



## Cornwall County Council & Cornwall and Isles of Scilly Economic Forum

### CORNWALL AND ISLES OF SCILLY SECTOR PROFILE:

# TOURISM

December 2008

This research has been undertaken to update the previous sector profiles that had been requested by Cornwall Enterprise to stimulate a better understanding of their 10 priority sectors. This work will provide additional detail to underpin *Strategy and Action* in order to help to inform future decisions on the kind of support that is provided for local businesses and economic development projects.

*“Cornwall remains one of the UK’s favourite holiday destinations. While overseas markets are relatively small (5%) the County continues to perform well in the domestic market and loyalty amongst visitors to the County is extremely high indicating high levels of customer satisfaction (90% of visitors are on a repeat visit). Reducing seasonality continues to be a prime focus of the public sector and encouragingly the last ten years have seen a significant improvement in occupancy rates during the shoulder months. With growth in tourism being dominated by the short break market investment in key attractions such as the Eden Project (which is still cited by 30% of visitors as being a key part of their visit), the National Maritime Museum Cornwall and the Tate St Ives, has meant that Cornwall can perform more effectively in this key market.*

*Transport links continue to cause both visitors and the industry concern. While huge improvements have been made in terms of the airport and the dualling of the A30 at Goss Moor, public transport is still perceived to be very poor and the east of the County now bears the brunt of the Saturday bottlenecks which are now a regular feature on the A30 in the Temple area. Recruitment and retention of staff is another major challenge for the industry. While wage rates are slowly improving and in recent years migrant workers from Eastern Europe have helped fill the gaps left by the local workforce, this will inevitably change as it becomes more economically viable for these migrant workers to return home.*

*In the short term the industry could benefit from the current economic climate with UK holidaymakers choosing a domestic holiday rather than an overseas one. However, the huge increases in fuel costs could easily negate any benefit as holidaymakers choose to stay nearer home. In summary the industry faces a number of challenges which for many businesses means that it will be difficult to plan ahead”.*

Teresa Timms, Visit Cornwall.

### *The Sector*

- The tourism sector covers those enterprises engaged in the provision of tourism services – hotels and restaurants, air and land transport and supporting activities, fairs/amusement parks, museums, gardens, and gambling and betting.
- Determining the contribution made by tourism to the economy is problematical. Not all of the activity or employment within certain sub-sectors can be attributed to tourism - *It is difficult to measure the exact number of jobs that are either directly or indirectly dependent on tourism. While the business generated by tourists is crucial to many hotels, restaurants, travel services and entertainment facilities, it does not*

account for all the business of these sectors and in some regions of the country it will make up very little of the activity. (House of Commons, 2000).

- For this reason data is presented using a narrow definition of tourism (excluding the non-tourist element within a sub-sector), and a broad definition (including all GVA and employment within the sub-sectors which make up this sector). The narrow definition includes a proportion of the retail sector.

Data from South West Tourism suggests that the total spend by tourists in Cornwall equals £1,621 million, with 34,000 directly employed with a further 8,500 indirectly employed. If induced employment is included this gives a total of 48,400 equal to 21% of total employment. South West Tourism, (2008), The Value of Tourism 2006 Cornwall)

## Headline facts

- Using the narrow definition, the tourism sector employs 25,200. This equals 13% of all employees in Cornwall.
- The broader definition indicates a total of 31,500. This equals 16.3% of total employment.
- In line with the situation across Great Britain, employment has increased in both absolute and relative terms.
- In line with employment trends, the number of business units in the tourism sector has increased, the percentage increase is above the rates for the SW and GB.
- In 2006 the overall GVA for the sector, using the narrow definition was £731million, equal to 10.6% of total GVA.
- In 2006 the overall GVA for the sector, using the broad definition was £896 million, equal to 13% of total GVA.
- Earnings at the sector level are only available at a UK level (median gross weekly for all employees). Employee earnings levels in the hotel and restaurants sub-sector in the UK are half the average (median) figure (£199), though above average in the transport sector. [The median figure for all employees equals £375].
- The Eden Project tops the list of attractions in Cornwall with 1,152,332 visitors, placing it ninth amongst major paid attractions across England.
- It is estimated that 11% of the retail sector is tourist related. This indicates that there are 2,700 employed in retail and that in 2006 of the £709 million GVA attributed to the retail sector, £78 million was tourist related.

