

Swindon and Wiltshire Local Economic Assessment

June 2025



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1. Executive Summary

Section Executive Summary: Economy

- **Combined, Swindon and Wiltshire contribute a significant £26bn in GVA to the UK economy**, with Swindon accounting for 44% (£11.5bn) and Wiltshire accounting for 56% (£14.4bn) of total output.
- **Growth has differed between the two areas**, with Wiltshire experiencing a strong recovery following the COVID-19 pandemic (a GVA growth rate of +9% between 2019-2022) and Swindon experiencing a small economic contraction during this period of 1%. The biggest decline in GVA was observed in the Swindon's manufacturing sector, which can be partially attributed to the closure of Swindon's Honda site in 2021 and the subsequent job losses.
- The top six sectors by GVA output in Swindon and Wiltshire are **real estate** (£3.2bn, 12% of total GVA); **financial and insurance** (£3.1bn, 12%); **manufacturing** (£2.8bn, 11%); **professional, scientific and technical** (£2.5bn, 10%); **wholesale and retail** (£2.4bn, 9%) and **public admin and defence** (£2.2bn, 9% of total GVA). Swindon has a particularly high reliance on economic output from financial and insurance services (26%), far exceeding both Wiltshire and the national average. Meanwhile, Wiltshire experiences a concentration of GVA output in public administration and defence (14%).
- Some **underrepresented sectors** persist in economy with lower GVA contributions such as **education, information and communication** and **accommodation and food**. Despite lower representation in terms of economic output they remain important sectors as foundational aspects to other economic activity and support place identity in Swindon and Wiltshire.
- **Labour productivity in Swindon and Wiltshire has increased in recent years**, rising from £58,650 per job filled in 2019 to £64,950 in 2022 (+11%). This growth outpaced England's average productivity level of £62,750 and the productivity growth rate (+8%).
- **Wiltshire's productivity has grown rapidly (+12%) but remains below the national average**, with an output per job filled of £53,893. Swindon's productivity of £88,244 per job filled continues to lead the micro-organisations, ranking 1st out of the 27 local authorities in the region and 12th out of the 296 local authorities in England.
- **There are currently 28,555 enterprises operating in Swindon and Wiltshire**, representing 13% of the South West's business base—proportionate to their share of the region's population (also 13%). There are approximately 7,035 businesses in Swindon (25%) and 21,520 in Wiltshire (75%). Most businesses in the area are micro-organisations employing fewer than 9 people (90%), in line with regional and national averages, with only 25 large businesses employing over 1,000 people each.
- **Between 2019 and 2024, the number of enterprises in Swindon and Wiltshire declined by 5%**, representing a loss of 1,370 businesses. This decline was observed in both Swindon (-6%) and Wiltshire (-4%), in contrast to slight growth at the national (+0.3%) and regional (+0.7%) levels.
- **Trade with non-EU countries is more significant for Swindon and Wiltshire** than trade with the EU, accounting for 66% of exports compared to 34% in 2022.
- **The total number of people employed in Swindon and Wiltshire decreased by 2,000 between 2018 and 2023**, a decline of 1%. This contrasts with the national trend, which experienced a 5% increase. Approximately 4,000 jobs were lost in the manufacturing sector in Swindon, largely due to the closure of the Honda site in 2021.
- Swindon exhibits strong employment specialisms in **transport and storage (LQ 2.1)**, **financial and insurance (LQ 2.6)**, and **motor trades (LQ 1.8)**.
- Wiltshire demonstrates employment specialisms in **manufacturing (LQ 1.2)**, **construction (LQ 1.3)**, and **agriculture (LQ 2.8)**.
- **Swindon has a negative net inflow of commuters¹ (-3,705)**, meaning more people leave the area for work than people commute into it. Oxfordshire and Berkshire attract a significant proportion of Swindon's residents (22% and 14% of total outflow, respectively).
- **Wiltshire has a negative net inflow of commuters (-737)**, meaning more people leave the area for work than people commute into the area. West of England attracts a significant proportion of Wiltshire's residents to work (24% of total outflow).

Note: 1 The analysis of commuting patterns uses data from the Census 2021. This census was undertaken during the Coronavirus pandemic when large parts of the UK economy were under lockdown and people were encouraged to work from home.

Section Executive Summary: People

- **Around 756,000 people live in Swindon and Wiltshire, of which 32% live in Swindon compared to 68% in Wiltshire.** Over the past 5 years, Swindon and Wiltshire's population has grown by 4% (+27,500 people), which is above the national average (3%). This growth suggests that Swindon and Wiltshire is a relatively attractive region for migration and residential expansion, supported by a breadth of economic opportunities and quality of life.
- **There is below average proportion of residents of working age and sluggish growth in this cohort.** The proportion of working age residents stands at 61% compared to 63% nationally. Over the past five years the number of working age adults has grown by only 2%, compared to 3% nationally.
- **The population of Swindon and Wiltshire is ageing.** The proportion of residents aged 65+ is 21% (compared to 19% nationally) and there has been a boom in this cohort, with an 11% increase (+15,460 people) in the past five years. This has implications for service provision including health and care to meet the needs of a changing demographic.
- **Swindon has a diverse ethnic composition with a high share of non-British and non-EU born residents** (6% compared to 4% nationally) whereas Wiltshire has a very low share (1%) compared to the national benchmark. Ethnic diversity and migration can be harnessed as a driver of economic growth, supporting entrepreneurialism, culture and vitality, and employment.
- **Four in five people living in the Swindon and Wiltshire area are considered “economically active”** and the proportion economically active has increased over time. A strong workforce participation rate suggests robust economic health and workforce engagement.
- **There is a significant pool of potential workers that could be mobilised to respond to skill shortages and gaps.** Although Swindon and Wiltshire has a relatively low and declining economic inactivity rate, 18% of economically inactive people want a job. A high proportion of inactive people have retired, cannot work due to long term sickness or caring responsibilities, so interventions to support them to progress into and remain in work will be beneficial, many of these individuals are within the working age (16-64) demographic and could offer significant contributions to the local labour market.
- **Swindon and Wiltshire has a low rate of unemployment at 2.3% relative to benchmark areas** and has seen a continued reduction in the number of people unemployed since 2022. This is a sign of a relatively strong job markets and economic vitality. Nevertheless, in absolute terms, there is a pool of 8,700 people currently classed as unemployed and 12,650 benefit claimants requiring support.
- **There is a tight labour market in Swindon and Wiltshire,** illustrated by the below average working age population, high economic activity rate and an employment rate of 81.7% which is significantly above the national average (75.7%). Residents in employment are well utilised, with 78% in full time employment.
- **Swindon and Wiltshire have a high proportion of resident workers in high-level occupations** (this includes high-skilled roles and is often correlated with – though not always guaranteed to offer – higher wages), and this cohort is growing rapidly compared to other comparator areas. This points to a skilled and growing professional workforce.
- **The Employer Skills Survey found that 10% of employers identified skills shortages as the reason behind vacancies in Swindon and Wiltshire,** which is on par with the national average, but lower than comparator areas. Skills shortages remain a challenge, but less so compared to other regions, indicating potential opportunities for targeted workforce development.
- **Swindon and Wiltshire have a larger proportion of schools rated ‘good’, and a smaller proportion of schools rated ‘inadequate’.** This reflects positively on the local education system and could be a key attractor for families moving to the area. However, some focus needs to be given on some schools who are not performing as well as their peers.

Section Executive Summary: Place

- Total stock of industrial floorspace in Swindon and Wiltshire stands at 6.2m sq. ft and **has grown by 137% (+3.3m sq. ft) over the past ten years, with Swindon comprising 35% and Wiltshire 65% of the two local authorities industrial floorspace.** This growth has supported significant sectoral expansion, particularly in the transport and storage sector, which saw a 20% increase in businesses.
- **7% of industrial floorspace is vacant in Swindon and Wiltshire.** The average rental price has risen from £4.50 to £7.18 per sq. ft over the past ten years. A sharp increase in vacancy and rental rates occurred in 2021, persisting until 2023.
- **Total available Light industrial floorspace has decreased by 21% over the past ten years** in Swindon and Wiltshire. Total stock stands at 308k sq. ft.
- The average vacancy rate for light industrial floorspace is 5.3%, down from 6.2% in 2015. **Swindon has experienced a 6% increase in vacancy rates, while Wiltshire has experienced a 35% decrease.** Rental rates have increased by 57% in Swindon and 58% in Wiltshire, now averaging £8 per sq. ft.
- **There is over 1m sq. ft of office floorspace in Swindon and Wiltshire, with Wiltshire comprising 57% and Swindon 43%. 11.7% of office floorspace is vacant,** up from 3.5% in 2019. There has been a 38% increase in rental values since 2015.
- **There is over 800k sq. ft of retail floorspace in Swindon and Wiltshire,** with over two-thirds in Wiltshire. **3% of retail floorspace is vacant,** and the average rental price has decreased by 9% since 2015 to £20.48 per sq. ft.
- **House prices in Swindon and Wiltshire have risen faster than the national average,** with Swindon witnessing a 74% increase and Wiltshire a 63% increase from 2013-2023 compared to 67% nationally.
- **66% of residents in Swindon and Wiltshire own their homes, higher than the national average of 61%.** 43% of homes are under-occupied, with Wiltshire at 46% and Swindon at 36%. Homes are less likely to be overcrowded (2%) compared to the national average (4%).
- **Recycling rates in Swindon and Wiltshire stand at 41%,** slightly above the national average. Wiltshire has a higher rate (42%) compared to Swindon (37%). 63% of non-household waste is recycled in Swindon, while Wiltshire recycles 56%.
- **CO2 emissions in Swindon and Wiltshire have fallen by 31% since 2012,** with Swindon consistently below the national average with 4.1t CO2 per capita compared to 5.6t CO2 per capita nationally, Wiltshire's emissions are generally above the national average at 5.8t CO2 per capita.
- **Transport emissions are the largest contributor to CO2 emissions in Swindon (43%) and Wiltshire (38%),** with A Roads and minor roads accounting for four-fifths of these emissions. Domestic emissions were the second largest contributor, at 27% in Swindon and 21% in Wiltshire.

Executive Summary – Swindon

This brief summary provides an overview of the main findings of the 2025 Local Economic Assessment in relation to Swindon.

Swindon Borough Council is responsible for local service delivery in the area. Economically, Swindon is a key driver of economic output, employment and business activity. Crucially, Swindon needs to manage this growth and ensure the opportunities shaping its future are sustainable and inclusive of all residents.

Executive Summary: Swindon's Economy

Economic Output

Using a gross value added (GVA) metric we historic, estimate the size of Swindon's economy as an expression of the output created in the area less the cost of inputs. Latest data from 2022 estimates Swindon's GVA to be **£11.4bn**.

Using real money terms (2019 money value), **Swindon's economy remained 1% smaller in 2022 than in 2019**, this equates to economy that is £85m smaller in value. This may imply some lingering economic impact of the COVID-19 pandemic. This counters the national trend which saw a +2% rate of growth between 2019 and 2022 it also counters the economic circumstances in neighbouring Wiltshire where the growth rate was +5% during this period. However, this should be heavily caveated that this data is somewhat historic, and a recovery may have since occurred. We can examine where some of these economic losses occurred through an examination of sectors.

Two sectors in Swindon account for the majority of the economic contraction seen in 2019-2022 – Manufacturing (contracting by 26%, -£371m) and agriculture, mining, electricity, gas, water and waste (contracting by -25%, -£299m). While further research would be required it is likely the disruption caused by the closure of the Honda factory is an element of the manufacturing contraction seen during this period. The economy would have faced more significant challenges had it not been for healthy growth in financial and insurance (+19%, +£380m) and in the professional, scientific and technical sector (+18%, +£140m).

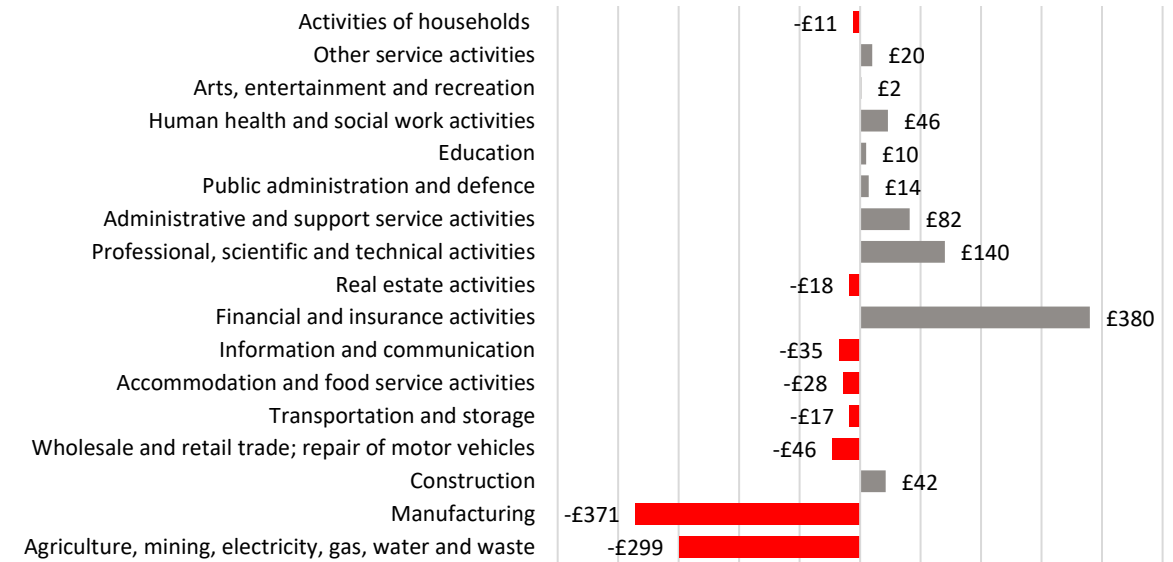
Considering a sectoral dimension to Swindon's economy further – one of the most important sectors in Swindon (by GVA) is now **financial and insurance activities** accounting for 26% of GVA (£3bn of the area's output in 2022). No other sector accounts for more than 10% of the area's GVA.

Productivity

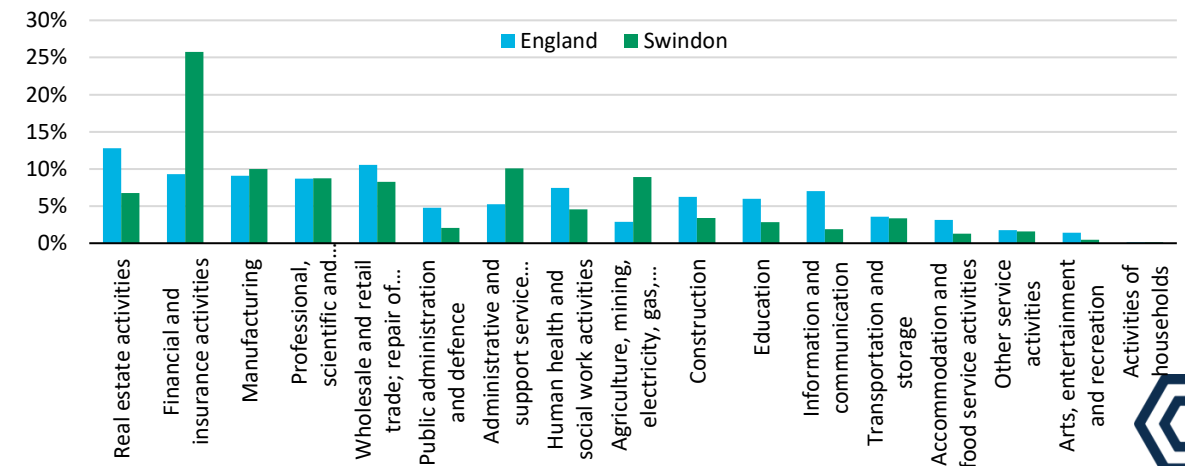
Despite economic challenges outlined above, Swindon remains a very productive area. Swindon currently ranks as the 12th most productive local authority in England and therefore has a positive productivity gap compared to the national average with output per job filled at £88,240 in Swindon compared to £62,751 for England. Productivity in Swindon has also grown at a healthy +12% (2019-2022).

Source: ONS Regional Accounts, 2019-2022; ONS Labour Productivity, 2019-2022

Economic Output Change (£m) in Swindon, by Sector, 2019 to 2022



Sectoral Proportion of Economic Output in Swindon and England, 2022



Executive Summary: Swindon's Economy

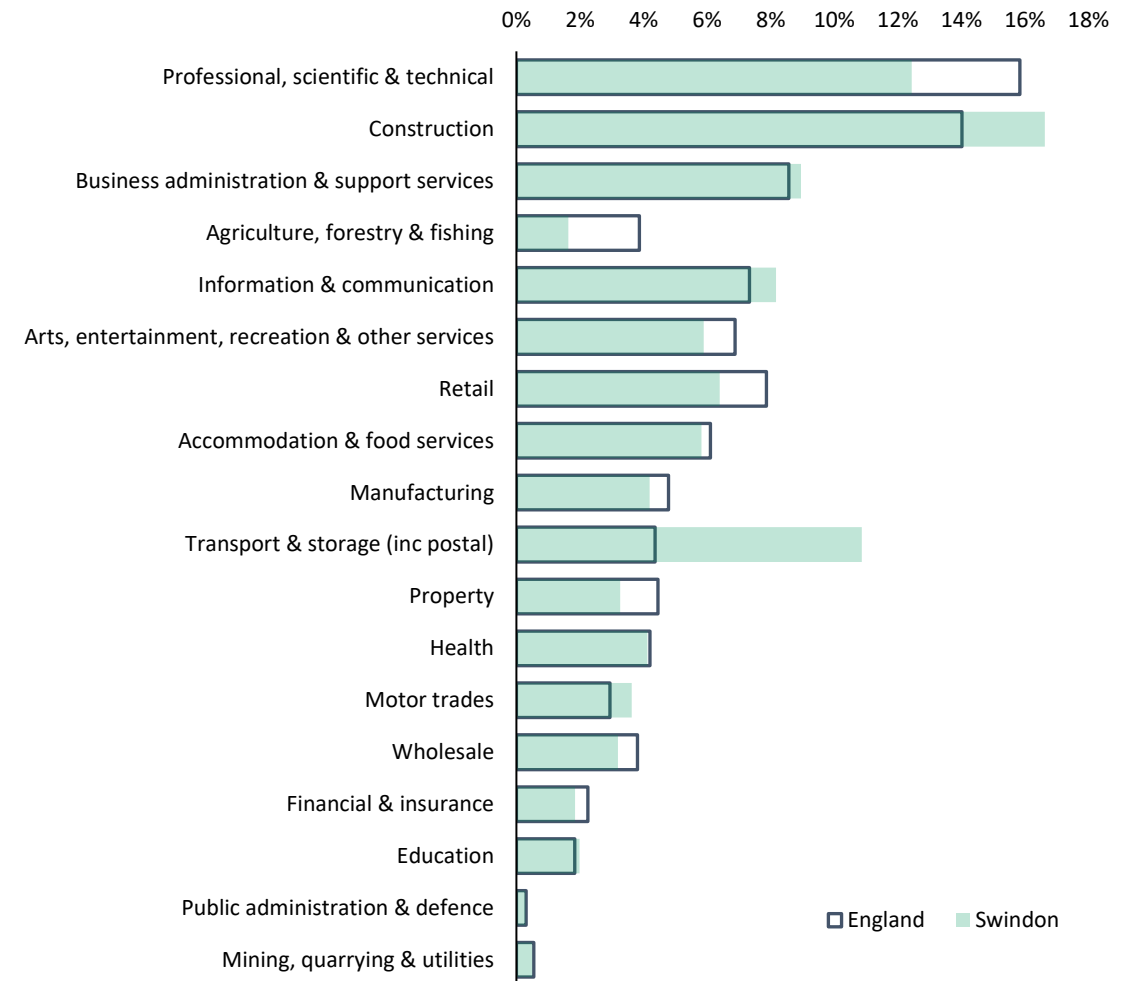
Business Base:

The majority – **98% of businesses** in Swindon are classed as being micro or small businesses employing less than 50 people. This is in line with the national position, where 98% of businesses are also either micro or small. However, nationally, there are proportionately slightly fewer micro firms (0-9 employees) 89% of all business in England compared 90% in Swindon.

Business survival rates are becoming a challenge in Swindon, with 1-year survival rates for organisations established in 2022 at 89% compared to 95% for Swindon businesses established in 2018. Nationally, survival rates for 2022 established firms are also higher with a 92% chance of a firm surviving for 1 year. Longer term survival rates are also relatively low, with only 37% of businesses established in Swindon in 2018 surviving into their fifth year compared to 39% nationally. However, it should be noted that lower survival rates do not automatically mean economic challenge. Given Swindon's high productivity, there is a possibility that a high churn of businesses is the result of a competitive environment that spurs on innovation and productivity – though further research would be required to confirm this hypothesis.

Data from 2024 estimates that Swindon has a **business base population of 7,035**. Despite the substantial economic contribution, the professional, scientific and technical sector brings to Swindon, the sector accounts for fewer proportionate businesses than it does at the national level (12% versus 16%). In other areas, notably transport and storage and construction, there is a higher proportion of businesses than seen nationally.

Proportion of Businesses by Broad Sector, Swindon and England, 2024



Source: ONS UK Business Counts, 2019-2024

Executive Summary: Swindon's Economy

Business Base:

Between 2019 and 2024, the business base population experienced a **6% contraction, equating to a loss of 485 businesses**. At the national level there was a very small rate of growth in the business population (+0.3%).

When considering sectors, a significant amount of the loss of businesses in Swindon occurred in the professional, scientific and technical and the information and communication sectors. These two sectors also saw losses nationally.

Priority sectors

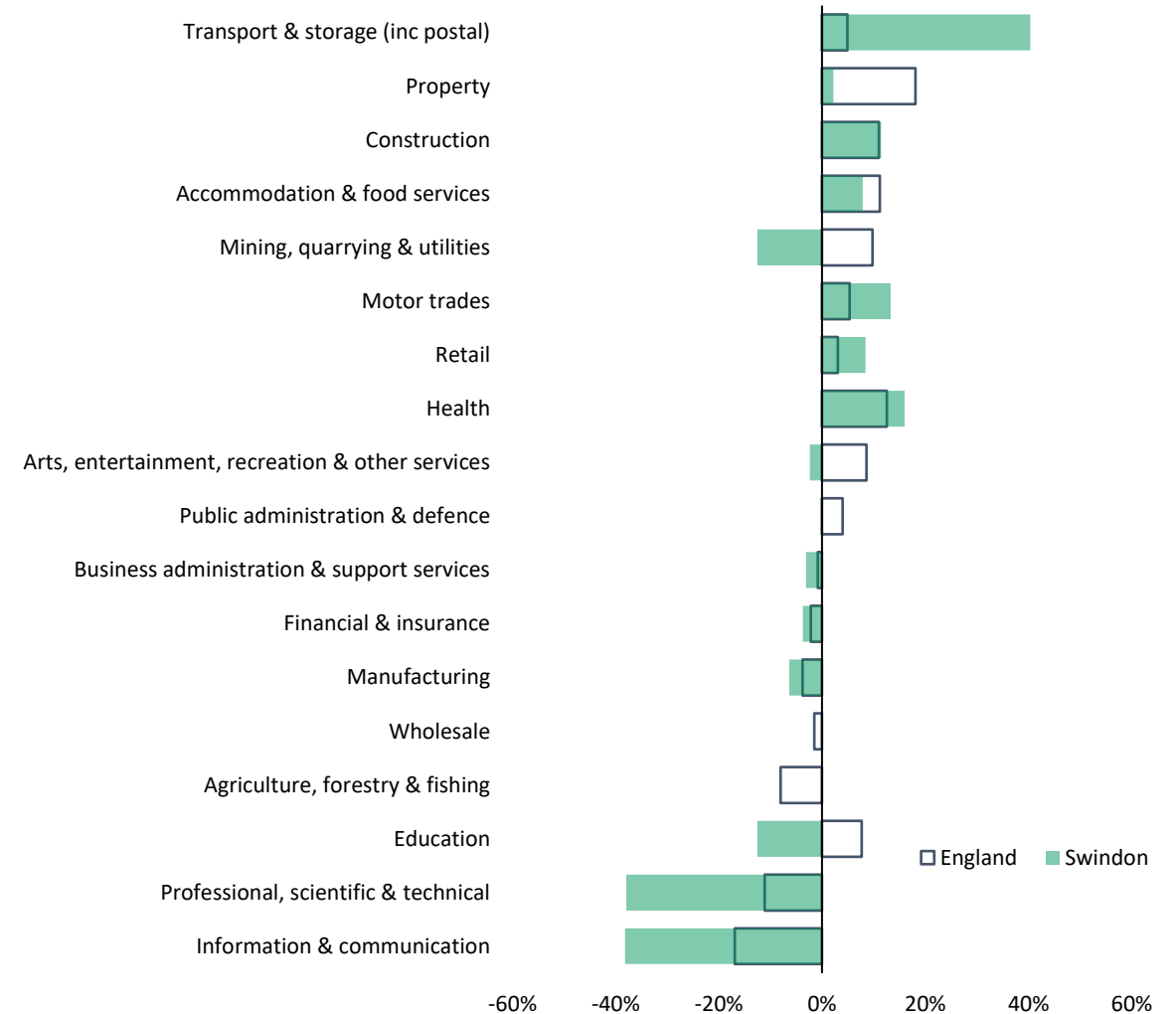
The priority sectors identified based on the historic strengths shown in these sectors at a Swindon and Wiltshire level and are outlined in the table below. Examining the business base of these sectors in Swindon confirms that several of these sectors remain specialised and important to the area.

Priority Sector Businesses Base Analysis, Swindon, 2019-2024

Priority Sector	Number of Businesses, 2024	% Change 2019-2024	LQ
Professional Business Services	1,260	-25%	0.8
Creative Industries	635	-33%	0.9
Cyber Security	500	-42%	1.3
Advanced Manufacturing and Engineering	60	0%	1
Defence	55	-15%	1.2
Environmental Technologies	30	0%	1.1
Life Sciences incl Natural Sciences	10	-33%	0.5

Source: ONS UK Business Counts, 2019-2024

% Change in Businesses Population by Broad Sector, Swindon and England, 2019-2024



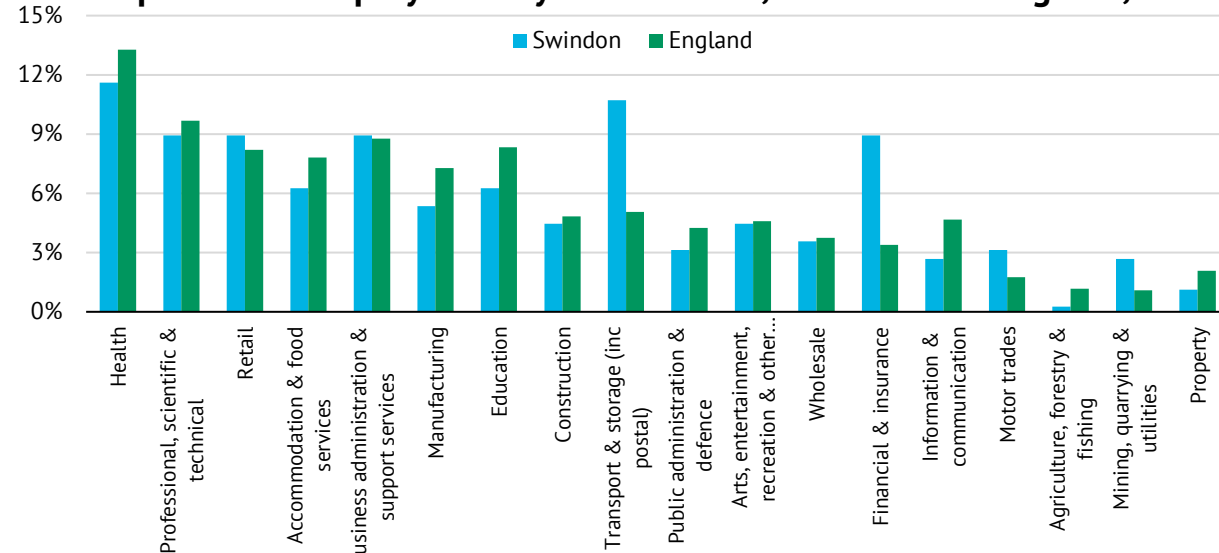
Executive Summary: Swindon's Economy

Employment

In 2023 (latest data) there were **112,000 filled jobs** in Swindon. Some of the largest employing broad sectors include **health** (12% of jobs, 13,000 jobs) and **transport and storage** (11% of jobs, 12,000 jobs), no other sector accounts for more than 10% of jobs. Compared to the national employment market, there is some overrepresentation in Swindon in the financial and insurance sector and in transport and storage.

