

South Wiltshire Economic Indicators Report

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

June 2008

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

South Wiltshire Quarterly Economic Indicators Review

June 2008

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

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EXECUTIVE SUMMARY

- The ONS 2006 mid-year estimates put the **Population** of Salisbury at 115,300. The district 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.
- Between October 2006 and September 2007, the **Employment rate** in the district was 82.9%, above the county, regional and national averages.
- The **Economic Activity rate** between October 2006 and September 2007 was 86.4% for Salisbury district, above the county, regional and national averages.
- **Unemployment** in May 2008 was low, at 0.8% (539 Claimants) it was below the county, regional and national averages.
- In May 2008, 523 **Job Vacancies** were notified to Jobcentre Plus. The largest requirement was for elementary occupations (jobs).
- In 2006, 25.8% of Salisbury's working age residents had **Qualifications** at NVQ Level 4 or above, below the regional and national averages.
- Resident median **Earnings** in Salisbury were £452 per week in 2007, higher than the South West but below the national average.
- In the first quarter of 2008, the **Average House Price** in Salisbury was. In 2007, average house prices in the district were more than 11 times median earnings.
- **Commercial Property**- the availability of both office and industrial space increased between February 2007 and February 2008. In February 2008, the office space available in the district represented around 22.1% of all available space in the county; the industrial space available represented around 15.8%. Average commercial rents for office premises increased whilst industrial premises saw a decrease in average rents.
- In 2006, there were 4,510 VAT registered businesses in Salisbury. There were 395 new **VAT registrations** in 2006.
- In 2006, the average spend per staying visitor was £56.89. The average spend per day visitor was £18.80.
- Footfall in the city saw a significant increase in September 2006 only to fall dramatically in November. In December 2006, the average footfall 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

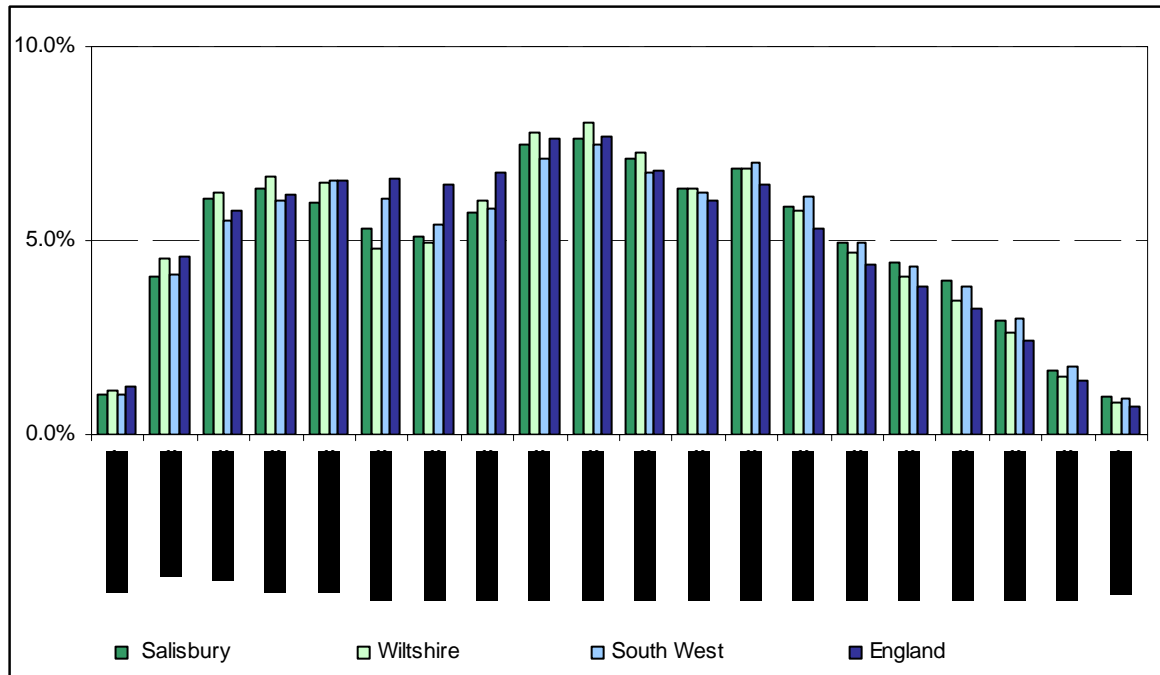
The ONS 2006 mid-year population estimates show that Salisbury had a population of 115,300. Table 1.1 shows the proportion of the total population in each age group for Salisbury district. Figure 1.1 shows the proportion of the total population in each age group for Salisbury district and benchmark areas. 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, 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, 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 October 2006 to September 2007, for Salisbury and surrounding areas. The employment rate in the district was 82.9%, representing around 54,600 people. The employment rate in Salisbury was above the county, regional and national averages (79.9%, 78.5% and 74.3% respectively) and higher than all of the other districts in Wiltshire. The district performed favourably compared to Southampton (72.6%), Bournemouth (75.9%) and Winchester (79.8%), whilst employment rates in Test Valley were higher at 86.6%.

