



Wiltshire and Swindon Economic Partnership

Quarterly Economic Review July 2005

Prepared by
The Economic Intelligence Unit
Wiltshire County Council
For



QUARTERLY ECONOMIC REVIEW

JULY 2005

Welcome to the first edition of Wiltshire & Swindon's Quarterly Economic Review for July 2005, produced by the Economic Intelligence Unit, Wiltshire County Council. It forms part of a series of reviews that are intended to provide information on Wiltshire & Swindon's economy. In addition to providing you with a source of economic statistics¹², we have included local economic development news provided by the WSEP partners. We hope you find this publication useful and would appreciate any feedback that you may have. Items in the July 2005 issue include:

- National developments
- Population
- Employment
- Economic activity
- Unemployment
- Average earnings
- Property
- Agriculture & horticulture
- Education attainment
- Job losses & gains
- Local economic development news

Some of the items summarise larger datasets so should you require more detailed Information please contact the Economic Intelligence Unit at Wiltshire County Council, Environmental Services, County Hall, Bythesea Road, Trowbridge, Wiltshire BA14 8JN:

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¹ Every effort has been made to provide the most recently available statistical information at the time of writing.

² This document will contain certain key economic indicators in every issue. The indicators that are released on an annual basis will be included in the quarterly reviews as and when they are made available. It is intended to include, whenever possible and if appropriate, information for the following geographies: national; regional; county/borough; and districts, as well as comparative information from the previous four quarters.

NATIONAL DEVELOPMENTS

Several issues have dominated the UK agenda over the past few months: a slight rise in inflation; restrained economic growth; subdued consumer spending; and the slowdown in the housing market.

The housing market, which was one of the key drivers of economic success in the last decade, began to run out of steam in the second half of last year. In March 2005 91,000 house purchase mortgages were approved, which is a quarter less than the year before. Many potential sellers who are unwilling to accept the new lower house prices are holding on to their properties thereby adding to the general sluggishness of the market. However, in spite of the fact that prices have fallen, the general feeling is that the property market is stagnant rather than heading for 'crash'.

Shortly after the downturn in the housing market in 2004, consumers began to curb their spending. Consumer spending, which accounts for around 2/3rds of GDP (Gross Domestic Product) and has underpinned economic growth in the last few years, is now subdued. This slowdown has even spread to consumer services; the CBI reported that business volumes fell for the first time in 18 months in the past quarter. Even consumer firms such as cinemas and travel agents are feeling the pinch.

The Office for National Statistics reported that manufacturing output decreased by 1.4% in the 3 months leading up to April compared to the previous quarter. Eleven of the thirteen sub sectors showed decreases in output. Distribution output increased by 0.1% during the same period; the increase in the wholesale trades was partially offset by a fall in the retail trades. Output from the motor trades remained the same.

Although the economy has slowed down – the economy grew by just 0.4% in the first three months of the year - a sense of perspective is required since there is no indication that we are seeing the start of a recessionary period; so far, there is nothing too 'sinister' to report. Inflation has risen to a seven year high but at 1.9% is still below the Government's HCIP (Harmonised Index of Consumer Prices) target of 2%. Interest rates, despite having risen over the past year, are still at relatively low levels compared to the last thirty years.

Although there are no signs that the economic climate is heating up, the general consensus is that what we are seeing is the beginning of a deceleration of economic growth rather than the start of a recession.

POPULATION

This section contains population estimates produced by Wiltshire County Council and Swindon Initiative.

Population growth across Wiltshire has exceeded the national average of 1.23% between 2001 and 2004. West Wiltshire has seen particular growth both in terms of households (5.02%) and population (4.59%) whilst Salisbury District remains much in line with the national average. This population growth can be largely accounted for by the extensive construction of dwellings in the Trowbridge Community Area, principally at Paxcroft Mead. This new source of housing has attracted families into the District, and aided this population expansion. North Wiltshire and Kennet both had increases above the national average. Swindon has increased its population by 3,400 which represents a percentage increase of 1.89%, also above the national average. The number of dwellings in Swindon increased in by 4% and the number of households by 4.11% (Table 1). A map displaying the population growth (%) changes of Wiltshire's Community Areas plus Swindon can be found in Appendix 1.

Table 1: Population Estimates

Area	2001			2004		
	Dwellings	Households	Population	Dwellings	Households	Population
Swindon	77,500	75,400	180,100	80,600	78,500	183,500
Wiltshire	183,950	177,030	433,510	189,940	183,000	445,150
Kennet	31,350	29,640	74,920	32,440	30,710	76,580
North Wilts	52,130	50,370	125,430	53,610	51,760	128,070
Salisbury	49,240	47,480	114,670	50,110	48,500	116,580
West Wilts	51,240	49,540	118,480	53,770	52,030	123,920

Source: Population Estimates 2004, Wiltshire County Council & Swindon Borough Council, April 2005

LABOUR MARKET

This section provides an overview of headline key labour market indicators in order to gauge the level of employment and economic activity in Wiltshire and Swindon, benchmarked against regional and national averages. The indicators used are: employment rate; unemployment rate; and economic activity rate.

Employment

The employment rate is defined as the proportion of an economy's working age population that is in employment. It provides an indication on the level of engagement the area's residents are having in the labour market and the ability of an economy to create jobs. The Labour Force Survey's (LFS) March 2004 to February 2005 figures show that with 80.8% and 83.5% respectively, Wiltshire and Swindon had higher employment rates than the regional and national averages (Table 2). Of the four Wiltshire districts, Salisbury enjoyed the highest employment rate with a remarkable 86.5%. North Wiltshire is the district with the lowest figure (77.2%); however, it is still higher than the national average of 75%. In terms of employment rate changes, the LFS shows that from March 2004 to February 2005 Swindon's employment rate was slightly higher than in the previous 12 month period. Wiltshire, on the other hand, now has a slightly lower figure. Most of this decline can be attributed to the district of North Wiltshire which had an employment rate of 83.4% from March 2003 to February 2004 and now has an employment rate of 77.2%.

