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# Report

**Subject** : Quarterly Economic Indicators Report - September  
**Report to** : Planning & Economic Development Scrutiny Panel  
**Date** : 26<sup>th</sup> November 2007  
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**Cabinet Member for Portfolio** – Cllr Peter Edge

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## **SWEP Quarterly Economic Indicators Report**

### **1. Report Summary:**

At the previous meeting held on 22 October it was agreed that the panel would receive the Quarterly Economic Indicators reports produced by Wiltshire County Council Intelligence team for South Wiltshire Economic Partnership with appropriate interpretation of the data.

This report accompanies the latest Indicators report (attached as appendix 1). It explains why we produce the Indicators reports, how they sit alongside other reports, who produces them, why they are presented in their current format and how this could differ in the future.

### **2. Quarterly Economic Indicators report - background**

**2.1** Following a period of reorganisation in May 2006 the South Wiltshire Economic Partnership updated its terms of reference, this included many new objectives one of which was to 'monitor the economic health and vitality of south Wiltshire by formulating and recording set of appropriate economic indicators'

**2.2** These indicators were selected at a South Wiltshire Strategic Alliance conference in 2006 and later agreed and adopted by SWEP. They are divided into 13 sections:

- Population
- Employment
- Economic Activity
- Unemployment
- Job vacancies
- Qualifications
- Earnings
- Residential Property
- Commercial property
- Vat registrations
- Tourism
- Salisbury City Centre
- Tourism

# **South Wiltshire Economic Indicators Report**

Prepared for the South Wiltshire Economic Partnership  
and South Wiltshire Strategic Alliance

**September 2007**

**Compiled by  
The Economic Intelligence Unit  
Wiltshire County Council  
For  
Salisbury District Council**



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# **South Wiltshire Quarterly Economic Indicators Review**

## **September 2007**

The South Wiltshire Quarterly Economic Indicators Review aims to provide information on the health and vitality of the south Wiltshire economy; a key objective identified by the South Wiltshire Economic Partnership.

This document contains quarterly economic indicators subject to availability and annual indicators as and when they are released. Further analysis can be found in the South Wiltshire Economic Assessment [www.salisbury.gov.uk/economic-assessment.pdf](http://www.salisbury.gov.uk/economic-assessment.pdf)

For further information on this report please contact the Economic Development team on 01722 434677.

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## EXECUTIVE SUMMARY

- The ONS 2006 mid-year estimates put the **Population** of Salisbury district at 115,300. Salisbury has a lower proportion of people aged 15 to 24 compared to the regional and national averages. Salisbury also has a higher proportion of older people.
- The **Employment rate** between January 2006 and December 2006 was 79.6%, higher than the regional and national averages but lower than the Wiltshire average.
- The **Economic Activity rate** between January 2006 and December 2006 was 81.9%, higher than both the regional and national averages.
- **Unemployment** in July 2007 in Salisbury was low, at 0.7% (475 Claimants) it was below the county, regional and national averages.
- In July 2007, 447 **Job Vacancies** were notified to Jobcentre Plus. The largest requirement was for Elementary, Associate Professional & Technical and Skilled Trade occupations.
- In 2006, 25.8% of Salisbury's working age residents had **Qualifications** at NVQ Level 4 or above, below the regional and national averages.
- Residents median **Earnings** were £431 per week in 2006, above the South West but below the Great Britain average.
- In the second quarter of 2007 the **Average House Price** in Salisbury was £260,880. The average house price in 2006 was 11 times the resident median annual earnings.
- **Commercial Property** – the availability of office space declined between May 2006 and May 2007. The availability of industrial floorspace increased whilst employment land available remained static. In May 2007, Salisbury had approximately 19.9% of the office and 36.1% of the industrial floor space available in Wiltshire. Average commercial rents fell for both office and industrial premises.
- In 2005 there were 4,275 VAT registered businesses in Salisbury. There were 325 new **VAT registrations** in 2005.
- In 2006, the average spend per staying visitor was £56.89. The average spend per day visitor was £18.80.
- Football in the city saw a significant increase in September 2006 only to fall dramatically in November. In December 2006, the average football in the district was 132,879.
- The 2001 Census data show that Wiltshire had a significant **commuting** outflow. Salisbury also had an outflow; however it was a much lower flow than the county and other Wiltshire districts.

## 1. Population

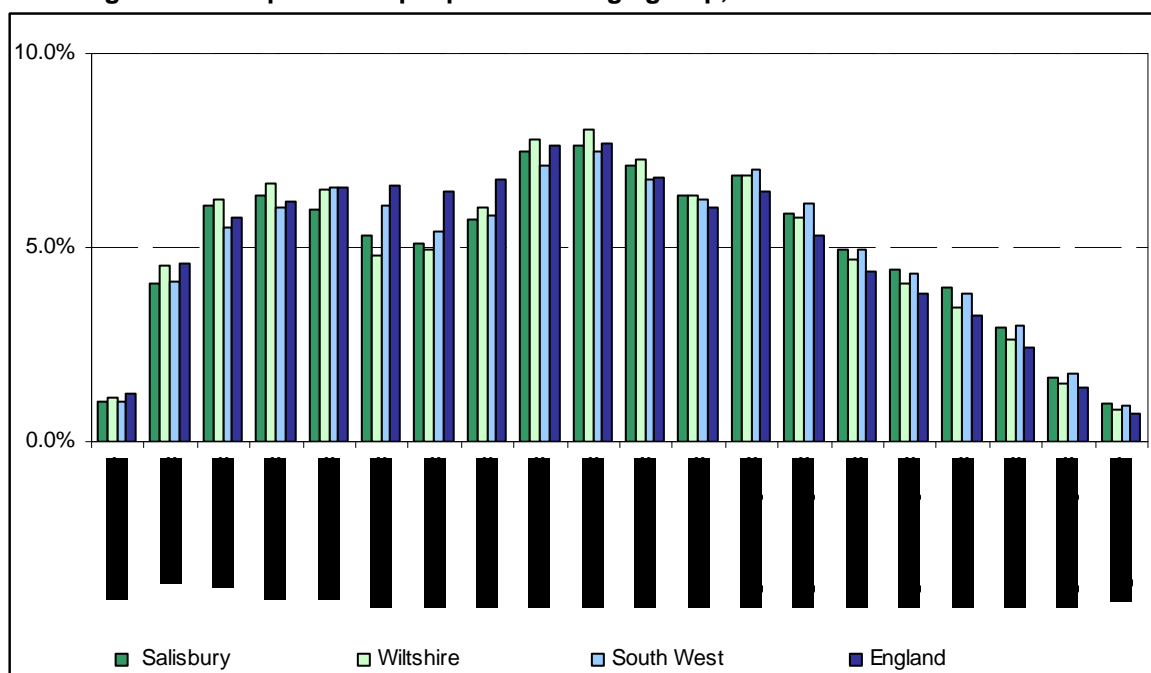
The ONS 2006 mid-year population estimates show that Salisbury had a population of 115,300. Table 1.1 shows the proportion of the total population in each age group for Salisbury district. Figure 1.1 shows the proportion of the total population in each age group for Salisbury district and benchmark areas. Salisbury has a lower proportion of those aged 15 to 24 than regionally and nationally. This reflects the fact that the district and indeed the county have no university, causing the resident population to leave in order to seek this level of education. It is also evident that the both Salisbury and the South West have higher proportions of older people than nationally.