Table 2.1: Employment Rate, October 2006 to September 2007

Employment Rate	
Great Britain	74.3
South West	78.5
Kennet	76.4
North Wiltshire	81.9
Salisbury district	82.9
West Wiltshire	77.3
Test Valley	86.6
Winchester	79.8
Bournemouth	75.9
Wiltshire	79.9
Southampton	72.6

Source: Annual Population Survey, National Statistics from NOMIS website: www.nomisweb.co.uk, 2008

Table 2.2 combines data from the Labour Force Survey (LFS) and the Annual Population Survey (APS) to show the employment 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 had increased by 1.3 percentage points in the last year.

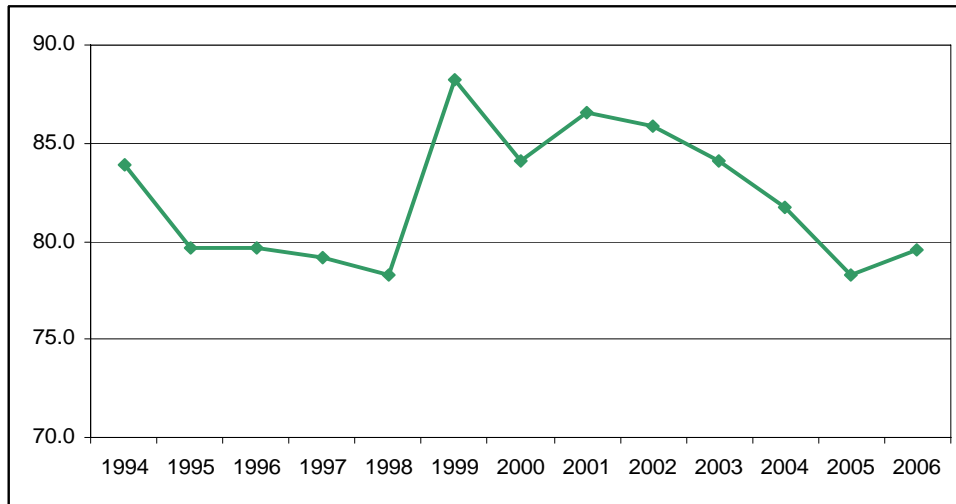
Table 2.2: Employment Rate, Salisbury district, 1994 to 2006

	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, 2007

Figure 2.1 shows the employment rate over this same period 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, 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 that during the period October 2006 to September 2007 the economic activity rate in Salisbury district was 86.4%, representing around 56,900 people. The economic activity rate in the district was above the county, regional and national averages (82.6%, 81.7% and 78.6% respectively). Salisbury had the highest activity rate of all the Wiltshire districts and the rate was also higher than Southampton (77.9%), Bournemouth (78.5%) and Winchester (82.4%). Economic activity rates in Test Valley (88.3%) were higher than those experienced in the district.

Table 3.1: Economic Activity Rate, October 2006 to September 2007

Economic Activity Rate	
Great Britain	78.6
South West	81.7
Kennet	77.9
North Wiltshire	85.1
Salisbury district	86.4
West Wiltshire	79.5
Test Valley	88.3
Winchester	82.4
Bournemouth	78.5
Wiltshire	82.6
Southampton	77.9

Source: Annual Population Survey, National Statistics from NOMIS website: www.nomisweb.co.uk, 2008

