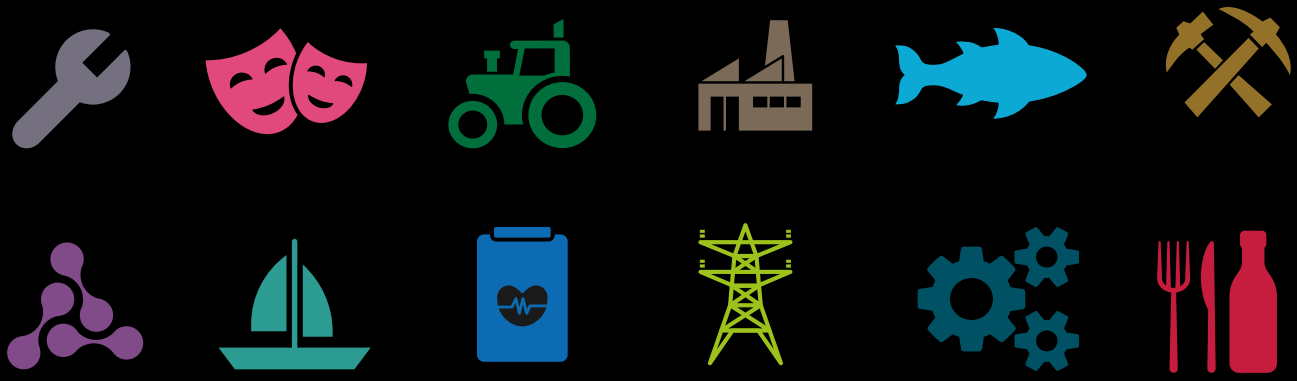
Cornwall Chamber of Commerce

Cornwall Can Be

Kernow A Yll Bos

Foundations for our future: an economic analysis of Cornwall Enterprise Clusters



University of Exeter

IFOW Institute for the Future of Work

UNDERSTANDINGDATA

We are listening to businesses across Cornwall about the key challenges and opportunities for growth

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1 Introduction

Cornwall Chamber of Commerce is launching a fresh campaign, **Cornwall Can Be**, with an open invite for businesses and partners to join us as we develop the policies that Cornwall needs to thrive and prosper.

We are listening to businesses across the Duchy about the key challenges and opportunities for growth. So far, we have heard five core challenges that we believe will shape the future of Cornwall's economy:

People and workforce:
Business leaders tell us that securing enough people with the right skills to drive growth is a top priority. We recognise that we cannot solve this challenge solely by competing in national and global talent markets; we must also focus on 'growing our own' talent at every life stage.

Finance and investment:
Increasing access to private finance is essential for all sectors to thrive in Cornwall. We must also work closely with the Government to avoid a cliff edge

Homes and built environment:
It is widely recognised that Cornwall needs more homes, at prices that workers can afford, to sustain the workforce required to grow the economy. In addition, the lack of larger commercial premises often forces businesses born in Cornwall to grow elsewhere.

Connective infrastructure:
As the start of the line, Cornwall requires robust digital and transport infrastructure to support all sectors. Specialist infrastructure, like energy grid and port upgrades, is also crucial to unlock our potential to power the national economy with clean energy.

New technologies:
Preparing businesses for new technologies, such as Artificial Intelligence and the transition to net zero, is essential if Cornwall is to thrive and remain competitive. However, the Disruption Index has identified Cornwall as one of the regions least ready for technological change.

These challenges may be significant, but so is the opportunity. Cornwall has already demonstrated its capacity to power the national economy with clean energy and critical minerals, backed by world-class environmental research. Cornwall Can Be a leader in the data and satellite industries, while Cornish creativity and ingenuity continue to drive growth in sectors from manufacturing to the digital and creative industries.

Cornwall Enterprise Clusters

For too long, regional growth strategies have focused on a narrow subset of Cornwall's vibrant business community. At the Chamber of Commerce, we know that every business has a role to play in Cornwall's success. With Cornwall Can Be, we have built our campaign on firm foundations, starting with robust analysis of the whole of Cornwall's economy.

The Cornwall Enterprise Clusters reveal the contribution of each sector to our economy:

Building Cornwall:
Property and construction enterprises representing

11.3% of total employment and

28.8% of Cornwall's GVA.

Creative Cornwall:
Communications, culture, and creative enterprises representing

2% of total employment and

1.7% of GVA.

Cultivate Cornwall:
Farming, forestry, and horticulture enterprises representing

6.1% of employment and

5.3% of GVA.

Digital Cornwall:
Telecommunications and technology enterprises representing

1.4% of employment and

1.9% of GVA.

Enjoy Cornwall:
Leisure, retail, and hospitality enterprises representing

21.1% of employment and

14.3% of GVA.

Health & Care Cornwall:
Health, social care, and childcare enterprises representing

13.8% of employment and

9.1% of GVA.

Manufacturing Cornwall:
Manufacturing enterprises representing

4% of employment and GVA.

Marine Cornwall:
Fishing, fleet, and sea freight enterprises representing

1% of employment and

1.1% of GVA.

Mining & Critical Minerals Cornwall:
Mining and quarrying enterprises representing

0.3% of employment and

0.7% of GVA.

Power & Supply Cornwall:
Utilities, wholesale, and logistics enterprises representing

10.9% of employment and

8.7% of GVA.

Skills & Services Cornwall:
Education, administrative, and professional service enterprises representing

16.2% of employment and

17.7% of GVA.

Taste Cornwall:
Food and drink enterprises representing

1.7% of employment and

6.8% of GVA.

Next Steps

This report serves as the launch prospectus for our campaign, Cornwall Can Be. We invite everyone—businesses, partners, and stakeholders—to join us in shaping a **Call for Cornish Enterprise**, addressing:

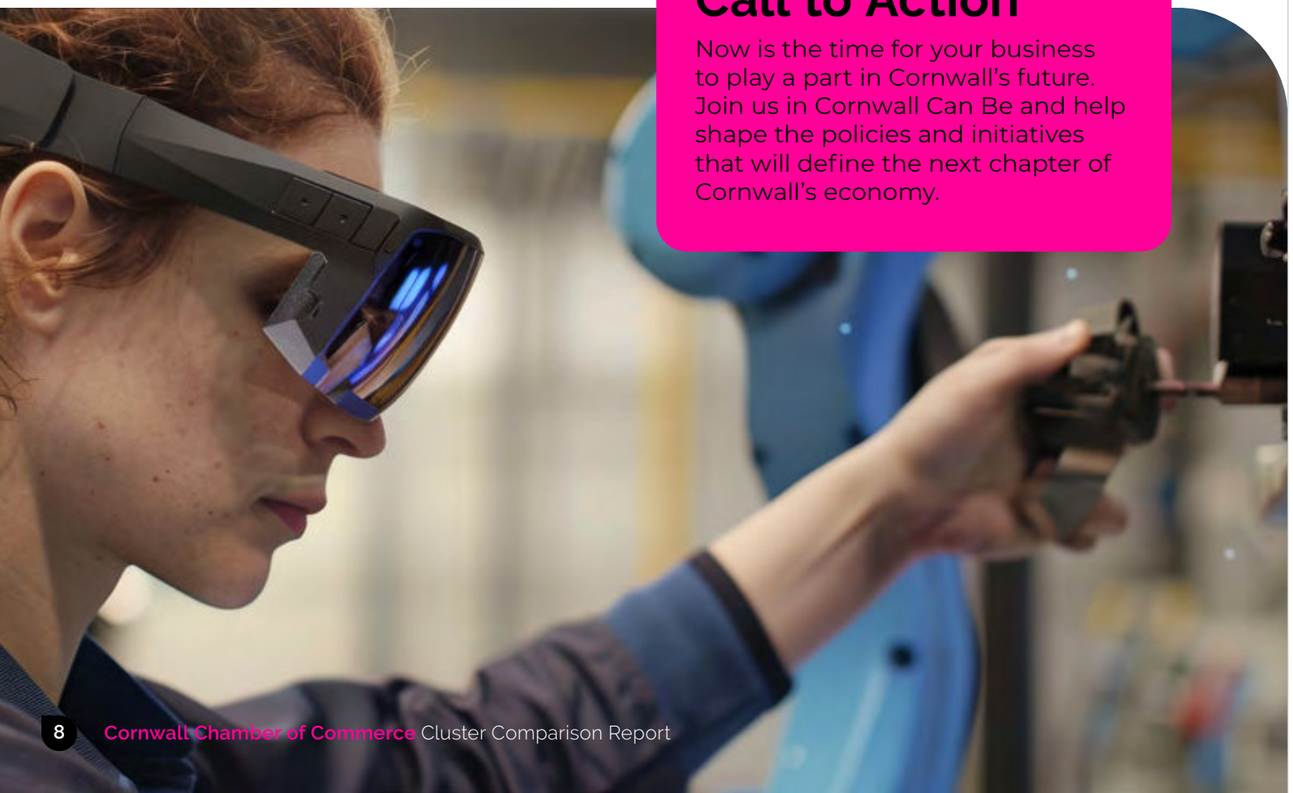
- The five core challenges we have heard from businesses across all sectors, which form the strategic themes of our work programme.
- The distinctive features of our twelve **Cornwall Enterprise Clusters**, which are the sector strands of our work programme.

Building on the insights gathered through this report, we will take forward a series of actions designed to support businesses, strengthen collaboration, and influence positive change across the region. We will:

- Support each **Cornwall Enterprise Cluster** in identifying its key priorities and plans to unlock the full economic potential of its sector. Where strong infrastructure and support already exist—such as in the Cornwall Manufacturing Group, Tech Cornwall, or Cornwall Marine Network—we will work collaboratively with these organisations. For clusters with more fragmented or underdeveloped collaboration infrastructure, Cornwall Chamber of Commerce will help convene business leaders to set priorities and coordinate plans.
- Establish Cornwall Can Be working groups aligned with each **Cornwall Enterprise Cluster**. Members will be invited to join one primary working group and can join up to two more to stay informed. These groups will provide insights, policy recommendations, and advocacy platforms, feeding into the overarching Cornwall Can Be campaign.

Call to Action

Now is the time for your business to play a part in Cornwall's future. Join us in Cornwall Can Be and help shape the policies and initiatives that will define the next chapter of Cornwall's economy.



2 Definitions & Methods

Given the remit of this project, to set out available data for a recognisable group of economic activity clusters, it is important to understand what this work both represents and isn't intended to represent.

It is an alternative to the high level Standard Industrial Classification (SIC) codes (21 sections[1] or 18 broad industrial groups[2]) with 12 Clusters of activity defined at the most detailed SIC level available (5 digit).

It is a mix of cross cutting aggregations (Creative, Marine, Digital) and Clusters based more closely on Sections, and Broad Industrial groups (Health and Social Care)

In employment terms the twelve Cornwall Enterprise Clusters represent 100%of employment in Cornwall.

It is not intended to reflect the more nuanced and detailed sector groupings that provide advice, support and lobbying on behalf of members (E.g. Cornwall Marine Network and Cornwall Manufacturing Group). It has not attempted to split economic activity of companies where 5 digit SIC coding is still broad.

To analyse and categorize economic clusters within Cornwall, the methodology employed needed to balance rigour with practicality, particularly given the strengths and limitations of Standard Industrial Classification (SIC) codes.

The approach taken by the Cornwall Chamber of Commerce was designed to produce a nuanced understanding of the region's economic landscape for each "Cornwall Enterprise Cluster" integrating both key indicators and relevant insights from local stakeholders.

We wanted to understand the employment, company and GVA characteristics of a business focused and pragmatic grouping of economic activity within Cornwall.

To this end a first attempt of a matching exercise was undertaken by a steering group of the project partners to match existing SIC codes to "Cornwall Enterprise Cluster" definitions. This was then tested and revised by Understanding Data to ensure consistency where national definitions of cross cutting sectors are in common use, for example around the Creative and Digital Cornwall Enterprise Clusters. A clear focus in this exercise was to maximise the efficient use of available economic data at sectoral level.

SIC codes range from 5 digit (Sub Class), 4 digit (Class), 3 digit (Groups) 2 digit (divisions) to 1 digit (Sections which use the letters A-U, e.g. C: Manufacturing). When possible, we have used 5 digit SIC codes in the definitions of groupings.

This work and the supporting individual Cornwall Enterprise Cluster profiles use a detailed 5 Digit SIC code definition for each Cluster. All 5 digit sectors are considered in this work. Appendix A sets out a group of Cluster tables showing 5 digit SIC code allocation. Appendix B shows the relationship between SIC Sections and Clusters.

We are aware that elements of economic activity don't always fit neatly into a single category. We also know that even at 5-digit

SIC code level a single descriptor may not adequately cover the range of activity within that sub class/code.

This project did not have the scope to undertake primary research to unravel the split of activity at a 5 digit level, and typically allocation has happened where the probability of a clear majority of activity is likely to take place.

Data

The Office for National Statistics (ONS) publish detailed **employment and company data at 5-digit SIC level** for the Cornwall region[3]. This means that the estimates contained within this work for employment and company composition are as detailed as is possible, for the period 2015 to 2022[4].

Gross Value Added (GVA) data is available at 2-digit SIC level from the ONS as part of their Regional GVA releases. To enable the use of this GVA data the following process was followed:

- Where 2-digit Divisions were found within a **Cornwall Enterprise Cluster** in their entirety, the whole GVA output was allocated to that cluster
- Where a 2-digit Division was split between 2 or 3 **Cornwall Enterprise Clusters**, an employment share was calculated (using the 5-digit employment data for 2022) across these split Divisions – and then these proportions were applied to the whole Division GVA total to allocate part of that GVA total to individual Divisions within each cluster.

For **Wages[5] and Productivity data[6],** that had part of a Division in different clusters, some overlap was deemed appropriate. In this case, rather than calculate a blended figure – say for output per hour, we have presented the range of output per hour by divisions that are wholly or partly within each cluster. This has been tested against 2022 employment data so that any commentary associated with high or low wages or productivity is clear whether it actually applies to Cornwall through the presence of actual economic activity.

3 Cornwall Enterprise Cluster analysis

This section reviews the key data across each of the Cornwall Clusters to allow for a visual at a glance understanding of the differences and scale of these clusters across the whole economy.

3.1 Employment

There are two main sources of employment data published by the Office for National Statistics (ONS). These are the Business Register and Employment Survey (BRES) which has data for employees, total, full time and part time and total employment[7] by sector. This data also has a breakdown by geography – local authorities and smaller statistical and administrative areas like wards and output areas, and by industry with an available menu of broad industrial groups, sections, and 2,3 4 and 5 digit groupings under the 2007 Standard Industrial Classification coding system.