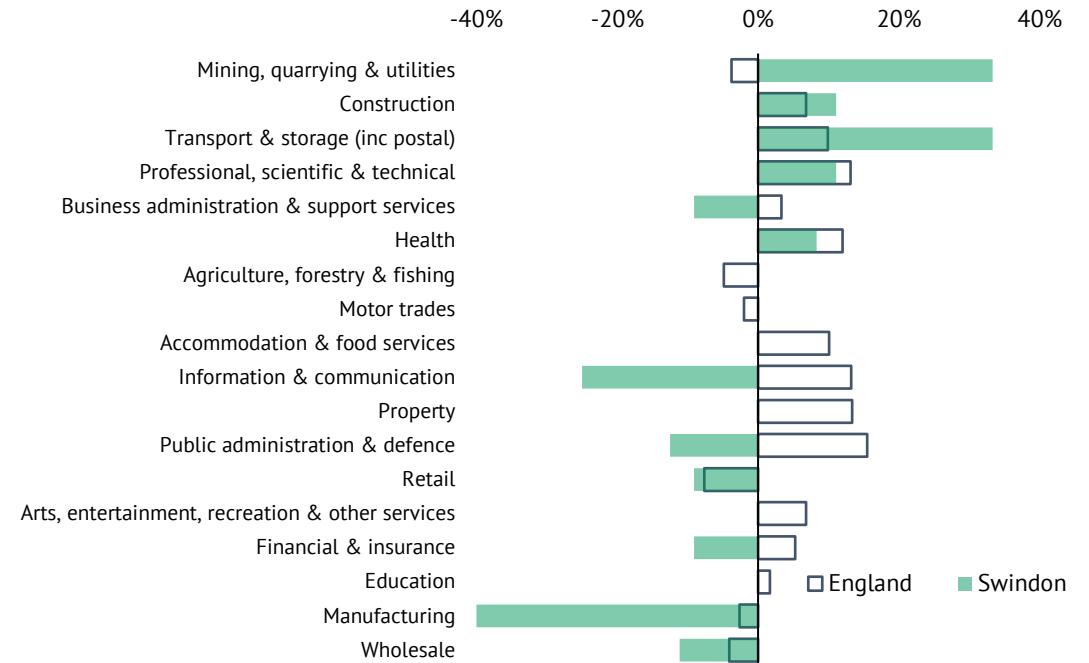
There has been an employment contraction from the 2018 position of **-6,000 jobs or -5%**. This suggests some labour market challenges and runs counter to the national rate of change +5% over this period. On a sector level, employment has most clearly contracted in manufacturing (-40%,) and information and communication. It is likely the closure of the Honda factory played a role in losses in Swindon's manufacturing jobs and therefore likely this is a significant factor behind the overall job loss figure recorded between 2018-2023.

Proportion of Employment by Broad Sector, Swindon and England, 2023



Source: Business Register and Employment Survey, ONS, 2023

% Change in Employment by Broad Sector, Swindon and England, 2018-2023



Priority Sector Employment Analysis, Swindon, 2018-2023

Priority Sector	Total	% Change 2018-2023	LQ
Professional Business Services	20,000	-5%	1
Creative Industries	3,000	0%	0.7
Advanced Manufacturing and Engineering	3,500	-50%	1.3
Defence	2,000	-33%	1.6
Cyber Security	2,250	-25%	0.8
Environmental Technologies	1,250	39%	1.8
Life Sciences incl. Natural Sciences	4,330	70%	4.9

Executive Summary: Swindon’s People

Population and Demographics

Swindon has a **population of 238,417 people**, as of 2023 mid-year population estimates. 60% of the population are of working age, equivalent to 152,231. Compared to the national position this is a slightly lower proportion of working age residents with it being 63% for England.

Population growth has been in line with the rate of change seen nationally over the past five years of data (2018-2023), with a growth of **+3.6%** in Swindon compared to a +3.2% growth rate nationally. Over 65s have largely driven the change in population in Swindon growing at 11% since 2018. Nationally this group also accounts for the largest rate of population growth, though growing at a lower 7% rate.

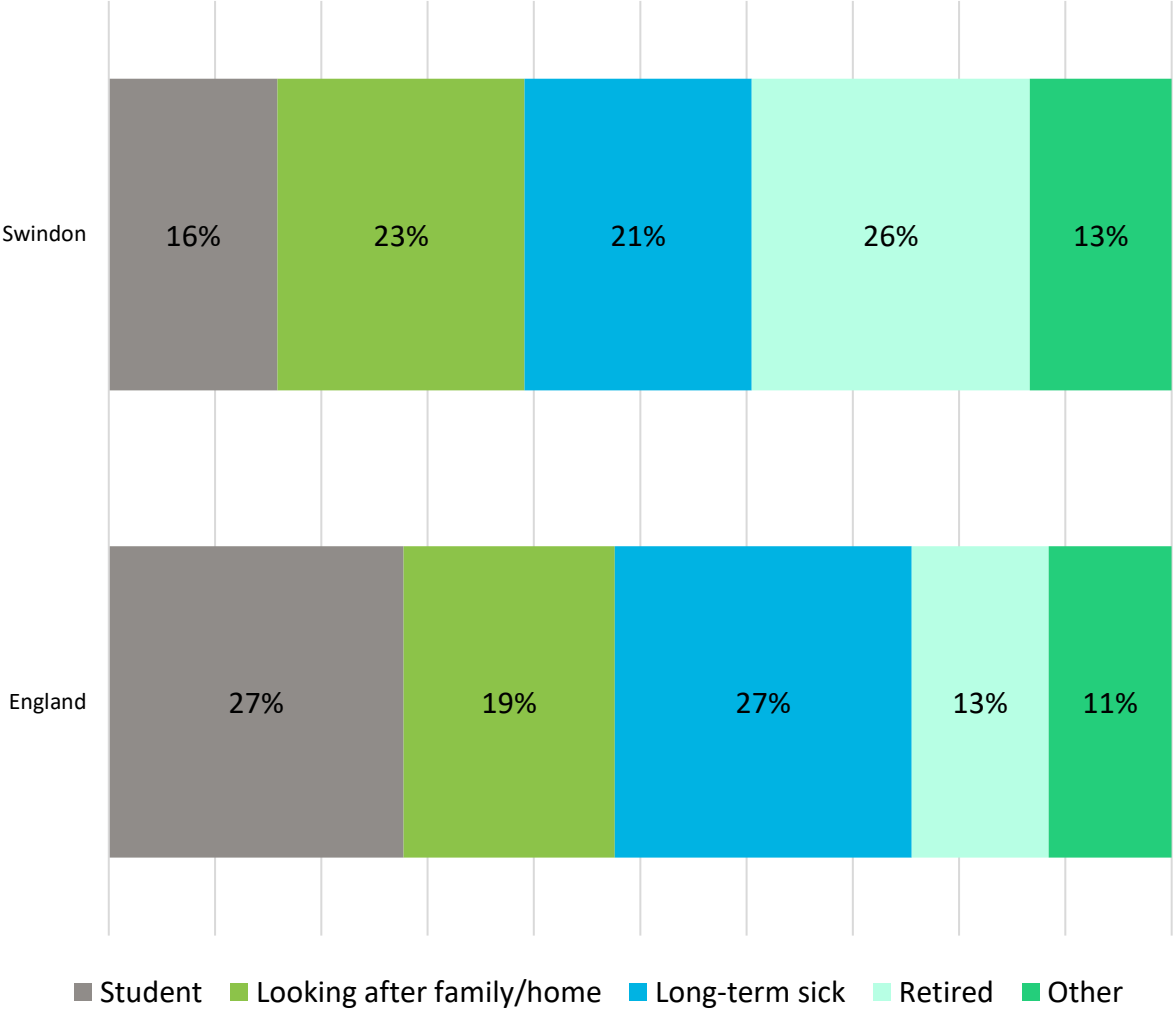
Labour Market

In 2024, **116,500 people in Swindon were classed as ‘economically active’**, equating to 85% of the population , a higher rate than reported nationally of 79%. The economic activity rate has grown since 2022 from 81%. This highlights an increasingly tight labour market. Swindon’s employment rate is 78% as of 2024 and has stayed the same for the past 5 years and is slightly higher than the national employment rate of 77%. The economic activity rate is an expression of the number of people active in the labour market, whether in work our out of work (but looking for employment), the employment rate is a measure of those in work and excludes individuals currently outside of employment.

Of those who are economically inactive, a large proportion of people are retired (26%) or looking after family/ home (23%). This presents challenges of encouraging people to stay in the workforce for longer or encouraging people to contribute to the economy in other meaningful ways, such as volunteering. 21% of Swindon’s economically inactive population reported long-term sickness as the cause of their economic inactivity in 2024, this is lower than the rate seen nationally, 27% but nevertheless efforts may be made to support this cohort where possible back into the labour market with the right targeted interventions. This would support in increasing supply in a currently tight labour market - as of 2024, the unemployment rate in Swindon was 2.6% compared to 3.8% nationally.

Source: ONS Annual Population Survey, 2024

Reason for Economic Inactivity, Swindon and England, 2024



Executive Summary

Executive Summary: Swindon's People

Labour Market

Resident and workplace earnings in Swindon are roughly the same (£32,900 compared to £32,800) due to it being a large commercial centre with high paid employment opportunities.

Both resident and workplace earnings in Swindon are higher than earnings reported at the national level (resident: £31,840 workplace: £31,875). This greater level of earnings in Swindon is likely a reflection of the high productivity compared to other areas in the country.

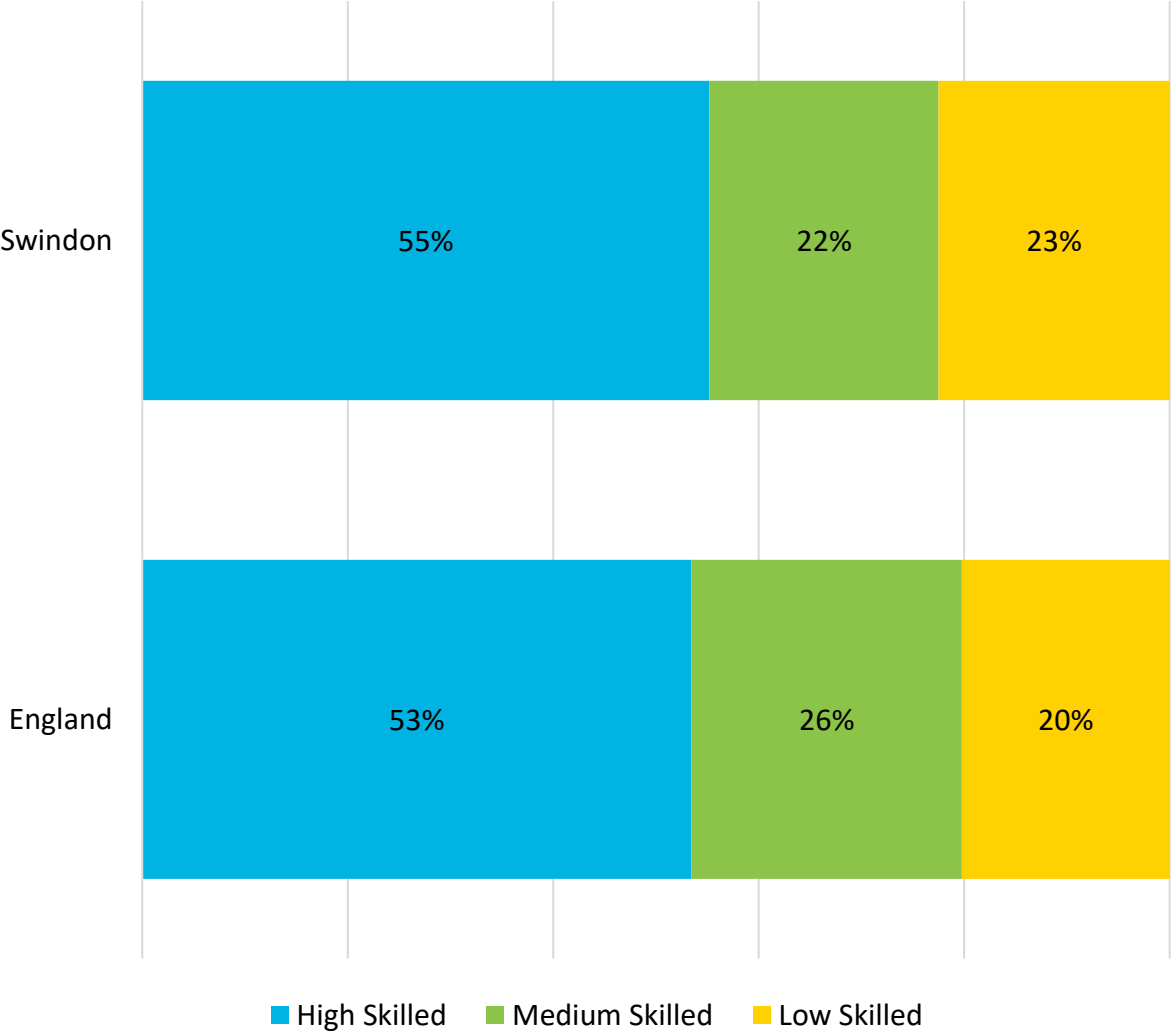
Skills and Education

Nearly all schools in Swindon were rated 'Good' or 'Outstanding' (89%) by OFSTED as of 2024, which is higher than the national average (82%). There were also a smaller proportion of schools rated 'Inadequate' (10% compared to 16% nationally).

The number of people educated to RFQ Level 4+ in Swindon has increased since 2018 from 32% to 37% in 2023. However, this proportion is much lower than Wiltshire (41%) and England (47%). The number of people with no qualifications has decreased since 2018 from 8% to 6% in 2023 and is in line with the national rate.

In 2024, 55% of residents were occupied in high skilled occupations compared to 53% nationally. There has been significant growth in the number of people in Swindon in high skilled occupations since 2021, a 23% increase by 2024. This is higher than Wiltshire (+16%), and much higher than the national growth rate (+5%).

Resident Occupational Levels, Swindon and England, 2024



Executive Summary

Source: ONS Annual Population Survey, 2024

Executive Summary: Swindon's Places

Commercial Property

The table below provided a summary position of the commercial property market in Swindon across a range of commercial property types, all metrics use a five-year average:

Swindon's Commercial Property Market, 2024

Property Type	Rent per sq ft	Vacancy Rate	Existing sq ft
Industrial	£7.13	7.7%	27m
Light Industrial	£8.51	4.9%	2m
Office	£14.96	11.4%	6m
Retail	£20.19	2.0%	8m

Residential Property

The total housing stock in Swindon in 2023 was 101,958. Growth in house prices in Swindon has been rising faster than the national average and most of the comparator areas. The current median house price in Swindon is £265,000 compared to £327,000 nationally. Housing in Swindon is relatively affordable, with a Housing Affordability ratio of 7.5 compared to 9 nationally. This suggests homes in Swindon cost on average 7.5 times the median gross annual income in the local authority compared to 9 times on average for England.

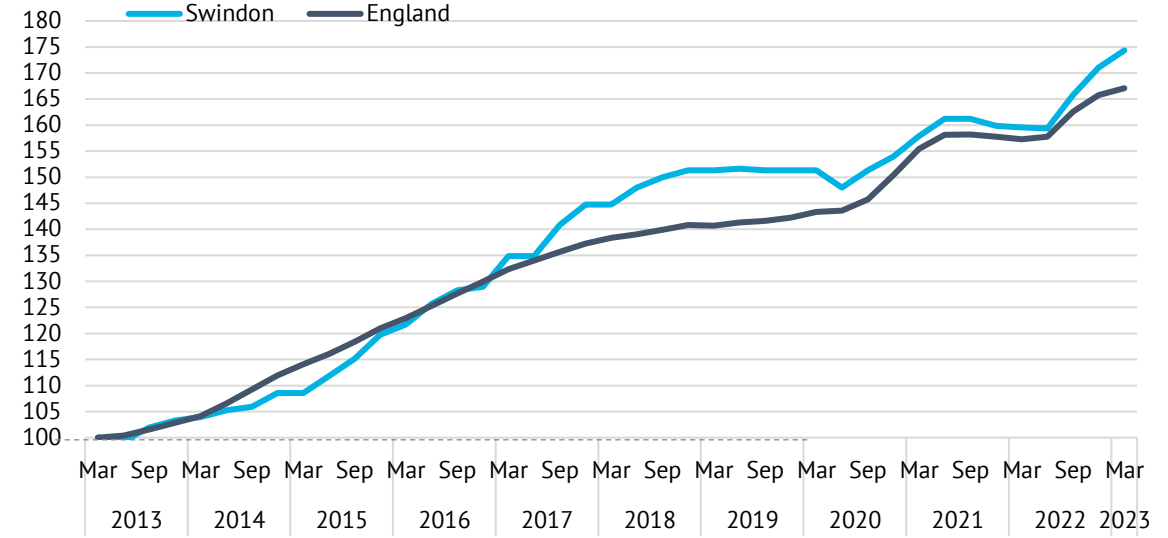
Over the last decade, where data is available (2013-2023), house prices in Swindon rose by 74%, higher than the rate of growth seen nationally – 67%. On average, this equates to an average annual increase of 7% per year.

64% of residents in Swindon own their own home. This is slightly more than the national average (61%). Residents are also more likely to have a mortgage or shared ownership (36%) than the rest of England (31%).

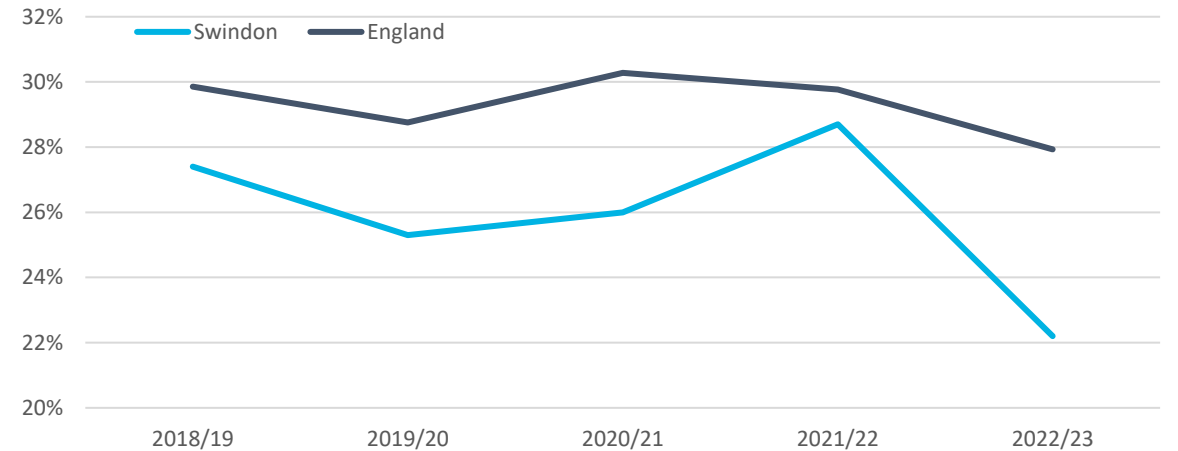
Private rental data suggests Swindon is relatively affordable compared to the England average, though this includes London's higher rental costs. This affordability may be due to higher local earnings rather than lower rents. However, as higher earners are more likely to own homes, the data may overstate affordability for renters. In 2021/22 to 2022/23, rental affordability (as a percentage of earnings) improved from 29% to 22%, a sharper decline than national trends, which also saw increased affordability but to a lesser extent.

Source: CoStar, 2024 ; ONS Average House Price by Housing Type, 2023; ONS Private Rental Affordability, 2023

Indexed Median House Price Change, 2013-2023 (2013=100)



Private Rental Affordability as a % of Earnings, 2018-2023



Executive Summary – Wiltshire

This brief summary provides an overview of the main findings from the 2025 Local Economic Assessment in relation to Wiltshire.

Wiltshire comprises the majority of the Swindon and Wiltshire land area and is a large source of the area's workforce.

Some of the most significant challenges facing Wiltshire are reminiscent of other rural areas across the country, these include an ageing population alongside challenges around connectivity and internet.



Executive Summary: Wiltshire's Economy

Economic Output

Using a gross value added (GVA) metric we include estimate the size of Wiltshire's economy as an expression of the output created in the area less the cost of inputs. Latest data from 2022 estimates Wiltshire's GVA to be **£14.4bn**.

Using real money terms (2019 money value), Wiltshire's economy **grew by 5%** between 2019 and 2022 (latest data). This is an expression of an additional £670m in output from the Wiltshire economy in 2022 than in 2019. This suggests a healthy recovery from the economic disruption caused by the COVID-19 pandemic. This rate of growth surpasses the national trend which saw a +2% rate of growth between 2019 and 2022. We can examine where some of these economic losses occurred through an examination of sectors.

Despite an **overall improved rate**, not all sectors across Wiltshire have experienced an increase in GVA. The agriculture, mining, electricity, gas, water and waste sector for example experienced a contraction during this period of £88m, or a loss of 20%. However, many of the losses have been countered by healthy growth in a diverse range of sectors such as professional, scientific and technical activities where an additional £225m (+23%) of GVA was added between 2019-2022. Manufacturing also saw some healthy growth, +£125m (+9%).

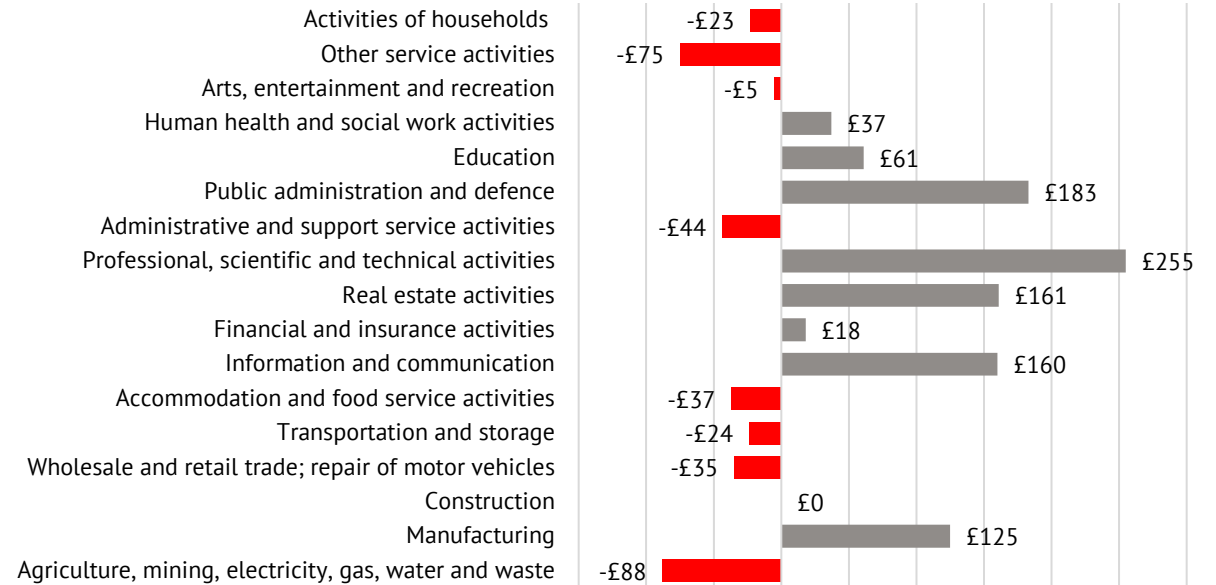
In examining Wiltshire's economy by sector, two stand out. One is real estate, which appears significant in terms of output. However, GVA data for this sector is often influenced by land value increases rather than direct economic contributions like employment or investment. To gain a clearer picture of economic productivity, it is useful to consider other sectors where output is more directly linked to labour and business activity. One such sector is the **public administration and defence** sector accounting for 14% of Wiltshire's output equating to just over £2bn of GVA. Other important sectors include **manufacturing** (11% of GVA, £1.6bn of output), **professional, scientific and technical activities** (10% of GVA, £1.5bn of output) and **wholesale and retail trade; repair of motor vehicles** (10% of GVA, £1.5bn of output).

Productivity

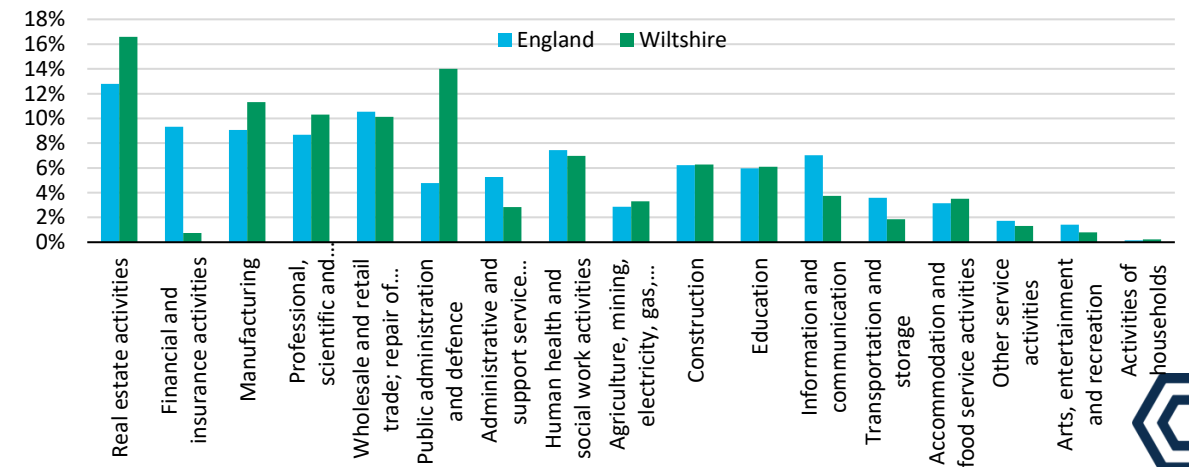
Despite a strong economic recovery outlined above, a **productivity gap persists**, where output per job filled is lower in Wiltshire than it is nationally. Wiltshire ranks 163rd out of the 296 local authorities in England in this productivity metric. With output per hour worked in Wiltshire at £53,893 compared to £62,751 for England. The means a productivity gap of £8,859 per job filled exists between Wiltshire and England. Despite this there has been healthy growth in productivity in Wiltshire of 12% between 2019 and 2022 outstripping growth seen nationally during this period of 8%.

Source: ONS Regional Accounts, 2019-2022; ONS Labour Productivity, 2019-2022

Economic Output Change (£m) in Wiltshire, by Sector, 2019 to 2022



Sectoral Proportion of Economic Output in Wiltshire and England, 2022



Executive Summary: Wiltshire's Economy

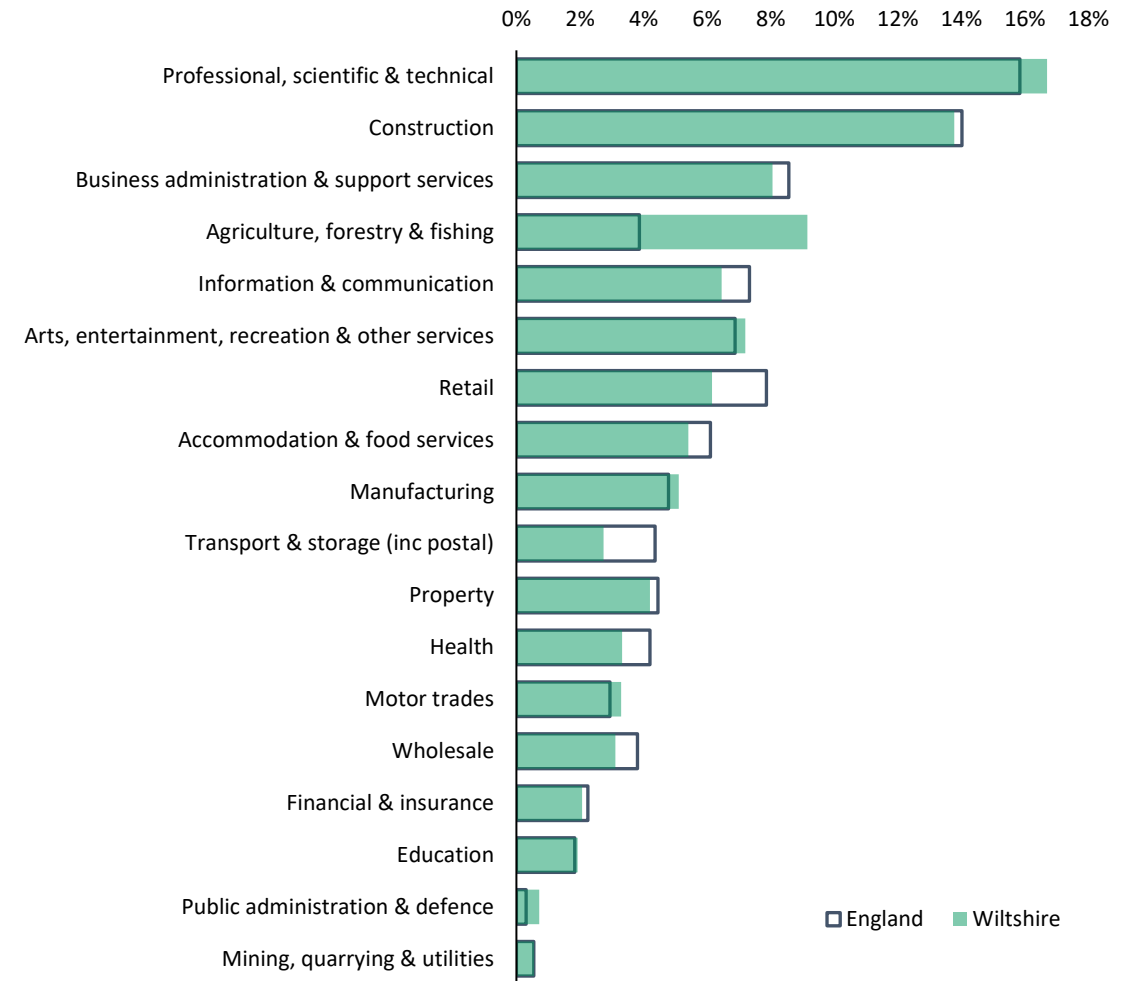
Business Base:

Data from 2024 estimates that Wiltshire has a business base population of **21,520**. The professional, scientific and technical sector accounts for 17% of the business base population in Wiltshire. Across most sectors, Wiltshire aligns closely to the national picture, with slight underrepresentation in transport and storage (3% of Wiltshire's business base, 4% of England's business base) and retail (6% of Wiltshire's business base, 8% of England's business base).