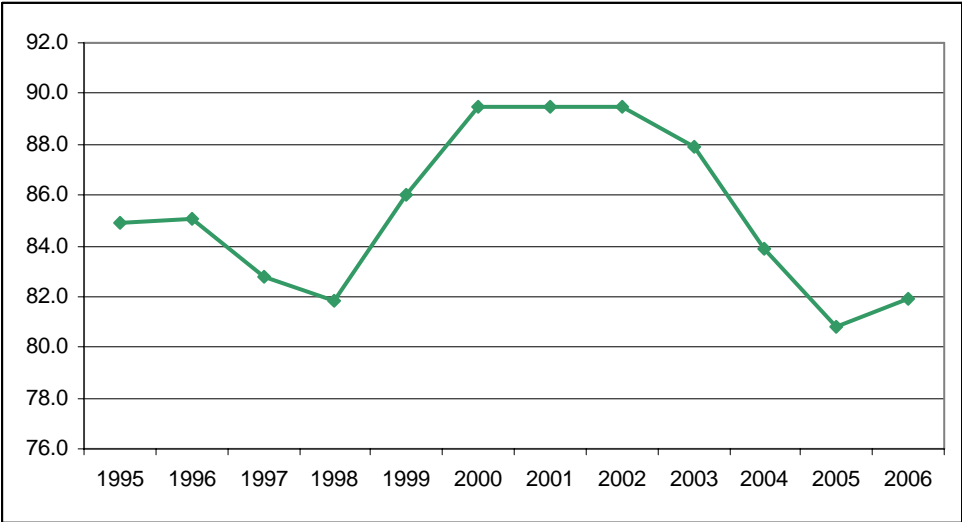
Salisbury’s economic activity rate has fluctuated between 1995 and 2006. The rate reached its highest level (89.5%) between 2000 and 2002. However, since then the rate declined markedly and reached 80.8% in 2005, however by 2006 the rate had increased marginally to 81.9%. (Table 3.2 and Figure 3.1)

Table 3.2: Economic Activity Rate, Salisbury district, 1995 to 2006

	Economic Activity Rate	Number Economically Active
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, 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, 2007

4. Unemployment

There are two main measures of unemployment frequently used, the Claimant Count and an estimate based on the definition of unemployment adopted by the International Labour Organisation (ILO). 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). Subsequently, Claimant rates increased slightly, in line with the national trend. However, Salisbury's claim rate still remains well below the regional and national averages. Table 4.1 shows how the numbers and rates have fluctuated over the more recent past and remained relatively constant from May 2007 through to May 2008.

Table 4.1: Claimant Count Rate, Salisbury district, May 07 to May 08

	Number of JSA Claimants	JSA Claimant Rate
May 2007	528	0.8
June 2007	479	0.7
July 2007	475	0.7
August 2007	496	0.7
September 2007	489	0.7
October 2007	458	0.7
November 2007	453	0.7
December 2007	462	0.7
January 2008	484	0.7
February 2008	519	0.8
March 2008	503	0.7
April 2008	517	0.8
May 2008	539	0.8

Source: Claimant Count, National Statistics from NOMIS website: www.nomisweb.co.uk, 2008

Table 4.2 shows the Claimant Count rate for Salisbury and surrounding areas. In May 2008, the Claimant Count rate in Salisbury district was 0.8%, unchanged compared to the rate in the same period ending a year earlier. The rate in the district was below the county, regional and national averages (1.0%, 1.3% and 2.2% respectively). Kennet (0.7%) was the only Wiltshire district to have a Claimant Count rate below that of Salisbury. Claimant rates in West Wiltshire (1.5%), Bournemouth (1.7%) and Southampton (2.2%) were significantly higher than those in Salisbury district.

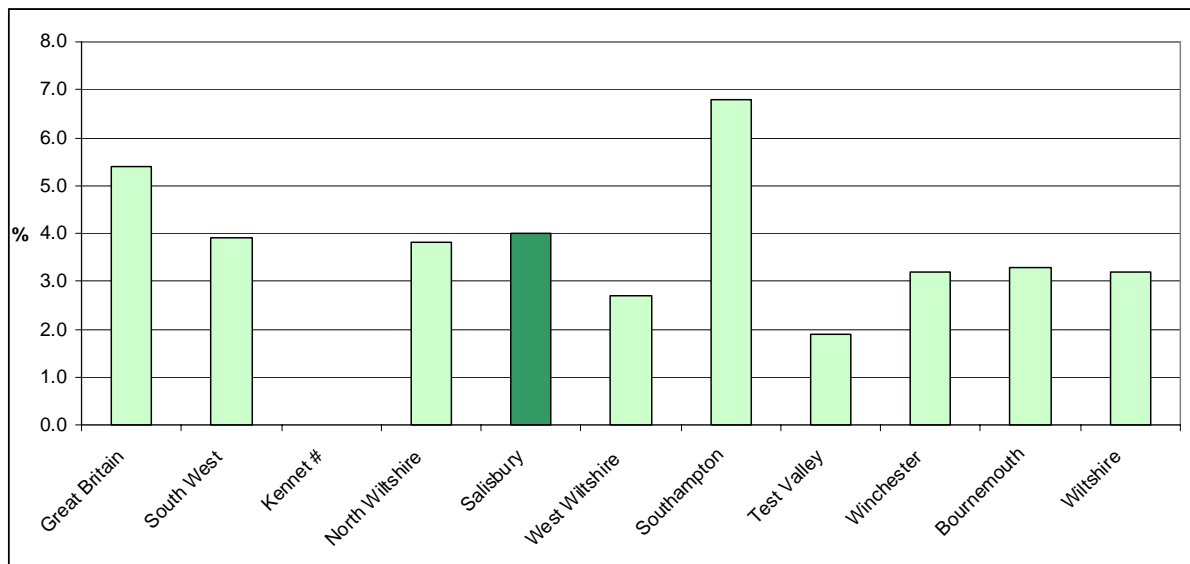
Table 4.2: Claimant Count, May 2007 to May 2008