The Cornwall latest data (for 2022) shows:

An alternative source of employment data a total jobs[8] measure within the Jobs Density release from ONS does not have an industry breakdown and while it is available at local authority level it does not have any lower geography data available. However, the total jobs measure for 2022 in Cornwall is 283,000.[9] The difference to total employment is broadly due to the Jobs Density total jobs measure including the self-employed. This is an important distinction – the detailed Cornwall Cluster data focuses on employment not self-employment.

Table 2 **2022 Employment Estimates Cornwall Enterprise Clusters**

Cluster	Employees	Full-Time Employees	Part-Time Employees	Employment
Building Cornwall	25,000	19,000	5,000	28,000
Creative Cornwall	5,000	3,500	1,750	5,000
Cultivate Cornwall	6,000	4,500	1,500	15,000
Digital Cornwall	3,500	3,000	400	3,500
Enjoy Cornwall	49,000	22,000	28,000	52,000
Health & Care Cornwall	34,000	19,000	15,000	34,000
Manufacturing Cornwall	10,000	9,000	900	10,000
Marine Cornwall	2,250	2,000	250	2,500
Mining & Critical Minerals Cornwall	800	800	5	800
Power & Supply Cornwall	25,000	20,000	5,000	27,000
Skills & Services Cornwall	39,000	24,000	16,000	40,000
Taste Cornwall	28,000	13,000	88,000	29,000

Table 3 **2022 Employment Estimates - share (%) of total**

Building Cornwall	11	13.6	5.7	11.3
Creative Cornwall	2.2	2.5	2	2
Cultivate Cornwall	2.6	3.2	1.7	6.1
Digital Cornwall	1.5	2.1	0.5	1.4
Enjoy Cornwall	21.5	15.7	31.8	21.1
Health & Care Cornwall	14.9	13.6	17	13.8
Manufacturing Cornwall	4.4	6.4	1	4
Marine Cornwall	1	1.4	0.3	1
Mining & Critical Minerals Cornwall	0.4	0.6	0	0.3
Power & Supply Cornwall	11	14.3	5.7	10.9
Skills & Services Cornwall	17.1	17.1	18.2	16.2
Taste Cornwall	12.3	9.3	17	11.7
Cornwall total	**228,000**	**140,000**	**88,000**	**247,000**

Table 2 Source: ONS BRES
Table 3 Source: ONS BRES. Notes: Conditional formatting highlights low to high range.

Employment

The three largest clusters by employment are;

1 Enjoy Cornwall

2 Skills & Services Cornwall (includes most of the wider public sector)

3 Health & Care Cornwall

Full time employment

The three largest clusters for Full time employment are:

1 Skills & Services Cornwall

2 Enjoy Cornwall

3 Power & Supply Cornwall

Part time employment

The three largest clusters by Part time employment are;

1 Enjoy Cornwall

2 Skills & Services Cornwall (includes most of the wider public sector)

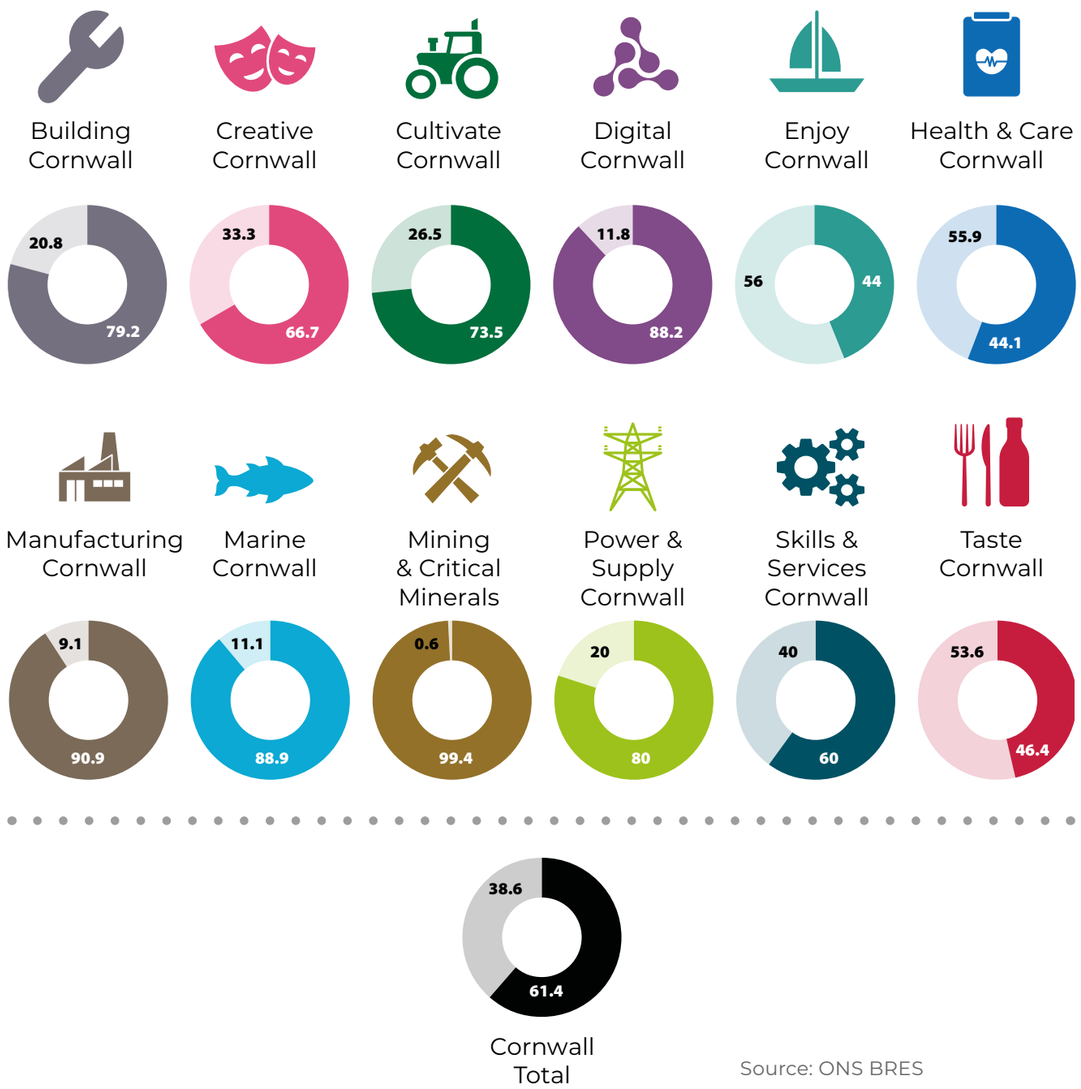
3 Health & Care Cornwall and Taste Cornwall

By some margin, Mining & Critical Minerals has the fewest number of jobs at 800, with Marine (2,500) and Digital (3,500) the next smallest in 2022.

The full and part time splits show considerable variance in the type of employment across sectors, with both Taste and Enjoy clusters having a greater share of PT work and Mining and Critical Minerals, Marine and Manufacturing showing very high levels of FT work.

Figure 4 **FT / PT variance by Cluster 2022**

= Full time employment
= Part time employment



Source: ONS BRES

There are some notable variations, with high levels of PT work (and low levels of FT work) in Enjoy and Taste (more than 50% PT work) and Health and Care (44.6% PT) and high levels of FT work in Mining & Critical Minerals, Manufacturing, Marine and Digital (all over 88% FT)

Consistent employment data over time is available for the period 2015-2022. This shows further differences in the rate of growth of employment, or for some clusters, a decline in employment.

Table 5 **% Change in employment 2015-2022**

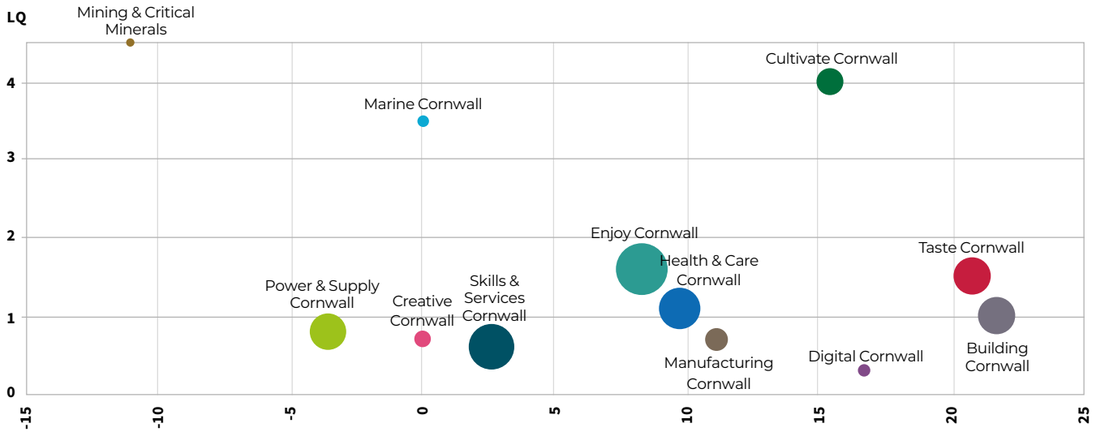
Cluster	Employees	Full-Time Employees	Part-Time Employees	Employment
Building Cornwall	18.8	0		21.7
Creative Cornwall	40	40		0
Cultivate Cornwall	28.6	-14.3		15.4
Digital Cornwall	33.3	14.3		16.7
Enjoy Cornwall	4.8	16.7		8.3
Health & Care Cornwall	18.8	7.1		9.7
Manufacturing Cornwall	28.6	28.6		11.1
Marine Cornwall	0	0		0
Mining & Critical Minerals Cornwall	-11.1	-80		-11.1
Power & Supply Cornwall	-9.1	0		-3.6
Skills & Services Cornwall	14.3	-11.1		2.6
Taste Cornwall	18.2	36.4		20.8
Cornwall total	**12**	**8.6**		**9.3**
England total	**8.8**	**7.6**		**7.8**

Source: ONS BRES

For overall employment 7 clusters have grown more than the England average, with particularly high growth in the Building Cornwall and Taste Cornwall Clusters. There was declining employment within the Mining & Critical Minerals[9] and Power & Supply Cornwall Enterprise Clusters.

The following figure shows the overall scale of Clusters, the % change in employment between 2015-2022 and the Location Quotient (LQ) of the Cluster in Cornwall compared to nationally. So, for example the largest Cluster by employment is Enjoy Cornwall, (the largest bubble), the highest growth was seen Building Cornwall (the furthest right value) and the highest LQ are Mining and Critical Minerals Cornwall, Marine and Cultivate Cornwall (the top bubbles).

Figure 6 **Cluster Employment Location Quotient (LQ)**



Source: ONS BRES

A value of 1.0 means that an industry share of employment in a given area is the same as its share of national employment. For example, industry X makes up 5% of employment in region r and also 5% of employment in Great Britain. A value greater than 1.0 means that industry i makes up a larger share of employment in the local area than at the national level.

There is no strong correlation between high LQ and stronger employment growth.

Table 7 **LQ and Employment Change % by Cluster**

	LQ	2015-2022 Employment Change %
Building Cornwall	1.0	21.7
Creative Cornwall	0.7	0
Cultivate Cornwall	4.0	15.4
Digital Cornwall	0.3	16.7
Enjoy Cornwall	1.6	8.3
Health & Care Cornwall	1.1	9.7
Manufacturing Cornwall	0.7	11.1
Marine Cornwall	3.5	0
Mining & Critical Minerals Cornwall	4.5	-11.1
Power & Supply Cornwall	0.8	-3.6
Skills & Services Cornwall	0.6	2.6
Taste Cornwall	1.5	20.8

Source: ONS BRES

3.2 Business Counts and Structure

The key data source used to understand changes in company structure is the UK Business Counts (UKBC) . This dataset uses two different descriptions of companies – local units[10] and enterprises[11]. Aside from overall change in numbers, the local unit data has associated employment size band and legal status for the private sector, and enterprise data has employment size band, turnover bands and legal status for private sector companies.

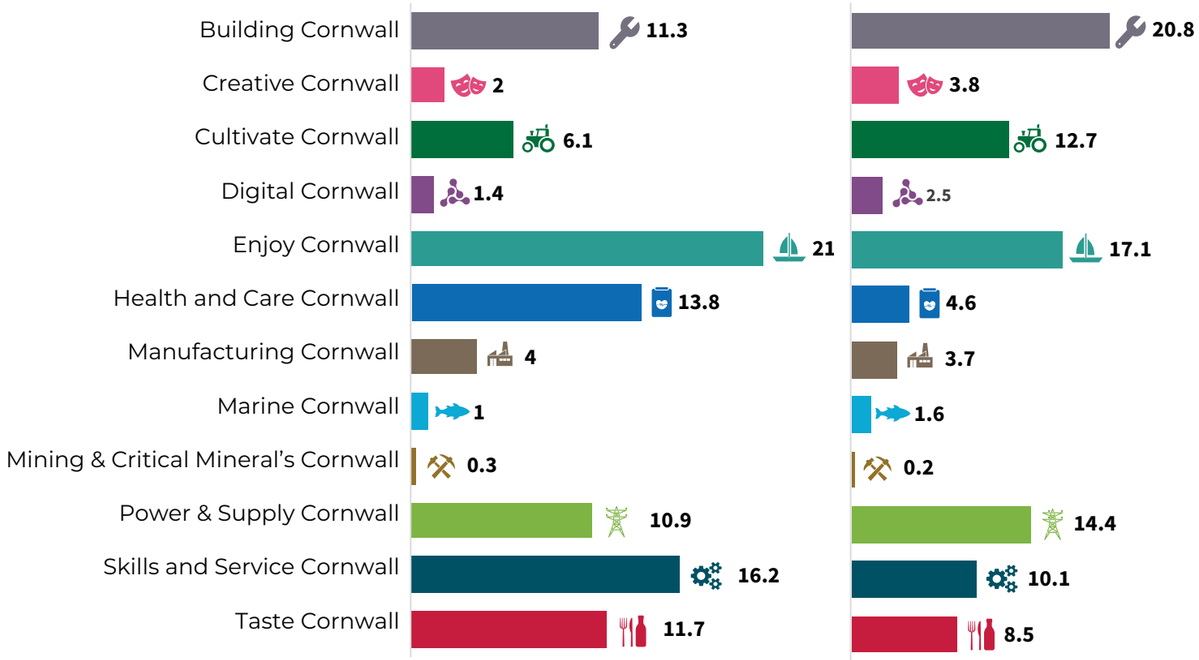
The latest data is 2023 (compared to 2022 for employment and GVA). For change over time analysis 2015-22 is used for consistency – for current company characteristics, the latest data (2023) is used.