**Table 1.1: Number and proportion of people in quinary age groups, Salisbury district, 2006**

	Population	% of population
Aged under 1 year	1200	1.0%
Aged 1 - 4 years	4700	4.1%
Aged 5 - 9 years	7000	6.1%
Aged 10 - 14 years	7300	6.3%
Aged 15 - 19 years	6900	6.0%
Aged 20 - 24 years	6100	5.3%
Aged 25 - 29 years	5900	5.1%
Aged 30 - 34 years	6600	5.7%
Aged 35 - 39 years	8600	7.5%
Aged 40 - 44 years	8800	7.6%
Aged 45 - 49 years	8200	7.1%
Aged 50 - 54 years	7300	6.3%
Aged 55 - 59 years	7900	6.9%
Aged 60 - 64 years	6800	5.9%
Aged 65 - 69 years	5700	4.9%
Aged 70 - 74 years	5100	4.4%
Aged 75 - 79 years	4600	4.0%
Aged 80 - 84 years	3400	2.9%
Aged 85 - 89 years	1900	1.6%
Aged 90 and over	1100	1.0%
Total	115,300	100.0%

Source: ONS Mid Year Population Estimates, National Statistics website: [www.statistics.gov.uk](http://www.statistics.gov.uk), 2007

**Figure 1.1: Proportion of people in each age group, 2006**



Source: ONS Mid Year Population Estimates, National Statistics website: [www.statistics.gov.uk](http://www.statistics.gov.uk), 2007

## 2. Employment

The employment rate is the proportion of an economy's working age population that is currently employed. The employment rate is an indicator of the number of people who are engaged in the labour market and gives an insight into the economy's ability to create jobs.

Table 2.1 contains data from the Annual Population Survey (APS) for the period January 2006 to December 2006, for Salisbury and surrounding areas. The employment rate in the district was 79.6%, which represents around 54,100 people. The district's employment rate was higher than the regional and national averages (77.9% and 74.3% respectively) but below the county average (81.4%). Employment rates in Winchester (81.8%) and Test Valley (85.2%) were higher than in Salisbury, however, the district performed favourably compared to Bournemouth (74.5%) and Southampton (70.5%).



**Table 2.1: Employment Rate, January 2006 to December 2006**

	Employment Rate
Great Britain	74.3
South West	77.9
Kennet	78.7
North Wiltshire	80.6
<b>Salisbury district</b>	<b>79.6</b>
West Wiltshire	85.5
Test Valley	85.2
Winchester	81.8
Bournemouth	74.5
Wiltshire	81.4
Southampton	70.5

Source: Annual Population Survey, National Statistics  
from NOMIS website: [www.nomisweb.co.uk](http://www.nomisweb.co.uk), 2007

Table 2.2 combines data from the Labour Force Survey (LFS) and the Annual Population Survey (APS) to show the trend between 1994 and 2006. The employment rate has fluctuated over the period, reaching its highest level in 1999 (88.2%). Since 2001 the rate has gradually fallen and stood at 78.3% in 2005. The data for 2006 show that the employment rate has increased by 1.3 percentage points in the last year.

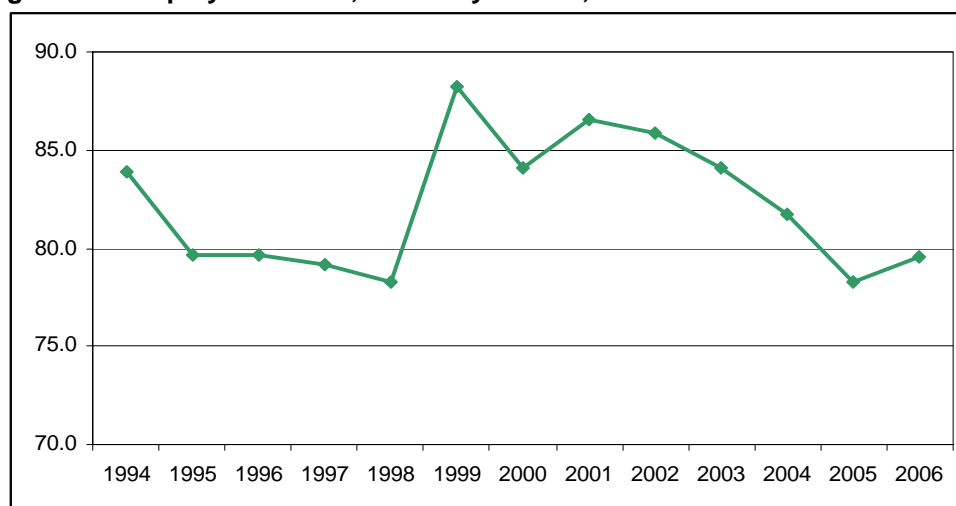
**Table 2.2: Employment Rate, Salisbury district, 1994 to 2006**

	Employment Rate	Rate change on previous year	Number Employed
1994	83.9	-	54,000
1995	79.7	-4.2	54,000
1996	79.7	0.0	51,000
1997	79.2	-0.5	50,000
1998	78.3	-0.9	50,000
1999	88.2	9.9	58,000
2000	84.1	-4.1	55,000
2001	86.6	2.5	57,000
2002	85.9	-0.7	57,000
2003	84.1	-1.8	56,500
2004	81.7	-2.4	55,100
2005	78.3	-3.4	52,900
2006	79.6	1.3	54,100

Source: Annual Population Survey, National Statistics from NOMIS  
website: [www.nomisweb.co.uk](http://www.nomisweb.co.uk), 2007

Figure 2.1 shows the employment rate over the period 1994 to 2006 and the trend as discussed above.

**Figure 2.1: Employment Rate, Salisbury district, 1994 to 2006**



Source: Annual Population Survey, National Statistics from NOMIS website: [www.nomisweb.co.uk](http://www.nomisweb.co.uk), 2007

### 3. Economic Activity

People are defined as economically active if they supply their labour to produce goods and services (i.e. the employed) or if they want to supply their labour to produce goods and services in the economy (i.e. the unemployed). The economic activity rate expresses the number of these people over the working age population. This rate helps to provide information about the health of the labour market.

Table 3.1 shows the economic activity rate between January 2006 and December 2006. The economic activity rate in the district was 81.9%, representing around 55,700 people. The rate in Salisbury was marginally above both the regional (81.0%) and national (78.6%) rate. The activity rate in the district was below the county average (84.1%) and the lowest of all the Wiltshire districts. However, Salisbury's performance bettered both Southampton (76.1%) and Bournemouth (77.4%).