## Overview

- Holiday spending by UK residents is primarily affected by: Growth in personal disposable income; Changes in holiday and leisure time; Competition from alternative leisure spending opportunities. (The Tourism Company, 2003).
- Tourism is the world's largest industry and so is of vital importance to the global economy. Its contribution has risen dramatically over recent decades.* (House of Commons, 2000).

- Tourism is linked with other sectors of the economy particularly food, retail and leisure. It also plays a role in farm diversification.
- While it already plays an important role in expenditure and employment terms, historically it is an under-performer when compared with other sectors. With analysts predicting that visitor numbers are set to grow over the coming decade, it all means that tourism has the potential to deliver significant economic benefits in the future if the right approach is adopted now. (South West Tourism, SWRDA, 2005).
- Cornwall is seen as a market leader and a pioneer of modern tourism built on its distinctive environment and mild climate even though it is evident that tourism in Cornwall still remains generally more seasonal when compared with the regional and national picture. (Cornwall Tourism Forum, 2004).
- Cornwall's economy has suffered because, although tourism makes a major contribution to GDP, pay in the sector is low compared to national average pay rates. Career opportunities are limited and jobs are perceived as being of a seasonal nature. (Cornwall Tourism Forum, 2004).
- Tourism is however recognised as one of Cornwall's most valuable industries which has supported improvements in infrastructure in Cornwall over the last few decades and has done much to improve the economy of the county.* (Cornwall County Council, 2004).

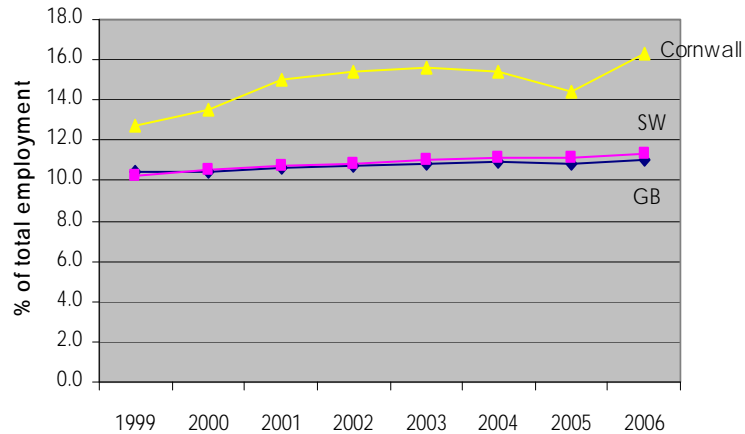
## Employment

- There are 25,200 jobs in the tourism sector in Cornwall according to the narrow definition. The main categories within the sector are hotels 5,500, restaurants 4,500, bars 3,200 and retail 2,700.
- According to the broad definition there are 31,500 jobs. The main categories within the sector are hotels 6,900, bars 6,500 and restaurants 5,900.
- Using the broad definition, between 1999 and 2006 employment in the tourism sector in Cornwall increased by 66%, compared to increases of 23% and 11% across the SW and GB.
- Of the additional 12,600 jobs, 31% were full-time male and female part-time 29.5%.
- Full time jobs now account for 50% of the total employment in the sector in Cornwall, lower than both the SW (54%) and GB (59%) figures.
- As fig. 1 shows, there has been an increase in employment in relative terms. Compared to 1999, as a proportion of total employment, the percentage in Cornwall has increased by 29%. Figures for the SW and GB were 11% and 5% respectively.
- Table 1 shows that in 2006 employment in tourism in Cornwall was nearly 50% more significant than across GB.