Table 8 **2023 Company Estimates Enterprises and Local Units**

	Enterprises	Local Units
Building Cornwall	5,845	6,180
Creative Cornwall	1,085	1,115
Cultivate Cornwall	3,605	3,760
Digital Cornwall	675	735
Enjoy Cornwall	3,805	5,080
Health & Care Cornwall	805	1,355
Manufacturing Cornwall	1,035	1,100
Marine Cornwall	460	475
Mining & Critical Minerals Cornwall	25	50
Power & Supply Cornwall	3,700	4,275
Skills & Services Cornwall	2,285	2,995
Taste Cornwall	2,025	2,530
Cornwall total	**25,350**	**29,650**

Source: ONS BRES

Figure 9 **Employment Share**



Company Share

Source: ONS UKBC and BRES

Figure 9 highlights a share of businesses against the share of employment. There are some "swings" both ways with higher shares of employment in both Health & Care Cornwall and Skills & Service Cornwall (the 2 Clusters that are more Public sector) and Enjoy Cornwall, but lower shares of employment in Building, Power & Supply Cornwall, Digital and Creative Cornwall.

Table 10 **Change over time 2015-2022**

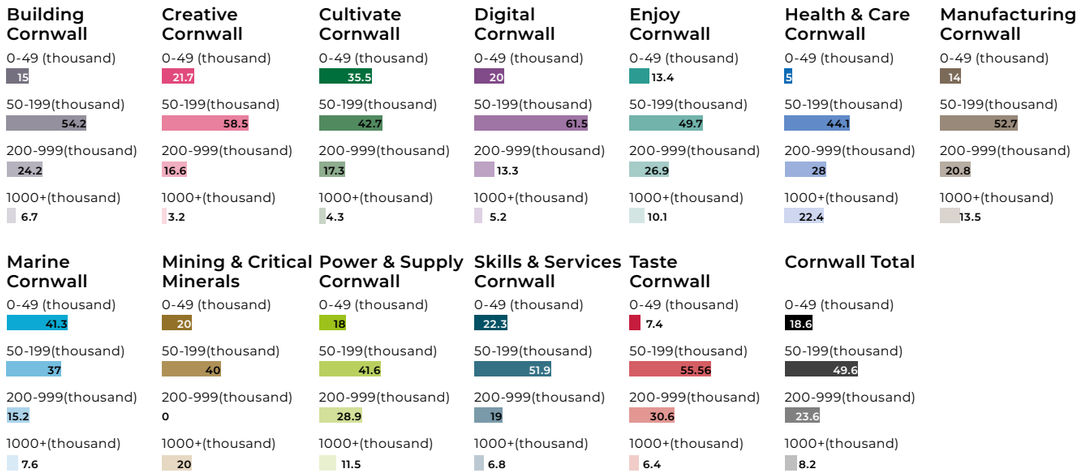
	Local Units Change %	Local Units	Employment Change for comparison (2022)
Building Cornwall	22.2	25.6	21.7
Creative Cornwall	15.8	19	0
Cultivate Cornwall	-7.3	-8.5	15.4
Digital Cornwall	14	14.3	16.7
Enjoy Cornwall	3.2	3.2	8.3
Health & Care Cornwall	-7.9	-6.5	9.7
Manufacturing Cornwall	13.3	13.1	11.1
Marine Cornwall	4.5	4.7	0
Mining & Critical Minerals Cornwall	0	0	-11.1
Power & Supply Cornwall	18.2	22.1	-3.6
Skills & Services Cornwall	4	12.6	2.6
Taste Cornwall	17	13.9	20.8

Source: ONS UKBC and BRES

2 Clusters had less registered businesses in 2022 compared to 2015 – Cultivate Cornwall and Health and Care Cornwall, but two different Clusters (Mining & Critical Minerals Cornwall and Power & Supply Cornwall) saw employment fall.

Table 11 sets out the turnover bands for enterprises across the clusters. The highest prevalence of higher turnover is found in Health & Care Cornwall, Mining & Critical Minerals Cornwall and Power & Supply Cornwall. The highest share of lower turnover is found within Marine Cornwall and Cultivate Cornwall Clusters.

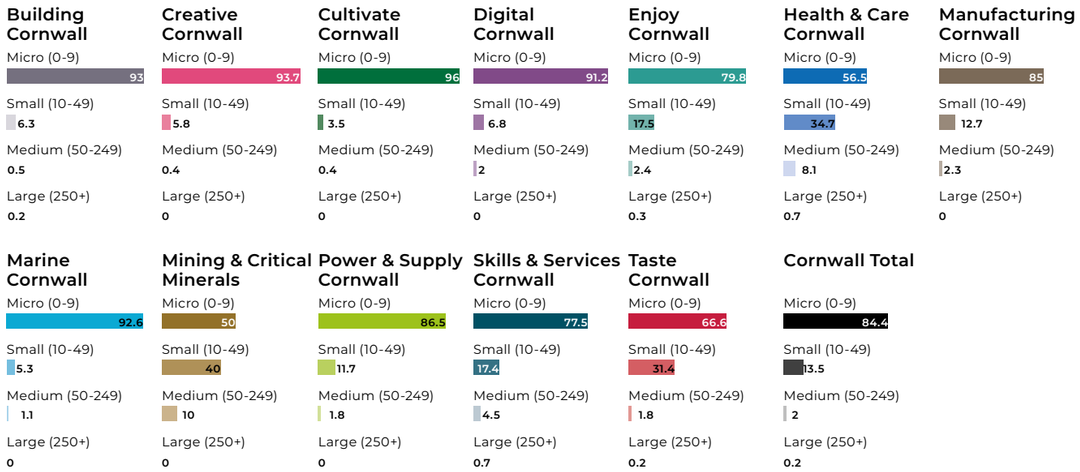
Figure 11 **Turnover (Enterprises) 2023**



Source: ONS UKBC

Figures 12 A & B set out the size band for both local units and enterprises. For Local Units the Cultivate Cornwall, Creative Cornwall and Building Cornwall Clusters have high level of businesses classed as micro (employing 0-9), whereas Skills & Services Cornwall and Health & Care Cornwall have a higher share of businesses employing over 250 employees.

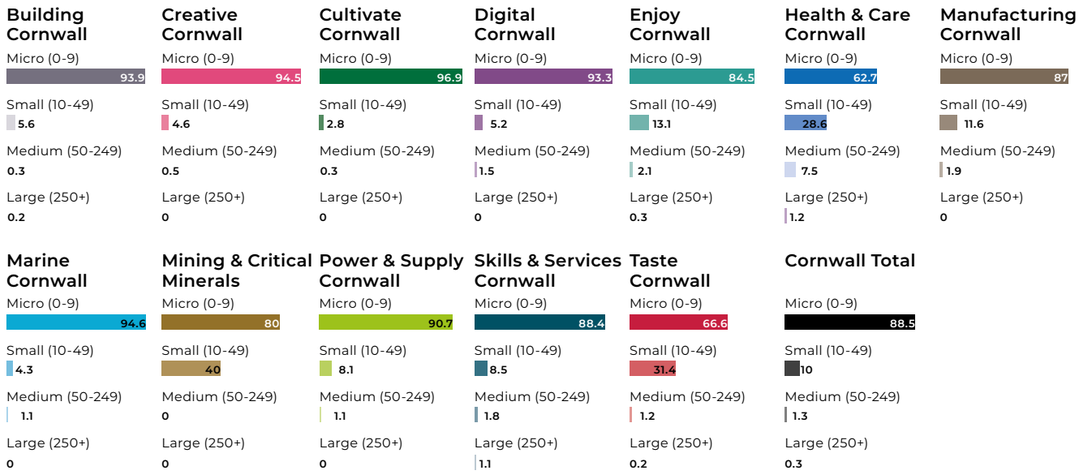
Figure 12A **Employment Size Band Local Units 2023**



Source: ONS UKBC

For enterprises the pattern is broadly the same.

Figure 12B **Employment Size Band Enterprises 2023**



Finally for Local units it is useful to review the legal status across the Clusters with a focus on private sector businesses (that is excluding public sector. Highlights include:

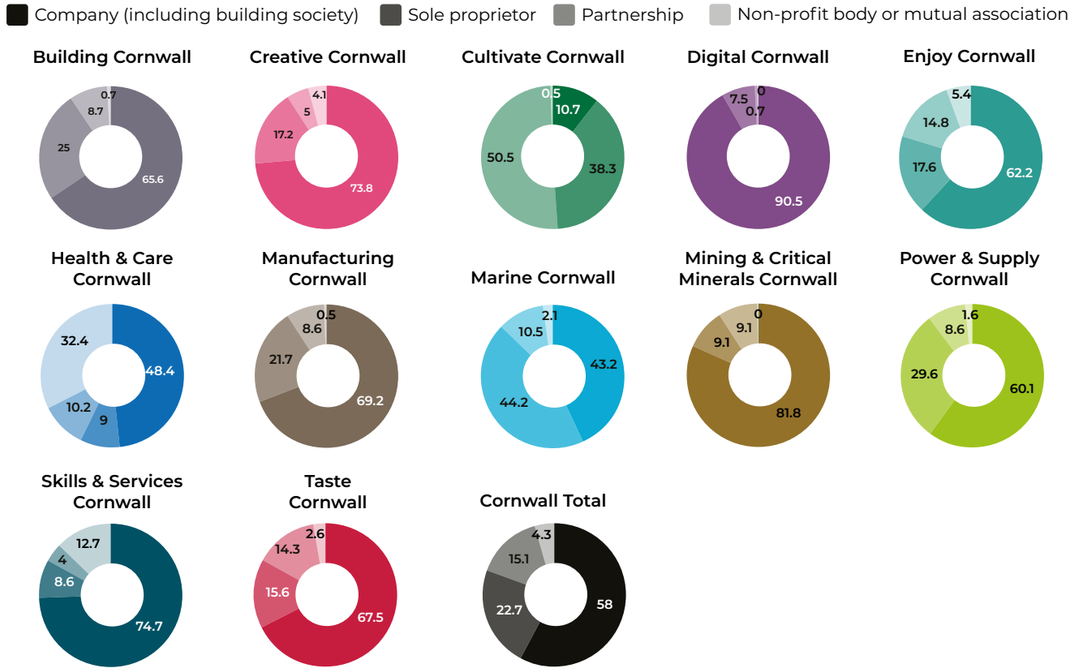
Health & Care Cornwall has the highest share of Non Profit or mutual associations at 32.4% followed by Skills & Services Cornwall at 12.7%.

The highest share of companies (including building societies) is found in the Digital Cornwall (90.5%).

The highest share of Sole proprietor is found in the Marine and Cultivate Cornwall Clusters.

The highest share of partnerships are found in the Cultivate Cornwall cluster.

Figure 13 **Private Sector – Local Units Legal Status 2023**



Source: ONS UKBC

3.3. GVA

ONS publish Gross Value Added (and the latest available data is for 2022) by 2 digit SIC code for Cornwall and the Isles of Scilly. The total GVA for 2022 was estimated at £13,852 M. (or £13.8Bn). The Isles of Scilly element of this amounts to around £80m. The whole figure (CIoS) has been applied to the clusters.

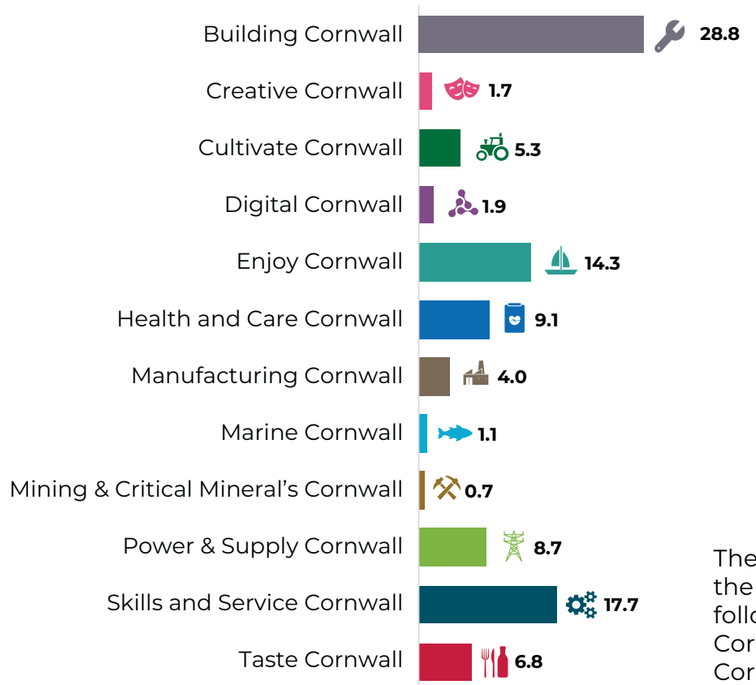
To convert the 2 digit SIC code data to the 5 digit detailed definitions used, an employment based apportionment has been used. Where 5 digit SIC codes have been allocated to different clusters then the employment share of these sub classes of activity have been used to apply a proportion of the 2 digit code GVA to different clusters.

Table 14 **GVA estimates 2022**

	2022 £ M
Building Cornwall	3,960
Creative Cornwall	230
Cultivate Cornwall	730
Digital Cornwall	260
Enjoy Cornwall	1,970
Health & Care Cornwall	1,260
Manufacturing Cornwall	550
Marine Cornwall	155
Mining & Critical Minerals Cornwall	90
Power & Supply Cornwall	1,195
Skills & Services Cornwall	2,435
Taste Cornwall	935
Cornwall total	**13.8Bn**

Source: ONS Regional GVA

Figure 15 **Share of GVA 2022**



The Building Cluster has the largest share of GVA followed by Skills & Services Cornwall and the Enjoy Cornwall Cluster.

Source: ONS Regional GVA

Table 16 **GVA Change over time 2015-22**

	2022 £ M
Building Cornwall	3,960
Creative Cornwall	230
Cultivate Cornwall	730
Digital Cornwall	260
Enjoy Cornwall	1,970
Health & Care Cornwall	1,260
Manufacturing Cornwall	550
Marine Cornwall	155
Mining & Critical Minerals Cornwall	90
Power & Supply Cornwall	1,195
Skills & Services Cornwall	2,435
Taste Cornwall	935
Cornwall total	**13.8Bn**

Source: ONS Regional GVA

The highest levels of GVA growth have been seen in the Digital and Enjoy Cornwall Clusters, where growth at 88.4% and 76.4.% respectively has been 1.9 and 1.7 higher than the Cornwall average growth.