**Table 3.1: Economic Activity Rate, January 2006 to December 2006**

Economic Activity Rate	
Great Britain	78.6
South West	81.0
Kennet	82.2
North Wiltshire	84.2
<b>Salisbury district</b>	<b>81.9</b>
West Wiltshire	87.4
Test Valley	87.3
Winchester	84.1
Bournemouth	77.4
Wiltshire	84.1
Southampton	76.1

Source: Annual Population Survey, National Statistics from NOMIS website: [www.nomisweb.co.uk](http://www.nomisweb.co.uk), 2007

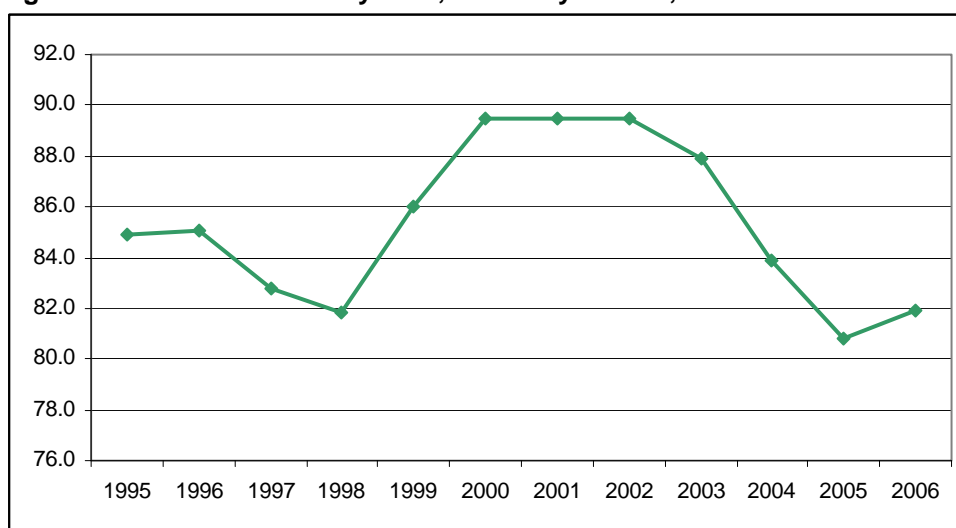
Salisbury's economic activity rate has fluctuated between 1995 and 2006. The rate reached its highest level (89.5%) between 2000 and 2002. However, since then the rate declined markedly and reached 80.8% in 2005, however by 2006 the rate had increased marginally to 81.9%. (Table 3.2 and Figure 3.1)

**Table 3.2: Economic Activity Rate, Salisbury district, 1994 to 2006**

	<b>Economic Activity Rate</b>	<b>Number Economically Active</b>
1995	84.9	57,000
1996	85.1	55,000
1997	82.8	54,000
1998	81.8	52,000
1999	86.0	56,000
2000	89.5	58,000
2001	89.5	56,000
2002	89.5	57,000
2003	87.9	60,000
2004	83.9	56,500
2005	80.8	54,600
2006	81.9	55,700

Source: Annual Population Survey, National Statistics from NOMIS website: [www.nomisweb.co.uk](http://www.nomisweb.co.uk), 2007

**Figure 3.1: Economic Activity Rate, Salisbury district, 1995 to 2006**



Source: Annual Population Survey, National Statistics from NOMIS website: [www.nomisweb.co.uk](http://www.nomisweb.co.uk), 2007

#### **4. Unemployment**

The Claimant Count rate is calculated from the number of people claiming Jobseekers Allowance in a given month, divided by the working age population of an area. To be entitled to claim unemployment benefit those claiming must be out of work, available for, capable of and actively seeking employment.

In 1995, there were nearly 3,500 people claiming Jobseekers Allowance in the district, representing 5.3% of the working age population. Between 1995 and 2005 Claimant rates fell and reached their lowest level in 2005 (0.6%, around 400 claimants). Since 2005, Claimant rates have increased slightly, in line with the national trend. However, Salisbury's claim rate still remains well below the regional and national averages. Table 4.2 shows how the numbers and rates have fluctuated over the more recent past.

**Table 4.1: Claimant Count Rate, Salisbury district, July 06 to July 07**

	Number of JSA Claimants	JSA Claimant Rate
July 2006	530	0.8
August 2006	560	0.8
September 2006	597	0.9
October 2006	601	0.9
November 2006	556	0.8
December 2006	555	0.8
January 2007	607	0.9
February 2007	640	0.9
March 2007	604	0.9
April 2007	556	0.8
May 2007	528	0.8
June 2007	479	0.7
July 2007	475	0.7

Source: Claimant Count, National Statistics from NOMIS website: [www.nomisweb.co.uk](http://www.nomisweb.co.uk), 2007

Table 4.2 shows the Claimant Count rate for Salisbury and surrounding areas. In July 2007, the Claimant Count rate in the district was 0.7%, below both the county (0.9%), regional (1.4%) and national (2.3%) averages. The rate in the district was on a par with Kennet (0.7%), but below the levels in both North Wiltshire (0.9%) and West Wiltshire (1.2%). It was also below the rates in Winchester (0.8%), Test Valley (0.9%), Bournemouth (1.6%) and Southampton (2.2%).

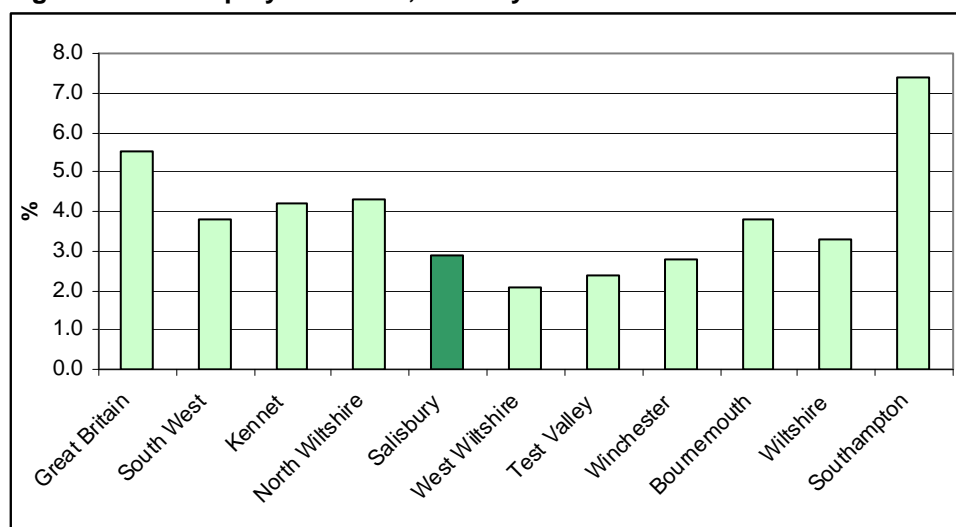
**Table 4.2: Claimant Count, July 2006 to July 2007**

