
South West	4.2	4.0	5.5	5.0
Cornwall & Isles of Scilly	9.6	5.6	6.3	4.7

Source: SW Regional Development Agency – Sub-regional Indicators July 2005

[1]Estimates for all years are provisional
[2]Excluding Extra-Regio and statistical discrepancy

CORNWALL AND NATIONAL **Composition of Output 2003 and Rates of Growth 1993 – 2003** **(% and % per annum)**				
	Cornwall % share of output 2003	**Cornwall rate of growth of output 1993/2003**	**National* % share of output 2003**	**National* rate of growth of output 1993/2003**
Agriculture & Forestry	2.4	-3.5	0.9	-1.6
Fishing	0.3	1.9	0.0	2.8
Mining & Quarrying	1.4	-0.3	2.8	5.7
Manufacturing	10.8	7.3	15.7	2.6
Electricity, Gas & Water	0.6	-0.9	1.5	0.9
Construction	6.8	7.6	6.3	6.4
Wholesale, Retail & Repair	21.3	10.6	12.7	6.0
Hotels & Catering	8.3	6.4	3.4	7.3
Transport & Communications	3.3	4.9	7.7	5.0
Financial Services	1.9	4.9	0.7	2.6
Real Estate & Other Business Activities	21.9	10.2	24.9	8.7
Public Administration, Defence & Social Security	3.4	5.7	5.2	2.1
Education	5.5	9.0	5.7	6.3
Health and Social Work	7.8	6.1	7.3	5.7
Other Community Services	4.4	8.6	5.2	8.5
Gross Value Added at Basic Prices	100.0	7.5	100.0	5.4

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 4)
** National data incorporated in the local GVA model is reproduced courtesy of the Office of National Statistics (© ONS)*

The table above compares the Cornwall performance with the national average. Cornwall's growth over the decade was much faster than nationally.

The table also shows that the proportion taken by manufacturing (10.8%) is roughly two-thirds of the national average (15.7%). The shares taken by hotels and catering together with wholesale, retail and repair and financial services were significantly higher than the national average.

Key Employment Comparisons

The table below is a useful guide to explaining the differences in the per capita gross value added between Cornwall and the national average. It shows that Cornwall has a significantly higher proportion of women employees, part-time employees and self-employed. Each of these is likely to hold down income levels. Women employees still do not earn the same as men, part-time employees clearly do not earn as much as full-time employees and the self-employed as a whole (where construction workers and small businesses predominate) do not earn as much as, say, full-time male workers in manufacturing.

The other important factor is the proportion of the population not gainfully employed. The affect of this on the conventional per capita figure can be gauged by calculating the ratio on the basis of the labour force rather than the total population. This shows a further closing of the gap.

KEY EMPLOYMENT COMPARISONS		
	Cornwall 2003	**National 2003**
Per capita GVA (£)	11,846	16,445
% gap with national	72.0	0.0
Women as % of total employees	52.5	48.5
Part-time as % of total employees	40.7	25.9
Services as % of total employees	81.4	85.9
Self-employees as % of total labour force	22.4	12.6
Labour force as % of total population	46.5	47.0
Labour force per capita GVA (£)	25,766	34,745
% gap with National	74.2	0.0

Source: Local Area Labour Force Survey, ONS Crown Copyright / Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 7)

GROSS ADDED VALUE AT BASIC PRICES MEASURED BY EXPENDITURE						
	1993 £m	**1998 £m**	**2003 £m**	**1993/ 1998 % pa**	**1998/ 2003 % pa**	**1993/ 2003 % pa**
Consumers' Expenditure	2,559.1	3,463.5	4,748.1	6.2	6.5	6.4
Investment	485.4	655.6	975.4	6.2	8.3	7.2
Exports of Goods/Services	2,446.0	3,350.4	4,239.4	6.5	4.8	5.7
Total Final Expenditure	6,138.7	8,335.9	11,158.7	6.3	6.0	6.2
Less Imports Goods/Services	2,226.6	2,877.8	4,056.9	5.3	7.1	6.2
GDP (market prices)	3,912.1	5,458.1	7,101.8	6.9	5.4	6.1
Taxes Less Subsidies	441.3	599.2	820.4	6.3	6.5	6.4
Gross Value Added at Basic Prices	3,470.9	4,858.9	6,281.4	7.0	5.3	6.1

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 9)

The table above gives details of the gross value added as measured by expenditure. Consumers' expenditure and investment have provided the strongest contribution to overall growth.

Turnover, Expenditure & GVA in Manufacturing[1], 2002							
	Total turnover (£m)	Total labour costs		Net capital expenditure		GVA at basic prices	
AREA		£ million	£ per employee	£ million	£ per employee	£ million	£ per employee
UNITED KINGDOM	439,425	84,336	22,604	13,805	3,700	141,176	37,838
SOUTH WEST	32,351	6,711	22,748	1,139	3,860	11,030	37,387
Bath & NE Somerset	..	..	..	..	..	..	..
Bournemouth	195	52	17,820	9	3,049	90	31,059
Bristol	..	..	..	..	..	..	..
N. Somerset	..	..	..	..	..	..	..
Plymouth	1,632	353	21,901	48	2,963	641	39,700
Poole	1,071	246	21,578	67	5,847	426	37,326
S. Gloucestershire	2,564	533	31,208	86	5,057	1,132	66,277
Swindon	3,508	528	28,876	101	5,546	953	52,136
Torbay	513	92	25,179	1	348	39	10,648
Cornwall	1,339	326	16,299	47	2,335	502	25,115
Devon	2,876	633	16,752	86	2,262	1,069	28,278
Dorset	1,593	416	21,320	71	3,628	700	35,833
Gloucestershire	4,797	1,029	24,428	157	3,723	1,643	39,014
Somerset	4,149	775	22,493	107	3,104	1,355	39,315
Wiltshire	2,777	649	22,075	74	2,506	1,085	36,898

Source: Annual Business Inquiry, ONS. In Region in Figures 2004/05, ONS-(SW Regional Development Agency – Sub-regional Indicators July 2005)
[1]Based on SIC 1992

ECONOMIC PROJECTORS FOR SOUTH WEST ENGLAND SUB-REGIONS		
Average Annual Real GVA Growth	**1997 – 2002**	**2002 - 2010**
SW	**+3.0**	**+2.8**
GWNS	**+3.2**	**+3.1**
Dorset & Somerset	**+3.2**	**+3.0**
CIoS	**+3.6**	**+3.9**
Devon	**+2.0**	**+1.8**

SW Regional Accounts Modelling, University of Plymouth – SWRDA RES Review 2005: Evidence Base

The above table shows tentative sub-regional GVA projections at a NUTS2 level. They suggest a relative improvement in the position of GWNS and CIoS compared with improvement in the position of GWNS and CIoS compared with Dorset, Somerset and Devon. These projects largely assume current differences in sub-regional economic performances persist because agglomeration effects favour GWNS and the negative aspects of structural change are more dominant beyond the major city-regions. Cornwall's figures reflect the "catch up" effects of relatively significant intervention policies.

Most commentators judge the period 2006-2015, covered by RR05, as likely to be one of accelerated market and structural change. The SW economy will be buffeted by these global, European and national trends. Strategy must be framed in relation to the needs to accommodate strong structural adjustments in population, employment, and trade and industry mix with ramification for all aspects – economic, social and environmental – of SD.

SW SUB-REGIONAL GDP PER HEAD 2002			
GDP Per Capita	**2002 (£)**	**2002 (EU=100)**	**2000-2002**
South West	2302	108.9	106.9
Glos, Wilts, N. Som (incl. Bristol)	28353	133.9	130.0
Dorset & Somerset	20024	9.4	96.4
Cornwall & Isles of Scilly	15366	72.6	70.2
Devon	19146	90.4	89.0
UK	24945	117.8	115,67

Source: Eurostat 2005 SWRDA RES Review 2005: Evidence Base

According to EU data, the SW region includes on of the "richest" (Swindon) and one of the "poorest" (Cornwall and Isles of Scilly) sub-regions in the EU15, in terms of GDP per head (see above). The wide sub-regional disparity in terms of GDP per capita, however, largely disappears in terms of disposable incomes ratios. Transfer payments – pensions, social benefits and other flows of funds not directly related to employment – make significant difference to relative welfare measures, as do statistical differences between workplace measurement of output and residential measurement of incomes.

Although general convergence in growth rates has occurred, the three relatively low productivity sub-regions need to achieve rates of productivity growth well in excess of the UK average in order to close the productivity gap. They have not been able to do so consistently in the past.

ELIGIBILITY SIMULATION 2007 – 2013 **Nuts 2 regions GDP data average of years 2000-2001-2002 EUROSTAT 4/4/05**			
Region	**Population 000's**	**GDP/Head EU25=100**	**GDP/Head EU15=100**
Cornwall	**507.3**	**70.16**	**64.02**
West Wales and the Valleys	1,857.6	73.98	67.5
Highlands and Islands	367.6	77.71	70.91
Merseyside	1,363.2	83.62	76.3
South Yorkshire	1,267.2	86.98	79.37
Spain – Extremaduria	1,081.2	59.89	54.64
Poland – Lubelskie	2,198.9	32.23	29.41
Summary for new member states (37 regions)	68,954.0		
Summary for below 75% threshold (70 regions)	124,049.2		

Source: Eurostat 2005 SWRDA RES Review 2005: Evidence Base

CORNWALL EMPLOYMENT				
	1993 Numbers	2003 Numbers	Change Numbers	Change % pa
Agriculture, Forestry & Fishing	4,499	3,484	-1,015	-2.5
Mining & Quarrying	2,810	1,629	-1,181	-5.3
Energy Supply	1,351	622	-729	-7.5
Construction	4,821	8,519	3,698	5.9
Manufacturing	16,135	19,858	3,723	2.1
Wholesale, Retail & Repair	24,401	40,556	16,155	5.2
Hotels & Catering	17,562	21,861	4,298	2.2
Transport & Communications	7,011	6,634	-377	-0.6
Business Services	12,794	22,550	9,756	5.8
Public Administration	7,780	8,858	1,078	1.3
Education	10,323	17,473	7,150	5.4
Health	13,351	13,588	237	0.2
Social & Other Community Work	13,109	17,600	4,491	3.0
Total	135,947	183,232	47,285	3.0

Source: Annual Business Enquiry, ONS Crown Copyright Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 2)

Labour Force, September 2003 to May 2005[1,2] (% & '000s)												
	In Employment (%)											
	Employees				Self-employed				Total[3]			
AREA	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
GREAT BRITAIN	82.4	82.3	82.5	82.6	12.1	12.1	12.0	12.0	95.1	95.1	95.3	95.3
SOUTH WEST	81.8	81.7	81.2	81.4	14.3	14.4	14.4	14.2	96.7	96.8	96.6	96.6
Bath & NE Somerset	81.8	82.8	81.1	81.5	15.9	14.9	14.4	15.2	97.7	97.7	96.7	97.8
Bournemouth	82.5	83.5	79.5	80.8	12.5	12.7	12.3	11.0	96.3	96.2	94.5	94.5
Bristol	85.6	85.1	84.3	84.3	9.1	9.6	10.7	10.6	95.7	95.7	95.9	95.5
N. Somerset	82.7	81.6	83.5	84.5	15.3	15.3	13.4	12.4	98.0	98.0	96.9	96.9
Plymouth	89.0	87.1	84.3	84.5	7.6	8.6	10.4	10.3	96.6	95.7	95.7	94.8
Poole	84.7	84.5	79.1	79.7	12.5	14.1	17.9	17.2	97.2	98.6	97.0	96.9
S. Gloucestershire	87.6	88.2	87.2	87.5	10.1	10.2	10.5	9.6	97.7	98.4	97.7	97.1
Swindon	82.7	81.7	85.6	85.0	12.5	12.5	11.5	11.2	95.2	94.2	97.1	97.2
Torbay	79.7	76.7	75.9	77.6	13.6	15.0	19.0	17.2	94.9	93.3	96.6	96.6
Cornwall & Isles of Scilly	75.3	74.9	77.6	78.9	19.7	19.4	17.2	17.1	95.8	95.5	95.6	96.3
Devon	79.3	79.6	77.6	77.2	16.4	16.1	17.2	17.6	96.8	97.1	96.8	97.1
Dorset	78.2	78.5	80.3	80.8	18.1	17.8	16.2	15.2	97.3	97.9	97.5	97.5
Gloucestershire	82.7	82.5	83.1	82.7	13.8	13.6	12.5	12.7	96.8	96.9	96.3	96.3
Somerset	82.8	82.9	80.5	79.3	14.1	14.0	16.2	16.2	97.7	98.1	97.4	96.6
Wiltshire	82.0	81.6	81.9	82.3	14.6	14.9	14.1	13.8	97.0	96.9	96.5	96.6

[1]Based on the economically active population aged 16+ in private households, student halls of residence and NHS accommodation
[2]Q1 to 4 represent four quarter averages for Sep 03 - Aug 04, Dec 03 - Nov 04, Mar 03 - Feb 04 and Jun 04 to May 05, respectively; and are consistent with 2001 Census data
[3]Includes those on government-supported employment and training progarmmes, and unpaid family workers.

[4]*Includes those on government-supported employment and training progarmmes, and unpaid family workers, as a percentage of all people of working age.*

Source: Labour Force Survey, Nomisweb, ONS – (SW Regional Development Agency – Sub-regional Indicators July 2005)

Labour Market Statistics by Local Authority

AREA	Economic activity rate[1,2] Jun 04 - May 05 (%)	Total in employment[1,3] Jun 04 - May 05 ('000s)	Claimant count[4], June 2004			
			Level ('000s)	Females (% of claimants)	% claiming over 12 months[5]	Claimant count rate[6]
GREAT BRITAIN	78.7	27,467	830.0	25.8	13.9	2.3
SOUTH WEST	81.6	2,443	40.9	26.8	10.0	1.4
Cornwall & Isles of Scilly	79.0	237	4.9	27.2	10.3	1.6
Caradon	79.6	37	0.6	26.9	7.7	1.2
Carrick	80.1	41	1.0	23.0	11.0	1.9
Kerrier	73.0	41	1.0	26.5	9.5	1.7
North Cornwall	78.9	37	0.7	29.6	11.5	1.4
Penwith	82.6	34	0.7	26.3	11.6	1.9
Restormel	81.2	47	1.0	31.0	9.6	1.8
Isles of Scilly	#	#	0.0	33.3	0.0	0.2

Source: Nomisweb, ONS – (SW Regional Development Agency – Sub-regional Indicators July 2005)

[1]*These Annual Local Labour force Survey estimates are a four-quarter average cover the period Jun 2004 to May 2005 and have been adjusted to take account of the 2001 Census population data*

[2]*Based on the population of working age*

[3]*Based on people aged 16 and over*

[4]*Count of claimants of unemployment-related benefit, i.e. Jobseeker's Allowance*

[5]*People who have been claiming for more than 12 months (computerised claims only) as a percentage of total computerised claimants*

[6]*Claimant count, as a percentage of the resident working-age population of an area*

Labour Force by Age, 2003 -04[1] (% & '000s)[1]

	16-19	20-24	25-34	35-49	50-64 (M)/ 50-59 (F)	65+(M)/ 60+(F)	All ages (thousands)
GREAT BRITAIN	6.2	9.3	22.1	37.1	21.9	3.4	28,462
SOUTH WEST	6.8	8.7	20.6	35.9	23.7	4.4	2,502
Bath & NE Somerset	6.8	8.0	19.3	36.4	25.0	4.5	88
Bournemouth	6.1	9.8	26.8	31.7	19.5	6.1	82
Bristol	6.4	11.3	27.0	34.3	17.6	3.4	204
N. Somerset	7.4	8.4	16.8	40.0	24.2	3.2	95
Plymouth	6.8	13.6	21.2	33.9	20.3	4.2	118
Poole	5.7	8.6	24.3	32.9	24.3	4.3	70
S. Gloucestershire	5.3	9.9	22.1	35.9	24.4	2.3	131
Swindon	6.0	9.0	23.0	39.0	19.0	4.0	100
Torbay	6.8	8.5	18.6	35.6	25.4	5.1	59
Cornwall & Isles of Scilly	7.5	9.6	20.0	34.6	25.0	3.3	240
Devon	7.4	7.2	17.8	36.1	26.9	4.6	349
Dorset	6.2	7.3	16.6	37.8	26.4	5.7	193
Gloucestershire	6.6	8.3	19.8	36.5	24.0	4.9	288
Somerset	7.4	6.2	21.0	35.4	24.9	5.1	257
Wiltshire	6.1	8.3	21.0	36.2	23.6	4.8	229

[1]*Four-quarter average*

**Figure is for 16-24 year olds*

Source: Nomisweb, ONS- (Source: SW Regional Development Agency – Sub-regional Indicators July 2005)

Labour Force by Age, June 2004 - May 2005 (% & '000s)[1]							
	16-19	20-24	25-34	35-49	50-64 (M)/ 50-59 (F)	65+ (M)/ 60+ (F)	All ages (thousands)
GREAT BRITAIN	6.3	9.3	21.6	37.1	22.1	3.5	28,822
SOUTH WEST	6.6	8.5	19.8	36.1	24.4	4.5	2,529
Bath & NE Somerset	6.5	8.7	21.7	31.5	27.2	4.3	92
Bournemouth	6.8	20.5	21.9	28.8	17.8	4.1	73
Bristol	7.1	10.1	27.3	31.8	21.2	2.5	198
N. Somerset	7.2	8.2	19.6	37.1	25.8	2.1	97
Plymouth	7.8	11.2	21.6	36.2	21.6	1.7	116
Poole	12.5*		26.6	34.4	23.4	3.1	64
S. Gloucestershire	2.2	8.1	27.9	35.3	23.5	2.9	136
Swindon	4.7	11.2	23.4	40.2	17.8	2.8	107
Torbay	17.2*		17.2	36.2	24.1	5.2	58
Cornwall & Isles of Scilly	6.1	7.7	16.7	37.8	28.0	3.7	246
Devon	6.3	7.8	15.9	37.2	26.5	6.3	347
Dorset	7.6	7.1	17.7	33.8	28.3	5.6	198
Gloucestershire	6.7	8.0	19.3	38.0	23.3	4.3	300
Somerset	6.8	7.9	17.3	34.6	26.3	7.1	266
Wiltshire	8.2	7.3	18.1	40.5	21.6	4.3	232
[1]Four-quarter average							

[1]Four-quarter average

**Figure is for 16-24 year olds*

Source: Labour Force Survey, Nomisweb, ONS- (Source: SW Regional Development Agency – Sub-regional Indicators July 2005)

Average Weekly Hours, 2004		
	Full-time male	Full-time female
GREAT BRITAIN	40.8	37.5
SOUTH WEST	41.0	37.7
Cornwall & Isles of Scilly	40.9	37.7

Source: Annual Survey of Hours and Earnings, ONS – (SW Regional Development Agency – Sub-regional Indicators July 2005)

Full & Part-time Employment, Autumn 2004 (% & '000s)							
	Males over 16				Females over 16		
	Full-time	Part-time	All in employment (=100%) (thousands)		Full-time	Part-time	All in employment (=100%) (thousands)
UNITED KINGDOM	90.5	9.5	14,689		57.3	42.7	12,311
SOUTH WEST	88.1	11.9	1,248		51.2	48.8	1,060
Cornwall & Isles of Scilly	85.0	15.0	130		46.2	53.8	107

Source: Labour Force Survey, In Region in Figures 2004/05, ONS – (SW Regional Development Agency – Sub-regional Indicators July 2005)

Industrial Composition of Employee Jobs by Gender, 2003[1] (% and '000s) Part 1							
	Agriculture, hunting , forestry & fishing[2]	Mining, quarrying (inc. oil & gas extraction)	Manufacturing	Electricity, gas, water	Construction	Distribution, hotels & catering, repairs	Transport, storage & communication
Males							
GREAT BRITAIN	1.2	0.4	18.5	0.6	7.5	23.0	8.6
SOUTH WEST	1.8	0.5	19.1	0.8	7.7	25.3	7.0
Cornwall & Isles of Scilly	3.9	1.7	15.8	0.6	8.6	31.6	5.9
Females							
GREAT BRITAIN	0.5	0.0	6.6	0.3	1.3	26.3	3.4
SOUTH WEST	0.7	0.0	6.0	0.2	1.2	29.5	2.5
Cornwall & Isles of Scilly	1.0	0.1	6.2	0.1	0.9	35.8	1.5

Industrial Composition of Employee Jobs by Gender, 2003[1] (% and '000s) Part 2					
	Financial & business services	Public administration & defence	Education, social work & health service	Other services	Whole economy (=100%) (thousands)
Males					
GREAT BRITAIN	20.8	5.3	9.1	5.0	12,980
SOUTH WEST	18.0	6.0	9.4	4.5	1,060
Cornwall & Isles of Scilly	12.4	4.8	10.0	4.7	88
Females					
GREAT BRITAIN	18.8	5.5	31.9	5.4	12,739
SOUTH WEST	16.6	5.4	33.2	4.6	1,092
Cornwall & Isles of Scilly	12.0	4.8	32.4	5.0	96

Source: Annual Business Inquiry, ONS – (SW Regional Development Agency – Sub-regional Indicators July 2005)
[1]At December. Figures based on SIC 1992
[2]For some areas, the figures are aggregates from which some/all agriculture class 01.00 (broadly farm workers; SIC 92) has been excluded.

Industrial Composition of All Employee Jobs 2003[1] (% and '000s) Part 1

	Agriculture, hunting , forestry & fishing[2]	Mining, quarrying (inc. oil & gas extraction)	Manufacturing	Electricity, gas, water	Construction	Distribution, hotels & catering, repairs	Transport, storage & communication
GREAT BRITAIN	0.9	0.2	12.6	0.4	4.4	24.7	6.0
SOUTH WEST	1.2	0.2	12.5	0.5	4.4	27.4	4.7
Cornwall & Isles of Scilly	2.4	0.9	10.8	0.3	4.6	33.8	3.6

Industrial Composition of All Employee Jobs 2003[1] (% and '000s) Part 2

	Financial & business services	Public administration & defence	Education, social work & health service	Other services	Whole economy (=100%) (thousands)
GREAT BRITAIN	19.8	5.4	20.4	5.2	25,716
SOUTH WEST	17.3	5.7	21.5	4.6	2,152
Cornwall & Isles of Scilly	12.2	4.8	21.7	4.9	185

[1]At December. Figures based on SIC 1992
[2]For some areas, the figures are aggregates from which some/all agriculture class 01.00 (broadly farm workers; SIC 92) has been excluded.
Source: Annual Business Inquiry, ONS – (SW Regional Development Agency – Sub-regional Indicators July 2005)

Average Gross Weekly Earnings[1], April 2003

	Males					Females			
		Percentage earning under					Percentage earning under		
	Total (£)	£250	£350	£460		Total (£)	£250	£350	£460
UNITED KINGDOM	522.6	11.3	33.6	55.0		394.8	24.4	52.9	72.2
SOUTH WEST	485.1	12.2	35.8	57.9		364.7	27.5	59.8	78.3
Bath & NE Somerset	527.6	8.6	25.3	48.6		363.7	25.3	63.3	78.1
Bournemouth	..	..	..	..		340.7	32.8	67.2	82.0
Bristol, City of	503.9	10.2	33.6	53.1		395.9	18.3	49.9	72.6
North Somerset	..	..	..	..		351.0	30.0	61.0	80.0
Plymouth	459.1	13.6	38.6	58.2		351.4	24.9	57.2	80.9
Poole	569.3	11.3	32.1	50.6		..	..	..	..
S. Gloucestershire	554.8	7.4	26.5	49.1		396.0	19.5	48.5	70.4
Swindon	574.5	7.8	24.1	43.8		393.6	21.0	51.1	77.6
Torbay	..	..	..	..		..	..	..	..
Cornwall & Isles of Scilly	411.5	21.0	47.9	73.1		..	..	..	..
Devon	422.2	16.9	43.8	67.6		324.7	35.0	66.3	84.9
Dorset	436.6	16.8	38.8	62.0		359.3	22.8	61.7	76.6
Gloucestershire	500.6	7.9	33.2	56.4		386.8	24.9	58.0	78.6
Somerset	455.9	12.0	40.0	60.6		355.3	32.8	66.6	76.7
Wiltshire	491.3	13.1	36.3	57.8		359.9	30.8	60.7	79.1

[1]Data relate to full-time employees on adult rates whose pay for the survey pay-period was not affected by absence.
Source: New Earnings Survey. In Region in Figures, ONS - SW Regional Development Agency – Sub-regional Indicators July 2005

Average Gross Weekly Earnings[1], 2004				
	Average weekly earnings (£)			
	Males	**Females**	**Total**	
UNITED KINGDOM	556.8	420.2	504.9	
SOUTH WEST	509.5	384.6	462.7	
Bath & NE Somerset	526.9	384.7	472.0	
Bournemouth	443.8	359.3	402.7	
Bristol, City of	548.8	418.8	498.0	
North Somerset	582.2	373.4	503.7	
Plymouth	506.5	367.8	453.0	
Poole	594.5	365.4	501.1	
S. Gloucestershire	580.0	419.0	533.7	
Swindon	624.8	414.3	546.7	
Torbay	433.3	372.2	399.7	
Cornwall & Isles of Scilly	411.4	359.9	391.3	
Devon	446.6	366.8	418.7	
Dorset	464.0	372.6	432.5	
Gloucestershire	523.3	405.3	482.6	
Somerset	477.7	368.2	439.2	
Wiltshire	511.0	382.0	458.4	

[1]Full-time workers, including overtime
Source: Annual Survey of Hours and Earnings, ONS

- **Labour and Skills**

The tables below show that there is a good basic level of education locally.

% OF ADULT POPULATION WITH LITERACY AND NUMBERCY SKILLS BELOW ENTRY LEVEL 3 (CORNWALL)										
BASIC SKILLS	Carradon District	Carrick District	Kerrier District	North Cornwall District	Penwith District	Restomel District	Cornwall County	Cornwall and Isles of Scilly	South West	England
Literacy below entry level 3	1.3	1.4	1.6	1.6	1.7	2.0	1.6	1.8	5.0	5.0
Numeracy below entry level 3	16.8	17.2	19.5	20.8	19.7	19.8	19.0	19.1	21.0	21.0

Source: DfES Skills for Life Survey / LINC – Local Intelligence Network Cornwall

% PUPILS ACHIEVING 5+ GCSEs GRADES A*-C (CORNWALL)										
YEARS	Carradon District	Carrick District	Kerrier District	North Cornwall District	Penwith District	Restomel District	Cornwall County	Isles of Scilly	South West	England
2000	50.9	56.6	48.5	48.3	58.1	56.5	52.6	76.9	NK	49.2
2001	51.6	58.2	50.9	50.0	54.9	56.8	53.3	70.8	NK	50.0
2002	55.9	62.4	49.0	48.4	58.7	55.0	54.1	63.0	NK	51.6
2003	57.4	59.2	47.7	50.9	58.1	56.7	54.4	87.5	54.6	52.9
2004	56.6	58.4	48.3	53.9	54.8	58.1	54.7	89.3	54.6	53.7

Source: DfES / LINC – Local Intelligence Network Cornwall

% OF WORKING AGE POPULATION WITH NO QUALIFICATIONS (CORNWALL)									
YEARS	Carradon District	Carrick District	Kerrier District	North Cornwall District	Penwith District	Restomel District	Cornwall and Isles of Scilly	South West	United Kingdom
2000	SD	20.1	20.7	14.1	SD	21.5	MD	13.4	MD
2001	12.4	SD	19.5	17.1	SD	13.8	MD	12.8	MD
2002	SD	12.5	14.0	17.7	14.8	14.6	MD	12.0	MD
2003	SD	11.3	10.3	12.0	SD	14.8	MD	11.2	MD
2004	5.9	7.3	11.5	12.4	11.3	12.6	10.2	10.7	15.4

Source: Local Area Labour Force Survey ONS Crown Copyright / LINC – Local Intelligence Network Cornwall

Qualifications of individuals across industrial sectors

Introduction

This statistical release provides information on the level of qualification of individuals working in specific industrial sectors. The release focuses particularly on:

- the extent to which the employed workforce is qualified
- what proportion of the employed workforce is qualified below Level 2
  (the Government considers Level 2 to be the benchmark for employability),
- differences in level of qualification by industrial sector
- The source of the data is Census 2001 published by the Office for National Statistics (ONS).

The Census data has been analysed at regional, local LSC, county/unitary authority and local authority levels. The data refers to all adults (aged 16 to 74) who are in employment. It is important to note that geographical data is workplace based. This means that the data for a particular geography is based on individuals who work there irrespective of where they live. Thus data for a specific area comprises those individuals who work in that area but may live in that area or elsewhere.

Qualifications data have been disaggregated by broad industrial sector only. More detailed disaggregation is not available. Accordingly, this statistical release considers twelve broad industrial sectors.

Key points

Almost three quarters (73%) of the employed workforce of Cornwall aged 16-74 have some qualification at Levels 1 to 5. Two in five (40%) are qualified below Level 2 or do not have a qualification. This profile is marginally less favourable than that for the south west region, where 75% have a qualification at Levels 1 to 5 and 38% are qualified below Level 2 or not qualified.

The Financial Intermediation sector has the highest proportion of employees (91%) who are qualified at Levels1 to 5.

Other sectors with high proportions of employees qualified are:

- Real Estate,
- Renting and Business Activities (87%);
- Public Administration (87%)
- Education (87%).

Sectors with low proportions of employees with qualifications are

- Agriculture,
- Hunting,
- Forestry and Fishing (58%)
- Construction (58%). (Table 2)

Sectors with particularly high proportions of employees qualified below Level 2 or without a qualification are:

- Agriculture,
- Hunting,
- Forestry and Fishing (55%);
- Retail (50%)
- Construction (49%). (Table 2)

QUALIFICATION LEVELS BY GEOGRAPHY			
Area	**% with qualifications (L1-L5**	**% qualified <L2**	**Working Population**
South West	75	38	2,265,920
Devon and Cornwall	73	40	674,152
Cornwall	72	40	202,562
Devon	73	40	306,591
Plymouth	76	37	113,075
Torbay	73	41	51,924
Caradon	71	42	26,953
Carrick	77	34	42,789
East Devon	73	41	45,230
Exeter	79	34	71,232
Isles of Scilly	79	32	1,293
Kerrier	72	41	34,780
Mid Devon	68	45	26,863
North Cornwall	71	43	35,269
North Devon	71	42	40,549
Penwith	72	40	22,839
Plymouth UA	76	37	113,075
Restormel	70	43	38,644
South Hams	76	38	37,824
Teignbridge	71	42	44,263
Torbay UA	73	41	51,924
Torridge	67	46	22,072
West Devon	71	42	18,558

Source: Census 2001, ONS Crown Copyright – Learning Skills Council – Qualifications of individual across industrial sectors

QUALIFICATIONS BY INDUSTRIAL SECTOR IN DEVON AND CORNWALL			
AREA	**% with qualifications (L1-L5)**	**% qualified <L2**	**Working Population**
Agriculture	58	55	25,416
Mining/Manufacturing	69	47	93,406
Construction	58	49	52,088
Wholesale/Retail	68	50	119,418
Hotels Restaurants	67	46	50,065
Transport/Comms.	68	48	38,219
Financial Intermediation	91	24	15,710
Real Estate/Renting/Business	87	27	61,007
Public Administration	87	27	48,863
Education	87	21	52,381
Health/Social Work	80	29	82,872
Other	75	36	34,707
Total	73	40	674,152

Source: Census 2001, ONS Crown Copyright – Learning Skills Council – Qualifications of individual across industrial sectors

QUALIFICATION LEVELS IN AGRICULTURE, HUNTING, FORESTRY AND FISHING			
AREA	**% with qualifications (L1-L5**	**% qualified <L2**	**Working Population**
South West	59	54	58,232
Devon and Cornwall	58	55	25,416
Cornwall	58	54	9,561
Devon	58	55	14,795
Plymouth	57	58	482
Torbay	58	55	578
Caradon	59	54	1,627
Carrick	60	51	1,359
East Devon	58	55	2,561
Exeter	53	52	390
Isles of Scilly	63	52	88
Kerrier	56	53	1,489
Mid Devon	57	56	2,354
North Cornwall	59	56	2,477
North Devon	53	59	2,094
Penwith	57	52	1,324
Plymouth UA	57	58	482
Restormel	59	54	1,200
South Hams	63	50	1,862
Teignbridge	64	48	1,523
Torbay UA	58	55	578
Torridge	54	61	2,357
West Devon	60	54	1,654

Source: Census 2001, ONS Crown Copyright – Learning Skills Council – Qualifications of individual across industrial sectors

QUALIFICATION LEVELS IN MINING, MAUFACTURING AND UTILITIES			
AREA	**% with qualifications (L1-L5**	**% qualified <L2**	**Working Population**
South West	71	46	340,980
Devon and Cornwall	69	47	93,406
Cornwall	67	48	25,718
Devon	69	48	43,039
Plymouth	71	45	17,018
Torbay	72	47	7,631
Caradon	69	45	2,832
Carrick	68	43	3,841
East Devon	68	49	4,932
Exeter	74	44	7,289
Isles of Scilly	77	33	57
Kerrier	67	48	4,952
Mid Devon	65	51	5,219
North Cornwall	68	50	5,739
North Devon	67	50	6,572
Penwith	64	46	1,836
Plymouth UA	71	45	17,018
Restormel	66	51	6,463
South Hams	71	46	6,390
Teignbridge	70	45	6,419
Torbay UA	72	47	7,631
Torridge	65	49	3,903
West Devon	66	50	2,315

Source: Census 2001, ONS Crown Copyright – Learning Skills Council – Qualifications of individual across industrial sectors

QUALIFICATION LEVELS IN CONSTRUCTION			
AREA	**% with qualifications (L1-L5**	**% qualified <L2**	**Working Population**
South West	59	51	163,791
Devon and Cornwall	58	49	52,088
Cornwall	57	50	16,788
Devon	57	50	24,802
Plymouth	61	46	6,945
Torbay	56	51	3,553
Caradon	55	53	2,415
Carrick	59	47	2,904
East Devon	54	51	3,997
Exeter	63	46	4,360
Isles of Scilly	74	42	69
Kerrier	57	50	3,229
Mid Devon	53	52	2,457
North Cornwall	57	51	3,341
North Devon	56	51	3,041
Penwith	54	49	1,719
Plymouth UA	61	46	6,945
Restormel	55	51	3,110
South Hams	60	47	2,721
Teignbridge	59	49	4,666
Torbay UA	56	51	3,553
Torridge	52	53	2,053
West Devon	58	50	1,507

Source: Census 2001, ONS Crown Copyright – Learning Skills Council – Qualifications of individual across industrial sectors

QUALIFICATION LEVELS IN WHOLESALE AND RETAIL			
AREA	**% with qualifications (L1-L5**	**% qualified <L2**	**Working Population**
South West	70	48	388,656
Devon and Cornwall	68	50	119,418
Cornwall	68	50	38,083
Devon	69	49	53,981
Plymouth	69	49	17,899
Torbay	68	51	9,455
Caradon	66	51	5,457
Carrick	71	45	7,803
East Devon	68	50	7,620
Exeter	73	47	12,776
Isles of Scilly	77	38	180
Kerrier	66	52	6,463
Mid Devon	64	53	4,777
North Cornwall	67	51	6,804
North Devon	69	49	7,523
Penwith	69	48	4,456
Plymouth UA	69	49	17,899
Restormel	67	52	6,920
South Hams	71	47	6,022
Teignbridge	67	51	8,677
Torbay UA	68	51	9,455
Torridge	65	53	3,578
West Devon	66	50	3,008

Source: Census 2001, ONS Crown Copyright – Learning Skills Council – Qualifications of individual across industrial sectors

Qualifications of economically active adults and adults of working age: 2004/2005

Introduction

The following statistical release is based on information obtained from the *annual* Local Labour Force Survey 2004/05 carried out by the Office for National Statistics (ONS). Qualification data for working aged economically active adults have also been published using data from the autumn 2004 *quarterly* Labour Force Survey, which (because of its smaller sample size) provides reliable information only at country and regional levels. The *annual* LFS is the preferred data source for smaller geographical areas because it uses boosted samples. Even so, a sampling error is attached to each estimate and a confidence interval (CI) gives the range on either side of the estimate within which the true value occurs.

The following statistical release provides information on The level of qualifications held by adults who are economically active (that is, those who are aged 18 to 59 or 64, and are working, unemployed or actively seeking employment)

The level of qualifications held by adults of working age (this includes both the economically active and inactive aged 16-59/64)

The relationship between levels of qualification and employment rate (for those aged 16-59/64) Participation in learning by people aged 16 to 69.

Key Points

Economically active adults

72.3% of economically active adults in Devon and Cornwall are qualified to Level 2 and above; 48.4% are qualified to Level 3 and above; and 25.8% are qualified to Level 4 and above (Table 1) Although the percentages of economically active adults qualified to at least Level 2, Level 3 and Level 4 have all gone down a little since 2003/04, the differences are slight. (Table 1).

Compared with the South West, the percentage of economically active adults qualified to Level 2 is broadly similar. However, at levels 3 and 4, Cornwall continues to lag behind the south west. (Table 1).

Compared with England, the percentage of economically active adults qualified to Level 2 is higher, but at Level 3 Cornwall is slightly behind, and at Level 4 the gap is greater. (Table 1)

Across four administrative areas (Cornwall, Devon, Plymouth and Torbay) the latter two have substantially more economically active adults qualified below Level 2.

Among the local authority districts, North Cornwall has the highest proportion of economically active adults qualified below Level 2 (35.2%) In contrast, Carrick is the districts with the lowest proportion of economically active adults without a Level 2 (17.9% (Table 1)

Adults of working age

69.6% of all adults in Cornwall are qualified to Level 2 and above; 43.3% are qualified to Level 3 and above and 20.2% are qualified to Level 4 and above (Table 3).

The proportion of all adults qualified to Level 2 is almost the same as it was in 2003/04. The proportions qualified to at least Level 3 and at least Level 4 have fallen since 2003/04, but the falls in the percentages are slight. (Table 3)

Compared with the south west region, the percentage of adults qualified to Level 2 is very similar, but at levels 3 and 4 Cornwall lags behind. (Table 3)

The percentage of adults qualified to Level 2 is higher than in England, but at Level 3 Cornwall is slightly behind, and at Level 4 the gap is greater. (Table 3)

adults of working age qualified below Level 2

(Table 3)

Across the four administrative areas (Cornwall, Devon, Plymouth and Torbay) the latter two have substantially more adults of working age qualified below Level 2. Among the Cornwall local authority districts North Cornwall has the highest proportion of adults of working age qualified below Level 2 (39.0%), whereas Carrick is the district with the lowest proportion of adults without a Level 2 (at 22.8%). (Table 3). Looking at numbers of individuals, North Cornwall and Restormel have the most adults of working age qualified below Level 2 (around 19,000 and 20,000 respectively), whereas Penwith has the fewest (around 10,000)

The relationship between employment and level of qualification

The overall employment rate (the proportion of adults of working age who are in some form of employment) for Devon and Cornwall is 76.2%. This rate differs by level of qualification held. Accordingly, 86.3% of those qualified to Level 4 are in some form of employment, whereas for those qualified below Level 2 the rate is 73.8% and for those without qualifications it is only 53.3%.