Table 17 **GVA, Employment and Companies Change over time comparison – 2015-22**

	GVA	Employment	Companies (LU)
Building Cornwall	48.5	21.7	22.2
Creative Cornwall	67.5	0.0	15.8
Cultivate Cornwall	44.6	15.4	-7.3
Digital Cornwall	88.4	16.7	14.1
Enjoy Cornwall	76.4	8.3	3.2
Health & Care Cornwall	53.9	9.7	-7.9
Manufacturing Cornwall	28.8	11.1	13.3
Marine Cornwall	4.6	0.0	4.5
Mining & Critical Minerals Cornwall	37.9	-11.1	0.0
Power & Supply Cornwall	24.9	-3.6	18.2
Skills & Services Cornwall	33.1	2.6	4.0
Taste Cornwall	48.7	20.8	17.0
Cornwall total	**45.9**	**9.3**	**8.8**
England	**32**	**7.78**	**11.5**

Source: ONS Regional GVA

Cornwall as a whole has outperformed England for GVA and employment across this period.

3.4. Employment earnings

Earnings data is not available at industry level for Cornwall. There is national data by 2 digit Division SIC. We set out a low and high value for each cluster alongside important contextual employment size data (where we use Cornwall data for the amount of employment by division in each cluster).

Table 18 **UK wages 2023 £ Median Salary by 2 digit Division - Lowest Division salary by Cluster**

Division	Cluster	Low £	Employment 2022
Division 81: Services to buildings and landscape activities	Building Cornwall	21,128	3,430
Division 91: Libraries, archives, museums and other cultural activities	Creative Cornwall	27,306	900
Division 01: Crop and animal production, hunting and related service activities	Cultivate Cornwall	25,986	295
Division 26: Manufacture of computer, electronic and optical products	Digital Cornwall	36,962	300
Division 47: Retail trade, except of motor vehicles and motorcycles	Enjoy Cornwall	18,632	26,255
Division 88: Social work activities without accommodation	Health and Care Cornwall	20,929	6,650
Division 13: Manufacture of textiles	Manufacturing Cornwall	25,981	295
Division 52: Warehousing and support activities for transportation	Marine Cornwall	32,723	410
Division 80: Security and investigation activities	Power and Supply Cornwall	26,699	930
Division 78: Employment activities	Skills and Service Cornwall	20,783	5,895
Division 56: Food and beverage service activities	Taste Cornwall	13,648	24,200

Source: ONS ASHE

It is striking that for Taste Cornwall (Div 56 Food and Beverage service activities) the median salary is the lowest by some significant distance and associated with a high employment figure for the Division (within the Cluster within Cornwall).

The 2nd lowest salary is for Retail trade within the Enjoy Cornwall cluster and this has the largest employment size.

Table 19 **UK wages 2023 £ Median Salary by 2 digit Division – Highest Division salary by Cluster**

		High £	Employment 2022
Division 71: Architectural and engineering activities; technical testing and analysis	Building Cornwall	38,856	2,500
Division 70: Activities of head offices; management consultancy activities	Creative Cornwall	38,661	125
Division 74: Other professional, scientific and technical activities	Cultivate Cornwall	33,000	1,500
Division 62: Computer programming, consultancy and related activities	Digital Cornwall	44,100	1,315
Division 79: Travel agency, tour operator and other reservation service and related activities	Enjoy Cornwall	33,089	220
Division 86: Human health activities	Health and Care Cornwall	29,011	21,625
Division 30: Manufacture of other transport equipment	Manufacturing Cornwall [12]	45,705	135
Division 30: Manufacture of other transport equipment	Marine Cornwall	45,705	550
Division 35: Electricity, gas, steam and air conditioning supply	Power and Supply Cornwall	49,575	840
Division 64: Financial service activities, except insurance and pension funding	Skills and Service Cornwall	50,510	910
Division 11: Manufacture of beverages	Taste Cornwall	37,459	970

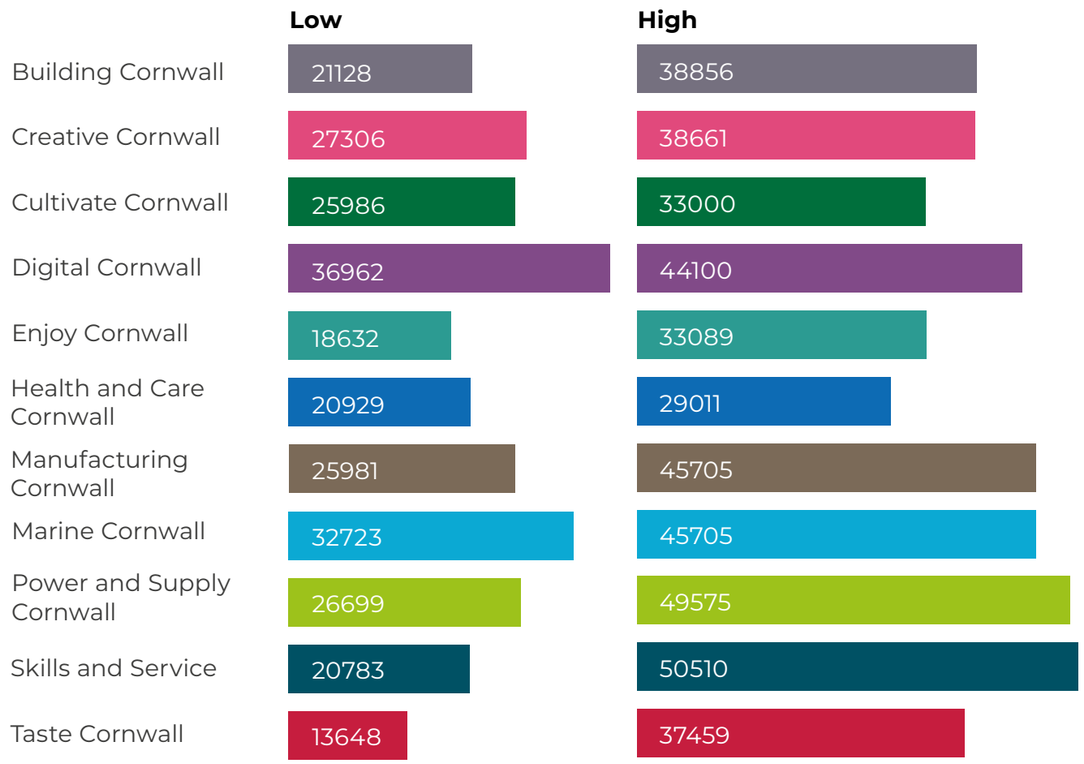
Source: ONS ASHE

Note there is only earnings data nationally for the combined Divisions that constitute Mining and Critical Minerals Cornwall. For 2023 this was an annual median salary of £38,589, and as such does not appear in the two tables above or the figure below.

The reverse is true to an extent – the very highest Division Salaries are found for Financial Services (within Skills and Services Cornwall) where the workforce in Cornwall is an estimated 910, and Division 35 (electricity gas etc) within Power and Supply Cornwall where the workforce in Cornwall is lower at 840.

The lowest "highest" value – for Human Health activities Division 86 in Health and Care Cornwall Cluster has the largest associated Cornwall workforce.

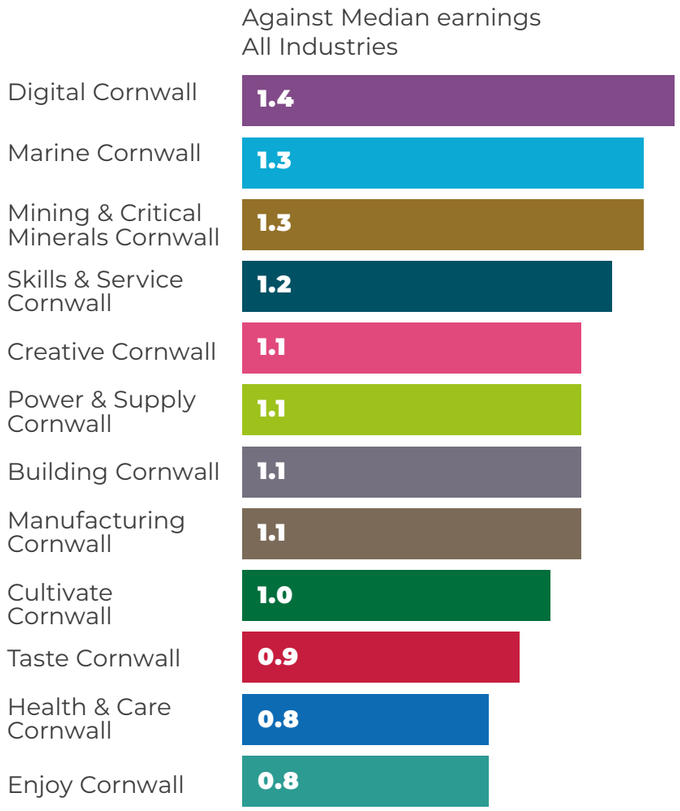
Figure 20 **UK Annual Salary 2023 - low and high by Cluster**



Source: ONS ASHE

In order to give some insight into comparative earnings within the Clusters, 2 digit SIC codes have been used to produce an average ratio against all industry median earnings for the UK. This highlights a probability of comparative earnings by cluster.

Figure 21 **Comparative earnings ratio Cluster against UK median calculated from ONS ASHE 2023**



Source: ONS ASHE

Low and high pay industries, as defined by the Low Pay Commission and set out by ONS have been matched to the top and bottom 3 Clusters from this list.

39.1 % of workers in Accommodation and Food are classed as low paid[13] by ONS – this correlates strongly with the Enjoy and Taste Cornwall clusters.

Over 40 % of workers in Information and communication (J) (43%) and Financial and insurance Services (K) (50%) are classed as high paid. Information & Communication (J) is predominantly within the Digital Cluster and Financial and Insurance services is within the Skills and Service Cluster.

3.5. Productivity

There is no available local data for productivity by industry breakdown. This section, similar to the earnings data sets out the range Output per hour £ in current prices sourced from ONS - The following figure shows the range of Output per hour (£) by Division by Cluster for the UK and uses an average from the available 3 quarters of 2021.

Table 22 **ONS Output per hour £ 2021 Highest Values by Cluster by Division**

Cluster	Division	Highest Output per hour £	2022 Employment 2022
Mining & Critical Minerals Cornwall	Division 06: Extraction of crude petroleum and natural gas	392.4	0
Building Cornwall	Division 68: Real estate activities	286.5	4325
Manufacturing Cornwall	Division 21: Manufacture of basic pharmaceutical products and pharmaceutical preparations	166	0
Marine Cornwall	Division 50: Water transport	165.9	225
Power and Supply Cornwall	Division 50: Water transport	165.9	0
Creative Cornwall	Division 60: Programming and broadcasting activities	160.6	90
Skills and Services Cornwall	Division 65: Insurance, reinsurance and pension funding, except compulsory social security	159.8	0
Enjoy Cornwall	Division 92: Gambling and betting activities	91	250
Digital Cornwall	Division 61: Telecommunications	81.3	1580
Cultivate Cornwall	Division 75: Veterinary	29.8	1500
Enjoy Cornwall	Division 92: Gambling and betting activities	91	250
Health and Care Cornwall	Division 86: Human health activities	35.5	21625

Source: ONS Labour productivity by Industry division

It is informative that 4 of the highest output values by Division have no actual recorded employment in the associated Cluster (although Division 50 has some employment in Marine) and the value for Cultivate (Division 75) and Health and Care (Division 86) are below the whole economy figure of £40.16 for 2022. Adjusting for divisions with no employment is set out in figure 21.

Table 23 **ONS Output per hour £ 2021 Highest Values by Cluster by Division (zero employment divisions replaced)**

Cluster	Division	Highest Output per hour £	Employment 2022
Building Cornwall	Division 68: Real estate activities	286.5	4,325
Marine Cornwall	Division 50: Water transport	165.9	225
Creative Cornwall	Division 60: Programming and broadcasting activities	160.6	90
Power and Supply Cornwall	Division 35: Electricity, gas, steam and air conditioning supply	129.6	840
Mining & Critical Minerals Cornwall	Division 08: Other mining and quarrying	121.5	805
Skills and Service Cornwall	Division 64: Financial service activities, except insurance and pension funding	102.7	910
Enjoy Cornwall	Division 92: Gambling and betting activities	91	250
Enjoy Cornwall	Division 92: Gambling and betting activities	91	250
Manufacturing Cornwall	Division 20: Manufacture of chemicals and chemical products	87.5	205
Digital Cornwall	Division 61: Telecommunications	81.3	1580
Health and Care Cornwall	Division 86: Human health activities	35.5	21,625
Cultivate Cornwall	Division 75: Vet	29.8	1500

Source: ONS Labour productivity by Industry division

Although the highest output per hour for Health & Care Cornwall is linked to a high employment figure it is an output value below the UK average of £40.16. Apart from Real estate activities (Division 68) in the Building Cornwall Cluster (which is skewed by the imputation of rent from the owner occupation of buildings) most other Clusters have high productivity values associated with relatively small employment numbers.

Table 24 **ONS Output per hour £ 2021 Lowest Values by Cluster by Division**

Cluster	Division	Highest Output	2022 Employment
Building	Division 81: Services to buildings and landscape activities	9.6	3,430
Creative Cornwall	Division 91: Libraries, archives, museums and other cultural activities	13.8	900
Cultivate Cornwall	Division 02: Forestry and logging	17.3	135
Digital Cornwall	Division 95: Repair of computers and personal and household goods	23.7	90
Enjoy Cornwall	Division 91: Libraries, archives, museums and other cultural activities	13.8	2,100
Health and Care Cornwall	Division 87: Residential care activities	17.2	7,150
Manufacturing Cornwall	Division 25: Manufacture of fabricated metal products, except machinery and equipment	35.2	1015
Marine Cornwall	Division 03: Fishing and aquaculture	17.3	270
Power and Supply Cornwall	Division 80: Security and investigation activities	12.1	930
Skills and Service Cornwall	Division 70: Activities of head offices; management consultancy activities	18.6	1,875
Taste Cornwall	Division 56: Food and beverage service activities	17.6	24,200

Source: ONS Labour productivity by Industry division

For the lowest output values by Cluster there is generally a higher associated employment level. All the lowest values with the exception of the Manufacturing output are considerably lower than the UK average, £40.16.

We have also considered the extent productivity has increased (or decreased) across the period 2011-2021.

We set out the highest and lowest changes below. The first draft of this analysis identified 6[14] out of 20 divisions where there was no Cornwall employment – this version presents the highest and lowest growth (an actual decline). The 2021 value and the employment figure (Cornwall based) for 2022 are set alongside this change for 2011-21 for context.