	July 2006	April 2007	May 2007	June 2007	July 2007
Great Britain	2.6	2.5	2.4	2.3	2.3
South West	1.6	1.5	1.5	1.4	1.4
Kennet	0.8	0.8	0.8	0.8	0.7
North Wiltshire	1.1	1.1	1.1	1.0	0.9
<b>Salisbury</b>	<b>0.8</b>	<b>0.8</b>	<b>0.8</b>	<b>0.7</b>	<b>0.7</b>
West Wiltshire	1.3	1.3	1.2	1.2	1.2
Test Valley	0.9	1.0	0.9	0.9	0.9
Winchester	1.0	1.0	0.9	0.8	0.8
Bournemouth	2.0	1.7	1.6	1.6	1.6
Wiltshire	1.0	1.0	1.0	0.9	0.9
Southampton	2.5	2.4	2.3	2.3	2.2

Source: Claimant Count, National Statistics from NOMIS website: [www.nomisweb.co.uk](http://www.nomisweb.co.uk), 2007

The Claimant Count is not a count of all those who are unemployed. The International Labour Organisation's definition of unemployment includes any person looking for work, whether or not they are claiming Jobseekers Allowance. Using this definition, Figure 4.1 shows that around 1,600 people (2.9%) were unemployed in Salisbury. The district's unemployment rate was below the county (3.3%), regional (3.8%) and national (5.5%) averages. It was also below the rates in Bournemouth (3.8%), Kennet (4.2%), North Wiltshire (4.3%) and Southampton (7.4%). However, West Wiltshire, Test Valley and Winchester all had unemployment rates lower than the Salisbury average (2.1%, 2.4% and 2.8% respectively).

**Figure 4.1: Unemployment Rate, January 2006 to December 2006**



Source: Annual Population Survey, National Statistics from NOMIS website: [www.nomisweb.co.uk](http://www.nomisweb.co.uk), 2007

## 5. Job Vacancies

Jobcentre Plus vacancies have traditionally served as a proxy for economic activity over time. However, it is important to note that Jobcentre Plus only handles part of the total vacancies in an economy. Measures of the market share will always be inexact but recent estimates from surveys suggest that it is between third and half. Between July 2006 and July 2007 the number of vacancies notified to Jobcentres in Salisbury district varied greatly. The largest number of vacancies were reported in July 2006 (720 vacancies), the smallest number of vacancies were reported in January 2007 (271 vacancies) (Table 5.1).

**Table 5.1: Jobcentre Plus Vacancies, July 2006 to July 2007**

Date	Total Number of Vacancies Notified
July 2006	720
August 2006	397
September 2006	541
October 2006	466
November 2006	441
December 2006	503
January 2007	271
February 2007	497
March 2007	540
April 2007	677
May 2007	686
June 2007	627
July 2007	447

Source: Jobcentre Plus Vacancies, National Statistics from NOMIS website: [www.nomisweb.co.uk](http://www.nomisweb.co.uk), 2007

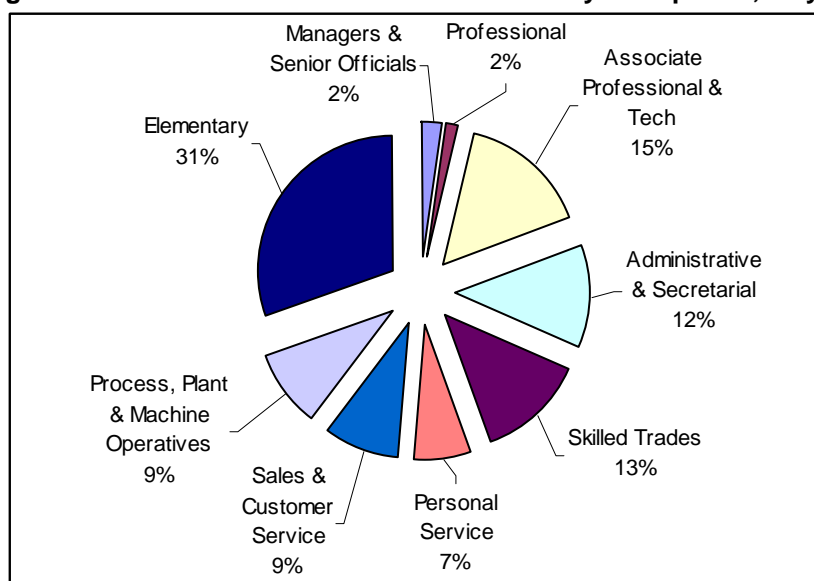
Table 5.2 shows the Jobcentre plus vacancies notified by occupation between July 2006 and July 2007. In July 2007 there were 447 vacancies notified to Jobcentre Plus, this was significantly lower than in the same period a year previously. The largest proportion of these vacancies were in Elementary occupations (136 jobs). Associate Professional & Technical (69 jobs), Skilled Trades (58 jobs) and Administrative & Secretarial occupations (54 jobs) also had large levels of demand. The most significant increase in the proportion of vacancies notified in July 2007 compared to vacancies notified in July 2006, were in Elementary, Associate Professional & Technical, Administrative & Secretarial and Skilled Trade occupations. Sales & Customer Service and Process, Plant & Machine Operatives occupations experienced the most significant fall in share of vacancies notified between July 2006 and July 2007.

**Table 5.2: Jobcentre Plus Vacancies Notified by Occupation, July 2006 and July 2007**

	July 2006		July 2007	
	Number of Vacancies	%	Number of Vacancies	%
Managers & Senior Officials	20	2.8	11	2.5
Professional	9	1.2	7	1.6
Associate Professional & Tech	44	6.1	69	15.4
Administrative & Secretarial	51	7.1	54	12.1
Skilled Trades	70	9.7	58	13.0
Personal Service	40	5.6	30	6.7
Sales & Customer Service	184	25.6	40	8.9
Process, Plant and Machine Operatives	151	21.0	42	9.4
Elementary	151	21.0	136	30.4
Total	720	-	447	-

Source: Jobcentre Plus Vacancies, National Statistics from NOMIS website: [www.nomisweb.co.uk](http://www.nomisweb.co.uk), 2007

**Figure 5.1: Jobcentre Plus Vacancies Notified by Occupation, July 2007**



Source: Jobcentre Plus Vacancies, National Statistics from NOMIS website: [www.nomisweb.co.uk](http://www.nomisweb.co.uk), 2007

## 6. Qualifications

The Leitch report (2004) emphasised the need for increased skill levels. The report states that low level skills can be a deterrent to increasing productivity and growth. In 2006, around 17,500 (25.8%) residents of working age were qualified to NVQ Level 4 or above. This was below the county (28.7%), regional (27.3%) and national (27.4%) average. However the district had a higher proportion of people qualified to NVQ Level 3 compared to the national average (19.6% compared to 15.2%) and a lower proportion of residents with no qualifications (11.2% compared to 13.8%).