Table 2: Employment Rate of Working Age Population

Area	Mar 2003 - Feb 2004	Jun 2003- May 2004	Sep 2003- Aug 2004	Dec 2003- Nov 2004	Mar 2004- Feb 2005
Great Britain	74.8	74.8	74.9	74.9	75.0
South West	78.8	78.8	78.9	78.7	78.6
Wilts & Swindon	81.4	80.9	80.9	80.8	81.6
Swindon	81.5	81.3	81.9	83.0	83.5
Wiltshire	81.4	80.7	80.5	79.9	80.8
Kennet	78.8	78.4	77.8	78.1	80.3
North Wiltshire	83.4	82.2	79.9	78.1	77.2
Salisbury	85.0	83.9	84.6	85.1	86.5
West Wiltshire	77.1	77.0	78.5	78.0	79.7

Source: Quarterly Labour Force Survey³, NOMIS 2005.

Economic Activity

The economic activity rate is a good indicator of the health of the labour market in an area. Persons are economically active if they are either employed or unemployed in a particular period. Economically active people can thus be defined as those who supply or want to supply their labour to produce goods and services for the economy. The rates are calculated by expressing the number of persons in the labour force (the labour force is the sum of employed and unemployed persons) as a percentage of the working age population. Table 3 shows that in the period March 2004 to February 2005 Wiltshire and Swindon had higher employment rates than the regional and national averages. Of the four Wiltshire districts, Salisbury enjoyed the highest economic activity rate with an impressive 88.0%. West Wiltshire is the district with the lowest figure (81.5%); however, it is still higher than the national average of 78.7%. The economic activity rates of Wiltshire and Swindon are higher than in the previous 12 month period. This trend was echoed across all the districts except for North Wiltshire.

The drop in North Wiltshire's economic activity rate is obviously mirrored in the higher economic inactivity rate of working age people that this area recorded in the period March 2004 to February 2005 when compared to the previous 12 month period. Economic inactivity is also a labour supply side indicator because each economically inactive person can potentially move into the labour market at some point. The economically inactive consists of those people who are out of work but are either not seeking work or are unavailable to start work (i.e. students, looking after family or home, long term sick and disabled, temporarily sick or injured, retired early, discouraged workers). North Wiltshire is the only Wiltshire & Swindon sub regional area that had a higher economic inactivity rate from March 2004 to February 2005 than in the preceding 12 months. The reasons behind this development is as yet unclear so for the time being it would be best to monitor the employment/economic activity rates in North Wiltshire before drawing conclusions about the state of this area's labour market supply.

³ The labour force survey (LFS) is a quarterly sample survey carried out by interviewing people about their circumstances and work. It is the biggest regular household survey in this country and provides a source of information about labour force using internationally agreed concepts and definitions. However, like any survey, the results should be seen as an approximation rather than an exact figure. The quarterly LFS dataset on Nomis is not seasonally adjusted.

Table 3: Economic Activity Rate of Working Age Population

Area	Mar 2003- Feb 2004	Jun 2003- May 2004	Sep 2003- Aug 2004	Dec 2003- Nov 2004	Mar 2004- Feb 2005
Great Britain	78.8	78.8	78.7	78.7	78.7
South West	81.5	81.5	81.5	81.4	81.4
Wilts & Swindon	84.6	84.1	84.1	84.1	84.5
Swindon	85.8	86.0	86.2	86.5	86.2
Wiltshire	84.0	83.3	83.1	83.0	83.8
Kennet	81.3	79.8	80.3	82.2	84.5
North Wiltshire	85.9	84.8	83.3	82.2	82.0
Salisbury	87.9	87.8	87.5	87.7	88.0
West Wiltshire	79.8	79.2	80.1	79.8	81.5

Source: Quarterly Labour Force Survey, NOMIS 2005

Unemployment

The claimant count is based on the number of people claiming Jobseeker's Allowance (JSA) and is taken from monthly records. People claiming JSA must declare they are out of work, available for, capable of and actively seeking employment during the week in which the claim was made. Claimant count rates express the number of JSA claimants as a percentage of working age people in an area. Table 4 reveals that in April 2005 Swindon (2.1%) had a higher claimant count rate than Wiltshire (0.8%) although it was just under the national rate of 2.4%. West Wiltshire is the district with the highest claimant count rate with 1.0% although this figure is still lower than the national rate. Claimant count rates in Wiltshire and Swindon have remained relatively unchanged in the last 12 months, a sign that they have probably levelled off. A map displaying claimant count changes in Wiltshire & Swindon wards can be found in Appendix 2.

Table 4: Claimant Count Rates

Area	April 2004	Jan 2005	Feb 2005	Mar 2005	Apr 2005
Great Britain	2.4	2.4	2.4	2.4	2.4
South West	1.5	1.5	1.6	1.5	1.5
Wilts & Swindon	1.4	1.2	1.2	1.2	1.2
Swindon	2.0	1.9	2.0	2.1	2.1
Wiltshire	0.9	0.8	0.9	0.8	0.8
Kennet	0.9	1.1	1.1	1.0	0.9
North Wiltshire	1.0	0.8	0.8	0.8	0.8
Salisbury	0.6	0.6	0.6	0.6	0.6
West Wiltshire	1.0	1.0	1.1	1.0	1.0

Source: Claimant Count, NOMIS 2005.