Table 25 **ONS Output per hour £ 2011-2021 Highest Increases in productivity**

Cluster	Division	2022 employment	2011-21Ch %	2021 Output £ ph
Enjoy Cornwall	Division 92: Gambling and betting activities	250	150.5	91.0
Manufacturing Cornwall	Division 13: Manufacture of textiles	295	142.5	53.0
Manufacturing Cornwall	Division 14: Manufacture of wearing apparel	35	142.5	53.0
Manufacturing Cornwall	Division 15: Manufacture of leather and related products	15	142.5	53.0
Skills and Service Cornwall	Division 66: Activities auxiliary to financial services and insurance activities	1210	86.1	61.3
Manufacturing Cornwall	Division 20: Manufacture of chemicals and chemical products	205	85.9	87.5
Enjoy Cornwall Cornwall	Division 96: Other personal service activities	3195	79.4	42.3
Power and Supply Cornwall	Division 80: Security and investigation activities	930	70.9	12.1
Power and Supply Cornwall	Division 53: Postal and courier activities	2300	67.3	32.3
Manufacturing Cornwall	Division 27: Manufacture of electrical equipment	120	63.9	39.0

The highest level of increase in hour are associated with smaller employment, but are grouped within the Manufacturing Cornwall Cluster – 5 of the ten highest increases being in this Cluster.

Table 26 **ONS Output per hour £ 2011-2021 Lowest (declining) Increases in productivity**

Cluster	Division	2022 employment	2011-21Ch %	2021 Output £ ph
Creative Cornwall	Division 70: Activities of head offices; management consultancy activities	125	-6.7	18.6
Skills and Service Cornwall	Division 70: Activities of head offices; management consultancy activities	1875	-6.7	18.6
Creative Cornwall	Division 59: Motion picture, video and television programme production, sound recording and music publishing activities	475	-7.6	32.7
Marine Cornwall	Division 52: Warehousing and support activities for transportation	410	-9.0	32.3
Power and Supply Cornwall	Division 52: Warehousing and support activities for transportation	1395	-9.0	32.3
Marine Cornwall	Division 50: Water transport	225	-10.2	165.9
Digital Cornwall	Division 63: Information service activities	125	-33.8	49.6
Mining & Critical Minerals Cornwall	Division 08: Other mining and quarrying	805	-36.6	121.5
Enjoy Cornwall	Division 79: Travel agency, tour operator and other reservation service and related activities	220	-40.6	23.4
Power & Supply Cornwall	Division 51: Air transport	205	-43.5	16.3

There is a more mixed picture for Divisions where productivity has actually fallen since 2011. These typically have lower employment too, and no one Cluster dominates this list.

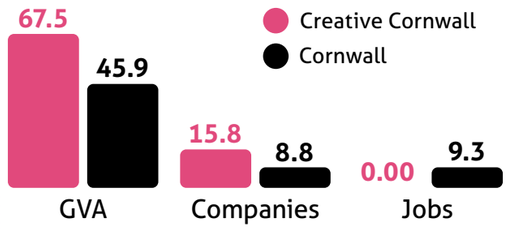
Creative Cornwall Enterprise Cluster

Growth

2015-2022 % changes

ONS BRES UKBC & GVA data

Higher performing than the wider Cornwall economy (2015-2022 % changes) for GVA and company change.



Employment

Cornwall has...

5,000 creative jobs

3,500 full time | **1,750** part time

2% of Cornwall's total employment (2022 - ONS BRES)

Output

GVA estimated at **£233m**

1.7% of Cornwall's total (2022-ONS Regional GVA)

Business

The cluster has...

1,100 local units — **3.7%** and **1,065 enterprises** — **4.2%** of Cornwall's total (2022-ONS UKBC)

Vacancies

The cluster had...

236 recorded vacancies Jan-July 2024

1.7% of Cornwall's total

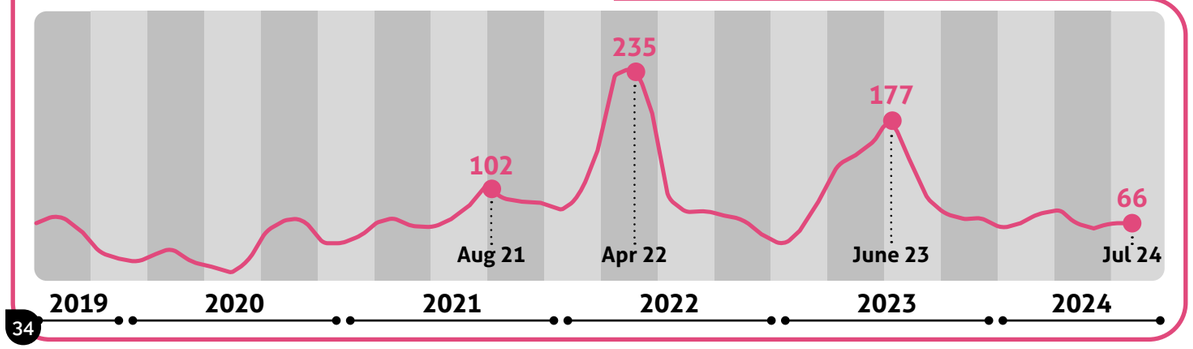
1,875 vacancies over the last 5 years

Median advertised salary:

£27,800 (2024)

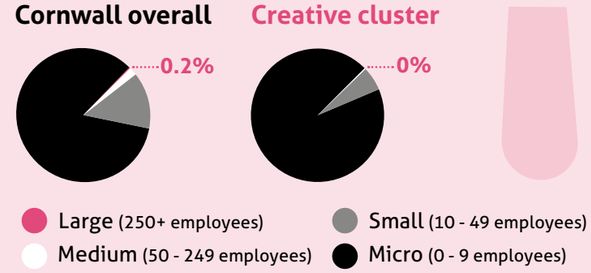
Salary range: £12,000 pa to £151,000 pa

Creative Vacancies 2019-2024

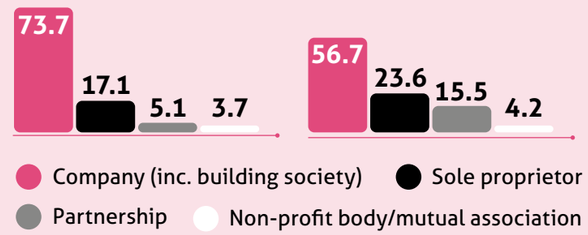


Company size band % share 2023 (ONS UKBC)

The cluster company structure has a smaller share of micro-businesses.



Company legal structure % share 2022 (ONS UKBC)



Employment Hotspots 2022

(ONS BRES)

Showing MSOAs where the level of employment in this cluster is over 2 times the Cornwall average.

Created in QGIS by Understanding Data using boundaries and data from ONS and a basemap from OS.

Cornwall's Creative Cluster is

97% private sector

It has a larger share of companies.

A total

3.7%

of Cornwall's creative businesses are non-profit or mutual associations

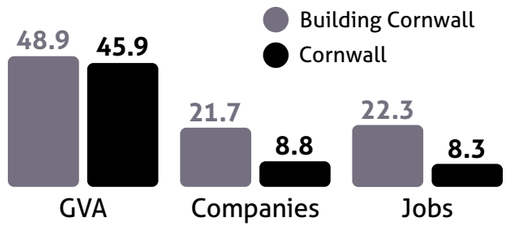
- below Cornwall's overall total 4.2%.

Building Cornwall Enterprise Cluster

Growth

2015-2022 % changes
ONS BRES UKBC & GVA data

Higher performing than the wider Cornwall economy (2015-22 % changes) for GVA, company change and jobs.



Median advertised salary:

£27,072 (2024)

Salary range: £10,000 pa to £75,000 pa

Top job titles (Jan -July 2024)

Cleaners • House cleaners • Labourers

Employment

Cornwall has...

28,000 building jobs

19,000 full time | **5,000** part time

11% of Cornwall's total employment (2022 - ONS BRES)

Vacancies

The cluster had...

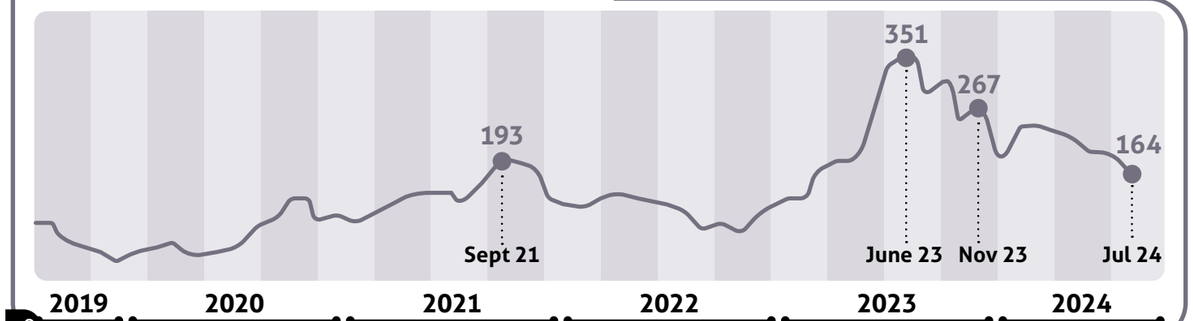
746 recorded vacancies

Jan-July 2024 |

5% of Cornwall's total

3,547 vacancies over the last 5 years

Building Vacancies 2019-2024



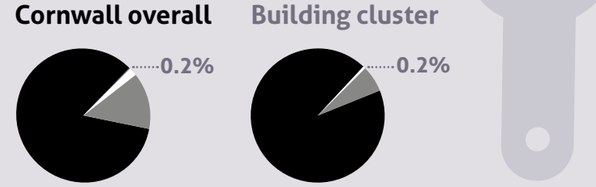
Output

GVA estimated at **£4bn**

29% of Cornwall's total (2022-ONS Regional GVA)

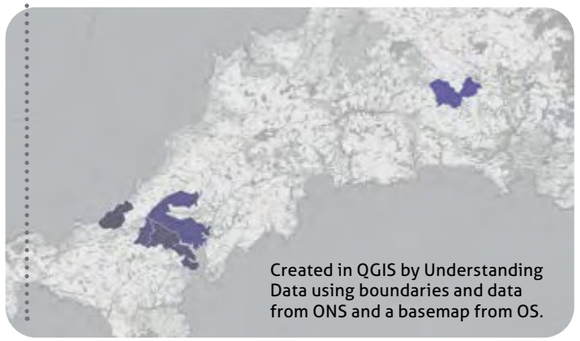
Company size band % share 2023 (ONS UKBC)

The cluster company structure has a smaller share of micro-businesses.



Employment Hotspots 2022
(ONS BRES)

Showing MSOAs where the level of employment in this cluster is over 2 times the Cornwall average.



Business

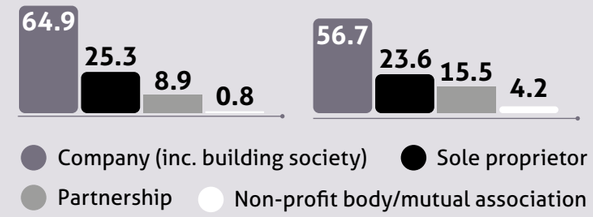
The cluster has...

6,180 local units

5,845 enterprises

21% and **23%** of Cornwall's total (2022-ONS UKBC)

Company legal structure % share 2022 (ONS UKBC)



Cornwall's Building Cluster is

100% private sector (enterprises)

99.8% private sector (local units)

Under **1%** of Cornwall's building businesses are non-profit or mutual associations

- below Cornwall's overall total 4.2%.

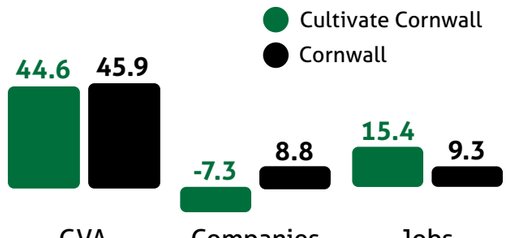
Cultivate Cornwall Enterprise Cluster

Growth

2015-2022 % changes

ONS BRES UKBC & GVA data

Higher performing than the wider Cornwall economy (2015-2022 % changes) for GVA and jobs.



Median advertised salary:

£24,960 (2024)

Salary range: £16,000 pa to £70,000 pa

Employment

Cornwall has...

15,000 cultivation jobs

4,500 full time | **1,500** part time

6.1% of Cornwall's total employment (2022 - ONS BRES)

Vacancies

The cluster had...

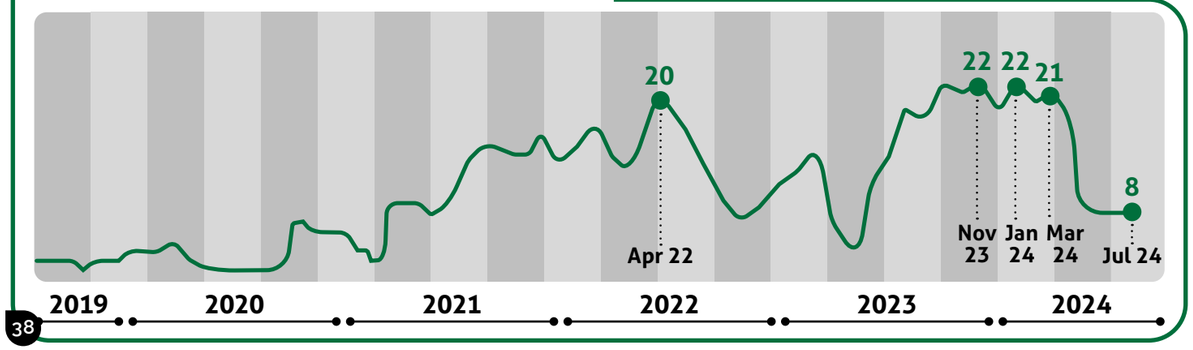
52 recorded vacancies

Jan-July 2024 |

0.4% of Cornwall's total

238 vacancies over the last 5 years

Cultivate Vacancies 2019-2024



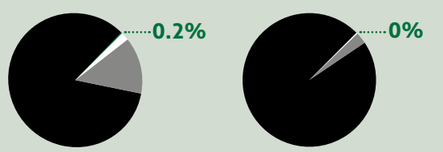
Output

GVA estimated at **£726m**

5.3% of Cornwall's total (2022-ONS Regional GVA)

Company size band % share 2023 (ONS UKBC)

The cluster company structure has a smaller share of micro-businesses.



Employment Hotspots 2022

(ONS BRES)

Because of the way total employment within the Cultivate Cornwall cluster is allocated only at the Cornwall level, it is not possible to show employment intensity at MSOA level.

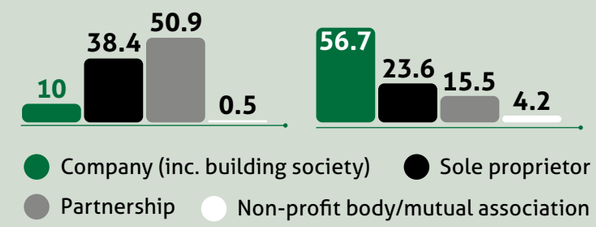
Business

The cluster has...