**Table 6.1: Qualifications-working age Residents (%), 2006**

	% with NVQ4+	% with NVQ3	% with NVQ2	% with NVQ1	% with other qualifications	% with no qualifications
Great Britain	27.4	15.2	15.8	13.9	8.5	13.8
South West	27.3	17.1	17.1	15.2	7.7	9.8
Kennet	20.0	13.9	17.7	16.7	11.9	13.7
North Wiltshire	31.6	14.2	19.3	11.6	11.6	5.8
West Wiltshire	33.6	16.6	12.0	16.4	6.4	6.7
Test Valley	29.5	20.5	14.8	12.5	6.5	7.9
Winchester	46.5	16.8	14.7	9.2	8.2	3.9
Southampton	26.2	19.9	14.6	16.7	7.2	10.5
Bournemouth	27.2	18.1	17.4	11.4	11.3	8.6
Wiltshire	28.7	16.2	15.9	15.1	8.8	8.8
<b>Salisbury</b>	<b>25.8</b>	<b>19.6</b>	<b>14.8</b>	<b>16.6</b>	<b>6.1</b>	<b>11.2</b>

Source: Annual Population Survey, National Statistics from NOMIS website: [www.nomisweb.co.uk](http://www.nomisweb.co.uk), 2007

Table 6.2 shows the trend over the period 1994 to 2006 for residents in the district qualified to NVQ Level 4+ (or equivalent) and the trend over the period 1999 to 2006 for those residents qualified to NVQ Level 3 or above. In general, in the period up to 2003, there was an increase in the proportion of residents with qualifications at NVQ level 3+ and NVQ level 4+. The Annual Population Survey (APS) was introduced in 2004, although qualifications data for the first year are unavailable. The methodology for the APS is the same as for the former local area Labour Force Survey (LFS), however, the data for 2005 shows that the proportion of the population in Salisbury district qualified to NVQ level 3+ and level 4+ has fallen significantly. The data for 2006 show a slight increase in the proportion of people qualified to this level, however the proportions of people qualified to NVQ level 3+ and 4+ remains well below the levels in 2003. It is not possible to state with certainty whether the decline in qualifications is an accurate reflection of the qualification levels in Salisbury or if improvements to the collection of APS data are responsible for this change. Future releases of this data set should help to clarify this situation.

**Table 6.2: % of working age population qualified to NVQ level 3+ and level 4+ (or equivalent), 1994 to 2006**

	% of working age population with NVQ level 3+		% of working age population with NVQ level 4+	
	Salisbury	Wiltshire	Salisbury	Wiltshire
1994	#	#	20.6	19.5
1995	#	#	21.7	21.0
1996	#	#	22.4	22.8
1997	#	#	26.3	23.3
1998	#	#	24.2	24.8
1999	40.0	42.2	26.3	25.7
2000	44.4	46.0	27.3	28.4
2001	44.2	45.4	26.3	26.7
2002	50.5	45.9	28.0	24.6
2003	57.9	47.0	35.8	27.0
2004	#	#	#	#
2005	42.8	46.3	24.5	27.3
2006	48.3	48.1	25.8	28.7

Source: Labour Force Survey, Annual Population Survey, National Statistics from NOMIS website:  
[www.nomisweb.co.uk](http://www.nomisweb.co.uk), 2007

# Data unavailable

## 7. Earnings

The statistics presented below are from the Annual Survey of Hours and Earnings (ASHE). The median earnings of residents in Salisbury in 2006 were £431 per week, higher than the South West, Southampton and Bournemouth averages (£424, £401 and £396 respectively). In contrast, median workplace based earnings were £414 and were marginally below the regional average (£417) as well as below the national average (£449). Weekly workplace based earnings in Salisbury were higher than the workplace earnings in Kennet (£393), West Wiltshire (£362) and Bournemouth (£382) whilst being on a par with the Wiltshire average. Winchester had the highest level of earnings by both residence and workplace compared to all other areas in Table 7.1 (£559 and £482 respectively).



**Table 7.1: Median weekly earnings (full time), 2006**

	Resident	Workplace
Great Britain	449.6	448.6
South East	488.7	470.1
South West	423.5	417.0
Kennet	447.0	393.3
North Wiltshire	499.4	459.9
<b>Salisbury</b>	<b>431.2</b>	<b>413.9</b>
West Wiltshire	449.2	361.7
Test Valley	501.1	456.5
Winchester	559.4	482.6
Southampton	401.2	461.1
Bournemouth	395.8	382.3
Wiltshire	455.3	413.7

Source: ASHE, National Statistics from Nomis website:  
[www.nomisweb.co.uk](http://www.nomisweb.co.uk), 2007

Table 7.2 shows the mean annual earnings trend by workplace and residence for Salisbury for full-time employees. Annual workplace earnings have risen significantly from £19,261 in 1999 to £27,171 in 2006<sup>1</sup>. Annual earnings for residents have also risen over the period 2002 to 2006 and remain consistently above the workplace earnings. This was in line with the situation throughout much of Wiltshire, and demonstrates that residents can earn higher wages by commuting out of the district.

**Table 7.2: Average Earnings (Full time), Salisbury district, 1999-2006**

	Workplace Earnings Annual £	Resident Earnings Annual £
1999	19,261	-
2000	19,983	-
2001	21,258	-
2002	21,829	24,492
2003	23,124	25,348
2004	23,317	27,785
2005	26,390	28,289
2006	27,171	27,791

Source: ASHE, National Statistics from Nomis website:  
[www.nomisweb.co.uk](http://www.nomisweb.co.uk), 2007

Table 7.3 shows the median earnings trend in Salisbury by residence and workplace. The ONS has adopted median earnings as its preferred measure because it is less influenced by extreme levels of earnings. Median earnings for both workplace and residence are lower than mean earnings but follow the same trend and have increased over the period. In 2006,

<sup>1</sup> Between 1999 and 2006 earnings in Great Britain rose by 37.9%. The growth rate of earnings in Salisbury district was higher at 41.1%. It is important to note however that this growth takes no account of inflation. Using the Consumer Price Index (CPI) it is possible to estimate that the real growth in earnings was lower at 27.2%.

median annual earnings for residents were £22,187, compared to £21,597 for those who worked in Salisbury.

**Table 7.3: Median Earnings (Full time), Salisbury district, 1999 to 2006**

	<b>Workplace Earnings Annual £</b>	<b>Resident Earnings Annual £</b>
1999	15,986	-
2000	16,821	-
2001	18,411	-
2002	18,038	19,683
2003	18,975	20,510
2004	20,544	21,440
2005	20,933	22,300
2006	21,597	22,187

Source: ASHE, National Statistics from Nomis website: [www.nomisweb.co.uk](http://www.nomisweb.co.uk), 2007

## 8. Residential Property

The average house price in the second quarter of 2007 in Salisbury district was £260,880. The average price for a detached property in the district was £367,177, higher than the level in both North and West Wiltshire, but lower than the average cost of a detached property in Kennet. The average house price in Salisbury was lower than overall average house prices in Test Valley and Winchester, but higher than the average price for properties in Southampton and Bournemouth.