Participation in learning of people aged 16 to 69

During the last three years, 49.1% of adults aged 16-69 participated in some form of taught learning and 71% participated in any learning. These rates are very similar to the south west averages and higher than the England averages. (Table 5)

The Cornish district with the lowest participation in taught learning and any learning is North Cornwall (40.2% and 62.3% respectively). In contrast the district with highest participation in taught learning and in any learning is Carrick (54.3% and 75.9% respectively). (Table 5) Comparison of the 2004/05 figures with those for 2003/04 shows that the numbers of individuals participating in taught learning and any learning have decreased. In Devon and Cornwall in 2003/04, around 622,000 said they had participated in taught learning during the preceding three years, but for 2004/05 the figure fell to 491,000. For any learning, in Devon and Cornwall in 2003/04, about 791,000 said they had participated, but in 2004/05 only around 709,000 had done so. (Table 6)

The fall in those participating in taught learning and any learning mirrors the situation nationally: in 2003/04 in England, 59.7% said they had participated in taught learning during the preceding three years but the 2004/05 figure decreased to 48.6%. (Table 6)

HIGHEST LEVEL OF QUALIFICATIONS OF ECONOMICALLY ACTIVE ADULTS 2004/2005 (Table 1 – part 1)					
		Econ Active Adults qualified to at least Level 4			
	Pop'n	2004/05		2003/04	
AREA	000's	000's	%	CI (%)	%
England	23,211	7,025	30.3%	0.3%	29.2%
South West	2,324	685	29.5%	0.8%	29.2%
Devon and Cornwall	710	183	25.8%	1.4%	27.3%
Cornwall and Isles of Scilly LP	232	53	22.8%	2.8%	25.7%
Caradon	37	7	19..2%	6.2%	29.7%
Carrick	41	14	35.2%	7.6%	7.6%
Kerrier	43	8	19.8%	6.2%	6.2%
North Cornwall	36	7	19.4%	7.1%	7.1%
North Devon	41	8	18.6%	6.2%	6.2%
Penwith	30	6	21.6%	7.2%	7.2%
Plymouth	111	25	22.3%	2.8%	2.8%
Restormel	45	10	21.0%	6.3%	6.3%

Source: Local Labour Force Survey 2004/05 – Learning Skills Council – Qualifications of economically active adults and adults of working age 2004/2005

HIGHEST LEVEL OF QUALIFICATIONS OF ECONOMICALLY ACTIVE ADULTS 2004/2005 (Table 1 – part 2)					
		Econ Active Adults qualified to at least Level 3			
	Pop'n	2004/05		2003/04	
AREA	000's	000's	%	CI (%)	%
England	23,211	11,569	49.8%	0.3%	48.9%
South West	2,324	1,180	50.8%	0.9%	50.7%
Devon and Cornwall	710	344	48.4%	1.6%	49.3%
Cornwall and Isles of Scilly LP	232	112	48.6%	3.3%	50.1%
Caradon	37	18	49.7%	7.8%	56.9%
Carrick	41	24	59.8%	7.8%	56.3%
Kerrier	43	20	46.0%	7.7%	48.4%
North Cornwall	36	15	42.9%	8.8%	43.2%
North Devon	41	17	41.4%	7.9%	42.3%
Penwith	30	15	52.3%	8.8%	48.5%
Plymouth	111	50	45.0%	3.3%	44.8%
Restormel	45	19	42.0%	7.6%	47.5%

Source: Local Labour Force Survey 2004/05 – Learning Skills Council – Qualifications of economically active adults and adults of working age 2004/2005

HIGHEST LEVEL OF QUALIFICATIONS OF ECONOMICALLY ACTIVE ADULTS 2004/2005 (Table 1 – part 3)					
		Econ Active Adults qualified to at least Level 2			
	Pop'n	2004/05		2003/04	
AREA	000's	000's	%	CI (%)	%
England	23,211	16,463	70.9%	0.3%	70.2%
South West	2,324	1,683	72.4%	0.8%	72.0%
Devon and Cornwall	710	513	72.3%	1.4%	72.8%
Cornwall and Isles of Scilly LP	232	172	74.1%	2.9%	74.5%
Caradon	37	27	73.7%	6.9%	80.3%
Carrick	41	33	82.1%	6.1%	80.5%
Kerrier	43	33	77.6%	6.4%	76.7%
North Cornwall	36	2.3	64.8%	8.5%	68.4%
North Devon	41	27	64.7%	7.6%	69.8%
Penwith	30	24	80.0%	7.0%	77.9%
Plymouth	111	78	70.3%	3.1%	69.4%
Restormel	45	30	67.2%	7.3%	64.7%

Source: Local Labour Force Survey 2004/05 – Learning Skills Council – Qualifications of economically active adults and adults of working age 2004/2005

HIGHEST LEVEL OF QUALIFICATIONS OF ECONOMICALLY ACTIVE ADULTS 2004/2005 (Table 1 – part 4)					
		Adults without a Level 2 Qualification			
	Pop'n	2004/05		2003/04	
AREA	000's	000's	%	CI (%)	%
England	23,211	6,748	29.1	0.3	29.8
South West	2,324	641	27.6	0.8	27.6
Devon and Cornwall	710	197	27.7	1.4	27.2
Cornwall and Isles of Scilly LP	232	60	25.9	2.9	25.5
Caradon	37	10	26.3	6.9	19.7
Carrick	41	7	17.9	6.1	19.5
Kerrier	43	10	22.4	6.4	23.3
North Cornwall	36	13	35.2	8.5	31.6
North Devon	41	15	35.3	7.6	30.2
Penwith	30	6	20.0	7.0	22.1
Plymouth	111	33	29.7	3.1	30.6
Restormel	45	15	32.8	7.3	35.3

Source: Local Labour Force Survey 2004/05 – Learning Skills Council – Qualifications of economically active adults and adults of working age 2004/2005

NUMBERS OF ECONOMICALLY ACITVE ADULTS IN DEVON AND CORNWALL WITHOUT A LEVEL 2 (Table 2)		
Area	**Economically Active Adults (000's)**	**Economically Active Adults without a level 2 (000's**
Cornwall	**232**	**60**
Caradon	37	10
Carrick	41	7
Kerrier	43	10
Penwith	30	6
Plymouth	111	33
Restormel	45	15

Source: Local Labour Force Survey 2004/05 – Learning Skills Council – Qualifications of economically active adults and adults of working age 2004/2005

HIGHEST LEVEL OF QUALIFICATIONS OF ADULTS OF WORKING AGE 2004/2005 (Table 3 – part1)					
		Working age qualifications to at least Level 4			
	Pop'n	**2004/05**		**2003/04**	
AREA	**000's**	**000's**	**%**	**CI (%)**	**%**
England	30,360	7,872	25.9%	0.2%	25.0%
South West	2,950	770	26.1%	0.7%	26.1%
Devon and Cornwall	926	206	22.2%	1.2%	24.4%
Cornwall and Isles of Scilly LP	296	60	20.2%	2.3%	22.9%
Caradon	47	8	17.6%	5.3%	27.4%
Carrick	51	16	31.6%	6.6%	25.8%
Kerrier	55	9	16.8%	5.1%	22.9%
North Cornwall	48	8	15.8%	5.6%	17.4%
North Devon	50	9	17.9%	5.5%	22.5%
Penwith	37	7	18.3%	6.0%	21.8%
Plymouth	148	28	18.7%	2.3%	19.3%
Restormel	57	12	20.8%	5.6%	22.0%

Source: Local Labour Force Survey 2004/05 – Learning Skills Council – Qualifications of economically active adults and adults of working age 2004/2005

HIGHEST LEVEL OF QUALIFICATIONS OF ADULTS OF WORKING AGE 2004/2005 (Table 3 – part 2)					
		Working age qualifications to at least Level 3			
	Pop'n	2004/05		2003/04	
AREA	000's	000's	%	CI (%)	%
England	30,360	13,510	44.5	0.2	43.7
South West	2,950	1,377	46.7	0.8	46.4
Devon and Cornwall	926	405	43.8	1.4	45.0
Cornwall and Isles of Scilly LP	296	128	43.3	2.9	44.6
Caradon	47	21	44.0	6.9	50.1
Carrick	51	28	54.5	7.1	50.1
Kerrier	55	22	40.4	6.7	41.3
North Cornwall	48	18	38.2	7.5	39.4
North Devon	50	20	39.2	7.1	40.0
Penwith	37	17	44.7	7.7	43.1
Plymouth	148	59	40.0	2.8	41.0
Restormel	57	22	39.1	6.7	43.6

Source: Local Labour Force Survey 2004/05 – Learning Skills Council – Qualifications of economically active adults and adults of working age 2004/2005

HIGHEST LEVEL OF QUALIFICATIONS OF ADULTS OF WORKING AGE 2004/2005 (Table 3 – part 3)					
		Working age qualifications to at least Level 2			
	Pop'n	2004/05		2003/04	
AREA	000's	000's	%	CI (%)	%
England	30,360	20,028	66.0	0.2	65.3
South West	2,950	2,034	68.9	0.7	68.5
Devon and Cornwall	926	631	68.1	1.3	68.7
Cornwall and Isles of Scilly LP	296	206	69.6	2.7	69.3
Caradon	47	33	69.2	6.4	76.3
Carrick	51	40	77.2	6.0	74.5
Kerrier	55	40	71.8	6.1	67.5
North Cornwall	48	29	61.0	7.5	63.8
North Devon	50	32	63.5	7.0	68.2
Penwith	37	28	73.9	6.8	73.2
Plymouth	148	95	64.1	2.8	64.8
Restormel	57	37	65.5	6.5	62.8

Source: Local Labour Force Survey 2004/05 – Learning Skills Council – Qualifications of economically active adults and adults of working age 2004/2005

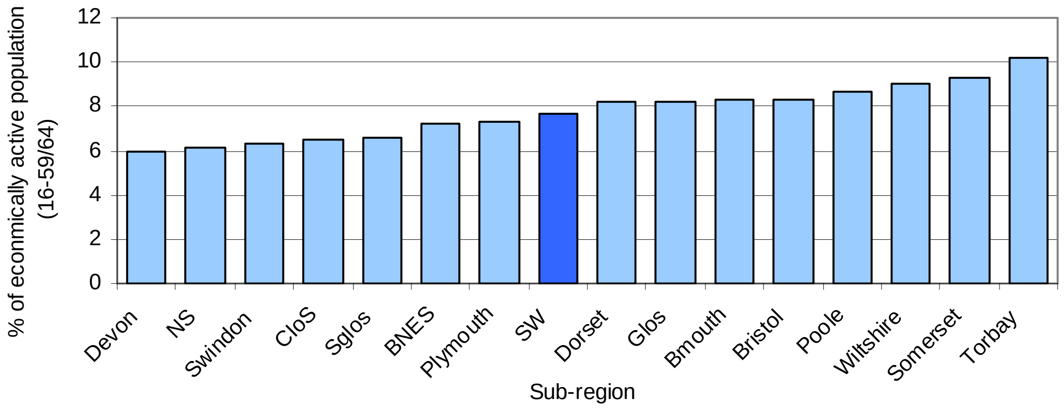
HIGHEST LEVEL OF QUALIFICATIONS OF ADULTS OF WORKING AGE 2004/2005 (Table 3 – part 4)					
		Working age without Level 2 qualification			
	Pop'n	2004/05		2003/04	
AREA	000's	000's	%	CI (%)	%
England	30,360	10,332	34.0	0.2	34.7
South West	2,950	916	31.1	0.7	31.5
Devon and Cornwall	926	295	31.9	1.3	31.3
Cornwall and Isles of Scilly LP	296	90	30.4	2.7	30.7
Caradon	47	15	30.8	6.4	23.7
Carrick	51	12	22.8	6.0	25.5
Kerrier	55	16	28.2	6.1	32.5
North Cornwall	48	19	39.0	7.5	36.2
North Devon	50	185	36.5	7.0	31.8
Penwith	37	10	26.1	6.8	26.8
Plymouth	148	53	35.9	2.8	35.2
Restormel	57	20	34.7	6.5	37.2

Source: Local Labour Force Survey 2004/05 – Learning Skills Council – Qualifications of economically active adults and adults of working age 2004/2005

NUMBERS OF ADULTS OF WORKING AGE IN DEVON AND CORNWALL WITHOUT A LEVEL 2 (Table 4)		
Area	**Adults or Working Age (000's)**	**Adults of working age without a Level 2 (000's)**
Cornwall	**296**	**90**
Caradon	47	15
Carrick	51	12
Kerrier	55	16
Penwith	37	10
Plymouth	148	53
Restormel	57	20

Source: Local Labour Force Survey 2004/05 – Learning Skills Council – Qualifications of economically active adults and adults of working age 2004/2005

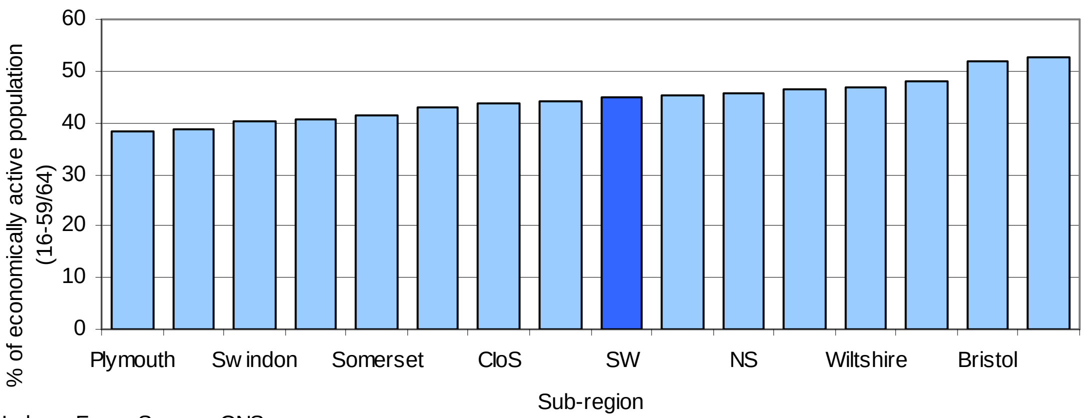
Proportion of Population with No Qualifications 2003



Labour Force Survey, ONS

Source: SW RDA RES Review 2005: Evidence Base

Proportion of Population with NVQ 3 Qualifications Or Above SOAs



Labour Force Survey, ONS

Source: SW RDA RES Review 2005: Evidence Base

PARTICIPATING IN LEARNING BY PEOPLE AGED 16 to 69 (Table 5- Part 1)				
Area	Aged 16-69	Aged 16-69 and participating in any learning		
	Number (000s)	Number (000s)	Percentage (%)	CI (%)
England	31,797	22,096	69.5	0.2
South West	3,144	2.300	73.2	0.7
Devon and Cornwall	999	709	71.0	1.2
Cornwall and Isles of Scilly LP	321	224	69.8	2.6
Caradon	51	35	68.9	6.1
Carrick	5.1	39	75.9	6.0
Kerrier	60	40	67.5	6.1
North Cornwall	53	33	62.3	6.9
North Devon	55	34	62.5	6.7
Penwith	41	30	73.1	6.6
Plymouth	153	109	71.2	2.6
Restormel	66	47	72.0	5.7

Source: Local Labour Force Survey 2004/05 – Learning Skills Council – Qualifications of economically active adults and adults of working age 2004/2005

PARTICIPATING IN LEARNING BY PEOPLE AGED 16 to 69 (Table 5 – Part 2)				
Area	Aged 16-69	Aged 16-69 and participating in any learning		
	Number (000s)	Number (000s)	Percentage (%)	CI (%)
England	31,797	15,444	48.6	0.2
South West	3,144	1,583	50.3	0.7
Devon and Cornwall	999	491	49.1	1.3
Cornwall and Isles of Scilly LP	321	154	48.1	2.8
Caradon	51	25	49.5	6.6
Carrick	5.1	27	53.4	7.0
Kerrier	60	25	42.6	6.4
North Cornwall	53	21	40.2	7.0
North Devon	55	25	45.2	6.9
Penwith	41	21	51.1	7.4
Plymouth	153	79	51.4	2.8
Restormel	66	34	52.2	6.3

Source: Local Labour Force Survey 2004/05 – Learning Skills Council – Qualifications of economically active adults and adults of working age 2004/2005

PARTICIPATING IN LEARNING BY PEOPLE AGED 16 to 69 COMPARED WITH 2004/05 (Table 6 – Part 1)				
	2004/05			
	Aged 16-69, participating in any learning		Aged 16-69, participating in taught learning	
AREA	**(000s)**	**(%)**	**(000s)**	**(%)**
England	22,096	69.5	15,444	48.6
South West	2,300	73.2	1,583	50.3
Devon and Cornwall	709	71.0	491	49.1
Cornwall and Isles of Scilly LP	224	69.8	154	48.1
Caradon	35	68.9	25	49.5
Carrick	39	75.9	27	53.4
Kerrier	40	67.5	25	42.6
North Cornwall	33	62.3	21	40.2
North Devon	34	62.5	25	45.2
Penwith	30	73.1	21	51.1
Plymouth	109	71.2	79	51.4
Restormel	47	72.0	34	52.2

Source: Local Labour Force Survey 2004/05 – Learning Skills Council – Qualifications of economically active adults and adults of working age 2004/2005

PARTICIPATING IN LEARNING BY PEOPLE AGED 16 to 69 COMPARED WITH 2004/05 (Table 6 – Part 2)				
	2004/05			
	Aged 16-69, participating in any learning		Aged 16-69, participating in taught learning	
AREA	**(000s)**	**(%)**	**(000s)**	**(%)**
England	23,935	75.9	18,829	59.7
South West	2,478	79.7	1,947	62.6
Devon and Cornwall	791	79.7	622	62.6
Cornwall and Isles of Scilly LP	255	78.9	195	60.5
Caradon	43	84.3	35	67.6
Carrick	44	78.2	35	62.0
Kerrier	48	79.9	36	60.1
North Cornwall	38	73.5	28	53.0
North Devon	43	80.2	36	66.5
Penwith	31	75.9	25	59.8
Plymouth	122	81.2	100	66.6
Restormel	50	80.7	37	60.3

Source: Local Labour Force Survey 2004/05 – Learning Skills Council – Qualifications of economically active adults and adults of working age 2004/2005

Key Points on Productivity in Cornwall (with reference to the following three tables relating to training statistics)

That Cornwall is characterised by the following:

- Lower than average productivity and low wage economy
- Rural region of high environmental quality
- Issues are varied and include housing, transport and others.
- Divergent sub regional performance in the SW – the issues above become greater the further west we go.

Although the economic performance (GDP per capita) in the SW is below the national average, if you exclude London the performance of the SW is on par with the rest of the Country. However Cornwall still has the lowest productivity in the South West.

Issues relating to the low productivity and low wages in Cornwall:

- Empirically the lower wages and productivity of Cornwall are related to lower than average skills of employed workers.
- There are high skilled people but they are not in work – there is underemployment of these skills – poor matching of skills to jobs.
- Hi-tech businesses are more productive but Cornwall does not have these businesses.
- There is an empirical relationship between regions having hi-tech industries and a high skilled workforce.
- Lack of large cities – cities are engines of economic activity. It is difficult for regions without large cities to match the performance of more urbanised areas.
- Average wages, skill levels and payments to skills all decline with increasing remoteness from main population centres.
- There is a strong positive relationship between labour market size and average wages.
- A large labour market size improves the quality of matches between workers and jobs.
- Rurality leads to a small labour market and relatively low levels of workforce mobility even at the local scale.

TRAINING STATISTICS						
	Average est. size (no. of employees)	% of employees receiving any training	% of employees receiving on- the job - training	% of employees receiving off- the-job training	% of employees receiving supervisory of man-training	% of employees awarded or working towards a formal qualification
1-10 emps. (792)	5	44	38	23	8	13
11-24 emps. (388)	17	57	48	48	6	11
25-99 emps. (563)	43	59	51	31	5	9
100-199 emps. (119)	122	63	45	22	5	8
200+ emps. (109)	799	38	34	28	3	7
Agriculture, forestry, fising (255)	3	26	16	10	3	7
Manufacturing (276)	18	32	30	12	3	4
Construction (206)	7	38	28	21	2	16
Wholesale/retail (304)	8	52	49	27	9	5
Hotels/restaurants (220)	9	34	33	9	4	22
Transport/communications (116)	13	27	41	30	5	7
Financial Services (50)	8	48	43	18	9	10
Business Services (105)	9	42	33	27	6	8
Public Sector (376)	32	60	48	37	5	12
Other Services (88)	5	62	48	32	5	9
All (1971)	11	48	41	26	6	10

Source: Learning Skills Council for Devon & Cornwall 2003

TRAINING STATISTICS FOR LSC PRIORITY SECTORS				
SECTOR	% of Establishments Training	% of Employees Receiving Training	% Reporting a Skills Gap	% Reporting Recruitment Difficulties
Agriculture (71)	26	26	4	67
Manufacturing (276)	48	32	19	44
Construction	55	38	10	87
Retail (185)	44	56	11	38
Tourism	56	44	16	48
Health and Social Care	85	52	10	62
All	53	48	13	57

Source: Learning Skills Council for Devon & Cornwall 2003

EMPLOYERS TRAINING AND USING EXTERNAL PROVIDERS		
	% of establishments training	**% of establishments using an external provider**
1-10 emps. (792)	49	552
11-24 emps. (388)	75	78
25-99 emps. (563)	82	77
100-199 emps. (119)	82	73
200+ emps. (109)	74	74
Agriculture, forestry, fising (255)	26	66
Manufacturing (276)	68	71
Construction (206)	55	81
Wholesale/retail (304)	47	43
Hotels/restaurants (220)	43	52
Transport/communications (116)	63	48
Financial Services (50)	52	49
Business Services (105)	59	58
Public Sector (376)	82	81
Other Services (88)	68	63
All (1971)	**53**	**60**
Figures In Parentheses Denote Un-weighted Sample Bases		

Source: Learning Skills Council for Devon & Cornwall 2003

- **Knowledge Economy**

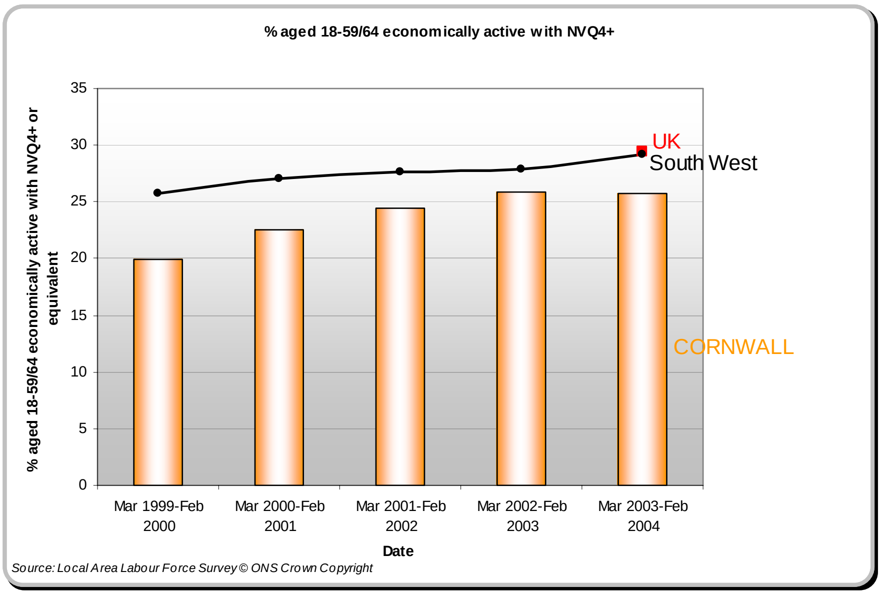
The LINC organisation within Cornwall County Council have suggested the following range of indicators (shown in the table below) that could be used to measure the “Knowledge economy” in Cornwall.

Several of these indicators are within other areas of this document and are not reproduced again (e.g. level of business V.A.T. registration statistics) others are in the process of being developed and are as such work in progress (e.g. level investment in research and development) and several are reproduced below.

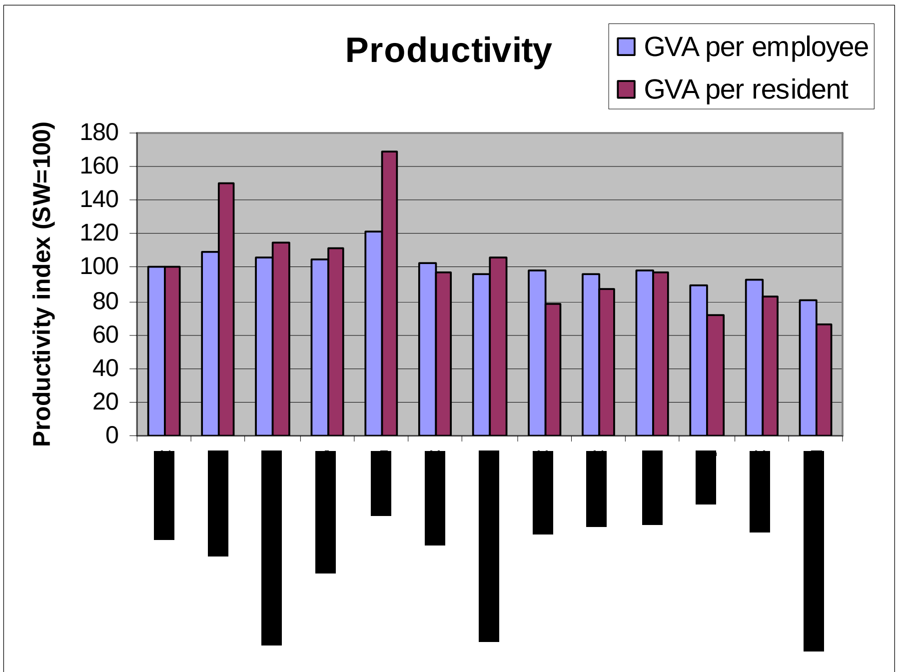
Theme	Indicator	Description	Spatial coverage	Temporal coverage	Source	Caveats
Productivity	GVA per head of working population	Measures the value added to the economy per person working in the economy. Preferred over total GVA as this cannot be compared to other economies and also accounts for population increases that will naturally increase total GVA.	Districts Cornwall & IoS All other UK counties SW UK	Yearly 1991-2003	ONS & Local GVA model	Discepancy between the 2 sources due to bottom up – top-down approach.
Innovation	R&D spend as a % of total expenditure	Business spend on R&D. R&D definition is taken from the Organisation for Economic Coorporation and Development (OECD) – “Creative work undertaken on a systematic basis in order to increase the stock of knowledge of man, culture, and society and use of this stock of knowledge to devise new applications”.	Cornwall & IoS SW UK	Yearly 1995-2003	Business Monitor Survey, ONS	Survey based, need to ensure county-level data is robust.
High level skills	%18-59/64 economically active population qualified to NVQ4+	High level skills of workforce. Indicates the of use of knowledge and skills in business.	Districts Cornwall & IoS All other UK counties SW England GB	Yearly 1999-2003	Local Area Labour Force Survey, ONS	Again, survey based, but offical governement statistics
Globalisation	Exports as a % of expenditure/ turnover (?)	Indicates the competitiveness of local businesses and their ability to perform in a national and international market. Higher value in exports due to larger potential customer base, but depends on product./service.	?	?	?	
ICT	Broadband coverage/ effective use of	Broadband as an enabler for the knowledge economy. Exchange of knowledge and national/international competitiveness.	Coverage by exchange.	Snapshot?	ActNow	
Business churn	VAT business start-up and closures or Barclays startup rate	Both indicators highlight the potential pool for business successes. In theory, the greater the pool the stronger the business	VAT= Districts Counties SW	Yealy 1994-2003	ONS	Cornwall is a startup hotspot, consistently appearing in Barclays top 10

		population...survival of the fitest etc.	UK			authorities outside London. However, we are the worst performing economy, therefore, we have to be careful about making a direct link between startups and economic development.

Indicator 3 – High Level Skills



Source: LINC – Local Intelligence Network Cornwall



Source: ONS/Nomis & University of West of England

SECTORS & AREAS

- **The Primary Production Sector**

THE PRIMARY PRODUCTION SECTOR Share of total and annual rate of growth 1993 - 2003		
	Share in 2003	**% per annum 1993-2003**
Agriculture	20.6	-3.5
Fishing	2.8	1.9
Mining & Quarrying	11.9	-0.3
Electricity, Gas & Water	5.2	-0.9
Construction	59.6	7.6
Total	100.0	2.5

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 10)

This sector, consisting, for the purposes of analysis, of agriculture and forestry, fishing, mining and quarrying, electricity, gas and water and construction, accounted for 11.5 % of the total Cornwall economy in 2003. As the following table (Table 10) shows, the sector's overall rate of growth between 1993 and 2003, at 2.5 % per annum, was less than that for the Cornwall economy as a whole (7.5 % per annum), but this was mainly the outcome of declines in agriculture and energy supply accompanied by a strong rise in construction output.

- **Agriculture and Forestry (may be moved to a more appropriate place)**

Although the Cornwall economy is perceived to be a 'rural' economy, the sector's contribution to the total economy is still small. Compared with the national economy when the sector accounted for 0.9 % in 2003, the county proportion was 2.4 %; double the national figure but still low. Even in North Cornwall, which has the highest percentage, the figure for 2003 was only 4.0%.

Historically the unique features of Cornwall have created the staple economic activities of the county: an agriculture sector which even now represents a much higher share of the economy than elsewhere, a fishing industry which includes a port with one of the largest value of fish landings in the country, a mining and quarrying sector, a maritime manufacturing sector, and a substantial tourist sector

Agriculture Output

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Chart 3)

As the chart above shows, the sector has had a roller-coaster ride over the decade. Output, which peaked in 1995, fell drastically to 1998 and although there has been some recovery since, the 2003 level is still below that of 1993. The rates of growth, in fact, were a fall of 17.0% per annum between 1993 and 1998, followed by a rise of 12.4% per annum between 1998 and 2003 giving an overall decline in the rate of growth for the decade 1993 to 2003 of 3.5% per annum.

The decline was shared equally across all districts (see Tables 12 and 13). The decline was reflected in other key indicators over the period. Numbers of employees fell by 3.7% per annum, self-employed (farmers) by 1.9% per annum and net farm income by 7.4% per annum.

Agricultural Holdings by Farm Type, June 2004 (% and '000s) Part 1					
	Cereals	**General Cropping**	**Horticulture**	**Pigs and Poultry**	**Dairy**
ENGLAND	11.9	4.9	5.0	4.0	6.9
SOUTH WEST	6.3	1.3	4.9	3.4	9.9
Bath & NE Somerset	6.3	0.8	5.0	3.8	9.0
Bournemouth	0.0	0.0	36.4	9.1	9.1
Bristol	0.0	0.0	10.5	0.0	0.0
N. Somerset	3.5	0.4	6.6	2.8	9.1
Plymouth	4.0	2.0	4.0	4.0	6.0
Poole	3.7	3.7	14.8	3.7	0.0
S. Gloucestershire	7.7	0.8	4.4	3.6	11.2
Swindon	18.6	0.8	2.5	3.0	8.9
Torbay	1.3	2.5	11.4	2.5	2.5
Cornwall & Isles of Scilly	3.6	2.5	5.9	3.1	9.9
Devon	4.6	0.9	4.4	3.6	10.1
Dorset	7.6	0.8	4.1	4.2	12.6
Gloucestershire	10.3	1.2	6.2	3.1	6.4
Somerset	4.8	5.2	10.9	46.9	1.2
Wiltshire	15.1	1.0	2.6	3.5	8.9

Agricultural Holdings by Farm Type, June 2004 (% and '000s) Part 2					
	Cattle and Sheep (LFA[1])	**Cattle and Sheep (lowland)**	**Mixed**	**Other**	**Total holdings (inc. part 1) (=100%)**
ENGLAND	5.9	18.7	5.7	37.2	192,876
SOUTH WEST	4.2	23.8	6.0	40.3	48,601
Bath & NE Somerset	0.0	26.8	5.8	42.6	847
Bournemouth	0.0	18.2	9.1	18.2	11
Bristol	0.0	25.0	7.9	56.6	76
N. Somerset	0.0	29.2	3.7	44.8	977
Plymouth	0.0	30.0	4.0	46.0	50
Poole	0.0	25.9	14.8	33.3	27
S. Gloucestershire	0.0	21.3	5.6	45.3	1,059
Swindon	0.0	19.1	6.8	40.3	236
Torbay	0.0	27.8	7.6	44.3	79
Cornwall & Isles of Scilly	5.6	22.2	7.7	39.4	9,032
Devon	8.3	22.9	6.3	39.0	15,098
Dorset	0.0	26.6	5.2	38.8	4,100
Gloucestershire	0.0	25.2	6.0	41.5	4,814
Somerset	0.8	2.3	3.5	24.2	8,303
Wiltshire	0.0	23.6	5.8	39.4	3,892

[1]LFA - Less Favoured Areas
 # data suppressed. Percentages shown are proportions of the total for available data.
Source: June Agricultural Census, 2004, DEFRA - (SW Regional Development Agency – Sub-regional Indicators July 2005)

- **Food Production, processing and distribution in Cornwall**

Characteristics of the Cornish Food Economy

The total value of the food economy has been previously estimated at being worth £800 million per annum to Cornwall[1]. Our estimates of the food economy now indicate that it is worth in excess of £1 billion per annum.

These remain as estimates because of the complexity and diversity of food in the economy in Cornwall. The tables below indicate how we have derived these figures and the composition of the economy.

The food processing and manufacturing sector is economically the most important sector in the Cornish food economy which our estimates show is worth at least £500 million.

As shown in Table 1 below the sector is dominated by a small group of very large processors and manufacturers who supply the national and international market. Equally, they draw in supplies and services from across the UK although their direct and indirect contribution to the Cornish economy through sourcing, employment and services is considerable.

All of these processors supply the local food economy in Cornwall indirectly as their products are stocked by all the major multiple retailers and many other large retail stores.

These major processors directly employ over 2,500 people in Cornwall.

Table 1 - Major Food Processors and Manufacturers with Operations in Cornwall 2002

Company or Group	Turnover
Yoplait Dairy Crest Group Davidstow plant	£ 793.7 million £ 140 million*
Samworth Brothers Ginsters Kensey Foods Tamar Foods	£250+ million £110 million* £30 million £ X million
Flagship Foods Roach Foods	£303 million £150 million#
St Merryn Meat	£319 million[$]

Sources: Dairy Crest Annual Report, Samworth Brothers Website, KPMG/Sunday Times

*Estimate through calculation.
figure for plants in both Devon and Cornwall.
[$] St.Merryn is headquartered in Bodmin but has plants in Wales and Portugal that are included in this figure.

[1] A figure calculated by Prosper in 1998.

The second most important sector to the Cornish food economy is that of agricultural production in the County, which is worth at least £192 million.

Agricultural production is highly diverse and characterised by a multitude of small enterprises with a number of medium sized enterprises in particular sectors.

Agricultural producers directly employ over 10,000 people, many of whom are stakeholders in the businesses in which they work.

Economically the most important industry within this sector is the Dairy industry, which is the foundation of one of the major food processors (Davidstow) and a wealth of smaller businesses.

Although some of the businesses in this sector have international links, the majority are embedded in the Cornish and, more generally, the regional economy.

Table 2 - Monetary Value of the different Agricultural Sectors in Cornwall[2]

Crops[3]	*Value to Cornwall*
Other arable crops	£900,000
Potatoes	£10,100,000
Horticulture	£18,500,000
Livestock	
Beef	£31,600,000
Dairy	£92,300,000
Sheep	£10,100,000
Pigs	£5,400,000
Poultry	£5,600,000
Total from Crops	**£28,600,000**
Total from Livestock	**£145,000,000**
Total Value of Farm Produce	**£173,600,000**

Source - Centre for Rural Research, University of Exeter - 2003 from DEFRA data

[2] These figures are based on Farm Gate values, based on the per hectare figure calculated at UK national averages.
[3] These figures excluded cereals, which if they were sold as food for humans would be worth £18,400,000 but we believe the overwhelming majority are used as animal feed.

The third most important sector of the Cornish Food Economy is the retail and hospitality sector. This sector is the most complex and opaque area to analyse as it includes both the permanent population of Cornwall and the visitor population.

In 1999 over 71% of 270,000+ visitors to the County stayed in self-catering accommodation, meaning that they had to either seek food in restaurants or purchase it locally[4]. This is reflected in the average spend per week by visitors of £108 on accommodation and £100 on other services. There are approximately 485 restaurants in Cornwall.

It has not been possible to disaggregate the food retailing figures between residents and visitors but, as the population of Cornwall doubles during high season, it must have a considerable impact on food retailing in the County. As with the rest of the UK the multiple retailers dominate food retailing in Cornwall.

[4] Cornwall County Council

- **Fishing**

The following are extracts from the Socio-Economic Baseline of the South West Fishing Industry March 2003 EKOS Consulting & Nautilus Consultants

Definition of the Fishing industry

For the purposes of this exercise the fishing industry can be described as primary and secondary activities relating to fish. This sector, therefore, includes fishermen and their vessels, as well as associated industries including:

Downstream:

Fish processors;
Fish merchants;
Retail and Catering;
Mariculture.

Upstream:

Boat builders;
Net and equipment makers;
Marine engineers;
Electrical equipment suppliers;
Fuel suppliers.
Overview of the South West Fishing Industry

The South West fishing industry is estimated to be worth £244 million and accounts for approximately 1,332 direct and 2,013 indirect jobs. Spend by direct and indirect employees helps to support a further 614 induced jobs in the local economy.

A total of £72.4 million worth of fish was landed in South West ports in 2001. This is equivalent to 0.11% of the Gross Domestic Product of the region.

If the value added to these landings by downstream businesses (merchants, processors, retail and catering etc.) (£171.8 million) are added to the total it can be estimated that the total contribution of fishing to the regional economy is £244 million. This represents 0.38% of the SW GDP.

The Fishing Fleet

The South West fishing fleet is made up of 1,149 vessels. Of these, 299 are over 10 metres and 850 are under 10 metres (70% of which are active).

In general, the fishing fleet can be described as ageing, with a greater number of vessels (164) having been built before 1975 than in the past 26 years (158).

Of the over 10 metre vessels there are 69 beam trawlers, 72 trawlers, 51 potters and 33 netters. The main methods of fishing used by under 10 metre vessels are pots/lines/nets (123), potting and netting (58) and handlines (78).

The total insurance value of the fleet is estimated to be £103.6 million. The over 10m fleet makes up 75% of this total.

Landing Trends

2001 landings totalled **56,773 tonnes** with a first-hand sales value of **£72.4 million**. Of this total, 13.8 million came from recorded landings by under 10m vessels and 57.6 million from UK vessels over 10m (nearly 80%).

Objective One area

Based on vessel numbers and type it can be estimated that there are 1082 fishermen in Cornwall and the Isles of Scilly[5]. Of this total, there are 930 active fishermen and 754 FTE fishermen. This represents 56% of the regional total. A large majority of these jobs are based in Newlyn (438), where the beam trawl fleet (159 employees) is a major employer. In addition, many small ports such as, Looe (80 fishermen), Mevagissey (69), Padstow (42) and St.Ives (57), still have significant numbers of fishermen, many of whom own their vessels. A large proportion of fishermen are employed in the beam trawl fleet (171 fishermen). A majority of the remaining fishermen are employed on under 10 metre vessels practicing a variety of different fishing methods.

In 2001, 17,883 tonnes of fish was landed in Cornwall and the Isles of Scilly, with a total value of £33.7 million[6]. This represented 0.7% of the Objective One area's GDP, which was estimated to be £4,876 million in 2001[7].

In 2001 there were a total of 559 fishing vessels registered in the Objective One area. This is split up between 425 under 10 metre vessels (50% of the SW fleet) and 174 over 10 metre vessels (58% of the SW fleet).

A large majority of the over 10 metre fleet is based in Newlyn (72 vessels). Other ports with significant numbers of over 10 metre vessels include Looe (18), Newquay (16), Hayle (13) and Padstow (13). Similarly, the largest concentration of under ten metre vessels is found in Newlyn (72). However, Mevagissey (68) and St.Ives (42) still have significant fleets.

From discussions with the industry, it is estimated that sales are apportioned to the following markets:

Export: 51%
SW processors: 29%
SW retail and catering sector: 7%
UK market outside the SW: 13%

[5] Nautilus estimates
[6] Lee.D (2001) UK Sea Fisheries Statistics, DEFRA
[7] EKOS estimate based on ONS GDP trends, 1994-1998

Fishing Dependent Wards

The following wards have been determined as being fishing dependent based on the size of their fishing fleets:

Table 8.1: Objective 1 Area – FDA Wards		
Port	**Ward**	**Fishing fleet**
Cadgwith	Cadgwith	8
Falmouth	Arwenack	17
Hayle	Gwithian	20
Helford River	Meneage	10
Looe	Looe	42
Mevagissey	Mevagissey	72
Mullion	Mullion	3
Newlyn	Penzance South	143
Padstow	Padstow and St.Merryn	23
Porthleven	Porthleven	23
Sennen	St.Buryan	5
St.Ives	St.Ives South	48

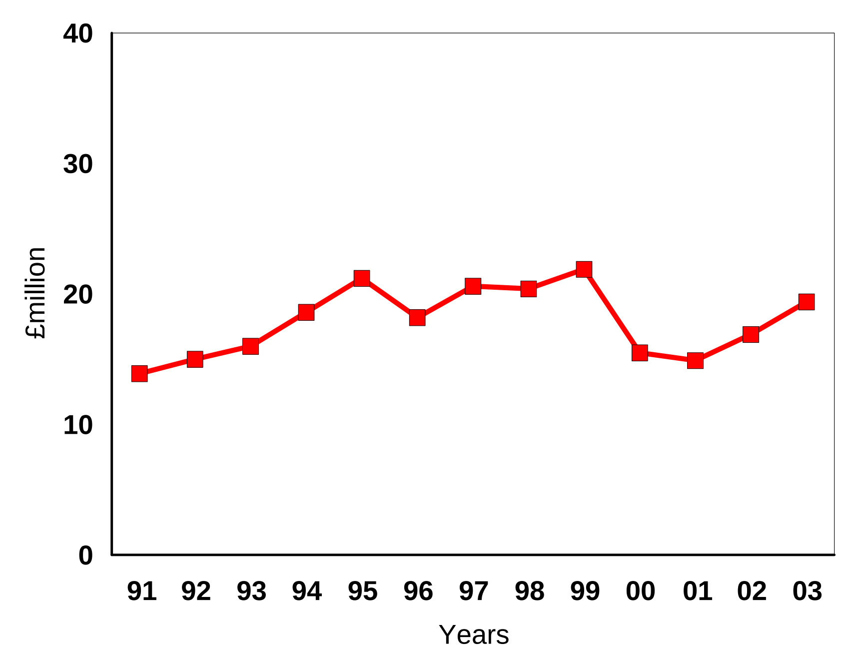
Table 8.6: Fish sector as part of the total workforce (Objective 1)						
	Ward	**Total employment**	**Fishermen**	**Upstream employment**	**Downstream employment**	**Fish Sector as a % of total employment**
Cadgwith	Cadgwith	300	11	0	0	3%
Falmouth	Arwenack	800	21	37	46	13%
Hayle	Gwithian	1500	36	1	8	3%
Helford River	Meneage	800	14	37	0	6%
Looe	Looe	1400	80	20	43	10%
Mevagissey	Mevagissey	600	69	2	3	12%
Mullion	Mullion	600	4	0	0	0.6%
Newlyn	Penzance South	700	438	33	120	84%
Padstow	Padstow and St.Merryn	1300	42	9	36	6%
Porthleven	Porthleven	500	31	7	11	10%
Sennen	St.Buryan	600	6	0	0	1%
St.Ives	St.Ives South	1700	57	0	13	4%

Total Employment data is sourced from Nomis, 2002

Objective 1 - Cornwall	fishing	upstream	downstream	Total
Boscastle	1	0	6.4	7.4
Cadgwith	11	0	0	11
Cape Cornwall	3	0	0	3
Cawsands	10	0	0	10
Charlestown (St. Austell)	4	2	12	18
Coverack	11	0	0	11
Downderry	5	0	0	5
Falmouth	21	37	45.9	103.9
Flushing	6	0	0	6
Fowey/Poluran	6	21	7.8	34.8
Gillan	2	0	0	2
Gorran Haven	4	0	0	4
Hayle	36	1	8.5	45.5
Helford	14	0	0	14
Kilcobben Cove	1	0	0	1
Lamorna	1	0	0	1
Lizard	2	0	0	2
Loe Beach/Feock	2	0	0	2
Looe	80	20.5	43.2	143.7
Mevagissey	69	2.5	3.2	74.7
Millbrook	8	0	0	8
Mousehole	12	0	0	12
Mullion	4	0	0	4
Mylor	12	0	0	12
Newlyn	438	33	120.2	591.2
Newqay	33	0.5	0	33.5
Padstow	42	9	36	87
Par	1	1	0	2
Penberth	6	0	0	6
Penryn	7	12	0	19
Penzance	11	15.5	64.6	91.1
Polperro	22	0	0	22
Port Gaverne	1	0	0	1
Port Isaac	3	0.5	8	11.5
Port Quin	14	0	0	14
Porthallow	5	1	0	6
Portheras Cove	1	0	0	1
Porthgwarra	1	0	0	1
Porthleven	31	7.5	11	49.5
Porthoustock	9	0	0	9
Portloe	7	0	0	7
Portreath	14	0	5	19
Portscatho	1	0	0	1
Portwrinkle	3	0	0	3
Sennen Cove	6	0	0	6
St Agnes	3	0	1	4
St Ives	57	0	13.4	70.4
St Mawes	15	0	15	30
St Michael's mount	2	0	0	2
Torpoint	2	6.5	35.6	44.1
Inland Cornwall	0	15	31.2	46.2
Total C	1082	185.5	468	1735.5
Total SW	1990	392.6	1451	3833.6

Fishing activity is concentrated in Newlyn, where the value of landings of fish was £17.7 million in 2003, followed by Falmouth, where the value of landings in 2003 was £2.8 million, Looe (£2.5 million) and Padstow (£1.7 million). As the following chart (Chart 4) shows, there has been little variation in output over the whole period, although, as the following table (Table 11) shows, the composition of the catch has changed considerably.

OUTPUT OF THE FISHING SECTOR



Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Chart 4)

CHANGE IN COMPISITION OF VALUE OF CATCH 1993-2003				
	CORNWALL			
	£m 1993	% 1993	£m 2003	% 2003
Demersal (live in deep water or near the seabed, e.g. cod, haddock and plaice)	18.7	90.4	18.6	75.0
Pelagic (live near the surface of the sea, e.g. tuna, mackerel and pilchard)	0.7	3.2	0.8	3.1
Shellfish	1.3	6.3	5.4	21.9
Total	20.7	100.0	24.8	100.0

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 11)

Growth over the period 1993 – 2003 has been modest at 1.9%.