The figures in Table 5 are based on the International Labour Organisation (ILO) definition of unemployment which includes as unemployed all those who are out of work, want a job, have actively sought work in the last four weeks prior to interview and are available to start work within the next fortnight, or are out of work and have accepted a job they are waiting to start in the next fortnight. The rates are calculated by dividing the number of unemployed people by those who are economically active. The unemployment rate (ILO) is a useful measurement of an area's underutilised labour supply. In the period March 2004 to February 2005 Wiltshire & Swindon's unemployment rate of 3.5% was lower than the national figure of 4.8%. The rate was slightly lower than the figure (3.7%) recorded for the previous 12 month period (March 2003 to February 2004). The contrast between the claimant count rate and the unemployment rate suggests that there is a difference in unemployment numbers representing a few thousand working age people who could

possibly be regarded as part of the 'hidden unemployed'. The 'hidden unemployed' do not claim or may not be entitled to Job Seekers Allowance and are therefore excluded from official unemployment statistics that are based on the claimant count. These people, in theory, are an untapped source of labour in the area.

Table 5: Unemployment Rates

Area	Mar 2003- Feb 2004	Jun 2003- May 2004	Sep 2003- Aug 2004	Dec 2003- Nov 2004	Mar 2004- Feb 2005
Great Britain	5.0	5.0	4.9	4.8	4.8
South West	3.3	3.2	3.2	3.3	3.4
Wilts & Swindon	3.7	3.9	3.8	3.8	3.5

Source: Quarterly Labour Force Survey, NOMIS 2005

Data for the four Wiltshire districts have been excluded since the estimates are unreliable.

AVERAGE EARNINGS

This section contains a brief examination of average earnings in Wiltshire & Swindon.

The Annual Survey of Hours and Earnings (ASHE) is a new ONS survey that has been developed to replace the New Earnings Survey (NES). ASHE includes improvements to the coverage of employees and the weighting of earnings estimates. The change in methodology means ASHE results are discontinuous with previous NES surveys. Table 6, which displays gross average full time earnings by workplace shows that Swindon had the highest average weekly (£546) and annual (£29,197) earnings, well above the regional and national averages. On the other hand, Wiltshire's earnings (£458 pw and £24,593 pa) were lower than the regional and national averages. North Wiltshire was the Wiltshire district with the highest earnings (£514 pw and £26,275 pa).

There is a significant discrepancy between Wiltshire's workplace and residence based earnings and this applies to all four Wiltshire districts. The opposite can be said for Swindon where residence based earnings are lower than workplace based earnings. The level of in/out commuting continues to have an impact on earnings in Wiltshire & Swindon.

Table 6: Gross Average Earnings (Full Time) 2004

Area	Workplace		Residence	
	Weekly Earnings (£)	Earnings PA (£)	Weekly Earnings (£)	Earnings PA (£)
Great Britain	507	27,099	-	-
England	515	27,682	-	-
South West	462	24,434	-	-
Swindon	546	29,197	534	28,183
Wiltshire	458	24,593	529	29,242
Kennet	416	25,442	559	31,042
North Wiltshire	514	26,275	587	31,956
Salisbury	431	23,425	480	27,777
West Wiltshire	450	23,879	500	26,985

Source: Annual Survey of Hours and Earnings, ONS 2005

PROPERTY

This section examines residential and commercial property prices. It also contains an overview of office, industrial and employment land availability in Wiltshire. Commercial property data for Swindon is not available for this edition of the Wiltshire and Swindon Quarterly Economic Review.

Commercial Property

Over the last year (June 2004 – June 2005), office availability within Wiltshire has remained very stable, with only a 0.32% decrease across the 12 month period (from 792,100 sq ft to 789,560 sq ft). Both Kennet and North Wiltshire experienced declines (13.18% and 0.7% respectively), however this was largely offset by increases in office availability within both West Wiltshire (5.58%) and Salisbury (2.29%) (Table 7).

Table 7: Office Availability in Wiltshire, June 2004 – June 2005

Area	June 2004 Sq Ft	June 2005 Sq Ft
North Wiltshire	406,138	404,629
Kennet	96,893	84,120
West Wiltshire	155,667	164,352
Salisbury	133,402	136,459
Wiltshire	792,100	789,560

Source: Inward Pilot, Wiltshire County Council, 2005

During the period June 2004 to June 2005, Wiltshire witnessed a decline in the availability of industrial premises (including warehousing), with the total area of industrial premises in the county falling by 26.33% from 2,810,117.6 sq ft to 2,070,335.5 sq ft (Table 8).

Industrial premises availability decreased across all districts, but most significantly within Kennet (seeing a fall of 54.33%) and West Wiltshire (experiencing a fall of 26%). The decline in industrial premises availability in Kennet can largely be explained by the fact that several large units and developments were taken up, sold or withdrawn between June 2004 and June 2005 whilst few large developments came on to the market. The only substantial development to come onto the market was Glenmore Business Park, Hopton Road, which comprised 14 units over 19,647 sq ft.

The decline in industrial premises availability within the district of West Wiltshire can also be attributed to the take-up of existing units and a lack of new premises entering the market.

Table 8: Industrial Availability in Wiltshire, June 2004 – June 2005

Area	June 2004 Sq Ft	June 2005 Sq Ft
North Wiltshire	928,991.15	847,951
Kennet	838,474	382,969
West Wiltshire	374,508.53	277,138.53
Salisbury	668,144	562,277
Wiltshire	2,810,117.6	2,070,335.5

Source: Inward Pilot, Wiltshire County Council, 2005

The total acreage of employment land available in Wiltshire at June 2004 was 352.37, by June 2005 this had fallen by 14.15% to 302.50. This trend can be largely explained by a significant decrease in the availability of employment land within North Wiltshire, which fell from 55.87 acres in June 2004 to 23.25 acres in June 2005 (a 58.39% drop). This was due

to exit of several key sites from the market, (namely Saltersford Lane, Chippenham -11 acres, Lydiard Fields, Wootton Bassett – 15.94 acres, Beversbrook, Calne -5.33 acres and Porte Marsh Road, Calne – 0.35 acres) combined with a lack of new land coming onto the market (Table 9).