The majority – **98% of businesses in Wiltshire are classed as being micro or small businesses** employing less than 50 people. This is in line with the national position, where 98% of businesses are also either micro or small. There are proportionately more micro firms (0-9 employees) in Wiltshire (90%) compared to the England proportion (89%).

1-year business survival rates are higher in Wiltshire than they are nationally, with businesses in Wiltshire who were established in 2022 having a 94% chance of 1-year of survival compared to 92% nationally. However, it should be noted that as has occurred at the national level, the 1-year business survival rate has fallen slightly in Wiltshire from 95% for businesses established in 2018 to 94% for businesses established in 2022. Wiltshire also has higher longer term survival rates (5 years of survival) than the national average, 43% versus 39%. Though it is important to note that higher rates of long-term business survival are not always positive signs of economic vitality and may instead imply the persistence of less productive and innovative firms remaining active due to lower levels of local competition. This in turn results in lower levels of overall firm productivity that can potentially be seen in Wiltshire's lower productivity levels – though further research would be required to confirm this hypothesis.

Proportion of Businesses by Broad Sector, Wiltshire and England, 2024



Source: ONS UK Business Counts, 2019-2024

Executive Summary: Wiltshire's Economy

Business Base:

Between 2019 and 2024, the business base population experienced a **4% contraction**, equating to a **loss of 885 businesses**. At the national level there was a very small rate of growth in the business population (+0.3%).

When considering sectors, a significant amount of the loss of businesses in Wiltshire occurred in the professional, scientific and technical, education and the information and communication sectors. Given the importance of the professional, scientific and technical to Wiltshire's business base this is significant and should be monitored to ensure the sector is not facing large scale and long-term commercial pressured that may lead to further business closures.

Priority sectors

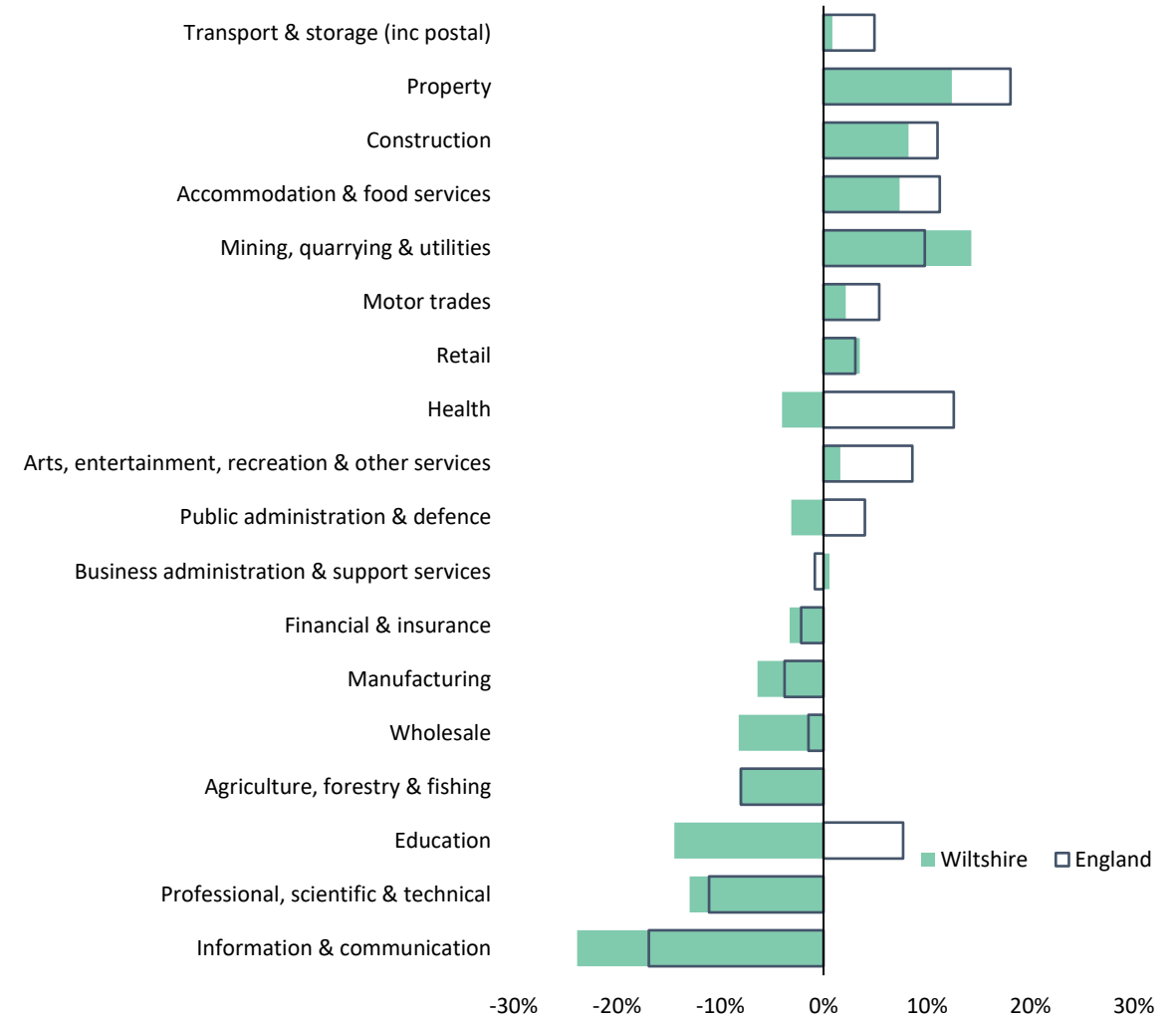
The priority sectors identified based on the historic strengths shown in these sectors at a Swindon and Wiltshire level and are outlined in the table below. Examining the business base of these sectors in Wiltshire confirms that several of these sectors remain specialised and important to the area.

Priority Sector Businesses Base Analysis, Wiltshire, 2019-2024

Priority Sector	Number of Businesses, 2024	% Change 2019-2024	LQ
Professional Business Services	5,025	-8%	1
Creative Industries	2,005	-12%	0.9
Cyber Security	1,050	-29%	0.9
Advanced Manufacturing and Engineering	240	-4%	1.3
Defence	180	-14%	1.2
Environmental Technologies	95	12%	1.2
Life Sciences incl Natural Sciences	65	-7%	2.1

Source: ONS, Business Census, 2019-2024

% Change in Businesses Population by Broad Sector, Wiltshire and England, 2019-2024



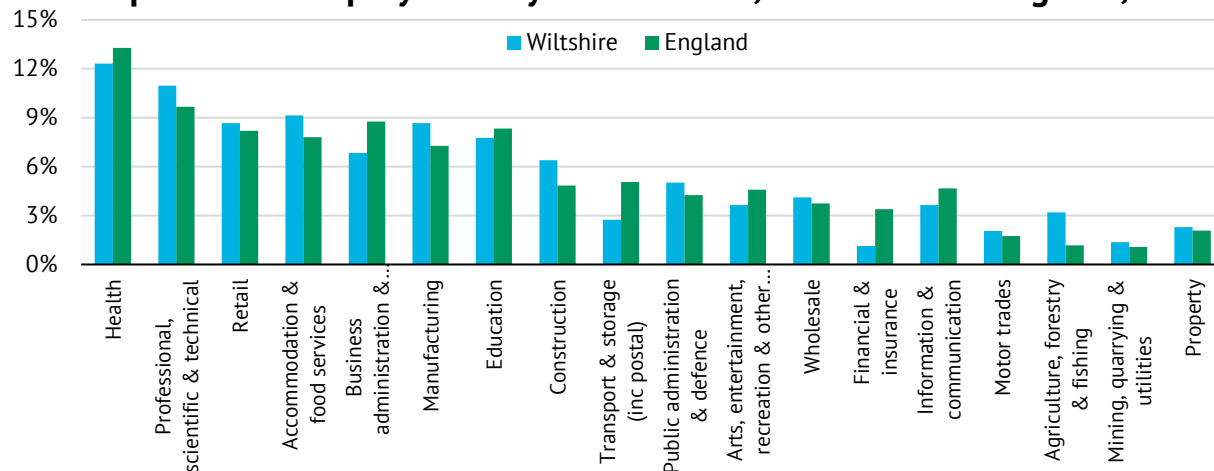
Executive Summary: Wiltshire's Economy

Employment

In 2023 (latest data) there were **219,000 filled jobs in Wiltshire**. Some of the largest employing broad sectors include health (13% of jobs, 27,000 jobs) and **professional, scientific and technical activities** (11% of jobs, 24,000 jobs), no other sector accounts for more than 10% of jobs. Compared to the national employment market, there is some overrepresentation in Wiltshire in the financial and insurance sector and in transport and storage.

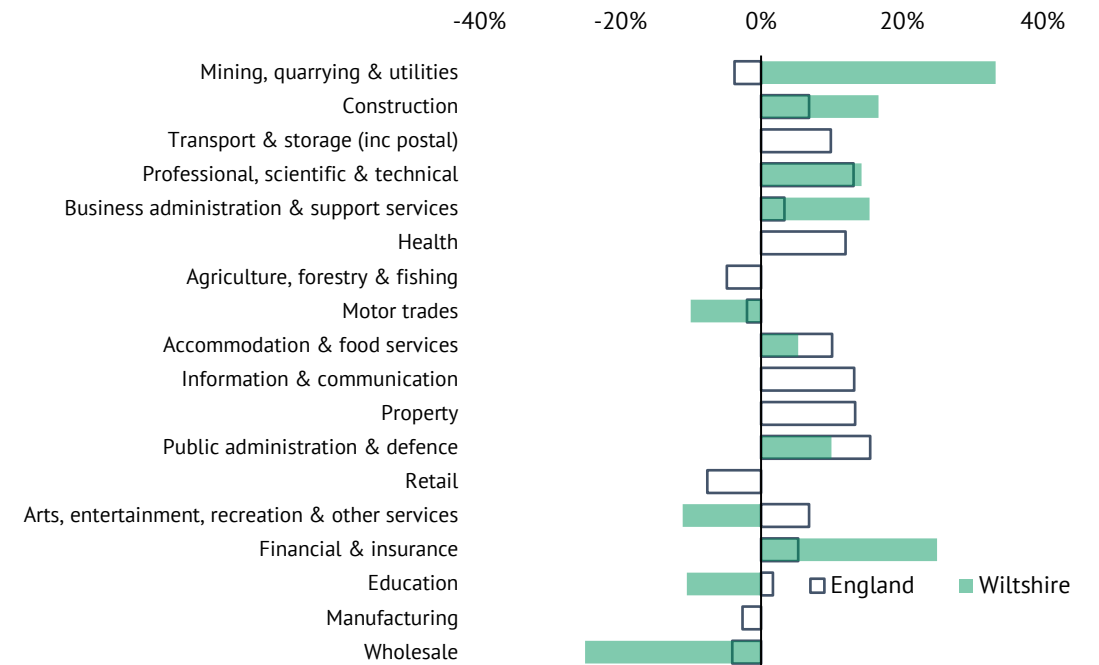
There has been growth in Wiltshire's number of jobs by **+1%** between 2018-2023, equating to an additional **3,000 jobs** in the local authority area. While this is positive this rate of growth falls short of the employment growth rate seen nationally of **+5%**. On a sector level, employment has seen strong growth in mining, quarrying and utilities (+33%) and in the financial and insurance sector (+25%). The financial and insurance sector remains a small sector in Wiltshire, but growth in jobs may suggest the sector is shaping up to establish itself within the local economy. Unfortunately, other sectors have seen employment fall, such as wholesale (-25%), education (-11%), arts entertainment, recreation and other services (-11%) and motor trades (-10%).

Proportion of Employment by Broad Sector, Wiltshire and England, 2023



Source: Business Register and Employment Survey, ONS, 2023

% Change in Employment by Broad Sector, Wiltshire and England, 2018-2023



Priority Sector Employment Analysis, Wiltshire, 2018-2023

Priority Sector	Total	% Change 2018-2023	LQ
Professional Business Services	31,000	11%	0.9
Creative Industries	8,000	14%	0.7
Advanced Manufacturing and Engineering	6,000	0%	1.2
Defence	7,000	17%	1.9
Cyber Security	6,000	0%	0.9
Environmental Technologies	2,000	100%	1.8
Life Sciences incl. Natural Sciences	9,680	103%	5.8

Executive Summary: Wiltshire's People

Population and Demographics

Wiltshire has a population of **517,979 people**, as of 2023 mid-year population estimates. 60% of the population are of working age, equivalent to 309,371. Compared to the national position this is a slightly lower proportion of working age residents with it being 63% for England.

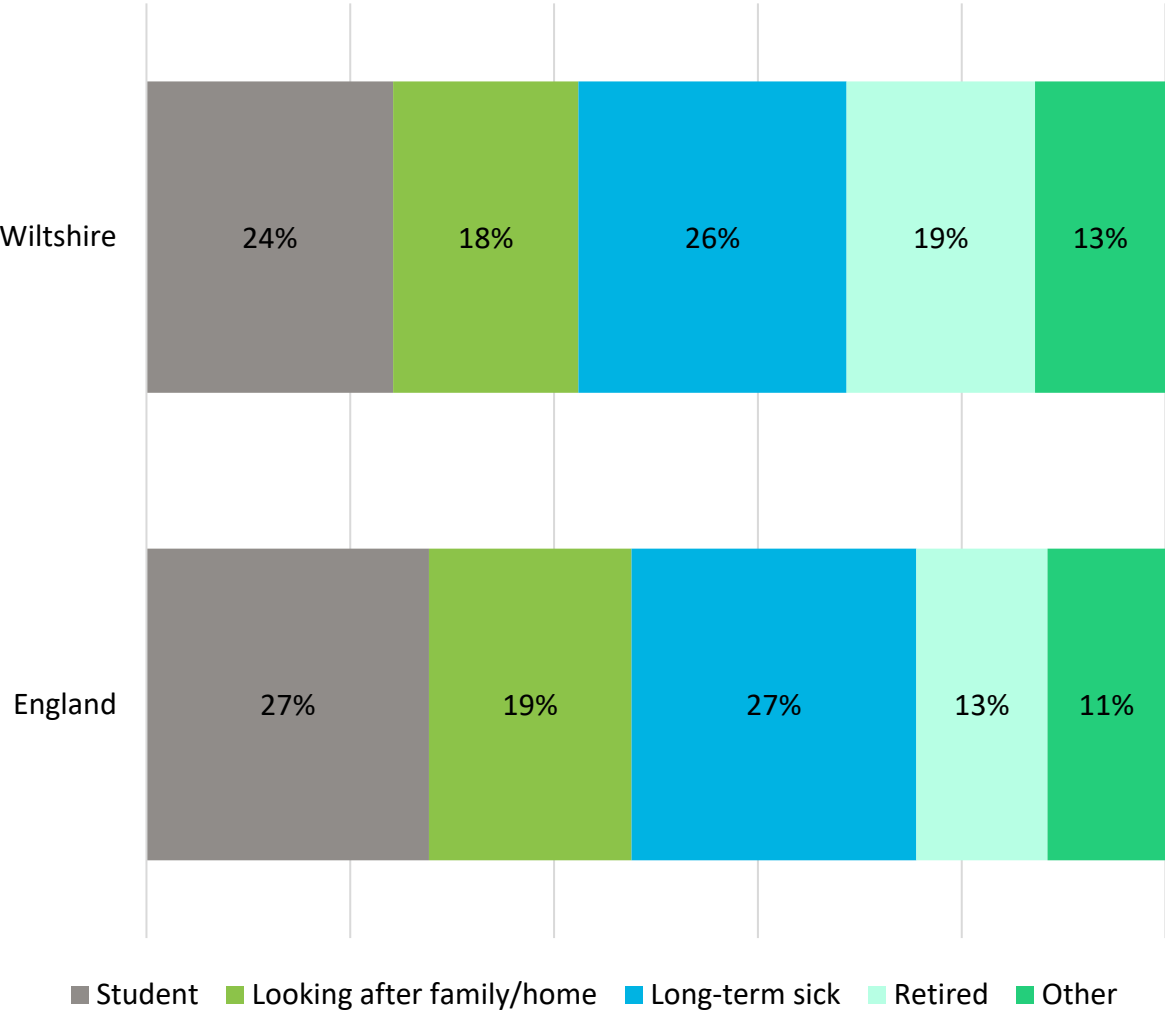
Population growth has been in line with the rate of change seen nationally over the past five years of data (2018-2023), with a growth of +3.9% in Wiltshire compared to a +3.2% growth rate nationally. Over 65s have largely driven the change in population in Wiltshire growing at 11% since 2018. Nationally this group also accounts for the largest rate of population growth, though growing at a lower 7% rate.

Labour Market

In 2024, 231,200 people in Wiltshire were classed as 'economically active', equating to 83% of the population, a higher rate than reported nationally of 79%. The economic activity rate has grown since 2022 from 79%. This highlights an increasingly tight labour market. Wiltshire's employment rate is 77% as of 2024 and rose from 73% in 2019. Wiltshire's employment rate matches the national employment rate of 77%. The economic activity rate is an expression of the number of people active in the labour market, whether in work or out of work (but looking for employment), the employment rate is a measure of those in work and excludes individuals currently outside of employment.

Of those who are economically inactive, a large proportion of people are classed as long term sick (26%) followed by retired people (19%). While Wiltshire's rates of long term sickness as a cause of economic inactivity are in line with national levels, there are likely some interventions that may be put into place to support some individuals back to the labour market who fall into this category. This would support in increasing supply in a currently tight labour market - as of 2024, the unemployment rate in Wiltshire was 2.1% compared to 3.8% nationally.

Reason for Economic Inactivity, Wiltshire and England, 2024



Executive Summary

Source: ONS Annual Population Survey, 2024

Executive Summary: Wiltshire's People

Labour Market

Resident earnings in Wiltshire are 7% higher than workplace earnings (£29,200 compared to £27,200), suggesting residents leaving Wiltshire for work find higher paid opportunities than the earnings offered by workplaces within Wiltshire. Resident and workplace earnings in Wiltshire are lower than national earnings (resident: £31,840 workplace: £31,875), this is likely a cause and symptom of lower levels of productivity reported across Wiltshire.

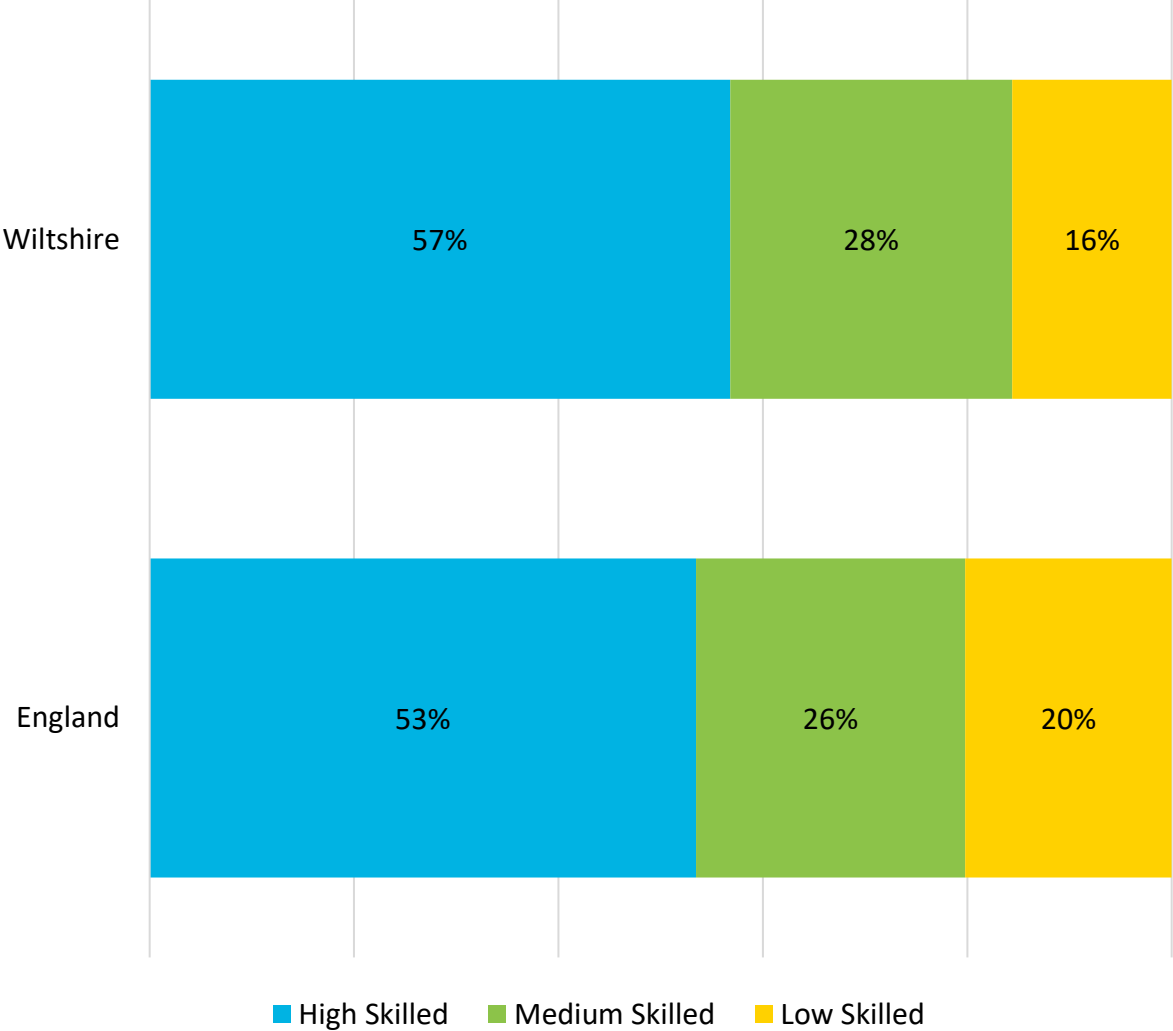
Skills and Education

87% of schools in Wiltshire were rated as either 'Good' or 'Outstanding' by OFSTED as of 2024, which is higher than the national average (82%). There were also a smaller proportion of schools rated 'Inadequate' (13% compared to 16% nationally).

The number of people educated to RFQ Level 4+ in Wiltshire has increased since 2018 from 41% to 48% in 2023. This proportion is higher than England (47%) and therefore implies a relatively skilled population, raising further questions around the local authority's relatively poor productivity. The number of people with no qualifications has remained static at when comparing 2023 to 2018, at 4%, this is lower than the national rate of 6%.

In 2024, **57% of residents were employed in high skilled occupations** compared to 53% nationally. There has been strong rate of growth in the number of people working in Wiltshire in high skilled occupations since 2021, a **16% increase by 2024**. This is higher than the national growth rate of +5%.

Resident Occupational Levels, Wiltshire and England, 2024



Executive Summary

Source: ONS Annual Population Survey, 2024

Executive Summary: Wiltshire's Places

Commercial Property

The table below provided a summary position of the commercial property market in Wiltshire across a range of commercial property types, all metrics use a five-year average:

Wiltshire's Commercial Property Market, 2024

Property Type	Rent per sq ft	Vacancy Rate	Existing sq ft
Industrial	£6.75	6.3%	43m
Light Industrial	£8.23	3.8%	4m
Office	£14.38	7.7%	11m
Retail	£20.86	2.2%	17m

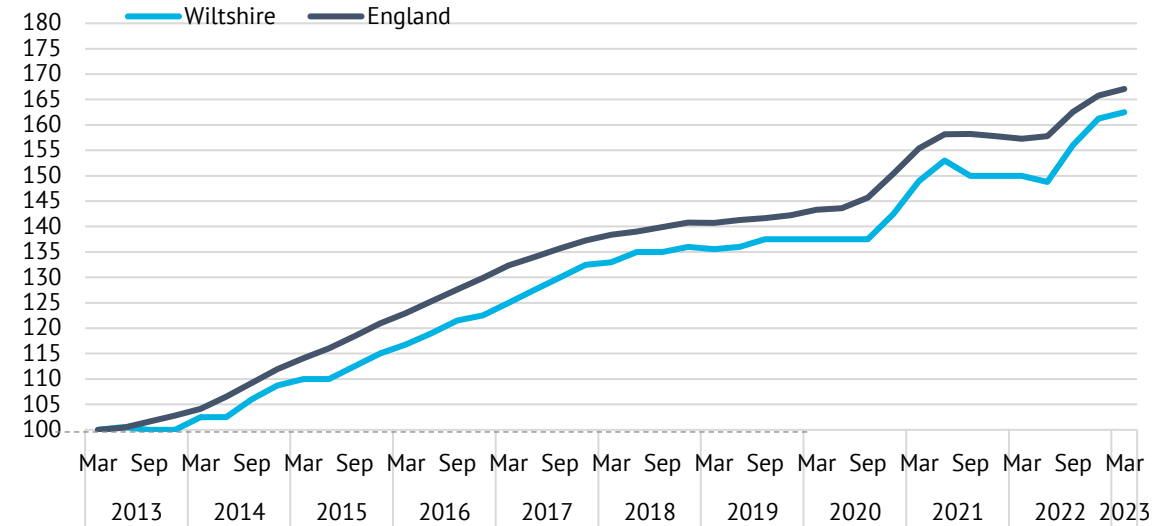
Residential Property

The total housing stock in Wiltshire in 2023 was 231,098. Growth in house prices in Wiltshire has been slower than the national average but faster than some of the comparator areas. The current median house price in Wiltshire is £325,000 compared to £327,000 nationally. Housing in Wiltshire has the same degree of affordability (expressed as earnings to house price) as the national average of 9. Implying houses in the areas on average cost 9 times the median gross annual salary.

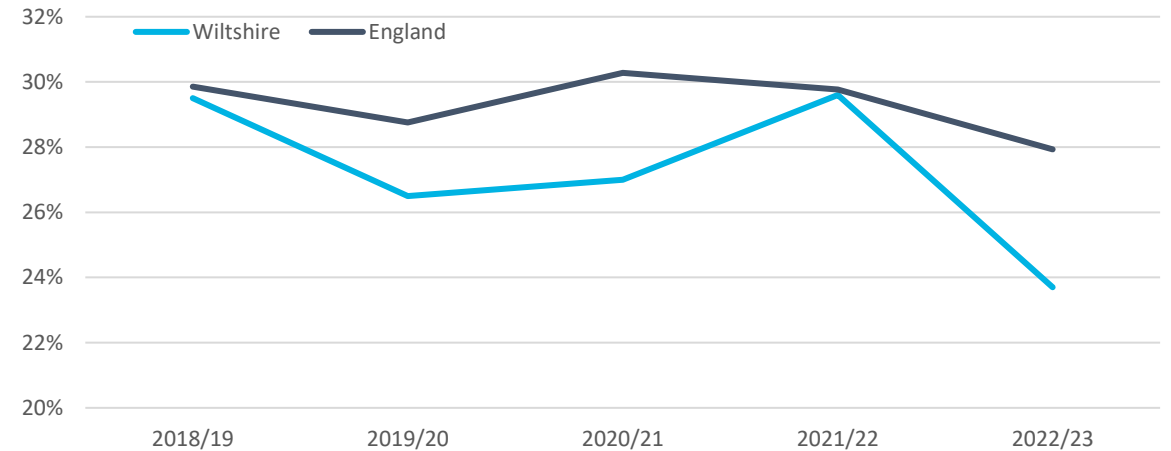
Over the last decade, where data is available (2013-2023), house prices in Wiltshire rose by 63%, a lower rate of growth seen nationally, 67%. On average, this equates to an average annual increase of 6% per year compared to 7% per year nationally.

Private rental data suggests Wiltshire is relatively affordable compared to the England average, though this includes London's higher rental costs. This affordability may be due to higher local earnings rather than lower rents. However, as higher earners are more likely to own homes, the data may overstate affordability for renters. In 2021/22 to 2022/23, rental affordability (as a percentage of earnings) improved from **30% to 24%**, a sharper decline than national trends, which also saw increased affordability but to a lesser extent.

Indexed Median House Price Change, 2013-2023 (2013=100)



Private Rental Affordability as a % of Earnings, 2018-2023



Source: CoStar, 2024 ; ONS Average House Price by Housing Type, 2023; ONS Private Rental Affordability, 2023

2. Introduction and Context

Geographic Context – Swindon and Wiltshire

The Swindon and Wiltshire area is strategically located in central southern England and at the entry point to the South West of England, extending across a diverse mix of urban and rural landscapes. It includes key towns such as Swindon, Salisbury, Trowbridge, and Chippenham, which act as economic and service hubs, alongside a network of smaller and market towns including, Amesbury, Bradford on Avon, Calne, Corsham, Cricklade, Devizes, Downton, Ludgershall, Malmesbury, Marlborough, Melksham, Mere, Pewsey, Royal Wootton Bassett, Tidworth, Tisbury, Warminster, Westbury and Wilton. This diverse landscape contributes to the region's distinct character and economic mix.