Malcolm to reduce the information here to something more simple and relevant

STATISTICS OF FISH LANDINGS IN EWNI BY PORT 2003

Quantity and Value of Fresh and Frozen Fish landed by UK Vessels in 2003 (Live weight)

		Total East Coast Ports		Total South Coast Ports		Total West Coast and Wales Ports		Total England and Wales	
		Quantity (tonnes)	Value (£)	Quantity (tonnes)	Value (£)	Quantity (tonnes)	Value (£)	Quantity (tonnes)	Value (£)
	Bass	44	224,406	464	2,542,772	64	353,346	573	3,120,524
	Blue Ling	6	3,699	..	1,172	1	940	7	5,812
	Bream	-	-	12	8,892	1	1,126	12	10,018
	Brill	14	49,356	283	1,447,760	47	172,788	344	1,669,903
	Catfish	89	81,376	-	-	-	-	89	81,376
	Cod	5,411	6,842,980	524	897,130	179	272,968	6,115	8,015,215
	Conger Eel	..	433	172	116,925	57	43,229	230	160,650
	Dabs	22	17,322	107	62,166	18	5,438	146	84,926
	Dogfish	61	70,518	363	272,753	540	470,714	964	814,191
	Flounders	11	4,583	81	22,987	56	12,438	147	40,008
	Gurnard	241	59,455	669	564,550	152	67,421	1,061	691,426
	Haddock	2,160	1,589,372	287	329,615	116	106,209	2,566	2,027,048
	Hake	2	2,669	633	1,305,605	503	962,320	1,145	2,282,789
	Halibut	32	172,865	1	2,141	..	51	32	175,058
	Halibut-Mock	525	2,201,420	-	-	-	-	525	2,201,420
	Lemon Sole	354	691,285	936	4,032,999	52	139,492	1,342	4,866,087
	Ling	58	42,069	438	344,612	98	87,230	593	473,990
	Megrims	1	2,011	1,098	3,106,076	291	631,697	1,396	3,747,533
	Anglerfish	104	187,218	2,192	4,693,329	374	812,552	2,676	5,699,325
	Mullet	17	52,827	228	781,318	4	4,525	249	838,670
	Plaice	698	824,350	1,887	3,000,566	410	436,053	2,995	4,261,355
	Pollack	102	81,842	1,014	1,995,521	301	405,459	1,418	2,482,846
	Redfish	380	2,352,707	2	1,229	..	64	382	2,354,001
	Saithe	549	242,221	64	65,779	31	20,083	644	328,134
	Sandeels	..	40	-	-	-	-	..	40
	Sharks	1	823	55	81,593	19	12,864	75	95,281
	Skate/Rays	416	524,610	1,050	1,055,310	1,369	1,624,983	2,836	3,206,357
	Sole	191	1,076,347	1,860	11,606,074	230	1,422,455	2,282	14,104,875
	Torsk	4	1,915	-	-	..	112	4	2,026
	Turbot	35	204,649	210	1,577,360	124	287,035	369	2,069,408
	Whiting	646	235,782	749	452,662	114	62,170	1,512	752,264
	Blue Whiting	-	-	-	-	-	-	-	-
	Whiting-Pout	7	2,245	654	128,554	5	1,381	666	132,179
	Witches	37	21,235	27	42,583	28	33,271	93	97,606
	Roes	25	44,365	19	22,965	3	5,293	47	72,623
	Other Demersal	71	65,670	557	1,037,071	108	137,488	738	1,243,213
Total	**Demersal**	**12,312**	**17,974,667**	**16,634**	**41,600,069**	**5,295**	**8,593,194**	**34,271**	**68,208,175**
	Herring	116	62,223	706	296,399	14	9,500	836	368,121
	Horse Mackerel	..	192	382	107,068	138	2,873	521	110,133
	Mackerel	7	5,914	5,602	2,274,270	297	126,616	5,907	2,406,800
	Pilchards	..	101	2,522	527,830	-	-	2,522	527,931
	Sprats	1,309	116,918	996	201,454	..	196	2,305	318,568
	Other Pelagic	6	11,339	33	38,282	-	-	-	-
Total	**Pelagic**	**1,439**	**196,686**	**10,242**	**3,445,303**	**449**	**139,185**	**12,091**	**3,731,553**
	Clams	-	-	637	191,492	..	34	637	191,525
	Cockles	12,473	3,327,198	1,061	1,048,741	13,223	12,476,213	26,757	16,852,152
	Crabs	6,287	6,019,611	6,541	6,931,221	1,256	1,257,053	14,084	14,207,991
	Lobster	468	4,143,625	247	2,388,304	277	2,774,293	992	9,306,222
	Mussels	712	337,074	1,225	98,000	263	59,194	2,199	494,268
	Nephrops	2,281	4,329,356	8	35,880	395	953,955	2,686	5,324,358
	Oysters	22	75,110	724	730,343	3	9,132	748	814,585

	Winkles	127	100,000	2	2,801	20	22,046	148	124,848
	Queens	..	160	..	96	2,590	979,969	2,590	980,226
	Scallops	555	473,879	7,225	10,843,200	814	1,407,865	8,595	12,726,929
	Shrimps/Prawns	604	985,418	..	654	51	100,357	655	1,086,429
	Squid	166	235,049	481	1,366,684	70	159,010	717	1,760,743
	Whelks	2,806	1,529,505	2,494	1,076,056	3,086	1,456,071	8,386	4,061,631
	Other Shellfish	1	873	5,139	4,393,733	32	181,099	5,172	4,575,905
Total	**Shellfish**	**26,502**	**21,556,858**	**25,784**	**29,107,206**	**22,078**	**21,836,292**	**74,368**	**72,507,812**
Total	**All Species**	**40,253**	**39,728,211**	**52,661**	**74,152,578**	**27,822**	**30,568,671**	**120,730**	**144,447,539**

Source: Fisheries Statistics Unit – Whitehall - London

STATISTICS OF FISH LANDINGS IN EWNI BY PORT 2003

Quantity and Value of Fresh and Frozen Fish landed by UK Vessels in 2003 (Live weight)

		Total Wales		Total England		Total Northern Ireland	
		Quantity (tonnes)	Value (£)	Quantity (tonnes)	Value (£)	Quantity (tonnes)	Value (£)
	Bass	20	101,993	552	3,018,531	9	32,127
	Blue Ling	1	940	6	4,871	-	-
	Bream	1	1,033	12	8,985	-	-
	Brill	6	23,601	338	1,646,302	33	127,808
	Catfish	-	-	89	81,376	-	-
	Cod	46	64,444	6,069	7,950,771	439	744,651
	Conger Eel	25	18,758	205	141,893	720	289,430
	Dabs	5	2,259	141	82,668	1	278
	Dogfish	246	222,609	717	591,582	1,644	1,546,540
	Flounders	3	1,438	144	38,570	-	-
	Gurnard	10	5,974	1,051	685,452	551	304,567
	Haddock	29	23,872	2,536	2,003,176	233	224,520
	Hake	474	891,418	671	1,391,370	268	705,165
	Halibut	-	-	32	175,058	..	107
	Halibut-Mock	-	-	525	2,201,420	-	-
	Lemon Sole	21	43,321	1,321	4,822,766	34	46,249
	Ling	35	28,528	558	445,462	94	51,769
	Megrims	289	627,186	1,108	3,120,347	6	6,123
	Anglerfish	327	714,513	2,349	4,984,812	193	347,106
	Mullet	3	2,566	246	836,104	-	-
	Plaice	65	66,788	2,930	4,194,566	87	79,607
	Pollack	52	64,879	1,365	2,417,966	236	351,337
	Redfish	..	51	382	2,353,949	74	3,746
	Saithe	4	2,555	640	325,579	237	94,503
	Sandeels	-	-	..	40	-	-
	Sharks	13	4,754	62	90,527	4	6,847
	Skate/Rays	301	340,005	2,535	2,866,352	715	694,318
	Sole	79	494,456	2,203	13,610,419	12	74,800
	Torsk	..	112	4	1,915	-	-
	Turbot	84	62,764	285	2,006,644	48	253,807
	Whiting	57	25,517	1,455	726,746	135	75,056
	Blue Whiting	-	-	-	-	-	-
	Whiting-Pout	1	230	665	131,949	..	342
	Witches	24	31,124	69	66,481	70	37,965
	Roes	..	230	47	72,393	1	2,033
	Other Demersal	80	88,960	657	1,154,253	93	57,429
Total	**Demersal**	**2,302**	**3,956,878**	**46,549**	**74,388,839**	**5,934**	**6,158,230**
	Herring	14	9,500	822	358,621	2,504	250,940
	Horse Mackerel	..	44	521	110,089	933	104,211
	Mackerel	..	202	5,906	2,406,598	2,073	743,316
	Pilchards	-	-	2,522	527,931	208	7,488
	Sprats	-	-	2,305	318,568	592	55,290
	Other Pelagic	-	-	-	-	-	-
Total	**Pelagic**	**14**	**9,745**	**16,029**	**4,241,625**	**6,310**	**1,161,245**

	Clams	-	-	637	191,525	-	-
	Cockles	1,485	2,090,135	25,272	14,762,017	-	-
	Crabs	710	715,532	13,374	13,492,458	606	503,680
	Lobster	109	1,195,746	883	8,110,476	15	156,379
	Mussels	-	-	2,199	494,268	57	23,500
	Nephrops	63	240,651	2,623	5,083,707	4,366	6,652,109
	Oysters	3	9,132	745	805,453	-	-
	Winkles	20	22,046	129	102,801	83	65,000
	Queens	1,133	431,623	1,457	548,603	251	114,860
	Scallops	301	512,614	8,295	12,214,315	506	655,639
	Shrimps/Prawns	..	1,096	655	1,085,333	-	-
	Squid	18	21,002	699	1,739,742	83	181,606
	Whelks	2,925	1,364,301	5,461	2,697,331	-	-
	Other Shellfish	29	167,242	5,143	4,408,663	..	94
Total	**Shellfish**	**6,796**	**6,771,120**	**52,878**	**52,257,588**	**5,968**	**8,352,867**
Total	**All Species**	**9,112**	**10,737,744**	**116,206**	**129,995,990**	**18,211**	**15,672,342**

Source: Fisheries Statistics Unit – Whitehall - London

STATISTICS OF FISH LANDINGS IN DEVON AND CORNWALL BY PORT 2003

Quantity and Value of Fresh and Frozen Fish landed by UK Vessels in 2003 (Live weight)

	Brixham		Plymouth		Looe		Polperro	
	Quantity (tonnes)	Value (£)	Quantity (tonnes)	Value (£)	Quantity (tonnes)	Value (£)	Quantity (tonnes)	Value (£)
Bass	28	206,029	141	807,177	15	87,063	12	68,631
Blue Ling	..	1,127	-	-	-	-	-	-
Bream	9	4,417	..	36	-	-	-	-
Brill	166	867,542	19	90,517	3	14,583	..	1,582
Catfish	-	-	-	-	-	-	-	-
Cod	40	69,130	20	30,328	17	23,474	2	2,392
Conger Eel	27	22,013	14	11,557	13	9,481	1	675
Dabs	59	40,649	5	2,496	3	1,336	..	122
Dogfish	84	57,385	40	34,079	..	140	..	21
Flounders	29	9,239	4	1,156	6	2,296	..	99
Gurnard	477	341,657	17	8,343	3	1,173	2	1,042
Haddock	18	26,141	14	17,268	7	6,647	3	2,997
Hake	3	6,594	6	7,778	2	2,512	..	598
Halibut	..	3	-	-	-	-	-	-
Halibut-Mock	-	-	-	-	-	-	-	-
Lemon Sole	308	1,272,434	85	434,547	152	725,739	20	98,603
Ling	33	28,936	19	12,402	10	7,424	2	1,464
Megrims	3	5,073	16	10,820	..	153	..	154
Anglerfish	297	432,309	180	458,009	106	263,291	13	32,479
Mullet	77	299,858	6	26,696	3	10,535	..	1,438
Plaice	852	1,441,108	129	184,860	45	63,820	4	5,497
Pollack	93	407,666	65	54,513	31	23,555	2	1,562
Redfish	-	-	..	78	-	-	-	-
Saithe	..	289	..	34	..	129	-	-
Sandeels	-	-	-	-	-	-	-	-
Sharks	1	1,586	19	13,716	..	96	..	8
Skate/Rays	172	86,345	47	58,241	15	15,969	1	1,144
Sole	673	4,567,955	169	1,178,259	7	48,193	1	5,860
Torsk	-	-	-	-	-	-	-	-
Turbot	68	463,827	12	89,822	10	74,564	..	854
Whiting	227	101,270	73	48,367	126	84,771	16	10,558
Blue Whiting	-	-	-	-	-	-	-	-
Whiting-Pout	514	92,897	16	4,551	12	4,407	3	858
Witches	..	143	..	450	..	3	..	2
Roes	2	1,647	2	2,813	3	1,621	..	30
Other Demersal	50	159,956	51	76,330	39	77,267	7	14,522

Total	**Demersal**	**4,310**	**11,015,223**	**1,169**	**3,665,244**	**627**	**1,550,244**	**92**	**253,189**
	Herring	12	6,999	585	227,016	1	524	..	5
	Horse Mackerel	14	4,804	322	87,055	1	164	..	7
	Mackerel	33	13,484	4,557	1,447,204	580	404,215	5	3,853
	Pilchards	1	621	2,483	500,753	..	40	-	-
	Sprats	147	29,443	109	24,305	-	-	-	-
	Other Pelagic	1	248	24	32,271	..	2	-	-
Total	**Pelagic**	**208**	**55,599**	**8,080**	**2,318,604**	**582**	**404,945**	**5**	**3,865**
	Clams	-	-	-	-	-	-	-	-
	Cockles	..	1	-	-	-	-	-	-
	Crabs	95	113,916	199	181,044	3	3,021	..	2
	Lobster	3	27,917	1	9,907	1	6,958	..	27
	Mussels	-	-	-	-	-	-	-	-
	Nephrops	-	-	-	-	-	-	-	-
	Oysters	-	-	-	-	-	-	-	-
	Winkles	-	-	-	-	-	-	-	-
	Queens	..	3	-	-	..	3	-	-
	Scallops	2,248	3,130,540	1,229	1,729,138	222	301,530	3	3,780
	Shrimps/Prawns	-	-	-	-	-	-	-	-
	Squid	255	634,722	18	53,649	46	136,300	7	19,174
	Whelks	67	20,308	..	52	..	11	-	-
	Other Shellfish	3,028	2,694,313	410	332,376	258	143,108	43	23,785
Total	**Shellfish**	**5,696**	**6,621,721**	**1,857**	**2,306,166**	**531**	**590,932**	**52**	**46,769**
Total	**All Species**	**10,214**	**17,692,543**	**11,105**	**8,290,014**	**1,740**	**2,546,121**	**149**	**303,823**

Source: Fisheries Statistics Unit – Whitehall - London

STATISTICS OF FISH LANDINGS IN CORNWALL BY PORT 2003

Quantity and Value of Fresh and Frozen Fish landed by UK Vessels in 2003 (Live weight)

	Mevagissey		**River Fal - Falmouth**		**Flushing,Helford River,Penryn (Cornwall),Truro, Porthoustock & Mylor**		**Malpas,Coverack, Cadgwith,Mullion & Porthleven**	
	Quantity (tonnes)	Value (£)	Quantity (tonnes)	Value (£)	Quantity (tonnes)	Value (£)	Quantity (tonnes)	Value (£)
Bass	12	72,981	1	2,812	..	1,113	-	-
Blue Ling	-	-	..	45	-	-	-	-
Bream	-	-	..	1	..	20	-	-
Brill	1	2,832	..	688	..	2,319	..	13
Catfish	-	-	-	-	-	-	-	-
Cod	7	11,695	11	14,629	4	8,096	..	447
Conger Eel	16	12,255	6	3,443	7	2,940	-	-
Dabs	..	15	..	..	-	-	-	-
Dogfish	1	367	5	4,106	..	324	-	-
Flounders	1	87	..	63	-	-	-	-
Gurnard	1	386	2	502	..	99	-	-
Haddock	9	10,853	9	8,520	..	3	-	-
Hake	1	1,002	68	118,971	3	6,037	-	-
Halibut	-	-	1	2,111	-	-	-	-
Halibut-Mock	-	-	-	-	-	-	-	-
Lemon Sole	19	75,016	13	51,212	..	1,025	..	11
Ling	60	49,253	22	15,485	6	5,022	..	38
Megrims	..	14	88	179,786	..	110	-	-
Anglerfish	29	249,090	257	416,766	68	159,817	2	3,545
Mullet	1	5,504	..	1,155	..	843	..	489
Plaice	6	9,427	3	4,144	1	2,574	..	14
Pollack	184	210,891	18	18,529	2	2,248	..	94

	Redfish	-	-	2	1,151	-	-	-	-
	Saithe	1	451	2	1,471	..	124	-	-
	Sandeels	-	-	-	-	-	-	-	-
	Sharks	..	689	1	751	..	873	-	-
	Skate/Rays	2	1,878	22	20,751	9	9,013	..	244
	Sole	2	15,466	2	12,967	1	6,639	..	26
	Torsk	-	-	-	-	-	-	-	-
	Turbot	3	24,914	1	9,504	2	16,328	..	124
	Whiting	26	19,467	17	12,428	..	69	-	-
	Blue Whiting	-	-	-	-	-	-	-	-
	Whiting-Pout	2	502	2	272	..	67	-	-
	Witches	..	61	2	2,531	-	-	-	-
	Roes	2	2,888	1	1,505	..	67	-	-
	Other Demersal	8	14,903	17	44,810	1	1,041	..	20
Total	**Demersal**	**396**	**792,886**	**574**	**951,109**	**106**	**226,811**	**2**	**5,066**
	Herring	2	1,474	..	94	-	-	-	-
	Horse Mackerel	..	149	1	95	-	-	-	-
	Mackerel	60	30,165	16	9,956	..	299	-	-
	Pilchards	28	19,773	4	2,413	-	-	-	-
	Sprats	-	-	-	-	-	-	-	-
	Other Pelagic	..	32	-	-	-	-	-	-
Total	**Pelagic**	**91**	**51,593**	**20**	**12,559**	**..**	**299**	**-**	**-**
	Clams	-	-	-	-	-	-	-	-
	Cockles	-	-	-	-	-	-	-	-
	Crabs	19	16,574	42	38,491	252	346,187	26	28,190
	Lobster	1	7,522	..	3,207	2	21,109	1	9,059
	Mussels	-	-	-	-	-	-	-	-
	Nephrops	-	-	1	1,864	-	-	-	-
	Oysters	-	-	-	-	-	-	-	-
	Winkles	-	-	-	-	-	-	-	-
	Queens	-	-	-	-	-	-	-	-
	Scallops	12	16,568	1,221	1,806,178	8	14,080	-	-
	Shrimps/Prawns	-	-	-	-	-	-	-	-
	Squid	4	14,460	10	29,035	-	-	-	-
	Whelks	-	-	..	15	..	111	-	-
	Other Shellfish	12	9,349	3	2,677	..	2,976	..	2,192
Total	**Shellfish**	**48**	**64,472**	**1,277**	**1,881,467**	**263**	**384,463**	**27**	**39,442**
Total	**All Species**	**536**	**908,950**	**1,871**	**2,845,135**	**369**	**611,573**	**29**	**44,508**

Source: Fisheries Statistics Unit – Whitehall - London

STATISTICS OF FISH LANDINGS IN CORNWALL BY PORT 2003

Quantity and Value of Fresh and Frozen Fish landed by UK Vessels in 2003 (Live weight)

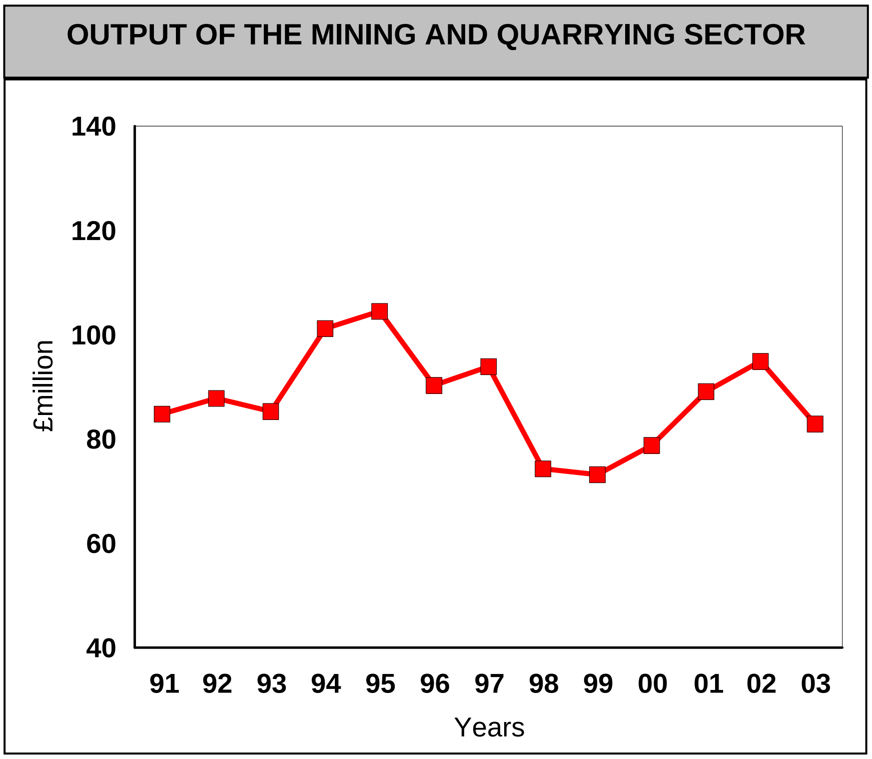
	Penzance		Newlyn		Penberth,Scilly Isles & Sennen	
	Quantity (tonnes)	Value (£)	Quantity (tonnes)	Value (£)	Quantity (tonnes)	Value (£)
Bass	..	166	13	72,539	-	-
Blue Ling	-	-	-	-	-	-
Bream	-	-	..	608	-	-
Brill	1	2,826	54	307,960	..	523
Catfish	-	-	-	-	-	-
Cod	1	1,681	170	349,413	..	82
Conger Eel	7	3,284	66	38,216	-	-
Dabs	-	-	1	120	..	..
Dogfish	-	-	122	136,688	-	-
Flounders	-	-	..	19	-	-
Gurnard	..	458	95	170,454	4	8,720
Haddock	1	1,512	223	253,306	..	139
Hake	..	334	549	1,161,324	..	80
Halibut	-	-	-	-	-	-
Halibut-Mock	-	-	-	-	-	-

	Lemon Sole	3	9,296	195	813,452	..	501
	Ling	1	746	281	222,720	..	25
	Megrims	9	23,535	982	2,883,440	1	2,957
	Anglerfish	11	22,235	1,214	2,627,282	1	1,385
	Mullet	..	657	21	132,582	..	323
	Plaice	5	8,709	94	198,525	..	727
	Pollack	3	5,946	589	1,243,475	..	332
	Redfish	-	-	-	-	-	-
	Saithe	1	1,025	59	61,659	-	-
	Sandeels	-	-	-	-	-	-
	Sharks	..	287	33	63,575	-	-
	Skate/Rays	4	3,714	432	537,317	2	1,843
	Sole	19	123,498	328	2,235,797	..	246
	Torsk	-	-	-	-	-	-
	Turbot	1	9,162	90	740,876	..	209
	Whiting	..	93	82	66,369	..	63
	Blue Whiting	-	-	-	-	-	-
	Whiting-Pout	..	19	23	8,047	-	-
	Witches	1	1,944	23	37,448	-	-
	Roes	-	-	7	8,929	-	-
	Other Demersal	..	1,790	105	382,060	..	2,311
Total	**Demersal**	**70**	**222,917**	**5,849**	**14,754,199**	**9**	**20,467**
	Herring	-	-	35	17,803	-	-
	Horse Mackerel	-	-	4	1,172	-	-
	Mackerel	-	-	305	336,090	-	-
	Pilchards	-	-	2	260	-	-
	Sprats	-	-	-	-	-	-
	Other Pelagic	-	-	1	1,660	-	-
Total	**Pelagic**	**-**	**-**	**346**	**356,985**	**-**	**-**
	Clams	-	-	-	-	-	-
	Cockles	11	1,331	-	-	-	-
	Crabs	75	109,821	638	845,461	114	142,362
	Lobster	2	16,399	14	144,826	22	162,272
	Mussels	-	-	-	-	-	-
	Nephrops	-	-	8	34,016	-	-
	Oysters	-	-	-	-	-	-
	Winkles	-	-	-	-	-	-
	Queens	-	-	-	-	-	-
	Scallops	..	765	494	836,553	-	-
	Shrimps/Prawns	-	-	-	-	-	-
	Squid	..	380	53	216,547	1	2,169
	Whelks	-	-	..	193	-	-
	Other Shellfish	..	247	569	466,278	2	38,920
Total	**Shellfish**	**88**	**128,944**	**1,777**	**2,543,875**	**139**	**345,723**
Total	**All Species**	**158**	**351,861**	**7,972**	**17,655,059**	**148**	**366,190**

Source: Fisheries Statistics Unit – Whitehall - London

- **Mining and Quarrying**

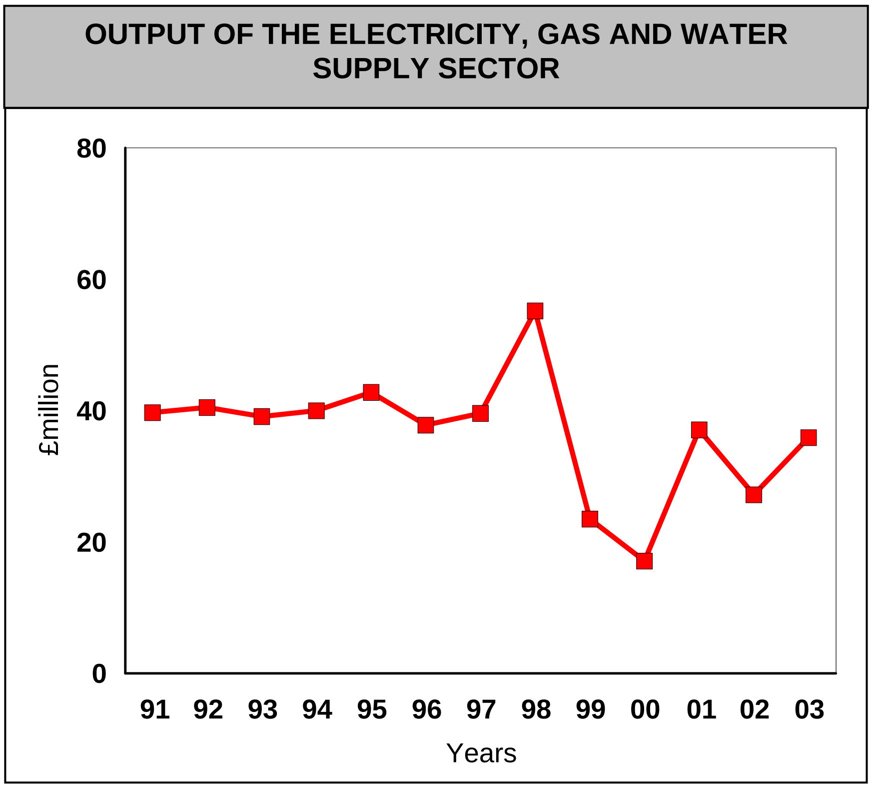
The largest share of the output of this sector in 2003 was in Restormel (84.8%), followed by North Cornwall (7.7%). Overall output in the sector fell between 1993 and 2003 by 0.3% per annum. As the following chart (Chart 5) shows, the sector has experienced little growth overall with a fall between 1993 and 1998 (2.7% per annum) followed by positive growth between 1998 and 2003 (2.2% per annum).



Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Chart 5)

- **The Electricity, Gas and Water Supply Sector**

This sector is concerned mainly with the task of distributing power supplies. The activity is located principally in Kerrier (taking 47.0% of the output of the sector in 2003) and in North Cornwall (accounting for 27.6%). There has been a slight decline in output overall between 1993 and 2003, -0.9% per annum. As the following chart (Chart 6) shows, after steady output between 1991 and 1997 the sector suffered a sharp decline to 2000 followed by a recovery back to earlier levels.

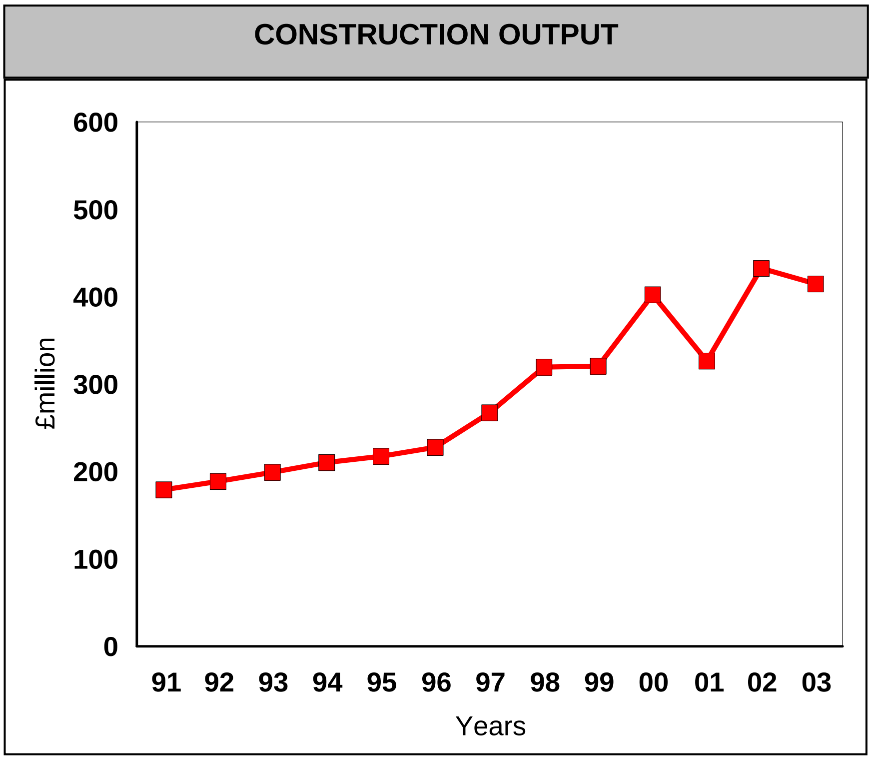


Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Chart 6)

- **Construction**

Construction output is a significant activity in the Cornwall economy accounting for 6.8% of total gross value added overall and for 59.6% of the primary production sector in 2003.

As the following chart (Chart 7) shows, output has been strong, rising by 7.6% per annum between 1993 and 2003. Growth, however, was faster in the first period of 1993 to 1998 (9.9% per annum), falling back to 5.3% per annum between 1998 and 2003. The activity was spread evenly across the districts.



Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Chart 3)

The performance of the sector is summarised in the following two tables (Tables 12 and 13). The first shows the percentage distribution of the total increase in output between 1993 and 2003 by sub-sector and by district. The second shows the same data expressed in terms of rates of growth between 1993 and 2003.

- **Summary Primary Production**

The performance of the sector is summarised in the following two tables (Tables 12 and 13). The first shows the percentage distribution of the total increase in output between 1993 and 2003 by sub-sector and by district. The second shows the same data expressed in terms of rates of growth between 1993 and 2003.

Table 12

PRIMARY PRODUCTION 2003/1993 SUMMARY % Change in Output by Sector and District: Quantitative Contributions								
	Caradon	**Carrick**	**Kerrier**	**North Cornwall**	**Penwith**	**Restormel**	**Isles of Scilly**	**Total**
Agriculture	-6.3	-3.8	-6.5	-12.3	-6.6	-4.0	0.0	-39.5
Fishing	1.2	0.2	2.0	-0.1	-2.5	1.1	0.1	2.2
Mining & Quarrying	-0.8	-0.4	-5.5	0.1	0.0	5.0	0.0	-1.6
Electricity, Gas & Water	-0.3	0.4	2.8	2.5	0.4	-8.1	0.1	-2.1
Construction	23.8	21.9	21.2	23.3	14.5	35.6	0.7	141.0
Total	17.7	18.3	14.0	13.5	5.9	29.6	1.0	100.0

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 12)

Table 13

PRIMARY PRODUCTION 2003/1993 SUMMARY (% per annum) Change in Output by Sector an District: Relative Rates of Growth								
	Caradon	**Carrick**	**Kerrie r**	**North Cornwall**	**Penwith**	**Restormel**	**Isles of Scilly**	**Total**
Agriculture	-3.4	-2.6	-3.3	-3.7	-4.7	-3.3	0.3	-3.5
Fishing	**25.0**	**4.1**	**10.3**	-1.1	-4.5	**7.4**	**5.9**	1.9
Mining & Quarrying	-4.5	-7.7	-13.1	0.3	0.7	1.1	**24.5**	-0.3
Electricity, Gas & Water	-1.9	**3.3**	**3.0**	**4.9**	**18.3**	-13.1	**4.3**	-0.9
Construction	**9.4**	**6.4**	**7.0**	**5.8**	**8.0**	**9.8**	**8.1**	**7.6**
Total	**3.6**	**3.5**	2.1	1.6	1.5	**2.9**	**4.2**	2.5

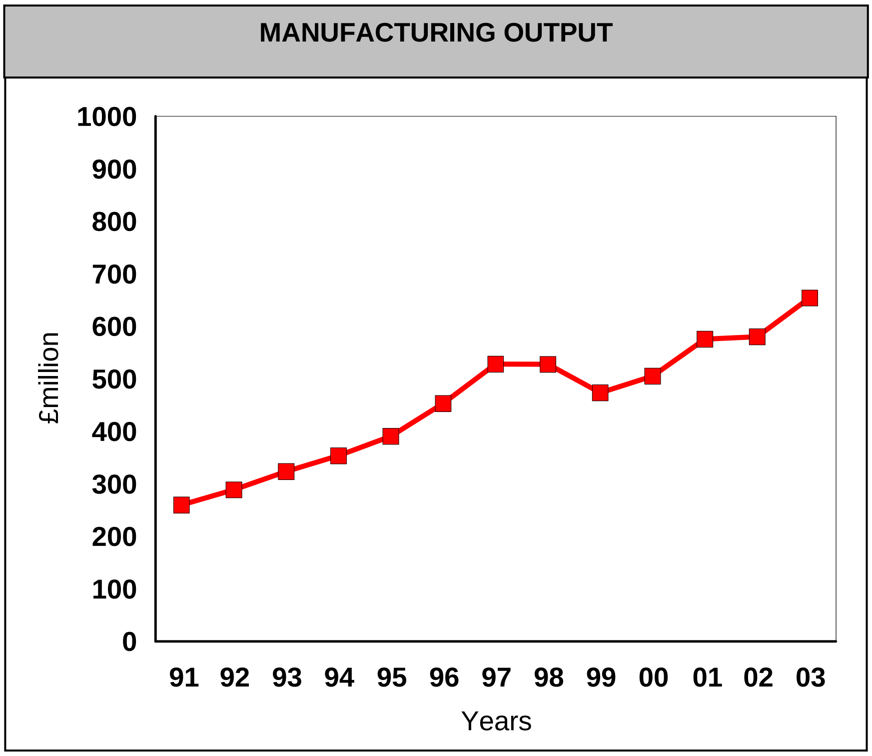
Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 13))

Note: Figures in bold indicate faster than average rates of growth

- **Manufacturing Sector**

General

The year by year movements in manufacturing output are shown in the chart (Chart 8) below. After strong growth between 1993 and 1998 of 10.3% per annum, the rate declined between 1998 and 2003 (4.4% per annum).



Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Chart 8)

AREA	Manufacturing GVA, 2002 (£ per employee)[4]	Economic activity rate May 05 (%)[5,6]	Claimant Count June 05[6] (%	Average gross weekly FT earnings 2004 £ Male[7]	Average gross weekly FT earnings 2004 £ Female[7]
South West	37,387	81.6	0.8	509.5	384.6
Bath & NE Somerset	...	85.4	0.5	526.9	384.7
Bournemouth	31,059	71.9	0.8	443.8	359.3
Bristol	...	77.2	1.2	548.8	418.8
N. Somerset	...	81.7	0.4	582.2	373.4
Plymouth	39,700	77.3	1.2	506.5	367.8
Poole	37,326	79.7	0.5	594.5	365.4
S. Gloucestershire	66,277	87.3	0.5	580.0	419.0
Swindon	52,136	86.5	1.4	624.8	414.3
Torbay	10,648	75.4	1.0	433.3	372.2
Cornwall & Isles of Scilly	25,115	79.0	0.9	411.4	359.9
Devon	28,278	79.7	0.7	446.6	366.8
Dorset	35,833	83.1	0.5	464.0	372.6
Gloucestershire	39,014	84.0	0.8	523.3	405.3
Somerset	39,315	84.6	0.6	477.7	368.2
Wiltshire	36,898	85.0	0.5	511.0	382.0

Source: SW Regional Development Agency - Sub-regional Indicators July 2005

[4]In Region in Figures 2004/05, ONS; detailed geographic breakdowns are currently unavailable for these areas
[5]Economic activity of working age population. Figure shows average of previous four quarters.
[6]Source: Nomisweb ONS
[7]Full-time earnings. Source Annual Survey of Hours and Earnings ONS

The following table gives more detail of the manufacturing sector. It shows that the sector is dominated by food, drink and tobacco, paper and publishing, mechanical engineering, electrical engineering and transport manufacturing accounting for some 60% of the total. The share taken by food and drink rose rapidly between 1993 and 1998 and showed a slight further rise between 1998 and 2003.

NET OUTPUT OF THE MANUFACTURING SECTOR (%)				
	1993	**1998**	**2003**	**1993/2003 % pa**
Food, Drink & Tobacco	15.2	25.7	28.5	14.2
Clothing	4.3	6.1	3.3	4.3
Leather & Footwear	1.0	0.3	0.3	-4.4
Timber & Furniture	5.9	5.4	7.6	10.1
Paper & Publishing	16.4	13.8	17.3	7.9
Chemicals	5.8	2.4	1.8	-4.4
Rubber & Plastic	4.8	7.1	6.5	10.6
Non-metal Manufacturing	4.6	3.7	2.7	2.0
Metal Manufacturing	1.6	1.1	0.7	-0.8
Other Metal Manufacturing	8.9	6.6	3.9	-1.1
Mechanical Engineering	11.3	9.9	8.2	3.8
Electrical Engineering	6.3	5.6	5.8	6.3
Instrument Engineering	4.6	4.6	3.4	4.2
Transport Manufacturing	7.6	5.6	6.4	5.5
Other Manufacturing	1.7	2.2	3.5	15.4
Total Manufacturing	100.0	100.0	100.0	7.3

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 14)

The following table ranks the manufacturing sector in order of importance by district in 2003.

THE MANUFACTURING SECTOR Change Between 1993 and 2003 in order of District Importance			
	% in 2003	**% of total change 1993/2003**	**% pa 1993/2003**
North Cornwall	26.5	33.0	10.4
Kerrier	19.5	18.5	6.8
Carrick	17.7	16.4	6.5
Restormel	17.7	14.0	5.3
Caradon	11.8	13.7	9.3
Penwith	6.8	4.1	3.8
Isles of Scilly	0.2	0.2	6.1
Total	100.0	100.0	7.3

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 15)

The following table (Table 16) ranks the manufacturing sector in order of importance of sub-sectors in 2003.

THE 'HOT SPOTS' IN THE CHANGES IN THE COUNTRY'S MANUFACTURING OUTPUT		
	% of total increase	**% pa 1993/2003**
North Cornwall - Food & Drink	19.4	23.3
Restormel - Food & Drink	6.9	11.2
Caradon - Food & Drink	6.7	27.2
North Cornwall - Paper & Publishing	5.0	8.7
Carrick - Paper & Publishing	4.2	8.2
Carrick - Transport Manufacture	3.8	6.3
Carrick - Timber & Furniture	3.5	21.8
Carrick - Food & Drink	3.4	13.1
Kerrier - Food & Drink	3.2	4.7
Total	56.1	
County Total	100.0	7.3

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 16)

The performance of the manufacturing sector is summarised in the following two tables. The following table shows the percentage distribution of the total increase in output between 1993 and 2003 by sub-sectors and by district. The second shows the same data expressed in terms of rates of growth between 1993 and 2003.

MANUFACTURING 1993/2003 SUMMARY (%)
Change in output by Sector and District: Quantitative Contributions

	Caradon	Carrick	Kerrier	North Cornwall	Penwith	Restormel	Isles of Scilly	Total
Food, Drink & Tobacco	6.7	3.4	3.2	19.4	1.8	6.9	0.0	41.5
Clothing	-0.4	0.4	2.0	0.6	0.1	-0.5	0.0	2.2
Leather & Footwear	0.0	0.0	-0.1	0.1	-0.5	0.1	0.0	-0.4
Timber & Furniture	0.8	3.5	1.7	2.8	0.4	0.2	0.0	9.3
Paper & Publishing	2.0	4.2	2.4	5.0	1.6	2.9	0.0	18.2
Chemicals	-0.4	0.1	0.2	0.8	0.0	-2.8	0.0	-2.0
Rubber & Plastic	1.8	1.2	1.0	1.3	0.0	2.9	0.0	8.2
Non-metal Manufacturing	0.3	-0.3	-0.2	0.6	0.2	0.2	0.0	1.0
Metal Manufacturing	0.0	-0.3	0.0	0.1	0.3	-0.2	0.0	-0.1
Other Metal Manufacturing	1.0	-0.5	-1.6	0.0	0.2	0.0	0.1	-0.9
Mechanical Engineering	-0.7	0.9	4.7	0.2	-1.0	0.8	0.0	5.1
Electrical Engineering	0.2	-1.0	3.6	1.6	0.1	0.6	0.0	5.2
Instrument Engineering	0.4	0.2	0.1	-0.1	0.1	1.5	0.1	2.3
Transport Manufacturing	1.1	3.8	0.4	-0.4	0.0	0.2	0.0	5.3
Other Manufacturing	0.6	0.7	1.0	1.0	0.8	1.2	0.0	5.2
Total Manufacturing	13.7	16.4	18.5	33.0	4.1	14.0	0.2	100.0

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 17)

MANUFACTURING 1993/2003 SUMMARY (%pa) Change in Output by Sector and District: Relative Rates of Growth								
	Caradon	**Carrick**	**Kerrier**	**North Cornwall**	**Penwith**	**Restormel**	**Isles of Scilly**	**Total**
Food, Drink & Tobacco	**27.2**	**13.1**	4.7	**23.3**	**10.9**	**11.2**	3.7	**14.2**
Clothing	-5.8	**9.8**	**12.3**	5.3	1.9	-6.1	2.7	4.3
Leather & Footwear	**9.7**	7.2	-6.8	**16.8**	-17.4	**10.6**	2.6	-4.4
Timber & Furniture	4.7	**21.8**	**10.1**	**15.2**	**8.5**	1.0	-20.2	**10.1**
Paper & Publishing	**7.4**	**8.2**	**10.0**	**8.7**	**8.3**	5.7	**6.7**	**7.9**
Chemicals	-10.4	2.6	**8.4**	6.8	-1.7	-13.8	2.6	-4.4
Rubber & Plastic	**15.3**	**10.9**	6.6	**11.4**	-0.1	**18.7**	2.7	**10.6**
Non-metal Manufacturing	**7.5**	-3.5	-1.8	**9.4**	7.2	1.6	2.6	2.0
Metal Manufacturing	4.6	-14.3	-0.9	1.6	5.8	-12.1	2.7	-0.8
Other Metal Manufacturing	**9.4**	-5.2	-8.0	-0.1	1.8	0.0	**27.4**	-1.1
Mechanical Engineering	-4.8	4.5	**10.1**	2.2	-6.5	3.9	2.6	3.8
Electrical Engineering	**10.6**	-6.6	**34.1**	4.1	2.7	**16.7**	2.7	6.3
Instrument Engineering	**12.2**	4.8	0.8	-0.8	7.0	7.2	**27.5**	4.2
Transport Manufacturing	**14.9**	6.3	3.8	-4.5	0.4	**11.1**	3.0	5.5
Other Manufacturing	**18.7**	6.6	**22.6**	**21.4**	**13.9**	**23.9**	2.6	**15.4**
Total Manufacturing	**9.3**	6.5	6.8	**10.4**	3.8	5.3	6.1	7.3

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 18)

Note: Figures emboldened indicate faster than average rates of growth

MANUFACTURING - Employment

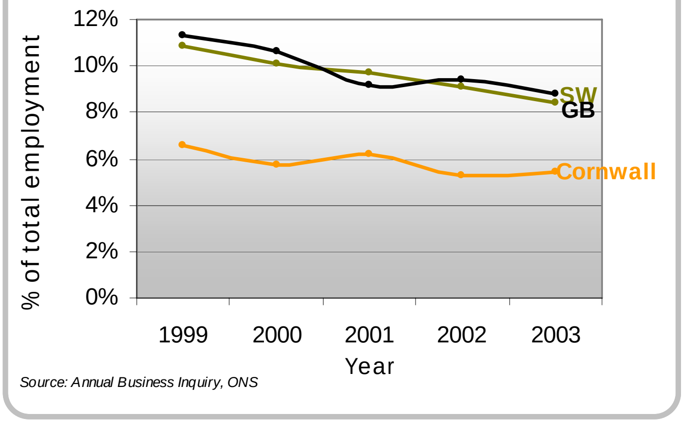


Fig. 1 Manufacturing employment as a % of total

1. Over 9,700 jobs in Cornwall are in the manufacturing sector.
2. Between 1999 and 2003, the sector has remained about the same in absolute terms showing more resilience than the sector in the SW and GB where employment has fallen by 16.4% and 19.8% respectively.
3. As a proportion of total employment (see figure 1), the manufacturing sector in Cornwall has dropped slightly from 6.6% to 5.4%.
4. Although as a percentage of total employment Cornwall's manufacturing sector is lower than nationally (5.4% compared to 8.8%), it is still perhaps higher than expected.