	Cornwall	SW	GB
Tourism	16.3	11.3	11.0

Table 1

**Fig. 1 Tourism employment as a % of total**



Source: Annual Business Inquiry, NOMIS

Year

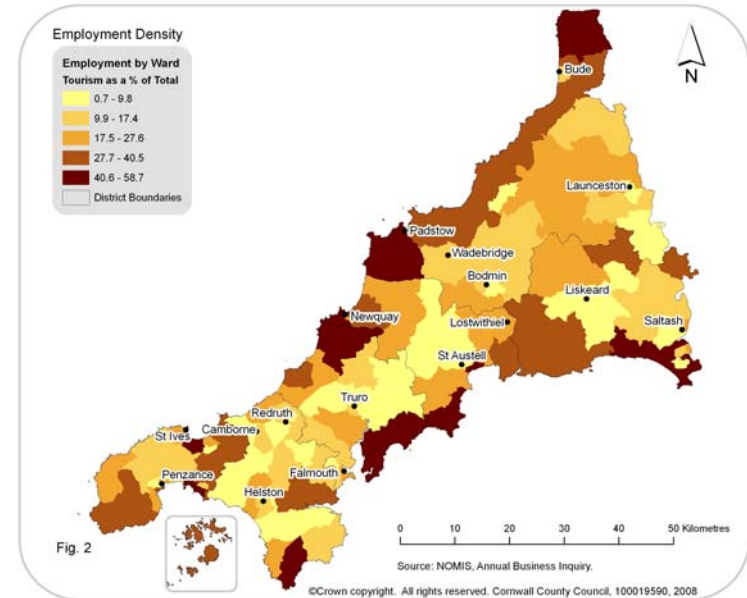
### Business Units (Broad)

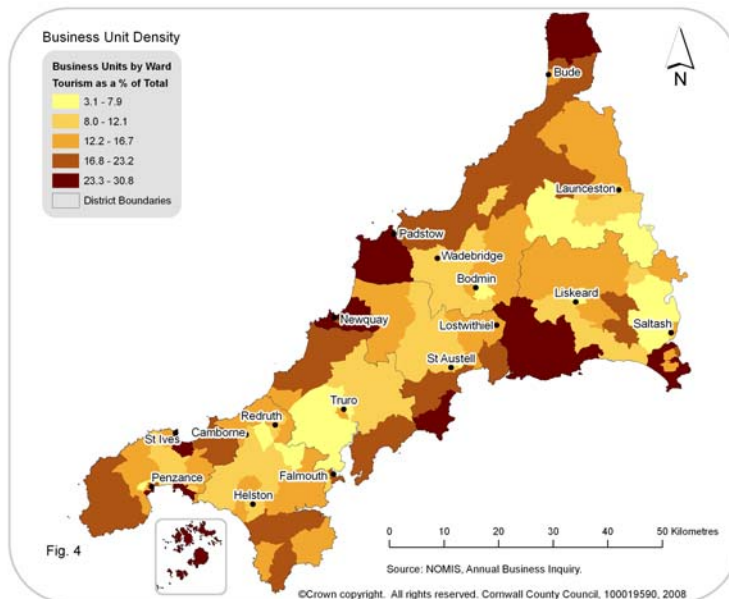
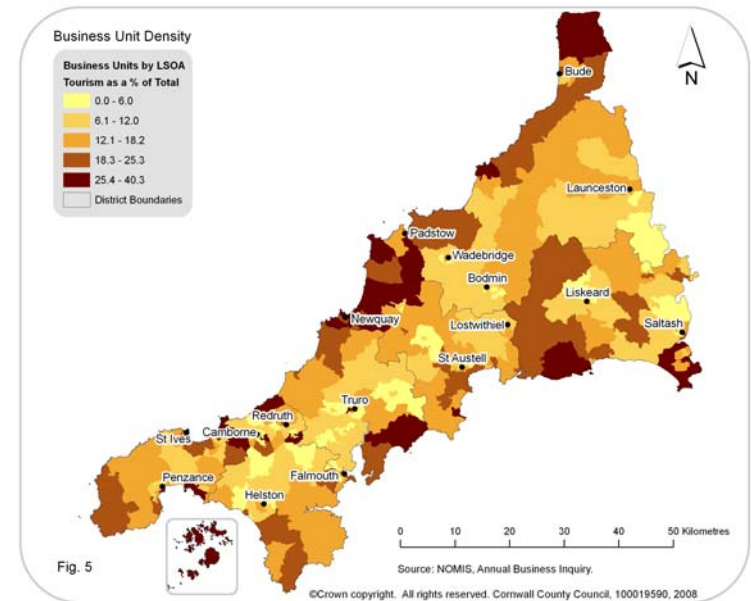
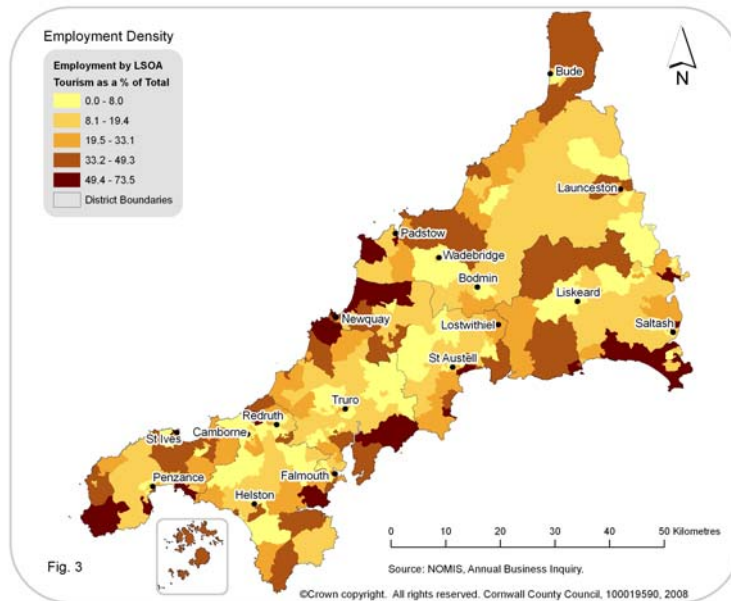
- There are 3300 business units in the tourism sector in Cornwall.
- Between 1999 and 2006 the number of business units in Cornwall increased by 15%
- The rate of increase was above that experienced across both the South West (13%) and Britain (8%) during the same period.
- The distribution of units by sizeband in Cornwall is similar to that found across Britain, with a concentration in the 1-10 sizeband (78%).
- Three-quarters (76%) of all employees are employed in units of 49 or fewer. This compares to 69% in the SW and 61% across GB.
- Business units in the tourism sector are larger than the average. Each data unit employs 9.6 employees compared to an average of 8.9 per unit across Cornwall.