The area is well-served by strategic transport infrastructure. The M4 motorway runs through the northern part of the area, linking Swindon to London and South Wales, while the A303 provides vital east-west connectivity through southern Wiltshire. Other key road links include the A350, which runs north to south through the county, supporting freight and logistics movements. The rail network complements this connectivity, with mainline services connecting Swindon and Chippenham to London Paddington and Bristol, as well as Salisbury to London Waterloo and the south coast as well as South Wales and further south west.

Within this context, the three identified Growth Zones—the Swindon M4 Growth Zone, the A350 Growth Zone, and the Salisbury A303 Growth Zone — represent key areas of focused economic activity and development prospects. These zone are positioned around strategic transport corridors to maximise accessibility and economic potential.



Infrastructure

- Railway
- Motorway
- A Road
- Local Authority Boundary

Growth Zones

- GZ - Swindon M4
- GZ - A350
- GZ - A303

Notes: The growth zones were defined using lower super output areas which can be used to access employment data from BRES. Business count data are only available at middle super output area, therefore there will be some boundary discrepancies.

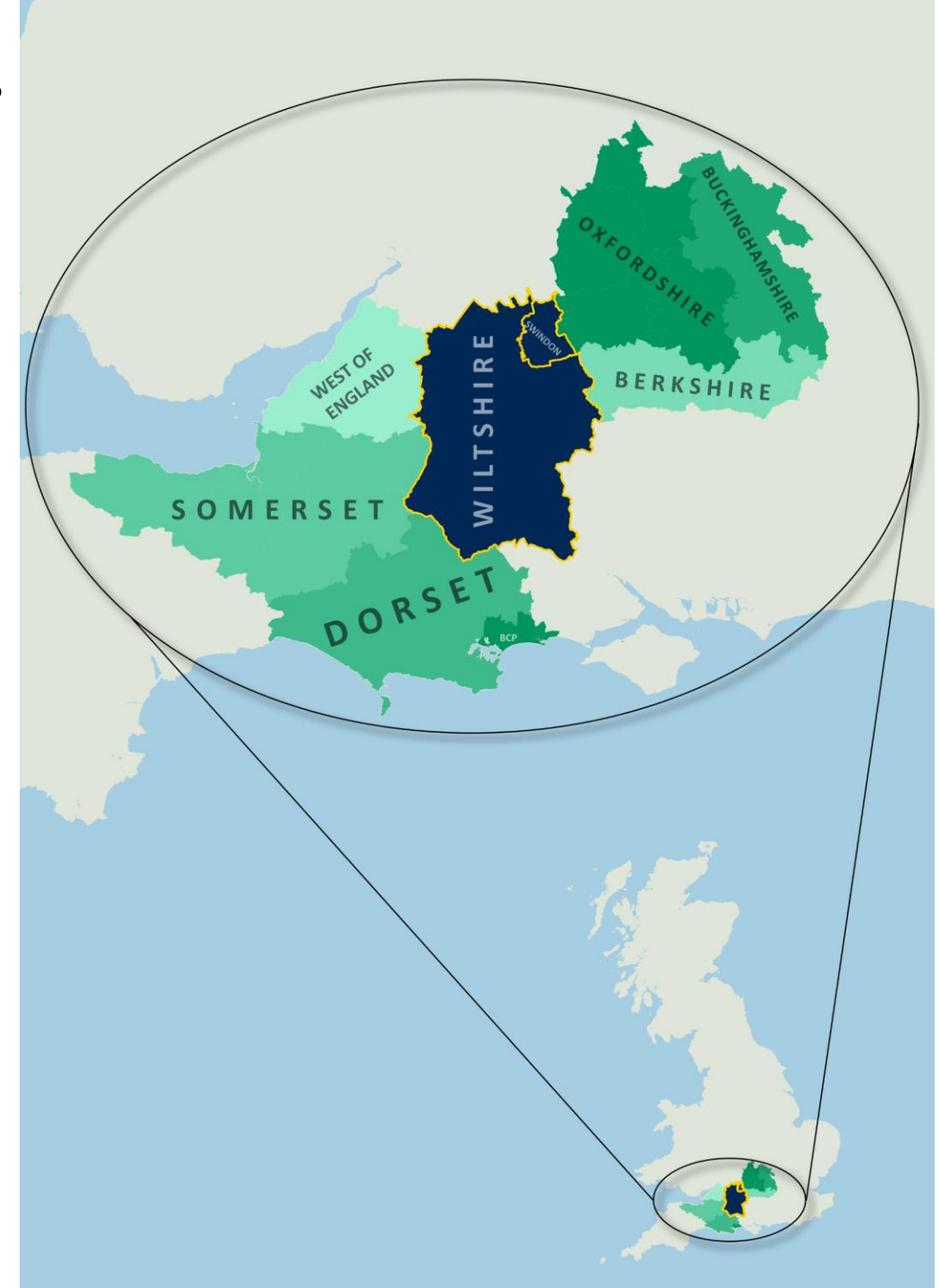
Geographic Context – Comparators and Benchmarks

To provide meaningful context for understanding the economy of Swindon and Wiltshire, this local economic assessment (LEA) includes several comparator geographies. These areas have been carefully selected to offer a diverse yet relevant basis for benchmarking. The selected comparator areas are the South West and South East of England, reflecting local authorities and combined authority areas with economic characteristics that can highlight similarities, differences, and areas of opportunity for Swindon and Wiltshire. The inclusion of Dorset and Somerset is particularly relevant given the potential for a devolution deal involving these areas and Wiltshire Council. The selected comparator areas are:

- BCP (Bournemouth, Christchurch, and Poole)
- Buckinghamshire
- Dorset
- Somerset
- Thames Valley Berkshire
- West of England
- Oxfordshire

These comparators provide insights into key economic trends, sectoral strengths, and regional challenges that help position Swindon and Wiltshire within the broader economic landscape. Additionally, the analysis draws comparison with the national economy by benchmarking against England as a whole.

This approach ensures that the economic performance, strengths, and opportunities in Swindon and Wiltshire are evaluated in the context of broader regional and national dynamics, offering a comprehensive understanding of its competitive position.



Policy Context

This policy appreciation provides an understanding of where Swindon and Wiltshire currently sits relative to the local, regional and national policy agenda. It informs interventions to be developed that align with current goals.

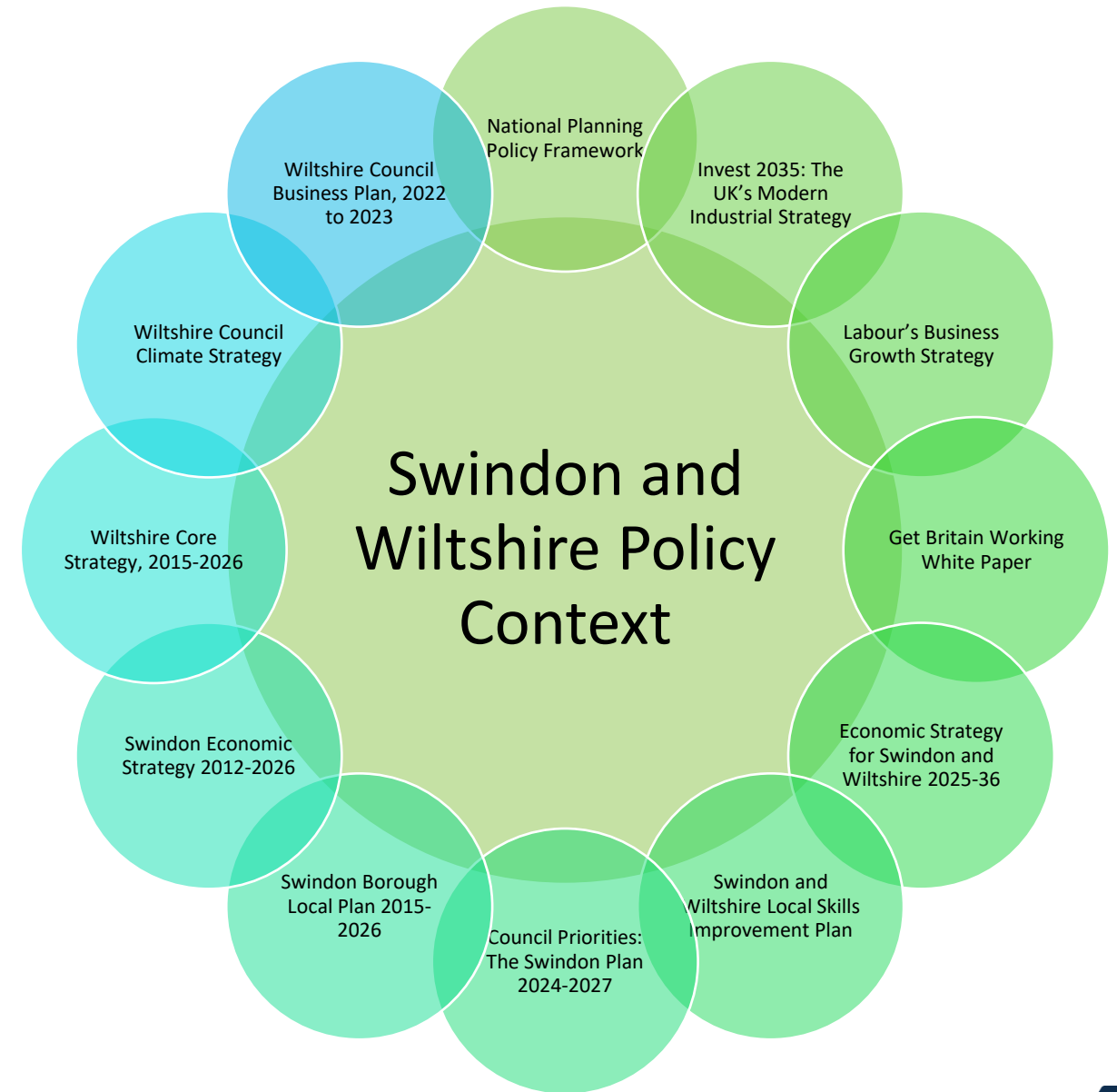
The most relevant policies to Swindon and Wiltshire's economy, are highlighted on pages 27-32. This includes national and local policies. This is not a full comprehensive list of every policy that will have an impact on Swindon and Wiltshire's economy. However, the policies listed provide a broad overview of the most pressing strategic priorities and plans.

The new Labour Government came into power in July 2024, and this indicates a changing policy landscape which Swindon and Wiltshire will need to respond to. The new government have released five policy documents of relevance to this Local Economic Assessment since July.

In summary, there are 5 missions of the Labour government, including to "Kick Start Economic Growth" and the **Business Growth Strategy** which aims to ensure that businesses are at the forefront of driving the five national missions. The **Invest 2035 Strategy** aims to create conditions to capture a greater share of investment in strategic sectors and motivate domestic business to boost investment and scale up growth. The **Back to Work Plan** introduces a major programme of reform to support more people into work and to deliver economic stability. The **Get Britain Working White Paper** sets out plans to get economically inactive people back into employment.

Another crucial policy development has been the revision of the **National Planning Policy Framework (NPPF)**, 2023. This outlines key updates to UK planning policy with the goal to support sustainable economic growth through the encouragement of the development of modern industries.

At the Swindon and Wiltshire level, a new economic strategy for the area has been released, which focuses on 5 key economic indicators needed to deliver a better and thriving economy, a fairer and resilient society, and communities underpinned by greener and sustainable infrastructure. The area also has a Local Skills Improvement Plan, which provides a selective skills analysis of chosen sectors from employee perspectives and identify skills needs within employers and within post 16 educational provision that may be met with additional non-core curricula delivery.



Policy Context – National

Plan for Change, 2024 – 5 National Missions

- The manifesto sets out 5 national missions for the new Government, including aims to: build and NHS fit for the future, kickstart economic growth, make Britain a clean energy superpower, reduce violent crime, and break down barriers to opportunities.
- On economic growth the Labour Party commits itself to taking a sectoral approach, backing what makes Britain great with its excellent research institutions, professional services, advanced manufacturing and creative industries. Furthermore, Labour commits itself to getting Britain building again, with the promise of 1.5 million new homes over the next parliament. Such commitments include reforming the National Policy Planning Frameworks and resourcing mandatory housing targets across the country.
- The manifesto sets out a new statutory requirement for Growth Plans that cover towns and cities across the country, where local leaders will work with major employers, universities, colleges, and industry bodies to produce long-term plans that identify growth sectors and put in place the programmes and infrastructure they need to thrive.



Labour's Business Partnership for Growth



- Labour's Business Growth Strategy focuses on deepening Labour's partnership with businesses, ensuring they have a strong voice in decision making. It aims to ensure that businesses are at the forefront of driving Labour's 5 national missions (outlined above), as well as playing a key part in day-to-day departmental consultations.
- It sets out the role of government and business in ensuring this, identifying the role of government in providing stability, integrity and certainty; setting the strategic direction; removing the unnecessary barriers such as restrictive planning rules; and delivering growth everywhere; focusing on powering up all parts of the country.
- The Business Growth Strategy will help contribute to Labour's 5-point plan for growth, which was part of the Labour Government's election Manifesto. The 5 points include putting economic stability first, backing British business, getting Britain building again, kickstarting a skills revolution and growth everywhere and making work pay.

National Planning Policy Framework (NPPF)

In 2023, the UK Government published the revised version of the **National Planning Policy Framework (NPPF)**. The NPPF provides a summary of all the Government's planning policies for England and how they should be applied. When Labour took over in 2024, the Government released a list of proposed reforms to the current NPPF. This included an increased emphasis on the proactive support for sustainable economic growth, encouraging development of modern industries and infrastructure such as laboratories, gigafactories and digital infrastructure. Ultimately, improved digital infrastructure will help to support the growth of knowledge, creative and technology driven sectors.

Policy Context – National

Invest 2035: The UK's Modern Industrial Strategy

- Growth is the key mission of the new Labour government, and the new industrial strategy is designed to be central to that mission. The strategy aims to respond to rapid changes in the global economy and provide a launchpad for UK business competitiveness. The strategy sets out the following objectives:
 - Drive growth
 - Shape the economy to take advantage of the UK's strengths
 - Achieve sustainable growth aligned with net zero targets
 - Unlock the potential of the UK's cities and regions
 - Achieve economic security and resilience
- The strategy focuses on 8 growth-driving factors. The government will design ambitious, targeted 'Sector Plans' for each of these in partnership with business, devolved governments, regions, experts and other stakeholders through bespoke arrangements tailored to each sector. These are: Advanced Manufacturing, Clean Energy Industries, Creative Industries, Defence, Digital and Technologies, Financial Services, Life Sciences and Professional and Business Services.



Get Britain Working White Paper, 2024



Get Britain Working

CP 1191

- This paper details the Labour Government's plan to get economically inactive people back into employment and raise the UK's employment rate to 80%. They want to build an inclusive and thriving labour market where everyone has the opportunity of good work and the chance to get on with work, in turn improving living standards and ensuring public services can be funded. The approach is based on 3 core pillars:
 - A modern industrial strategy and local growth plans to create more good jobs in every part of the country.
 - Improving the quality and security of work through the Plan to Make Work Pay.
 - The biggest reforms to employment support for a generation, bringing together skills and health to get more people into work and get on in work.
- This paper focuses on the third pillar. The government will provide support to help people enter new markets and higher paid, higher quality work, close the gender participation gap and supporting employers to promote healthy workplaces and to recruit and retain workers with health conditions and disabilities. This paper also mentions the Youth Guarantee, which aims for everyone aged 18-21 to have access to further learning, help to get a job or an apprenticeship.

Policy Context – Sub-Regional Policy

Economic Strategy for Swindon and Wiltshire 2025-2036

Opportunities for growth and improved performance:

Place: regenerating principal settlements, supporting the revival of high streets, cultural, and visitor offer through greater and improved town centre living and better working environments.

Priority sectors and clusters: delivering strategic employment sites to drive the growth of Swindon and Wiltshire's priority sectors, attracting new investors as well as extending Swindon's strengths in exporting.

Infrastructure and transport: this is a predominantly rural area which has an important role as part of the UK's strategic transport and logistics network.

Green growth: offering alternative lower-carbon travel aligned to new housing and employment opportunities underpinned by the development and delivery of Local Area Energy Plans.

Skills: improving the employability and employment prospects of residents and workers will help deliver economic growth and increase the wellbeing of Swindon and Wiltshire's people.

• This strategy replaces the Swindon and Wiltshire Local Industrial Strategy which was published in March 2020. It represents the next chapter of Swindon Borough Council and Wiltshire Council working together on their common goals to deliver a better and thriving economy, a fairer and resilient society, and communities underpinned by greener and sustainable infrastructure. The vision for this strategy is "To ensure all our communities benefit from inclusive and sustainable growth, making the Swindon and Wiltshire area world-renowned for its convergence of innovation, entrepreneurialism and great quality of life." The strategy focuses on five key objectives: place-shaping, infrastructure, transport and connectivity, skills and opportunity, and business and priority sector development, all underpinned by innovation and clean growth. The area has three growth zones which have capacity for future growth- the Swindon M4 growth zone, the A350 Zone and the Salisbury A303 Zone.

- The **Swindon M4 growth zone** is the largest and has the highest density of businesses. Swindon is the biggest settlement followed by Chippenham and other market towns include Corsham, and Malmesbury. Key sector strengths in this zone are advanced engineering, financial services, pharmaceuticals and defence including cyber. The M4 underpins the importance of this zone in multiple ways including its role in transport, logistics and distribution.
- The **A350 growth zone** connects north and south Wiltshire by road and benefits from the most train stations. This growth zone is strong in advanced engineering and high value manufacturing, ICT and the visitor economy. Trowbridge is the county town, and other important settlements for economic activity and connectivity include Melksham, Westbury and Warminster. The A350 is one of the most important roads in Wiltshire; it is a primary north-south route with regional significance, connecting the south coast with the M4 and national motorway network.
- The **Salisbury and A303 growth zone** excels in life sciences and defence technologies and can boast the largest concentration of MOD defence research in the UK and a significant life sciences presence. The medieval city of Salisbury is the principal settlement with rich history, attractive retail and visitor environment alongside the health research and technical expertise at the hospital's Foundation Trust. Military towns in this zone include Bulford, Amesbury, Tidworth, Ludgershall, Porton and Boscombe Down. The A303 is a primary route in the area connecting southern England with the south west region, and this connectivity has established Amesbury as an important regional distribution centre.
- The **rest of the Swindon and Wiltshire area** which does not fall within a growth zone also plays an important role in the economy, and its diverse environment contributes 14% of total GVA. It has the capability to grow especially as the result of improvements in digital connectivity, roads, and better and timely connections to the national grid.

Policy Context – Sub-Regional Policy

Swindon and Wiltshire Local Skills Improvement Plan, 2024

- The Local Skills Improvement Plan (LSIP) for the Swindon and Wiltshire area was produced by Business West Chambers of Commerce. It provides a selective skills analysis of chosen sectors from employee perspectives and includes input from local, national and skills sector stakeholders. The LSIP is designed to inform skills supply and demand for the local post-16 education sector.
- The LSIP focuses on the following sectors: Automotive, Health, Social Care and Life Sciences, Agriculture, Construction, Advanced Manufacturing and Engineering, Digitalisation, Net Zero, and Business and Administration. The aims of the LSIP are as follows:
 - To gather and interpret employer intelligence about unmet skills needs within their existing workforce and for new entrants to the workforce.
 - Assist providers to act on this intelligence alongside existing research into and understanding of shortages, local and occupational priorities, and known to change to sectoral needs.
 - Help with decision making for potential changes to existing core post-16 technical provision, to help close the gap between formal learning and work readiness.
 - Identify skills needs within employers that may be met with additional non-core curricula delivery.

Policy Context – Local Strategy

Council Priorities: The Swindon Plan 2024-2027

- Swindon Borough Council created this plan with three big priority missions to carry out over the next decade. Each mission will be addressed through themes and objectives. Progress against each of these objectives will be monitored through performance measures and progress against deliverables:
 - **Build a fairer Swindon** – make Swindon a fairer place, reduce disadvantage and reduce big disparities in life expectancy, education levels and social justice. This will be addressed through creating stronger and safer communities, improving health and wellbeing and improving education and skills.
 - **Build a better Swindon** – create a town ready for the challenges of the coming decades. Where possible, lead town centre improvement and create more affordable housing in partnership with the private sector. This will be addressed by supporting everyone to have a decent home, creating a place where businesses can thrive, by defining the future of Swindon Town Centre, protecting Swindon's heritage and leisure/ open spaces and by keeping Swindon moving.
 - **Build a Greener Swindon** – to fully play their part as a council and town in combatting climate change. Includes working with communities to find new ways of doing things that help the natural environment. This will be addressed by leading the way towards a net zero borough by 2050, greener planning and transport and enhancing biodiversity.

Swindon Borough Local Plan 2015-2026

- The Swindon Borough Local Plan 2026 is the main planning policy document for the borough. It sets out how much housing, employment and retail development the borough needs up to the year 2026 and where this should be. The plan also sets out what infrastructure will be needed to enable this development to take place. It includes policies to ensure development is of the highest quality, avoids environmentally sensitive locations, respects the existing built environment and meets the needs of present and future residents. It has a key role in realising the economic advantages of Swindon and in helping to address those aspects in which the Borough is comparatively weak, whilst at the same time conserving and enhancing the natural and built environment and improving the quality of life for its residents. The local plan includes the following strategic priorities:
 - Deliver growth that is balanced and sustainable, and provides the necessary infrastructure, while addressing the impacts of climate change.
 - Deliver regeneration in a way that meets the needs of Swindon's future but conserves and enhances the best of the past.
 - Recognise the important role of green infrastructure to enhance the quality of life for existing and future residents.

Swindon Economic Strategy 2012 to 2026

- This Economic Strategy for Swindon sets out our ambition to grow Swindon's economy, create jobs and attract investment, to create wealth and prosperity for local people and communities, ensure residents have the skills they need and to promote Swindon as a key location for employment and for people to live.
- The document sets out the vision and high-level ambitions for Swindon's economy over the next 10 years. The next step of the process will involve compiling a detailed action plan identifying specific projects and partners to help achieve the ambitions set out in this strategy.
- The strategy's vision for Swindon's Economy is that by 2026, Swindon will aim to be the UK's most innovative, productive, fastest-growing city, and will grow sustainably by upskilling the workforce to enable businesses to compete, whilst enhancing residents' quality of life.

Policy Context – Local Strategy

(NEW) Swindon Local Plan 2026

- The council is currently in the process of developing a New Local Plan. This will build upon work undertaken on the Local Plan Review and include an update to plan evidence, site information and other supporting documents.
- Once adopted, the New Local Plan will propose a number of updated strategies and policies, including site allocations, to provide sufficient housing, employment and town centre sites to meet the Borough's future needs and guide decisions on planning applications.

Swindon Local Transport Plan (LTP4) 2022-2036

- The LTP4 provides a refresh of the 2011 Local Transport Plan and presents a forward-thinking plan to support the delivery of schemes to facilitate economic growth and regeneration in Swindon. Analysis found that only a small amount of progress was made on the objectives from 2011, and so the refreshed plan identifies several themes and focus areas that have emerged or grown in importance since LTP3 was produced. These are:
 - Climate change and the need to work towards a zero-carbon economy
 - Transport related social inclusion, accessibility and equality
 - The role of new technology
 - The importance of a joined-up approach to land use planning and transport planning
- The plan also revisits some of the transport areas that were not given sufficient focus in the original policies or outcomes related to LTP3. These were:
 - The value of effective highway maintenance
 - The impacts of development, regeneration and growth priorities
 - The location of Swindon and its connectivity with other economic centres

Policy Context – Local Strategy

Wiltshire Council Business Plan 2022 – 2032

- The Wiltshire Council Business Plan outlines the council's ten-year ambition for the county. The business plan sets out their priorities and how they will deliver them by working closely with local communities and partners; as well as investing in technology to make it easier for Wiltshire's residents and businesses to engage with the council.
- Their mission is to ensure the people of Wiltshire are empowered to live full, healthy and enriched lives; to ensure communities continue to be beautiful, exciting places to live; to make sure the local economy thrives and is supported by a skilled workforce; and they lead the way in how councils and counties mitigate climate challenges ahead.
- The plan's guiding themes are prevention and early intervention; improving social mobility and tackling inequalities; understanding communities; and working together.

Wiltshire Core Strategy 2015-2026

- This plan provides up-to-date strategic planning policy for Wiltshire and covers the period up to 2026. The development plan aims to provide for the new jobs required by the local economy and the new homes for the growing and ageing population whilst balancing the need to protect the environment.
- The vision for Wiltshire is to 'create stronger, more resilient communities', by maintaining and increasing the supply of jobs to ensure that Wiltshire remains strong and prosperous. The underlying principles of the strategy seek to manage future development to ensure that communities have an appropriate balance of jobs, services and facilities and homes.
- The Wiltshire Core Strategy sets out a flexible and realistic framework within which local communities can work. It focuses on people and places, fostering a sense of community belonging and self-sufficiency where communities can solve problems locally with the support of the public sector and partner bodies and organisations.

Wiltshire Council Climate Strategy 2022

- The purpose of this strategy is to highlight key areas that Wiltshire can focus on in the next five years as well as setting out some important context on policy and emissions data. The strategy is structured around seven delivery themes:
 - **Transport** – an emphasis will be placed on reducing journeys and moving towards zero emission transport.
 - **Home and the built environment** – New buildings will need to be net zero carbon emitters as soon as possible while existing building will be retrofitted.
 - **Natural environment, food and farming** – Land will be used responsibly and efficiently, with a focus on local food production, habitat preservation, energy generation, absorption of greenhouse gases and provision of homes.
 - **Energy** – Effort to reduce energy consumption will be further enabled through the opportunities allowed by "smart" and digital technologies.
 - **Green economy** – Green jobs of the future will be in significant demand if Wiltshire is to achieve its carbon neutral goals.
 - **Resource and waste** – By using the hierarchy of "reduce, reuse, recycle, recover energy", Wiltshire will see wastage fall.
 - **Carbon neutral council** – The council as an organisation must take a lead role and will itself as an organisation become carbon neutral.

Policy Context – Local Strategy

Wiltshire Climate Strategy Delivery Plan 2025

- The plan sets out the focus for Wiltshire Council's action on climate change for 2025. The plan sets out priorities for one year but also includes some medium and long-term implementation steps that put the plan into context of where Wiltshire is in relation to becoming carbon neutral. Key areas of opportunity for 2025 are:
 - Supporting residents in improving energy efficiency of their homes
 - Supporting developers to build to net zero standards while progressing the Wiltshire Local Plan's policies on net zero and embodied carbon and renewable energy.
 - Produce an Adaptation Plan and develop projects to contribute to ensuring the county is prepared for the impacts of climate change
 - Develop an Offsetting Strategy and projects to help the council offset its residual emissions, and encourage others in Wiltshire to do the same
 - Embedding climate considerations as business as usual for the council, including carbon literacy training
 - Develop a Local Area Energy Plan, including supporting community-led energy projects and Adopt and implement the 4th Local Transport Plan
 - Continue the council property carbon reduction programme, and implement a roadmap to scope 3 emissions reduction

Wiltshire Council Local Transport Plan (LTP4)

- The plan sets out the Council's strategic objectives and policies for transport across Wiltshire and covers the period from 2025 to 2038. The plan's vision is for "a safe and connected transport system which protects the county's unique built, natural and historic environment making this accessible for all, and supports sustainable economic growth across Wiltshire's communities and contributes to a low carbon future." Steps taken to achieve this mission include:
 - Avoiding unnecessary travel by enabling easier access to services, jobs and other destinations
 - Shift to more sustainable modes of transport
 - Improving vehicle, fuel and network efficiency
 - Empowering people with the skills, knowledge and motivation they need to safely access more sustainable and healthier transport.

Wiltshire Local Plan 2020-2038

- The Local Plan sets out Wiltshire Council's strategic vision for growth, providing land to meet objectively assessed development needs, providing for infrastructure, environmental improvements and necessary mitigating and adapting measures to tackle the impacts of climate change. The spatial vision for 2038 states that Wiltshire will have made significant strides towards carbon neutrality and the management of growth will be based on a sustainable pattern of development, focused primarily on Trowbridge, Chippenham and Salisbury.
- The plan seeks to guide future development to ensure that communities have a balance of jobs, services, facilities and homes. This Plan ensures that housing needs are met and identifies land for jobs and services to ensure that Wiltshire remains "strong and prosperous".

3. Local Analysis – Growth Zones

Local Analysis – Growth Zones

The Growth Zones in Swindon and Wiltshire have been identified as areas of significant economic activity, defined by collections of Lower Super Output Areas (LSOAs). These zones are characterised by their economic contributions, strategic transport links, and concentrations of employment, making them key drivers of growth within the region.