The employment figures in this profile refer to the number of jobs in the manufacturing sector. Figure 1 uses the total figure, thus incorporating both part and full time work.

Manufacturing sector

	Part time	Full time	Total
1999	1,061	8,764	9,836
2000	703	8,468	9,170
2001	874	9,556	10,434
2002	969	8,417	9,396
2003	965	8,801	9,766
% change	-9.05%	0.42%	-0.71%

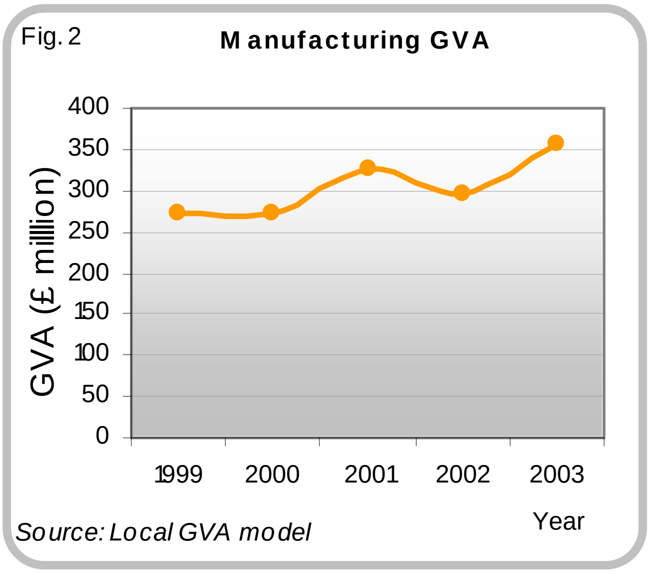
Source: Annual Business Inquiry ONS © Crown Copyright

Manufacturing employment as a % of total

	Cornwall	SW	GB
1999	6.59%	10.88%	11.33%
2000	5.76%	10.11%	10.65%
2001	6.17%	9.68%	9.15%
2002	5.27%	9.09%	9.37%
2003	5.39%	8.42%	8.78%

Source: Annual Business Inquiry ONS © Crown Copyright

Gross Value Added



1. The manufacturing sector in Cornwall is worth £355 million.
2. The sector has grown from £273 million in 1999 to £355 in 2003 (6.8% p.a. [per annum]). Conversely, nationally there has been a decline of 4.5% p.a.
3. In 2003, the manufacturing sector in Cornwall made up 5.8% of the economy, compared to 11.3% in the UK.
4. Apart from food and drink manufacturing, that is included in a separate fact sheet, transport manufacturing (e.g. ship building) and wood and timber manufacturing have shown significant growth rates of 11.6% p.a. and 10% p.a.

Manufacturing GVA data has been sourced from the Local GVA model for Cornwall level data and the Office for National Statistics (ONS) for UK statistics. The following tables provide the raw data from which the graphs on page one were produced.

Manufacturing GVA (£ million)

	Cornwall	UK
1999	273.15	132846
2000	273.58	131842
2001	325.19	130311
2002	296.58	126317
2003	354.98	110571

Source: Local GVA model © Nankivell 2005 & ONS © Crown Copyright

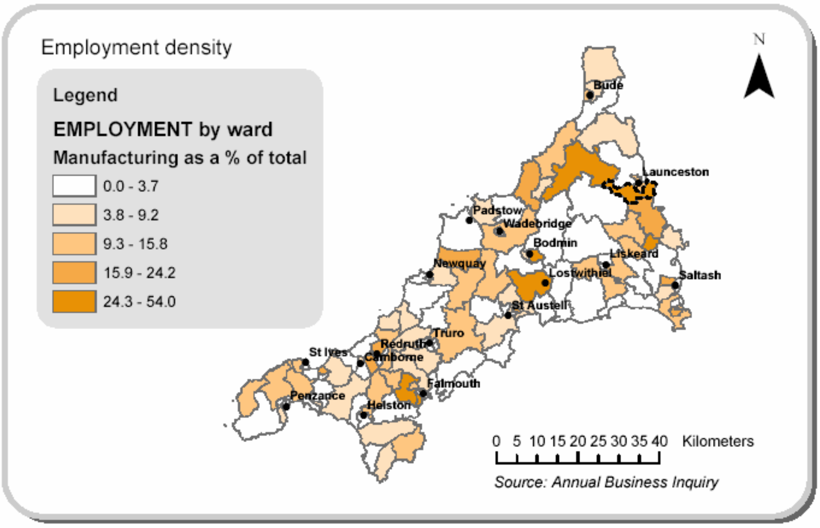
Manufacturing GVA (% of total)

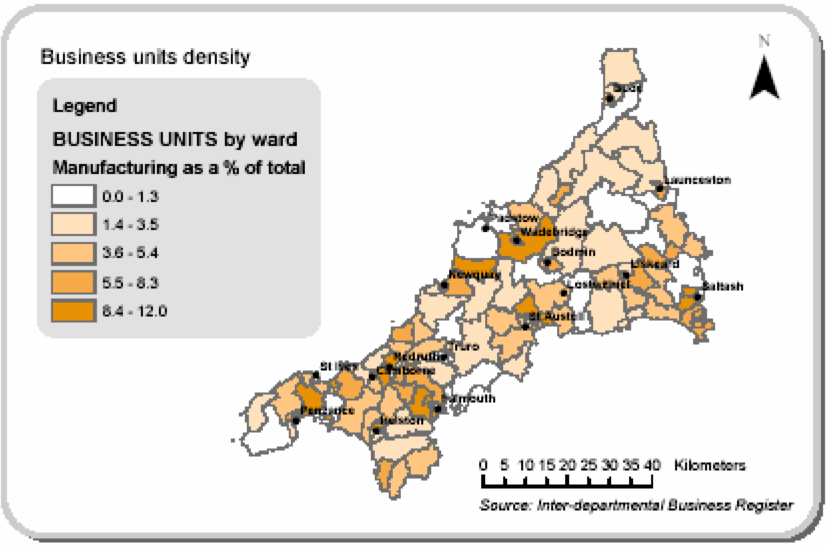
	Cornwall	UK
1999	6.75%	16.67%
2000	6.16%	15.72%
2001	6.64%	14.79%
2002	5.40%	13.64%
2003	5.84%	11.33%

Source: Local GVA model © Nankivell 2005 & ONS © Crown Copyright

Spatial Distribution

1. The 2 figures below (3 and 4) map the employment and business unit (i.e. premises) density for manufacturing (Nb. The scales are different for each map).
2. Penwith is the only district without at least one ward where manufacturing makes up at least 25% of the employment.
3. Figure 3 shows that North Cornwall district has the most wards with high employment in manufacturing, in particular, South Petherwin near Launceston (highlighted with a dashed outline) has the highest density of employment in manufacturing at over 50%.
4. Figure 4 shows that there is a fairly even spread of manufacturing business units across the county.





- **The Food, Drink and Tobacco Manufacturing Sector**

The following table gives more detail for the food and drink manufacturing sector. The overall rate of growth between 1993 and 2003 was a very rapid 14.2% per annum. This was due largely to rates of growth of 24.2% per annum and 24.0% per annum in meat products and bread and biscuits respectively.

NET OUTPUT OF THE FOOD AND DRINK MANUFACTURING SECTOR (%)				
	1993	**1998**	**2003**	**1993/2003 % pa**
Meat & Meat Products	18.7	35.7	43.3	24.2
Fish	3.1	0.3	0.3	-9.2
Fruit & Vegetables	2.9	0.6	0.2	-11.6
Oils & Fats	0.0	0.0	0.0	0.0
Dairy Products	13.8	4.1	3.1	-1.7
Ice Cream	4.2	2.2	2.0	6.2
Grains & Starches	0.0	0.0	0.0	0.0
Animal Foods	3.1	0.4	0.9	1.4
Bread & Biscuits	17.8	44.9	40.4	24.0
Sugar & Cocoa	1.6	0.8	0.9	7.9
Other Foods	1.7	1.5	1.3	11.0
Alcohol	32.9	9.3	7.4	-1.6
Soft Drinks	0.3	0.1	0.1	5.4
Tobacco	0.0	0.0	0.0	0.0
Total	100.0	100.0	100.0	14.2

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 19)

The following table ranks food and drink manufacturing activity in 2003 in order of principal products. It shows that meat and meat products and bread and biscuits manufacture were the dominant industries within the food and drink sector in 2003, accounting for around 84% of total output.

THE FOOD AND DRINK MANUFACTURING SECTOR Change between 1993 and 2003 in order of Sector Importance			
	% in 2003	**% of total change 1993/2003**	**% pa 1993/2003**
Meat & Meat Products	43.3	52.1	24.2
Bread & Biscuits	40.4	48.6	24.0
Alcohol	7.4	-1.8	-1.6
Milk etc.	3.1	-0.8	-1.7
Ice Cream	2.0	1.2	6.2
Other Foods	1.3	1.1	11.0
Sugar & Cocoa	0.9	0.6	7.9
Animal Foods	0.9	0.2	1.4
Fish	0.3	-0.7	0.0
Fruit & Vegetables	0.2	-0.8	-11.6
Soft Drinks	0.1	0.1	0.0
Grains & Starch	0.0	0.0	0.0
Oils & Fats	0.0	0.0	0.0
Tobacco	0.0	0.0	0.0
Total	**100.0**	**100.0**	**14.2**

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 20)

The following table ranks food and drink manufacturing activity in order of principal districts. It shows that food and drink manufacturing activity is concentrated in North Cornwall, Restormel, Kerrier and Caradon with these four areas accounting for 85% of the county's total output. North Cornwall also accounted for almost half the increase in output between 1993 and 2003 with the fastest growth in the county of 23.3% per annum.

THE FOOD AND DRINK MANUFACTURING SECTOR Change between 1993 and 2003 in order of district importance			
	% in 2003	**% of total change 1993/2003**	**% pa 1993/2003**
North Cornwall	39.3	46.8	23.3
Restormel	18.7	16.6	11.2
Kerrier	15.4	7.7	4.7
Caradon	13.1	16.2	27.2
Carrick	8.6	8.3	13.1
Penwith	4.9	4.3	10.9
Isles of Scilly	0.0	0.0	3.7
Total	**100.0**	**100.0**	**14.2**

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 21)

The following table shows a selection of 'hotspots' taken from the components of Table 23.

SELECTED HOTSPOTS IN THE CHANGES IN THE COUNTY'S FOOD AND DRINK SECTOR		
	% of total increase	**% pa 1993/2003**
North Cornwall - Meat Products	23.1	65.1
North Cornwall - Bread & Biscuits	22.2	34.4
Restormel - Meat Products	15.1	124.6
Caradon - Bread and Biscuits	14.3	30.0
Kerrier - Meat Products	7.0	9.7
Carrick - Meat Products	6.1	17.4
Total	**87.8**	**14.2**

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 23)

The performance of the sector is summarised in the following two tables. The first shows the percentage distribution of the total increase in output between 1993 and 2003 by sub-sector and by district. The second shows the same data expressed in terms of rates of growth between 1993 and 2003.

FOOD AND DRINK MANUFACTURING SECTOR 1993/2003 SUMMARY (%) Change in output by sector and district: Quantitive contribution								
	Caradon	**Carrick**	**Kerrier**	**North Cornwall**	**Penwith**	**Restormel**	**Isles of Scilly**	**Total**
Meat & Meat Products	0.5	6.1	7.0	23.1	0.3	15.1	0.0	52.1
Fish	0.0	0.0	0.0	0.1	-0.9	0.1	0.0	-0.7
Fruit & Vegetables	0.0	0.2	-0.9	0.0	0.0	-0.1	0.0	-0.8
Oils & Fats	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Milk etc.	-0.1	-0.6	0.3	-0.5	0.0	0.1	0.0	-0.8
Ice Cream	0.0	0.0	0.9	0.8	0.0	-0.4	0.0	1.2
Grains & Starch	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Animal Foods	0.0	0.0	-0.1	0.3	0.0	-0.1	0.0	0.2
Bread & Biscuits	14.3	1.6	4.8	22.2	4.0	1.7	0.0	48.6
Sugar & Cocoa	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.6
Other Foods	1.4	0.2	0.1	-0.1	0.0	-0.4	0.0	1.1
Alcohol	0.0	0.9	-4.5	0.9	0.1	0.7	0.0	-1.8
Soft drinks	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.1
Tobacco	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	**16.2**	**8.3**	**7.7**	**46.8**	**4.3**	**16.6**	**0.0**	**100.0**

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005

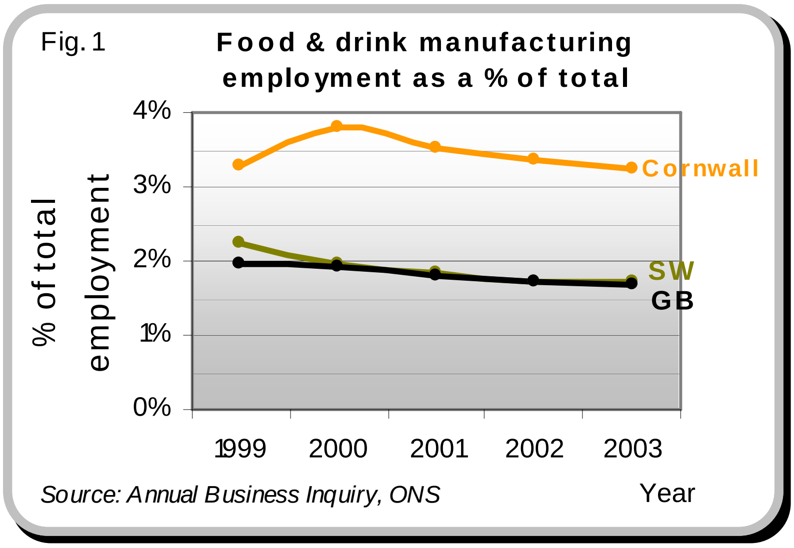
FOOD AND DRINK MANUFACTURING SECTOR 1993/2003 SUMMARY (% pa) Change in output by sector and district: relative rates of growth								
	Caradon	**Carrick**	**Kerrier**	**North Cornwall**	**Penwith**	**Restormel**	**Isles of Scilly**	**Total**
Meat & Meat Products	14.2	**17.4**	9.7	**65.1**	8.5	**124.6**	2.7	**24.2**
Fish	0.0	0.0	0.0	0.0	0.0	7.7	0.0	0.0
Fruit & Vegetables	8.0	**27.4**	-33.6	12.2	**26.5**	-19.6	2.6	-11.6
Oils and Fats	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Milk etc.	-3.6	-27.1	3.0	-1.9	8.1	2.9	2.6	-1.7
Ice Cream	8.1	7.3	**65.4**	5.8	8.1	-29.7	2.7	6.2
Grains & Starch	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Animal Foods	-1.4	0.0	0.0	0.0	0.0	0.0	0.0	1.4
Bread & Biscuits	**30.0**	13.2	**16.0**	**34.4**	**31.3**	7.1	2.6	**24.0**
Sugar & Cocoa	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.9
Other Foods	0.0	**22.9**	0.0	0.0	0.0	0.0	0.0	11.0
Alcohol	2.4	9.4	-17.8	**19.5**	5.2	1.2	3.8	-1.6
Soft Drinks	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tobacco	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	**27.2**	13.1	4.7	**23.3**	10.9	11.2	3.7	14.2

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 24)

Note: Figures emboldened indicate faster than average rates of growth

- **Food and Drink**

Employment



Source: LINC Cornwall Sector Profile

1. There are over 21,000 jobs in the food and drink sector in Cornwall.
2. Between 1999 and 2003 employment in the food & drink manufacturing sector in Cornwall increased by 19%, compared to declines of 17.1% and 10.6% in the SW and GB respectively.
3. Growth in employment in this sector in Cornwall is overwhelmingly in full time employment.
4. Full time jobs now account for over 92% of the total employment in the food and drink manufacturing sector in Cornwall, slightly higher than SW and GB.
5. However, as fig. 1 shows, despite a significant growth in employment, when measured as a proportion of total employment, the sector has declined slightly in parallel to the South West and GB.

The table below shows that in 2003 employment in food and drink manufacturing in Cornwall was twice as significant as nationally. However, analysis of a broader definition of the sector (to include retail and wholesale activities) closes the gap.

	Cornwall	SW	GB
Manufacturing	3.2%	1.7%	1.7%
Broad definition	11.6%	8.0%	7.1%

The employment figures in this profile refer to the number of jobs in the food and drink sector. Figure 1 uses the total figure, thus incorporating both part and full time work.

Food & drink manufacturing sector

	Part time	Full time	Total
1999	613	4,284	4,921
2000	678	5,337	6,037
2001	583	5,357	5,956
2002	497	5,460	5,973
2003	459	5,372	5,854
% change	-25.1%	25.4%	19.0%

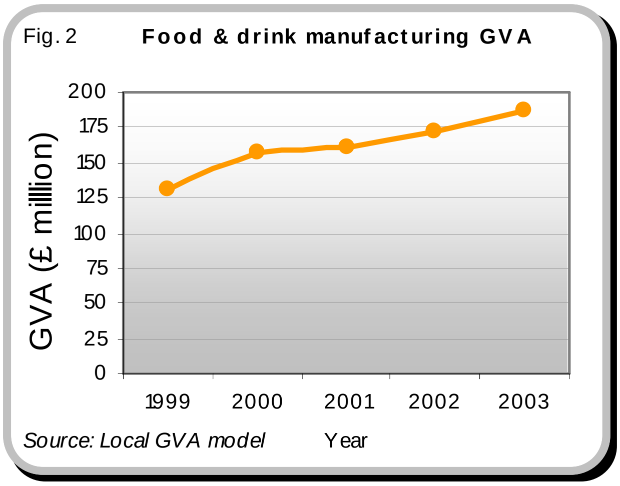
Source: Annual Business Inquiry ONS © Crown Copyright

Food & drink broad definition

	Part time	Full time	Total
1999	7,567	9,708	17,296
2000	7,848	10,287	18,154
2001	8,192	11,132	19,340
2002	9,340	11,321	20,679
2003	9,164	11,882	21,066
% change	21.1%	22.4%	21.8%

Source: Annual Business Inquiry ONS © Crown Copyright

GROSS VALUE ADDED



Source: LINC Cornwall Sector Profile

1. Despite a small decline in the food and drink manufacturing sector in Cornwall as a percent of total GVA, in absolute terms (as shown in fig. 2) the sector has grown from £131 million in 1999 to £186 million in 2003.
2. In 2003, food and drink manufacturing made up 3% of the economy in Cornwall, compared to 2% nationally.
3. Growth in food and drink manufacturing since 1999 has largely been concentrated in the districts of Restormel (17% p.a. [per annum]) and North Cornwall (15% p.a.).
4. Meat & meat products and bread & biscuits together make up 83.7% of the food and drink manufacturing sector in Cornwall.
5. For further detailed analysis of food and drink GVA refer to Nankivell (2005) The Cornwall economy 1993-2003.

Food and drink manufacturing GVA data has been sourced from the Local GVA model for Cornwall level data and the Office for National Statistics (ONS) for UK statistics. The following tables provide the raw data from which the graphs on page one were produced.

GVA (£ million)

	Cornwall	UK
1999	131.3	20,226
2000	156.3	20,300
2001	161.1	20,936
2002	172.8	21,141
2003	186.3	22,232

Source: Local GVA model © Nankivell 2005 & ONS © Crown Copyright

GVA (% of total)

	Cornwall	UK
1999	3.2%	2.5%
2000	3.5%	2.4%
2001	3.3%	2.4%
2002	3.1%	2.3%
2003	3.1%	2.3%

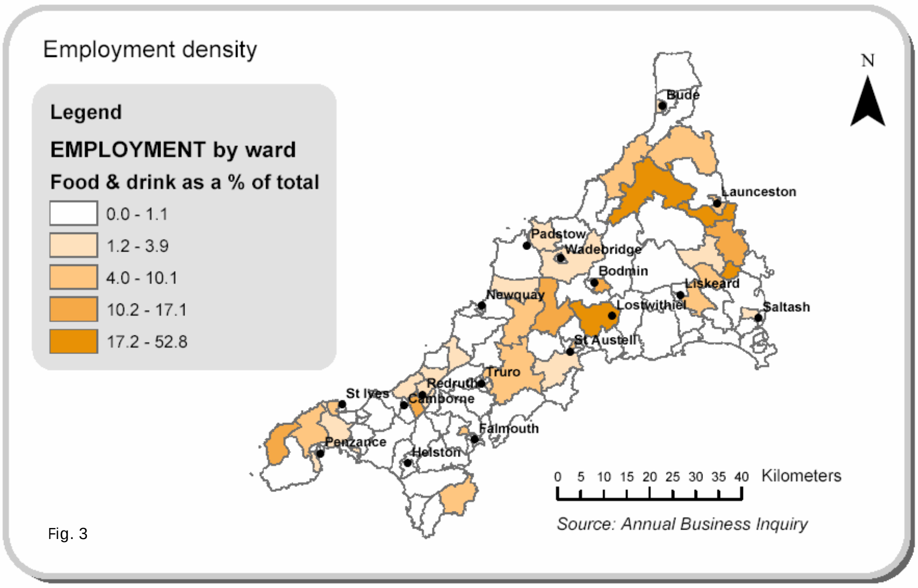
Source: Local GVA model © Nankivell 2005 & ONS © Crown Copyright

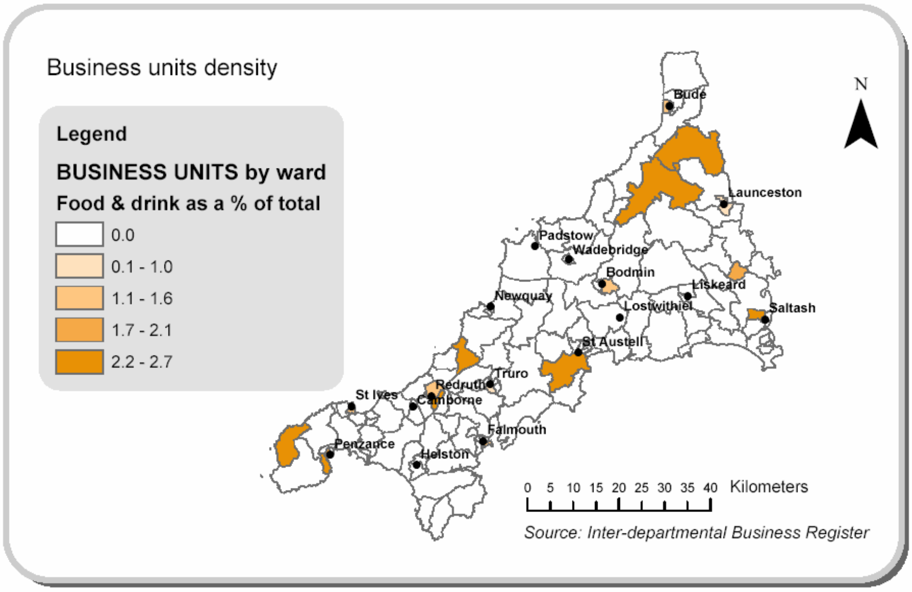
Spatial distribution

The 2 figures below (3 and 4) map the employment and business unit (i.e. premises) density for food and drink manufacturing (Nb. The scales are different for each map).

South of Launceston (north east Cornwall) there is high density of food and drink employment but a low density of business units, indicating a small number of large employers, this is also true for the Lostwithiel area

Food and drink manufacturing





Source: LINC Cornwall Sector Profile

- **The Wholesale, Retail and Repair Sector**

The wholesale, retail and repair sector represents 21.3% of the Cornwall economy's gross value added. This compares with a national share of only 12.7%. The sector has grown strongly over the decade 1993 to 2003 by 10.6% per annum. Growth was 10.1% per annum in the earlier period, 1993 to 1998, accelerating to 11.1% per annum between 1998 and 2003.

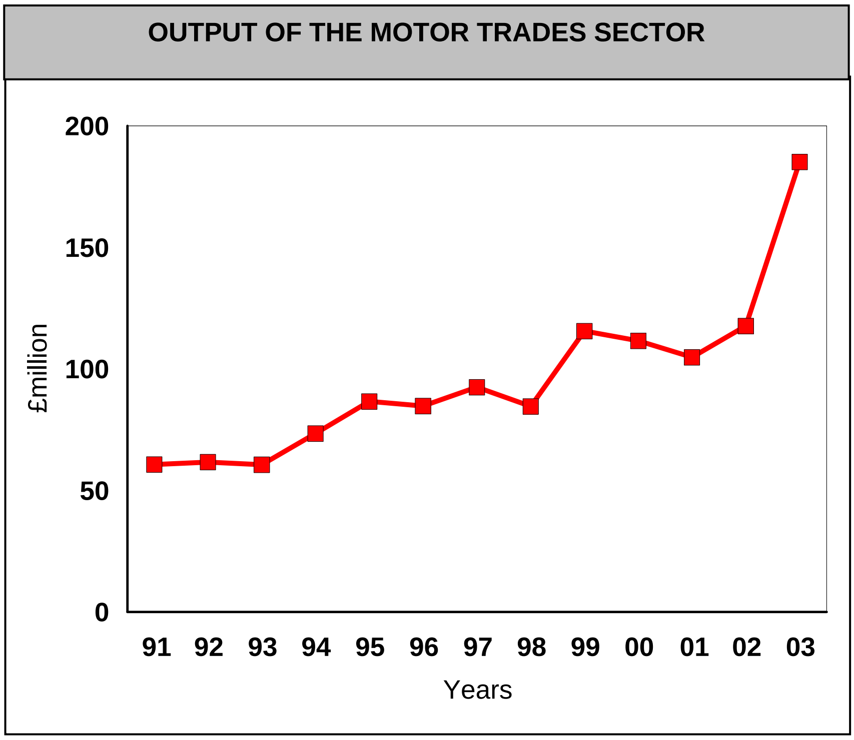
The sector comprises the three main components whose relative importance is illustrated in the table (Table 25) below.

THE WHOLESALE, RETAIL AND REPAIR SECTOR Share taken by sub-sectors and rates of growth		
	2003 %	1993/2003 % pa
Sale & Repair of Motor Vehicles	14.3	11.8
Wholesale	13.3	6.8
Retail	72.4	11.3
Total	**100.0**	**10.6**

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 25)

- **Sale and Repair of Motor Vehicles**

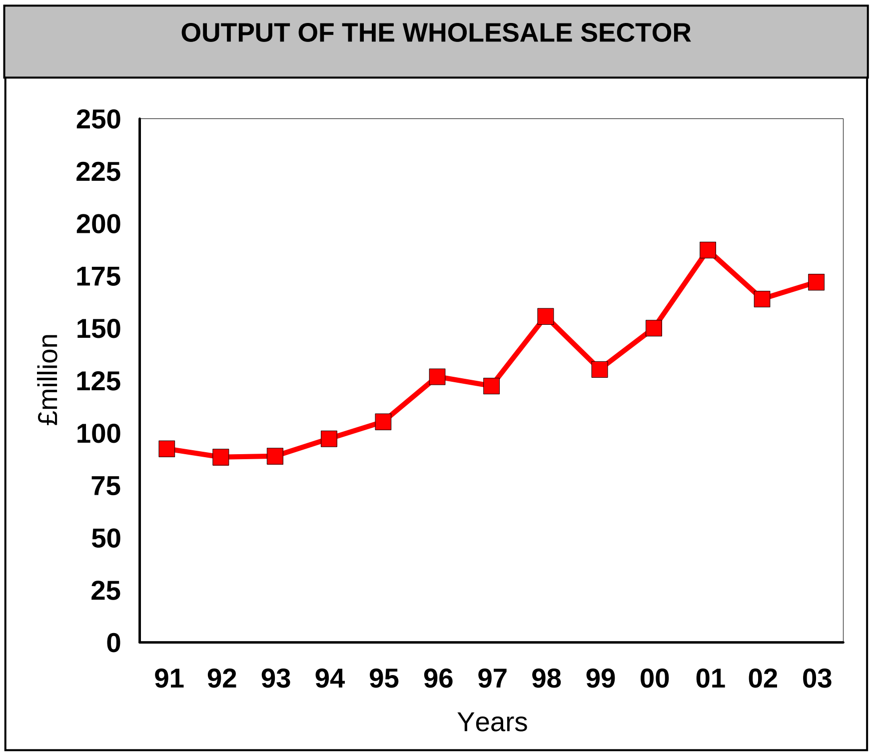
The following chart shows that the steady growth throughout the period was interrupted in 2000 but has subsequently recovered strongly. The rate of growth between 1993 and 1998 was 6.9% per annum, but accelerated to 16.9% per annum between 1998 and 2003, giving an overall growth for the period 1993 to 2003 of 11.8% per annum.



Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Chart 9)

- **Wholesale**

As the following chart for wholesaling shows the output of the wholesaling sector grew strongly by 6.8% per annum between 1993 and 2003.

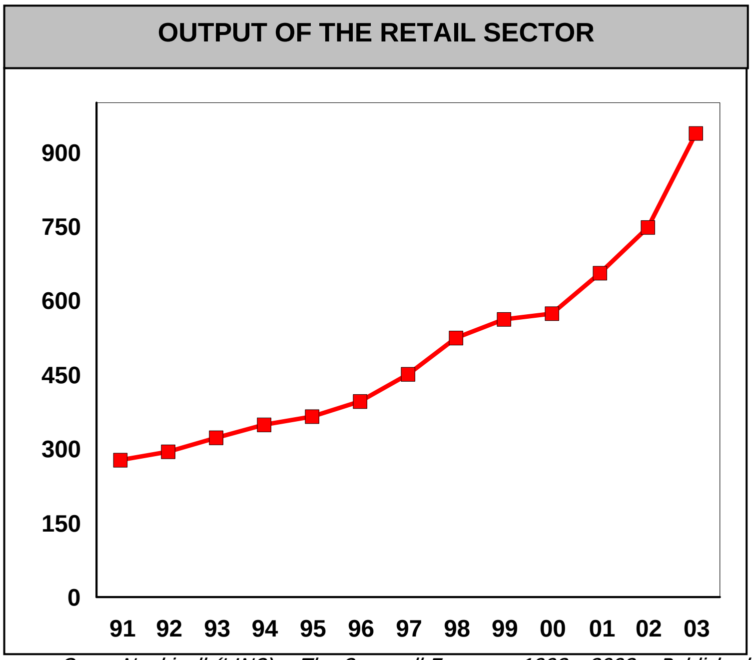


Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Chart 10)

Growth was much more rapid in the first period, 1993 to 1998 (11.8% per annum) compared with 2.0% per annum between 1998 and 2003.

- **Retail (additional information to follow)**

As the following chart shows, the retailing sector has enjoyed a strong and steady expansion virtually throughout the whole period.



Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Chart 11)

The overall rate of growth for the period 1993 to 2003 was 11.3% per annum. The rate was slightly slower in the period 1993 to 1998 (10.2% per annum), accelerating to 12.3% per annum between 1998 and 2003.

SHOPPING CENTRE YIELDS - % (Cornwall)

Months	Liskeard	Bodmin	St Austell	Newquay	Truro	Falmouth	Redruth	Camborne	Helston	Penzance
Apr-00	9.25	8.5	8.75	8.5	5.5	8	8.5	9	9.25	8.5
Oct-00	9.25	8.5	8.25	8.5	5.5	8	9	9	9.25	9
Apr-01	10	9	8.25	8.5	6	8	9.5	9	9	9
Oct-01	10	9	8.25	8	6	8	9	9	9	9
Apr-02	>10	9	8.25	8	6	8	9	9.25	9.25	9
Oct-02	>10	9	8.5	8	6	8	9	9.25	9.25	9
Apr-03	>10	8.5	8.5	8	6	8	9	9	9.25	8.5
Jan-04	>10	8.5	8.5	8	6	8	9	9	9.25	8
Jul-04	>10	8.5	8.5	8	6	8	9	9	9	8

Source: Copyright Valuation Office Agency / LINC – Local Intelligence Network Cornwall

Wholesale, Retail and Repair Sector Summary

The following two tables summarise the performance of the sector. The first shows the percentage distribution of the total increase in output between 1993 and 2003 by sub-sector and by district. The second shows the same data expressed in terms of rates of growth between 1993 and 2003.

WHOLESALE, RETAIL AND REPAIR 2003/1993 SUMMARY (%) Change in output by sector and district: quantitive contributions								
	Caradon	**Carrick**	**Kerrier**	**North Cornwall**	**Penwith**	**Restormel**	**Isles of Scilly**	**Total**
Sale & Repair of Motor Vehicles	2.7	3.4	2.1	2.0	1.3	3.7	0.0	15.1
Wholesale	3.0	0.9	2.6	1.2	1.0	1.4	0.0	10.1
Retail	10.9	17.2	12.3	13.1	9.3	11.7	0.3	74.8
Total	**16.6**	**21.6**	**16.9**	**16.2**	**11.6**	**16.8**	**0.3**	**100.0**

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 26)

WHOLESALE, RETAIL AND REPAIR 2003/1993 (% p.a.) Change in output by sector and district: relative rates of growth								
	Caradon	Carrick	Kerrier	North Cornwall	Penwith	Restormel	Isles of Scilly	Total
Sale & Repair of Motor Vehicles	**15.1**	**11.7**	10.1	9.6	10.3	**13.5**	10.0	**11.8**
Wholesale	**11.3**	3.0	**11.2**	4.3	6.4	5.9	1.1	6.8
Retail	**12.8**	**11.1**	**12.0**	**12.6**	10.2	9.6	6.0	**11.3**
Total	**12.8**	10.0	**11.6**	**10.7**	9.8	9.7	5.6	10.6

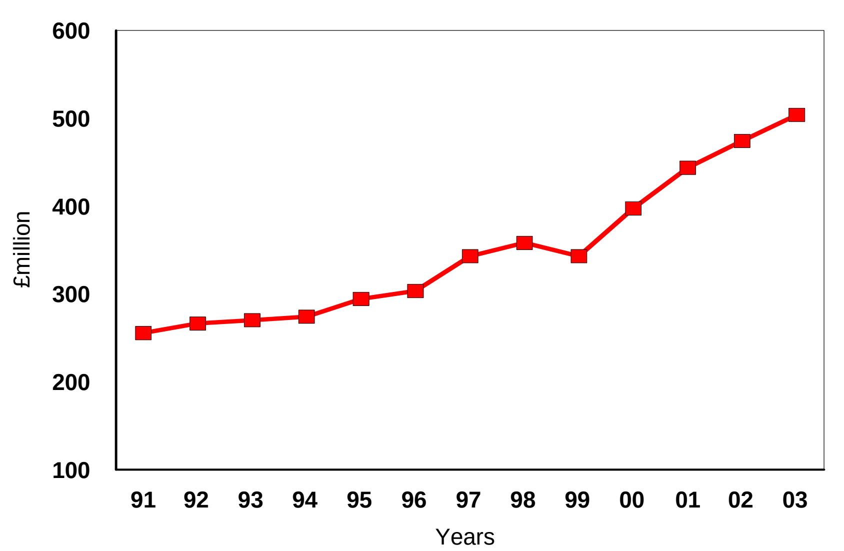
Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table27)

Note: Figures emboldened indicate faster than average rates of growth

- **Hotels and Catering Sector**

This section gives more detail about the performance of the hotels and catering sector. This sector represented 8.3% of the Cornwall economy's gross value added in 2003. This is significantly above the national share of 3.4%. It has also grown reasonably strongly between 1993 and 2003 at 6.4% per annum, although slightly slower than the rate of 7.5% per annum for the Cornwall economy as a whole. The rate was slightly faster in the second half of the decade. The following chart illustrates the year on year movements.

OUTPUT OF THE HOTELS AND CATERING SECTOR



Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Chart 12)

As the table below shows, in terms of contribution to output for the sector, 'eating out' services generally have experienced an increase between 1993 and 2003.

NET OUTPUT OF THE HOTELS AND CATERING SECTOR (%)

	1993	**1998**	**2003**
Hotels	44.0	42.0	40.2
Camping Sites	3.4	2.8	2.3
Other Lodgings	19.2	19.4	16.4
Restaurants, Cafés, etc.	15.2	14.7	18.8
Bars	13.5	15.8	18.6
Catering Contractors	4.7	5.3	3.7
Total	**100.0**	**100.0**	**100.0**

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 28)

The following table shows that although hotels is the largest element within the sector, it experienced a below average rate of growth between 1993 and 2003. The biggest growth points were in restaurants, cafés and bars.

THE HOTELS AND CATERING SECTOR Change between 1993 and 2003 in order of sector importance			
	% in 2003	**Change 1993/2003**	**% pa 1993/2003**
Hotels	40.2	35.9	5.5
Other Lodgings	2.3	1.1	2.5
Bars	16.4	13.1	4.7
Restaurants, Cafés, etc	18.8	23.0	8.7
Catering Contractors	18.6	24.4	9.9
Camping Sites	3.7	2.4	3.8
Total	**100.0**	**100.0**	**6.4**

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 29)

The table below shows, the tourist activity is shared evenly across the county.

THE HOTELS AND CATERING SECTOR Change between 1993 and 2003 in order of district importance			
	% in 2003	**Change 1993/2003**	**% pa 1993/2003**
Restormel	22.2	20.6	5.8
Carrick	20.0	19.8	6.3
North Cornwall	16.2	17.1	6.9
Penwith	15.9	15.9	6.4
Caradon	12.3	12.0	6.2
Kerrier	12.0	13.3	7.4
Isles of Scilly	1.4	1.3	5.8
Total	**100.0**	**100.0**	**6.4**

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 30)

As shown in the following table, there is a mixture of 'hotspots' in economic activity in the hotels and catering sector throughout the county, with restaurants and bars featuring prominently.

THE 'HOTSPOTS' IN THE CHANGES IN THE COUNTY'S HOTELS AND CATERING SECTOR Change in output by sector and district: Quantitative contributions		
	% of total increase in 2003	**% pa 1993-2003**
Restormel - Hotels	9.1	5.0
North Cornwall - Hotels	6.6	6.0
Carrick - Hotels	5.6	4.7
Kerrier - Hotels	5.3	7.2
Penwith - Restaurants	4.8	9.2
Carrick - Restaurants	4.6	9.3
Restormel - Restaurants	4.6	8.4
Carrick - Bars	4.6	9.5
Restormel - Bars	4.5	9.2
Total	49.7	
County Total	**100.0**	**6.4**

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 31)

The performance of the sector is summarised in the following two tables. The first shows the percentage distribution of the total increase in output between 1993 and 2003 by sub-sector and by district. The second shows the same data expressed in terms of rates of growth between 1993 and 2003.

(description required)

HOTELS AND CATERING SECTOR SUMMARY 1993/2003 (%)
Change in output by sector and district: Quantitative contributions

	Caradon	Carrick	Kerrier	North Cornwall	Penwith	Restormel	Isles of Scilly	Total
Hotels	3.0	5.6	5.3	6.6	5.6	9.1	0.8	35.9
Camping Sites	0.0	0.2	-0.2	0.4	0.3	0.3	0.1	1.1
Other Lodgings	1.8	2.7	1.7	2.6	2.0	2.2	0.1	13.1
Restaurants, Snacks & Cafés	2.2	4.6	2.8	3.8	4.8	4.6	0.2	23.0
Bars	4.4	4.6	3.0	4.1	3.6	4.5	0.2	24.4
Catering Contractors	0.7	2.0	0.8	-0.4	-0.5	-0.3	0.0	2.4
Total	**12.0**	**19.8**	**13.3**	**17.1**	**15.9**	**20.6**	**1.3**	**100.0**

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 32)

HOTELS AND CATERING SECTOR SUMMARY 1993/2003 (% PA)
Change in output by sector and district: Relative rates of growth

	Caradon	Carrick	Kerrier	North Cornwall	Penwith	Restormel	Isles of Scilly	Total
Hotels	4.3	4.7	**7.2**	6.0	6.2	5.0	5.8	5.5
Camping Sites	-0.9	5.2	-4.1	6.1	**6.9**	2.1	**18.6**	2.5
Other Lodgings	5.8	3.8	**6.5**	5.7	3.5	5.2	5.9	4.7
Restaurants, Snacks & Cafés	6.1	**9.3**	**9.7**	**9.6**	**9.2**	**8.4**	5.5	**8.7**
Bars	**11.4**	**9.5**	**9.1**	**10.6**	**10.2**	**9.2**	4.7	**9.9**
Catering Contractors	5.7	**10.8**	**6.7**	-6.2	-11.2	-2.7	-1.3	3.8
Total	6.2	6.3	**7.4**	**6.9**	6.4	5.8	5.8	6.4

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table33)

Note: Bold figures indicate faster than average rates of growth

- **The Finance and Business Services**

The following table gives more detail for the finance and business services sector, which represented 15.1% of the Cornwall economy in 2003. It shows the dominant role of real estate activities. Banking services, as a share of the sector, declined between 1993 and 2003, reflecting the increased computerisation of services. There has been a strong increase in the output of computer services (17.9% per annum between 1993 and 2003) and in output of other business services (15.8% per annum between 1993 and 2003).