Table 8.1 shows the average house price trend between 2002 and 2006. Over this period house prices have continued to grow, but the rate at which they have done so has begun to slow down. In the late 90's and first few years after the turn of the century, house prices rose sharply in Salisbury, some by as much as 25% in one year. However, in 2006, the increase in house prices since the previous year was just 2.7%. In 2002, the earnings to house price ratio was 1:9, by 2004 this had risen to 1:11. This demonstrates that house prices in the district have been rising faster than earnings.

**Table 8.1: Earnings: House prices ratio, 2002 to 2006<sup>2</sup>**

	<b>Average house price (£)</b>	<b>% increase in house prices</b>	<b>Resident annual earnings</b>	<b>Earnings: House price ratio</b>
2002	176,789	-	19,683	9
2003	208,935	18.2	20,510	10
2004	230,611	10.4	21,440	11
2005	240,935	4.5	22,300	11
2006	247,420	2.7	22,187	11

Source: Residential Property Price Data, Land Registry, ASHE, National Statistics from Nomis website: [www.nomisweb.co.uk](http://www.nomisweb.co.uk), 2007

<sup>2</sup> The ratios are calculated using the sum of four quarters of average house prices as a 'rolling mean' and median earnings for the appropriate year

In 2006, Winchester (£314,605) had the highest average house price of all benchmark areas. Test Valley (£256,569) and Kennet (£264,258) also had higher average house prices than in Salisbury (£247,420). Kennet had the highest wage:house price ratio, with house prices being nearly 12 times median earnings. Salisbury was only slightly behind with average house prices over 11 times median earnings.

**Table 8.2: Earnings: House prices ratio, 2006**

	Average house price (£) 2006	Median Earnings (£) 2006	Wage: House Price ratio
England & Wales	202,978	23,824	1:9
South East	241,250	26,001	1:9
South West	209,332	22,442	1:9
Wiltshire	224,690	23,843	1:9
Kennet	264,258	22,415	1:12
North Wiltshire	220,781	26,335	1:8
<b>Salisbury</b>	<b>247,420</b>	<b>22,187</b>	<b>1:11</b>
West Wiltshire	192,030	23,612	1:8
Test Valley	256,569	26,484	1:10
Southampton	167,763	22,267	1:8
Winchester	314,605	29,753	1:11
Bournemouth	207,469	20,342	1:10

Source: Residential Property Price Data, Land Registry, ASHE, National Statistics from Nomis website: [www.nomisweb.co.uk](http://www.nomisweb.co.uk), 2007

## 9. Commercial Property

The data in this section is taken from the Evolutive database managed by Wiltshire County Council. It is important to note that this database does not contain all floorspace available at any one time, but it provides a fairly representative picture of commercial property available in the county.

### Office Premises

During the period May 2006 – May 2007, the overall availability of office floorspace within Wiltshire declined by 18.3% from a total of 834,932 sq ft to 682,487 sq ft; with the number of available units falling from 224 to 163. In contrast, Salisbury experienced an increase in the availability of office premises (9.6%).

The increase in the availability of office premises witnessed in Salisbury across the May 2006 – May 2007 period can be attributed principally to limited take up of properties during this period and 15,661 sq ft of office premises coming on to the market at Churchfields Industrial Estate.

**Table 9.1: Office Availability, Wiltshire, May 2006 – May 2007**

Area	May 2006 Sq Ft	% of all office space available	May 2007 Sq Ft	% of all office space available
North Wiltshire	388,123 sq ft (66)	46.5	269,232sq ft (52)	39.4
Kennet	55,859 sq ft (34)	6.7	48,278 sq ft (20)	7.1
West Wiltshire	267,156 sq ft (60)	32.0	229,300 sq ft (51)	33.6
<b>Salisbury</b>	<b>123,794 sq ft (64)</b>	<b>14.8</b>	<b>135,677 sq ft (40)</b>	<b>19.9</b>
Wiltshire	834,932 sq ft (224 units)	-	682,487 sq ft (163 units)	-

Source: *Evoluteive, Wiltshire County Council, 2007*

### **Industrial Premises**

Between May 2006 and May 2007, the number of industrial units available across Wiltshire fell quite sharply from 292 to 206, with total available industrial floorspace falling from 1,606,496 sq ft to 1,279,425 sq ft. At district level, the availability of industrial premises fell in North Wiltshire (35.1%), Kennet (20.2%) and West Wiltshire (43.3%), but actually increased quite significantly in the Salisbury area (37.2%).

The increase seen in the availability of industrial premises within Salisbury district can be explained by 139,738.6 sq ft of floorspace becoming available at Minton Distribution Park in Amesbury, which offset the decline in the total number of available industrial units within the district from 91 in May 2006 to 75 units in May 2007

**Table 9.2: Industrial Availability, Wiltshire, May 2006 – May 2007**

Area	May 2006 Sq Ft	% of all industrial space available	May 2007 Sq Ft	% of all industrial space available
North Wiltshire	738,199 sq ft (76)	46.0	478,875 sq ft (60)	37.4
Kennet	161,468 sq ft (53)	10.0	128,917 sq ft (27)	10.1
West Wiltshire	369,951 sq ft (72)	23.0	209,598 sq ft (44)	16.4
<b>Salisbury</b>	<b>336,878 sq ft (91)</b>	<b>21.0</b>	<b>462,035 sq ft (75)</b>	<b>36.1</b>
Wiltshire	1,606,496 sq ft (292 units)	-	1,279,425 sq ft (206 units)	-

Source: *Evoluteive, Wiltshire County Council, 2007*

## Employment Land

In the period May 2006 to May 2007, employment land availability across Wiltshire fell slightly by 12.0% from 165.7 acres to 145.9 acres, with the total number of sites declining from 18 in May 2006 to 15 in May 2007. Employment land availability remained static in both Kennet and Salisbury across the May 2006 – May 2007 period.

**Table 9.3: Employment Land Availability, Wiltshire, May 2006 – May 2007**

Area	May 2006	May 2007
	Acres	Acres
North Wiltshire	11.67 (3 sites)	15.92 (4 sites)
Kennet	2.5 (1 site)	2.5 (1 site)
West Wiltshire	40.06 (9 sites)	15.94 (5 sites)
<b>Salisbury</b>	<b>111.5 (5 sites)</b>	<b>111.5 (5 sites)</b>
Wiltshire	165.73 (18 sites)	145.86 (15 sites)

Source: Evolutive, Wiltshire County Council, 2007

## Average Commercial Rents

Average commercial rents for office premises fell in three districts across the spring 2006 to spring 2007 period; decreasing by 16.5% in Chippenham (from £9.46 per sq ft to £7.90 per sq ft), by 15.4% in Salisbury (from £9.78 to £8.27 per sq ft) and by 3.4% in Devizes from (£6.26 to £6.05 per sq ft). The fall in average commercial rents for office premises experienced in Salisbury is accounted for principally by the take up of a number of units with rents in excess of £10 per sq ft; in spring 2006 there were nine available properties with rents in excess of £10 per sq ft (one of which had a rent of £28.13 per sq ft, and one of which had a rent of £15.03 per sq ft), compared to just five in spring 2007.