Table 9: Employment Land Availability in Wiltshire, June 2004 – June 2005

Area	June 2004	June 2005
	Acres	Acres
North Wiltshire	55.87	23.25
Kennet	3.50	2.50
West Wiltshire	57.0	56.25
Salisbury	236.0	220.50
Wiltshire	352.37	302.50

Source: Inward Pilot, Wiltshire County Council, 2005

Average Commercial Rents

Average commercial rents for office premises appear to have remained quite stable over the last year in Wiltshire, with the exception of in Devizes where rents seem to have risen from £4.00 per sq ft per annum to £8.52 per sq ft per annum. However, this anomaly is due to the fact that in June 2004 there were 15 Devizes office properties on the Inward Pilot database, whereas in June 2005 there were only 8, 1 of which was a 62,722 sq ft office with an annual rental price of £95,000. This has therefore increased the average office rent quite dramatically. Also, the Inward Pilot database only contained rental price information for 4 of the 8 properties in 2005, which again makes it difficult to calculate an accurate average rent figure (Table10).

Average commercial rents for industrial premises between June 2004 and June 2005 were relatively stable. However, this is with the exception of Chippenham where average rents appear to have risen from £5.58 to £10.31. This increase can however also be explained by a lack of rental information from property agents on the Inward Pilot database. In June 2004, out of the 21 available Chippenham industrial properties that were on the database, 12 did not have rental price information. In June 2005, there were 30 such properties on the database, of which 14 did not have rental price information. This again has implications for the accurate calculation of average commercial rents (Table10).

Table 10: Average Commercial Rents in Wilts, Spring 2004 – Spring 2005 (£ per sq. ft per pa)

Area	March / April / May 2004		March / April / May 2005	
	Office	Industrial	Office	Industrial
Chippenham	£10.39	£5.58	£10.27	£10.31
Devizes	£4.00	£3.73	£8.52	£3.05
Salisbury	£9.35	£5.15	£9.80	£3.51
Trowbridge	£11.45	£3.51	£8.91	£3.51

Source: Inward Pilot, Wiltshire County Council, 2005

Residential Property

The Land Registry deals with the sale of all properties in England & Wales. It holds the most comprehensive information published on residential property transactions and prices. Land Registry data for the quarter January - March 2004 puts the average price (for all property types) for England & Wales at £184,131. In Swindon, the average house price in the first quarter of this year was put at £155,340 which is considerably lower than the regional and national averages of £197,724 and £184,131 respectively. Wiltshire, on the other hand, recorded a higher average house price of £208,842. However, the Wiltshire average masks considerable variation in house prices; Salisbury is the Wiltshire district with by far the highest average house price (£243,139) whilst West Wiltshire is the lowest with £179,669 (Table 11).

The average house prices in England & Wales in Jan-March 2005 was just over 10 % higher than the same quarter a year earlier. Across the South West region, house prices also rose by about 10% during the same period. In contrast, average prices rises in both Swindon (5.8%) and Wiltshire (8.2%) failed to match the regional and national figures. However, there are exceptions; a look at district level data shows that the average house price rise in Kennet was 10.8% and in Salisbury it was 21.6%.

More recent comparisons of house price changes reveal that from July/September 2004 onwards the housing market began to slowdown and average house prices fell. The average England & Wales house price fell by 2% during the period July/September 2004 to January/March 2005. Swindon experienced a percentage decrease in average house price of 1.6% which is similar to the national average however Wiltshire fared less well with a decrease of 4.9%. North Wiltshire was the district with the greatest percentage decrease in price with 7.3% whilst Salisbury had the lowest decrease with 1.5%. This housing market slowdown still continues but the general feeling is that it is undergoing a correction rather than heading for a crash.

Table 11: Average House Price

Area	Jan-Mar 2004 (£)	April-Jun 2004 (£)	July-Sept 2004 (£)	Oct-Dec 2005 (£)	Jan-Mar 2005 (£)
England & Wales	166,245	175,802	187,846	183,306	184,131
South West	178,933	187,420	200,886	198,693	197,724
Swindon	146,884	154,383	157,363	156,368	155,340
Wiltshire	192,974	199,047	219,659	213,423	208,842
North Wiltshire	199,938	202,069	219,576	212,988	203,610
Kennet	210,118	221,752	242,896	236,695	231,326
West Wiltshire	174,753	175,433	188,416	179,299	179,669
Salisbury	200,027	220,009	246,956	253,682	243,139

Source: Residential Property Price Data, Land Registry 2005

AGRICULTURE AND HORTICULTURE

This section contains an overview of agricultural and horticultural activity in Wiltshire and Swindon using recently published data from the June Agricultural Census 2004 (Department Environment Food and Rural Affairs (DEFRA)).

Land Use

The total agricultural and horticultural land area in Wiltshire and Swindon in June 2004 was 265,600 hectares (Table 12) which represents a decline of 2% from June 2003. The decline in the total number of hectares dedicated to agricultural and horticultural activity in Wiltshire & Swindon has been declining steadily since 2001 at an average of 1-2% each year. In the year leading up to June 2004 the number of holdings also declined, by approximately 1%. Kennet and Salisbury are the districts which continue to use the largest amount of agricultural and horticultural land.

Table 12: Land in Agricultural and Horticultural Use, 2004

Area	Total Hectares	Number of Holdings
Wiltshire & Swindon	265,600	3,489
Swindon	13,649	202
Wiltshire	251,951	3,287
Kennet	77,913	669
North Wiltshire	61,954	1,214
Salisbury	75,366	834
West Wiltshire	36,717	570

Source: June Agricultural Census 2004, DEFRA 2005

Farm Size

Of the 3,489 holdings in Wiltshire & Swindon, 41.3% are less than five hectares in size and 18.3% hold over 100 hectares or greater (Table 13). West Wiltshire is the district with the highest proportion of small holdings (49.6%) and Kennet has the highest proportion of large holdings (26.3%). This 2004 data showing the breakdown of holdings by size shows that there have been no significant changes from 2003.