	May 2007	Feb 2008	March 2008	April 2008	May 2008
Great Britain	2.4	2.3	2.2	2.2	2.2
South West	1.4	1.4	1.3	1.3	1.3
Kennet	0.8	0.7	0.7	0.7	0.7
North Wiltshire	1.1	0.9	0.9	0.9	0.9
Salisbury	0.8	0.8	0.7	0.8	0.8
West Wiltshire	1.2	1.3	1.4	1.5	1.5
Test Valley	0.9	0.7	0.7	0.8	0.8
Winchester	0.9	0.8	0.8	0.8	0.8
Bournemouth	1.7	1.7	1.7	1.7	1.7
Wiltshire	1.0	0.9	1.0	1.0	1.0
Southampton	2.2	2.1	2.1	2.2	2.2

Source: Claimant Count, National Statistics from NOMIS website: www.nomisweb.co.uk, 2008

The International Labour Organisation's (ILO) definition of unemployment includes any person looking for work, whether or not they are claiming Jobseekers Allowance. The APS provides an estimate of ILO unemployment; however, at smaller geographies the estimate provided may be less reliable.

Figure 4.1: ILO Unemployment Rate, October 2006 to September 2007 ¹



Data for Kennet district have been excluded since the estimates are unreliable

Source: Annual Population Survey, National Statistics from NOMIS website: www.nomisweb.co.uk, 2008

¹ These ILO unemployment estimates are taken from the APS, however, unemployment rates and levels for districts and unitary authorities are also available from the ONS model-based estimates which provide a more precise measure. For further details go to <http://www.statistics.gov.uk/STATBASE/Product.asp?vlnk=13574>

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 market share will always be inexact but recent estimates from surveys suggest that it is between a third and a half. Between May 2007 and May 2008, the number of vacancies notified to Jobcentres in Salisbury varied greatly. The largest number of these vacancies (775) were reported in September 2007, the smallest number of vacancies (393) were reported in January 2008 (Table 5.1).

Table 5.1: Jobcentre Plus Vacancies, May 2007 to May 2008

Date	Total Number of Vacancies Notified
May 2007	686
June 2007	627
July 2007	447
August 2007	589
September 2007	775
October 2007	736
November 2007	645
December 2007	691
January 2008	393
February 2008	725
March 2008	631
April 2008	563
May 2008	523

Source: Jobcentre Plus Vacancies, National Statistics from NOMIS website: www.nomisweb.co.uk, 2008

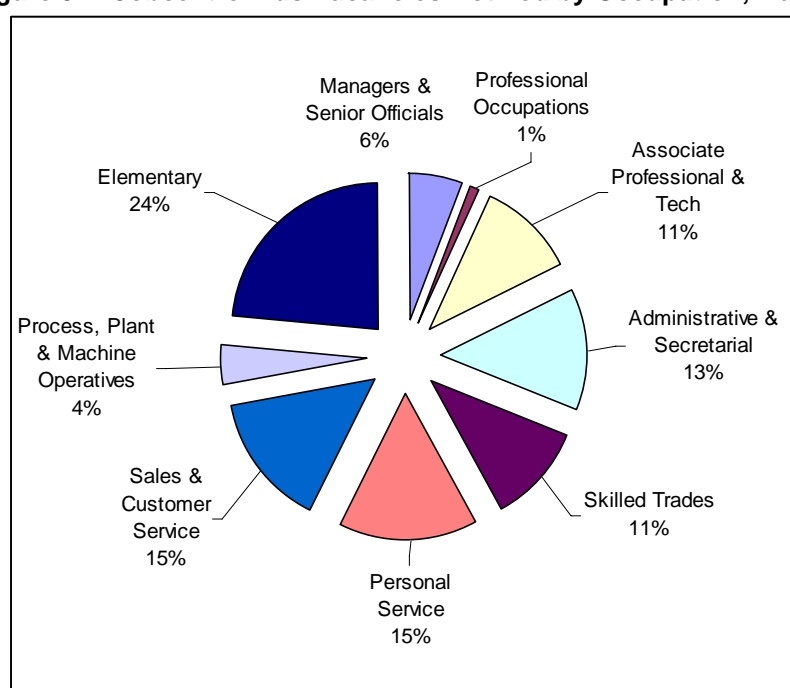
Table 5.2 shows the Jobcentre plus vacancies notified by occupation between May 2007 and May 2008. In May 2008 there were 523 vacancies notified to Jobcentre plus, lower than the number of vacancies (686) reported in the same quarter ending a year earlier. The largest requirement was for Elementary occupations (124 jobs). Personal Service (79 jobs), Sales & Customer Service (77 jobs) and Administrative & Secretarial occupations (69 jobs) also had significant levels of vacancies. Skilled Trade occupations experienced the largest fall in share of vacancies notified, whilst Administrative & Secretarial occupations experienced the largest increase in the share of vacancies notified.