With respect to average commercial rents for industrial premises, Salisbury witnessed a decline. Average commercial industrial rents fell by 7.0% in Salisbury (from £6.87 per sq ft to £6.39 per sq ft). This decline seen was due to the take up of four units at Churchfields Industrial Estate in Salisbury and three units at Portway Business Centre, Old Sarum all with rents in excess of £7 per sq ft.

**Table 9.4: Average Commercial Rents, Wiltshire, (£ per sq. ft per annum) spring 2006 – spring 2007**

Area	March/April/May		March/April/May	
	Office	Industrial	Office	Industrial
Chippenham	9.46 (23)	5.03 (18)	7.90 (15)	4.51 (10)
Devizes	6.26 (21)	5.68 (32)	6.05 (7)	5.63 (12)
<b>Salisbury</b>	<b>9.78 (25)</b>	<b>6.87 (43)</b>	<b>8.27 (20)</b>	<b>6.39 (38)</b>
Trowbridge	9.05 (14)	3.82 (14)	9.80 (16)	3.54 (6)

Source: Evolutive, Wiltshire County Council, 2007

## 10. VAT Registrations

The data for VAT registrations and de-registrations comes from the Small Business Service. This data is useful as an indicator of the health of the economy and level of entrepreneurship; however, it is important to note that the figures may not relate to actual business start-ups or closures.

Over the period 1994 to 2005 the stock of businesses in Salisbury had increased. The largest growth in stocks was seen between 1996 and 2000. In 2005, there were 4,275 VAT registered businesses in Salisbury, 325 new businesses registered, whilst 315 businesses de-registered. The number of registrations in Salisbury had reduced slightly since its peak in 1998. In 2005 there were 28.1 registrations per 10,000 population, compared to 37.5, in Kennet, 37.1, in North Wiltshire and 32.6 in West Wiltshire. (Table 10.1)

**Table 10.1: VAT Registrations, De-registrations and Stocks, 1994 to 2005**

Date	Registrations	De-registrations	Stocks at end of year	Net-change
1994	370	330	3,800	40
1995	320	320	3,800	0
1996	375	285	3,890	90
1997	405	330	3,965	75
1998	425	325	4,065	100
1999	400	340	4,125	60
2000	395	320	4,195	75
2001	370	375	4,190	-5
2002	380	345	4,225	35
2003	385	390	4,220	-5
2004	365	330	4,255	35
2005	325	315	4,275	10

Source: VAT Registrations and De-Registrations, National Statistics from Nomis website: [www.nomisweb.co.uk](http://www.nomisweb.co.uk), 2006

## 11. Tourism

The average spend per staying visitor per 24 hours (including spend on commercial accommodation) was £56.89. Staying visitors based in serviced accommodation in Salisbury spent an average of £28.64 on accommodation per person per night. Table 11.1 shows that while this was an increase from 2002 and 2004, it was still well below the average for historic towns and 'other destinations'.

**Table 11.1: Average spend of staying visitors (£/per person/per day)**

<i>Category of expenditure</i>	<b>Salisbury 2002</b>	<b>Salisbury 2004</b>	<b>Salisbury 2006</b>	<b>Historic towns 2006</b>	<b>All destinations 2006</b>
Commercial accomm.	£26.22	£20.83	£28.64	£34.59	£30.63
Eating out	£6.31	£9.63	£15.16	£12.72	£13.09
Shopping	£8.19	£7.54	£8.89	£11.73	£13.74
Entertainment	£0.74	£1.85	£3.38	£4.21	£4.72
Travel	£1.28	£2.87	£0.82	£2.38	£3.39
<b>Total average spend</b>	<b>£42.74</b>	<b>£42.72</b>	<b>£56.89</b>	<b>£65.63</b>	<b>£65.57</b>

*Source: Tourism South East, Salisbury Destination Benchmarking Visitor Survey, 2007*

Day visitors to Salisbury spent an average of £18.80 per person per day. Table 11.2 shows that this was again well below the average for 'all historic towns' (£23.82) and 'all destinations' (£24.87).

**Table 11.2: Average spend of day visitors (£/per person/per day)**

<i>Category of expenditure</i>	<b>Salisbury 2002</b>	<b>Salisbury 2004</b>	<b>Salisbury 2006</b>	<b>Historic towns 2006</b>	<b>All destinations 2006</b>
Eating out	£5.35	£3.57	£7.13	£6.71	£6.87
Shopping	£14.87	£8.78	£9.37	£11.77	£12.28
Entertainment	£0.40	£0.86	£1.04	£2.97	£2.98
Travel	£2.16	£1.48	£1.26	£2.37	£2.74
<b>Total average spend</b>	<b>£22.78</b>	<b>£14.69</b>	<b>£18.80</b>	<b>£23.82</b>	<b>£24.87</b>

*Source: Tourism South East, Salisbury Destination Benchmarking Visitor Survey, 2007*

## **12. Salisbury City Centre**

Footfall in the city saw a significant increase in September only to fall dramatically in November as shoppers held off on purchases, forcing retailers to announce sales earlier in December. Butcher Row has risen in popularity since the introduction of a café culture and was the busiest street in 2006, followed by the High Street.

There are no comparative figures available due to improvements in the footfall measuring procedure.

**Table 12.1: Hourly average footfall per month, Salisbury, by street, 2006<sup>3</sup>**

Street	Jan	Feb	Mar	April	May	June	Jul	Aug	Sept	Oct	Nov	Dec
Fisherton Street N	1,373	1,596	1,405	1,788	2,107	1,755	1,340	2,043	1,979	1,468	1,340	1,915
Fisherton Street S	1,628	2,075	1,564	2,266	2,330	3,447	2,521	2,202	2,202	1,212	1,149	1,691
Silver Street	18,162	17,365	15,896	15,258	10,502	14,204	16,566	16,183	16,023	19,854	9,256	14,108
Butcher Row	21,386	18,514	14,651	18,641	15,226	11,044	15,449	15,704	27,132	22,758	14,300	18,737
The Maltings	12,672	15,002	13,055	18,067	12,225	15,608	14,840	13,821	16,885	10,884	9,065	15,896
High Street N	14,364	20,525	13,343	18,865	14,556	18,577	18,896	17,172	20,620	24,195	13,502	15,736
High Street S	12,193	16,120	13,662	19,503	17,524	16,055	22,120	15,481	21,067	20,620	10,086	20,652
New Canal	16,120	13,215	12,162	14,779	13,981	10,054	13,310	12,161	15,864	16,023	10,150	15,672
Catherine Street	17,524	15,929	10,789	14,364	11,587	7,884	11,044	10,980	17,747	20,524	7,788	14,172
Blue Boar Row	16,343	19,248	13,470	16,152	14,332	10,182	12,799	14,810	21,992	21,992	13,342	14,300
<b>Total</b>	<b>131,766</b>	<b>139,586</b>	<b>109,996</b>	<b>139,682</b>	<b>114,369</b>	<b>108,810</b>	<b>128,885</b>	<b>120,557</b>	<b>161,511</b>	<b>159,530</b>	<b>89,978</b>	<b>132,879</b>

Source: Salisbury City Centre Management Ltd, 2007

### 13. Commuting

Wiltshire along with many of the other 'shire' counties has a significant commuting outflow. There are many reasons for this including, house prices, gravitational pull of jobs in urbanised areas and desire to live in a small (er) town/rural environment.