NET OUTPUT OF THE FINANCE AND BUSINESS SERVICES SECTOR (%)				
	1993	**1998**	**2003**	**1993/2003 % pa**
Banking & Finance	8.5	6.1	4.8	3.6
Insurance	1.9	1.5	1.6	8.1
Insurance Brokers	2.0	1.9	1.5	6.7
Real Estate Activities	58.5	59.2	55.0	9.0
Rent Movables	2.2	2.0	2.1	9.0
Computer Services	1.1	2.2	2.3	17.9
Research & Development	0.5	0.7	1.0	17.8
Legal Services	3.7	3.5	3.5	9.1
Accountants	4.2	4.2	3.8	8.6
Market Research	0.1	0.2	0.3	17.1
Management Consultants	1.7	2.5	3.6	18.0
Architects	7.1	6.5	5.7	7.3
Advertising	0.3	0.8	0.9	21.7
Other Business Services	8.1	8.6	14.0	15.8
Total	100.0	100.0	100.0	9.7

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 37)

The following table ranks the sector activity in order of importance of district in 2003.

THE FINANCE AND BUSINESS SERVICES SECTOR Changes between 1993 and 2003 in order of district importance			
	% in 2003	**% of total change 1993/2003**	**% pa 1993/2003**
Carrick	22.4	22.4	9.6
Restormel	18.9	18.7	9.5
Kerrier	17.3	17.6	10.1
North Cornwall	14.9	15.2	9.9
Caradon	13.7	13.2	9.1
Penwith	12.4	12.5	9.8
Isles of Scilly	0.4	0.4	8.4
Total	**100.0**	**100.0**	**9.7**

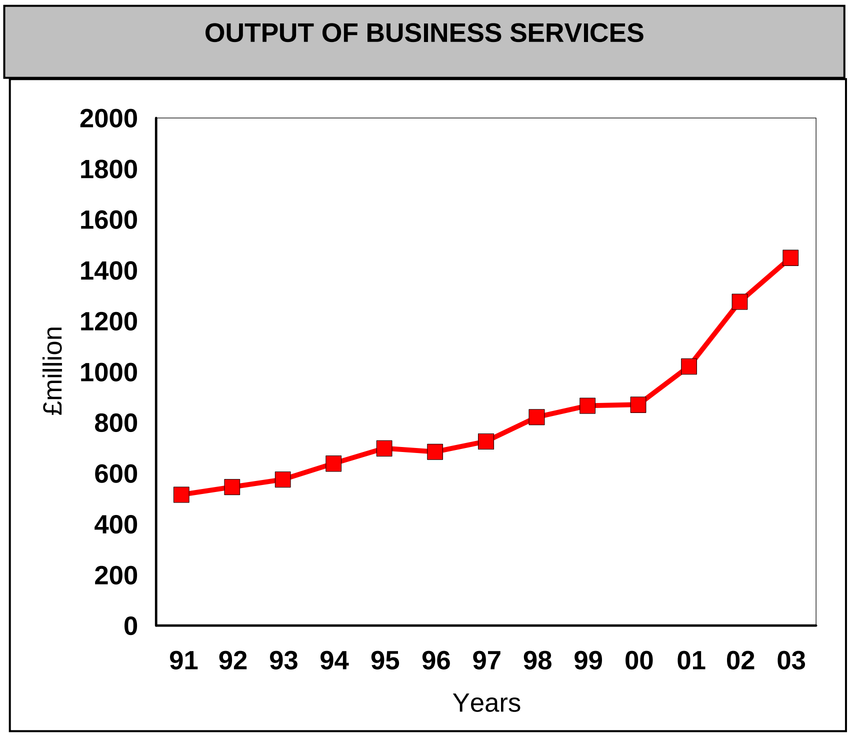
Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005

The following table identifies the key activities in order of importance of sub-sectors within districts.

THE 'HOT SPOTS' IN THE CHANGES IN THE COUNTY'S FINANCE AND BUSINESS SERVICES SECTOR		
	% of total change 1993/2003	% pa 1993/2003
Kerrier - Real Estate Activity	10.7	9.8
Restormel - Real Estate Activity	10.0	9.3
Carrick - Real Estate Activity	9.5	8.9
Caradon - Real Estate Activity	8.0	8.4
North Cornwall - Real Estate Activity	8.0	8.7
Penwith - Real Estate Activity	6.1	8.5
Carrick - Other Business Services	6.0	19.9
Penwith - Other Business Services	3.6	15.0
Restormel - Other Business Services	2.7	12.9
Caradon – Other Business Services	2.0	16.9
Total	66.3	
County Total	100.0	9.7

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 39)

The year on year movements in the output of the business services sector are shown in the chart below. The second half of the period, 1998 to 2003, grew at 12.0% per annum compared with 7.4% per annum between 1993 and 1998.



Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Chart 18)

The performance of the sector is summarised in the following two tables (Tables 40 and 41). The first shows the percentage distribution of the total increase in output between 1993 and 2003 by sub-sector and by district. The second shows the same data expressed in terms of rates of growth between 1993 and 2003.

FINANCE AND BUSINESS SERVICES SECTOR SUMMARY 1993/2003(%) **Change in output by sector and district: Quantitative contributions**								
	Caradon	Carrick	Kerrier	North Cornwall	Penwith	Restormel	Isles of Scilly	Total
Bank & finance	0.2	0.8	0.6	0.3	0.3	0.2	0.0	2.4
Insurance	-0.1	1.3	0.1	0.1	0.1	0.0	0.0	1.5
Ins Brokers	0.0	0.1	0.2	0.3	0.2	0.4	0.0	1.2
Real Estate	8.0	9.5	10.7	8.0	6.1	10.0	0.2	52.6
Rent Movables	0.5	0.4	0.2	0.4	0.1	0.3	0.0	2.0
Computer Services	0.5	0.5	0.9	0.6	0.3	0.4	0.0	3.1
Research & Development	0.0	-0.1	0.0	0.5	0.0	0.8	0.0	1.3
Legal Services	0.3	0.8	0.4	0.8	0.4	0.5	0.0	3.4
Accountants	0.5	0.8	0.5	0.7	0.4	0.6	0.0	3.6
Market Research	0.1	0.1	0.0	0.0	0.0	0.1	0.0	0.3
Man Consultants	0.4	1.1	0.8	0.7	0.4	1.3	0.0	4.8
Architects	0.7	0.8	1.1	1.0	0.5	0.7	0.0	4.8
Advertising	0.1	0.2	0.2	0.2	0.0	0.6	0.0	1.3
Other Business Services	2.0	6.0	2.0	1.6	3.6	2.7	0.0	17.8
Total	13.2	22.4	17.6	15.2	12.5	18.7	0.4	100.0

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005

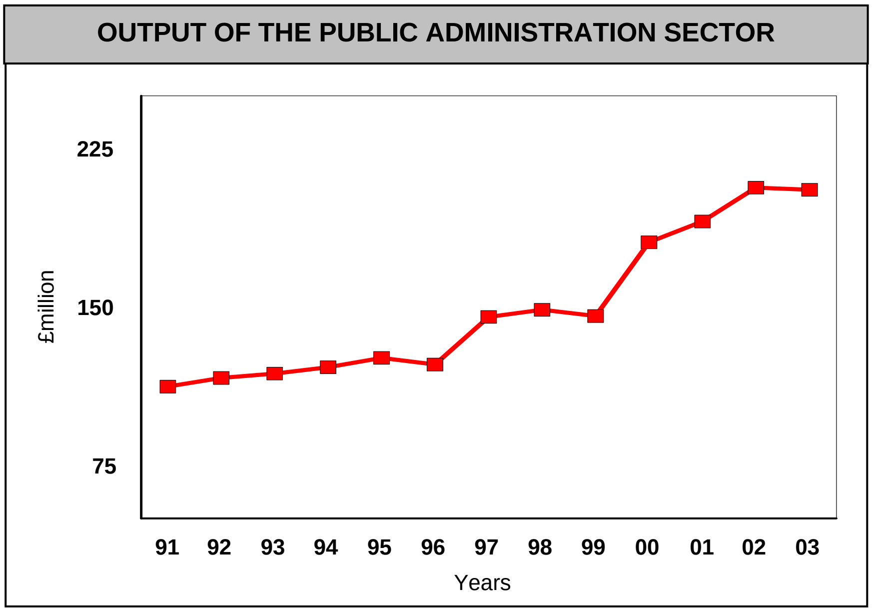
FINANCE AND BUSINESS SERVICES SECTOR SUMMARY 1993/2003(% PA) Change in output by sector and district: Relative rates of growth								
	Caradon	Carrick	Kerrier	North Cornwall	Penwith	Restormel	Isles of Scilly	Total
Bank & finance	3.3	3.8	6.8	2.5	4.4	1.7	**10.0**	3.6
Insurance	-4.8	**11.6**	5.4	6.1	7.6	4.1	**15.4**	8.1
Ins Brokers	-0.1	2.6	6.9	**10.2**	8.3	**14.3**	**15.2**	6.7
Real Estate	8.4	8.9	**9.8**	8.7	8.5	9.3	7.3	9.0
Rent Movables	**15.8**	6.3	9.5	**10.0**	9.9	6.7	4.3	9.0
Computer Services	**19.5**	**12.2**	**24.1**	**19.3**	**16.4**	**18.0**	**27.6**	**17.9**
Research & Development	0.0	-6.8	-6.0	**27.5**	0.0	**31.9**	0.0	**17.8**
Legal Services	8.3	8.6	7.9	**12.4**	**10.4**	7.5	**15.0**	9.1
Accountants	**9.8**	8.4	7.7	9.3	7.7	8.7	**15.1**	8.6
Market Research	**20.6**	**22.2**	**14.9**	8.7	**19.5**	**23.4**	**15.4**	**17.1**
Management Consultants	**12.9**	**21.9**	**21.3**	**18.0**	**18.5**	**17.0**	-0.1	**18.0**
Architects	9.7	4.3	9.6	**14.4**	7.7	4.9	**15.2**	7.3
Advertising	**18.9**	**20.9**	**25.4**	**15.6**	**11.1**	**26.7**	**54.7**	**21.7**
Other Business Services	**16.9**	**19.9**	**11.7**	**18.3**	**15.0**	**12.9**	7.3	**15.8**
Total	9.1	9.6	**10.1**	**9.9**	**9.8**	9.5	8.4	9.7

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005

Note: Bold figures indicate faster than average rates of growth

- **Public Administration**

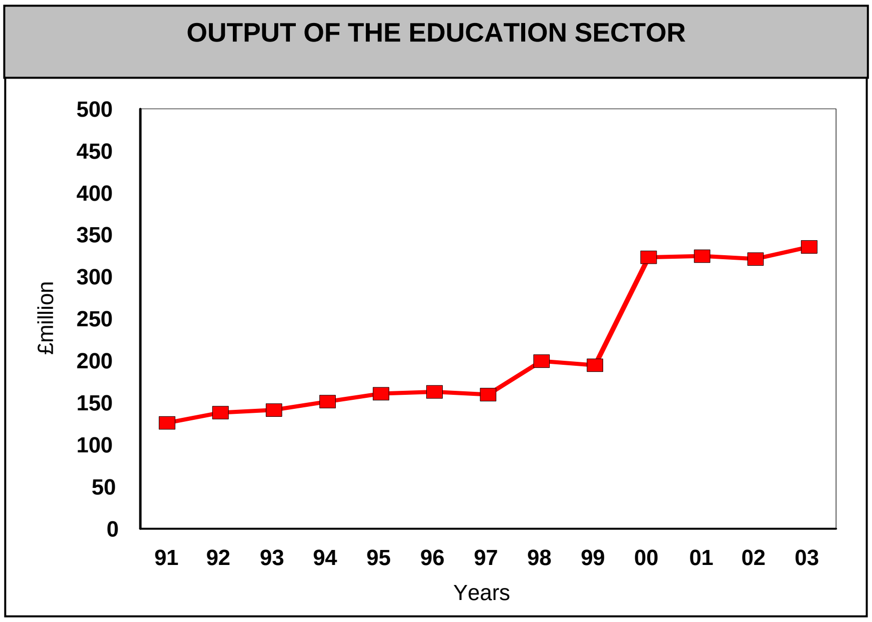
As the chart (Chart 19) below shows, although there was an average growth of 5.7% per annum over the decade 1993 to 2003, there was a marked difference between the two halves. Growth between 1993 and 1998, which was 4.6% per annum, rose to 6.7% per annum between 1998 and 2003.



Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Chart 19)

- **Education**

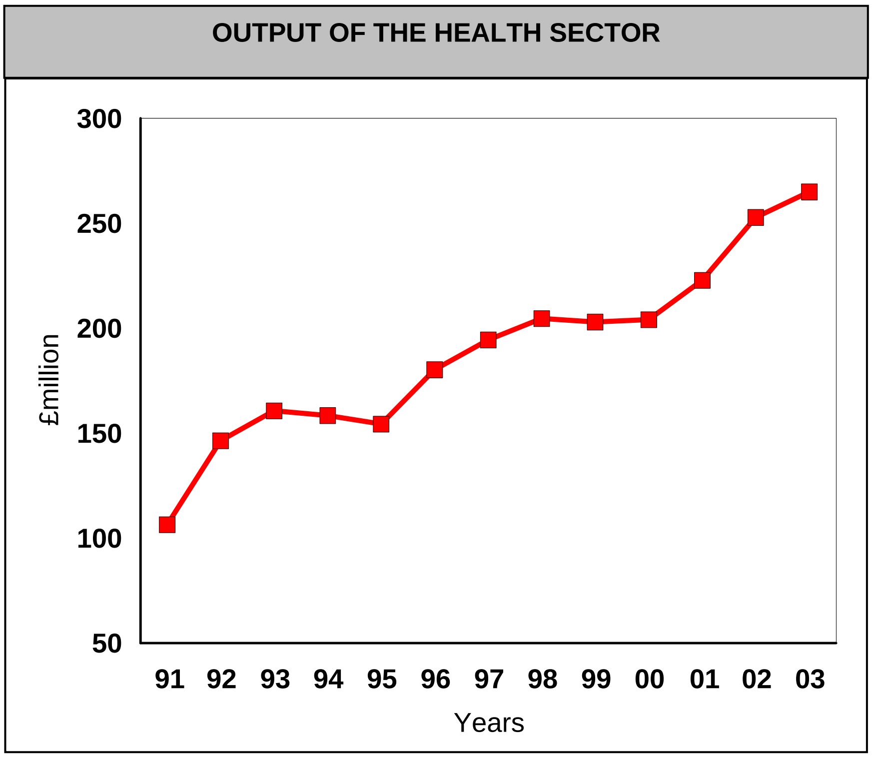
As the chart (Chart 20) below illustrates, there was a sharp increase in the output of the education sector between 1999 and 2000. Output grew between 1993 and 1998 by 7.1% per annum but it was followed by a strong growth between 1998 and 2003 of 10.9% per annum, giving an average of 9.0% per annum between 1993 and 2003.



Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005

- **Health**

As the following chart shows the health sector has shown steady growth in output since 1996. For the period 1993 to 1998 the sector grew by 4.9% per annum but accelerated to give a rate of growth of 5.3% per annum between 1998 and 2003. The overall rate of growth for the decade 1993 to 2003 was 5.1% per annum.



Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005

The Outcome for the Cornwall Economy 1993 to 2003

- **Summary**

An analysis of the sources of Cornwall's output growth between 1993 and 2003 can be approached in a number of ways. One way is to identify the source of the actual change in output over the period. This way makes it possible to pinpoint the contribution to growth either according to the district or to the industrial sector. Results for Cornwall on this basis are given in Table 45 below. With a total of 100% showing in the bottom right hand corner the percentage shares making up that total are given in each cell. The table does not look at relative rates of growth directly but it highlights the quantitative contribution of the various industrial sectors in each district.

The most significant contribution to the increase in Cornwall's output between 1993 and 2003 were, in terms of industrial *sectors,* manufacturing (10.6%), construction (6.9%), wholesale, retail and repair (26.3%) and business services (26.5%). These four dominant sectors together contributed more than 70% of the increase in total output for the county.

In terms of the relative contribution made by *districts* the four main districts were Carrick (22.9%), Restormel (18.0%), North Cornwall (17.6%) and Kerrier (16.8%), which accounted for some 75% of the total change.

Of the changes in actual output, the principal districts contributing to the change in *manufacturing* were North Cornwall (3.5%), Kerrier (2.0%), Carrick (1.7%) and Restormel (1.5%). The principal districts contributing to the increase in output of *wholesale, retail and repair* were Carrick (5.7%), Kerrier (4.5%), Caradon (4.4%) and Restormel (4.4%). The principal districts contributing to the increase in output in the *business services* sector were Carrick (5.7%), Restormel (5.0%), Kerrier (4.7%) and North Cornwall (4.1%).

The following table looks at all the sectors in the economy, ranking them in the first column by their share of output in 2003. The second column shows how the overall increase in output between 1993 and 2003 was shared out between these sectors, and the final column shows the rate of growth between 1993 and 2003 of each sector.

CHANGE IN OUTPUT BETWEEN 1993/2003 IN ORDER OF SECTOR IMPORTANCE			
	% in 2003	**% of Total change 1993/2003**	**% change 1993/2003**
Financial & Business Services	23.8	27.9	9.7
Wholesale, Retail & Repair	21.3	26.3	10.6
Manufacturing	10.8	10.6	7.3
Hotels & Catering	8.3	7.5	6.4
Construction	6.8	6.9	7.6
Education	5.5	6.2	9.0
Health	4.4	3.3	5.1
Other Services	4.2	4.7	8.9
Public Administration	3.4	2.8	5.7
Transport & Communication	3.3	2.4	4.9
Social Services	3.4	3.4	7.4
Agriculture & Forestry	2.4	-1.9	-3.5
Mining & Quarrying	1.4	-0.1	-0.3
Electricity, Gas & Water	0.6	-0.1	-0.9
Fishing	0.3	0.1	0.0
Sanitary Services	0.2	0.1	3.1
Total	100.0	100.0	7.5

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 1)

The following table presents the same information, but in terms of district contributions to total output and change in output between 1993 and 2003. This clearly highlights the even spread of activity over the whole county.

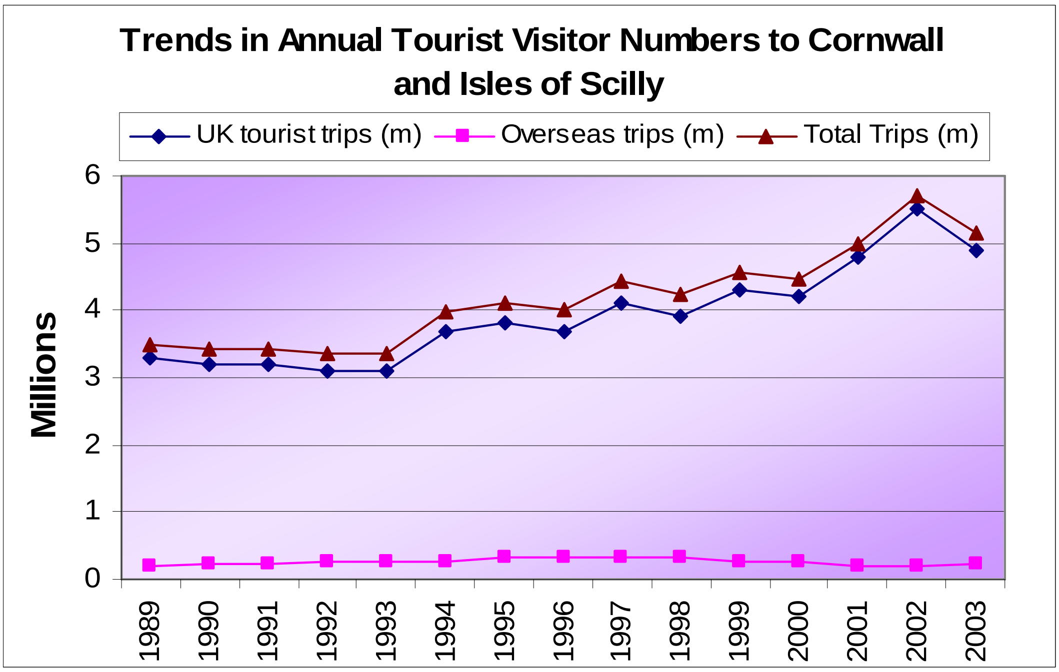
CHANGE IN OUTPUT BETWEEN 1993/2003 In order of District Importance			
	% in 2003	**% of total change 1993/2003**	**% change pa 1993/2003**
Carrick	21.9	22.9	8.0
Restormel	19.2	18.0	6.8
North Cornwall	17.3	17.6	7.7
Kerrier	16.5	16.8	7.7
Caradon	13.2	13.6	7.8
Penwith	11.3	10.6	6.9
Isles of Scilly	0.6	0.5	6.0
Total	100.0	100.0	7.5

Source: Owen Nankivell (LINC) – The Cornwall Economy 1993 - 2003 – Published June 2005 (Table 48)

- **A Profile of Cornwall's Tourism Industry**

Tourism is one of Cornwall's largest industries generating over £900 million of expenditure each year (Cornwall Tourism Strategy, 2000). It attracts approximately 5 million visitors a year and it is anticipated that these visitor numbers will remain fairly static during this decade (Structure Plan Deposit Draft 2002).

The chart below illustrates the growth in Cornwall's tourism industry over a 15 year period, between 1990 and 2000 the number of trips increased by one million (31.3%). Visitor numbers peaked in 2002 at 5.7 million but have since dropped by 10% to near 2001 levels 5.14 million in 2003 (South West Tourism).



Source: South West Tourism

Cornwall receives 20% of trips to the South West (Devon: 27%). It receives 25% of the region's nights and generates 25% of the region's spend. In 2003 total tourist spend exceeded £1.5 bn.

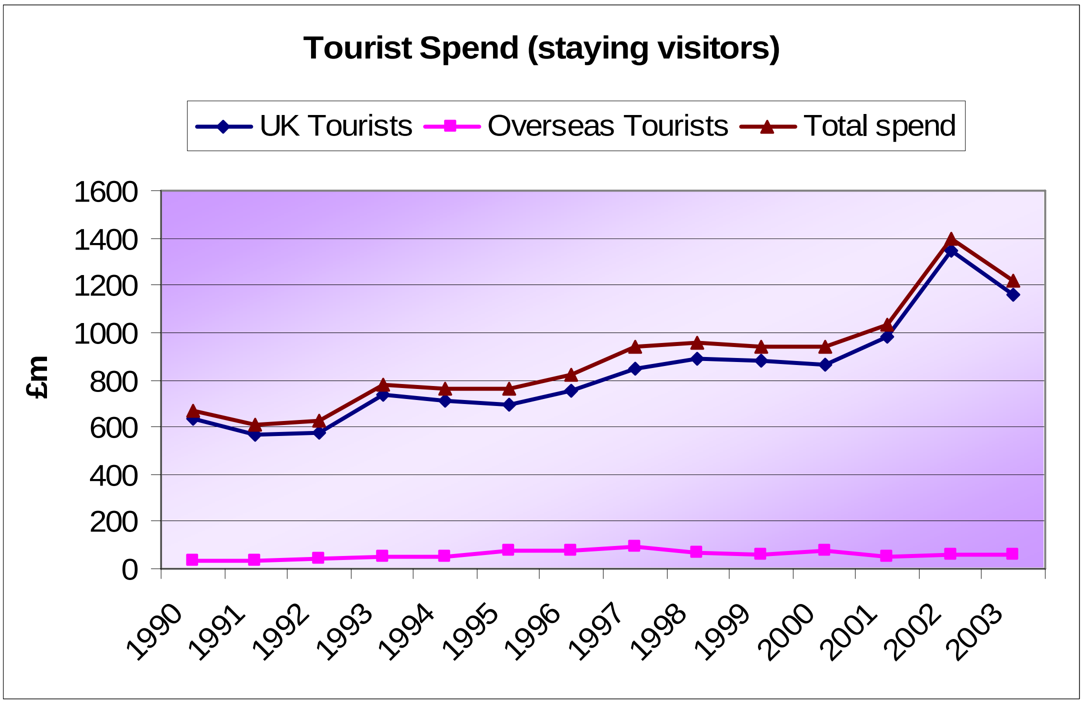
The domestic market is the biggest generator of trips, nights and spend to Cornwall and the county has the highest average length of stay per trip in the region (5.27 nights).

The self-catering accommodation sector is most important to Cornwall in terms of value (23% of nights and 24% of spend in the county). The serviced accommodation sector is most important based on volume.

Cornwall has the highest proportion of employed people working in tourism in the South West (25%, Devon: 13%) check population of Devon for proportional ratio and numbers.

Cornwall accounts for one fifth of total employment (FTE) related to tourism spending in the South West (21%). 26,732 full-time equivalent jobs are directly supported[8] by tourism in Cornwall. The largest number of jobs directly attributable to tourism are within the accommodation sector (10,293 FTEs).

[8] Spending by tourists directly employs people in businesses including: accommodation, catering, retailing, attractions/entertainment and transport (SWT, 2003)

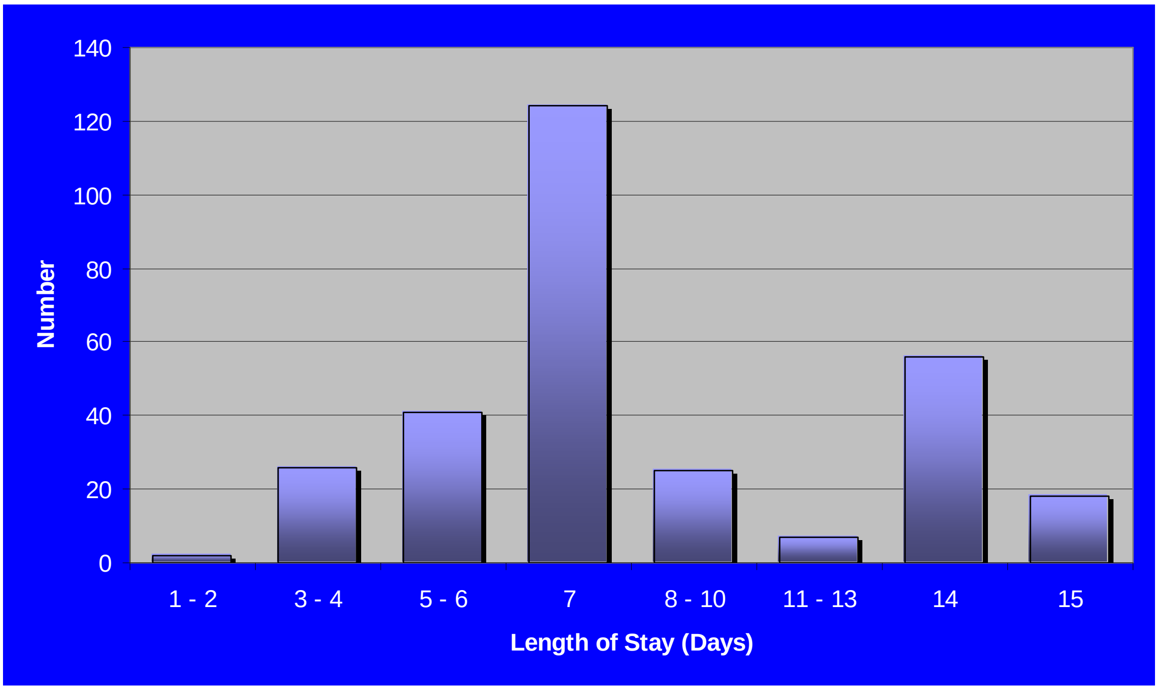


Source: South West Tourism

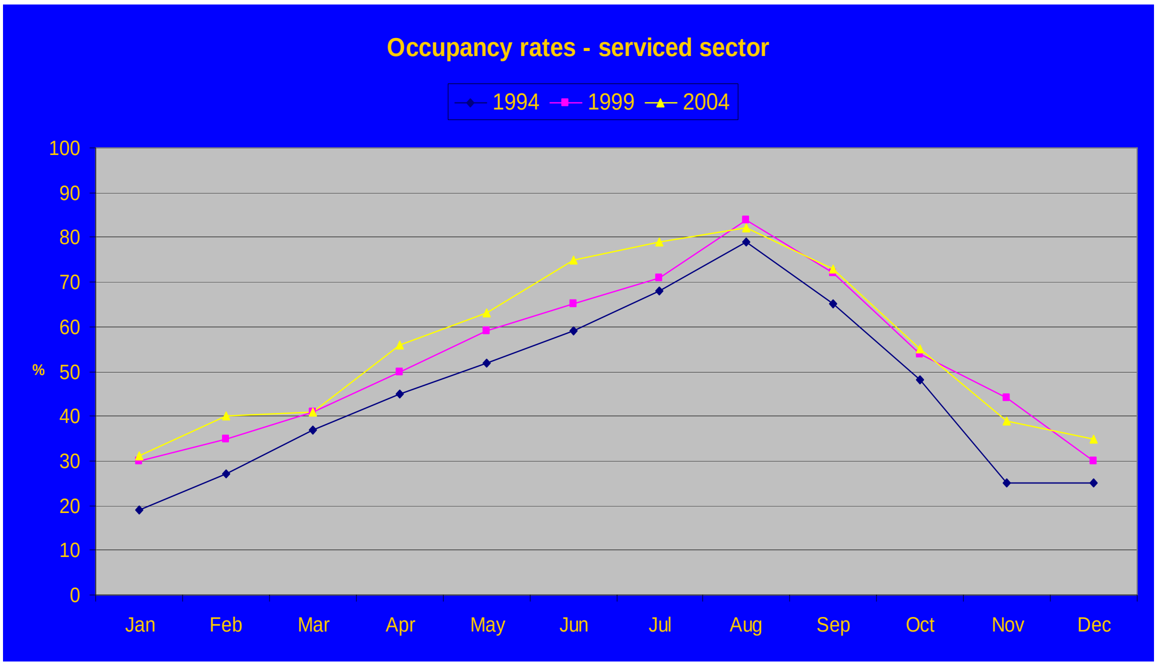
Gross Value Added (GVA) from the hotels and catering sector ranges from 6% of the economy in Kerrier to 11.6% in Penwith, compared to 21.5% in the Isles of Scilly (See table 1).

Table 1. GVA figures for hotel and catering sector by district	
North Cornwall	7.8%
Caradon	7.7%
Restormel	9.6%
Carrick	7.5%
Kerrier	6%
Penwith	11.6%
Isles of Scilly	21.5%
All figs for 2003. Source: Local GVA model, © Nankivell.	

Length of Stay 2003



Source: Cornwall Visitor Survey 2003



Source: SWT Occupancy Survey

Cornwall has one of the lowest average gross weekly earning figures in the country. The data below shows that the average earnings for the hotel and restaurant sector in Cornwall is lower still (see table 2).

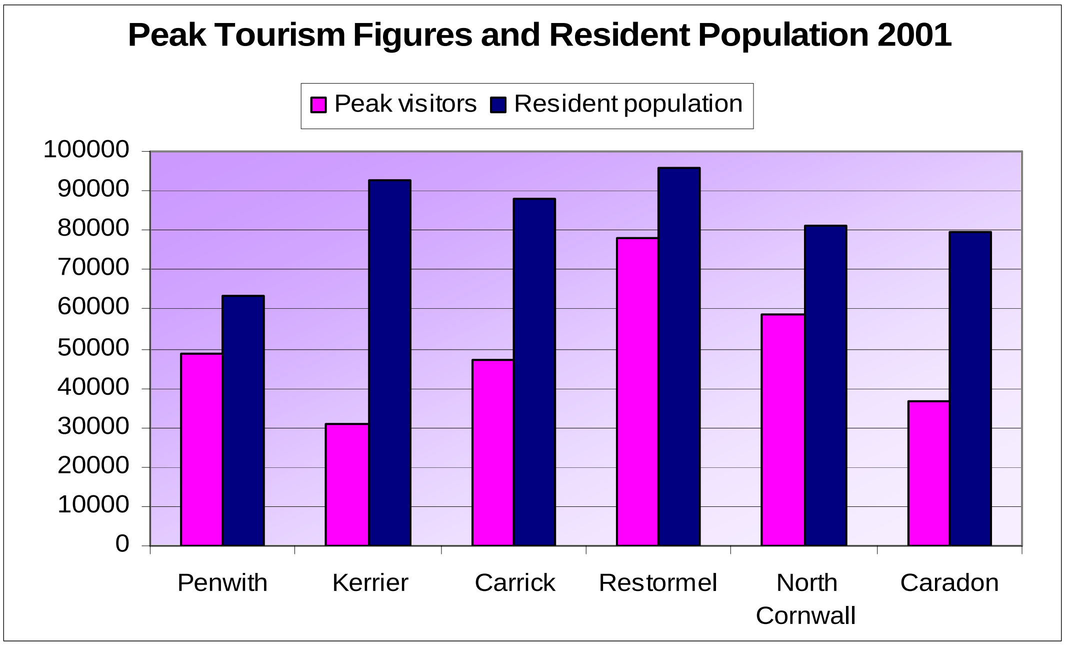
Table 2. Average gross weekly earnings for full time workers (median)		
	All sectors	Hotels & Restaurants
UK	£422.1	£266.2
Cornwall	£329.5	£207.8

Source: Annual Survey of Hours and Earnings,- ONS Crown Copyright

Average earnings for the hotel and restaurant sector in Cornwall amount to 63% of the average earnings for all sectors in Cornwall and 78% of the average for UK hotels and restaurant sector.

Peak Season

The peak season visitor numbers used in the chart below are based on estimates produced by the Research and Information Unit, Cornwall County Council. Estimating the peak number of visitors present in Cornwall at any one time during the year is very difficult. In the past this was facilitated by biennial surveys of touring camping and caravanning sites but these have been discontinued. It seems that peak numbers were at their highest in 1978 with 288,000 visitors. By the early 1990's numbers were down to about 250,000 since when they recovered to an estimated 272,000 in 1996. It is possible that in 2001 the peak reached 300,000 but this is not supported by specific survey evidence.



Source: Research and Information Unit – Cornwall County Council

The chart above illustrates the maximum number of visitors staying in an area within each district on one given day during the peak season (the first two weeks in August) alongside the resident population in 1996. Penwith, Restormel and North Cornwall all received over half the resident population again in staying visitor numbers.

In 1996 during peak week in August an estimated 272,300 tourists were staying in Cornwall. This compares with 299,500 in 2001. Over the years tourism has become less peaked, the season has extended and the ratio of residents to peak holiday visitors has fallen.

In 1996 it was estimated that Cornwall attracted approximately 8.5 million non local day trips and 32,416,000 local day trips. Of these trips 38% were to rural locations, 35% to the coast and 27% to the main towns.

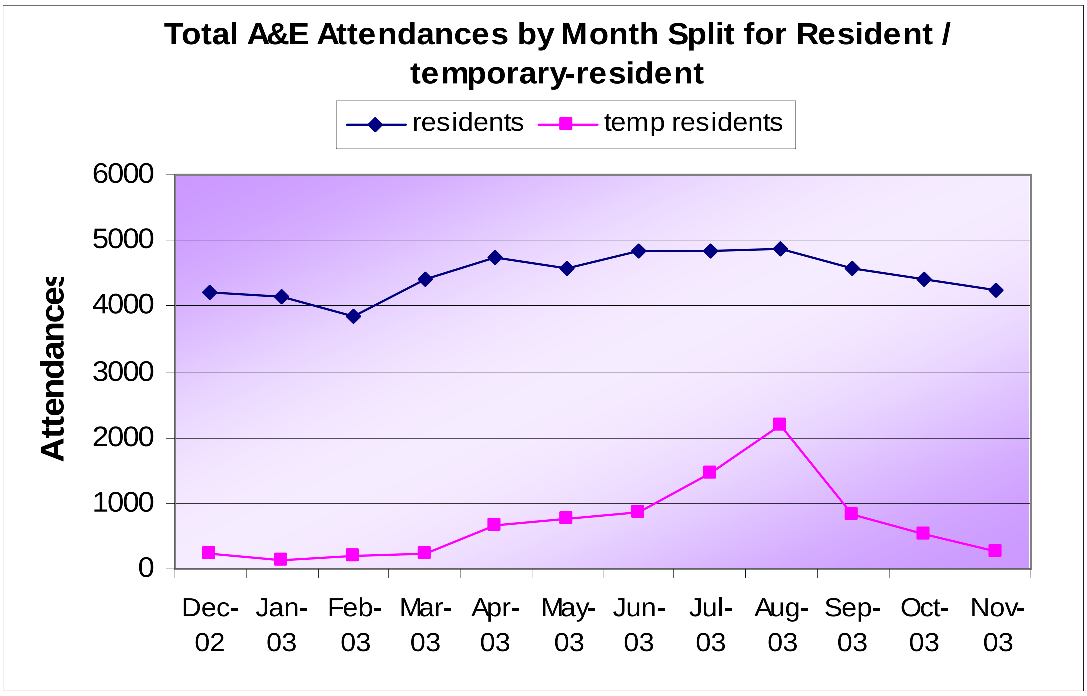
Landscape motivated tourism

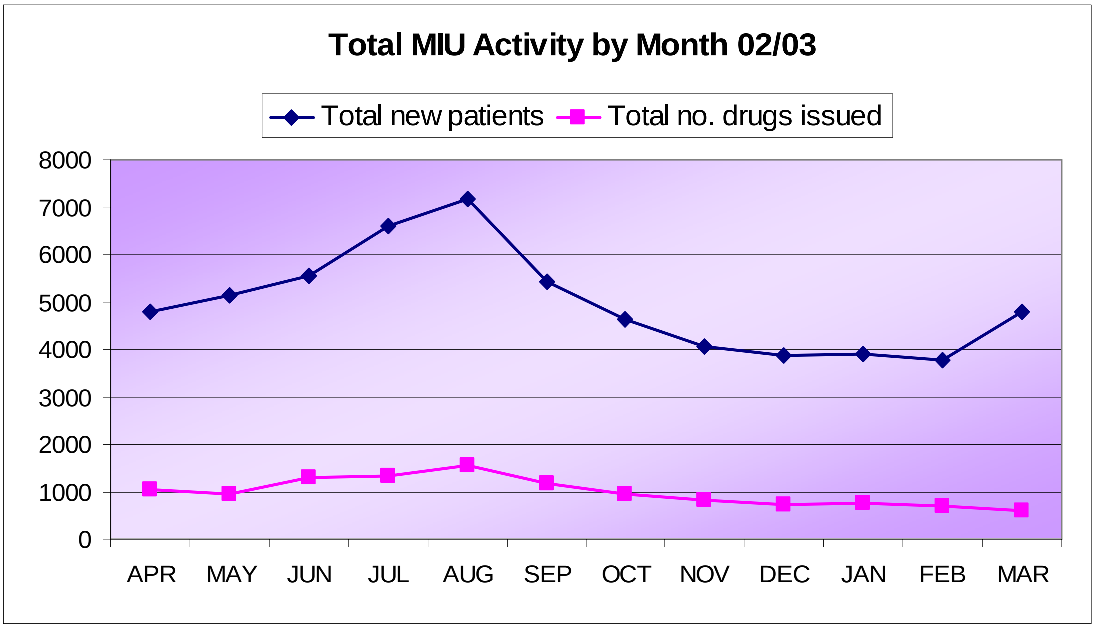
The research study 'Valuing our environment' undertaken on behalf of the National Trust in 1999 examined the economic impact of conserved landscapes in the South West. The report suggested that 3 million tourist trips to Cornwall in 1997 were conserved landscape motivated. This equated to approximately two thirds of total trips and had an associated spend of £694 m.

It also concluded that 14,000 FTE jobs were supported by conserved landscape motivated holiday trips and 6,900 were indirectly supported. In terms of actual jobs this brought the total number supported to 28,500.

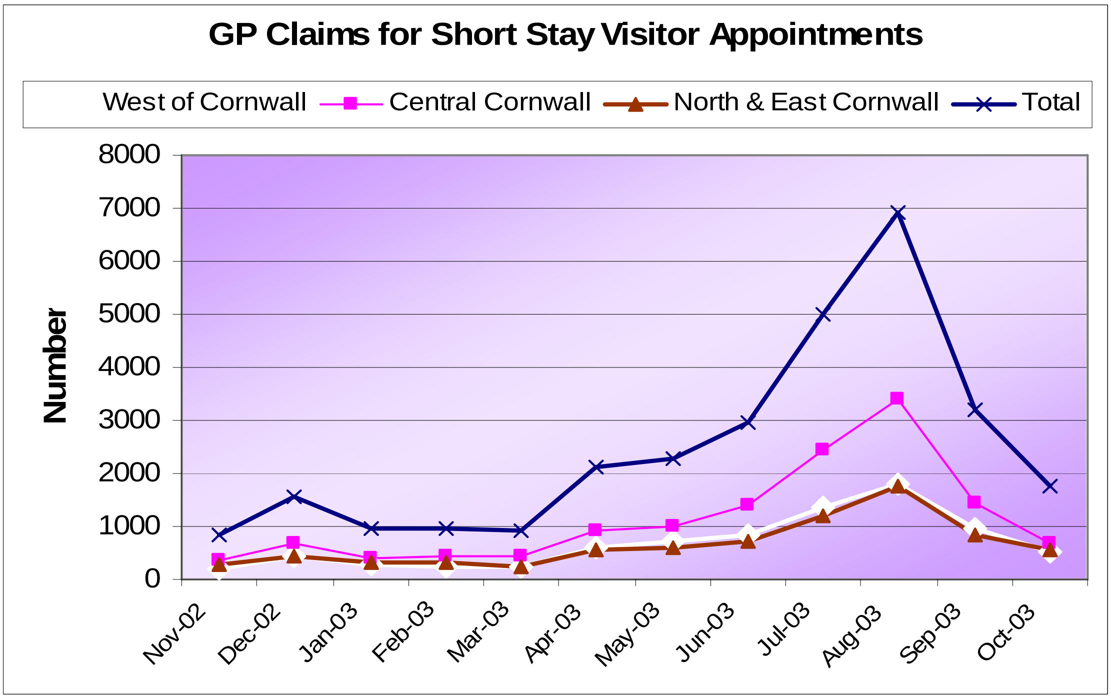
Impact of tourism on health services

Tourism has significant impacts on infrastructure and statutory services, particularly health services. The chart below illustrates the scale of out of area treatments (OATs – treatments administered to non-residents) throughout 2003. OAT treatments account for nearly half the amount of treatments administered to residents in August (Royal Cornwall Hospitals Trust).