Table 5.2: Jobcentre Plus Vacancies Notified by Occupation, May 2007 to May 2008

	May 2007		May 2008	
	Number of Vacancies	%	Number of Vacancies	%
Managers & Senior Officials	26	3.8	30	5.7
Professional	18	2.6	6	1.1
Associate Professional & Tech	107	15.6	57	10.9
Administrative & Secretarial	50	7.3	69	13.2
Skilled Trades	112	16.3	58	11.1
Personal Service	87	12.7	79	15.1
Sales & Customer Service	71	10.3	77	14.7
Process, Plant and Machine Operatives	47	6.9	23	4.4
Elementary	168	24.5	124	23.7
Total	686	-	523	-

Source: Jobcentre Plus Vacancies, National Statistics from NOMIS website: www.nomisweb.co.uk, 2008

Figure 5.1: Jobcentre Plus Vacancies Notified by Occupation, May 2008



Source: Jobcentre Plus Vacancies, National Statistics from NOMIS website: www.nomisweb.co.uk, 2008

6. Qualifications

The Leitch report (2004) emphasised the need for increased skill levels. The report stated that low level skills can be a deterrent to increasing productivity and growth. Table 6.1 shows that in 2006, around 25.8% (17,500) of 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
Salisbury	25.8	19.6	14.8	16.6	6.1	11.2

Source: Annual Population Survey, National Statistics from NOMIS website: 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, 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 2007 were £452 per week, above the regional average (£433) but marginally below the national average (£459). Weekly resident earnings in the district were second lowest of all the Wiltshire districts, but were higher than resident earnings in both Bournemouth (£414) and Southampton (£421). In contrast, weekly workplace based earnings in Salisbury (£428) were on a par with the regional (£428) average but remained below the national (£459) average. Workplace based earnings in Salisbury were the second highest of the all the Wiltshire districts, above earnings in both Kennet (£362) and West Wiltshire (£396). However, weekly workplace based earnings in the district were still significantly below neighbouring areas such as Southampton (£492) and Winchester (£542).

Table 7.1: Median weekly earnings (£, full time), 2007

	Resident	Workplace
Great Britain	459.0	458.6
South East	499.6	480.7
South West	433.4	427.8
Kennet	440.1	361.8
North Wiltshire	515.7	486.2
Salisbury	451.9	427.7
West Wiltshire	485.6	396.0
Test Valley	467.3	444.6
Winchester	591.3	542.6
Southampton	420.7	492.0
Bournemouth	414.0	403.3
Wiltshire	474.3	435.1

Source: ASHE, National Statistics from Nomis website:
www.nomisweb.co.uk, 2007

Table 7.2 shows the mean annual earnings trend by workplace and residence for Salisbury for full-time employees. From 2007 the Annual Survey of Hours and Earnings has experienced slight methodology changes to improve the quality of results and it is therefore not entirely consistent with previous surveys. Data for 2006 has been re-worked under the new methodology and is also contained in the tables below. Annual workplace earnings have risen significantly from £19,261 in 1999 to £26,679 in 2007². Annual earnings for residents have also risen over the period 2002 to 2007 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.

² 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%.

Table 7.2: Average Earnings (£, full time), Salisbury district, 1999-2007³

	Workplace Earnings Annual £	Resident Earnings Annual £	
Old Methodology	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
New Methodology	2006	26,948	27,357
	2007	26,679	28,225

Source: ASHE, National Statistics from Nomis website: 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 2007, median annual earnings for residents were £23,614, compared to £22,890 for those who worked in Salisbury.