### Spatial distribution (Broad)

- There are 13 wards where 40% plus are employed in tourism. All of these are coastal.
- Four wards account for nearly a fifth of all jobs in the sector - Boscawen (2,200), Gannel (1,800), St Ives South (1,000), and Rialton (1,000).

- Employment in seven LSOAs exceeds 500 employees, together these seven areas account for one in six of all tourist employment in Cornwall.
- With two exceptions, these are all coastal LSOAs. The other two in Truro reflect the cities role as a centre for entertainment and leisure.
- There are 22 LSOAs where tourism employment accounts for 50% or more of employment and a further 81 where it accounts for between 25% and 49.9%.
- A fifth of all business units are located in 7 wards – Boscawen, Gannel, St Ives South, Padstow and District, Looe and St Martin, Arwenack, Rialton.
- The highest percentage of tourism related units are found in coastal areas.
- There are 12 wards where tourism related units account for a quarter or more of all units.
- There are 32 LSOAs where tourism business units account for a quarter or more of all units.





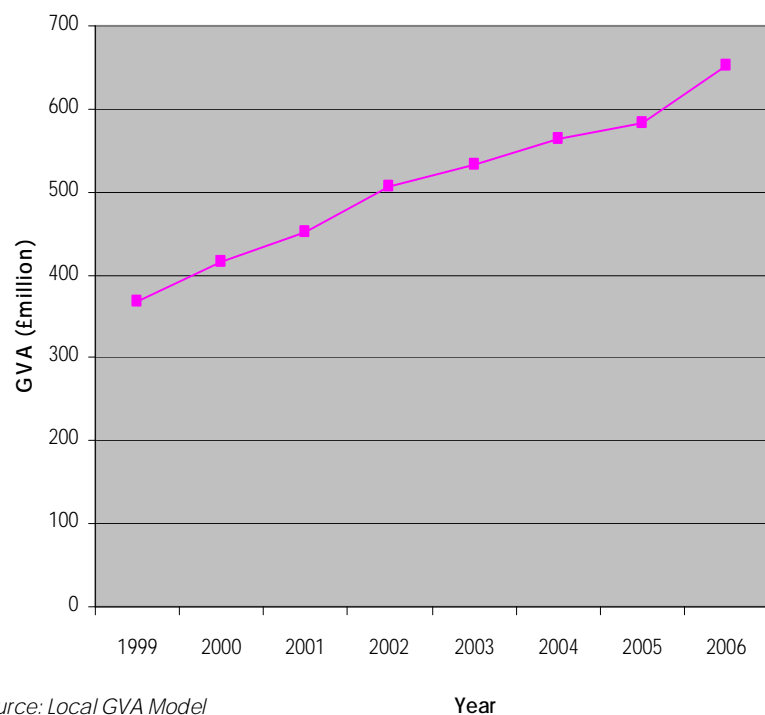
## Gross Value Added

- ✿ The tourism (Narrow) sector in Cornwall, has shown an increase in both relative and absolute terms of GVA. In relative terms growing slightly from 10.3% to 10.6%, in absolute terms (as shown in fig. 4) the sector has grown from £416 million in 1999 to £731 million in 2006.
- ✿ In 2006, the sector made up 10.6% of the economy in Cornwall.
- ✿ In 2004, the sector contributed to 10.6% of total GVA compared to 5.4% across the UK.
- ✿ Since 1999, the annual growth rate in GVA has been 8.4% compared to the 7.9% growth in GVA across all sectors in Cornwall.
- ✿ There were variations in the growth rates within the sector, with hotels (6.5%) camping (7.1%). Those concentrating on food, tended to show higher rates - Restaurants, snack bars, cafes (10.8%) Bars (10.7%).
- ✿ Transport related activities grew the fastest at 13.4%.
- ✿ The broader definition of tourism indicated that tourism accounted for 13% of GVA in 2006 (£896 million).
- ✿ The sector has shown growth since 1999, when at £493million it accounted for 12.2% of total GVA, with an annual growth rate of 8.9%.

## Productivity

- ✿ Productivity, measured by GVA per worker, equalled £18,300 in 2006, 66% of the average for Cornwall.
- ✿ Using the Full Time Equivalent (FTE) measure, gives a figure of £23,600, which is 31% below the average for Cornwall.

Fig. 6 Tourism GVA (narrow)



Source: Local GVA Model

## Earnings

- In 2006 median earnings for employees in the tourism sector across the UK varied. Amongst those engaged in the hotel and restaurants sector, which account for three-quarters of the total, averaging half the median. Amongst transport related categories earnings tended to be higher - Other supporting land transport activities (48%), Transport via railways (44%).

## Additional research required/data issues

Compilation of this profile has indicated that with different methodologies used by different organisations comparison is difficult.

## Caveats:

The size of the sector in this profile may differ to other research as each sector is made up by aggregating a number of other "subsectors" (see notes for employment SIC sectors incorporated in this profile). Other studies may use a broader or narrower definition.

Totals from each profile should not be added as data included within one profile may also be included within another profile. For example, 3220 - Manufacture of television and radio transmitters... and 3230 - Manufacture of television and radio receivers ..., are included in both the ICT sector profile and the Creative Industries (Broad) sector profile. Fish processing is included in both food and drink and fishing.

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

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 - for 2006 a turnover of 61,000, and/or are PAYE registered - employ at least one member of staff who earns more than £94/week, or £408/month.

### Annual Business Inquiry (ABI) - Employee Analysis, Workplace Analysis

Data source: NOMIS. Based on a sample.

Discontinuities in 2003 and 2006 make comparisons difficult over a period of time. The 2006 discontinuity means that comparisons of the 2006 ABI employment estimates with earlier years do not provide a reliable comparison.

Elements contributing to the discontinuity include:

1. Change in reference date from December to September.
2. Use of Business Register Survey data within the ABI/1 results.
3. Change to the Minimum Domain Methodology.

NOMIS state that 'It is not possible to measure the impact of the changes made precisely, however the scale of the overall discontinuity between the 2005 and 2006 ABI/1 is estimated to be in the range of 150,000 to 350,000 (0.6 to 1.3 per cent of the total number of employees) in a downward direction.'