Table 13: Holdings by Size, 2004

Area	<5 ha.	5-199 ha.	20-49.9 ha.	50-99.9 ha.	100+ ha.
Wiltshire & Swindon	41.3	17.6	11.6	11.2	18.3
Swindon	39.9	14.8	16.5	11.9	16.9
Wiltshire	41.4	17.8	11.3	11.1	18.4
Kennet	37.8	16.2	10.3	9.4	26.3
North Wiltshire	38.9	19.7	13.5	14.1	13.8
Salisbury	41.8	18.7	9.2	9.7	20.6
West Wiltshire	49.6	14.6	11.1	9.2	15.5

Source: June Agricultural Census 2004, DEFRA 2005

Land Tenure

The majority of land in Wiltshire & Swindon is owner occupied (Table 14). Wiltshire has a significantly higher proportion of land being farmed by owners than Swindon. North Wiltshire is the district with the highest share of owner occupied farmed land. The proportion of land that is rented or owned remains relatively unchanged since 2003.

Table 14: Holdings by Ownership Type, 2004

Area	% Rented	% Owned
Wiltshire & Swindon	39	61
Swindon	51	49
Wiltshire	39	61
Kennet	44	56
North Wiltshire	25	75
Salisbury	44	56
West Wiltshire	36	64

Source: June Agricultural Census 2004, DEFRA 2005

Farm Employment

In June 2004 the total number of agricultural and horticultural workers in Wiltshire and Swindon stood at 7,199 (Table 15). This figure represents a 17% decrease in farm employment since 1990. This decline in employment may be attributable to various factors which have led, directly or indirectly, to significant labour cutbacks. For a more detailed explanation of farming employment decline please refer to recent editions of the Wiltshire & Swindon Economic Assessment.

Table 15: Farm Employment, 2004

Area	Employment
Wiltshire & Swindon	7,199
Swindon	372
Wiltshire	6,827
Kennet	1,589
North Wiltshire	2,264
Salisbury	1,776
West Wiltshire	1,197

Source: June Agricultural Census 2004, DEFRA 2005

EDUCATION ATTAINMENT (PRE-16)

This section concentrates on education attainment for the pre-16 age group.

Key Stage 2 Literacy & Numeracy

The figures outlined in Table 16 show the percentage of 11 year olds in Wiltshire and Swindon achieving Level 4 in Key Stage 2 Numeracy & Literacy in 2004 compared to the national achievements; the results show that 77% of 11 year olds reached the required standard in English and 76% in mathematics in Swindon LEA whilst in Wiltshire LEA, 76% reached the required standard in English and 71% in mathematics. The 2004 KS2 numeracy and literacy attainments for Swindon LEA were either on a par with or exceeded the regional and national averages. By comparison, Wiltshire LEA attainment levels were below par.

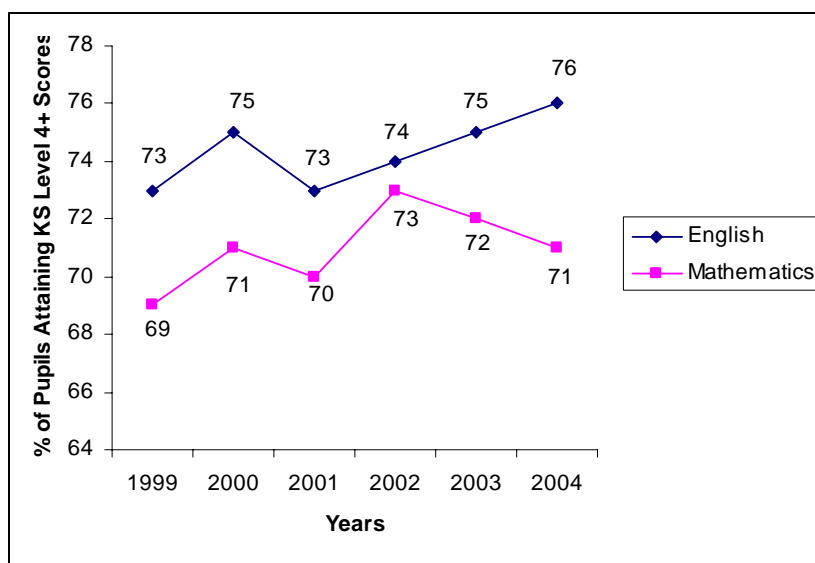
Table 16: % of 11 year Olds Achieving Level 4 (KS2) Numeracy & Literacy, 2004*

Area	Literacy	Numeracy
Wiltshire	76	71
Swindon	77	76
South West	78	74
England	77	74

Source: DfES, 2005

The historical data provided in Figure 1 show that apart from a slight dip in 2001, Wiltshire has achieved year on year improvements in literacy from 1998 to 2003. However, pupils have not fared so well in numeracy with the LEA registering declining results for two consecutive years (2002 onwards). The percentage numbers of 11 year old pupils who have reached the required numeracy standard is therefore not showing any signs of improvement.

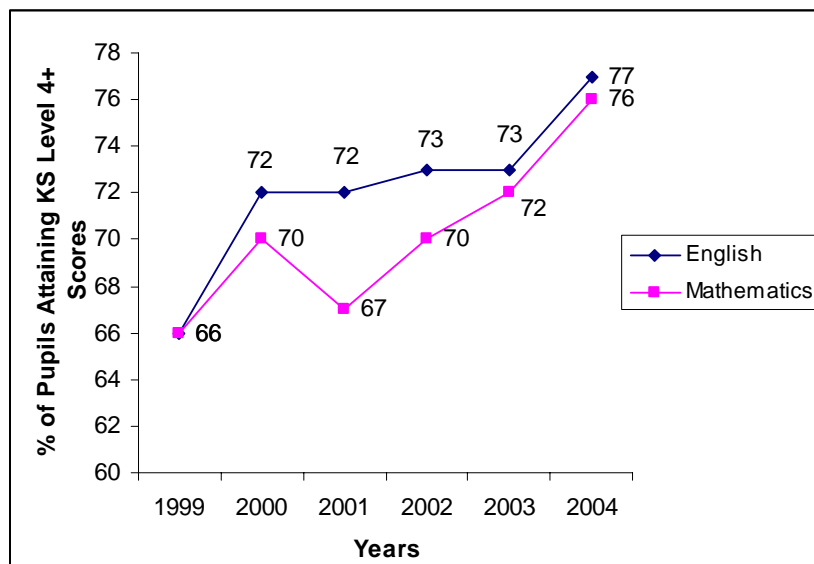
Figure 1: % of Pupils in Wiltshire LEA Attaining KS2 Level 4+ Scores 1999-2004