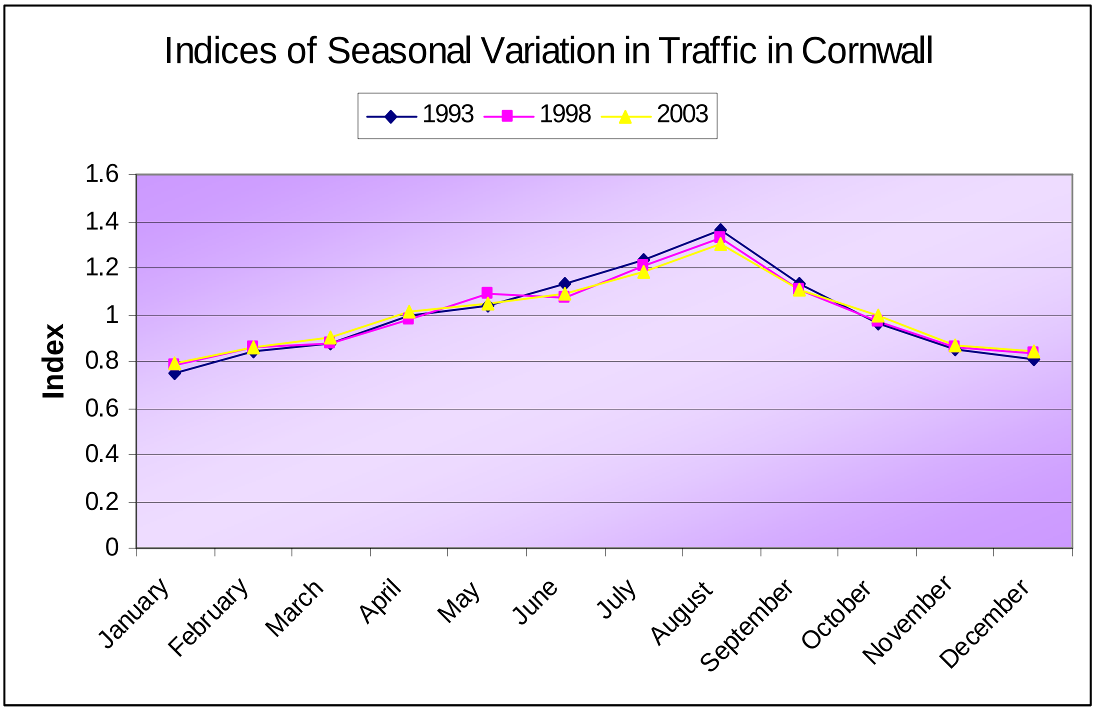




The chart above shows that the total new patients received by Minor Injury Units (MIUs) across the county during 2002/03 peaked in August 2002 at 7183. Central PCT received the highest number of new patients in this month: 3347 (46.6% of the total) with North & East PCT claiming 3286 (45.7%). West Cornwall PCT hospitals received 550 new patients during this month. As a consequence drugs issued by MIUs also peaked during August (1548).



The chart above shows that in 2003 claims submitted for GP appointments with short stay visitors (in the area for up to 15 days) in August amount to 6938 (Primary Care Trusts in Cornwall, 2004). This figure excludes 17 PMS practices (those which opted for the Personal Medical Services system which operates within a fixed budget and therefore does not require GPs to make claims for short stay patients seen).

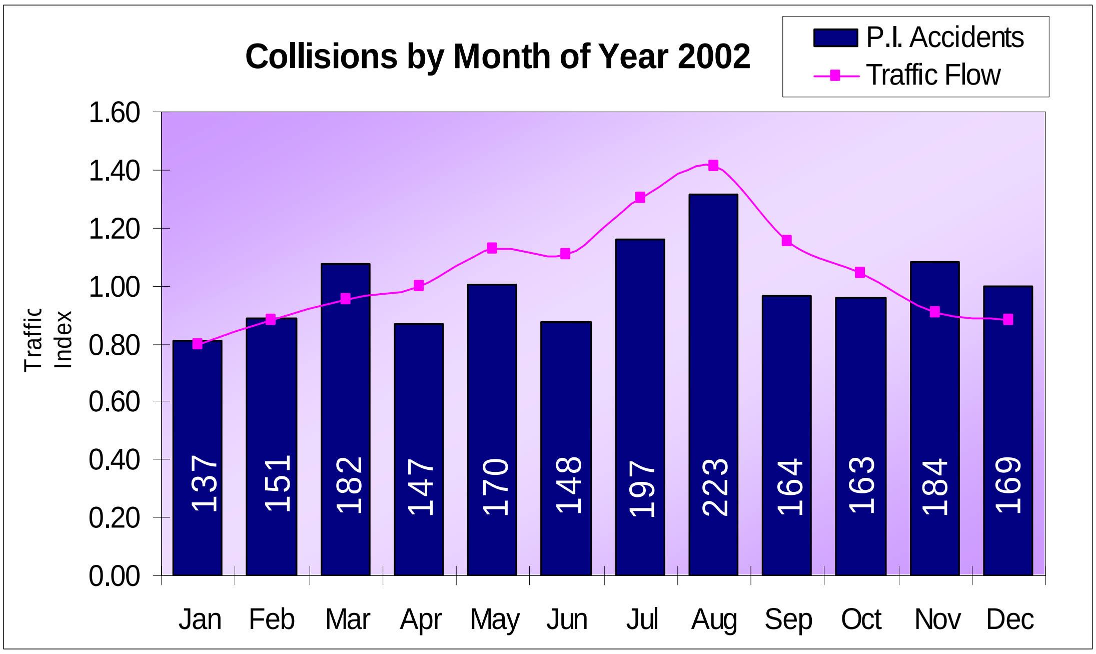


The index of seasonal variation for a particular month is the ratio of the average daily flow in that month to the average daily flow for the year as a whole. The flows recorded at all permanent counter sites within the County are aggregated for the purposes of calculating these indices. August volumes in 2002 were 30% higher than average daily volumes recorded throughout the year, and 66% higher than those recorded in the quietest month (January). Within these indices there are localised extreme flows such as the B3306 Zennor, at which flows in August are over four times those recorded in January.

Seasonal variation in traffic has declined over the last 20 years but this is attributed to by out of season growth in conjunction with more modest peak season growth. This is due to year round growth generated by Cornwall's resident population and extended holiday seasons – more tourists visiting Cornwall in the shoulder season.

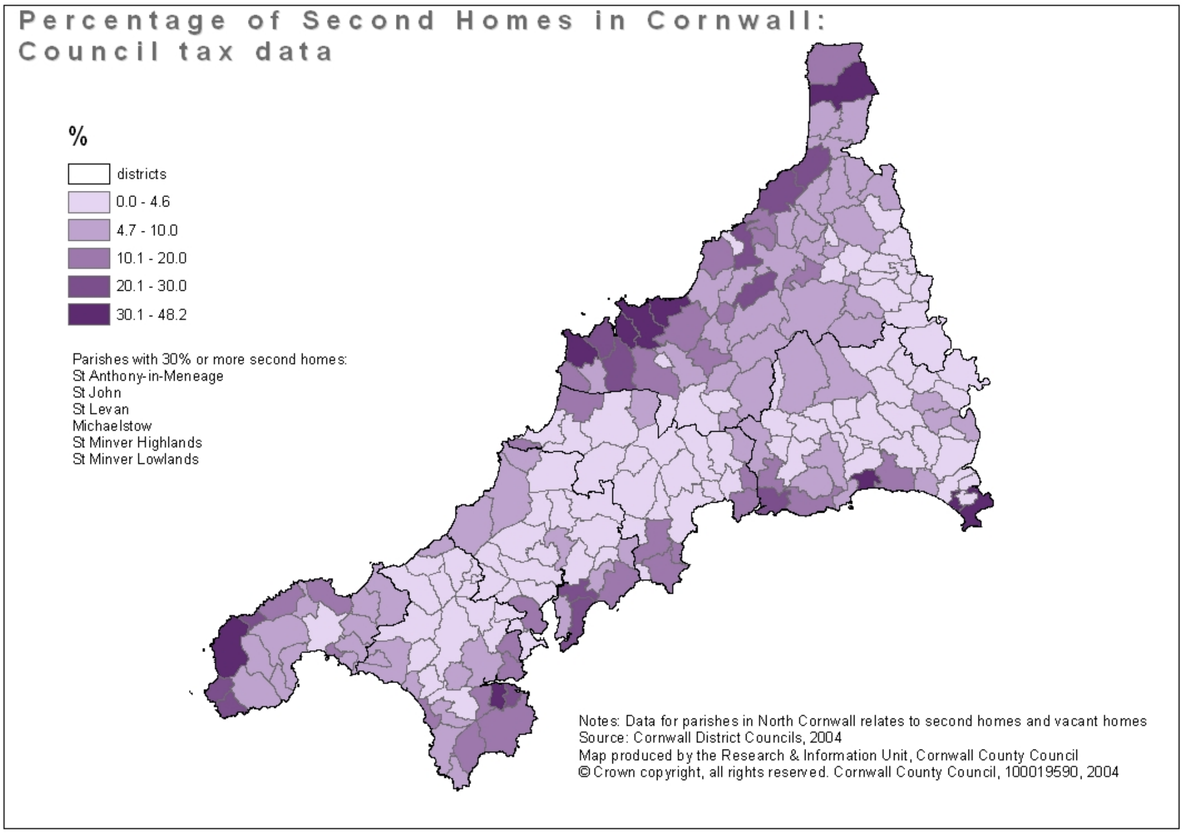
In 1998, 91% of tourists reached Cornwall by car with over 40% of visitors arriving during peak season months (July & August). Many of Cornwall's tourism destination 'honeypots' are not well served by public transport so there is little incentive for visitors to choose alternative modes of transport to reach holiday destinations and visitor attractions.

Greater volumes of traffic in peak season has several consequences including increased air pollution, difficulty for emergency services getting around the county and meeting target arrival times and higher levels of road traffic collisions, some of which result in personal injury. The chart below illustrates a clear correlation between seasonal traffic volume and personal injury collisions.



Second home ownership

According to the 2001 Census 5% of homes in Cornwall are second homes or holiday lets and this is likely to be a conservative figure. Based on council tax data second home ownership is greater than 30% in some communities do county fig. High levels of second home ownership can have significant impacts on communities and the viability of local services. In 2001, 78,000 tourist trips were made to second homes in Cornwall, 1.6% of total trips. In terms of spend associated with second home trips less than 1% of total tourism spend is attributed to this sector (£9,300,000), (SWT 2003). The map below shows the pattern of second home ownership which is largely concentrated in coastal and rural areas.



South West Ecological Footprint: Key findings on Tourism

Tourist accommodation consumed 4,512 GWh of energy

This could be reduced to 2,707 GWh by adopting energy saving measures. Energy use would increase to 9,723 GWh, if the season extends and tourist numbers increase without adoption of energy saving measures.

Tourist accommodation generated an estimated 120,000 tonnes of waste, of which:

32,620 tonnes was recycled (27%)***,*** 45% went to landfill

Tourists travelled an estimated 9.8 billion kilometres to and from the region

91% was by car, and 4% by train for domestic visitors***,*** 76% was by air for overseas visitors

Tourists consumed an estimated 26,109 million litres of water in all types of accommodation, an average of 394 litres of water per guest bednight

Community Attitudes to Tourism

South West Tourism (SWT) undertook a survey of 2800 SW residents in 2004, 400 per county. The survey revealed the following key points:

- 21% of those surveyed in the region were involved or someone in their household was involved in tourism. In Cornwall the figure was 27% (the highest). In Former Avon the figure was 15% (the lowest).
- 89% were proud to live in an are worth visiting, particularly evident in Cornwall, where 77% strongly agreed
- At the regional level 17% felt that visitors affect their lives 'a lot' For Cornwall the figure was 42%.
- The survey results show mainly positive perceived impacts of tourism in the SW including 'more income for local businesses', 'better choice of cafes / restaurants and shops' and a wider range of attractions and leisure facilities.
- Negatives were identified as traffic congestion and parking problems (SW: 77%, Cornwall: 95%), poorly paid, part-time and seasonal jobs (SW: 64%, Cornwall: 89%, seaside resorts: 75%) and second homes - only 41% in the SW agreed overall that this was a negative impact, but in Cornwall the figure was 85%.
- In the SW 18% felt that there were too many visitors for summer tourism levels, in Cornwall 42% felt there were too many.

Clearly more research needs to be undertaken to help understand the true social impact of tourism and resulting attitudes towards it.

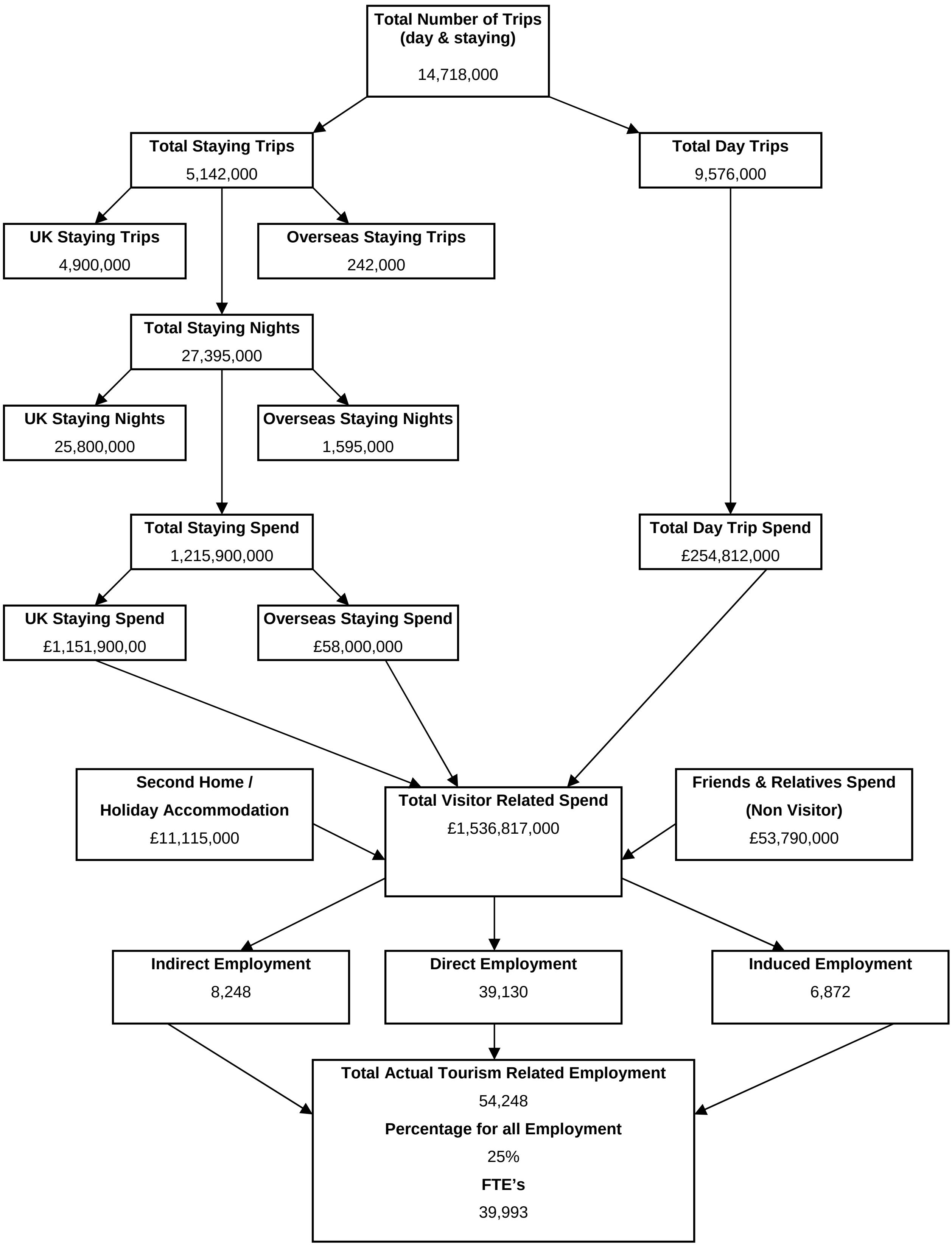
Known Costs of Tourism in Cornwall

- Need to sustain the nature of the coastline and natural environment which tourists value
- Cost of maintaining and paying for a higher level of basic infrastructure than the resident population might otherwise need
- Seasonal patterns of delivery, which places an inherent inefficiency in capacity to deal with peaks and troughs in health, police, social services and other services
- Cost of providing a widespread lifeguard service to safeguard visitors
- Detrimental effect on local businesses and service providers due to increased road traffic and congestion
- Higher levels of waste and cost of disposal
- Increased demand on the health and other services at peak times leads to additional costs such as staff overtime
- Increased cost of maintaining the road network due to voluntary agreement that works are not carried out during the summer months.

Known Benefits of Tourism in Cornwall

- Provides income for approximately one third of the workforce
- Significant contribution to Cornwall's economy
- Promotes Cornwall to the world
- Tourism may help maintain the viability of some services such as Community hospitals which benefit residents

Cornwall: Facts at a glance

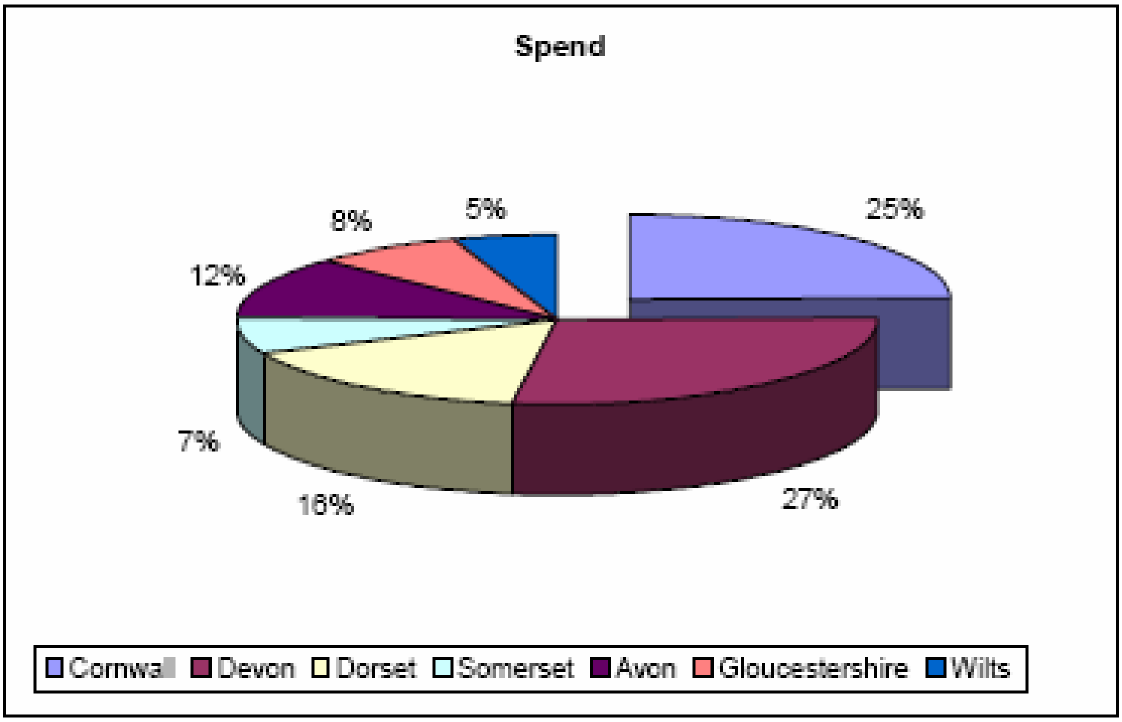


Source :Southwest Tourism

Cornwall Summary

Key Facts for Comparison			
	2001	**2003**	**% difference**
Domestic Trips	4,800,000	4,900,000	2%
Domestic Nights	22,700,000	25,800,000	14%
Domestic Spend	£979,700,000	£1,157,900,000	18%
Overseas Trips	200,00	242,000	21%
Overseas Nights	1,475,000	1,595,000	8%
Overseas Spend	£55,000,000	£58,000,000	5%
Other tourism related spend	£76,177,000	£64,905,000	-15%
Tourism related jobs (Estimated actual)	62,838	54,248	-14%
% of employment supported by tourism	29%	25%	-4%

	Trips	Nights	Spend
Cornwall	5,142,000	27,395,000	£1,215,900,000
Devon	6,824,000	30,331,000	£1,343,600,000
Dorset	4,520,000	18,684,000	£794,600,00
Somerset	2,185,000	9,063,000	£340,011,000
Avon	3,238,000	10,111,000	£576,927,000
Gloucestershire	1,938,000	6,701,000	£370,200,000
Wilts	1,843,000	5,749,000	£259,500,000
Totals	25,690,000	108,034,000	£4,900,738,000



Cornwall: Employment in detail

Key Facts:

Cornwall Accounts for 21% of the total employment related to tourism spending in the South West and 25% of all employment in the country.

Some 26,732 full-time equivalent jobs are directly supported by tourism in Cornwall.

The largest number of jobs directly attributed to tourism in Cornwall is in the accommodation sector (10,293 FTE's)

Estimated actual number of jobs related to tourism spending

	Staying Tourists		Day Visitors		Totals
Direct	33,029		6,100		39,130
Indirect	7,188		1,058		8,246
Induced	6,595		278		6,872
Totals	**46,812**		**7,436**		**54,248**

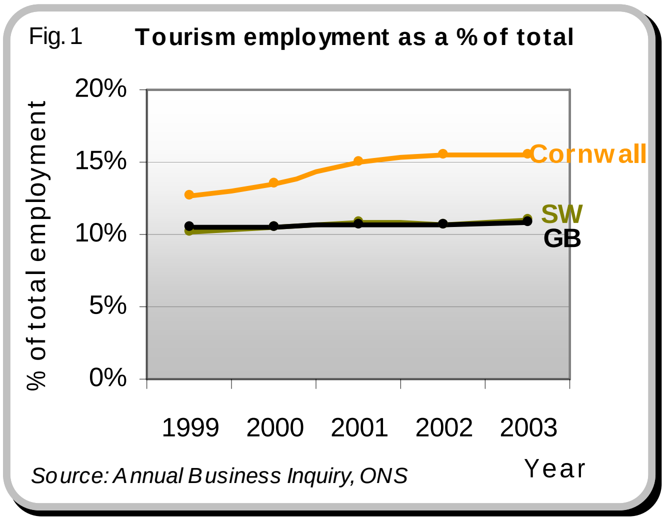
Estimated actual number of jobs related to tourism (FTE's)

	Staying Tourists		Day Visitors		Totals
Direct	22,619		4,113		26,732
Indirect	6,305		928		7,233
Induced	5,785		244		6,028
Totals	**34,708**		**5,285**		**39,993**

Direct employment in businesses in receipt of visitor expenditure – Estimated number of full time job (FTE's)

	Staying Tourists		Day Visitors		Totals
Accommodation	10,245		47		10,293
Retailing	2,124		1,102		3,226
Catering	5,635		2,203		7,837
Attractions/entertainment	2,391		556		2,947
Transport	1,193		205		1,399
Arising from non trip spend	1,030		0		1,030
Totals	**22,619**		**4,113**		**26,732**

Tourism Employment



1. Over 28,000 jobs in Cornwall are in the tourism sector in Cornwall.
2. Between 1999 and 2003, jobs in this sector have increased by 48.8% locally, compared to 17.3% and 7.3% in the South West and GB, respectively.
3. In 2003, 47.3% of the employment in the sector was full time; this is slightly lower than the SW and GB proportions.
4. As a proportion of total employment (see figure 1), the tourism industry has grown from 12.7% in 1999 to 15.6% in 2003.
5. On the other hand, tourism jobs in both the South West and GB have remained at between 10 and 11% of the total employment over the same period.

The employment figures in this profile refer to the number of jobs in the tourism sector. Figure 1 uses the total figure, thus incorporating both part and full time work.

Tourism sector

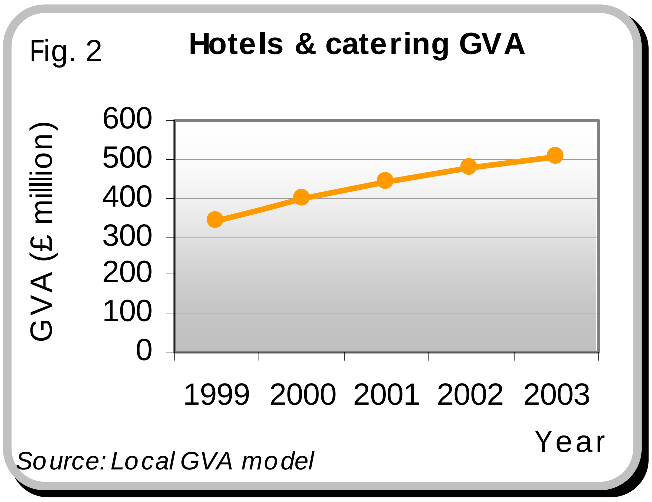
	Part time	Full time	Total
1999	9,240	9,708	18,945
2000	10,011	11,600	21,609
2001	13,518	11,908	25,423
2002	13,160	14,409	27,570
2003	14,849	13,345	28,193
% change	60.70%	37.46%	48.81%

Tourism employment as a % of total

	Cornwall	SW	GB
1999	12.7%	10.2%	10.5%
2000	13.6%	10.6%	10.5%
2001	15.0%	10.8%	10.6%
2002	15.5%	10.7%	10.7%
2003	15.6%	11.1%	10.9%

Source: Annual Business Inquiry ONS © Crown Copyright

Gross Value Added



Source: LINC Cornwall Sector Profile

1. Although hotels and catering (including all visitor accommodation) does not capture all tourist activity, it gives a good indication of changes in activity.
2. The district economic reports estimate that hotels and catering make up between 40 and 50% of the wider value of tourist activity, with the highest proportions being in Penwith and Restormel.
3. Figure 2 shows that in absolute terms, the sector has grown from £343 million in 1999, to £504 million in 2003 (10.1% p.a. [per annum]), this growth rate is in line with the Cornwall economy as a whole.
4. In 2003, the hotels and catering sector made up 8.3% of the Cornish economy, compared to 3.3% nationally.
5. The growth rate in hotels and catering for both employment and GVA has largely been driven by restaurants and bars. However, it appears that the expansion of the bars industry is more productive than the restaurants as table 1 opposite shows: for the 12.7% p.a. increase in bar employment, there has been a 14.8% p.a. increase in GVA.

	Growth rate (% p.a. [per annum])	
	Employment	GVA
Restaurants	16.2 %	15.7 %
Bars	12.7 %	14.8 %

Source: LINC Cornwall Sector Profile Table 1

The following tables provide the raw data from which the graphs shown previously were produced.

Hotels & catering GVA (£ million)

	Cornwall	UK
1999	343.1	26,458
2000	397.6	28,045
2001	443.8	29,520
2002	474.3	31,191
2003	503.9	32,633

Hotels & catering GVA (% of total)

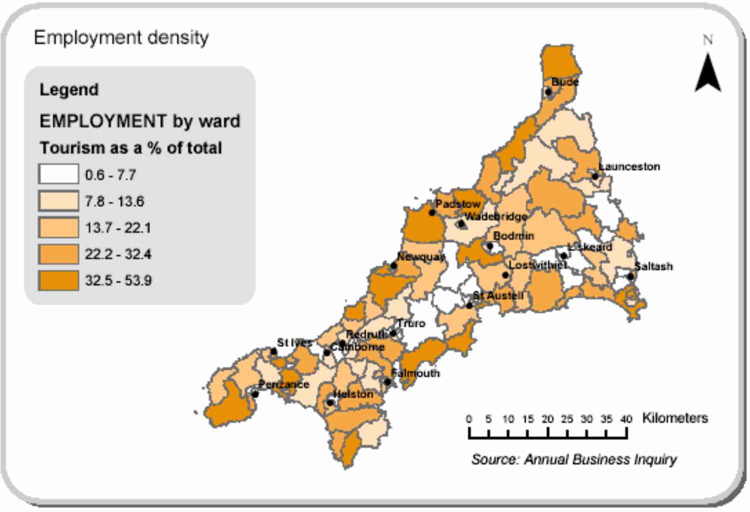
	Cornwall	UK
1999	8.5%	3.3%
2000	9.0%	3.3%
2001	9.1%	3.3%
2002	8.6%	3.4%
2003	8.3%	3.3%

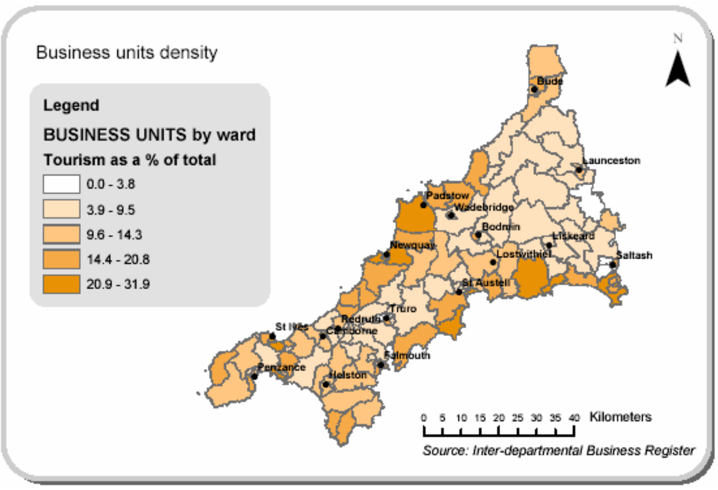
Source: Local GVA model © Nankivell 2005 & ONS © Crown Copyright

Spatial Distribution

The 2 figures below (3 and 4) map the employment and business unit (i.e. premises) density for food and drink manufacturing (Nb. The scales are different for each map).

The maps show that although there is a reasonably even spread of tourism business across the county (fig. 4), the larger employers are located on the coastal areas, particularly the north coast.





Source: LINC Cornwall Sector Profile

TOURIST ATTRACTION – VISITOR NUMBERS						
Resource Name	**Visits 2000**	**Visits 2001**	**Visits 2002**	**Visits 2003**	**Visits 2004**	**Diff.**
Truro Cathedral	500000	500000	500000	200000	200000	**0%**
Trewithen Gardens	16600	13671	17813	17654	16820	**-5%**
Trerice	44261	45125	57126	61237	56179	**-8%**
Trengwainton Garden	40339	40577	49679	53462	47996	**-10%**
Trelissick Garden	91893	96708	115000	125000	115000	**-8%**
Trebah Garden	105160	120339	137168	130000	127000	**-2%**
Tintagel Old Post Office	39784	39000	45000	45500	45500	**0%**
Tintagel Castle	203997	186462	209638	191266	180725	**-6%**
The Minack Theatre and visitor Centre			161828	174670	169011	**-3%**
Tamar Valley Donkey Park	20000	17000	20000	21000	25000	**19%**
Tamar Cruising			375000	375000	400000	**7%**
St Michael's Mount	185674	188803	215240	203769	206557	**1%**
St Mawes Castle	32909	35049	35820	35819	32539	**-9%**
St Austell Brewery Visitor Centre	10000	10000		6000	6200	**3%**
Springfields Pony Centre & Fun Park			30000	38190	41511	**9%**
South East Cornwall Discovery Centre	51943	66392	79287	70000	67000	**-4%**
Screech Owl Sanctuary	28000	31500	33167	34566	34594	**0%**
Saint Ives Society of Artists	19400	18400	18000	18000	22000	**22%**
Restormel Castle	21402	14999	22585	21919	20697	**-6%**
Penlee House Gallery & Museum	35712	33608	36967	34800	32810	**-6%**
Pendennis Castle	73834	69962	68832	65319	60742	**-7%**
Pencarrow House & Garden	19277	17745	20941	22676	20175	**-11%**
North Cornwall Museum & Gallery	2080	2500	2500	2000	2000	**0%**
Newquay Zoo	220000	230000	230000	194565	194926	**0%**
Newlyn Art Gallery	26906	28574	26896	28678	28172	**-2%**
Museum of Submarine Telegraphy	15416	14395	17046	15000	17200	**15%**
Museum of Cornish Methodism	350	330	300	250	230	**-8%**
Monkey Sanctuary	32797	40000	33266	34000	32000	**-6%**
Mevagissey Folk Museum			7742	5449	8571	**57%**
Little Western Railway			18000	16000	15500	**-3%**
Levant Steam Engine	13561	14791	15421	15925	17321	**9%**
Launceston Castle	22980	20770	21312	19310	17738	**-8%**
Isles of Scilly Steamship Co.		130033	134577	95757	93351	**-3%**
Isles of Scilly Museum	13400	13400	14000	16000	16500	**3%**
Holywell Bay Fun Park	100644	101153	97930	100000	100000	**0%**
Goonhilly Satellite Earth Station Experience	80000	80000	80000	82006	72798	**-11%**
Glendurgan Garden	58000	59722	66000	73189	74750	**2%**
Geevor Tin Mine & Heritage Centre	29592	22819	31378	32377	36003	**11%**
Falmouth Art Gallery	31000	37813	50201	51426	49712	**-3%**

Eden Project	498000	1700000	1832482	1404372	1223959	**-13%**
Cotehele House	75027	68369	86600	97000	96000	**-1%**
Cornish Mines & Engines			15680	15111	13613	**-10%**
Cornish Cyder Farm	285000	330000	355000	340000	330000	**-3%**
Copeland China Collection	700	750	600	500	800	**60%**
Chysauster Ancient Village	15579	15872	17958	16904	14082	**-17%**
Cheese Farm (The)	7000	4792	8279	14000	12000	**-14%**
Charlestown Shipwreck & Heritage Centre				57479	59560	**4%**
Carnglaze Slate Caverns		1100	15678	19029	21480	**13%**
Camel Valley Vineyards			16000	12000	15000	**25%**
Bude Stratton Museum	8750	6878	5255	7744	5144	**-34%**
Bodmin & Wenford Railway	44000	45794	44167	47707	47284	**-1%**
Arthurian Centre		20540	20710	21000	22000	**5%**
Antony Woodland Garden	5037	7228	9000	4987	4451	**-11%**
Antony House	17965	19460	20819	20206	17027	**-16%**

Source: South West Tourism

- **The Sport Economy**

The analysis in this section relates to official data in employment collected in the Annual Business Inquiry (ABI). Following the guidelines of the DCMS Evidence Toolkit, the SIC codes are relevant for sport.

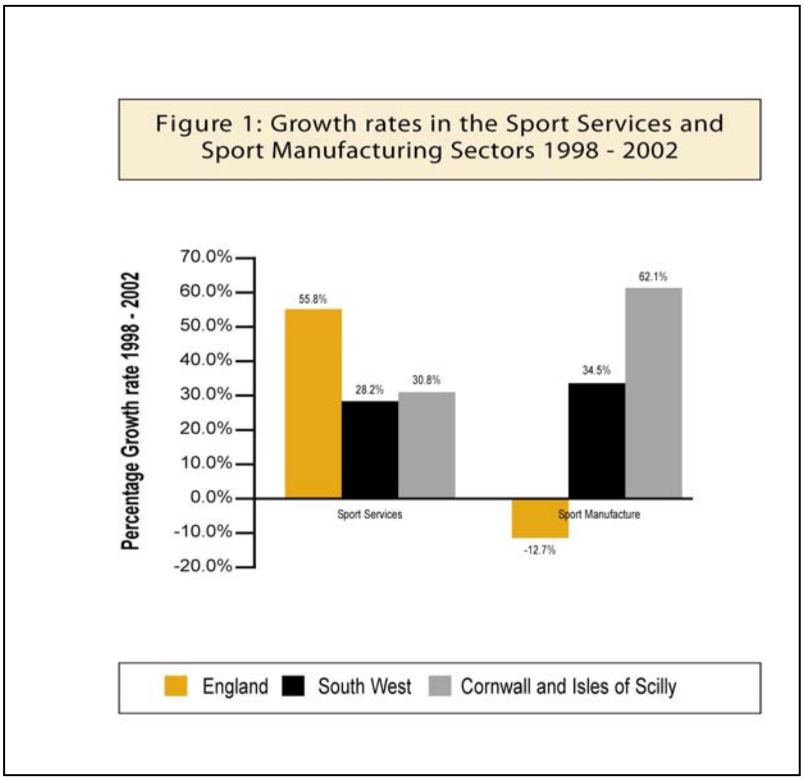


Figure 1: Growth rates in the Sport Services and Sport Manufacturing Sectors 1998 - 2002

Source: The Sport Economy in Cornwall and the Isles of Scilly, Sport Industry Research Centre

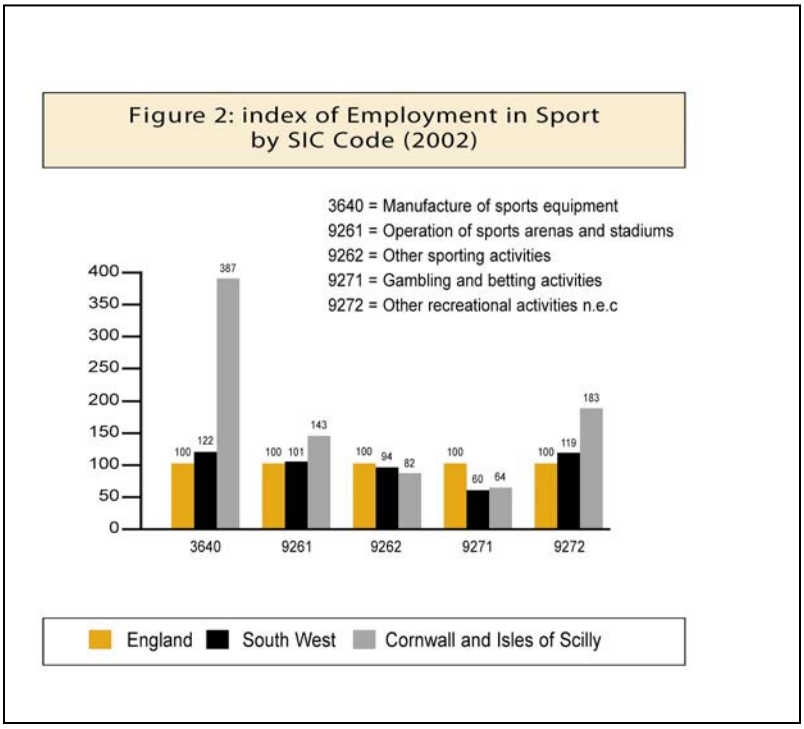


Figure 2: index of Employment in Sport by SIC Code (2002)

SIC Code 3640 – Manufacture of Sports Equipment
SIC Code 9261 – Operation of Sports Arenas and Stadiums
SIC Code 9262 – Other Sporting Activities
SIC Code 9271 – Gambling and Betting Activities
SIC Code 9272 – Other Recreational Activities

Source: The Sport Economy in Cornwall and the Isles of Scilly, Sport Industry Research Centre

Overall primary research identifies sport-related businesses in Cornwall and the Isles of Scilly with a total estimated turnover of £205 million and with an estimated 2,600 full-time jobs and 1,600 part-time jobs for the ten pilot sports. The table below breaks this figure down by these sports. It shows surfing to be the most important sport in economic terms. Sailing has the second highest turnover generated but golf has the second highest employment. Both turnover and employment for sport as a whole are considerably higher since these figures relate to just ten sports. Also the figures take no account of economic activity generated in the accommodation and food and drink sectors from sports tourists taking part in these activities, which could easily double the level of economic activity associated with sport in the Cornwall and the Isles of Scilly.

EMPLOYMENT AND TURNOVER IN SPORTS RELATED BUSINESSES
Cornwall and the Isles of Scilly

Sport	**Full-time employment**	**Part-time employment**	**Turnover**
Cycling	100	60	£5,000,000
Diving	200	200	£17,500,000
Fishing	154	31	£7,000,000
Golf	418	190	£32,000,000
Horse Riding	158	170	£6,000,000
Pilot Gig Racing			
Sailing	322	92	£52,000,000
Surfing	1036	571	£64,000,000
Other Water sports	240	240	£19,000,000
Total	**2628**	**1554**	**£205,000,000**

Source: The Sport Economy in Cornwall and the Isles of Scilly, Sport Industry Research Centre

EMPLOYMENT IN SPORTS RELATED INDUSTRIES	
SECTOR	**EMPLOYMENT ('000s)**
COMMERCIAL SPORT	
Spectator Clubs	0.34
Participating Clubs	0.22
Retailers	0.71
Manufacturing (exports)	0.09
TV and Radio	0.07
Subtotal	**1.09**
Voluntary sport	0.60
Commercial non-sport	1.78
CENTRAL GOVERNMENT	
Administration	0.01
LOCAL GOVERNMENT	
Sports facilities	0.13
Education	0.24
Transport/police	0.02
Subtotal	**0.39**
TOTAL	**4.14**

Source: The Sport Economy in Cornwall and the Isles of Scilly, Sport Industry Research Centre

The table above indicates the total number of people employed in the sports industry in the Cornwall and Scilly Isles region is 4,140 (Full-time Equivalents). It is important to emphasise that this is not a figure derived from a detailed survey of the area. It is based on the estimation of Value Added (see below), the total wage bill, and the average amount of earnings.

The largest part, 41% of sport related employment, comes from the commercial Non-sport sector.

The Commercial Sport sector is the second largest employer, reflecting the strength of the sport-retailing sector in the area, especially in the outdoor activities. It accounts for 35% of sports related employment. Overall sport related employment represents 1.9% of total employment in the region which is considerably greater than the UK average.

Commercial Sport Sector

The Commercial sport sector includes:

1. Retailing sector focusing on sales and distribution of sports clothes, footwear, equipment and publications.

2. Private organisations deriving their income directly from spectator sports events. An example is football clubs.

3. Private organisations deriving their profit through sports participation events. An example is private health and fitness centres.

COMMERCIAL SPORT INCOMES	
	£ million
Spectator Clubs	
Admissions	5.99
Sponsorship and advertising	1.54
Corporate entertainment	1.47
Horserace Betting Levy	0.57
Participation Clubs	
Subscription and Fees	8.50
Retailers (net of VAT)	
Equipment	14.67
Clothing and footwear	17.53
Exports and Manufacturers	
Clothing, footwear and equipment	7.19
TV and Radio	
BBC	1.79
Commercial	1.68
Exports	0.19
Internet subscriptions	0.03
Total Income	**67.33**

Source: The Sport Economy in Cornwall and the Isles of Scilly, Sport Industry Research Centre

Voluntary Sector

The voluntary sector includes clubs on a non profit basis and those organisations which redirect all profits back into their operations. However, when admission fees are charged in major spectator events, they are treated as commercial sport even if they are organised by non-profit organisations.

From Table 6, total sports related voluntary sector income is £28.42. This does not take into account bar receipts. The most important category of income relates to participation. Player's subscriptions and match account for £21.04 million which is 74% of total income.

VOLUNTARY SECTOR INCOME	
	£ million
Factor Income (monetary)	
Players' subscriptions and match fees	21.04
Equipment	0.09
Sponsorship and advertising	1.05
Raffles and gaming machines	1.30
Bar receipts	23.48
Subtotal (factor income)	*46.96*
Other Monetary Income	
Grants	0.53
Foundation for Sport and Arts	3.23
Employers' subsidies	0.73
Interest	0.37
Lottery awards via Sports Council	0.06
Lottery Partnerships	0.02
Total Monetary Income	
(excluding bar receipts)	**28.42**

Source: The Sport Economy in Cornwall and the Isles of Scilly, Sport Industry Research Centre

Commercial Non-Sport Sector

The Commercial Non-Sport sector is only relevant to the sports industry as far as it provides inputs both current and capital to the sports sectors. From the point of view of demand it may attract sport related spending on travelling, gambling skiing and education.

Table 8 below summarises Commercial Non-Sport income. Its value in the Cornwall Region and the Scilly Isles is £63.52 million. Its most important element is sales of current inputs to the Commercial Sports sector at £26.4 million.