The three zones are analysed in detail in this section of the LEA and their spatial distribution is shown on the map to the right. The growth zones are:

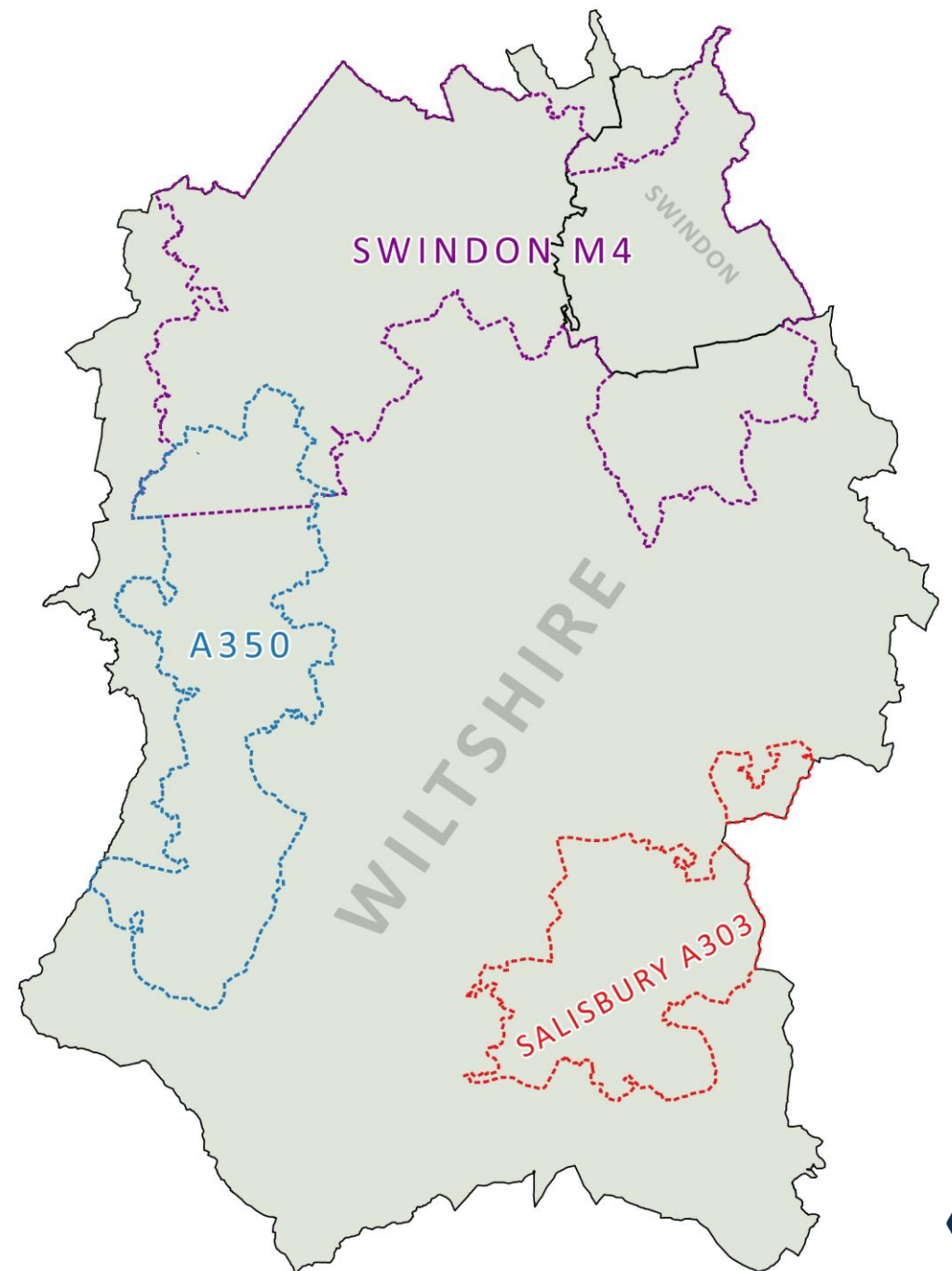
- **Swindon M4 Growth Zone**
- **A350 Growth Zone**
- **Salisbury A303 Growth Zone**

A small area of overlap exists between the A350 and Swindon M4 Growth Zones, particularly around Corsham and Chippenham, reflecting shared economic and infrastructure connections. This overlap is also an area of sizeable economic activity important to both zones.

The Growth Zones are underpinned by strong links to key transport corridors, such as the M4 and A303, which support access to wider markets and labour pools as well as potential markets for goods and services.

While the Growth Zones highlight areas with notable growth potential, the analysis in this section of the LEA also considers the importance of areas outside these zones. **The rest of Swindon and Wiltshire** contributes significantly to the region's economy, population, and employment.

Key metrics for each Growth Zone (and Non-Growth Zone) include population trends, employment by broad and priority sectors, economic output (GVA), and levels of deprivation by domain.



Local Analysis – Growth Zones – Swindon M4

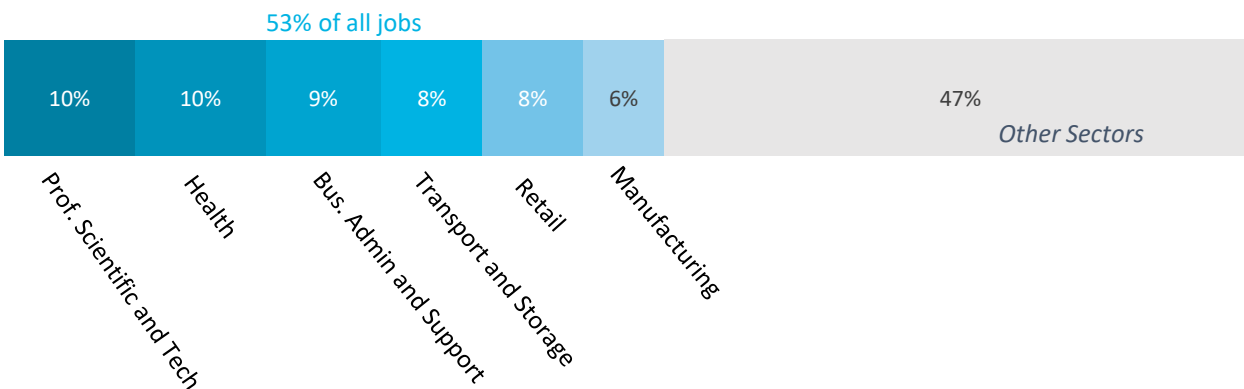
The Swindon M4 Growth Zone, home to over 306,000 residents, is the largest and most populated growth area in Swindon and Wiltshire. The M4 motorway, which links Bristol and London, provides strategically connects the growth zone to national markets and underpins the importance of the transport and storage sector in this area. Contributing £15 billion in economic output in 2022, its economy is driven by sectors such as professional, scientific, and technical services, healthcare, and business administration and support.

Overall the zone has seen a recovery from the impacts of the COVID-19 pandemic, with its economy in 2022 being 18% larger than in 2019. This has been led by strong growth in small areas where large business operations have played a major economic role – including Dyson near Malmesbury and Nationwide in Swindon town centre. There have been some economic challenges notably the loss of the Honda production factory in 2021 which in part explains the large contraction in Advanced manufacturing and engineering employment since 2019.

The population of this Growth Zone surpassed 306,000 in 2022 (latest data), according to ONS estimates. Since 2019, it has added nearly 2,200 residents—a +0.7% increase—equating to a Compound Annual Growth Rate (CAGR) of 0.2% over the last three years of data.

Despite its economic strengths, the area faces some challenges. 11% of its LSOAs rank among the top 20% most deprived in England, with particular issues in crime and education, skills, and training.

Broad Sectors of Employment, 2023

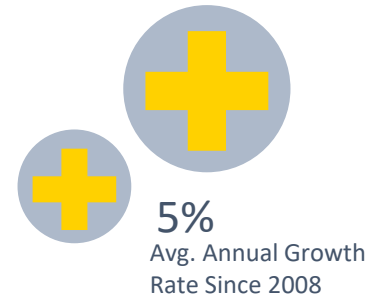


Source: Index of Multiple Deprivation, MHCLG, 2019; Mid-Year Population Estimates, ONS, 2022; Business Register and Employment Survey, ONS, 2023; UK small area gross value added (GVA) estimates, ONS, 2024

Priority Sector Employment Overview

Priority Sector	2023	% Zone's employment:	Change 2019-2023	Emp. LQ* 2023
Professional Business Services	28,690	18%	-6%	1.2
Creative Industries	5,330	3%	16%	0.7
Cyber Security	4,725	3%	14%	1
Advanced Manufacturing and Engineering	5,410	3%	-34%	1.5
Defence	4,915	3%	-7%	1.8
Environmental Technologies	1,800	1%	60%	2.3
Life Sciences incl. Natural Sciences	8,090	5%	69%	6.2

*LQ is a measure of sectoral concentration in an area relative to a benchmark (in this case, proportionate employment in a sector compared to proportionate employment in the same sector nationally) an LQ over 1 suggests greater employment concentration in the area than nationally and can therefore be interpreted as a potential local area of specialisation.



LSOAs in 20% most deprived by domain 2019

	Income	11% (21)
	Employment	13% (24)
	Education & Skills	18% (34)
	Health	13% (24)
	Crime	19% (36)
	Housing & Services	14% (26)
	Living Environment	6% (12)

% (number) of LSOAs in the Growth Zone that are in the bottom 20% of deprivation of each domain nationally

Areas experiencing deprivation in the top 10% nationally in this Growth Zone include: Central Swindon, Gorse Hill and Pinehurst, Liden Elden and Park South, Walcot and Park North, Penhil and Upper Stratton

Local Analysis – Growth Zones – A350

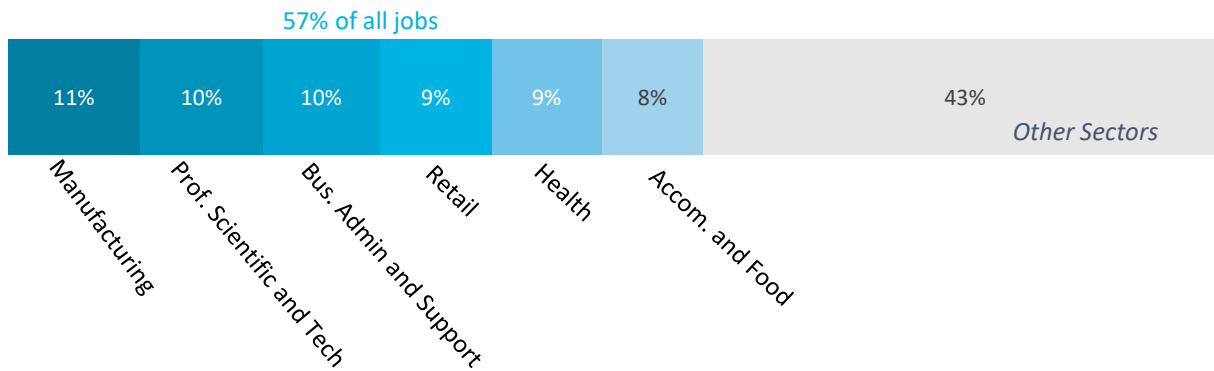
The A350 Growth Zone, with a population of just under 170,000, is a vital area for the Swindon and Wiltshire economy. Well-connected via the A350, a major arterial route, it contributed £2bn in economic output in 2022. Following the pandemic the local economy has experienced a recovery growing by 18% between 2019 and 2022.

The A350 Growth Zone has seen strong growth in all but one priority sector, professional and business services which contracted by 29% (-3,800 jobs) between 2019 and 2023. The majority of these jobs (3,000) seem to have been lost in one LSOA located around the Warminster high street.

Latest ONS data from 2022, estimates the A350 Growth Zone's population was just under 169,000. Since 2019, prior to the COVID-19 pandemic, the area has seen an increase of over 3,800 residents—a +2.3% rise. This represents an average annual growth rate of 0.8%, calculated as a Compound Annual Growth Rate (CAGR) for the period 2019 to 2022. The A350

The area does not face widespread deprivation, with only 6% of LSOAs in the top 20% most deprived areas in England. On average LSOAs in this zone have a IMD decile of 7. However, specific challenges exist, particularly in the domain of housing. 18% of LSOAs are among the top 20% most deprived nationally for barriers to housing and local services.

Broad Sectors of Employment, 2023

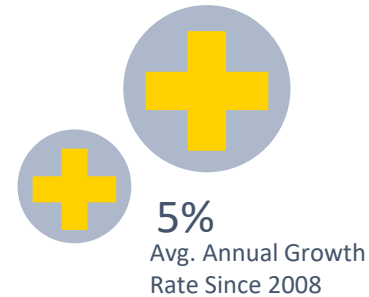


Source: Index of Multiple Deprivation, MHCLG, 2019; Mid-Year Population Estimates, ONS, 2022; Business Register and Employment Survey, ONS, 2023; UK small area gross value added (GVA) estimates, ONS, 2024








Priority Sector Employment Overview

Priority Sector	2023	% Zone's employment	Change 2019-2023	Emp. LQ* 2023
Professional Business Services	9,705	12%	-29%	0.8
Creative Industries	2,770	3%	22%	0.7
Cyber Security	2,405	3%	28%	1
Advanced Manufacturing and Engineering	3,070	4%	4%	1.6
Defence	3,970	5%	11%	2.9
Environmental Technologies	250	0%	19%	0.6
Life Sciences incl. Natural Sciences	430	1%	-12%	0.7

*LQ is a measure of sectoral concentration in an area relative to a benchmark (in this case, proportionate employment in a sector compared to proportionate employment in the same sector nationally) an LQ over 1 suggests greater employment concentration in the area than nationally and can therefore be interpreted as a potential local area of specialisation.



LSOAs in 20% most deprived by domain 2019

	Income	6% (4)
	Employment	7% (5)
	Education & Skills	14% (10)
	Health	1% (1)
	Crime	6% (4)
	Housing & Services	18% (13)
	Living Environment	4% (3)

% (number) of LSOAs in the Growth Zone that are in the bottom 20% of deprivation of each domain nationally

Areas experiencing deprivation in the top 10% nationally in this Growth Zone include: Melksham Forrest, Melksham South, Trowbridge Lambrook, Trowbridge Park

Local Analysis – Growth Zones – Salisbury A303

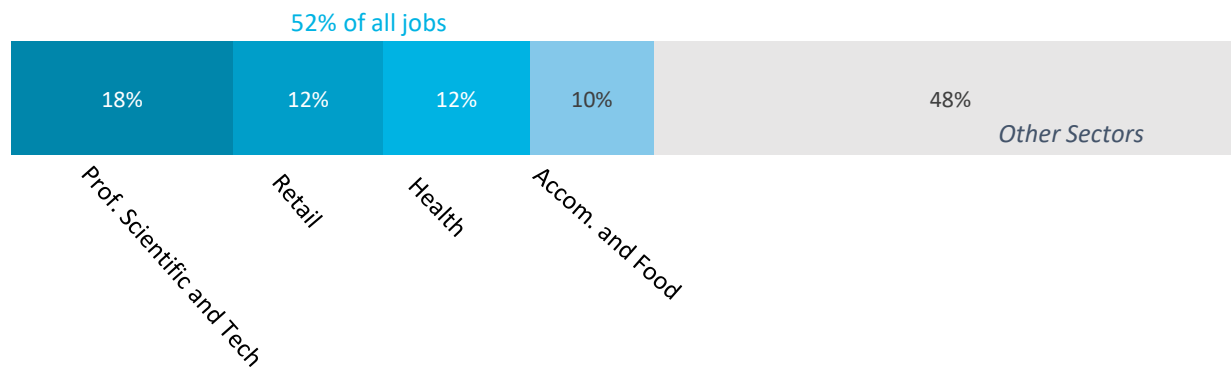
The Salisbury A303 Growth Zone is the smallest of the Growth Zones by population, with just under 90,000 residents. Despite its size, it contributed nearly £3 billion to the economy in 2022 and grew by 16% since 2019 showing a recovery following the pandemic. Its economy is focused on key sectors such as professional, scientific and technical services, retail, healthcare, and accommodation and food services.

Located in southeast Wiltshire, the Salisbury A303 Growth Zone encompasses Wilton, Amesbury, Tidworth, Ludgershall, and the cathedral city of Salisbury. Its connectivity is supported by the A303, a key route that links the region to wider transport networks.

By 2022, the population had reached just under 90,000, reflecting a +2.2% increase since 2019—equating to an average annual Compound Annual Growth Rate (CAGR) of 0.7% over the last three years of data.

While the area does not face widespread deprivation, specific challenges remain. Only 6% of LSOAs are among the top 20% most deprived nationally, yet education, skills, and training deprivation is a concern, with 20% of LSOAs falling in the top 20% most deprived nationally in this domain.

Broad Sectors of Employment, 2023

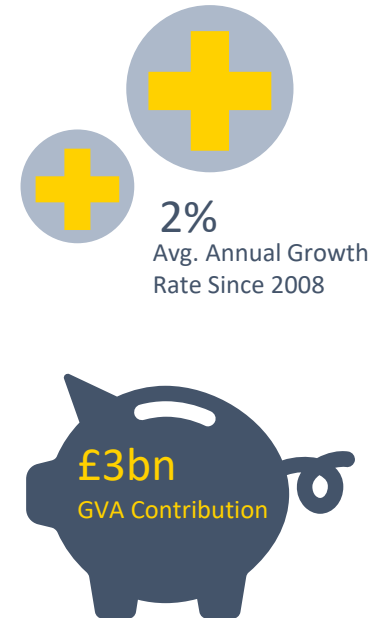


Source: Index of Multiple Deprivation, MHCLG, 2019; Mid-Year Population Estimates, ONS, 2022; Business Register and Employment Survey, ONS, 2023; UK small area gross value added (GVA) estimates, ONS, 2024

Priority Sector Employment Overview

Priority Sector	2023	% Zone's employment	Change 2019-2023	Emp. LQ* 2023
Professional Business Services	10,250	23%	21%	1.5
Creative Industries	1,030	2%	18%	0.5
Cyber Security	670	2%	-5%	0.5
Advanced Manufacturing and Engineering	1,235	3%	-24%	1.2
Defence	1,325	3%	4%	1.8
Environmental Technologies	335	1%	109%	1.5
Life Sciences incl. Natural Sciences	5,780	13%	54%	15.9

*LQ is a measure of sectoral concentration in an area relative to a benchmark (in this case, proportionate employment in a sector compared to proportionate employment in the same sector nationally) an LQ over 1 suggests greater employment concentration in the area than nationally and can therefore be interpreted as a potential local area of specialisation.



LSOAs in 20% most deprived by domain 2019

	Income	4% (2)
	Employment	4% (2)
	Education & Skills	20% (11)
	Health	2% (1)
	Crime	4% (2)
	Housing & Services	15% (8)
	Living Environment	7% (7)

% (number) of LSOAs in the Growth Zone that are in the bottom 20% of deprivation of each domain nationally

Areas experiencing deprivation in the top 10% nationally in this Growth Zone include: Salisbury Bermeton Heath, Salisbury Fisherton & Bermeton Village, Salisbury Harnham East, Salisbury Milford

Local Analysis – Rest of Swindon and Wiltshire

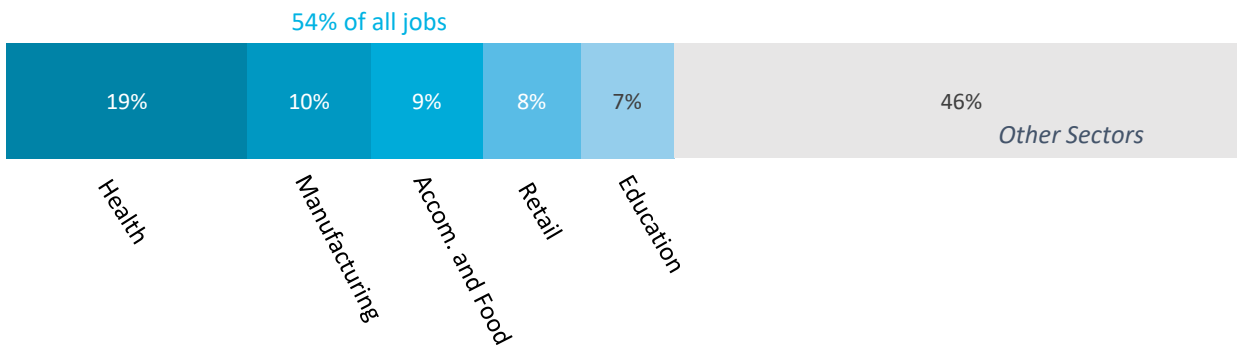
The rest of Swindon and Wiltshire, comprising predominantly rural locations alongside towns such as Mere, Devizes, and Calne, are home to 187,000 people and contributed just over £4 billion in economic output in 2023. These areas have seen slower population growth compared to the Growth Zones, and foundational sectors such as healthcare, education, and retail play a key role in the local economy

The area experienced population growth of 0.9% between 2019 and 2022, adding nearly 1,700 residents to reach just under 187,000 in 2022. This equates to a Compound Annual Growth Rate (CAGR) of 0.3% between 2019 and 2022, a slower pace compared to other parts of Swindon and Wiltshire.

Economically, the area's contribution of just over £4 billion in GVA reflects its reliance on foundational sectors, particularly healthcare, education, and retail, which provide essential services to both rural and urban populations. The geography encompasses a mixture of open countryside and towns, with some overlap into the Swindon local authority area, adding diversity to its economic base.

Although the area does not feature widespread deprivation, barriers to housing and services present significant challenges, with 44% of LSOAs in the area ranked among the top 20% most deprived nationally for this domain. Similarly, 25% of LSOAs rank poorly for the living environment, pointing to ongoing issues with housing quality and infrastructure.

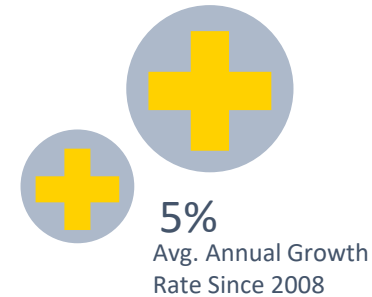
Broad Sectors of Employment, 2023



Priority Sector Employment Overview

Priority Sector	2023	% Zone's employment	Change 2019-2023	Emp. LQ* 2023
Professional Business Services	6,270	9%	-25%	0.6
Creative Industries	3,115	5%	10%	0.9
Cyber Security	1,665	2%	-10%	0.8
Advanced Manufacturing and Engineering	1,285	2%	-13%	0.8
Defence	1,315	2%	-22%	1.1
Environmental Technologies	805	1%	71%	2.4
Life Sciences incl. Natural Sciences	70	0%	-97%	0

*LQ is a measure of sectoral concentration in an area relative to a benchmark (in this case, proportionate employment in a sector compared to proportionate employment in the same sector nationally) an LQ over 1 suggests greater employment concentration in the area than nationally and can therefore be interpreted as a potential local area of specialisation.



LSOAs in 20% most deprived by domain 2019

	Income	1% (1)
	Employment	3% (3)
	Education & Skills	5% (5)
	Health	0% (0)
	Crime	0% (0)
	Housing & Services	44% (44)
	Living Environment	25% (25)

% (number) of LSOAs in the Growth Zone that are in the bottom 20% of deprivation of each domain nationally

Areas experiencing deprivation in the top 20% nationally in this Growth Zone include: Devizes North, Devizes South

Source: Index of Multiple Deprivation, MHCLG, 2019; Mid-Year Population Estimates, ONS, 2022; Business Register and Employment Survey, ONS, 2023; UK small area gross value added (GVA) estimates, ONS, 2024

4. Economy

Economy – Summary Findings



Economic growth – By 2022 Swindon and Wiltshire experienced a growth rate of **3%** since 2019, in line with the national average (2%). However, this growth is led by Wiltshire where a 5% growth rate was experienced, Swindon's economy remains smaller in 2022 than in 2019 by 1%.



Employment – Swindon and Wiltshire lost 2,000 jobs (**-1%**) between 2018 and 2023, while employment nationwide grew by 5%. Wiltshire has seen a gradual but steady recovery from the pandemic, while Swindon's employment base has continued to shrink. This, along with low job density and a shrinking business base, suggests worsening employment prospects in Swindon compared to other regions.



Productivity disparities – Wiltshire's productivity has grown rapidly since 2019 but remains **14%** below the national average. In contrast, Swindon continues to lead the region, **ranking 12th** in labour productivity among all the local authorities in England.



Trade recovery – Between 2019 and 2022, the value of both imports and exports in Swindon and Wiltshire grew by around **14%**. This recovery has been particularly strong with non-EU countries, highlighting the area's ability to adapt in a post-Brexit, post-pandemic landscape.



Business ecosystem – Swindon and Wiltshire's business base has declined over the past five years, with a net **loss of 1,370 businesses** between 2019 and 2024. Low business survival rates in Swindon, coupled with falling business birth rates, likely explain why the area lags behind England on business base growth across nearly all sectors.



Travel to work patterns – A **higher number of people leave the area for work** than people commute into, potentially due to better employment and salary opportunities. More Wiltshire residents work in Swindon than the other way around, likely due to Swindon's urban economy offering higher-paid jobs, while Wiltshire's lower deprivation levels and rural lifestyle make it an attractive place to live for while commuting somewhere else.

Economy - Output

Swindon and Wiltshire generated nearly £26bn in 2022, contributing substantially to the South West's economy but growing slowly

Swindon and Wiltshire's output contributed 15% to the South West region and 1% to England's total output. The proportion of Gross Value Added (GVA) generated by each local authority in the area is:

- Swindon: £11.5bn (44% of the total)
- Wiltshire: £14.4bn (56% of the total)

Across comparator local authorities, Wiltshire and Swindon ranked fourth and seventh, respectively, maintaining the same positions as in 2019.

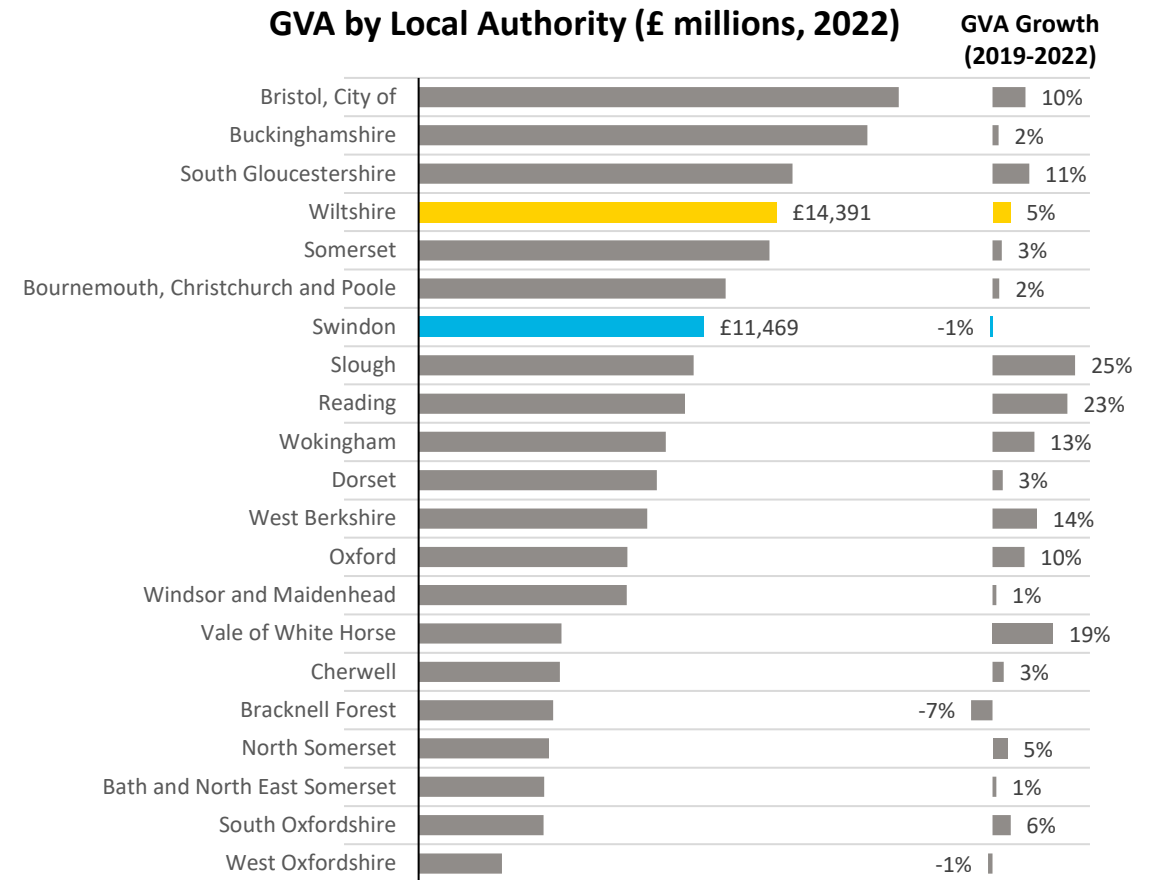
In real terms (2019 money value), Swindon and Wiltshire's GVA has grown by 3% since 2019. While this growth has been below the regional average (5%), it aligns with the national average (2%). In comparison to the other local authorities, Wiltshire ranked tenth, while Swindon ranked nineteen, just ahead of West Oxfordshire and Bracknell Forest.

The economic restrictions brought by COVID-19 significantly impacted the area's economy, contracting by 10% between 2019 and 2020. Since then, Wiltshire's recovery has been strong, mirroring rapid regional growth and surpassing pre-pandemic levels in 2022 by 5%.

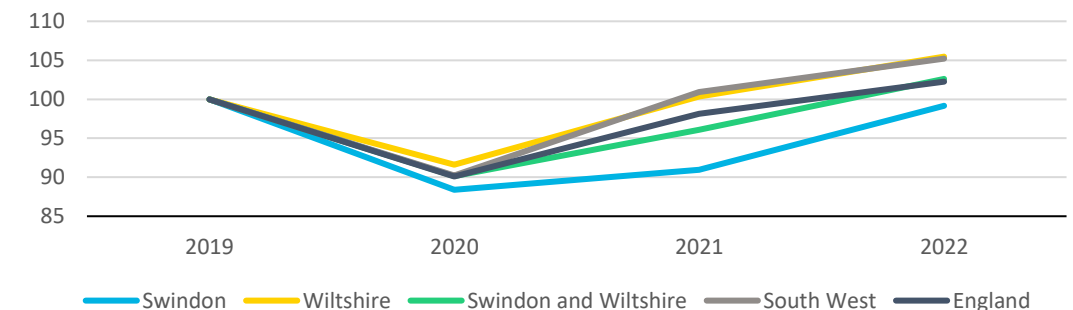
Swindon's recovery has lagged, with GVA still 1% below 2019 levels. The closure of Honda's plant in 2021 has been a key factor in this contraction, affecting not just the manufacturing sector where it operated, but potentially the wider economy through disruptions to local supply chains and reduced employee wage spending.