All employment data from the ABI employee analysis has been rounded to the nearest 100 in line with release of data rules.

### Geographical anomalies

Data from different sources differs in its geographical coverage. The ABI covers Great Britain, ASHE data covers the United Kingdom.

### Earnings data

Earnings data by employment sector is only available at a UK level. Earnings levels in Cornwall are substantially lower and although it is expected that the difference applies across all sectors, the exact relationship is unknown, therefore care should be taken in interpreting the data.

## Data:

### Employment

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 –broad definition

	Part Time Workers	Full Time Workers	Total
	number	number	number
1999	9,200	9,700	18,900
2000	10,000	11,600	21,600
2001	13,500	11,900	25,400
2002	13,200	14,400	27,600
2003	14,800	13,300	28,100
2004	13,500	14,000	27,500
2005	11,200	15,300	26,400
2006	15,700	15,900	31,500

Source: NOMIS, Annual Business Inquiry © Crown Copyright

### Tourism employment as a % of total

	Cornwall	SW	GB
1999	12.7	10.2	10.5
2000	13.6	10.6	10.4
2001	15.0	10.8	10.6
2002	15.5	10.9	10.7
2003	15.6	11.1	10.8
2004	15.4	11.2	10.9
2005	14.4	11.1	10.8
2006	16.3	11.3	11.0

Source: NOMIS, Annual Business Inquiry © Crown Copyright

### Business Units

#### Tourism units as a percentage of all units

	Cornwall and Isles of Scilly	South West	Great Britain
	%	%	%
1999	15.6	11.8	11.2
2000	15.4	11.7	11.2
2001	15.3	11.7	11.2
2002	15.5	12.1	11.2
2003	15.5	12.0	11.1
2004	15.5	11.9	11.1
2005	15.1	11.6	10.9
2006	15.1	11.5	10.9

Source: NOMIS, Annual Business Inquiry © Crown Copyright

### Attractions

Data is available which shows the total number of visitors to those attractions "where it is feasible to charge admission for the sole purpose of sightseeing." Visit Britain, (2007). [This does, however, include attractions where admission is free such as museums]. In total this covers 43 attractions in Cornwall. The Eden Project tops the list with 1,152,332 visitors, placing it ninth amongst major paid attractions across England.

## Cornwall – visitor attractions

Attraction	Total visitors 2005	Total visitors 2006	% chang e 05-06
Eden Project	1177189	1152332	-2.1
St Michael's Mount	197435	196337	-0.6
Newquay Zoo	193152	191767	-0.7
Tintagel Castle	186054	183456	-1.4
The Minack Theatre and visitor Centre	169286	175374	3.6
Truro Cathedral	200000	140000	-30.0
Cotehele House	87000	120825	38.9
Trelissick Garden	114904	117992	2.7
Trebah Garden	104123	106278	2.1
Royal Cornwall Museum	100955	103534	2.6
National Maritime Museum Cornwall (E)	118608	101000	-14.8
Goonhilly Satellite Earth Station Experience	63445	75450	18.9
Pendennis Castle	56113	66958	19.3
Glendurgan Garden	62500	63000	0.8
Morwellham Quay	58745	56877	-3.2
Trengwainton Garden	46382	51457	10.9
Falmouth Art Gallery	43731	45949	5.1
Mevagissey Folk Museum	7079	43107	508.9
Tintagel Old Post Office	45000	42960	-4.5
Bodmin & Wenford Railway	43079	42724	-0.8
Geevor Tin Mine & Heritage Centre	35042	39744	13.4
Penlee House Gallery & Museum	35397	33118	-6.4
St Mawes Castle	28556	31627	10.8
Monkey Sanctuary (E 2005)	32388	30645	-5.4
Restormel Castle	20988	21147	0.8
Camel Valley Vineyards (E)	18000	20000	11.1
St Austell Brewery Visitor Centre (E)	DK	20000	na
Carnglaze Slate Caverns	19720	19944	1.1
Levant Steam Engine	16067	17441	8.6
Antony House	16352	17318	5.9