Source: DfES, 2005

Figure 2 shows that literacy results in Swindon have been improving steadily from 1999 onwards, with the 2004 figures taking this LEA's achievements in literacy to higher levels than the South West and England average. Numeracy results for the same period (1999 – 2004) shows a similar pattern with 76% of 11 year olds reaching the required standard in 2004. The 2004 results represent an impressive achievement in the improvement of literacy and numeracy skills in Swindon LEA

Figure 2: % of Pupils in Swindon LEA Attaining KS2 Level 4+ Scores 1999-2004



Source: DfES, 2005

GCSE Attainment

2004 GCSE data (Table 17) show that Wiltshire LEA is performing above the South West and England averages for pupils achieving at least 5 A*-C grades at GCSE as well as pupils achieving at least 1 GCSE at grades A*-G. Swindon's attainment levels are below average in both categories.

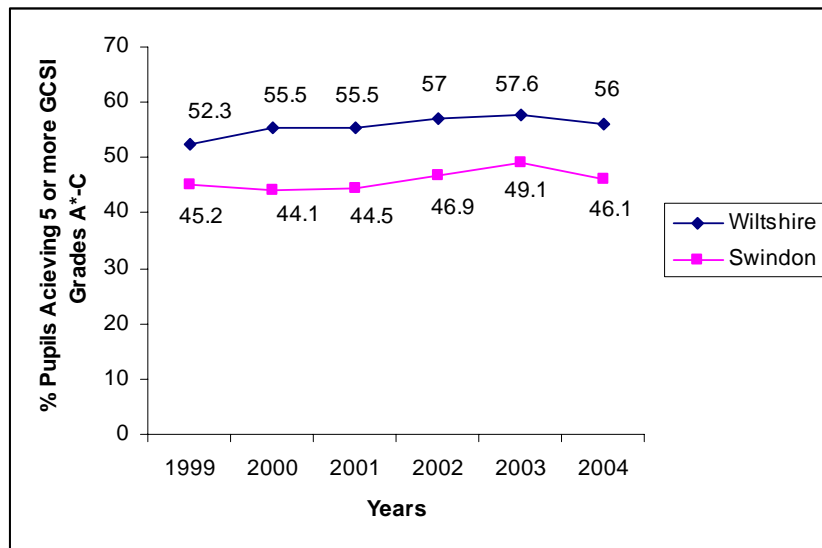
Table 17: % of Wiltshire & Swindon Pupils Achieving GCSE or Equivalent Grades A*-C/G, 2004

Area	% of Pupils Achieving 5+ GCSE or Equivalent at Grades A*- C	% of Pupils Achieving at least 1+ GCSE or Equivalent at Grades A*- G
Wiltshire	56	96.2
Swindon	46.1	94.8
South West	54.3	95.6
England	51.5	95

Source: DfES, 2005

Figure 3 reveals that although in recent years there has been a very gradual upward trend in the number of pupils achieving higher grades at GCSE in both Wiltshire and Swindon, the 2004 results were below par when compared o the previous year. However, the 2004 GCSE results are provisional so there is still a possibility that the revised data, which will be released in due course, will contain some favourable adjustments.

Figure 3: % of Wiltshire & Swindon Pupils achieving 5 or more GCSE Grades A*-C, 1999 – 2004.



Source: DfES, 2005

JOB LOSSES AND GAINS

Table 18: Job Losses

Company	Activity	No. of Jobs Lost	Date Reported	Comment
Woven Electronics	Electronics Store	51	02/02/05	American owned Woven Electronics called in the receivers following a drop in profits. A total of 51 members of staff were made redundant.
Airsprung	Bed Manufacturers	11	04/03/05	11 workers at Airsprung were redundant. This move has been blamed on the need to cut rising costs.
Countrywide Farmers	Animal Feed Mill	49	20/05/05	Countrywide Farmers announced that they have decided to close its animal feed mill. 49 jobs have been axed.

Source: Extracted from the local press. This is not an exhaustive list of all job losses in Wiltshire & Swindon reported between Jan and June 2005

Table 19: Job Gains

Company	Activity	No. of Jobs Gained	Date Reported	Comment
Maplin Electronics	Electronics	17	04/02/05	Electronic retailer, Maplin Electronics, has set up in Swindon at Greenbridge Retail Park. 17 new jobs have been created
National Trust	Museum Activities and Preservation of Historic buildings.	Not Known	01/07/05	National Trust employees currently based in Wiltshire and Gloucestershire will be moved to the new Heelis Building in Swindon
Buildstore	Building Warehouse	Possible 100	01/03/05	Buildstore, a self-build and home improvement centre will be opening in spring next year. The centre will be located near junction 16 of the M4. It is claimed that it will be the largest permanent showcase for renovation and building in the country. Over 100 jobs may be created.
Fascia Graphics	Graphic Design	10	03/06/05	Chippenham based firm Fascia Graphics is expanding and relocating to Bath Road Industrial Estate. This move is expected to create 10 jobs in the town.
Bonallack & Bishop	Lawyers	2	28/01/05	A Salisbury firm of solicitors recruited two new members of staff.
BLB Solicitors	Lawyers	3	11/03/05	BLB Solicitors appointed 3 new members of staff.
Airsprung	Bed Manufacturers	5	15/04/05	Airsprung recruited five new members of staff to join the existing sales team.