However, in 2022, Swindon experienced significant growth (+9% compared to 2021 levels), surpassing both the regional and national annual growth (+4% both). This suggests a potential economic rebound, driven by key sectors such as financial and insurance services, as well as agriculture and utilities.

Source: ONS Regional Accounts, 2019-2022



Indexed GVA Growth (2019=100, 2019 money value)



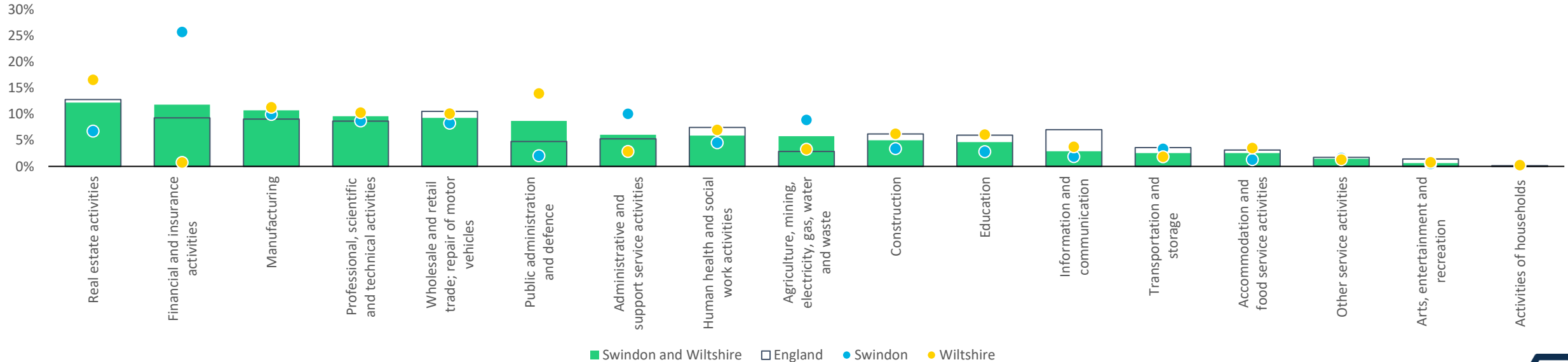
Economy – GVA by Sector

Swindon and Wiltshire's economy relies heavily on real estate, finance and insurance, manufacturing, professional, scientific and technical, and wholesale and retail, contributing over half of GVA

The top five sectors by GVA output in Swindon and Wiltshire are real estate (£3.2bn, 12% of total GVA); financial and insurance (£3.1bn, 12%); manufacturing (£2.8bn, 11%); professional, scientific and technical (£2.5bn, 10%); and wholesale and retail (£2.4bn, 9%). Collectively, these sectors account for over half (54%) of total economic output in the area, compared to 50% in England. Both Swindon and Wiltshire maintain a strong manufacturing presence (10% and 11%, respectively, compared to 9% in England), while the information and communication contributes 7% nationally but only 2% in Swindon and 4% in Wiltshire.

There are notable differences within the area. Swindon has a particularly high reliance on financial and insurance services (26%), far exceeding both Wiltshire and the national average. Swindon also has significant contributions from administrative and support services (10%) and agriculture, mining and utilities (9%). Meanwhile, Wiltshire places greater emphasis on public administration and defence (14%), a sector that does not feature among the top industries in either Swindon or England. Based on available GVA data for a group of subsectors, the largest subsector (exc. real estate) in Wiltshire 'other professional, scientific and technical activities' generates £1.1bn of GVA (8%), which includes scientific research and development associated with Porton. In comparison, the largest subsector is 'manufacture of metals, electrical products, and machinery', which generates £625m of GVA (5%).

GVA by Sector, 2022



Source: ONS Regional Accounts, 2019-2022

Economy – GVA Growth by Sector

High-value industries such as financial services and professional sectors have surged in Swindon and Wiltshire

High-value sectors such as financial and insurance services, and professional, scientific and technical services have grown considerably over the past three years, currently contributing a higher proportion of GVA compared to the national average. GVA growth in these sectors has been stronger in Swindon in absolute terms (+£2.4bn and +£0.9bn, respectively) compared to Wiltshire (+£18m and +£255m). The information and communication sector has also seen notable expansion but only in Wiltshire (+38%, +£160m).

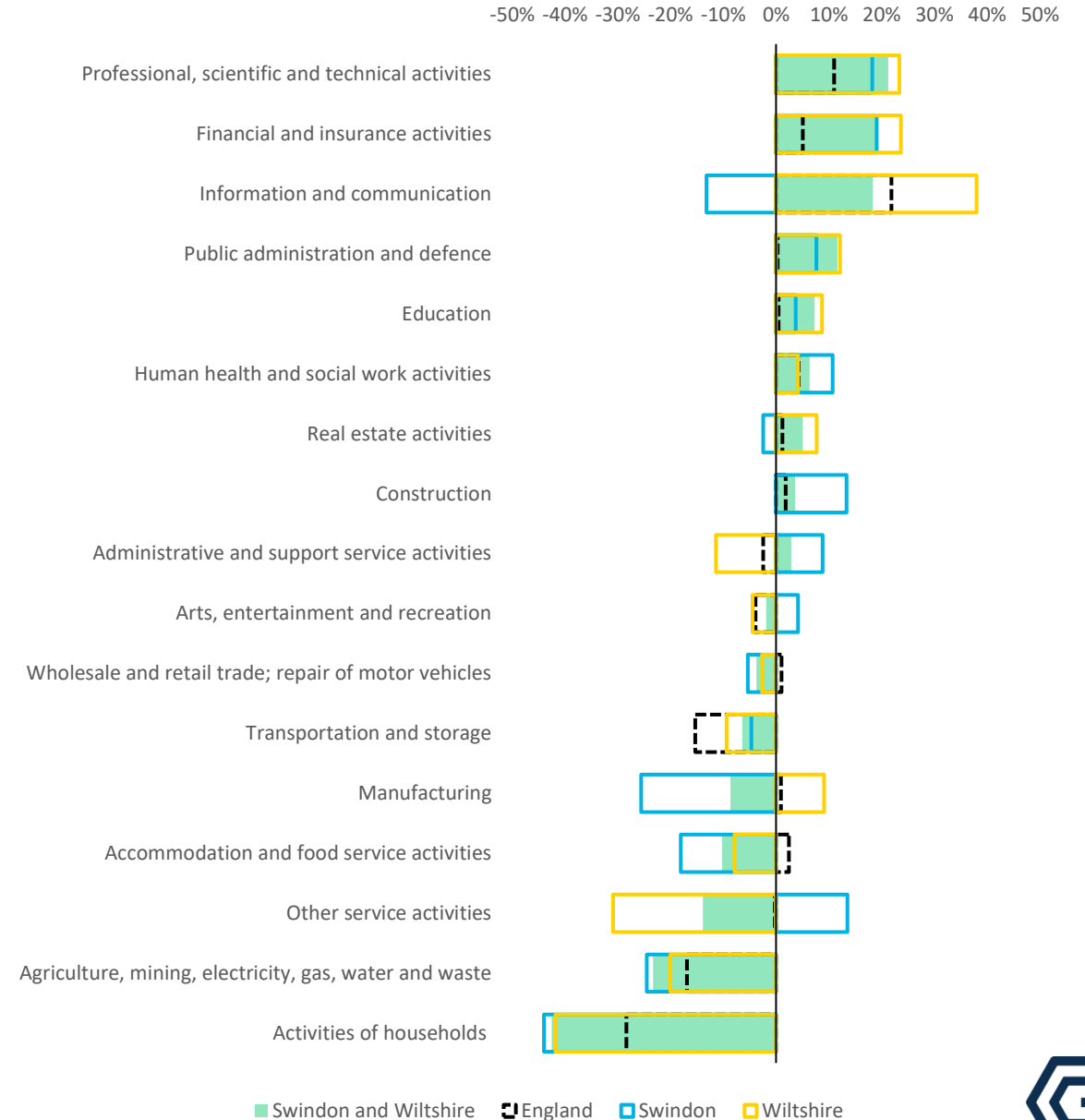
Manufacturing's absolute contribution to Swindon's economy has declined in recent years, diverging from the national trend, which saw a modest increase of +1%. In Swindon, manufacturing shrank by 26% (-£371m), with a 37% drop (£-349m) in the sub-sector of manufacturing of metals, electrical products and machinery, which includes motor vehicles. This decline can therefore be partially attributed to the closure of Swindon's Honda site in 2021 and the subsequent job losses.

The GVA from the agriculture, mining and utilities sector—a key driver of Swindon's economic output—also experienced a significant decline between 2019 and 2022, aligning with national trends (-17%) but with a sharper contraction in Swindon (-£299m, -25%) compared to Wiltshire (-£88m, -20%). Given Swindon's urban economy, this trend is unlikely to be driven by agriculture. Instead, it may be influenced by other factors, such as changes in the energy and utilities market, investment in quarrying, or the performance of npower's Headquarters in Swindon. Remarkably, in 2022, the sector in Swindon saw a strong recovery, with a 55% annual growth (+£327m), compared to -4% in England, indicating a notable rebound. Continued monitoring will be crucial to assess whether this positive momentum can be sustained in the years ahead.

As farming plays a larger role in Wiltshire, the sharp drop in GVA between 2019 and 2021 can be attributed to the immediate impact of the pandemic on global supply chains, labour shortages, and reduced demand for certain agricultural products. Unlike Swindon, GVA in the sector in Wiltshire continued to decline in 2022, with a further decrease of -£66m (-16%).

Source: ONS Regional Accounts, 2019-2022

Swindon and Wiltshire GVA by Sector, 2019-2022



Economy - Output Local Insights

Economic output is located around key producers and organisations such as Dyson in Wiltshire and Nationwide in Swindon...

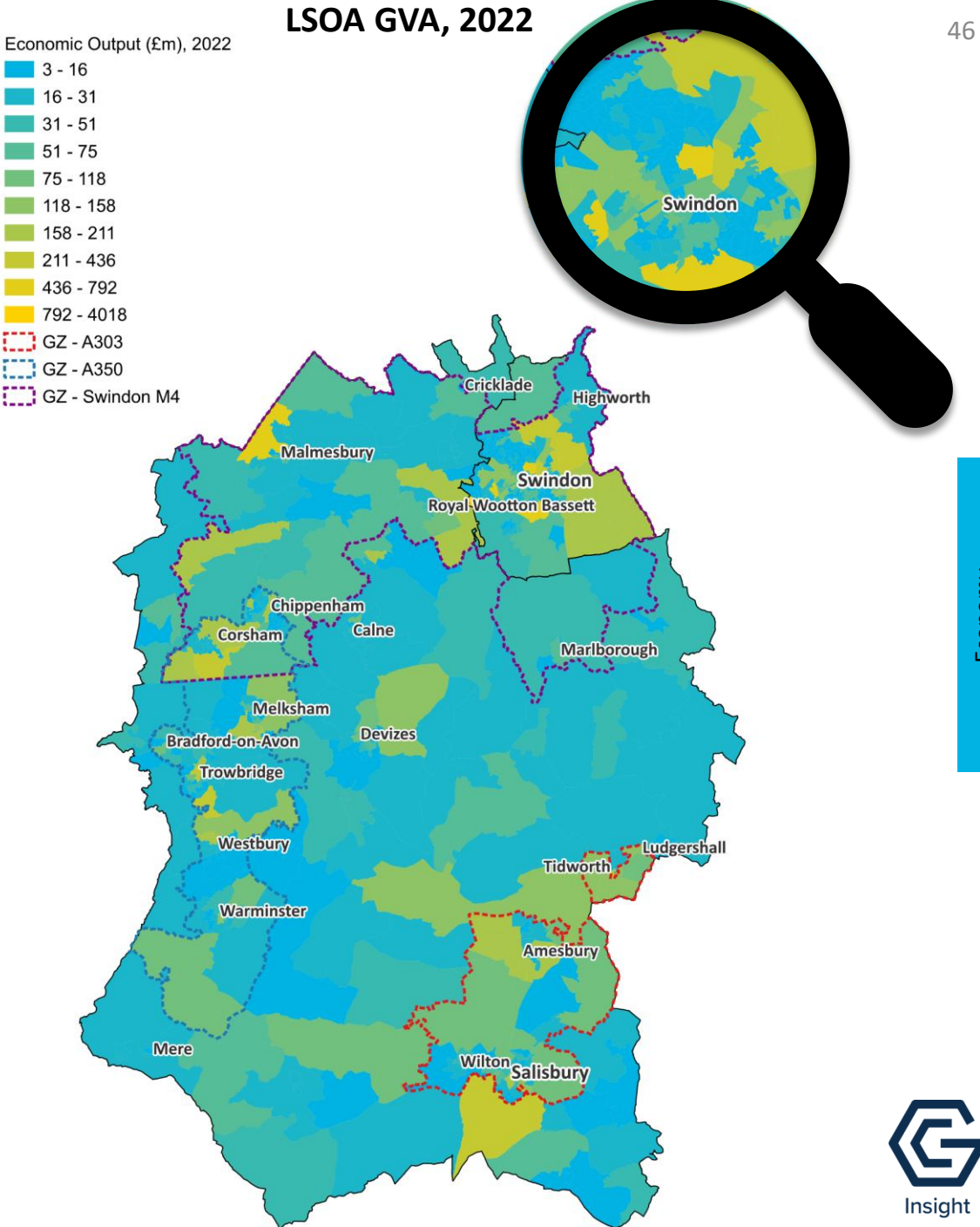
Lower level GVA estimates are now available from the ONS. It should be noted that, analysis of economic output at small areas, in this case LSOAs has challenges. For example, at this level it becomes harder to account for leakage. Despite this it is still worth considering this data to understand the distinct and local hotspots of economic output activity across Swindon and Wiltshire, not necessarily the numerical output value of each LSOA.

For this reason, spatial analysis gives a useful representation of where the main drivers for growth are in Swindon and Wiltshire. Most LSOAs experiencing high growth fall within the three growth zones, with some exception, notably the area just to the south of Salisbury in Wiltshire.

Areas with the highest economic output tend to be located on the outskirts of Swindon in areas such as Broome Manor and Croft where the large professional and financial service organisation Nationwide Building Society has a large presence. Another example being to the west of Swindon town centre around the Windmill Hill Business Park.

While GVA hotspots are sparser in Wiltshire – due to the rural nature of the local authority – hotspots of local activity can still be seen. One of Wiltshire’s most significant economic output generators lies in the north west of the local authority near Malmsbury, home Dyson and the Dyson Institute Village. Other notable economic activity include the defence and life sciences clusters around Salisbury and Amesbury, particularly near Boscombe Down and Porton Down, where research, innovation, and defence contribute to output.

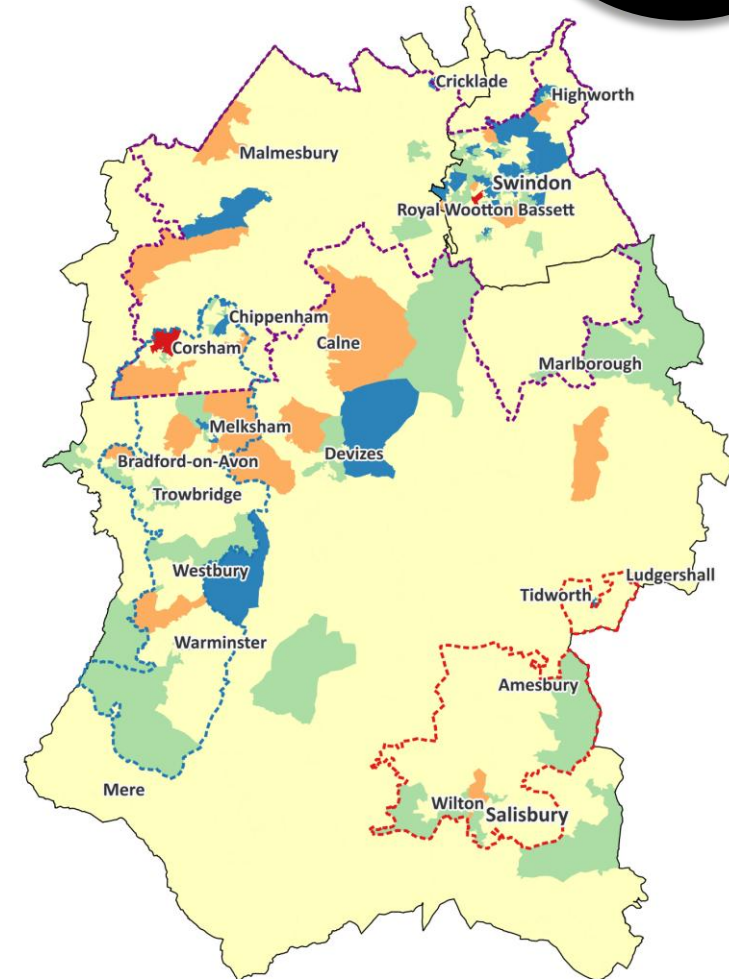
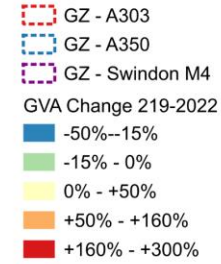
Source: UK small area gross value added (GVA) estimates, ONS, 2024



Economy - Output Local Insights

By 2022 Swindon and Wiltshire experienced a growth rate of 3% since 2019. This rate of growth is typically the case across most LSOA areas.

Some areas in both Swindon and Wiltshire have seen more significant growth. For example, in the area between Westlea and Kingshill to the south of Swindon there has been a +300% increase in GVA since 2019. Further analysis suggests this is likely down to establishment of an Iceland distribution centre in the area in 2021. In Wiltshire growth hotspots tended to be within the Swindon M4 Growth Zone, one example being around the Castle Combe solar farm, which was commissioned in 2015 and includes a motorsport circuit.



Source: UK small area gross value added (GVA) estimates, ONS, 2024

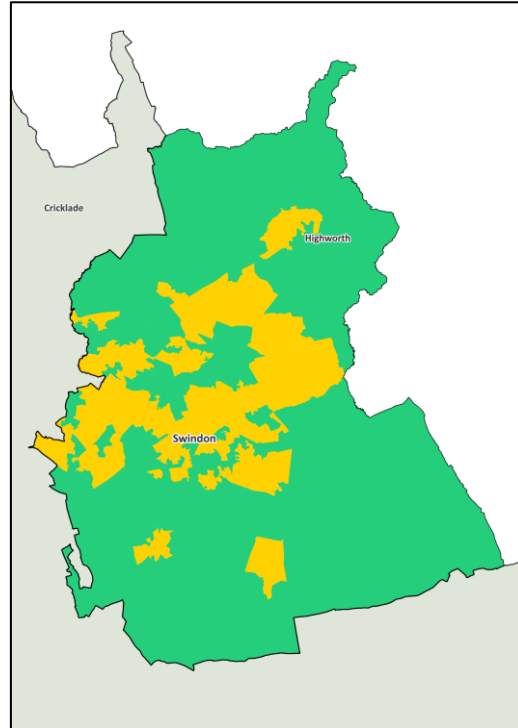
Economy - Output Local Insights

Significant proportions of both Swindon and Wiltshire have still not recovered from the economic impact of the COVID-19 pandemic

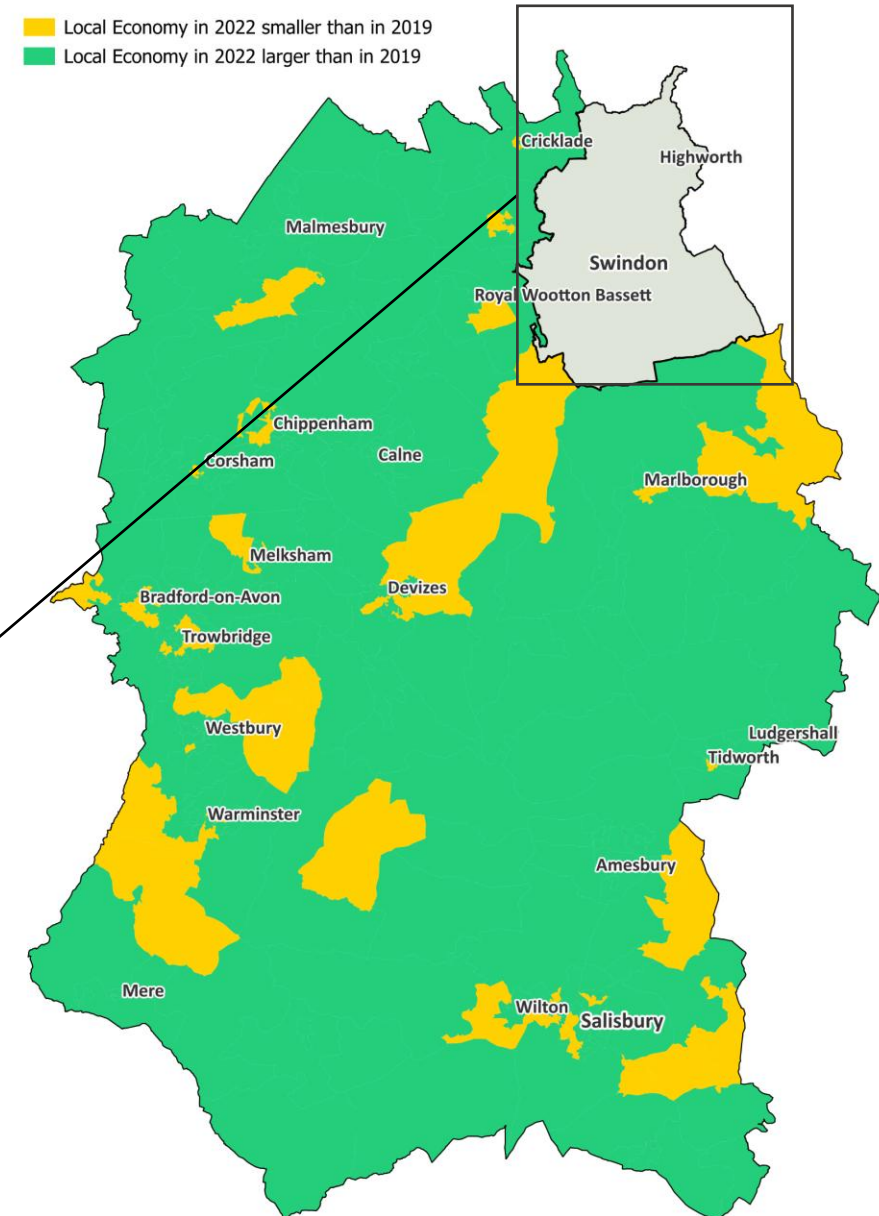
As stated previously, Swindon's economy remained 1% smaller in 2022 than it did prior to the COVID-19 pandemic (2019). This is due to several areas in Swindon remaining producing less output in 2022 than in 2019. With the exception of 4 high growth areas and several average growth areas, many Swindon LSOAs around the town centre have lower output levels in the latest data (2022) than in 2019.

However, given the lag in this data, with this report published in 2025, it is possible that these areas eventually experienced a recovery from the pandemic.

Swindon LSOA Output 2019 & 2022



Wiltshire LSOA Output 2019 & 2022



Source: UK small area gross value added (GVA) estimates, ONS, 2024

Economy - Productivity

Swindon and Wiltshire have closed the productivity gap with England, but local disparities persist

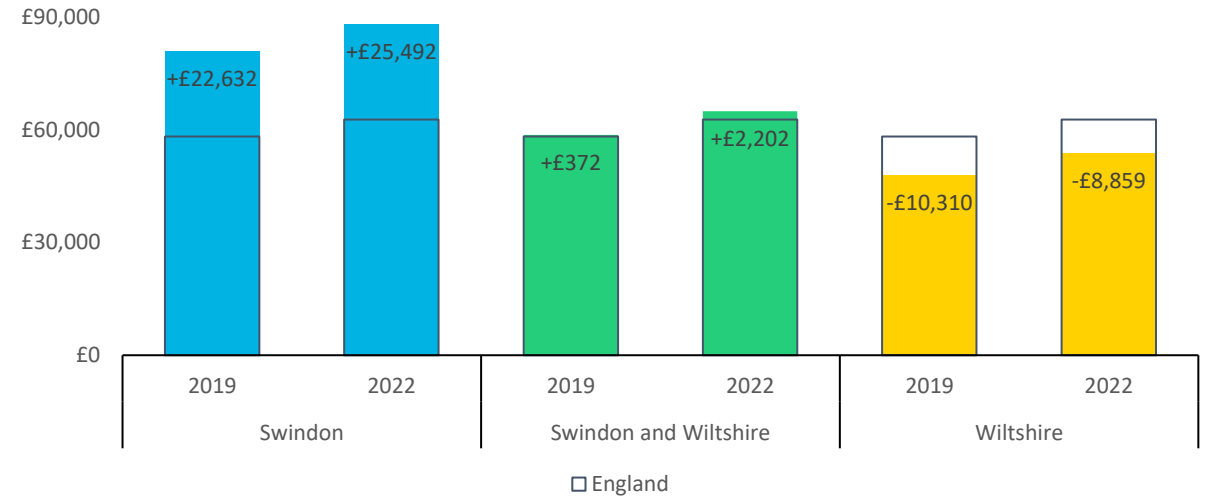
Whilst output is a valuable indicator of economic activity, productivity—the amount of output produced from a given level of inputs—is a more crucial measure of economic performance and a key driver of prosperity. It directly influences both wages and profits, the latter being essential for businesses to sustain employment and finance re-investment.

Labour productivity in Swindon and Wiltshire has increased in recent years, rising from £58,650 per job filled in 2019 to £64,950 in 2022 (+11%). This growth outpaced both England's average productivity level (£62,750) and the national productivity growth rate (+8%).

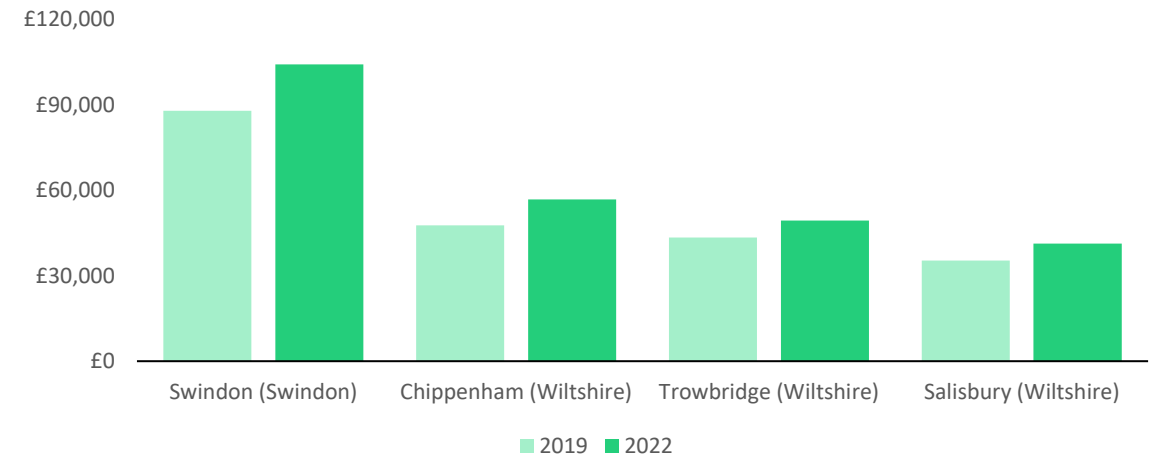
Swindon is a major driver of productivity in the area (£88,240), ranking 12th among the 296 local authorities in England. While productivity in Wiltshire has grown by 12% between 2019 and 2022, it remains 14% (£8,860) below the national average. This suggests that despite progress, further improvements are needed to reach national benchmarks and fully capitalise on Wiltshire's post-pandemic economic recovery.

An analysis of productivity by towns and cities reaffirms Swindon town's role as the primary contributor to high productivity levels in Swindon and Wiltshire. As Chippenham, Salisbury and Trowbridge are key settlements within Swindon and Wiltshire's growth zones, increasing productivity in these areas will be essential to boosting economic performance across Wiltshire and the wider area.