3,795 local units — **12.8%** and

1,065 enterprises — **4.2%** of Cornwall's total (2022-ONS UKBC)

Company legal structure % share 2022 (ONS UKBC)



Cornwall's Cultivate Cluster is

99.9% private sector

It has a larger share of private sector businesses registered as partnerships.

Under 1%

of Cornwall's cultivate businesses are non-profit or mutual associations

- below Cornwall's overall total 4.2%

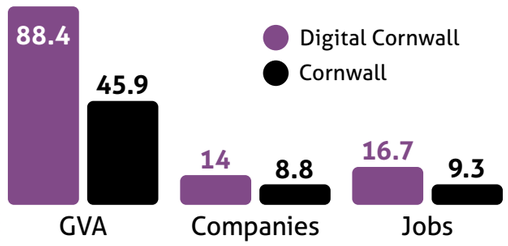
Digital Cornwall Enterprise Cluster

Growth

2015-2022 % changes

ONS BRES UKBC & GVA data

Higher performing than the wider Cornwall economy (2015-22 % changes) for GVA, company change and jobs.



Employment

Cornwall has...

3,500 digital jobs

3,000 full time | **400** part time

1.4% of Cornwall's total employment (2022 - ONS BRES)

Output

GVA estimated at **£259m**

1.9% of Cornwall's total (2022-ONS Regional GVA)

Business

The cluster has...

735 local units — **2.3%** and **680 enterprises** — **2.7%** of Cornwall's total (2022-ONS UKBC)

Vacancies

The cluster had...

188 recorded vacancies Jan-July 2024 |

1.3% of Cornwall's total

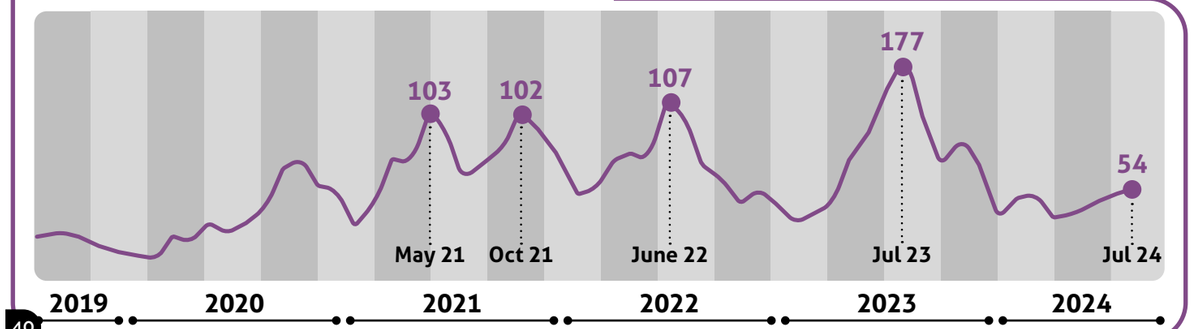
1,476 vacancies over the last 5 years

Median advertised salary:

£26,000 (2024)

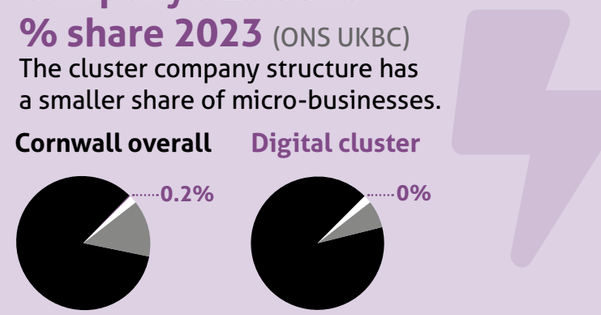
Salary range: £10,000 pa to £80,000 pa

Digital Vacancies 2019-2024

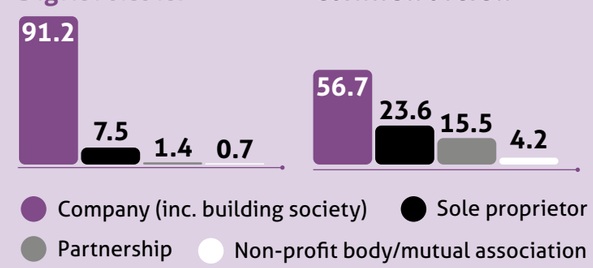


Company size band % share 2023 (ONS UKBC)

The cluster company structure has a smaller share of micro-businesses.



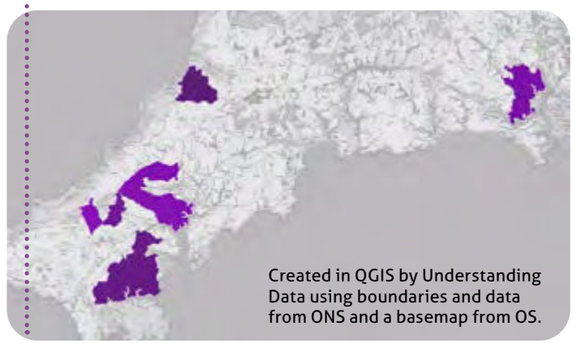
Company legal structure % share 2022 (ONS UKBC)



Employment Hotspots 2022

(ONS BRES)

Showing MSOAs where the level of employment in this cluster is over 2 times the Cornwall average.



Created in QGIS by Understanding Data using boundaries and data from ONS and a basemap from OS.

Cornwall's Digital Cluster is

100% private sector

It has a considerably larger share of private sector businesses that are registered as companies.

Under

1%

of Cornwall's digital businesses are non-profit or mutual associations

- below Cornwall's overall total 4.2%.

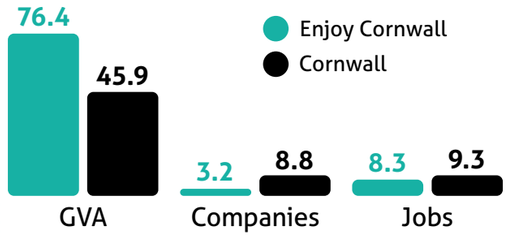
Enjoy Cornwall Enterprise Cluster

Growth

2015-2022 % changes

ONS BRES UKBC & GVA data

Higher performing than the wider Cornwall economy (2015-2022 % changes) for GVA.



Employment

Cornwall has...

5,000 enjoy jobs

3,500 full time | **1,750** part time

2% of Cornwall's total employment (2022 - ONS BRES)

Vacancies

The cluster had...

1,000 recorded vacancies

Jan-July 2024 |

7% of Cornwall's total

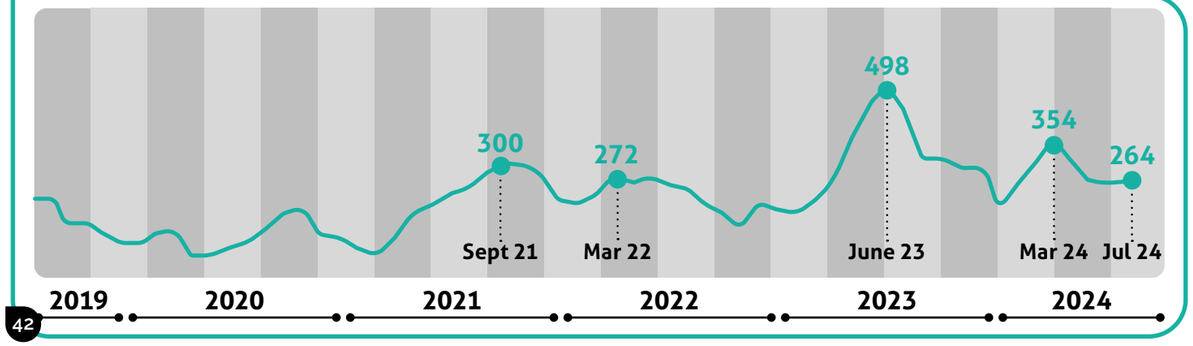
5,492 vacancies over the last 5 years

Median advertised salary:

£24,400 (2024)

Salary range: £10,000 pa to £155,000 pa

Enjoy Vacancies 2019-2024



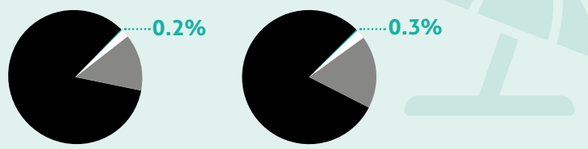
Output

GVA estimated at **£233m**

1.7% of Cornwall's total (2022-ONS Regional GVA)

Company size band % share 2023 (ONS UKBC)

The cluster company structure has a smaller share of micro-businesses.



Employment Hotspots 2022

(ONS BRES)

Showing MSOAs where the level of employment in this cluster is over 2 times the Cornwall average.

Created in QGIS by Understanding Data using boundaries and data from ONS and a basemap from OS.

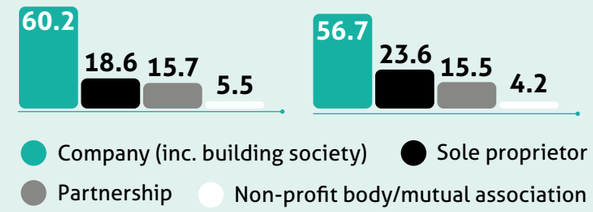
Business

The cluster has...

1,100 local units — **3.7%** and

1,065 enterprises — **4.2%** of Cornwall's total (2022-ONS UKBC)

Company legal structure % share 2022 (ONS UKBC)



Cornwall's Enjoy Cluster is

94.5% private sector

It has a larger share of private sector businesses that are registered as companies.

A total

5.5%

of Cornwall's enjoy businesses are non-profit or mutual associations

- above Cornwall's overall total 4.2%.

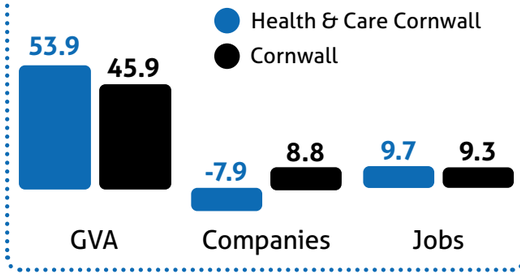
Health & Care Cornwall Enterprise Cluster

Growth

2015-2022 % changes

ONS BRES UKBC & GVA data

Higher performing than the wider Cornwall economy (2015-2022 % changes) for GVA and jobs.



Employment

Cornwall has...

34,000 health & care jobs

19,000 full time | **15,000** part time

13.8% of Cornwall's total employment (2022 - ONS BRES)

Vacancies

The cluster had...

2,036 recorded vacancies

Jan-July 2024 |

14.7% of Cornwall's total

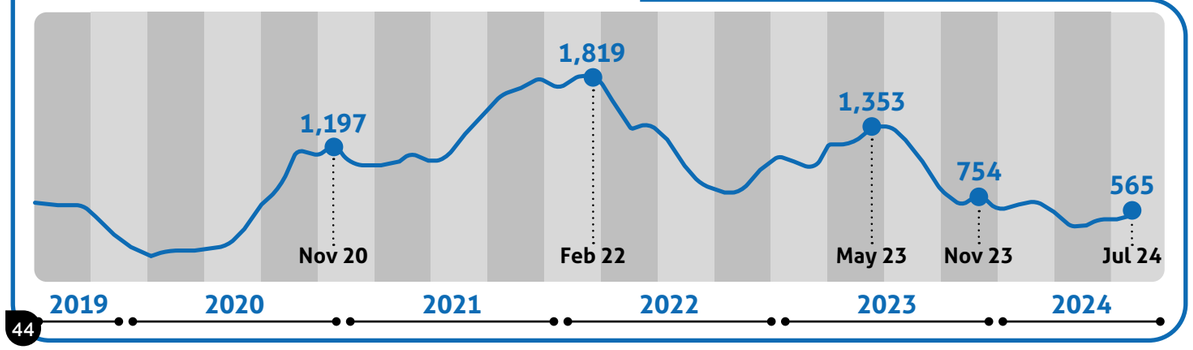
19,845 vacancies over the last 5 years

Median advertised salary:

£28,736 (2024)

Salary range: £10,000 pa to £132,000 pa

Health & Care Vacancies 2019-24



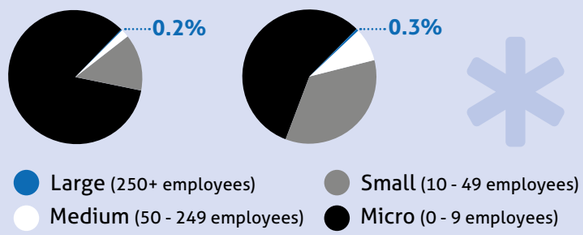
Output

GVA estimated at **£1.25bn**

9.1% of Cornwall's total (2022-ONS Regional GVA)

Company size band % share 2023 (ONS UKBC)

The cluster company structure has a smaller share of micro-businesses.



Employment Hotspots 2022

(ONS BRES)

Showing MSOAs where the level of employment in this cluster is over 2 times the Cornwall average.

Created in QGIS by Understanding Data using boundaries and data from ONS and a basemap from OS.

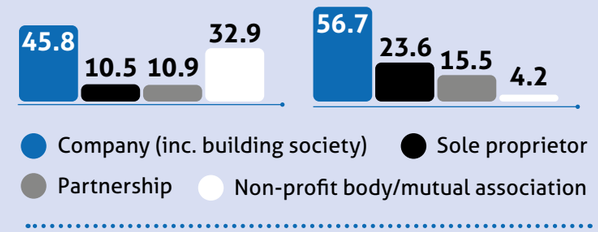
Business

The cluster has...

1,335 local units — **4.5%** and

795 enterprises — **3.1%** of Cornwall's total (2022-ONS UKBC)

Company legal structure % share 2022 (ONS UKBC)



Cornwall's Enjoy Cluster is

89.1% private sector

It has a larger share of private sector businesses that are registered as non profit or mutual associations

A total

32.8%

of Cornwall's health & care businesses are non-profit or mutual associations

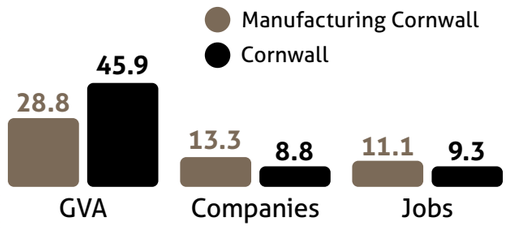
- over 7 times higher than Cornwall's overall total 4.2%.

Manufacturing Cornwall Enterprise Cluster

Growth

2015-2022 % changes
ONS BRES UKBC & GVA data

Lower performing than the wider Cornwall economy for GVA but showing higher growth in companies and jobs.