Wheal Martyn Museum	15000	16400	9.3
Cornish Mines & Engines	13201	15465	17.2
Launceston Castle	12983	15059	16.0
Trewithen Gardens	15614	13649	-12.6
Chysauster Ancient Village	12725	13266	4.3
Trelowarren (E)	10000	12500	25.0
Caerhays Castle Gardens	9696	10085	4.0
Polmassick Vineyard (E)	6000	5500	-8.3
Duke of Cornwall's Light Infantry Regiment Museum (E)	3500	4400	25.7
Antony Woodland Garden	4497	3830	-14.8
Perranzabuloe Folk Museum	2866	2439	-14.9
North Cornwall Museum & Gallery	1700	1800	5.9
Delabole Slate Quarry (E)	1180	1200	1.7

Visit Britain, (2007), Visitor Attraction Trends England 2006.

## Gross Value Added (GVA)

Tourism 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) – narrow

	Cornwall	UK
1999	416	44428
2000	464	46709
2001	506	48362
2002	566	50524
2003	604	52899
2004	632	55973
2005	657	na
2006	731	na

Source: Local GVA model © Nankivell 2008 & ONS © Crown Copyright

### GVA (% of total) – narrow

	Cornwall		UK	
1999		10.3		5.5
2000		10.6		5.6
2001		10.6		5.5
2002		10.6		5.4
2003		10.3		5.4
2004		10.6		5.4
2005		10.3		na
2006		10.6		na

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

### GVA - broad

	Cornwall		UK	
	£(million)	%	£(million)	%
1999	493	12.2	63 956	8.0
2000	560	12.8	67 062	8.0
2001	610	12.8	69 045	7.8
2002	689	12.9	71 768	7.7
2003	728	12.4	75 082	7.6
2004	770	12.9	79 192	7.6
2005	797	12.5	na	na
2006	896	13.0	na	na

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

## Earnings

**Employee weekly pay – tourism sector** [NB Earnings data by employment sector only available at a UK level].

Weekly pay - Gross (£) - For all employee jobs: United Kingdom, 2007

Weekly pay - Gross (£) - For all employee jobs: United Kingdom, 2007			
Description	Code	Median	As % of all
ALL EMPLOYEES		374.9	100.0
HOTELS AND RESTAURANTS	H	198.8	53.0
Hotels	5510	236.5	63.1
Camping sites and other provision of short-stay accommodation	552	235.4	62.8
Youth hostels and mountain refuges	5521	x	
Camping sites, including caravan sites	5522	252.8	67.4
Other provision of lodgings not elsewhere classified	5523	227.7	60.7
Restaurants	5530	167.2	44.6
Bars	5540	162.0	43.2
Canteens and catering	555	225.6	60.2
Canteens	5551	x	na
Catering	5552	225.7	60.2
Transport via railways	6010	546.9	145.9
Other scheduled passenger land transport	6021	428.3	114.2
Taxi operation	6022	x	na
Other passenger land transport	6023	320.0	85.4
Freight transport by road	6024	433.8	115.7
Scheduled air transport	6210	539.5	143.9
Non-scheduled air transport	6220	529.0	141.1
Other supporting land transport activities	6321	552.6	147.4
Other supporting air transport activities	6323	447.8	119.4
Activities of travel agencies and tour operators; tourist assistance activities not elsewhere classified	6330	326.5	87.1
Activities of other transport agencies	6340	460.0	122.7
Fair and amusement park activities	9233	234.0	62.4
Museum activities and preservation of historical sites and buildings	9252	346.0	92.3
Botanical and zoological gardens and nature reserve activities	9253	300.9	80.3
Gambling and betting activities	9271	275.2	73.4
Other recreational activities not elsewhere classified	9272	216.7	57.8

Source: ONS, (2007) Annual Survey of Hours and Earnings, Table 16.1a Weekly pay - Gross (£) - For all employee jobs: United Kingdom, 2007.

NB Earnings data by employment sector only available at a UK level.

The table below shows earnings levels in Cornwall compared to both the South West and Great Britain. All data for 2007.