Output per Job Filled



Output per Job Filled by Town



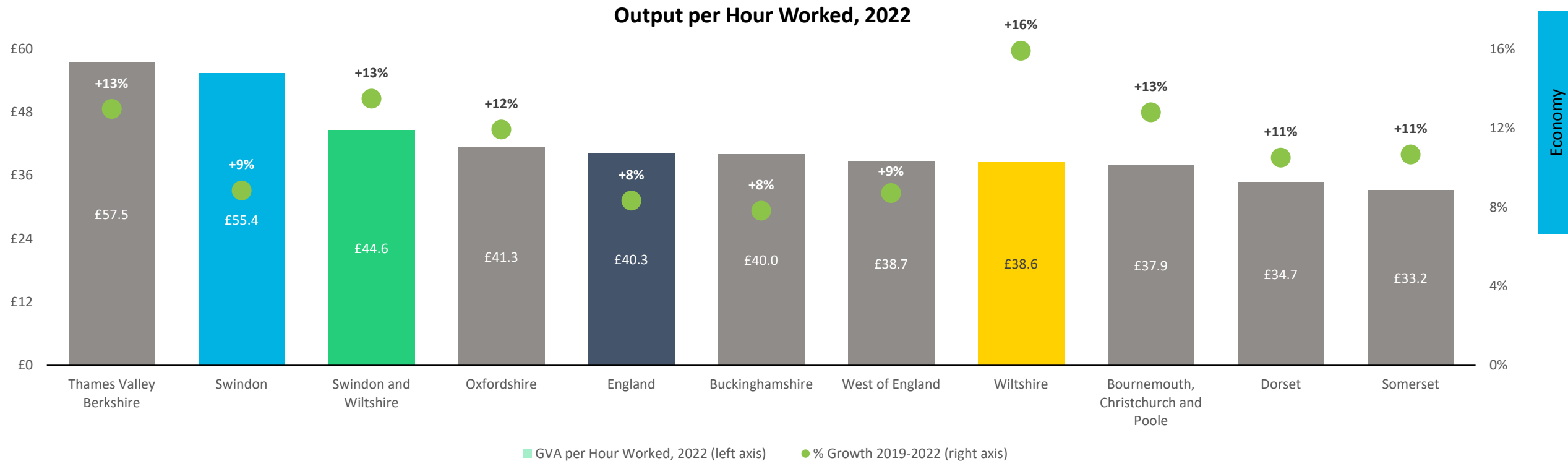
Source: ONS Labour Productivity, 2019-2022

Economy - Productivity

Wiltshire's productivity has grown rapidly but remains below the national average, while Swindon continues to lead the region

Swindon exhibits significantly higher output per hour (£55) than England (£40) and other comparator areas. While Wiltshire recorded the highest growth in GVA per hour worked (+16%) among benchmark areas, its productivity remains below the national average.

The productivity gap between Swindon and Wiltshire can largely be attributed to Swindon's higher concentration of employment in high-value sectors (21% vs. 16% in Wiltshire). In contrast, Wiltshire's rural and more dispersed economy, with a larger share of employment in lower-productivity sectors such as agriculture and tourism, poses challenges to reaching comparable productivity levels.



Source: ONS Labour Productivity, 2019-2022

Economy - Sectoral Productivity

Swindon and Wiltshire benefits from some very productive industries, but productivity gaps highlights areas for growth

Economic output data by employment highlights the sectors where Swindon and Wiltshire demonstrate strong productivity.

Key strengths in Swindon and Wiltshire include financial and insurance, public administration and defence, and agriculture, mining, and utilities. In contrast, arts and entertainment, accommodation and food, and transport and storage are among the least productive sectors and show significant gaps compared to England.

Despite its relative strength, the information and communication sector in Swindon and Wiltshire lags well below the national average (-£20,780). This highlights the need for strategic investment to boost productivity in this sector, ensuring businesses remain competitive in an increasingly digital economy.

When comparing the two areas, Swindon outperforms Wiltshire in productivity across most sectors (10 out of 15), with the largest gaps in agriculture, mining and utilities, financial and insurance, and manufacturing. Beyond having a smaller workforce in high-value sectors, Wiltshire also struggles with lower productivity within these industries, indicating structural challenges that may constrain its economic growth.

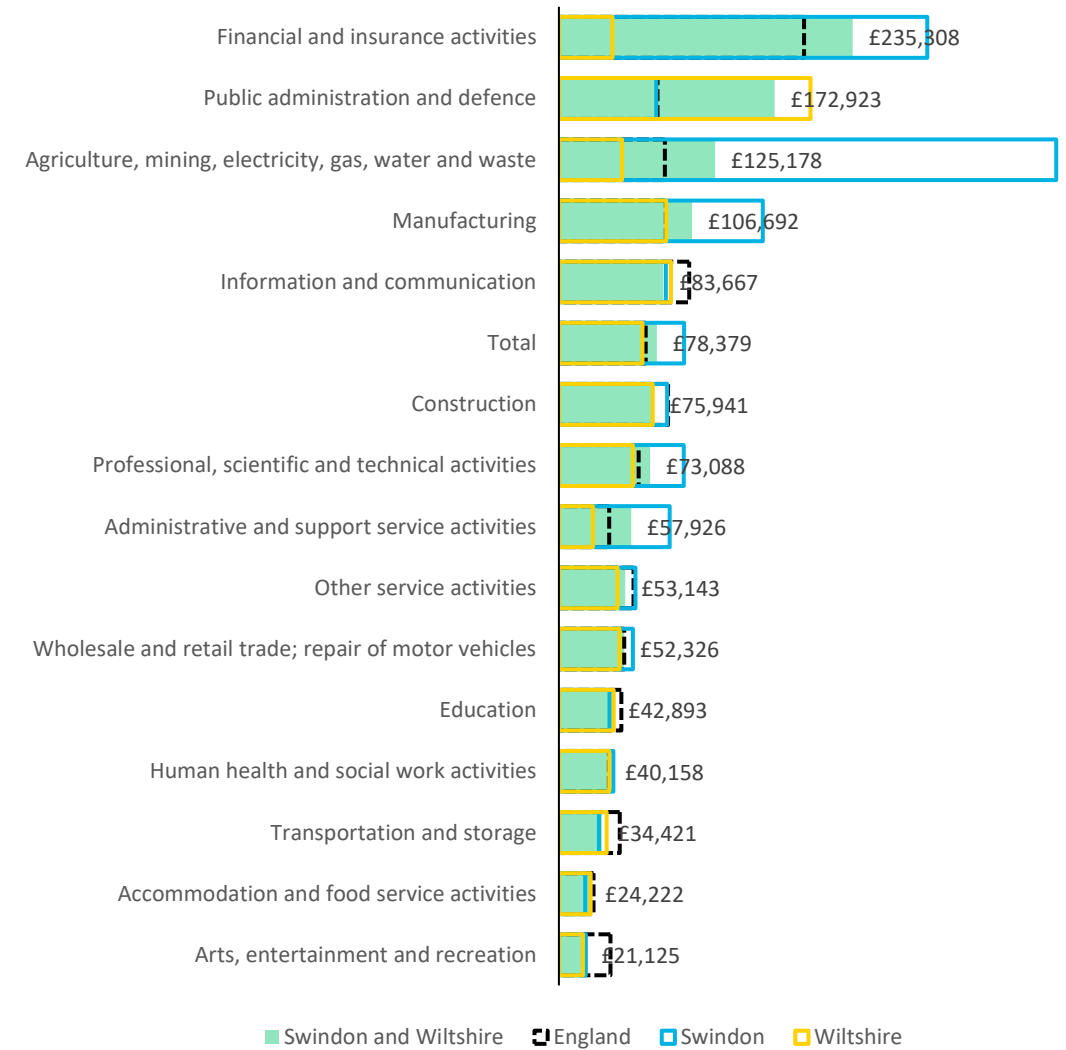
Wiltshire stands out in public administration and defence, where it generates more than twice the GVA per worker compared to both Swindon and England. This sectoral strength plays a crucial role in the local economy, offering a potential foundation for broader productivity improvements.

In contrast, Swindon stands out in agriculture, mining and utilities. This sector has relatively low employment (2,560 jobs in 2022, 2% of total employment) but generates a significant share of GVA (9% vs. 3% in England), suggesting a capital-intensive industry.

** The real estate sector has been excluded from this chart as its exceptionally high productivity figures are largely driven by imputed rental income rather than actual economic output per worker, which can distort comparisons across industries. Source: ONS Regional Accounts, 2022; Business Register and Employment Survey, ONS, 2022*

GVA per Employment by Sector*, 2022

(values shown are for Swindon and Wiltshire)



Economy – Business Base

There are currently 28,555 enterprises operating in Swindon and Wiltshire

This accounts for 13% of the business base in the South West, with approximately 7,035 businesses in Swindon (25%) and 21,520 in Wiltshire (75%).

The sectoral composition of business in Swindon and Wiltshire closely resembles that of England, except in the agriculture sector, where business make up 7% of the total, nearly double the national position (4%). Within Swindon and Wiltshire, Swindon has a higher concentration of businesses in transport and storage, construction, and information and communication; while Wiltshire has a greater share in agriculture and professional, scientific and technical services. Neither manufacturing nor information and communication have a high representation in Swindon's employment, but they are strongly represented in its business base compared to the national average. This is likely due to the high proportion of micro and small businesses on these sectors (95% and 99%, respectively).

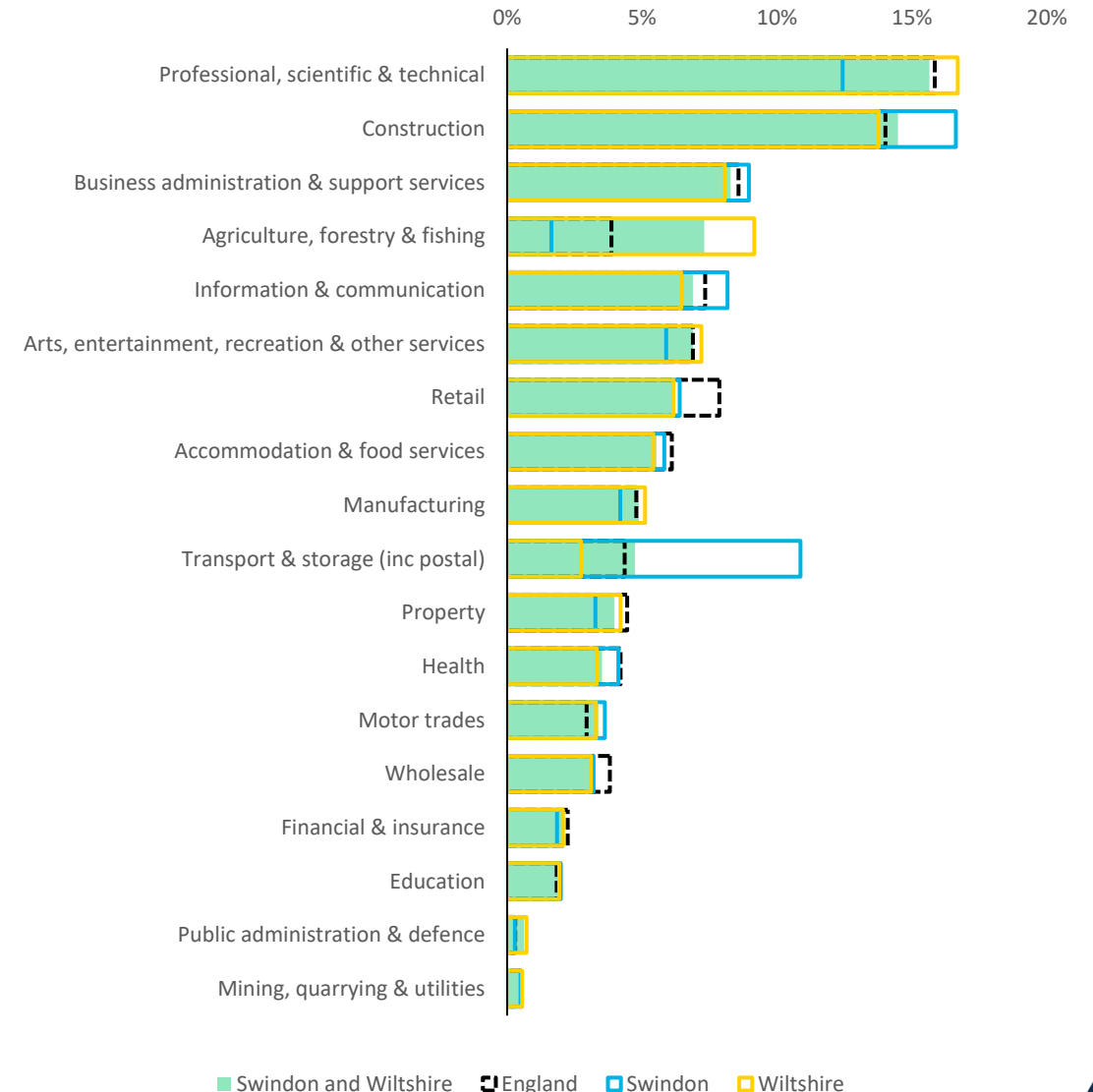
There are 25 businesses in Swindon and Wiltshire that each employ over 1,000 people. The vast majority of businesses in the area are SMEs (99.6%), in line with regional and national averages. Additionally, 79% of businesses in Swindon and Wiltshire employ fewer than five people, slightly above the regional average (77%).

Business Base by Size, 2024



Source: ONS UK Business Counts, 2024

Business Base by Broad Sector, 2024



Economy – Business Base Change

Swindon and Wiltshire's business base has been in decline over the last five years

Between 2019 and 2024, the number of enterprises in Swindon and Wiltshire declined by 5%, representing a loss of 1,370 businesses. This decline was observed in both Swindon (-6%) and Wiltshire (-4%), which contrasts with the regional and national trends, where business numbers have experienced slight growth.

Between 2019 and 2022, the business count in Swindon and Wiltshire shrank by 2%, while businesses in England and the South West grew by 2%. This suggests that businesses in Swindon and Wiltshire may have been less resilient to the economic shocks from COVID-19 compared to regional and national averages.

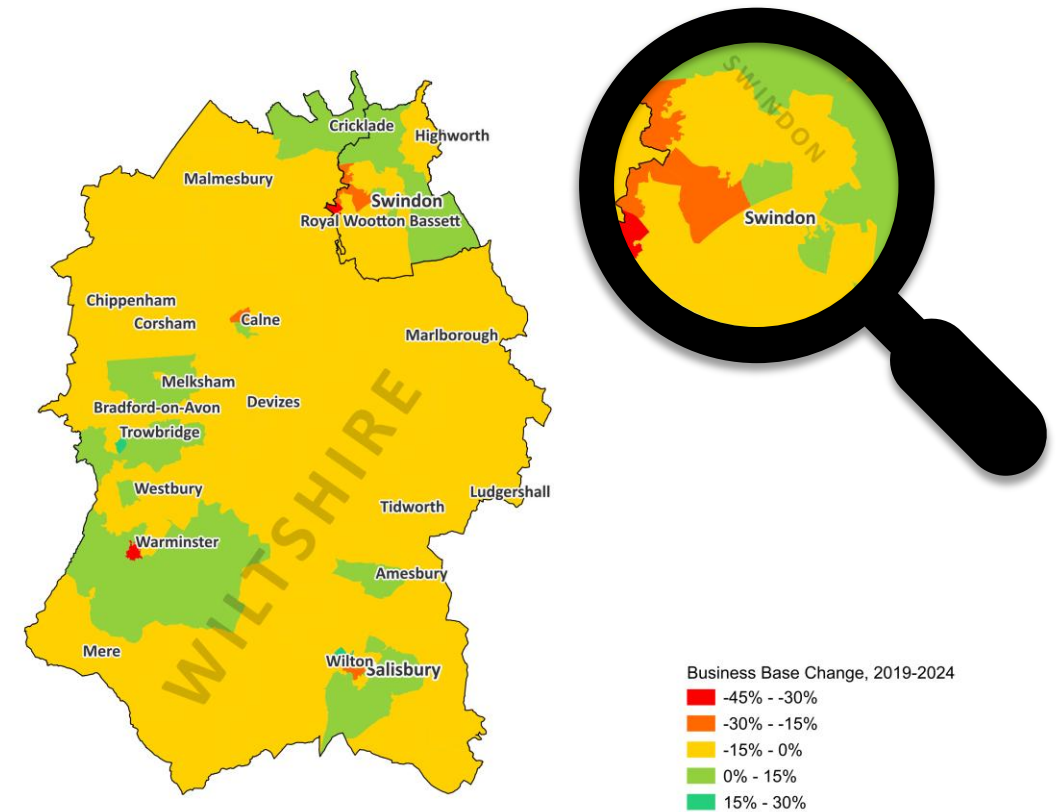
From 2022 to 2024, both England and the South West saw a decline in their business base, with losses of -2% and -1%, respectively. The economic challenges during this time, including high inflation, rising interest rates, and global supply chain issues, created a difficult environment for businesses nationwide. While the number of enterprises in Swindon and Wiltshire also contracted during this period (-2%), Swindon saw a more pronounced decline (-5%) compared to Wiltshire's smaller contraction (-1%).

This sharper decline in Swindon may indicate a greater vulnerability among its businesses, potentially due to a higher reliance on industries more sensitive to economic fluctuations, such as knowledge-intensive sectors. Additionally, Swindon's historically low business births compared to deaths could mean fewer new businesses were being created to offset closures, further contributing to the overall decline.

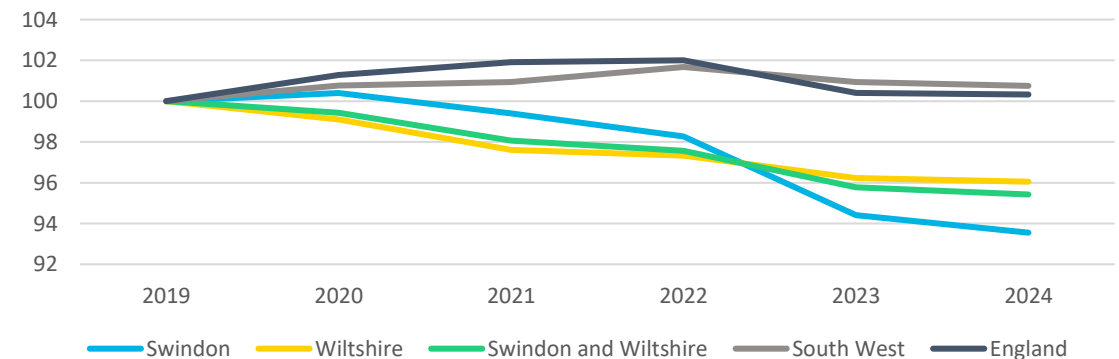
Several MSOAs in Swindon and Wiltshire saw business closures or no change in their business base. Only two areas—one in Salisbury and one in Trowbridge—experienced significant growth (over 15%). Wiltshire had a higher number and proportion of areas with business growth, while the areas within West Swindon, Central Swindon North, and Haydon Wick saw the highest closures. These areas also produced less output in 2022 than in 2019.

Source: ONS UK Business Counts, 2019-2024

Business Base % Change (2019-2024) by MSOA, Swindon and Wiltshire



Indexed Business Base Change (2019=100)



Economy – Business Base Change

Business growth in Swindon and Wiltshire lagged behind England across nearly all sectors

During 2019 and 2024, the transport and storage sector recorded the largest percentage increase in the number of enterprises at 20%, significantly outpacing the national growth rate in this sector (+5%). This growth was largely driven by Swindon, which experienced a notable 40% increase, while Wiltshire saw more modest growth, with the number of businesses remaining largely static (+1%).

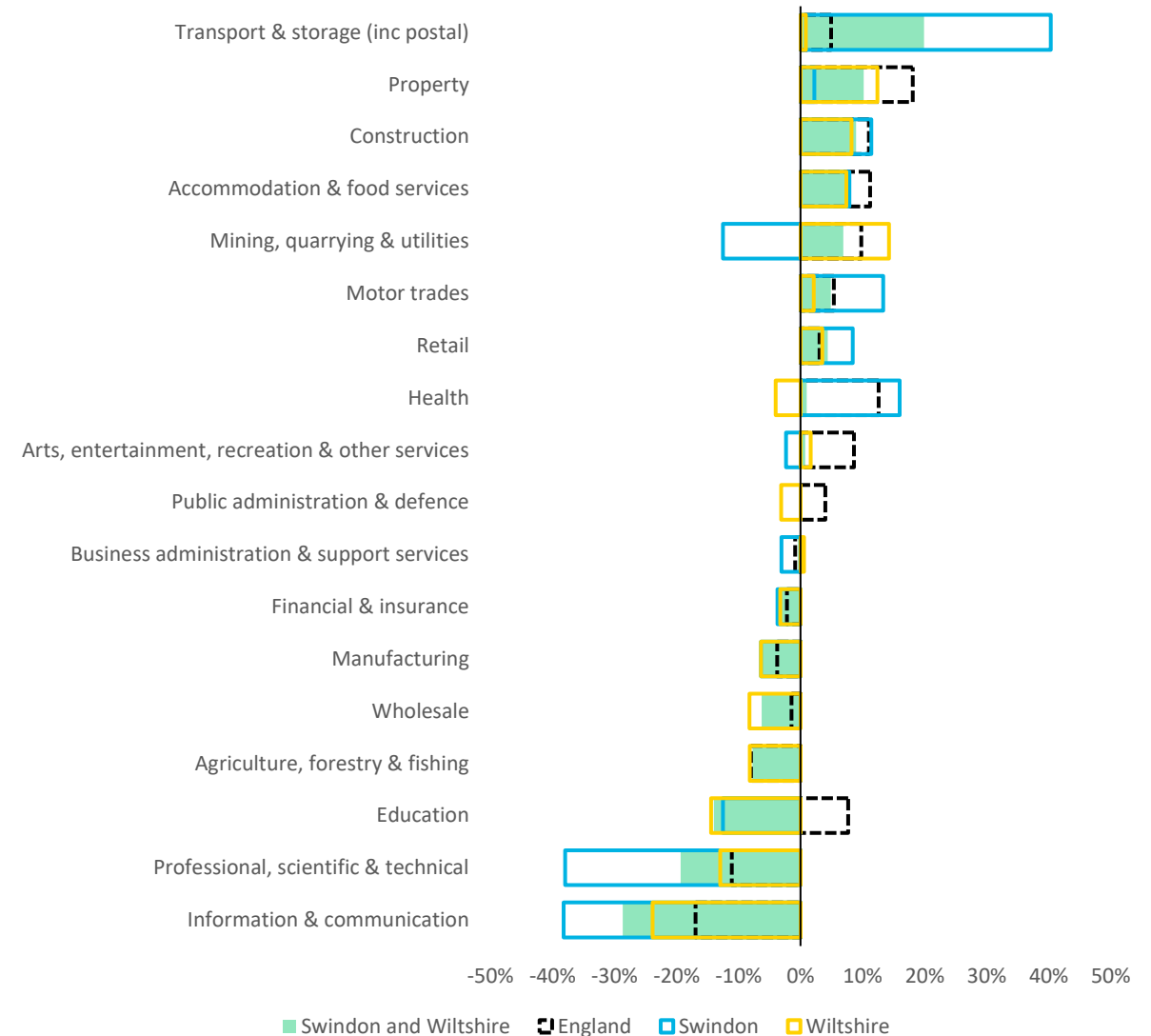
This surge in the number of transport and storage businesses primarily occurred between 2019 and 2022, a period marked by significant advancements in e-commerce and technological developments. However, since then, economic challenges such as rising fuel prices, supply chain disruptions, workforce shortages, and a return to pre-pandemic spending patterns contributed to a nationwide contraction in business numbers. This decline presents a challenge for Swindon and Wiltshire in maintaining their competitive advantage, particularly for Swindon given its higher reliance on this sector but relatively low productivity.

Other sectors such as property, construction, and accommodation and food also saw significant increases in their business base, although growth was below the national rate, with no local authority within Swindon and Wiltshire exceeding the national average. Essential sectors like education and health also experienced much lower growth than the national average.

Information and communication and professional, scientific and technical recorded the largest percentage decreases in the number of enterprises, particularly in Swindon (-38% in both sectors), significantly exceeding the national decline. The number of local units in these sectors also fell at a similar rate and scale (-37% and -36%), suggesting that businesses ceased trading rather than simply closing branches. Despite this contraction, GVA and employment data indicate that the remaining businesses are expanding in output, size and productivity. A key factor behind this trend could be sectoral consolidation, with larger firms outperforming smaller businesses. Notably, data indicates that the decline was driven primarily by micro businesses, which saw reductions of 30% and 20%, respectively, while the number of medium-sized and large businesses remained largely unchanged.

Source: ONS UK Business Counts, 2019-2024

Business Base Change by Broad Sector, 2019-2024

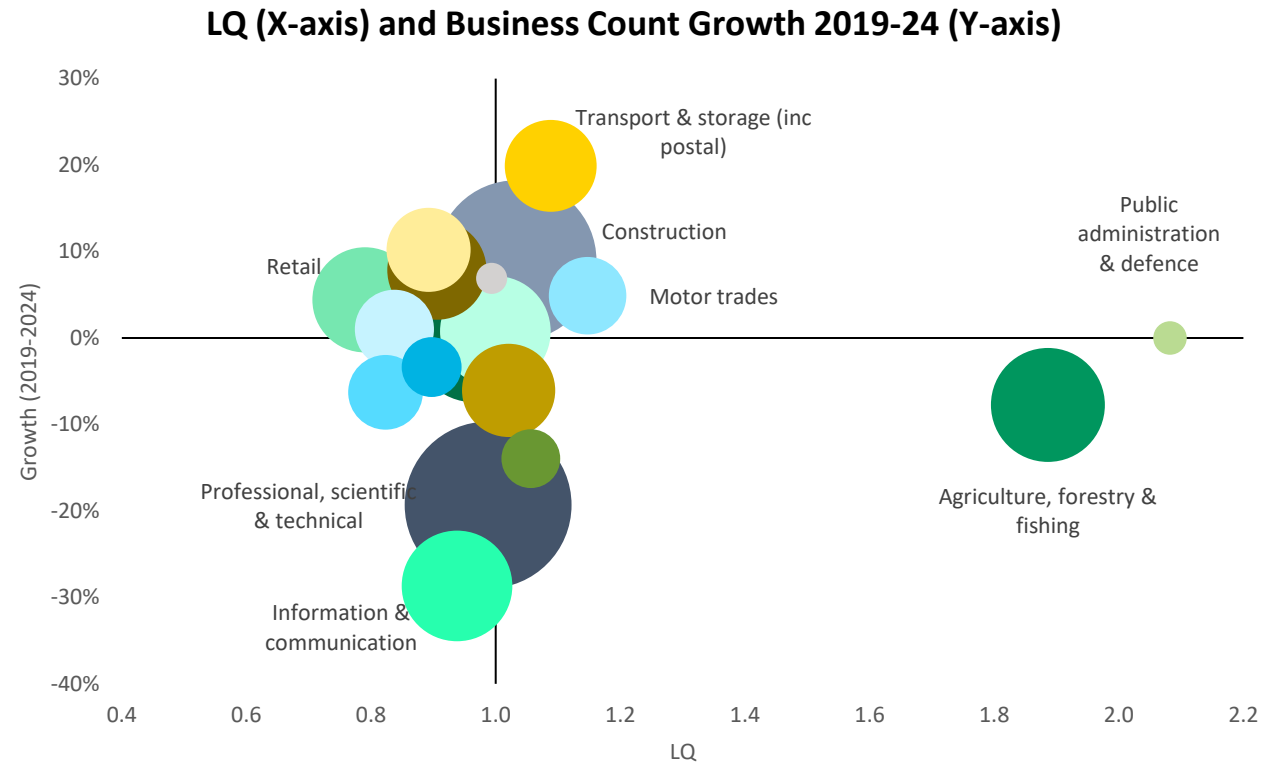


Economy – Business Specialisation

Swindon and Wiltshire exhibits high business specialisms in public administration and defence and agriculture, forestry and fishing

The Location Quotient (LQ) is a measure of how specialised/concentrated activity is in an area. It is based on the relative share of business count in an industry within an area compared to the share nationally. An LQ greater than 1 indicates relative specialisation/concentration.

The LQ analysis highlights that Swindon and Wiltshire has specialisms in five sectors, with notably higher concentrations of businesses in agriculture, forestry and fishing (LQ of 1.9) and public administration and defence (2.1) compared to the national average.



Sector	Business Count	% Share	% Change (2019-2024)	LQ
Professional, scientific & technical	4,470	16%	-19%	1.0
Construction	4,135	14%	9%	1.0
Business administration & support services	2,365	8%	0%	1.0
Agriculture, forestry & fishing	2,085	7%	-8%	1.9
Information & communication	1,965	7%	-29%	0.9
Arts, entertainment, recreation & other	1,965	7%	1%	1.0
Retail	1,775	6%	4%	0.8
Accommodation & food services	1,580	6%	8%	0.9
Manufacturing	1,395	5%	-6%	1.0
Transport & storage (inc postal)	1,355	5%	20%	1.1
Property	1,135	4%	10%	0.9
Health	1,005	4%	1%	0.8
Motor trades	965	3%	5%	1.1
Wholesale	895	3%	-6%	0.8
Financial & insurance	575	2%	-3%	0.9
Education	555	2%	-14%	1.1
Public administration & defence	180	1%	0%	2.1
Mining, quarrying & utilities	155	1%	7%	1.0

Economy

Source: ONS UK Business Counts, 2019-2024

Economy – Business Specialisation

Swindon and Wiltshire exhibit distinct business specialisms, but these are struggling to grow in Wiltshire

Although the public administration and defence sector represents a relatively small business base in Wiltshire (155), its LQ rises to 2.4. The county hosts world-leading innovative assets, including defence and security technologies at Porton Science Park, as well as a strong Army and Royal Air Force presence. Despite its strategic importance, the public administration and defence sector has contracted in Wiltshire by 3% over the past five years, while growing nationally. Similarly, agriculture, forestry and fishing remain a key specialism for Wiltshire, but the sector has also been in decline.