Table 7.3: Median Earnings (£, full time), Salisbury district, 1999 to 2007³

	Workplace Earnings Annual £	Resident Earnings Annual £	
Old Methodology	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
New Methodology	2006	21,455	22,181
	2007	22,890	23,614

Source: ASHE, National Statistics from Nomis website: www.nomisweb.co.uk, 2007

³ 2007 results take account of a small number of methodological changes which will improve the quality of results. These include changes to the sample design itself, as well as the introduction of an automatic occupation coding tool, ACTR. Therefore these results are only consistent with the 2006 results that have been produced using this methodology and are not consistent with results from previous years. In addition to the changes noted above; the sample size of the 2007 ASHE has been reduced by almost 20 per cent. ASHE results for 2007 are based on approximately 142,000 returns, down from 175,000 in 2006. The impact of this change has been minimised by reducing the sample in an optimal way, with the largest sample reductions occurring in industries where earnings are least variable.

8. Residential Property

In the first quarter of 2008 the average house price in Salisbury district was £255,730. The average price for a detached property in the district was £365,777, whilst semi-detached properties cost on average around £226,163. The cost of an average terraced property in Salisbury remained higher than in any of the other Wiltshire districts. Overall, average house prices in Salisbury remained higher than average house prices in Bournemouth and Southampton, but lower than the average price for properties in Test Valley and Winchester.

Table 8.1 shows the average house price trend between 2002 and 2007. Over this period house prices have continued to grow, but the rate at which they did so has begun to slow down. A slight recovery in house price growth is seen between 2006 and 2007 when house prices grew by 10.4%. In 2002, the earnings to house price ratio was 1:9, but, by 2004 this had risen to 1:11 and by 2007 this had risen further to 1:12. This demonstrates that house prices in the district have been rising faster than earnings.

Table 8.1: Earnings: House prices ratio, 2002 to 2007⁴

	Average house price (£)	% increase in house prices	Resident median annual earnings	Earnings: House price ratio
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
2007	273,199	10.4	23,614	12

Source: Residential Property Price Data, Land Registry, ASHE, National Statistics from Nomis website: www.nomisweb.co.uk, 2007

In 2007, Winchester (£349,268) had the highest average house price of all benchmark areas. Kennet (£281,279) and Test Valley (£283,400) also had average house prices higher than those in Salisbury (£273,199). As stated, the district had a wage:house price ratio which showed that average house prices in Salisbury were nearly 12 times median earnings, which was on a par with ratios experienced in Kennet and Winchester.

⁴ 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

Table 8.2: Earnings: House prices ratio, 2007⁴

	Average house price (£) 2007	Median Earnings (£) 2007	Wage: House Price ratio
England & Wales	219,853	24,242	1:9
South East	261,970	26,478	1:10
South West	229,684	22,966	1:10
Wiltshire	243,430	24,759	1:10
Kennet	281,279	22,916	1:12
North Wiltshire	240,040	27,835	1:9
Salisbury	273,199	23,614	1:12
West Wiltshire	205,042	25,376	1:8
Test Valley	283,400	25,644	1:11
Southampton	177,231	22,006	1:8
Winchester	349,268	29,949	1:12
Bournemouth	222,616	21,914	1:10

Source: Residential Property Price Data, Land Registry, ASHE, National Statistics from Nomis website: www.nomisweb.co.uk, 2007

9. Commercial Property

The data in this section are 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 February 2007 – February 2008, the overall availability of office floorspace within Wiltshire increased by 24% from a total of 717,806 sq ft to 890,403 sq ft; with the number of available units falling from 166 to 140. At District level, a decline in the availability of office floorspace was seen in Kennet (-34%) and West Wiltshire (-9%), while an increase in availability of floorspace was seen in North Wiltshire (36%) and Salisbury (73%).

The significant increase in office floorspace availability seen in Salisbury is largely due to a large property of 66,000 sq ft becoming available in Amesbury at Solstice Park. Turnover in the market in Salisbury remained dynamic, with around 40 properties coming off the market and 20 coming onto the market in that period.

Overall, in February 2007 there were 166 properties on the market and a total floorspace of 717,806 sq ft, compared to only 140 properties in February 2008 and a total of 890,403 sq ft, so overall a fall in the number of units but an increase in total floorspace, meaning an increase in the number of larger units being available, though this will have been affected by the large amount of space available at Solstice Park.