The Census data show that whilst the district had a net outflow of commuters in 2001, this outflow was lower than in the remaining Wiltshire districts. At 78%, Salisbury had a higher proportion of people who were living and working in the district compared to Kennet (62%), North Wiltshire (62%) and West Wiltshire (70%). Swindon, Southampton and Winchester all had a large number of in-commuters. (Table 13.1 and Figure 13.1)

<sup>3</sup> Figures are based on three 10 minute counts taken at each location each month. The average is then taken and the British Retail Consortium Footfall formula applied

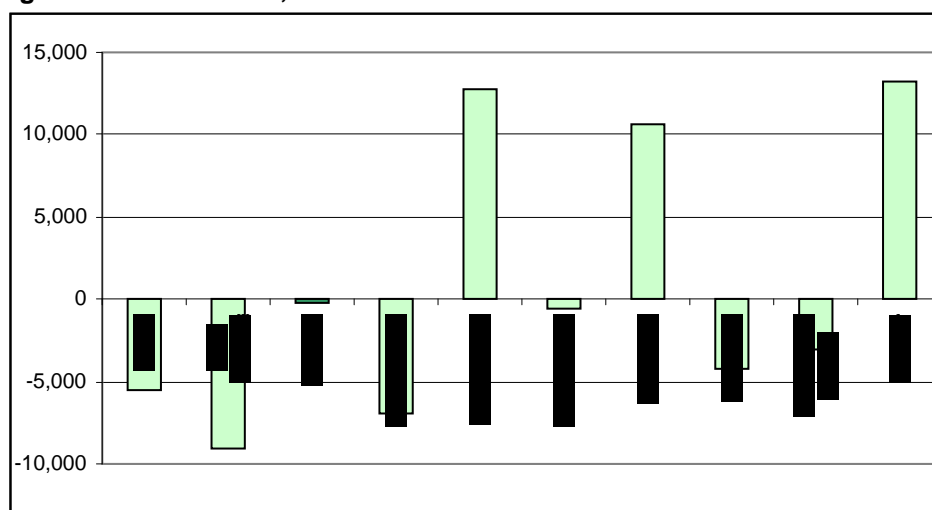


**Table 13.1: Commuting flows, 2001<sup>4</sup>**

	Living and working within	Living within but working outside	Living outside but working within	Net inflow
Kennet	23,165	14,415	8,938	-5,477
North Wiltshire	39,801	24,737	15,715	-9,022
<b>Salisbury</b>	<b>44,928</b>	<b>12,544</b>	<b>12,379</b>	<b>-165</b>
West Wiltshire	40,176	17,555	10,589	-6,966
Southampton	64,212	33,950	46,757	12,807
Bournemouth	46,721	25,625	25,073	-552
Winchester	31,700	21,600	32,243	10,643
Test Valley	33,429	23,717	19,442	-4,275
Basingstoke & Deane	55,355	27,294	24,226	-3,068
Swindon	79,769	14,137	27,372	13,235

Source: ONS Census 2001 © Crown Copyright, National Statistics website: [www.statistics.gov.uk](http://www.statistics.gov.uk), 2007

**Figure 13.1: Net inflow, 2001**



Source: ONS Census 2001 © Crown Copyright, National Statistics website: [www.statistics.gov.uk](http://www.statistics.gov.uk), 2007

<sup>4</sup> Data created through merging seven workplace travel Census tables (SWS101-SWS107). Reliability of figures is therefore an issue due to the estimation techniques used.

- 2.3** The Quarterly Economic Indicators report is produced to provide updated statistical information throughout the year. This is subject to availability as data for this report is often constrained due to its reliance on data release from reporting agencies such as the Office for National Statistics. This means that often data will not change from one report to the next. This report is only intended as a brief summary of the current economic situation throughout the year as a comprehensive Economic Assessment of Salisbury and south Wiltshire is produced on an annual basis. It is this annual assessment which provides comprehensive coverage and interpretation of all relevant economic data available and where possible gives an insight into possible trends and patterns for the area's economic future. This document would be used to inform Salisbury District Council's Economic Development Strategy, for strategic planning on a county level, by local businesses and organisations in their internal business plans, by potential inward investors and by other local policy makers and advisors as an empirical guide when considering policy responses.
- 2.4** From 2007 both the Economic Indicators and Economic Assessment reports have been produced by the Economic Intelligence team at Wiltshire County Council. They are a dedicated team of Intelligence experts who have access to all relevant sources of economic information. With WCC producing the reports the Economic Assessment contained, for the first time, a 'strategic guidance' section which draws together the headline issues contained in the report and provides recommendations where appropriate. This was the subject of the presentation made to the panel at the last meeting.
- 2.5** WCC Intelligence team also produce a Quarterly Economic Review on behalf of the Wiltshire Strategic Economic Partnership (WSEP). This report contains information on the Wiltshire economy and includes many similar statistics to those provided in the south Wiltshire report but on a national, regional, county and district level. The primary aim of this document is to make sure the latest economic data is made available to WSEP partners as soon as possible. Detailed analysis again is reserved for the annual WSEP Economic Assessment.

### **3 Quarterly Economic indicators – future delivery and format of reports**

- 3.1** WCC are contracted to provide one further quarterly indicators report in 2007, this will be distributed in December. Salisbury District Council Economic Development Officers will be negotiating provision of these reports and the annual Economic Assessment for 2008 in early December. At this point we will be able to discuss format, the potential to, and appropriateness of, providing additional analysis in the quarterly reports and the financial implications of doing so.

### **4 Recommendation(s):**

- (1) Members note this report and the contents of the September Quarterly Economic indicators report.

### **5 Background Papers:**

South Wiltshire Economic Indicators Report, September 2007

### **6 Implications:**

<b>Financial</b>	: None
<b>Legal</b>	: None
<b>Human Rights</b>	: Have been assessed and no human rights are affected by the content of this report.
<b>Personnel</b>	: The impact of scrutiny work is accommodated within existing resources.
<b>Community Safety</b>	: None
<b>Environmental</b>	: None
<b>Council's Core Values</b>	: Scrutiny of performance forms an integral part of the Council's corporate planning process and supports all of the core values.
<b>Equalities</b>	: None
<b>ICT</b>	: None
<b>Wards Affected</b>	: All