COMMERCIAL NON-SPORT INCOME	
	£ million
Receipts net of tax from consumer spending	
Travel	1.74
Gambling	9.48
Skiing	1.35
Public Schools	0.66
TV Rental, cable and satellite subscriptions	8.48
Sales of Current inputs to:	
Central Government	0.22
Local Government	1.28
Commercial Sport	26.39
Voluntary Sector	5.56
Interest from voluntary sector	0.27
Sales of capital inputs to:	
Local Government	2.87
Commercial Sport	2.50
Voluntary	2.72
Promotion Expenditure for Sponsorship (intra-sectoral flow)	3.62
Total Income	**63.52**

Source: The Sport Economy in Cornwall and the Isles of Scilly, Sport Industry Research Centre

- **Environment & Renewable Energy (Additional info. on environmental tech to follow)**

Current Renewable Electricity Generating Capacity in Cornwall (January 2004)				
Technology	**Location**	**Number of machines peak output**	**Installed capacity MW**	**Annual homes equivalent[1]**
On-shore wind	Delabole	10 x 400kW	4	2628
	Carland Cross	15 x 400kW	6	3942
	Goonhilly Downs	14 x 400kW	5.6	3679
	Cold Northcott	21 x 300kW & 1 x 500kW	6.8	4468
	St Breock	11 x 450kW	4.95	3252
	Four Burrows	15 x 300kW	4.5	2957
	Bears Down	16 x 600kW	9.6	6307
		Total on-shore Wind	**41.45**	**27,233**
Landfill Gas	United Mines		4.8	
	Connon Bridge		1.95	
		Total Landfill Gas	**6.75**	**12,656**
Hydro	Coverack Bridges		0.18	
Small & micro	St Blazey		0.20	
	Kennal Vale		0.24	
	De Lank Quarry		0.30	
	Various micro		0.11	
	Trecarrell		0.03	
		Total Hydro	**1.06**	**171**
TOTAL ALL TECHNOLOGIES			**49.3**	**40,060**

Source: Cornwall Sustainable Energy Partnership

Note this is a rough indicator of the amount of electricity that can be delivered by the various technologies
Estimated number of homes that could be supplied with electricity assuming an annual average electricity consumption of 4000 kWh. Account has been taken of the variation in capacity factors for different technologies including the variability of the wind and river flows. For wind the calculation is as follows:
Installed Capacity X capacity factor (30%) X hours in the year (8760) X 1000 (to convert to kWh) ÷ 4000kWh = number of households (CAG Consultants 2004) .

Natural Gas

Cornwall has only limited access to mains gas and so is untypical of the UK where gas is the heating fuel in most UK homes and businesses. There has been a significant increase in the number of homes and businesses with a gas supply over recent years. In most instances it is the cheapest heating fuel.

Gas sales and numbers of customers in Cornwall and districts, 2001 Source: DTI - Energy Trends June 2003							
	Domestic consumers (1)		**Commercial and industrial consumers**		**All consumers**		
District	Sales 2001 – GWh	Number of consumers (thousands)	Sales 2001 – GWh	Number of consumers (thousands)	Sales 2001 - GWh	Number of consumers (thousands)	
Caradon	315	19.08	127	0.35	441	19.42	16,499
Carrick	327	19.74	297	0.60	624	20.33	16,564
Kerrier	351	22.91	202	0.62	554	23.53	15,339
N Cornwall	209	12.10	242	0.36	451	12.46	17,304
Penwith	182	11.95	61	0.30	243	12.25	15,262
Restormel	184	10.99	598	0.27	782	11.26	16,758
Totals	**1,568**	**97**	**1,527**	**2.5**	**3,095**	**99**	

Source: Cornwall Sustainable Energy Partnership

(1) Customers with an annual consumption of 73,200 kWh or lower, which will include some small industrial and commercial consumers

Domestic Energy Use

In 2002, 55% of Cornish homes did not have a mains gas supply. Where gas is not available this results in higher than average heating costs for residents and is a major contributor to the high levels of fuel poverty in the county. It also results in wider use of other heating fuels such as electricity, oil, and solid fuel, that result in higher carbon emissions than natural gas.

Homes without gas in Cornwall 2002			
	Domestic consumers of gas (thousands)	**Total homes (thousands)**	**% without gas**
Caradon	19.1	33.8	43.6
Carrick	19.7	38.6	48.9
Kerrier	22.9	39.5	42.0
North Cornwall	12.1	34.4	64.8
Penwith	11.9	28.1	57.4
Restormel	11.0	40.5	72.9
Cornwall	**96.7**	**214.9**	**55.0**

Derived from Energy Trends June 2003 and 2001 Census

18% of Cornish homes do not have central heating. The six districts of Cornwall are all in the top ten local authorities in the South West of England for households without central heating. This is an indicator of low energy efficiency in these homes and is another contributor to fuel poverty in the county.

Table 5: Households without central heating in Cornwall 2001				
	Total Households	Without CH	% Without CH	Ranking in region
Caradon	33,829	5,871	17	6
Carrick	38,598	6,818	18	5
Kerrier	39,478	6,823	17	7
N Cornwall	34,353	5,304	15	10
Penwith	28,080	6,937	25	2
Restormel	40,476	7,443	18	4
Cornwall	**214,814**	**39,196**	**18**	

Source: 2001 Census

Based on the 1991 Census and the 1996 English House Condition Survey, this work has shown that 24.4% of households are at risk of fuel poverty in Cornwall.

Table 6: Cornish households at risk of fuel poverty (Based on 1991 Census and EHCS 1996)			
	Number of households	Number of households at risk	% of households at risk
Caradon	30,175	6,602	21.9
Carrick	33,938	8,342	24.6
Kerrier	34,707	8,618	24.8
N Cornwall	29,191	6,485	22.2
Penwith	24,436	7,099	29.1
Restormel	33,896	8,343	24.6
Cornwall	**186,343**	**45,489**	**24.4**

Derived from data from CSE/Bristol University 2003
Note the households data in Table 6 are based upon 1991 census data whereas Table 5 is based upon the 2001 census data.

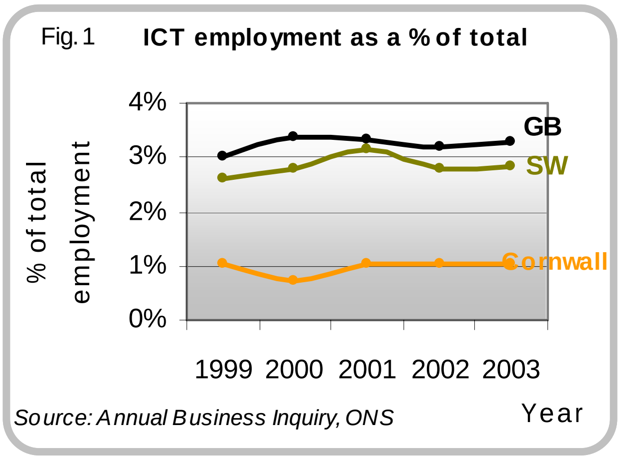
Table 9: Scenario for Future Renewable Electricity Capacity (MW) in Cornwall by 2010				
Technologies covered by REvision 2010 assessment	Accessible Resource[1]	REvision 2010 Scenario[2]	Current capacity	Capacity required to meet 2010 target[2]
Shoreline wave	2	1	0	1
Offshore wave[3]	0	0	0	See note 3
Tidal barrage	28	0	0	0
Tidal stream[3]	0	0	0	See note 3
Small-scale hydro	3	3	1.06	2.658
Solar PV	0.2	0.2	Not known	0.2
Energy Crops / Forestry Residues	15	10	0	10
Straw	0	0	0	0
Anaerobic Digestion	2	2	0	2
Poultry Litter	1	0	0	0
Landfill Gas	4	4	6.75	0
Energy from Waste	23	7	0	7
Onshore wind	188-500	66-81	41.45	24.55
Offshore wind[3]	0	0	0	see note 3
Total	**266-578**	**93-108**	**49.26**	**44.46[4]**

Source: Cornwall Sustainable Energy Partnership

1. This is the accessible resource in Cornwall according to the assessments carried out by the REvision 2010 project and further local knowledge. For wind and the overall total, the figures include the range of accessible economic resource after and before the landscape sensitivity assessment.
2. This is just one possible scenario for the mix of technologies and the mix will vary according to actual projects coming forward.
3. The provisional target put forward for Cornwall under the REvision 2010 process does not include offshore technologies but they are included in the overall SW regional target. It is suggested that 5 MW of offshore wave and 50 MW of offshore wind could contribute to the SW regional target of 563-673 MW by 2010. An early granting of a Strategic Environmental Assessment (SEA) may allow commercial development of offshore energy programmes to be developed before 2010.
4. This figure takes into account the landfill gas current capacity that is already greater than the Revision 2010 scenario.

- **Information and Communication Technology**

Employment



Source: LINC Cornwall Sector Profile

Between 1999 and 2003 employment in the ICT sector in Cornwall increased by 23.6%, compared to 16.2% and 12.4% in the SW and GB respectively.

Growth in part time jobs has been much more significant than growth in full time jobs. Despite the significant growth rate in Cornwall, figure 1shows that the ICT sector makes up only 1.1% of employment, compared to 2.8% and 3.3% in the SW and GB respectively.

However, it should be noted that the latest data is for 2003 and developments with broadband in the County may not yet be fully reflected in the figures.

The employment figures in this profile refer to the number of jobs in the ICT. Figure 1 uses the total figure, thus incorporating both part and full time work.

ICT sector

	Part time	Full time	Total
1999	319	1,224	1,544
2000	194	953	1,148
2001	250	1,503	1,752
2002	500	1,382	1,883
2003	466	1,445	1,908
% change	46.1%	18.1%	23.6%

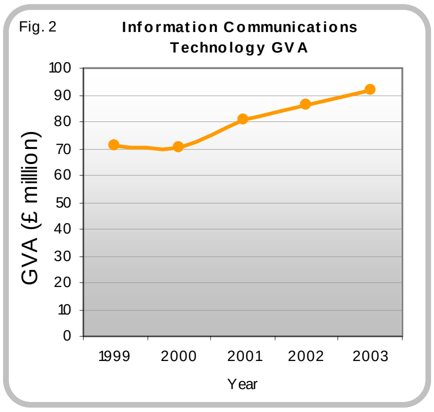
Source: Annual Business Inquiry ONS © Crown Copyright

ICT employment as a % of total

	Cornwall	SW	GB
1999	1.0%	2.6%	3.0%
2000	0.7%	2.8%	3.4%
2001	1.0%	3.2%	3.3%
2002	1.1%	2.8%	3.2%
2003	1.1%	2.8%	3.3%

Source: Annual Business Inquiry ONS © Crown Copyright

GROSS VALUE ADDED



Source: LINC Cornwall Sector Profile

The ICT sector in Cornwall makes up about 1.5% of the total economy.

Figure 2 shows that despite the ICT sector not showing any significant growth as a percentage of the total economy (not up until the latest data for 2003), in absolute terms the sector has been growing by 6.5% per annum.

Telecommunications makes up 64% of the ICT sector in Cornwall, compared to 44% nationally. However, its growth is only 3.8% p.a. (per annum), well below the Cornwall growth of 10.7%p.a. Conversely, the computer services sub-sector in Cornwall is growing much more rapidly – 12.4% p.a., compared to 10.4% p.a. nationally.

Productivity in the ICT sector is good as it makes up 1.1% of the jobs in Cornwall, but generates 1.5% of the GVA.

Hotels & catering GVA data has been sourced from the Local GVA model for Cornwall level data and the Office for National Statistics (ONS) for UK statistics. The following tables provide the raw data from which the graphs on page one were produced.

ICT GVA (£ million)

	Cornwall	UK
1999	71.2	36,182
2000	70.6	41,013
2001	80.7	43,662
2002	86.2	46,732
2003	91.6	51,171
Growth rate (% per annum)	6.5%	9.1%

Source: Local GVA model © Nankivell 2005 & ONS © Crown Copyright

ICT GVA (% of total)

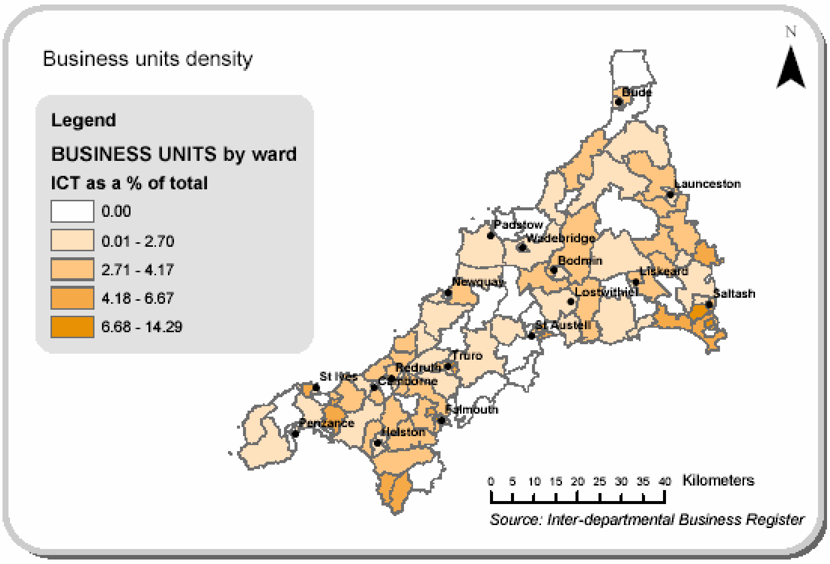
	Cornwall	UK
1999	1.8%	4.5%
2000	1.6%	4.9%
2001	1.6%	4.9%
2002	1.6%	5.0%
2003	1.5%	5.2%

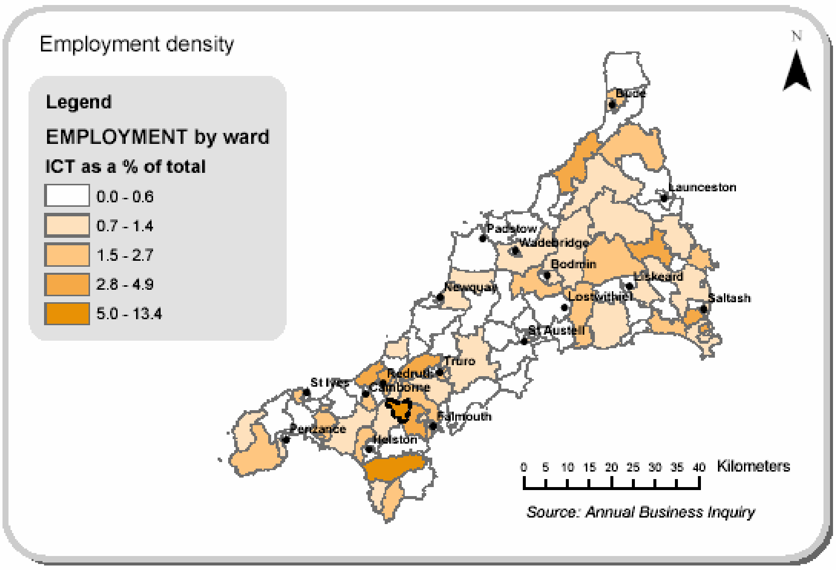
Spatial Distribution

The 2 figures below (3 and 4) map the employment and business unit (i.e. premises) density for ICT (Nb. The scales are different for each map).

Figure 3 shows that there is quite a high density of employment in ICT around the Camborne and Redruth area.

In particular, Stithians ward (highlighted with a dashed outline) has the highest density of employment in the sector at over 10%.
Figure 4 shows that there is a fairly even spread of ICT business units across the county.





Source: LINC Cornwall Sector Profile

Caveats in reference to source information from LINC:

The size of the sector in the profiles may differ to other research as each sector is made up by aggregating a number of other “sub-sectors”. These sub-sectors have been defined by the customer, Cornwall Enterprise. Other studies may use a broader or narrower definition. In this profile a fairly narrow definition had to be maintained to ensure that there was no overlap with other sectors for which profiles have been produced.

This profile only analyses the *economic* value of a sector. The social, cultural and environmental value of a sector should also be thoroughly considered.

Sector definitions used in this profile may vary slightly between GVA and employment as the GVA data does not have such a detailed sector breakdown. This is because calculating GVA on a local level relies upon numerous data sources, some of which are only available at a broad sector level. For this reason, it has not been possible to include GVA data for some of the more specific or cross-cutting sectors without further extensive research. In addition, the national accounting system’s classification limits the way in which we can understand the economy, for example, for the marine profile surf shops and wetsuit manufacturing cannot be drawn from the current structure, they are included in retail and rubber manufacturing, respectively. Again, further extensive research would be required to penetrate this detail.

All data in this profile refers to workplace.

Business units in reference to source information from LINC:

Business units, in this publication, refer to business premises and/or head offices. This is the most comprehensive measure of activity as it incorporates counts of individual branches or sites – this is more useful than mapping the enterprise or business alone as this would only provide a count of the location of each head office.

The source of the business units data is the Inter-Departmental Business Register. This register is produced by the Office for National Statistics using VAT (value added tax) and PAYE (pay as you earn) records, therefore, it captures all businesses that either trade over the VAT threshold – currently a turnover of 56,000, and/or are PAYE register – employ at least one member of staff who earns more than £91/week, or £395/month.

- **Creative Industries (information to follow)**

- **Marine Sector (information to follow)**

THEMES

- **Housing**

Details of house price to gross household income ratios, by local authority, county and region and of the data sources and the methodology applied in the construction of the 2003 house price to income ratios are available in the appendices below.

Affordability Differences by Area for Working Households Buying their Homes – 2003 Update

LOCAL AUTHORITY	Numbers of working households	Household earned income	Mean house prices	House price to Income ratio
South West	482,554	£32,444	£151,147	4.66
AVON				
Bath & NE Somerset UA	17,401	£36,158	£184,631	5.11
Bristol UA	47,568	£31,314	£143,958	4.60
North Somerset	20,613	£36,034	£156,093	4.33
South Gloucestershire UA	26,272	£35,221	£146,831	4.17
CORNWALL				
Caradon	5,086	£33,660	£128,683	3.82
Carrick	8,093	£29,159	£164,983	5.66
Kerrier	6,202	£26,111	£148,362	5.68
North Cornwall	5,487	£25,161	£164,529	6.54
Penwith	5,661	£28,769	£163,040	5.67
Restormel	9,083	£27,318	£144,474	5.29
DEVON				
East Devon	8,824	£30,013	£180,675	6.02
Exeter	13,701	£29,491	£150,096	5.09
Mid Devon	5,193	£34,278	£151,871	4.43
North Devon	6,877	£27,356	£148,390	5.42
Plymouth UA	30,002	£29,638	£110,010	3.71
South Hams	5,963	£32,239	£173,529	5.38
Teignbridge	9,262	£29,847	£151,787	5.09
Torbay UA	12,517	£25,140	£145,954	5.81
Torridge	4,782	£24,142	£157,209	6.51
West Devon	3,221	£30,903	£167,697	5.43
DORSET				
Bournmouth UA	21,218	£29,298	£166,733	5.69
Christchurch	1,983	£28,298	£191,945	6.71

East Dorset	5,536	£37,978	£203,191	5.35
North Dorset	5,573	£32,668	£162,371	4.97
Pool UA	12,360	£34,786	£179,949	5.17
Purbeck	2,739	£30,134	£174,662	5.86
West Dorset	6,011	£32,645	£167,901	5.14
Weymouth & Portland	5,560	£29,449	£153,635	5.22
GLOUCESTERSHIRE				
Cheltenham	12,932	£35,948	£159,563	4.44
Cotswold	8,761	£38,586	£185,144	4.80
Forest of Dean	8,572	£29,469	£136,183	4.62
Gloucester	12,309	£31,855	£118,652	3.72
Stroud	10,745	£36,055	£150,240	4.17
Tewkesbury	6,200	£35,744	£149,602	4.19
SOMERSET				
Mendip	9,743	£32,209	£144,073	4.47
Sedgemoor	8,362	£30,992	£135,212	4.36
South Somerset	13,262	£32,942	£134,412	4.08
Taunton Deane	10,839	£29,113	£144,747	4.97
West Somerset	1,802	£24,165	£164,245	6.80
WILTSHIRE				
Kennet	8,109	£39,061	£153,088	3.92
North Wiltshire	12,824	£41,232	£168,946	4.10
Salisbury	11,763	£32,574	£168,680	5.18
Swindon UA	22,100	£38,599	£131,436	3.41
West Wiltshire	11,442	£33,036	£138,036	4.18

Source: Joseph Rowntree Foundation

Table 20: Quarterly House Prices[1]

	2003	2004				2005	Q1 vs. Q4 (%)	Annual change (%)
	Q4	Q1	Q2	Q3	Q4	Q1 (prov)		
ENGLAND	166,784	169,108	178,521	190,936	186,261	186,655	0.2	10.4
SOUTH WEST	175,889	179,151	187,525	201,301	199,368	197,061	-1.2	10.0
Cornwall & Isles of Scilly	174,832	177,559	187,716	202,014	206,277	205,173	-0.5	15.6
Caradon	155,514	150,012	164,865	185,319	179,518	196,583	9.5	31.0
Carrick	197,244	211,005	221,402	229,663	226,529	235,757	4.1	11.7
Kerrier	163,623	162,083	168,821	191,838	192,494	184,416	-4.2	13.8
North Cornwall	189,199	186,823	199,515	216,672	234,722	213,668	-9.0	14.4
Penwith	183,337	194,458	197,277	205,704	216,005	219,027	1.4	12.6
Restormel	163,419	165,118	178,794	186,221	191,150	188,353	-1.5	14.1
Isles of Scilly	275,417	291,025	..	245,417	302,500	..	..	..

[1]Based on Land Registry Data. Excluded from the above figures are sales at less than market price (eg Right To Buy) and all sales below £1,000 and sales above £20m. 2004. Q3 figures are provisional.
Source: ODPM - SW Regional Development Agency Sub-regional indicators July 2005

SUMMARY INDICATORS FOR HOUSING		
AREA	**Average House Price 2005 Q1 (£)[1,2]**	**Average Council Tax (Band D) April 2005 (£)[1]**
South West	197,061	1,237
Bath & NE Somerset	238,777	1,195
Bournemouth	193,413	1,240
Bristol	179,116	1,296
N. Somerset	182,084	1,216
Plymouth	149,683	1,176
Poole	250,926	1.189
S. Gloucestershire	176,678	1,239
Swindon	156,100	1,170
Torbay	169,106	1,212
Cornwall & Isles of Scilly	205,173	1,183
Devon	209,201	1,262
Dorset	225,200	1,314
Gloucestershire	200,056	1,251
Somerset	187,765	1,222
Wiltshire	207,108	1,230

Source: SW Regional Development Agency - Sub-regional Indicators July 2005

[1]*SourceODPM*

[2]*Excluced form the above figures are sales at less than market price (eg Right to Buy) and sales below £1,000 and sales above £20m. Figures are provisional*

- **Sites and Premises**

Economic Forecast to 2026
- 14% Net Employment Growth
- 91,000 additional jobs
  Non-market service (Truro & Falmouth)
  Market services (St Ives)
  Distribution and Hotels (Falmouth, Helston, Newquay & St Ives)

Economic Forecast to 2026
- Over 33,000 job losses in four sectors
  Agriculture and Fishing (most rural areas)
  Mining and Quarrying (St Austell)
  Manufacturing (Bodmin, Launceston, Falmouth)
  Utilities – Energy, Water (CPR and Bodmin)

Economic Forecast to 2026
- Other sectors expected to expand:
  Knowledge Economy
  Creative Industries
  Health & Education Research
  Tourism

Housing & Employment Space in the 7 Urban Centres		
Area	**Housing**	**Employment Space**
Bodmin		15ha
St Austell	2,030	19ha
Newquay	2,100	15ha
Truro	3,420	11ha
Camborne, Poole, Redruth	3,490	60 ha
Falmouth	1,680	13ha
Penzance		St Erth 9ha

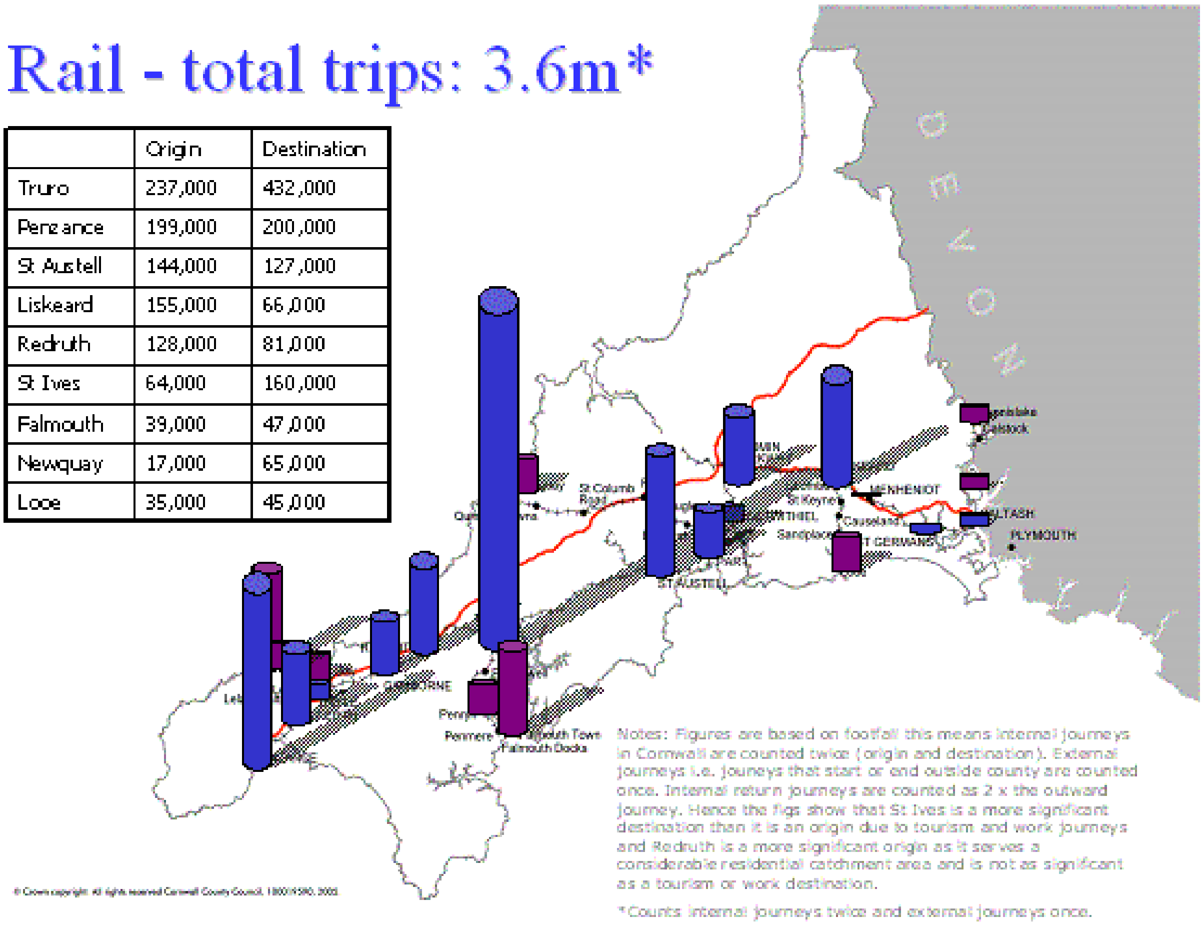
Source: Cornwall Structure Plan 2004 (housing allocations for the period 2001-2016)

- **Transport and Energy (more info on transport to follow)**

RAIL

Notes: Figures are based on footfall this means internal journeys in Cornwall are counted twice (origin and destination). External journeys i.e. jouneys that start or end outside county are counted once. Internal return journeys are counted as 2 x the outward journey. Hence the figs show that St Ives is a more significant destination than it is an origin due to tourism and work journeys and Redruth is a more significant origin as it serves a considerable residential catchment area and is not as significant as a tourism or work destination.

*Counts internal journeys twice and external journeys once.



	Origin	Destination
Truro	237,000	432,000
Penzance	199,000	200,000
St Austell	144,000	127,000
Liskeard	155,000	66,000
Redruth	128,000	81,000
St Ives	64,000	160,000
Falmouth	39,000	47,000
Newquay	17,000	65,000
Looe	35,000	45,000

NEWQUAY AIRPORT

Based on the passenger figures for September 2005 the revised forecasts for passenger movements are now between 370,000 – 375,000 for 2005. The current construction works will take the capacity up to 400,000 comfortably but will provide a maximum capacity of 500,000 with good management. These passenger movement figures are considerably in advance of the forecasts and data reproduced in the Roger Tym and partners report to CCC Restormel Borough Council and the RDA dated January 2004 entitled the economic impact of Newquay Airport - extracts of which are included below.

Additional economic impact work is currently underway in respect of the airport and will be added to this document as and when it is appropriate to make the information available

NEWQUAY AIRPORT PASSENGER FORECASTS (thousand passengers) Table 3.1

	2002-2003	2015	2030
SWRAS projections (RRC)	185	200	400
unconfirmed White Paper projections (BASE)	185	700	1000
unconfirmed White Paper projections (UPSIDE)	185	1000	1500
unconfirmed White Paper projections (PLH CLOSED*)	185	1200	1750
Avia Option 1: fully developed existing airports	185	533	1012
Avia Option 2: PLH closed; NQY and EXE open	185	578	1112
Avia Option 3: new South Hams airport. PLHand EXE close. NQY remains	185	551	1042

Source: The Economic Impact of Newquay Airport – Roger Tym & Partners

The South West Regional Air Services Study (SWRAS) was undertaken by the Department for Transport and completed in July 2002. It projects 200,000 passengers per annum in 2015 and 400,000 in 2030. The flights in and out of airports in the south west are dependent on a number of factors, and the projections put forward a number of different scenarios to take account of this issue. Scenarios put forward include “South East Constrained”, and “UK Constrained” (scenarios to cover demand management) and a “Facilitating Growth” scenario. The baseline numbers, which we have used in this report, are known as the “RASCO Reference Case”. However, the projections have rapidly become out of date due to the emergence of new services to Newquay from London by airlines with a low-cost business model.

More recent forecasts, which take into account the growth of low-cost airlines, are found in the Avia Solutions report *Development of an Air Transport Strategy for the Far South West of England* (June 2003). Projections are made around three scenarios in this document[9]:

Option 1: (base case): The three existing airports (Exeter, Newquay and Plymouth) are developed within their physical and operational constraints

Option 2: Plymouth is closed, leaving Newquay and Exeter to serve the far South West.

Option 3: A new airport is developed in the South Hams replacing both the existing Plymouth and Exeter airports. Newquay remains operational.

[9] p3 Avia Solutions *Development of an Air Transport Strategy for the Far South West of England* (June 2003)

JOBS GENERATED BY NEWQUAY AIRPORT (Regional) By Forecast Table 5.1			
	2002	2015	2030
Jobs likely White Paper projections (BASE)	84	254	291
Jobs likely White Paper projections (UPSIDE)	84	363	436
Jobs likely White Paper projections (PLH CLOSED)	84	436	509
Jobs Avia Option 1 (fully developed existing airports)	84	194	294
Jobs Avia Option 2 (PLH closed; NQY and EXE open)	84	210	323
Jobs Avia Option 3 (new South Hams. PLH and EXE close. NQY remains)	84	200	303

Source: Avia Solutions; Department for Transport 2003 (unpublished preliminary forecasts), RTP estimates - The Economic Impact of Newquay Airport – Roger Tym & Partners

CONTRIBUTION OF NEWQUAY CONRWALL INTERNATIONAL AIRPORT TO Gross Value Added (GVA) in Cornwall & Isles of Scilly Table 5.2						
		current		2015		2030
	GVA (£, 1998 prices)	**% total Corn & IoS GVA**	**GVA (£, 1998 prices)**	**% total Corn & IoS GVA**	**GVA (£, 1998 prices)**	**% total Corn & IoS GVA**
White Paper projections (BASE)	2,035,385	0.06%	8,493,233	0.17%	14,057,981	0.19%
White Paper projections (UPSIDE)	2,035,385	0.06%	12,133,190	0.24%	21,086,972	0.29%
White Paper projections (PLH CLOSED)	2,035,385	0.06%	14,559,828	0.29%	24,601,467	0.33%
Avia Option 1 (fully developed existing airports0	2,035,385	0.06%	6,466,990	0.13%	14,226,677	0.19%
Avia Option 2 (PLH closed; NQY and EXE open)	2,035,385	0.06%	7,012,984	0.14%	15,632,475	0.21%
Avia Option 3 (new South Hams. PLH and EXE close. NQY remains)	2,035,385	0.06%	6,685,388	0.13%	14,648,417	0.20%

Source: Consultant team estimates; Office for National Statistics; TEMPRO - The Economic Impact of Newquay Airport – Roger Tym & Partners

VOLUME & VALUE OF INBOUND AIR PASSENGERS - Table 5.2					
Passenger Type	**Passenger Numbers**	**Length of Stay in Cornwall**	**Passenger Nights in Cornwall**	**Spend per night in Cornwall**	**Passenger Spend in Cornwall**
Domestic Leisure	22,250	5.1	112,759	£42.86	£4,833,025
Domestic Business	14,211	4.0	56,321	£65.65	£3,697,722
Domestic Other	12,222	2.8	34,432	£35.45	£1,220,548
Overseas Leisure	657	6.2	4,085	£33.79	£138,028
Overseas Business	1,043	6.7	6,975	£97.29	£678,595
Overseas Other	1,325	9.6	12,657	£31.24	£395,405
Total	**51,708**		**227,230**		**£10,963,322**

Source: SERCO estimates 2003, Newquay Airport Visitor Survey 2003, Economic Impact of Tourism in Cornwall 2003
The Economic Impact of Newquay Airport – Roger Tym & Partners

FORECAST VOLUME OF INBOUND AIR PASSENGERS - Table 5.3				
Passenger Type	Base Forecast Passenger Numbers		Uplifted Forecast Passenger Numbers	
	2015	**2030**	**2015**	**2030**
Domestic Leisure & Other	166,600	238,000	238,000	357,000
Domestic Business	53,200	76,000	76,000	114,000
Overseas Leisure & Other	53,331	76,188	76,188	114,281
Overseas Business	13,869	19,813	19,813	29,719
Total	**287,000**	**410,000**	**410,000**	**615,000**

Source: Department for Transport 2003 (unpublished preliminary forecasts)
The Economic Impact of Newquay Airport – Roger Tym & Partners

FORCAST VALUE OF INBOUND AIR PASSENGERS – Table 5.4				
Passenger Type	Base Forecast		Uplifted Forecast	
	2015	**2030**	**2015**	**2030**
Domestic Leisure & Other Nights	793,740	1,133,914	1,133,914	1,700,872
Domestic Business Nights	210,848	301,211	301,211	451,817
Overseas Leisure & Other Nights	396,506	566,438	566,438	849,656
Overseas Business Nights	92,747	132,496	132,496	198,744
Total Nights	1,493,841	2,134,059	2,134,059	3,201,089
Domestic Leisure & Other Spend	£33,551,779	£47,931,112	£47,931,112	£71,896,669
Domestic Business Spend	£13,842,982	£19,775,688	£19,775,688	£29,663,532
Overseas Leisure & Other Spend	£12,924,133	£18,463,047	£18,463,047	£27,694,570
Overseas Business Spend	£9,023,355	£12,890,508	£12,890,508	£19,335,762
Total Spend	**£69,342,249**	**£99,060,355**	**£99,060,355**	**£148,590,533**

Source: Department for Transport 2003 (unpublished preliminary forecasts), Economic Impact of Tourism in Cornwall 2003
The Economic Impact of Newquay Airport – Roger Tym & Partners

EMPLOYMENT SUPPORTED BY INBOUND AIR PASSENGERS – Table 5.5					
		Base forecast		Uplifted forecast	
	2003 Actual	**2015**	**2030**	**2015**	**2030**
Visitor Spend (Current prices)	£10,253,888	£65,255,735	£93,222,479	£93,222,479	£139,833,719
Total direct FTEs supported by tourism	221	1,409	2,013	2,013	3,019
Total direct, indirect and induced FTEs supported by tourism	333	2,117	3,025	3,025	4,537
Additional proportion (i.e. minus deadweight)	40%	40%	40%	40%	40%
Total additional direct FTEs supported by tourism	89	564	805	805	1,208
Total additional direct, indirect and induced FTEs supported by tourism	133	847	1,210	1,210	1,815

Source: RTP estimates based on SERCO, Department for Transport (unpublished preliminary forecasts) and Economic Impact of Tourism in Cornwall data
The Economic Impact of Newquay Airport – Roger Tym & Partners

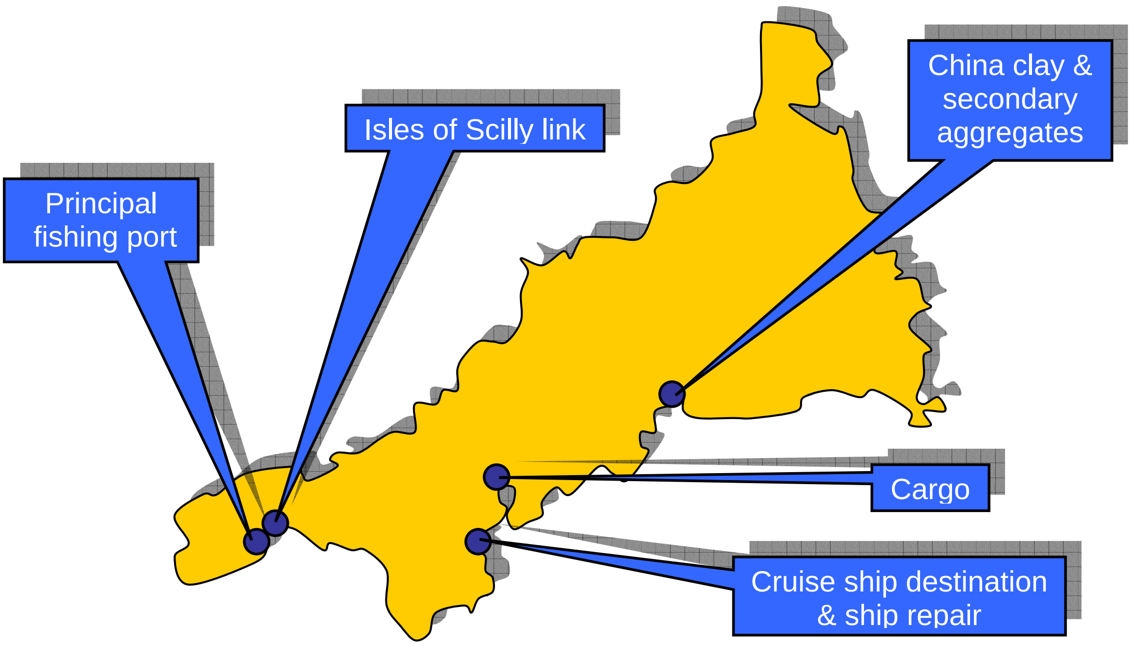
TOTAL JOBS SUPPORTED BY NEWQUAY AIRPORT – Table 5.3					
		Base DfT forecast		Uplifted DfT forecast	
	2003 Actual	**2015**	**2030**	**2015**	**2030**
Additional jobs supported by Airport and activities of Airport (direct, indirect, induced FTEs)	84	254	291	436	509
Additional tourism jobs resulting from Newquay Airport (direct, induced and multiplier FTEs supported)	133	847	1,210	1,210	1,815
TOTAL JOBS SUPPORTED	**217**	**1,101**	**1,511**	**1,646**	**2,324**

Source: RTP estimates based on DfT unpublished, preliminary traffic growth estimates - The Economic Impact of Newquay Airport – Roger Tym & Partners

Summary

- Newquay Airport – 370,000 – 375,000 pax end of 2005 and more new routes
- Serves both business and tourism markets
- Niche Market – not competing with Bristol or Exeter.
- 33% passengers would not have made the journey to Cornwall
- Supports links to Isles of Scilly

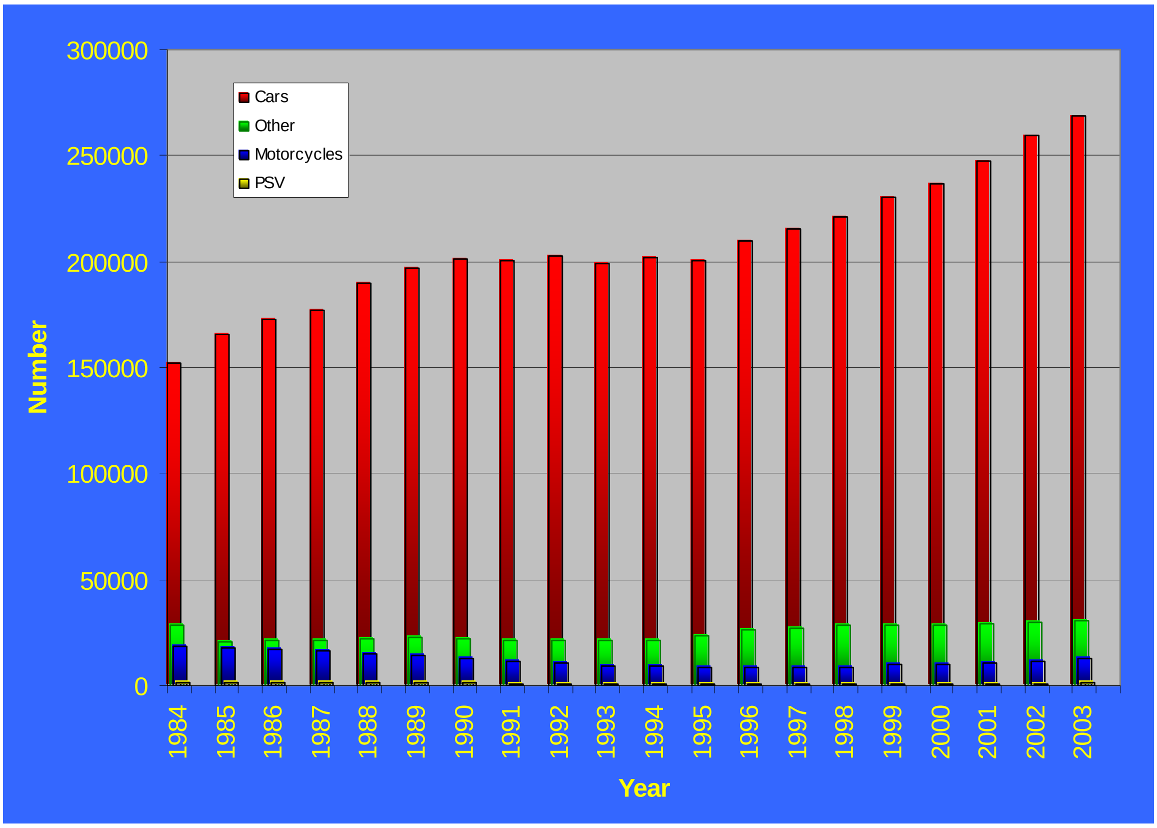
SEA – KEY PORTS



BUS

- Between 2001 – 2005 bus patronage has decreased by 1.5% but mixed picture
- Highest trip purposes are shopping (24%) and work (23%).
- 29% of bus users are of school or college age.
- 60 – 64 age group make 25% more trips than all other age groups.
- Patron gender split 60:40 female to male
- 90% of bus users consider their bus service ‘very important’.
- Bus patronage for 2004 was 8.1m trips.