Median advertised salary:

£27,100 (2024)

Salary range: £10,000 pa to £88,000 pa

Employment

Cornwall has...

10,000 manufacturing jobs

9,000 full time | **900** part time

4% of Cornwall's total employment (2022 - ONS BRES)

Vacancies

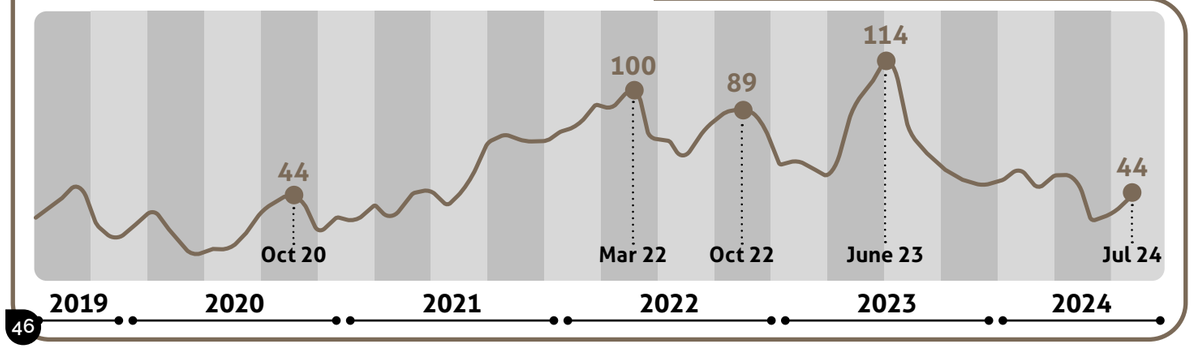
The cluster had...

181 recorded vacancies Jan-July 2024 |

1.3% of Cornwall's total

1,368 vacancies over the last 5 years

Manufacturing Vacancies 2019-24



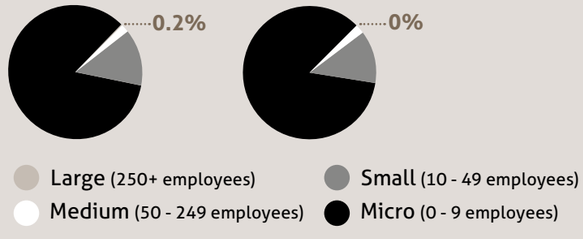
Output

GVA estimated at **£545m**

4% of Cornwall's total (2022-ONS Regional GVA)

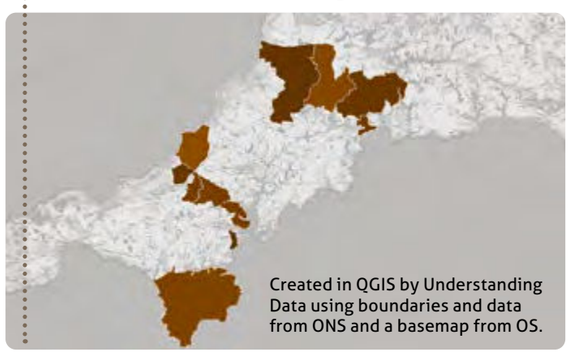
Company size band % share 2023 (ONS UKBC)

The cluster company structure has a smaller share of micro-businesses.



Employment Hotspots 2022
(ONS BRES)

Showing MSOAs where the level of employment in this cluster is over 2 times the Cornwall average.



Created in QGIS by Understanding Data using boundaries and data from ONS and a basemap from OS.

Business

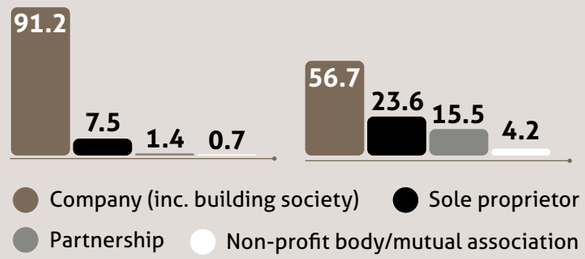
The cluster has...

1,105 local units — **3.7%**

and

1,035 enterprises — **4.1%** of Cornwall's total (2022-ONS UKBC)

Company legal structure % share 2022 (ONS UKBC)



Cornwall's Manufacturing Cluster is

100% private sector

It has a considerably larger share of private sector businesses that are registered as companies.

It has

0

businesses registered as non-profit or mutual associations

- well below Cornwall's overall total 4.2%.

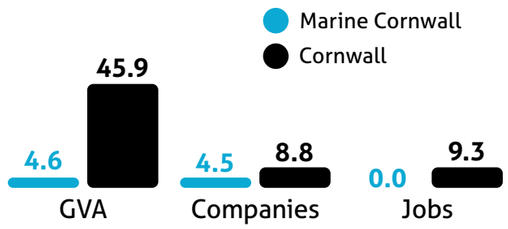
Marine Cornwall Enterprise Cluster

Growth

2015-2022 % changes

ONS BRES UKBC & GVA data

Lower performing than the wider Cornwall economy (2015-2022 % changes).



Median advertised salary:

£31,168 (2024)

Salary range: £12,000 pa to £70,000 pa

Employment

Cornwall has...

5,000 marine jobs

3,500 full time | **1,750** part time

2% of Cornwall's total employment (2022 - ONS BRES)

Vacancies

The cluster had...

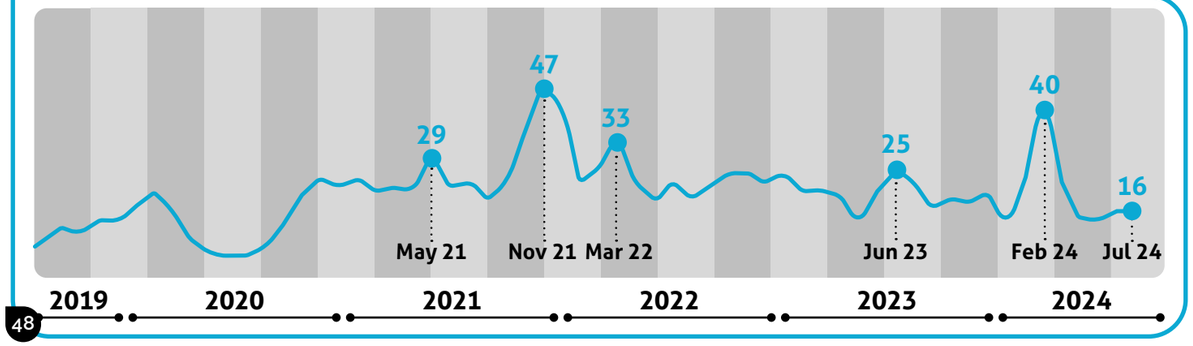
80 recorded vacancies

Jan-July 2024 |

0.6% of Cornwall's total

506 vacancies over the last 5 years

Marine Vacancies 2019-2024



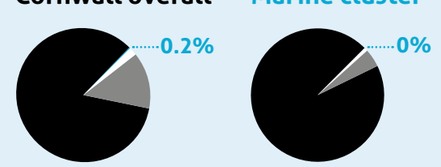
Output

GVA estimated at **£233m**

1.7% of Cornwall's total (2022-ONS Regional GVA)

Company size band % share 2023 (ONS UKBC)

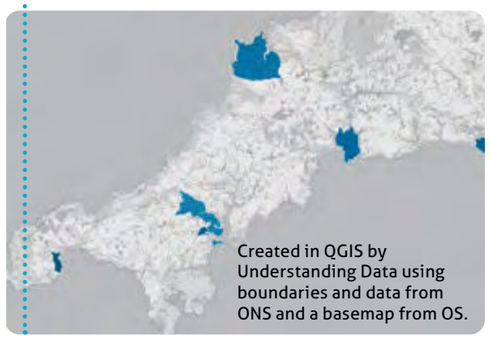
The cluster company structure has a smaller share of micro-businesses.



Employment Hotspots 2022

(ONS BRES)

Showing MSOAs where the level of employment in this cluster is over 2 times the Cornwall average.



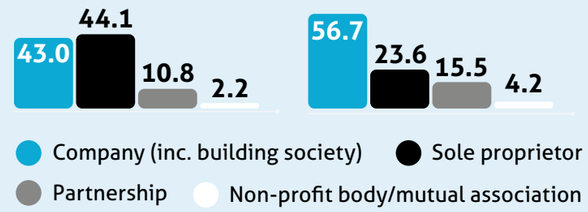
Business

The cluster has...

1,100 local units — **3.7%** and

1,065 enterprises — **4.2%** of Cornwall's total (2022-ONS UKBC)

Company legal structure % share 2022 (ONS UKBC)



Cornwall's Marine Cluster is

100% private sector

It has a much larger share of private sector businesses that are registered as sole trader.

A total

2%

of Cornwall's marine businesses are non-profit or mutual associations

- below Cornwall's overall total 4.2%.

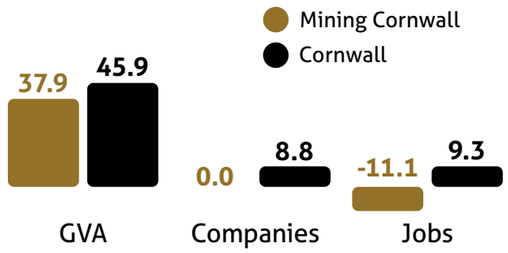
Mining & Critical Minerals Cornwall Enterprise Cluster

Growth

2015-2022 % changes

ONS BRES UKBC & GVA data

Lower performing than the wider Cornwall economy for GVA, company change and a decline in employment.



Employment

Cornwall has...

800 mining jobs

800 full time | **0** part time

0.3% of Cornwall's total employment (2022 - ONS BRES)

Vacancies

The cluster had...

32 recorded vacancies Jan-July 2024 |

0.2% of Cornwall's total

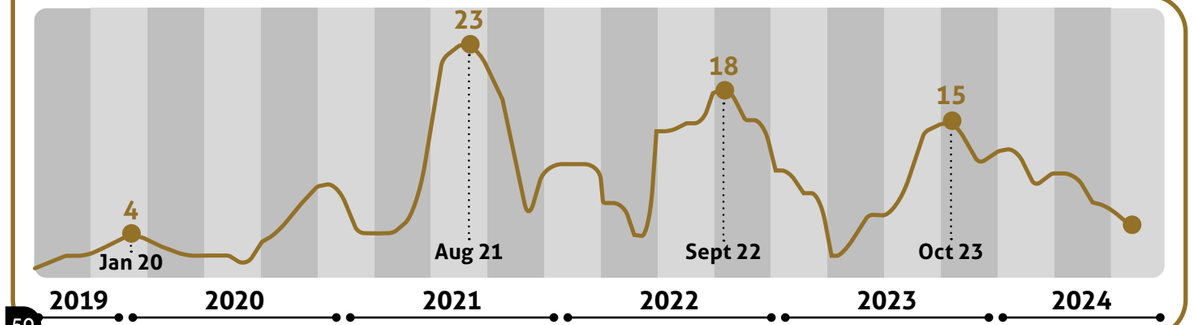
? vacancies over the last 5 years

Median advertised salary:

£32,100 (2024)

Salary range: £12,000 pa to £60,000 pa

Mining Vacancies 2019-2024



Output

GVA estimated at **£91m**

0.7% of Cornwall's total (2022-ONS Regional GVA)

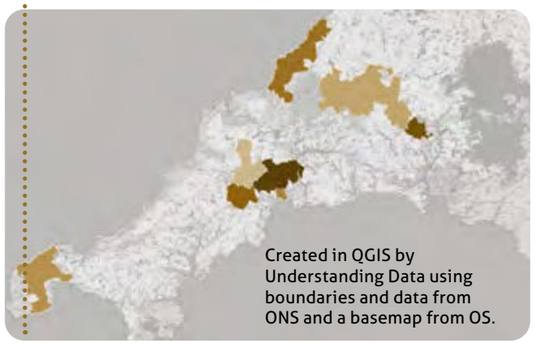
Company size band % share 2023 (ONS UKBC)

The cluster company structure has a smaller share of micro-businesses.

Employment Hotspots 2022

(ONS BRES)

Showing MSOAs where the level of employment in this cluster is over 2 times the Cornwall average. *Note low overall numbers.*



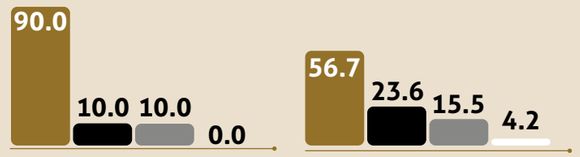
Business

The cluster has...

50 local units — **0.2%** and

25 enterprises — **0.1%** of Cornwall's total (2022-ONS UKBC)

Company legal structure % share 2022 (ONS UKBC)



Cornwall's Mining Cluster is

100% private sector

It has a considerably larger share of private sector businesses that are registered as companies.

It has

0

businesses registered as non-profit or mutual associations

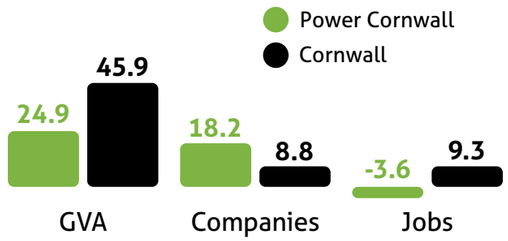
- well below Cornwall's overall total 4.2%.

Power & Supply Cornwall Enterprise Cluster

Growth

2015-2022 % changes
ONS BRES UKBC & GVA data

Lower performing than the wider Cornwall economy for GVA and jobs, but higher business change.



Employment

Cornwall has...

27,000 power jobs

20,000 full time | **5,000** part time

of Cornwall's total employment
(2022 - ONS BRES)

Output

GVA estimated at **£1.2bn**

8.7% of Cornwall's total
(2022-ONS Regional GVA)

Business

The cluster has...

4,420 local units — **14.9%** and

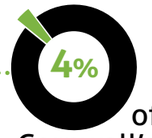
3,865 enterprises — **15.2%** of Cornwall's total

(2022-ONS UKBC)

Vacancies

The cluster had...