Source: Extracted from the local press. This is not an exhaustive list of all job gains in Wiltshire & Swindon reported between Jan and June 2005

SUMMARY – KEY ECONOMIC INDICATORS

	Population Growth % 2001 -2004	GVA Per Head 2002 (£)	GVA Growth (%) per annum 1995-2002	Economic Activity Rate Mar 2004 – Feb 2005	Employment Rate Mar 2004 – Feb 2005	Claimant Count Rate April 2005	Change in Employment (%) 1998-2003	Change in Number of Firms (%) 1998 - 2003	Average Price (£) of Residential Property Jan – Mar 2005
Great Britain *	1.23	15,633	58.6	78.7	75.0	2.4	5.9	7.4	184,131
South West	1.09	14,286	5.9	81.4	78.6	1.5	10.9	10.2	197,724
Wiltshire & Swindon	2.5	-	-	84.5	81.6	1.2	4.6	13.9	
Wiltshire	2.7	13,861	4.8	83.8	80.8	0.8	11.5	14.7	208,842
Swindon	1.9	24,113	6.7	86.2	83.5	2.1	-5.1	11.9	155,340
Kennet	2.2	-	-	84.5	80.3	0.9	16.3	17.8	231,326
North Wiltshire	2.1	-	-	82.0	77.2	0.8	8.0	13.9	203,610
Salisbury	1.7	-	-	88.0	86.5	0.6	22.8	14.2	243,139
West Wiltshire	4.6	-	-	81.5	79.7	1.0	2.7	13.8	179,669

Source: NOMIS, ONS, Land Registry

*England (not Great Britain) is the national geographical area for residential property and GVA statistics.

OTHER NEWS

This section provides an opportunity for WSEP Partners to report on economic development news and events.

SWRDA has announced that as part of the Government's Rural Strategy 2004, Regional Development Agencies will take a wider socio-economic regeneration role in rural areas. SWRDA has captured its proposals for this activity under the title "Developing the Rural Economy". The "Tasking Framework", agreed nationally with Government Departments, requires RDAs to assist the Department for the Environment, Food and Rural Affairs (DEFRA) in achieving their PSA4 target for Sustainable Rural Communities from 2005/2006 onwards.

SOUTH WEST TOURISM has recently published its 'Value of Tourism' report. This report paints a broad picture of the economic value of tourism in the region in 2003. It draws together evidence from a number of sources including the United Kingdom Tourism Survey, International Passenger Survey, United Kingdom Day Visitor Survey and the Cambridge mathematical model. The Value of Tourism report has been funded by the majority of county and district tourism departments across the South West. The complete report can be accessed from the South West Tourism website http://www.swtourism.co.uk/html/research_statistics.asp.

The **WEST WILTS SHOW** returns to Trowbridge Park on the 28th July for 3 days. The show is the biggest community event in the district and provides a showcase for both commercial and not-for-profit exhibitors. Features will include:

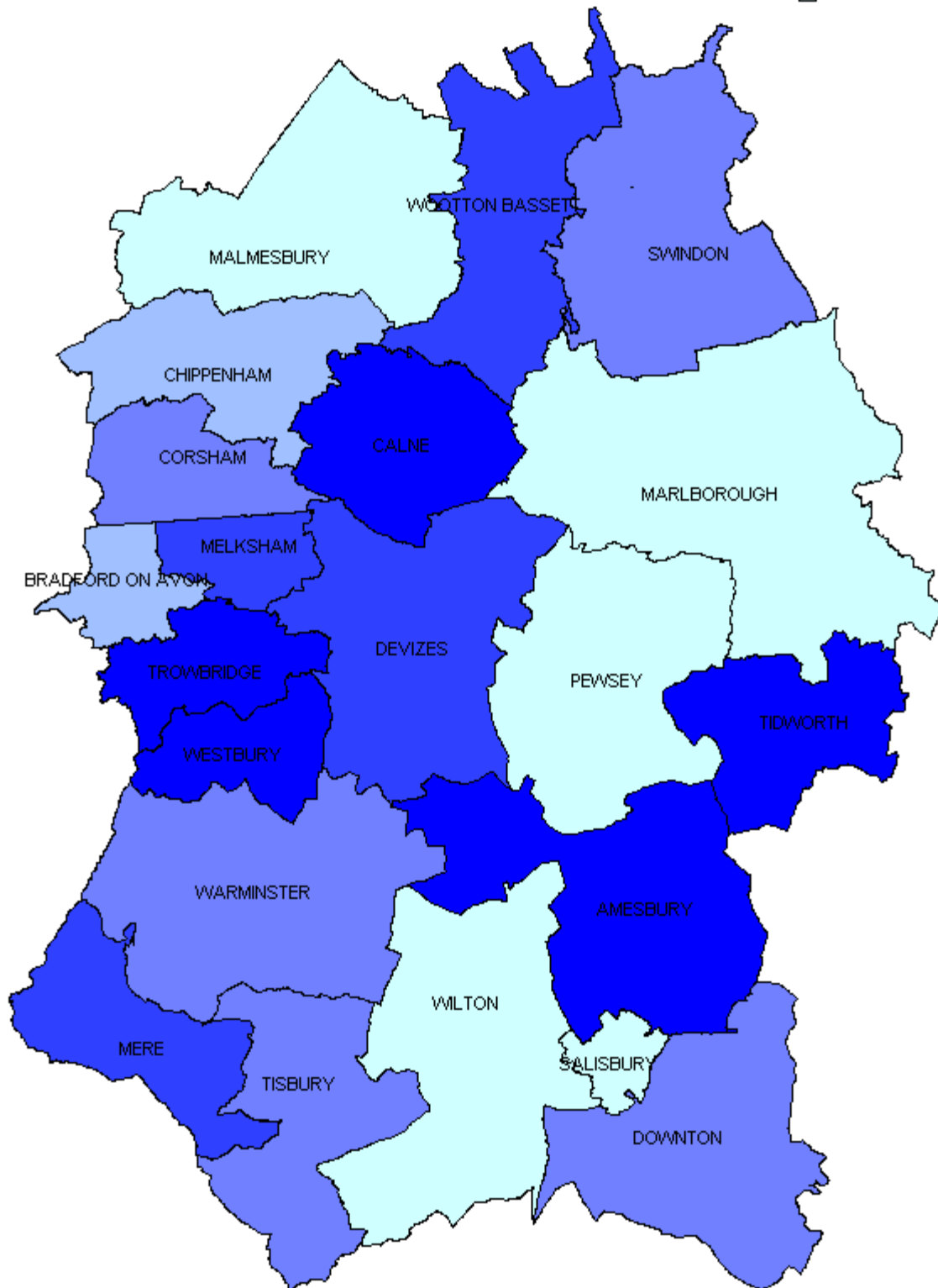
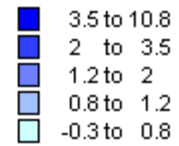
- Motor Fair
- Outdoor living
- Arts & crafts
- Flower show
- ITV1 West Garden Roadshow
- Community spotlight
- Business section
- Spotlight on Europe
- Village Green area
- Live music and family entertainment