### Median Earnings by workplace 2007

Area	All		All Full-time		All Part-time	
	£	%	£	%	£	%
Cornwall	304.9	81.3	373.3	81.7	140.4	97.6
South West	349.2	93.1	427.8	93.7	144.7	100.6
United Kingdom	374.9	100	456.7	100	143.9	100
Area	Male		Male full-time		Male part-time	
	£	%	£	%	£	%
Cornwall	358.9	77.3	399	80.1	149.7	108.6
South West	441.4	95	476.5	95.6	147.9	107.3
United Kingdom	464.5	100	498.3	100	137.8	100
Area	Female		Female Full-time		Female Part-time	
	£	%	£	%	£	%
Cornwall	239	83.1	344.4	87.4	138.7	95.3
South West	267	92.9	363.3	92.2	144	98.9
United Kingdom	287.5	100	394	100	145.6	100

Source: Annual Survey of Hours and Earnings, (2007). Table 7.1a Weekly pay - Gross (£) - For all employee jobs: United Kingdom, 2007.

## References

Office for National Statistics, (2007) Annual Survey of Hours and Earnings - 2007, Weekly pay - Gross (£) - For all employee jobs.

Cornwall County Council, (2004), *Living with Tourists, The Impact of Tourism, A report of the Impact of Tourism upon Health Care in Cornwall*. Single Issue Panel 2004.

Cornwall Tourism Forum (2004), Cornwall Tourism Forum Action Plan – The Way Forward.

House of Commons, (2000), The Tourism Industry, Research Paper 00/66, 23 JUNE 2000. Nankivell, O. (2008), The Cornwall Economy 1996-2006.

Office for National Statistics, (2007) Annual Survey of Hours and Earnings - 2007, Weekly pay - Gross (£) - For all employee jobs.

South West Tourism, SWRDA, (2005), Towards 2015 Shaping Tomorrow's Tourism. The Tourism Company, (2003). State of Tourism South West.

Visit Britain, (2007), Visitor Attraction Trends England 2006.

## Notes:

### Spatial distribution

The maps indicating the spatial distribution of employment and business units use both ward and Lower Super Output Areas. The wards are those used for District Council elections. Super output areas are a new geographical hierarchy designed to improve the reporting of small level statistics. They are now used in preference to administrative boundaries such as wards as they are of roughly equal population levels and are based on the area's characteristics, not historical events. The lower super output areas have a mean population size of 1,500.

### Gross Value Added (GVA)

#### What is Gross Value Added?

GVA measures the contribution each sector, industry or producer makes to the economy, and when added, the total value of economic activity in a particular area. It is used as an indicator of the value of economic activity that takes place within a sector, or area.

Tourism in this profile refers to the following SIC(2003) activities:

- 5510 Hotels
- 5521 Youth hostels and mountain refuges
- 5522 Camping sites, including caravan sites
- 5523 Other provision of lodgings not elsewhere classified
- 5530 Restaurants
- 5540 Bars
- 5551 Canteens
- 5552 Catering
- 6010 Transport via railways
- 6021 Other scheduled passenger land transport
- 6022 Taxi operation
- 6023 Other passenger land transport
- 6024 Freight transport by road
- 6210 Scheduled air transport
- 6220 Non-scheduled air transport
- 6321 Other supporting land transport activities
- 6323 Other supporting air transport activities
- 6330 Activities of travel agencies and tour operators; tourist assistance activities not elsewhere classified
- 6340 Activities of other transport agencies
- 9233 Fair and amusement park activities
- 9252 Museum activities and preservation of historical sites and buildings
- 9253 Botanical and zoological gardens and nature reserve activities
- 9271 Gambling and betting activities
- 9272 Other recreational activities not elsewhere classified
- 52 : Retail trade, except of motor vehicles and motorcycles; repair of personal and household goods

### Sector profiles in this format:

Advanced engineering  
Agriculture & forestry  
Agri-food  
Creative industries  
Environmental Technology  
Fishing  
Food and Drink  
Information & communication technology  
Manufacturing  
Marine  
Medical & health  
Tourism  
Voluntary

For further information about this or the other profiles in the series please contact Peter Wills, Corporate Economy and Europe Unit, Cornwall County Council: 01872 322520, [pwills@cornwall.gov.uk](mailto:pwills@cornwall.gov.uk)