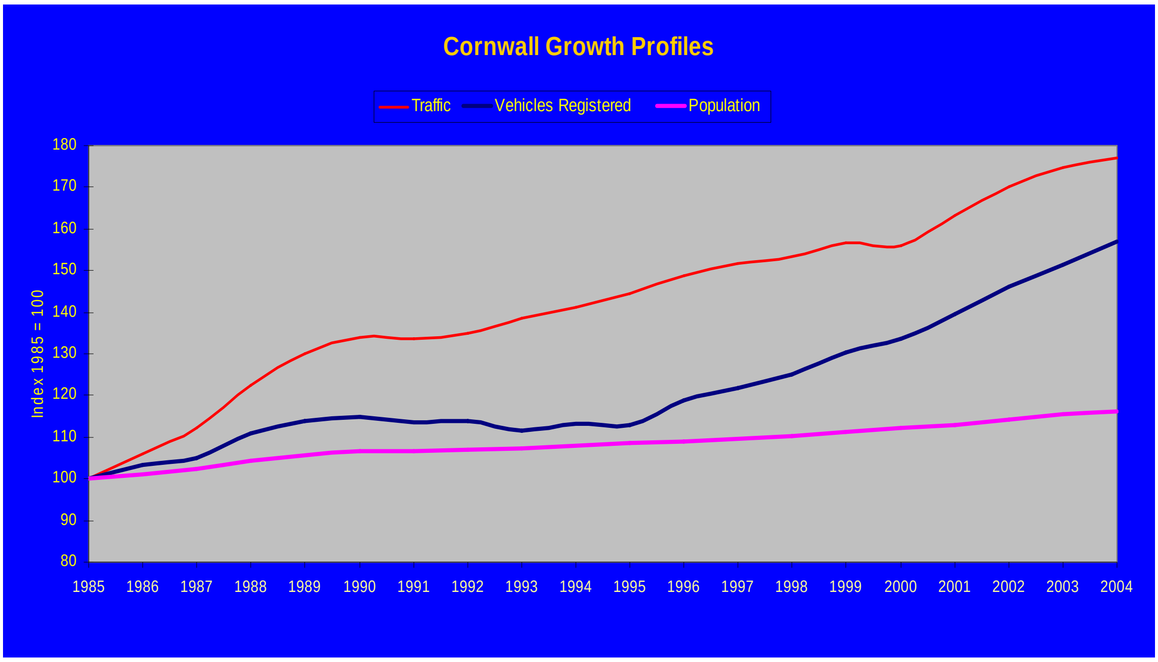
Vehicle Registrations 1984 – 2003



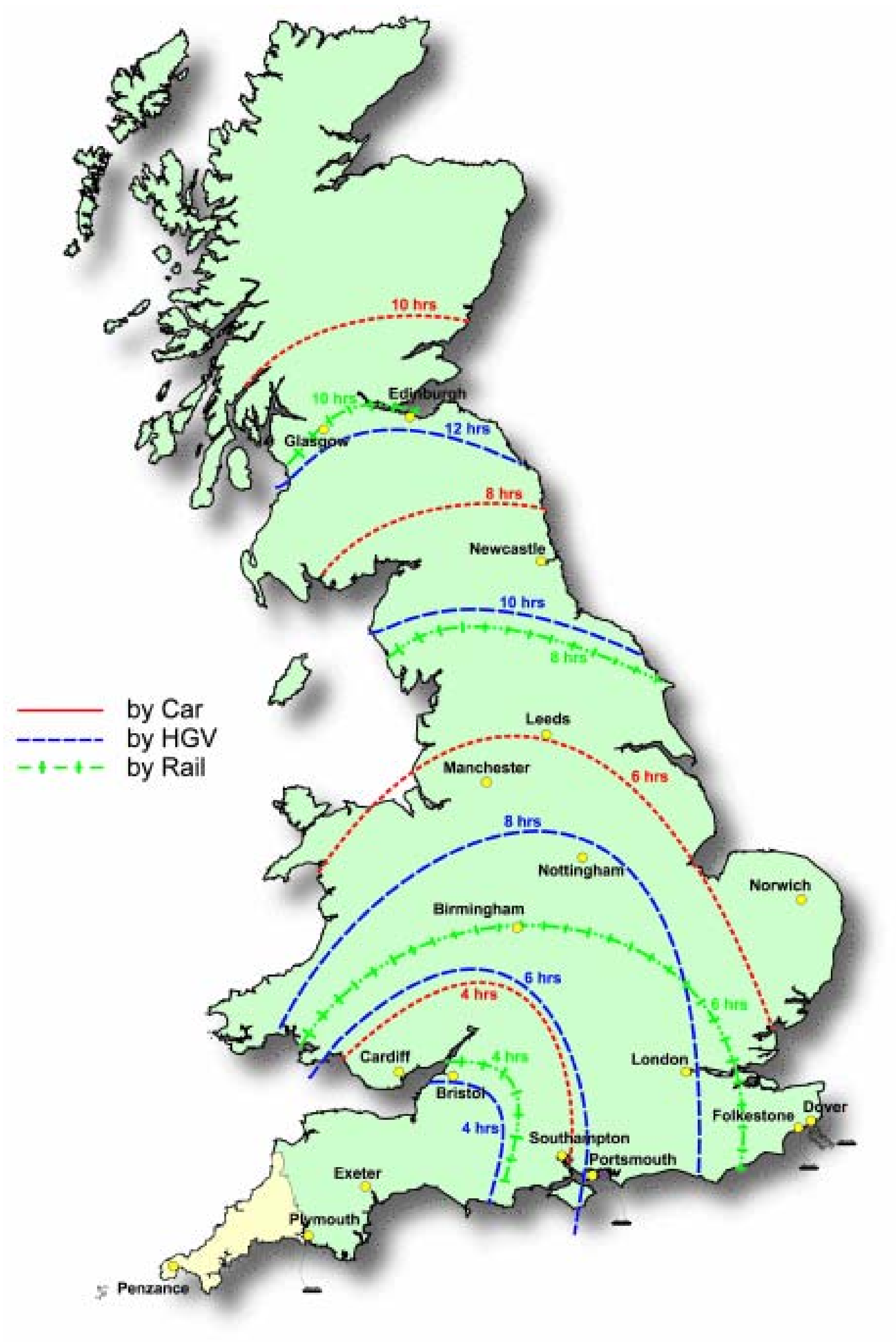
Car Ownership Key Points

- Significant variation in car ownership levels
- Multiple car ownership masking "transport poverty"?
- Impacts on accessibility planning.

Population, Traffic Growth, and Vehicle Registrations 1985 - 2002



OUR REMOTENESS FROM PENZANCE



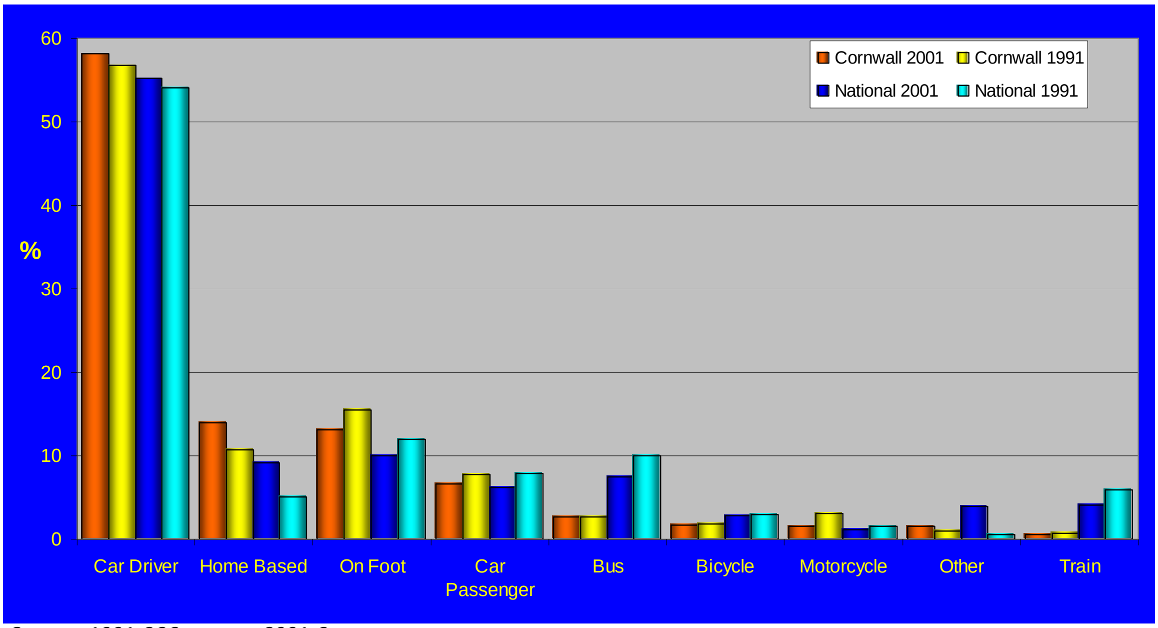
Travel to Work Trips (TTWT) Generated in Cornwall	
Area	**Trips**
N. Cornwall	34,000
Caradon	41,000
Restormel	41,000
Carrick	37,000
Kerrier	38,000
Penwith	25,000
Total TTW Trips	219,000

Source: Census 2001

Average Distance Travelled to Work

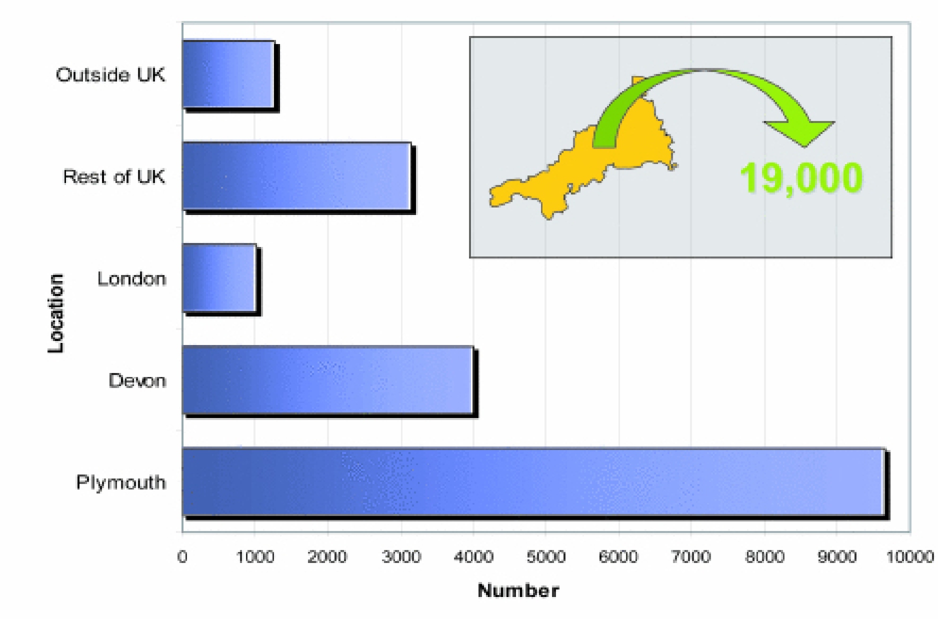
1.	Cornwall	17.23km
2.	Dorset	15.81km
3.	Wiltshire	15.75km
4.	Devon	15.67km
5.	North Somerset	15.64km
6.	Somerset	14.32km
7.	Plymouth	13.83km
8.	Gloucestershire	13.61km
9.	Bath & NE Somerset	13.23km
10.	Torbay	12.42km
11.	Bournemouth	12.21km
12.	S Gloucestershire	12.04km
13.	Poole	11.87km
14.	Swindon	10.54km
15.	Bristol	9.31km

Travel to Work Mode 1991 and 2001

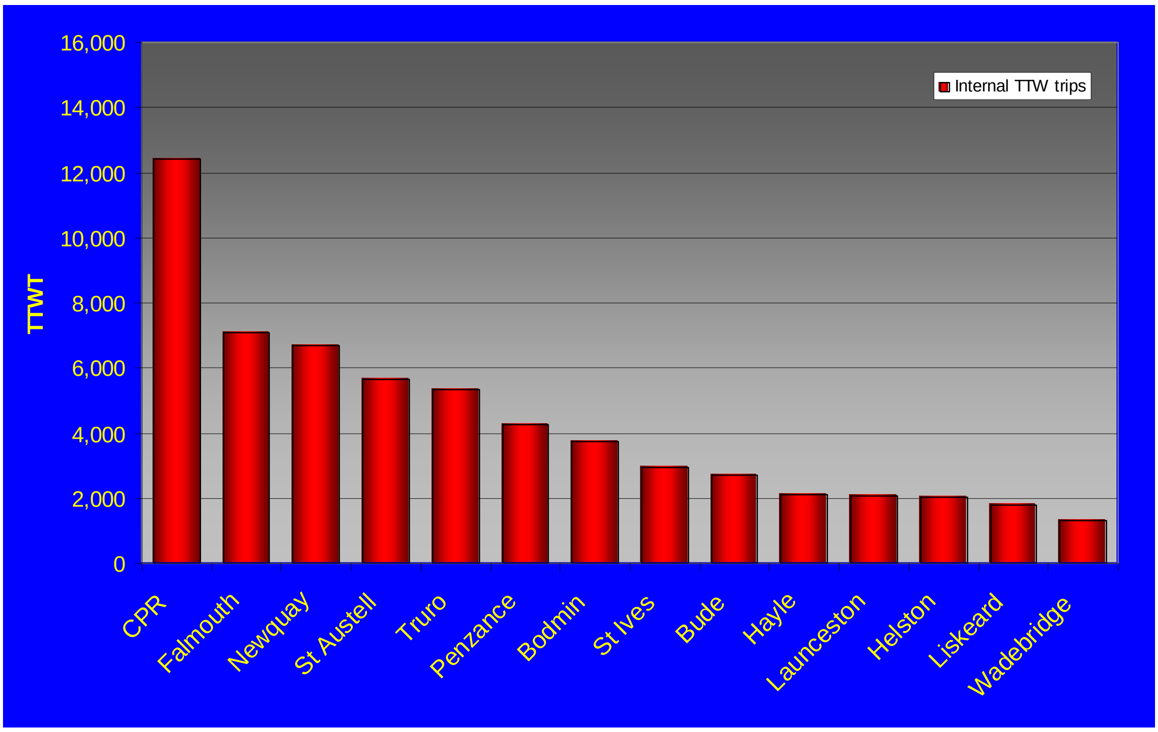


Source: 1991 CCC survey: 2001 Census

TTW Trips Outside of Cornwall



14 Urban Centres – Internal TTW Trips



Source: Census 2001

Travel to Services – Key Points

- Truro has a strong role as a centre for non-food shopping, largely used by residents in the Strategic Urban Centres (SUCs*)
- Residents in Other Main Towns (OMTs**) in the west are equally likely to be pulled to Penzance or Truro and residents in the eastern OMTs are more likely to be pulled towards Plymouth for non-food shopping
- Most residents of all the SUCs regularly do their main-food shopping in their home town, although some also travel to other SUCs, principally Truro.
- In contrast to non-food shopping, Truro and Plymouth are not regularly used by high proportions of residents from the other towns for main food shopping.
- There is high self-containment for convenience shopping and banking.
- Flows for leisure and socialising display both considerable self-containment and mobility
- Flows for leisure display higher levels of mobility between the central and eastern towns whereas flows in the west are more contained.
- Mobility and choice for services is greatest in central Cornwall. These towns display high self-containment, but also travel between the towns for services, particularly Truro.
- Penzance is the dominant service centre for the western peninsula, although come residents are also drawn to Truro for non-food shopping
- In the east patterns vary and there is no single dominant service town within the area. Liskeard shows lower self-containment for service related journeys than the other eastern towns

Key Themes – The future of Travel and Transport in Cornwall

- The Key Priority for the majority of respondents in terms of improving travel and transport in Cornwall is improving public transport
- 95% agreed that improving the rail network was a key priority
- 83% of respondents believe the Council should develop a network of walking and cycling trails and safety is the key issue
- More reliable bus and rail services
- Carrying freight by rail and sea; park and ride and lowering vehicle speeds were felt to be in need of most improvement.
- Enhanced air links at Newquay Airport and improving the main ‘spine’ roads were important priorities
- With regards to getting to services, the majority op people considered improving public transport access to services was most important
- Reduction of HGV movements in villages and town centres

Economy – Key Points

- Large number of small employers means Travel Plans need a targeted approach.
- Significant reliance on road freight to multiple destinations.
- Difficult to service businesses by other transport modes.
- Effect on maintenance of roads and structures.
- High percentage of businesses in 'the triangle'.

Environment and Heritage Assets

- Distinctively different from any other County
- 26% of Cornwall is designated as an Area of Outstanding Natural Beauty
- A further 24% is designated as an Area of Great Landscape Value
- Cornwall has 160 Sites of Special Scientific Interest
- 13 designations of Special Area of Conservation
- 5 Sensitive Marine Areas
- Cornwall has the longest coastline of any County in England (697km)
- 6,500 footpaths and 200 miles of cycle routes
- South West Coast Path National Trail
- The Camel Trail
- Highest biodiversity of any comparable sized area in Britain
- 2nd largest number of scheduled Monuments in England
- 60% of landscape is over 500 years old
- Over 140 of Cornwall's historic towns and villages are Conservation Areas
- Forefront of the Industrial Revolution
- World Heritage Site Status bid
- Some prevailing air quality issues (Ozone), but also emerging local 'hot spots' relating to traffic
- Two AQMAs may be declared shortly in Bodmin and Camborne

Environment and Heritage Key Points

- Huge importance of the natural, built and historic environment.
- This presents challenges in taking transport infrastructure proposals forwards.
- Impact of climate change and air quality.

Local and Regional Estimates of Carbon Emissions, 2003 Netcen September 2005								
	CO2 emissions (kt CO2) 2003							
NUTS4 Area and Government Office Region	**Industry and Commercial**	**Domestic**	**Road Transport**	**Land Use Change**	**Total**	**Population Thousands (1)**	**Per capita CO2 (tonnes)**	**Domestic per capita CO2 (tonnes)**
Caradon	155	222	193	38	608	81	7.5	2.7
Carrick	200	242	204	34	679	90	7.6	2.7
Isles of Scilly (3)	4	6	1	0	11	2	5.2	2.7
Kerrier	183	274	179	29	665	95	7.0	2.9
North Cornwall	272	241	309	59	881	83	10.6	2.9
Penwith	97	168	108	21	394	64	6.2	2.6
Restormel	365	245	190	24	824	99	8.3	2.5
Cornwall Total	1275	1396	1185	206	4061	514	7.9	2.7
TOTAL SOUTH WEST	**14793**	**13442**	**11262**	**1475**	**40972**	**4999**	**8.2**	**2.7**
UK TOTAL	262087	163737	128606	13676	568105	59537	9.5	2.8

Exclusions

Aviation	4385
Offshore	5226
Shipping	4150
	13761

Additional emissions included

Road Transport excess over UK inventory

Notes:

Population data are obtained from the Office for National Statistics

NUTS4/Local Authorities with suspected *under-estimated* DTI *electricity consumption* figures for 2003. DTI validation checks using other datasets for England and Wales as comparators have shown that these LAs had significantly *fewer* postcodes as a result of misallocation. Misallocation was due to errors in the data supplied to DTI to allocate postcodes to NUTS4 areas and also partly due to boundaries of postcode districts cannot be exactly marched to Las (Energy Trends, September 2005)

NUTS4/ Local Authorities with suspected over-estimated electricity consumption figures for 2003. These Las had significantly more postcodes as a result of misallocation (see note (2) for explanation).

For detailed information on the following data quality and methodology of these indicative estimates, please read the accompanying Netcen report.
http://www.defra.gov.uk/environment/statistics/globatmos/galocalghg.htm

Detailed Sector Split
CO2 emissions (kt CO2) 2003

NUTS4 Area and Government Office Region	Industrial Electricity	Industrial Gas	Industrial Gas (Exclusions)	Industry Commercial Oil	Industry Commercial Solid Fuel	Industry Commercial Wastes And Biomass	Industry Process Gases	Industry Non Fuel	Industry Off-Road Machinery	Agriculture Oil	Agriculture Solid	Agriculture And Deforestation	Railways
Caradon	77	29		30	4	1	0		2	3	0	3	5
Carrick	98	59		29	2	2			2	1	0	3	3
Isles of Scilly (3)	3			1	0	0			0	0	0		
Kerrier	101	37		29	4	3	0		4	2	0	3	2
North Cornwall	135	46		65	10	1	0		4	5	0	5	1
Penwith	59	13		14	2	0	1		1	1	0	2	2
Restormel	140	140		66	5	2			4	2	0	2	4
Cornwall total	612	325		233	27	10	1		17	13	0	18	17
Total South West	**7095**	**3722**	**257**	**2238**	**377**	**105**	**30**	**353**	**221**	**85**	**2**	**129**	**181**
Total UK	109166	62559	6245	37494	14658	2291	16030	8431	2613	566	12	1058	963

Detailed Sector Split
CO2 emissions (kt CO2) 2003

NUTS4 Area and Government Office Region	Domestic Electricity	Domestic Gas	Domestic Oil	Domestic Solid Fuel	Domestic Home And Garden Machinery	Road Transport Petrol	Road Transport Diesel	Road Transport Other	Land Use Change	Total	Population Count
Caradon	121	60	34	7	0	109	82	3	38	**608**	81
Carrick	134	56	43	8	0	120	81	3	34	**679**	90
Isles of Scilly (3)	4		1	0	0	1	1	0		**11**	2
Kerrier	138	70	51	14	0	107	69	3	29	**665**	95
North Cornwall	135	49	46	10	0	166	139	4	59	**881**	83
Penwith	94	47	19	8	0	65	42	2	21	**394**	64
Restormel	144	56	35	11	0	108	79	3	24	**824**	99
Cornwall total	769	337	229	59	2	676	492	17	206	4061	514
Total South West	**6142**	**5617**	**1402**	**260**	**21**	**6076**	**5033**	**152**	**1475**	**40972**	**4999**
UK Total	65301	84181	9676	4327	252	67670	59253	1683	13676	**568105**	59537

Notes:

(1) Population data are obtained from the following sources:
England and Wales: The Office for National Statistics,
http://www.statistics.gov.uk/downloads/census2001/KS_LA_E&W_part1.pdf

(2) NUTS4/ Local Authorities with suspected under-estimated electricity consumption figures for 2003. Validation checks using other datasets for England and Wales as comparators have shown that these LAs had significantly fewer postcodes as a result of misallocation. Misallocation was due to errors in the data supplied to DTI to allocate postcodes to NUTS4 areas and also partly due to boundaries of postcode districts cannot be exactly matched to LAs. (Energy Trends, September 2005)

(3) NUTS4/Local Authorities with suspected over-estimated electricity consumption figures for 2003. These Las had significantly more postcodes as a result of misallocation (see note (2) for explanation).

(4) Nuts4/Local Authorities with problem in the gas consumption data for 2003. Analysis has shown that the number of domestic gas consumers in these Las significantly exceeds the estimated number of households in these areas (Energy Trends, March 2005). Correspondingly there will be areas that are shown with a lower number of gas consumers than there actually are but because some areas will have a low proportion of gas consumers to households, these are not readily distinguishable at present. Investigations are continuing.

(5) In this project emissions from power stations are re-allocated according to the distribution of electricity consumption. These columns indicate the extent of the re-allocation.

(6) The UK, Wales, Scotland and Northern Ireland totals shown here differ slightly from the totals published in the national inventory reports because some national emission cannot be assigned to local areas. See Section 4.1 of main report for details.

- **Waste**

Re-Calculated Disposal Requirements for MSW and C & I Waste in Cornwall (Tonnes) 2002-2009							
	2003	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**
Collected MSW, of which	**311,681**	**320,687**	327,101	333,643	340,316	347,122	354,064
Recycling/Composting	59,219	**76,709**	81,775	83,410	88,482	93,723	95,597
R/C Composting (%)	19%	24%	25%	25%	26%	27%	27%
Recovered thru' EfW[1]	-	-	-	-	-	-	-
EfW (%)	-	-	-	-	-	-	-
Total Recovery (Recycling & EfW)	59,219	**76,709**	81,775	83,410	88,482	93,723	95,597
Total Recovery (%)[2]	19%	24%	25%	25%	26%	27%	27%
Residual EfW (bottom & fly ash)[3]	-	-	-	-	-	-	-
Total MSW disposed to landfill	252,462	243,978	248,597	253,568	258,640	263,813	258,467
Recovered thru' EfW[5]	-	-	-	-			
Residual EfW	-	-	-	-			
C & I Disposed to landfill	**178,500**	**182,070**	**185,711**	**189,425**	**193,214**	**197,078**	**201,020**
Total MSW & C&I Recovery thru EfW	-	-	-	-	-	-	-
Total Residual EfW (bottom & fly ash)[6]	-	-	-	-	-	-	-
Total MSW and C & I disposal	411,462	406,978	411,597	416,568	421,640	426,813	421,467
Cumulative disposal requirement[7]		**818,440**	**1,230,037**	**1,646,605**	**2,068,245**	**2,495,058**	**2,916,525**

Re-Calculated Disposal Requirements for MSW and C & I Waste in Cornwall (Tonnes) 2010-2014					
	2010	**2011**	**2012**	**2013**	**2014**
Collected MSW, of which	361,146	364,757	368,405	372,089	375,810
Recycling/Composting	101,121	102,132	103,153	104,184	105,227
R/C Composting (%)	28%	28%	28%	28%	28%
Recovered thru' EfW[1]	-	-		160,000	160,000
EfW (%)	-	-	-	43%	43%
Total Recovery (Recycling & EfW)	101,121	102,132	103,153	264,184	265,227
Total Recovery (%)[2]	28%	28%	28%	71%	71%
Residual EfW (bottom & fly ash)[3]	-	-	-	39,887	39,887
Total MSW disposed to landfill	260,025	262,625	265,251	107,904	110,583
Recovered thru' EfW[5]	N/a	N/a		20,000	20,000
Residual EfW				5,000	5,000
C & I Disposed to landfill	**205,040**	**209,141**	**213,323**	**197,590**	**201,942**
Total MSW & C&I Recovery thru EfW				180,000	180,000
Total Residual EfW (bottom & fly ash)[6]	-	-	-	44,887	44,887
Total MSW and C & I disposal	465,065-	471,766	478,574	350,381	357,412
Cumulative disposal requirement[7]	**3,381,590**	**3,853,356**	**4,331,930**	**4,682,311**	**5,039,723**

Notes:

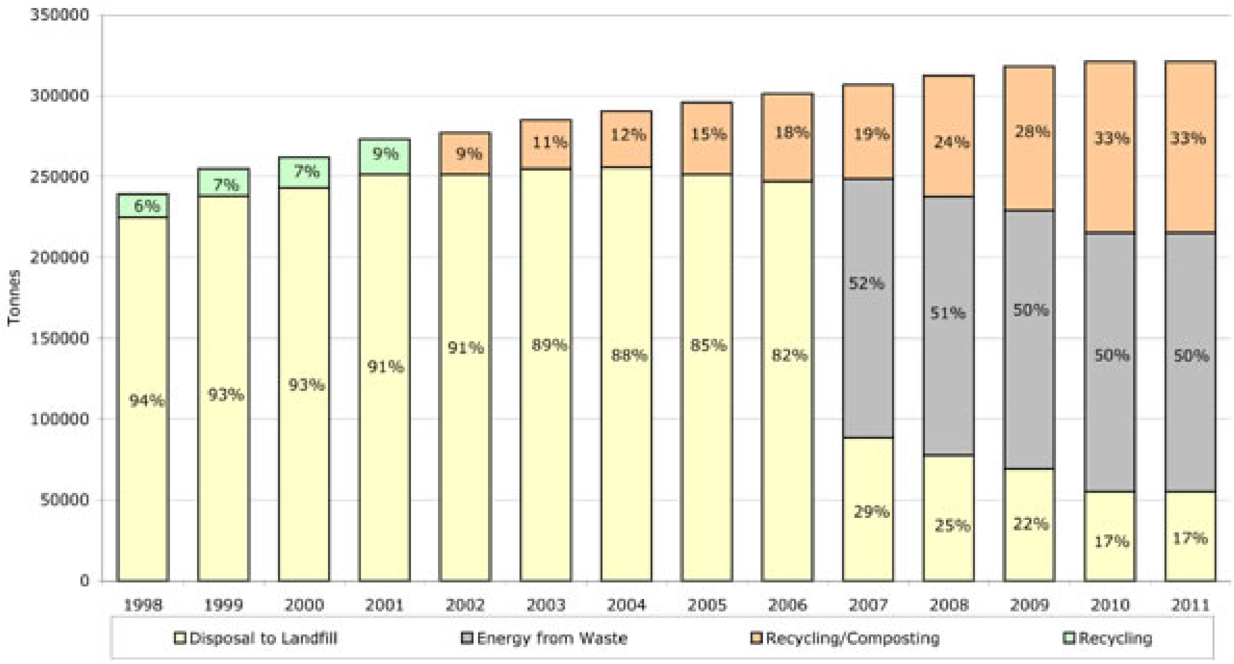
1. MSW figures have been updated using CCC's latest out-turn figures for 2003/04 and 2004/05. CCC has assumed 2% growth to 2010 and 1% thereafter.

2. C&I figures have been updated from Defra C&I Waste which showed 175,000 tpa landfilled in 2002/03. Have assumed that growth rate has slowed from 7% compound from 1998 – 2003, to a steady 2% per annum as assumed by other rural counties.

Connon Bridge and United Downs each have 1.5 million cubic metres void space sufficient for 3,000,000 tonnes of landfill and Viridor's Lean Quarry has a licence for 100,000 tpa but may just take Devon Waste. If so, there is a shortfall of 2 million cubic metres of landfill void space by 2014 as well as the county having insufficient EfW to avoid continuing to pay annual LATS penalties throughout the period until 2020/21 when LATS may end.

Municipal Solid Waste

Actual and Predicted Arisings, Rates of Recycling/Composting, Potential Capacity of Energy from Waste, and Predicted Disposals to Landfill



Sites and Premises

Employment sites and premises

Recent indicators for demand for workspace are shown below in the sample 3 tables and whilst there is clearly lack of supply of appropriate workspace for Businesses in Cornwall there is no overall single accurate measure of the true demand.

This in part will be because much of the demand will be hidden and supply driven – only emerging when speculate development takes place – an example of this is Tolvaddon energy park – at the time of development there was no absolute demand study that indicated 32,000 sq ft of high quality space was required in Redruth but as hindsight has shown the units are fully let.

Caradon District council enquiry figures show a steady increase in the level of enquires year on year with in the order 0f a 400% increase in the level of enquires in the period 1990 to 2004.

Caradon and North Cornwall district Councils have recently completed in depth demand studies for employment sites and premises as have Cambourne Poole Redruth U.R.C… The U.R.C. has indicated that the evidence currently suggests that there is demand for up to 50,000 sq ft of development for employment space each year – which a similar interpretation reported by Caradon EDO officers following the production of their report .

This would suggest that in these two population centres with a total of 110,000 population the demand is estimated to be as much as 100,000 sq ft per annum.

EMPLOYMENT LAND ANALYSIS – CCC PLANNING ESTIMATES (In Hectors)	
Category	**Cornwall "Most up to Date"**
Occupied Developed	577
Vacant Developed	50
Land under Construction	3
Serviced Land with Planning Permission	62
Access with Planning Permission	57
Un-serviced with Planning Permission	23
Serviced without Planning Permission	0
Accessed without Planning Permission	12
Un-serviced without Planning Permission	7
Allocated	135
TOTAL	**926**

Source: Cornwall County Council Planning Department

RDA Cornwall area - Summary of premises Enquiries from October 2004 to September 2005		
Month	**Total no of Enquiries**	**Total Sq M**
September 2005	13	2926
August 2005	16	1997
July 2005	13	3437
June 2005	13	1161
May 2005	12	6805
April 2005	11	3112
March 2005	8	1951
February 2005	10	1370
January 2005	27	3066
December 2004	17	4292
November 2004	33	8826
October 2004	24	4622
Totals for Year	**197**	**43565**

Source: Regional Development Agency Estates Department

Cornwall Pure Business Property Enquiries July 2005			
Type of premises	**Location**	**Size**	**Sector / type of business**
Office	County-wide	2-3,000 sq ft	Software
Industrial	Camborne Pool Redruth	2,000 sq ft	Printing
Industrial	Penzance	750-1,000 sq ft	Manufacturing
Office	Liskeard/Truro	2-3,000 sq ft	Media
Office	Newquay	1,000 sq ft	IT
Office	Saltash/Callington	2,000 sq ft	Engineering
Office/laboratory	North Cornwall	8,000 sq ft	Science/distribution
Office	Truro	500-1,000 sq ft	IT
Industrial	North/East Cornwall	350-500 sq ft	Engineering
Office	North/East Cornwall	150-250 sq ft	Creative
Industrial	North/East Cornwall	6,000 sq ft	Engineering
Industrial/Office	North Cornwall	3,000 sq ft	Medical
Industrial/Office	Camborne Pool Redruth	1-1,500 sq ft	N/A
Office	Bude	3,500 sq ft	Distance Learning
Industrial	Newquay-Bude	1,000 sq ft	Manufacturing
Office/Industrial	Saltash	6-8,000 sq ft	IT/electronics
Office	East Cornwall	6,000 sq ft	Business Services
Industrial	Truro/CPR	1,000 sq ft	Engineering

Source: Cornwall Pure Business

CARADON DISTRICT COUNCIL - Summary of business needs analysis										
	1990		1991		1992		1993		1994	
TYPE OF ENQUIRIES	No	%	No	%	No	%	No	%	No	%
Land	36	18%	9	6%	7	6%	6	3%	15	5%
Premises	92	46%	75	47%	65	52%	152	66%	187	65%
Finance	24	12%	34	22%	28	22%	52	23%	52	18%
Relocation	9	4%	1	1%	5	4%	-	-	-	-
Advice	40		39	24%	21	16%	20	8%	35	12%
Total	**201**	**100%**	**158**	**100%**	**126**	**100%**	**230**	**100%**	**289**	**100%**
	1995		1996		1997		1998		1999	
	No	%	No	%	No	%	No	%	No	%
Land	15	5%	23	8%	32	10%	30	9%	22	5%
Premises	194	67%	199	65%	204	63%	208	61%	215	48%
Finance	44	15%	29	10%	15	5%	29	9%	33	7%
Relocation	-	-	-	-	-	-	-	-	-	-
Advice	37	13%	52	17%	71	22%	74	21%	177	40%
Total	**290**	**100%**	**303**	**100%**	**322**	**100%**	**341**	**100%**	**447**	**100%**
	2000		2001		2002		2003		2004*	
	No	%	No	%	No	%	No	%	No	%
Land	42	8%	38	7%	28	5%	30	4%	37	4%
Premises	245	44%	250	46%	301	51%	380	52%	395	42%
Finance	43	8%	24	4%	15	3%	36	5%	193	13%
Relocation*	-	-	-		0	0%	0	0%	59	6%
Advice	222	40%	233	43%	241	41%	279	39%	332	35%
Total	**552**	**100%**	**545**	**100%**	**585**	**100%**	**725**	**100%**	**1016**	**100%**

** the 2004 total includes those enquirers that have requested more than one type of information e.g. premises and advice*
Source: Caradon District Council E.D.O. Department

- **Broadband Infrastructure**

Summary of Broadband Facts & Figures

Exchanges

Total number exchanges in Cornwall	100
Total upgraded for adsl broadband	99

Source: Actnow Project

Remaining exchange planned Spring 2006

Connections

Total number SMEs connected	7019 (2)
Total number SME connections	7916
Overall SME penetration in Cornwall (1)	39%
Total number domestic connections	65000
Total domestic penetration per 100 pop	13%

Source: Actnow Project

Based on 18000 businesses supplied by Business Link, figure currently being refined
Excludes all SMEs not claiming rebate through actnow. Analysis shows this to account for approx 500 that are traceable and to be encouraged to claim.

Global Scene

OECD figures June 2005, connections per 100 population. UK currently lies in 13th place

Korea	25.6	Belgium	17.6
Hong Kong	22.9	Israel	16.5
Netherlands	21.9	Sweden	16.4
Denmark	21.5	Japan	16.2
Switzerland	20.1	France	13.9
Canada	19.2	UK	13.7
Taiwan	17.8	USA	13.1

Source: Actnow Project

UK broadband growth is currently one of the strongest – figures from Dec 2004 show UK penetration at 10.4.

Cornwall shows a current penetration level of 13.0, growing particularly strongly at present following a large number of exchanges being enabled in the period Apr-Jul 2005.

SME Penetration Breakdown

Average SME penetration bottom 1/3 of exchanges	17%
Average SME penetration mid 1/3 of exchanges	33%
Average SME penetration top 1/3 of exchanges	47%

Source: Actnow Project

The long term target of connecting 10000 SMEs to broadband would ensure an overall penetration level in excess of 50%. Additionally, a penetration level of 33% across all exchanges is a project objective.

Well defined laggard areas unrelated to the programme of exchange enablement exist in East & North Cornwall. Targeted marketing and investigations underway are underway into these areas.

Fuller details on take-up levels in individual exchanges are as below -

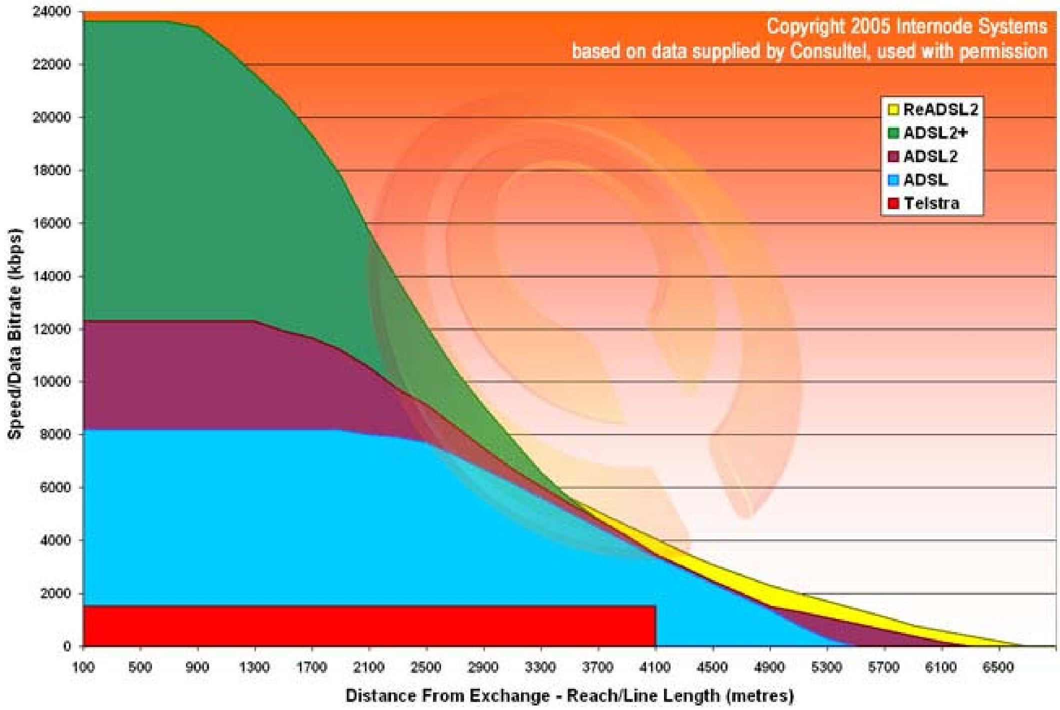
NUMBER OF CONNECTIONS (BY EXCHANGE)

	Number of Connections	Number of SMEs	Target (50% penetration)	Penetration (%)			Number of Connections	Number of SMEs	Target (50% penetration)	Penetration (%)
St Mawes	2	52	26	4		Portscatho	18	56	28	32
Landrake	4	64	32	6		Fowey	43	133	67	32
Roche	7	111	56	6		Cardinham	9	27	14	33
Polperro	7	98	49	7		Stenalees	41	122	61	34
Morwenstow	4	40	20	10		Mitchell	21	62	31	34
Bridgerule	6	50	25	12		Germoe	38	112	56	34
Tresillian	5	38	19	13		Scillonia	41	120	60	34
Mullion	15	113	57	13		Widegates	21	60	30	35
Gunnislake	20	149	75	13		Boscastle	20	57	29	35
St Buryan	9	61	31	15		Porthtowan	19	53	27	36
Millbrook	15	100	50	15		Stithians	33	91	46	36
Torpoint	29	192	96	15		St Austell	322	882	441	37
North Petherwin	8	51	26	16		St Keverne	26	71	36	37
Piperspool	12	75	38	16		Camelford	67	182	91	37
Otterham	9	56	28	16		Veryan	10	27	14	37
St Germans	7	41	21	17		Par	111	298	149	37
Lanreath	10	58	29	17		Perranporth	91	241	121	38
Kilkhampton	10	56	28	18		Liskeard	188	497	249	38
Fraddon	19	106	53	18		Manaccan	11	29	15	38
Leedstown	10	53	27	19		Mawgan	16	42	21	38
Padstow	25	132	66	19		Cockwells	30	78	39	38
Trebetherick	21	107	54	20		Camborne	251	649	325	39
St Gennys	6	30	15	20		St Just	61	149	75	41
Week St Mary	9	44	22	20		Launceston	217	530	265	41
Grampound Road	31	151	76	21		Hayle	164	385	193	43
The Lizard	11	51	26	22		Coads Green	29	68	34	43

Praze	20	92	46	22		Bodmin	256	598	299	43
Sennen	8	36	18	22		St Agnes	57	132	66	43
Mousehole	13	57	29	23		Wadebridge	163	373	187	44
Marazion	26	111	56	23		Truro	610	1387	694	44
St Mawgan	12	50	25	24		St Day	61	138	69	44
St Tudy	24	96	48	25		Three Waters	69	154	77	45
St Dominick	20	78	39	26		Penzance	488	1082	541	45
Canworthy Water	11	42	21	26		St Merryn	28	61	31	46
Rumford	16	61	31	26		St Columb	58	126	63	46
Mawnan Smith	16	60	30	27		Helston	260	546	273	48
Polruan	7	26	13	27		Newquay	497	1036	518	48
Dobwalls	27	99	50	27		St Ives	285	592	296	48
Port Isaac	19	69	35	28		Widemouth	21	43	22	49
Portreath	25	88	44	28		Mevagissey	81	162	81	50
Crantock	16	56	28	29		Lanivet	36	72	36	50
Stoke Climsland	17	59	30	29		Bude	203	403	202	50
Downderry	9	31	16	29		Redruth	379	735	368	52
Looe	92	313	157	29		Tregoney	18	33	17	55
Tintagel	26	86	43	30		Devoran	120	218	109	55
Saltash	157	514	257	31		Constantine	37	67	34	55
Rilla Mill	31	100	50	31		Falmouth	473	803	402	59
Callington	70	224	112	31		Penryn	283	479	240	59
Nanpean	42	133	67	32		Zelah	12	20	10	60
						Lostwithiel	110	172	86	64
						St Mabyn	27	32	16	84
						Total	**7545**			

Source: Actnow Project

(Narrative needed for the table below)



CONCLUSION