Table 9.1: Office Availability, Wiltshire, February 2007 to February 2008

Area	February 2007 Sq Ft	% of all office space available	February 2008 Sq Ft	% of all office space available
North Wiltshire	341,624 sq ft (57)	47.6	465,491 sq ft (60)	52.3
Kennet	42,027 sq ft (18)	5.9	27,619 sq ft (10)	3.1
West Wiltshire	220,033 sq ft (46)	30.6	200,349 sq ft (33)	22.5
Salisbury	114,122 sq ft (45)	15.9	196,944 sq ft (37)	22.1
Wiltshire	717,806 sq ft (166 units)	-	890,403 sq ft (140 units)	-

Source: Evolutive, Wiltshire County Council, 2007

Industrial Premises

Between February 2007 and February 2008, the number of industrial units available across Wiltshire fell by 33% from 309 to 207, with total available industrial floorspace falling from 1,705,997 sq ft to 1,240,630 sq ft. At District level, the availability of industrial floorspace fell across the county, but most markedly in Kennet (-77%) and West Wiltshire (-43%). Floorspace available in Salisbury fell by 30% and in North Wiltshire by 15%.

In Salisbury 36,000 sq ft was taken up at Minton Distribution Park in Amesbury and 14,000 sq ft at the Dolphin Trading Estate in Salisbury.

Table 9.2: Industrial Availability, Wiltshire, February 2007 to February 2008

Area	February 2007 Sq Ft	% of all industrial space available	February 2008 Sq Ft	% of all industrial space available
North Wiltshire	895,089 sq ft (115)	53.0	758,907 sq ft (92)	63.4
Kennet	137,424 sq ft (31)	8.1	30830 sq ft (14)	2.6
West Wiltshire	384,796 sq ft (83)	22.8	217,844 sq ft (36)	18.2
Salisbury	270,989 sq ft (70)	16.0	188,640 sq ft (43)	15.8
Wiltshire	1,688,298 sq ft (299) units)	-	1,196,221 sq ft (185 units)	-

Source: Evolutive, Wiltshire County Council, 2007

Employment Land

In the period February 2007 to February 2008, employment land availability across Wiltshire fell by 5.5% from 148.71 acres to 140.57 acres, with the total number of sites declining from 16 in February 2007 to 14 in February 2008. At District level, there was no change in Kennet with only one piece of land available. Availability declined in North Wiltshire by 39%, in West Wiltshire by 11% and increased marginally in Salisbury district by 0.5%.

In Salisbury an 8.5 acre site at Harnham Business Park in Salisbury exited the market, while two old school sites became available; 3.7 acres on Highbridge Avenue and 5.4 acres at Pembroke Park, both in Salisbury.

Table 9.3: Employment Land Availability, Wiltshire, February 2007 to February 2008

Area	February 2007	February 2008
	Acres	Acres
North Wiltshire	17.2 (4 sites)	10.5 (3 sites)
Kennet	2.5 (1 site)	2.5 (1 site)
West Wiltshire	17.5 (6 sites)	15.5 (4 sites)
Salisbury	111.5 (5 sites)	112.1 (6 sites)
Wiltshire	148.7 (16 sites)	140.6 (14 sites)

Source: Evolutive, Wiltshire County Council, 2007

Average Commercial Rents

During the period February 2007 to February 2008, average commercial rents for office premises in Trowbridge rose by 20% from £9.77 per sq ft to £11.17 per sq ft. This was due to two properties with rents of less than £8 per sq ft being taken up and a property at Pentagon House coming on to the market at £15.51 per sq ft.

In Salisbury rents rose by 4% from £9.26 per sq ft to £9.59 per sq ft. In Chippenham they decreased from £10.84 to £9.95 (-8%) and in Devizes they decreased from £7.37 to £6.22 (-16%).

With respect to average commercial rents for industrial premises across the period February 2007 to February 2008, Devizes and Salisbury witnessed declines and Trowbridge and Chippenham saw rents increase. Average commercial industrial rents fell by 5.7% in Salisbury (from £6.49 per sq ft to £6.12 per sq ft). Overall, across the county the average increased slightly from £5.61 to £5.75 per sq ft.