Spaces can be reserved by filling in the booking form at <http://www.westwiltshow.net/>, calling 01225 770387 or e-mailing communications@westwiltshire.gov

APPENDIX 1

POPULATION GROWTH ESTIMATES 2001 - 2004 SWINDON BOROUGH & WILTSHIRE COMMUNITY AREAS

Population Change (%)



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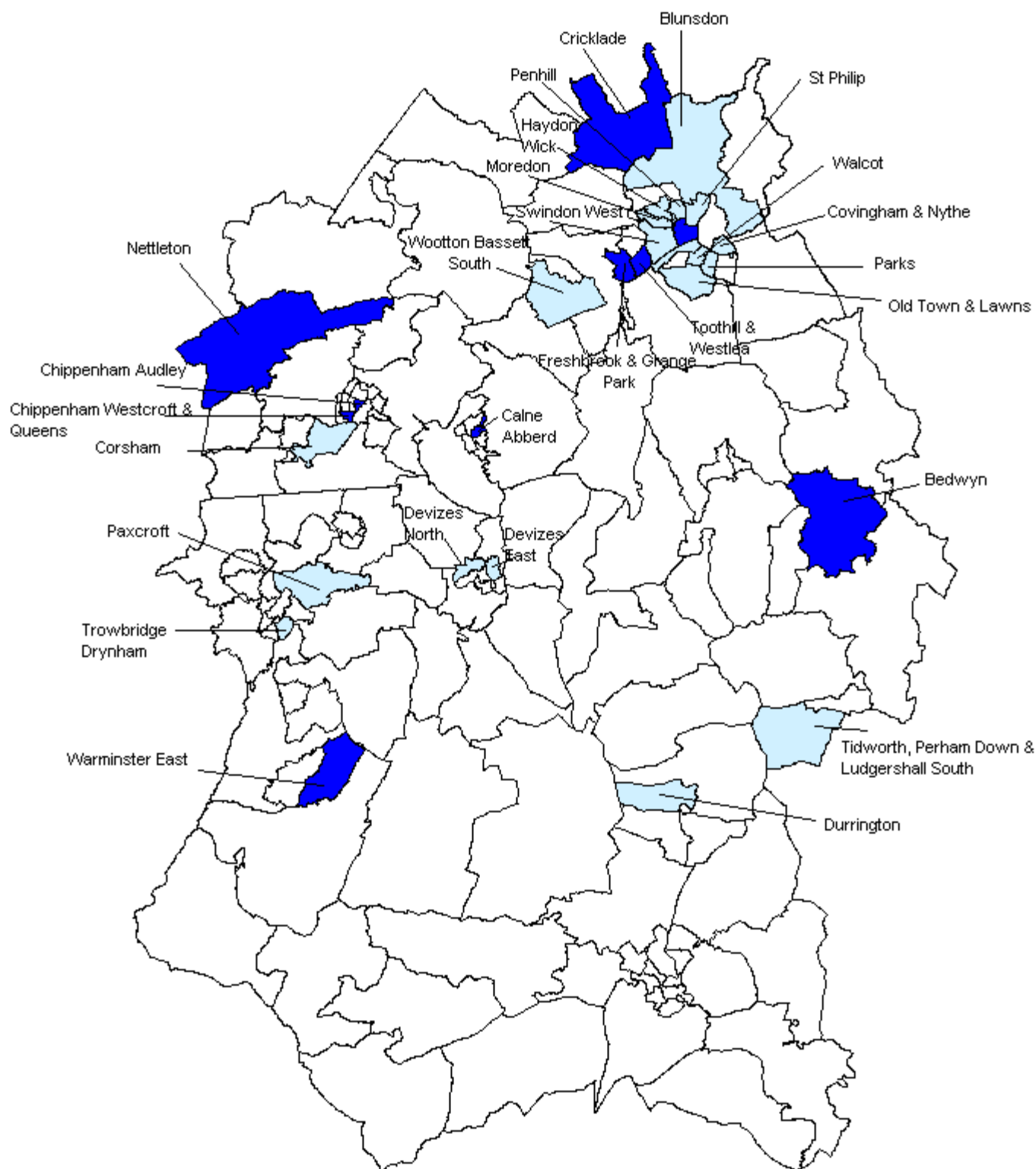
Wiltshire County Council. 100023455. 2005

APPENDIX 2

ANNUAL UNEMPLOYMENT CHANGE APRIL 2004 - APRIL 2005

Claimant Count Change
Between April 2004 and April 2005

- Increase of 10+ people
- Decrease of 10+ people
- all others



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