561 recorded vacancies
Jan-July 2024 |



of Cornwall's total

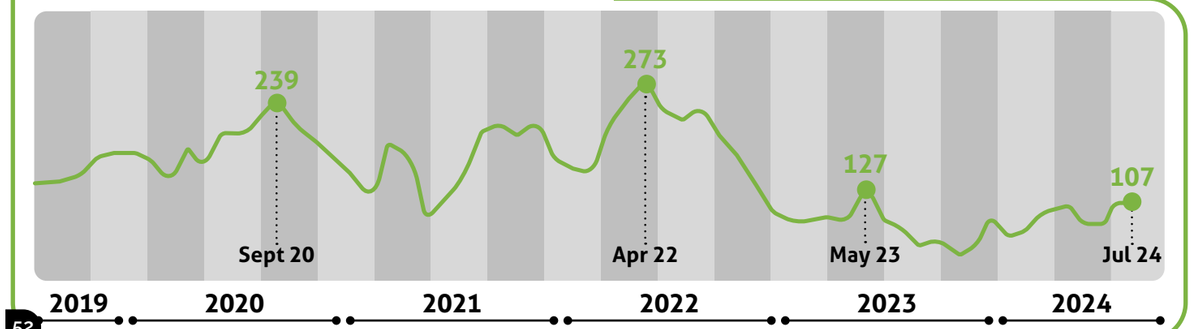
3,500 vacancies over the last 5 years

Median advertised salary:

£26,000 (2024)

Salary range: £10,000 pa to £80,000 pa

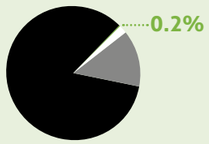
Power Vacancies 2019-2024



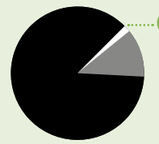
Company size band % share 2023 (ONS UKBC)

The cluster company structure has a smaller share of micro-businesses.

Cornwall overall



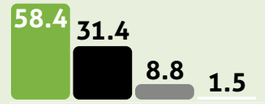
Power cluster



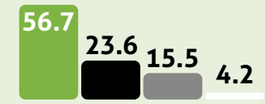
Large (250+ employees)
Medium (50 - 249 employees)
Small (10 - 49 employees)
Micro (0 - 9 employees)

Company legal structure % share 2022 (ONS UKBC)

Power cluster



Cornwall overall

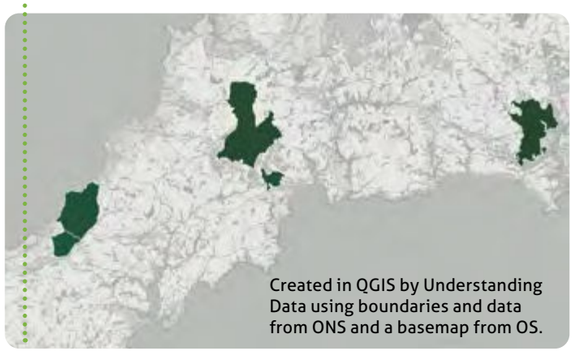


Company (inc. building society)
Sole proprietor
Partnership
Non-profit body/mutual association

Employment Hotspots 2022

(ONS BRES)

Showing MSOAs where the level of employment in this cluster is over 2 times the Cornwall average.



Cornwall's Power & Supply Cluster is

99.4% private sector

It has a considerably larger share of private sector businesses that are registered as companies.

Under

1.5%

of Cornwall's power & supply businesses are non-profit or mutual associations

- below Cornwall's overall total 4.2%.

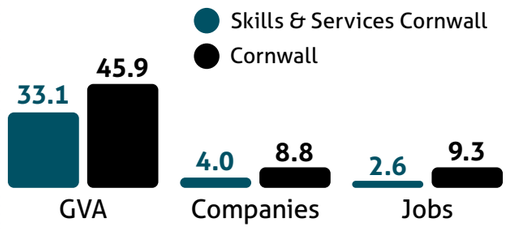
Skills & Services Cornwall Enterprise Cluster

Growth

2015-2022 % changes

ONS BRES UKBC & GVA data

Lower performing than the wider Cornwall economy (2015-22 % changes) for GVA, company change and jobs.

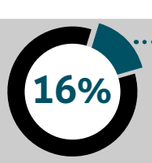


Employment

Cornwall has...

40,000 skills jobs

24,000 full time | **16,000** part time



of Cornwall's total employment

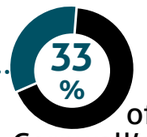
(2022 - ONS BRES)

Vacancies

The cluster had...

4,600 recorded vacancies

Jan-July 2024 |



of Cornwall's total

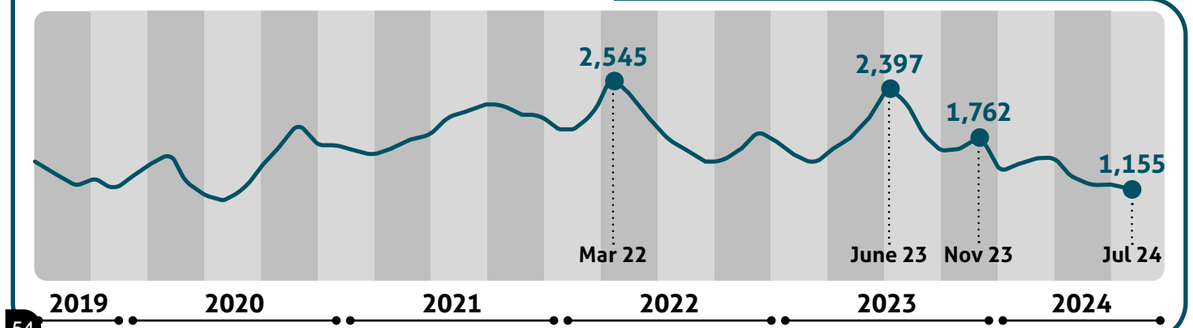
38,711 vacancies over the last 5 years

Median advertised salary:

£31,000 (2024)

Salary range: £10,000 pa to £150,000 pa

Skills Vacancies 2019-2024



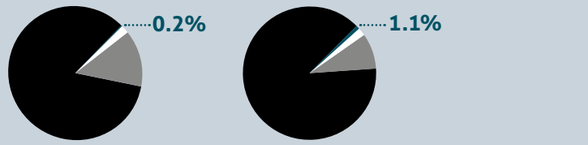
Output

GVA estimated at **£2.4bn**

17.7% of Cornwall's total (2022-ONS Regional GVA)

Company size band % share 2023 (ONS UKBC)

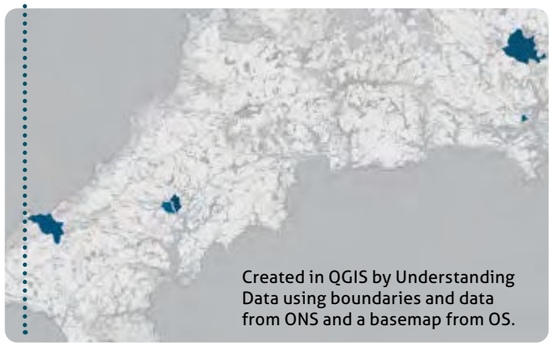
The cluster company structure has a smaller share of micro-businesses.



Employment Hotspots 2022

(ONS BRES)

Showing MSOAs where the level of employment in this cluster is over 2 times the Cornwall average.



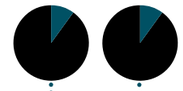
Created in QGIS by Understanding Data using boundaries and data from ONS and a basemap from OS.

Business

The cluster has...

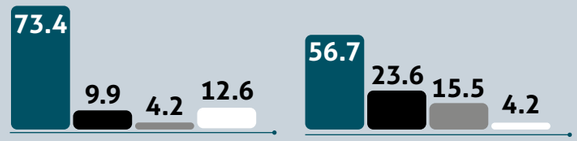
2,975 local units

2,280 enterprises



of Cornwall's total (2022-ONS UKBC)

Company legal structure % share 2022 (ONS UKBC)



Cornwall's Skills Cluster is

80.1% private sector

It has a larger share of private sector businesses that are registered as companies.

A total

12.6%

of Cornwall's skills businesses are non-profit or mutual associations

- 3 times more than Cornwall's 4.2% average.

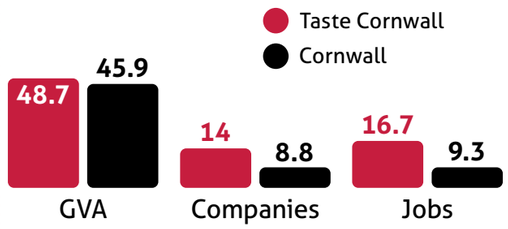
Taste Cornwall Enterprise Cluster

Growth

2015-2022 % changes

ONS BRES UKBC & GVA data

Higher performing than the wider Cornwall economy (2015-22 % changes) for GVA, company change and jobs.



Employment

Cornwall has...

29,000 taste jobs

13,000 full time | **15,000** part time

11.7% of Cornwall's total employment (2022 - ONS BRES)

Vacancies

The cluster had...

482 recorded vacancies

Jan-July 2024 |

3.5% of Cornwall's total

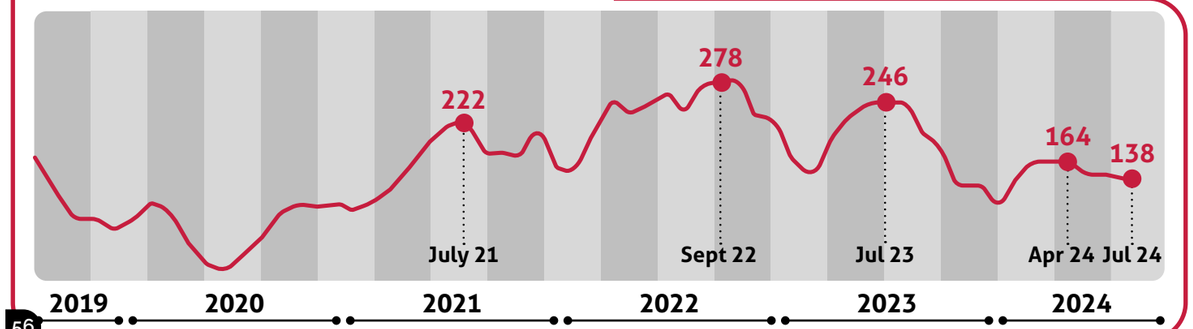
3,828 vacancies over the last 5 years

Median advertised salary:

£25,000 (2024)

Salary range: £13,000 pa to £83,000 pa

Taste Vacancies 2019-2024



Output

GVA estimated at **£934m**

6.7% of Cornwall's total (2022-ONS Regional GVA)

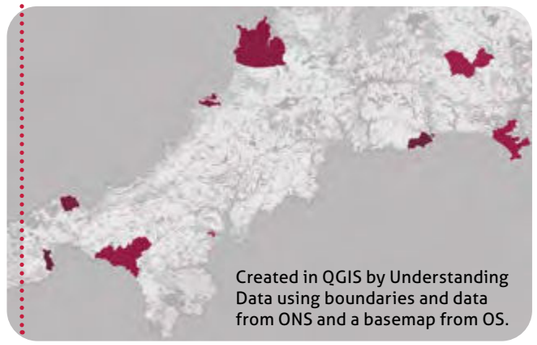
Company size band % share 2023 (ONS UKBC)

The cluster company structure has a smaller share of micro-businesses.

Employment Hotspots 2022

(ONS BRES)

Showing MSOAs where the level of employment in this cluster is over 2 times the Cornwall average.



Created in QGIS by Understanding Data using boundaries and data from ONS and a basemap from OS.

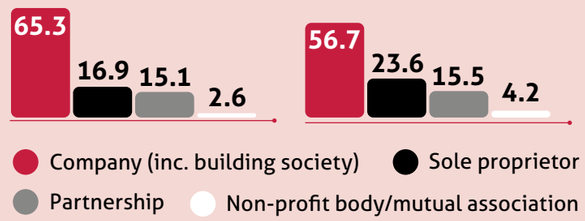
Business

The cluster has...

2,100 local units — **8.4%** and

2,010 enterprises — **7.9%** of Cornwall's total (2022-ONS UKBC)

Company legal structure % share 2022 (ONS UKBC)



Cornwall's Taste Cluster is

100% private sector

It has a considerably larger share of private sector businesses that are registered as companies.

A total of

2.6%

of Cornwall's taste businesses are non-profit or mutual associations

- below Cornwall's overall total 4.2%.

Footnotes

1 https://onsdigital.github.io/dp-classification-tools/standard-industrial-classification/ONS_SIC_hierarchy_view.html Broad Industrial Groups

2 For broad industrial groups the following aggregations occur: Mining, quarrying & utilities (B,D and E) are combined, Arts, entertainment, recreation & other services (R,S,T and U) are combined and G : Wholesale and retail trade; repair of motor vehicles and motorcycles is split into 5 : Motor trades (Part G), 6 : Wholesale (Part G) and 7 : Retail (Part G)

3 UK Business Counts (UKBC) and Business register and employment Survey (BRES) publish data at a range of geographies from Section to 5 Digit SIC Code.

4 However both BRES (employment) and UKBC (company data) by ONS are subject to rounding and this has an impact on estimates for low values.

5 ONS publish the Annual Survey of Hours and Earnings (ASHE) at a range of geographies and for FT and PT work, Male female and total workforce. However Industry data at 2 Digit Sic code is only available for countries and regions. We have used England data in this analysis.

6 Productivity data is published by Ons Labour Productivity by industry division We have used UK data for Output per hour in current prices.

7 **Employees:** An employee is anyone aged 16 years or over that an organisation directly pays from its payroll(s), in return for carrying out a full-time or part-time job or being on a training scheme. It excludes voluntary workers, self-employed, working owners who are not paid via PAYE.

Full-time employees: those working more than 30 hours per week.

Part-time employees: those working 30 hours or less per week.

Employment includes employees plus the number of working owners. BRES therefore includes self-employed workers as long as they are registered for VAT or Pay-As-You-Earn (PAYE) schemes. Self employed people not registered for these, along with HM Forces and Government Supported trainees are excluded. Working owners are typically sole traders, sole proprietors or partners who receive drawings or a share of the profits.

8 Total jobs is a workplace-based measure of jobs and comprises:

- employees (from the Business Register and Employment Survey),
- self-employment jobs (from the Annual Population Survey),
- government-supported trainees (from DfES and DWP) and
- HM Forces (from MoD).

9 Caution is needed when interpreting data around Mining and critical Minerals due to the small numbers and the way BRES applies rounding.

10 A **local unit** is an individual site (for example a factory or shop) associated with an enterprise. It can also be referred to as a workplace.

11 An **enterprise** can be thought of as the overall business, made up of all the individual sites or workplaces. It is defined as the smallest combination of legal units (generally based on VAT and/or PAYE records) that has a certain degree of autonomy within an enterprise group.

12 As previously explained Division 30 appears under both Manufacturing and Marine clusters. This overlap is deemed reasonable.

13 Low pay is defined as the value that is two-thirds of median hourly earnings and high pay is defined as the value that is 1.5 times median hourly earnings.

14 4 of the 6 divisions where productivity declined were within the Mining and Critical Minerals Cluster – where these individual divisions were grouped together under a single value.

Cornwall Chamber of Commerce

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