Table 9.4: Average Commercial Rents, Wiltshire, (£ per sq. ft per annum)

Area	Dec 06/Jan/Feb 07		Dec 07/Jan/Feb 08	
	Office	Industrial	Office	Industrial
Chippenham	£10.84 (14)	£6.23 (26)	£9.95 (6)	£6.70 (18)
Devizes	£7.37 (7)	£5.71 (13)	£6.22 (5)	£5.61 (8)
Salisbury	£9.26 (24)	£6.49 (26)	£9.59 (28)	£6.12 (27)
Trowbridge	£9.77 (11)	£4.00 (7)	£11.17 (4)	£4.58 (5)

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 2006 the stock of businesses in Salisbury increased, with the largest growth in stocks being seen between 1996 and 2000 (Table 10.1). In 2006, there were 4,510 VAT registered businesses in Salisbury, with 395 new businesses registering, whilst 315 businesses de-registered over the year. The number of registrations in Salisbury had reduced slightly since its peak in 1998. In 2006 there were 34.3 registrations per 10,000 population, compared to 37.2, in North Wiltshire, 33.2 in Kennet and 32.9 in West Wiltshire. (Table 10.1)

Table 10.1: VAT Registrations, De-registrations and Stocks, 1994 to 2006

Date	Registrations	De-registrations	Stocks at end of year	Net-change
1994	370	325	3,800	45
1995	320	315	3,805	5
1996	375	280	3,895	95
1997	405	325	3,980	80
1998	425	320	4,080	105
1999	400	335	4,145	65
2000	395	315	4,225	80
2001	370	365	4,225	5
2002	380	335	4,275	45
2003	385	365	4,300	20
2004	365	305	4,360	60
2005	355	285	4,430	70
2006	395	315	4,510	80

Source: VAT Registrations and De-Registrations, National Statistics from Nomis website: www.nomisweb.co.uk, 2006

11. Tourism

Table 11.1 and 11.2 present data relating to tourism visits during 2002, 2004 and 2006. Table 11.2 shows that, in 2006 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>	Salisbury 2002	Salisbury 2004	Salisbury 2006	Historic towns 2006	All destinations 2006
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
Total average spend	£42.74	£42.72	£56.89	£65.63	£65.57

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

Table 11.2 shows that Day visitors to Salisbury spent an average of £18.80 per person per day, 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>	Salisbury 2002	Salisbury 2004	Salisbury 2006	Historic towns 2006	All destinations 2006
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
Total average spend	£22.78	£14.69	£18.80	£23.82	£24.87

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 for previous years due to improvements in the footfall measuring procedure.

Table 12.1: Hourly average footfall per month, Salisbury, by street, 2006⁵

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
Total	131,766	139,586	109,996	139,682	114,369	108,810	128,885	120,557	161,511	159,530	89,978	132,879

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, the gravitational pull of jobs in urbanised areas and the 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)

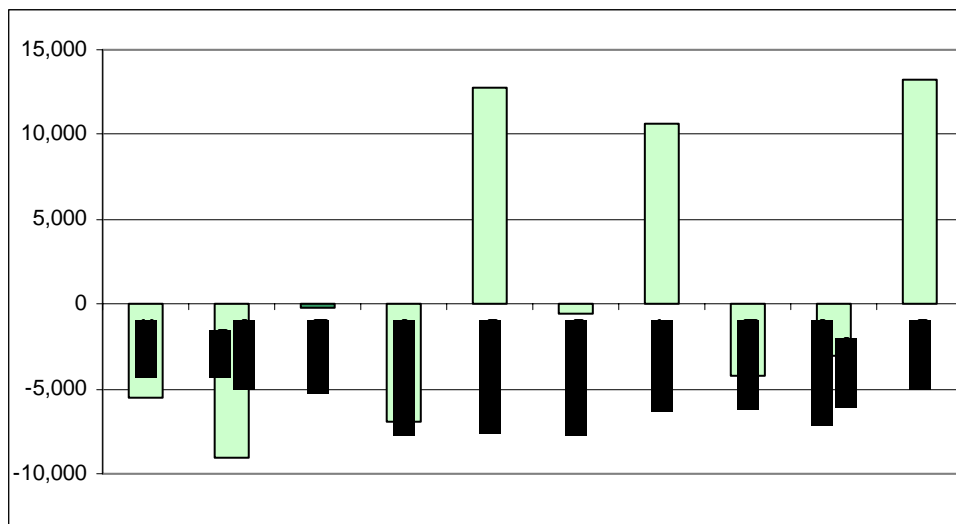
⁵ Figures are based on three 10 minute counts taken at each location each month. The average is then taken and the British Retail Consortium Footfall formula applied

Table 13.1: Commuting flows, 2001⁶

	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
Salisbury	44,928	12,544	12,379	-165
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, 2007

Figure 13.1: Net inflow, 2001



Source: ONS Census 2001 © Crown Copyright, National Statistics website: www.statistics.gov.uk, 2007

⁶ Data created through merging seven workplace travel Census tables (SWS101-SWS107). Reliability of figures is therefore an issue due to the estimation techniques used.