In contrast, Swindon demonstrates strong business specialisms in transport and storage (LQ 2.5), construction (1.2), and motor trades (1.2). These industries have outperformed the national average in business growth, reinforcing Swindon's urban and infrastructure-driven economic strengths.

Swindon Specialisms



Construction

Business LQ: 1.2
Business Count: 1,170
Business Growth: +11%



Transport & storage

Business LQ: 2.5
Business Count: 765
Business Growth: +40%



Motor trades

Business LQ: 1.2
Business Count: 255
Business Growth: +13%

Wiltshire Specialisms



Agriculture, forestry & fishing

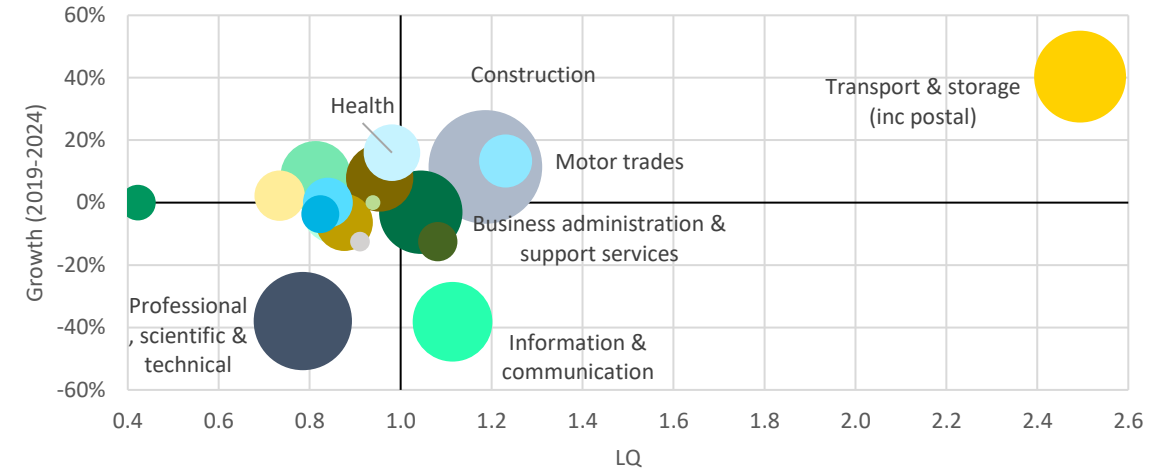
Business LQ: 2.4
Business Count: 1,970
Business Growth: -8%



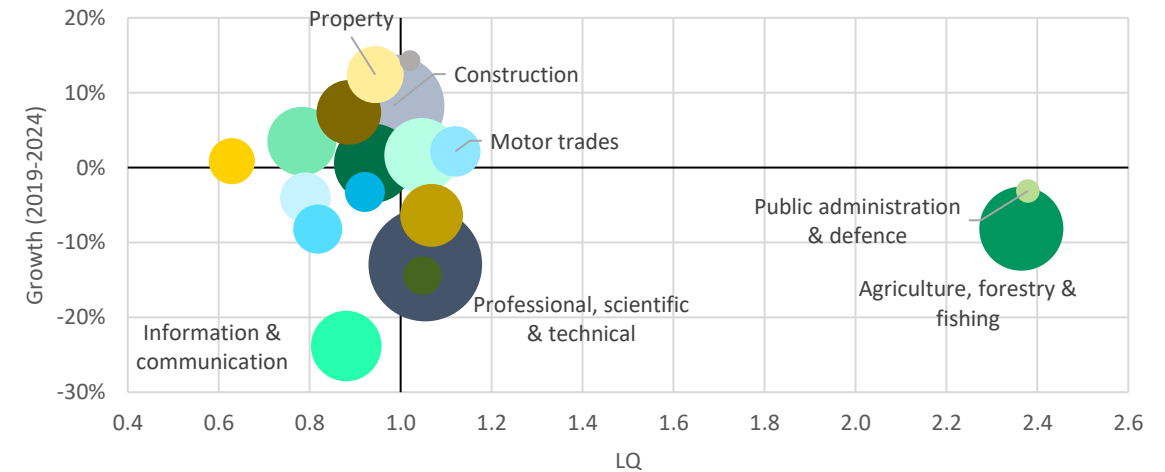
Public administration & defence

Business LQ: 2.4
Business Count: 155
Business Growth: -3%

LQ (X-axis) and Business Count Growth 2019-24 (Y-axis), Swindon



LQ (X-axis) and Business Count Growth 2019-24 (Y-axis), Wiltshire



Source: ONS UK Business Counts, 2019-2024

Economy – Business Specialisation

Swindon and Wiltshire specialise in some priority sectors, but business counts remain low and declining

The priority sectors of advanced manufacturing and engineering, defence, and environmental technologies are all relatively specialised in Swindon and Wiltshire compared to England, as indicated by their LQ. However, each of these sectors account for no more than 1% of the local business base, highlighting their limited scale. Among them, only environmental technologies experienced growth in the past five years, but at a significantly lower rate than nationally (+18%).

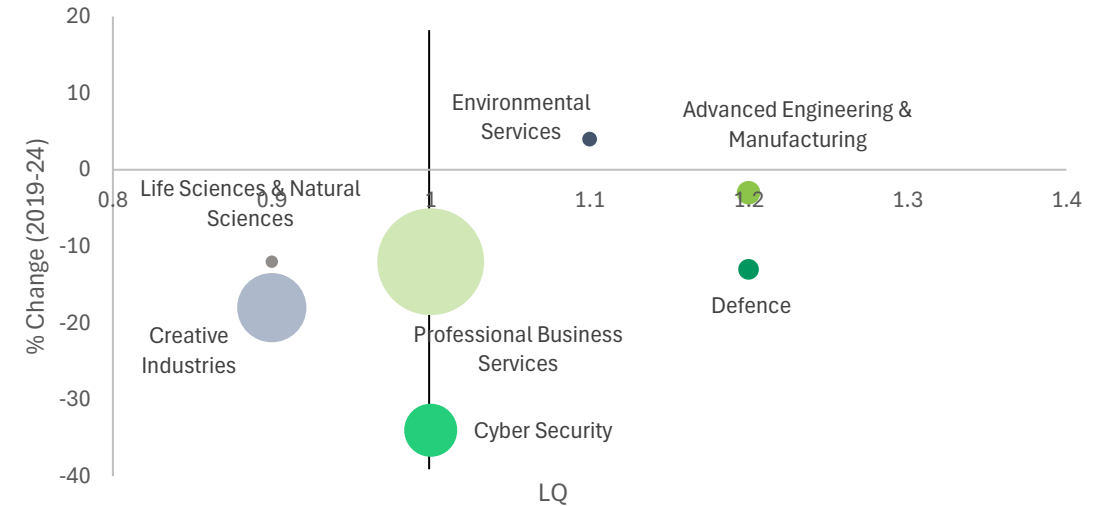
While professional business services, creative industries, and cyber security do not have higher business densities than England, their substantial business numbers and declines—ranging from 12% to 34% of active businesses—are a particular concern.

Within Swindon and Wiltshire, cyber security stands out as Swindon's strongest specialism (LQ of 1.3), while advanced manufacturing holds the same status in Wiltshire (LQ of 1.3). However, both sectors have seen a contraction in their business base. Additionally, although both areas also exhibit specialisms in defence (LQ of 1.2), the sector has faced a decline in business numbers.

The only specialised sector experiencing growth in businesses in Wiltshire, was environmental technologies both have an LQ of 1.2 and have expanded by 12%.

Despite a lack of growth in most priority sector business bases. These sectors remain important for Swindon and Wiltshire, notably more so for Wiltshire where all sectors are specialised or are close to being deemed specialised sectors through a business LQ measure.

LQ (X-axis) and Business Count Growth 2019-24 (Y-axis) for Priority Sectors



Key	Priority Sector	Swindon and Wiltshire				Swindon		Wiltshire	
		Total	% Share	% Change (2019-24)	LQ	% Change (2019-24)	LQ	% Change (2019-24)	LQ
	Professional Business Services	6,285	22%	-12%	1	-25%	0.8	-8%	1
	Creative Industries	2,640	9%	-18%	0.9	-33%	0.9	-12%	0.9
	Cyber Security	1,550	5%	-34%	1	-42%	1.3	-29%	0.9
	Advanced Manufacturing and Engineering	305	1%	-3%	1.2	0%	1	-4%	1.3
	Defence	235	1%	-13%	1.2	-15%	1.2	-14%	1.2
	Environmental Technologies	120	0%	4%	1.1	0%	1.1	12%	1.2
	Life Sciences including Natural Sciences	75	0%	-12%	0.9	-33%	0.5	-7%	2.1

Source: ONS UK Business Counts, 2019-2024

Economy – Business Start Up

Wiltshire achieved a positive net business birth rate in 2023, while Swindon remained negative

In 2023, Swindon and Wiltshire had a positive net birth rate of +10. This varied by local authority, with Wiltshire recording a positive net birth rate of +60, while Swindon experienced a negative rate of -50—the second lowest among comparator areas, with only Somerset recording a lower figure.

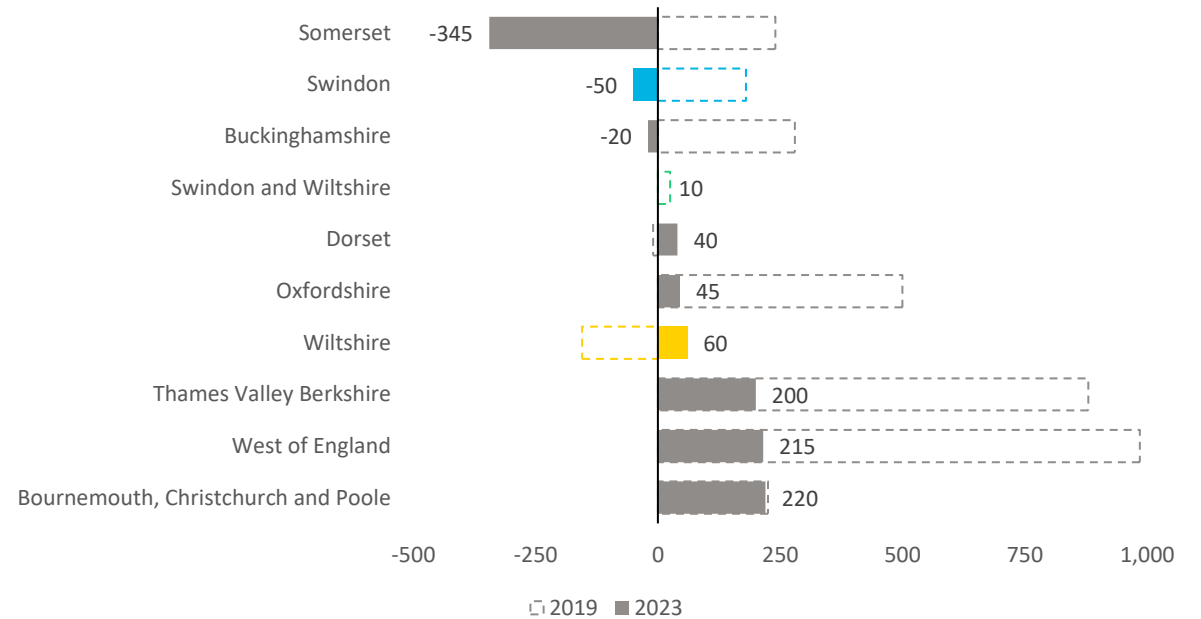
Most comparator areas saw a decline in net business births, with decreases ranging from -5 in Bournemouth, Christchurch and Poole to -770 in the West of England. Swindon and Wiltshire recorded the second smallest decline, dropping from +25 to +10. Notably, Dorset and Wiltshire were the only areas with an increase in net business births, with Wiltshire seeing a significant rise from -155 to +60.

Both Swindon and Wiltshire recorded a negative net business birth rate in 2022, reflecting national trends driven by high borrowing costs, rising energy and material prices, and weakening demand since late 2021. However, by 2023, only Wiltshire achieved a positive net birth rate.

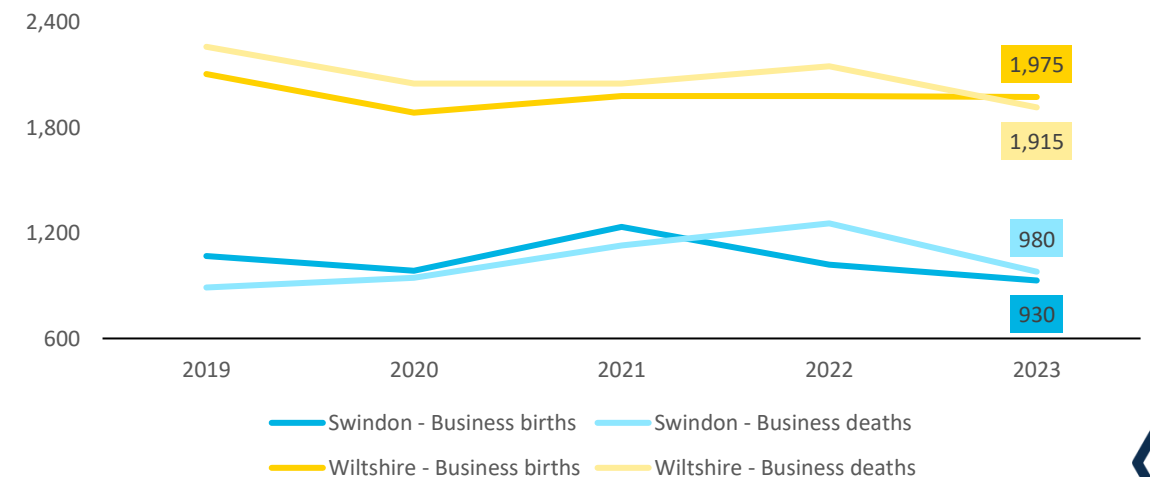
- In **Wiltshire**, business births dropped in 2020—likely due to the pandemic—before stabilising in the following years. Although business deaths outnumbered births until 2022, they fell to their lowest level in 2023, resulting in a positive net birth rate.
- In contrast, **Swindon** has faced persistent challenges in entrepreneurial activity and business survival, with business births declining since 2021 while business deaths continued to rise, overtaking births in 2022. Although business deaths fell sharply in 2023, they still outpaced births, limiting the expansion of Swindon's business base and potentially affecting employment and economic growth.

Source: ONS Business Demography, 2019-2023

Business Net Births, 2023



Business Births and Deaths, Swindon and Wiltshire



Economy – Business Survival Rates

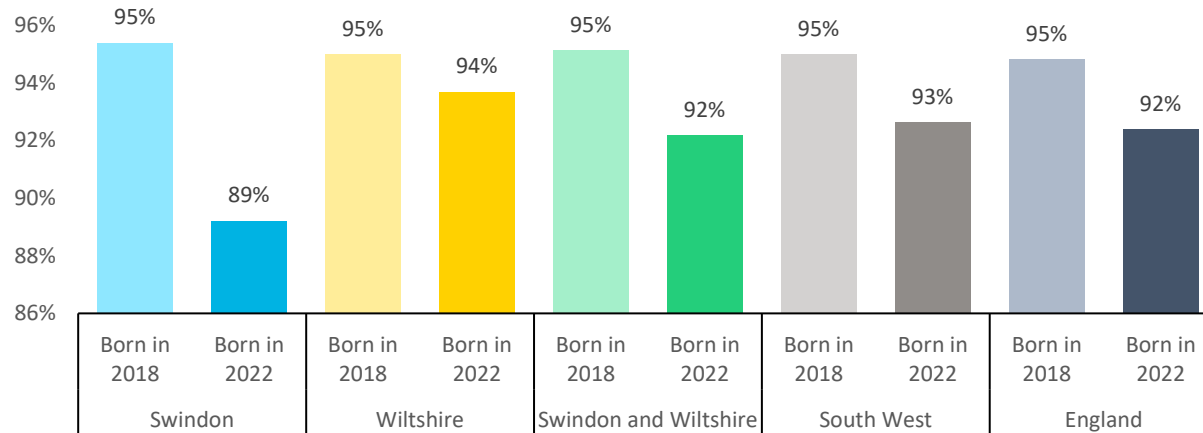
As of 2023, the 5-year survival rate of businesses in Swindon and Wiltshire was 41%

This is above the English average of 39% but below the South West average of 45%. Among comparator areas, only Thames Valley Berkshire has a lower business survival rate at 41%.

Within Swindon and Wiltshire, Wiltshire has a higher survival rate (43%) compared to Swindon (37%, the lowest among comparator areas). This may indicate strong business support mechanisms in Wiltshire that assure business resilience. However, given Wiltshire's lower productivity levels, it could also reflect a less competitive business environment that allows for less efficient businesses to remain functioning, contributing to higher survival rates.

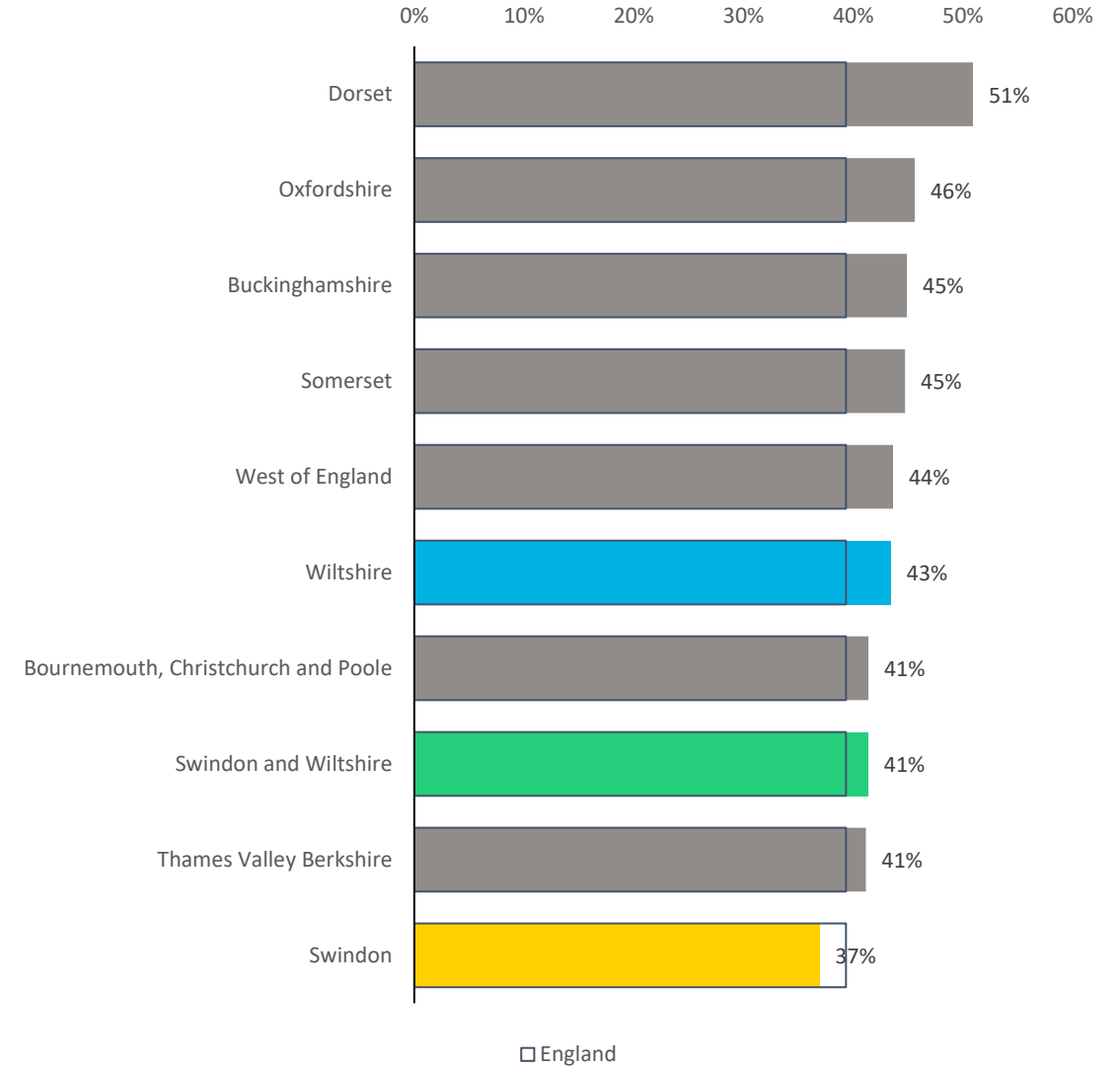
While one-year survival rates in Swindon and Wiltshire are more aligned with national and regional averages, Swindon has seen a sharp decline (from 95% in 2019 to 89% in 2023). Combined with falling business birth rates, this suggests that starting and sustaining a business in Swindon has become increasingly challenging in recent years.

1-Year Business Survival Rate



Source: ONS Business Demography, 2019-2023

5-Year Business Survival Rate, 2018-2023



Economy – Trade

Swindon and Wiltshire shows resilience in trade by strengthening their focus on non-EU markets

In 2022, the total value of imports for Swindon and Wiltshire amounted to £6.4bn, while exports were valued at £5.6bn, resulting in a negative trade balance for the area. Both Swindon and Wiltshire are net exporters of services but net importers of goods.

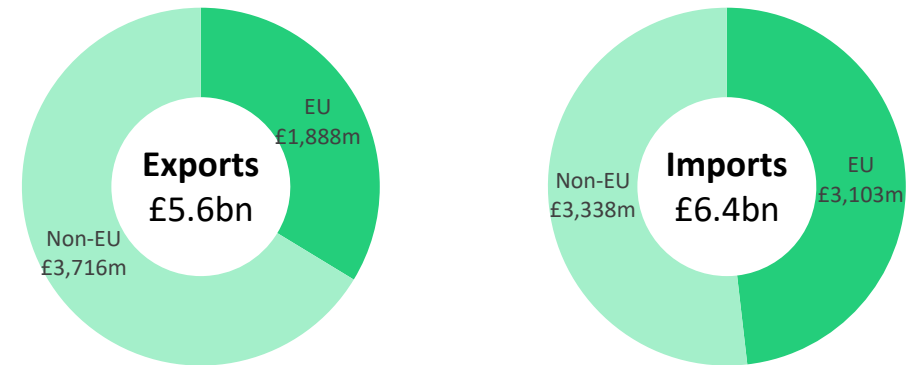
Trade with non-EU countries is more significant for Swindon and Wiltshire than trade with the EU, accounting for 66% of exports compared to 34%. Non-EU exports are higher in Swindon (72%, £2.4bn) than in Wiltshire (58%, £1.3bn). Similarly, imports of goods and services are slightly more dependent on non-EU countries (52%) than the EU (48%). However, this varies within the area, with 59% (£2.0bn) of Swindon's imports coming from non-EU countries compared to 44% (£1.3bn) in Wiltshire.

In the context of the UK's departure from the EU, this suggests a degree of resilience. While trade in Swindon and Wiltshire declined in 2020 due to the disruption caused by the COVID-19 pandemic, and recovery in 2021 was hindered by the friction between the UK and EU following the full implementation of Brexit in January 2021, 2022 saw a notable rebound in both imports and exports. Between 2019 and 2022, exports from Swindon and Wiltshire grew by 13% (+£633m), while imports increased by 14% (+£797m).

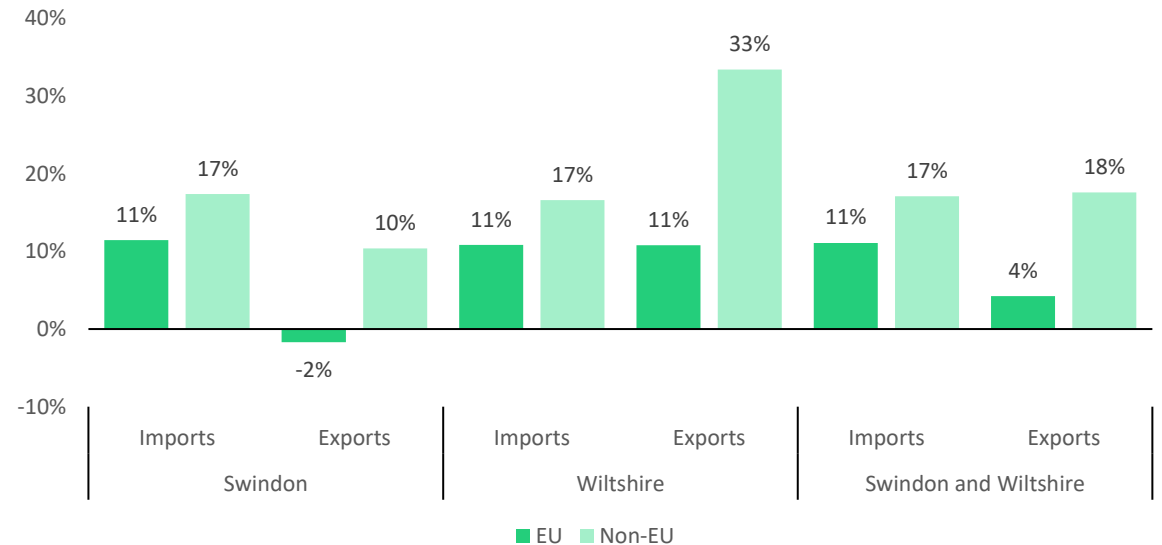
The recovery in trade has been particularly strong with non-EU countries, where exports rose by 18% (+£556m) and imports by 17% (+£487m). In comparison, exports from the EU grew by just 4% (+£77m) and imports by 11% (+£310m). Non-EU export growth has been especially strong in Wiltshire, rising by 33% (+£331m) compared to 10% (+£225m) in Swindon.

The recovery in trade for Swindon and Wiltshire, particularly with non-EU countries, highlights the area's ability to adapt in a post-Brexit and post-pandemic landscape. While challenges persist, such as export growth lagging behind the national average, the region's established and growing connections with non-EU markets could offer opportunities for continued economic growth.

Trade in Swindon and Wiltshire, 2022



Trade Value Change, 2019-2022



Source: ONS Subnational trade timeseries, 2022

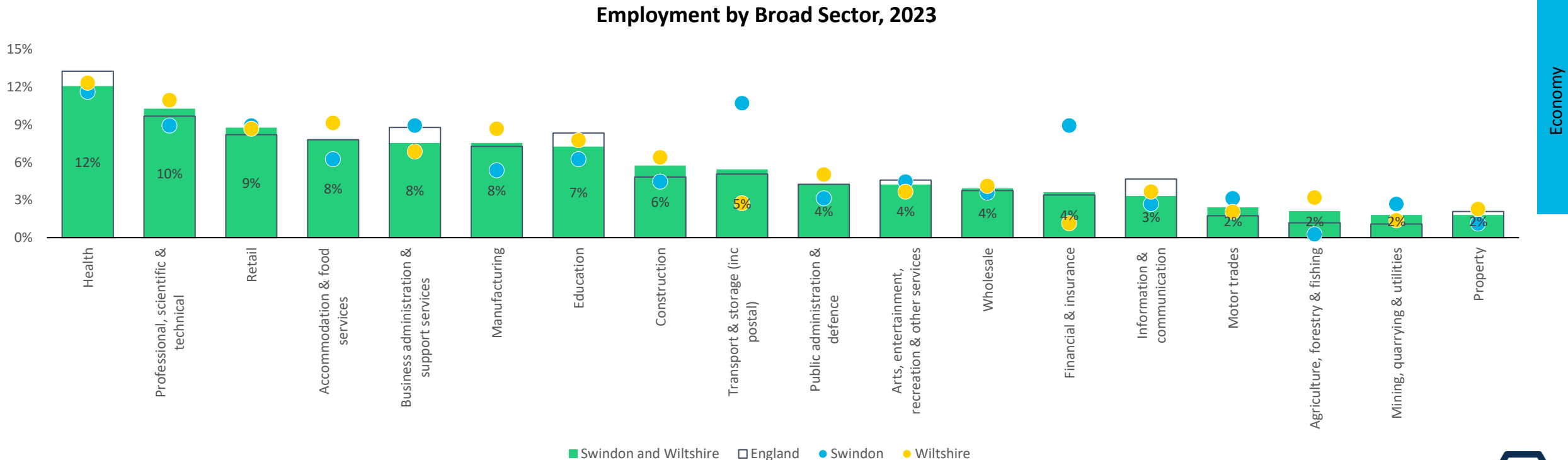
Economy – Employment

Employment in Swindon and Wiltshire is diverse, with no sector dominating and notable differences between Swindon and Wiltshire

In 2023, total employment in Swindon and Wiltshire reached 331,000, with 66% of jobs based in Wiltshire. This figure includes both residents working within the area and commuters.

Employment across Swindon and Wiltshire is spread across a variety of sectors, with no single sector making up more than 12% of total employment. The largest sector is health, which accounts for 12% of total employment, aligning with the national average of 13%. Other significant sectors include professional, scientific, and technical services (10%) and retail (9%).

There are notable sectoral differences between Swindon and Wiltshire. In Swindon, the financial and insurance sector accounts for 9% of jobs, compared to just 1% in Wiltshire. The transport and storage sector is also a major employer in Swindon, making up 13% of jobs, compared to 3% in Wiltshire and 5% nationally. Conversely, manufacturing and accommodation and food services are more prominent in Wiltshire, each accounting for 9% of jobs, compared to 5% and 6% in Swindon.



Source: Business Register and Employment Survey, ONS, 2023

Economy – Employment Growth

Swindon and Wiltshire face divergent employment trajectories and low job densities

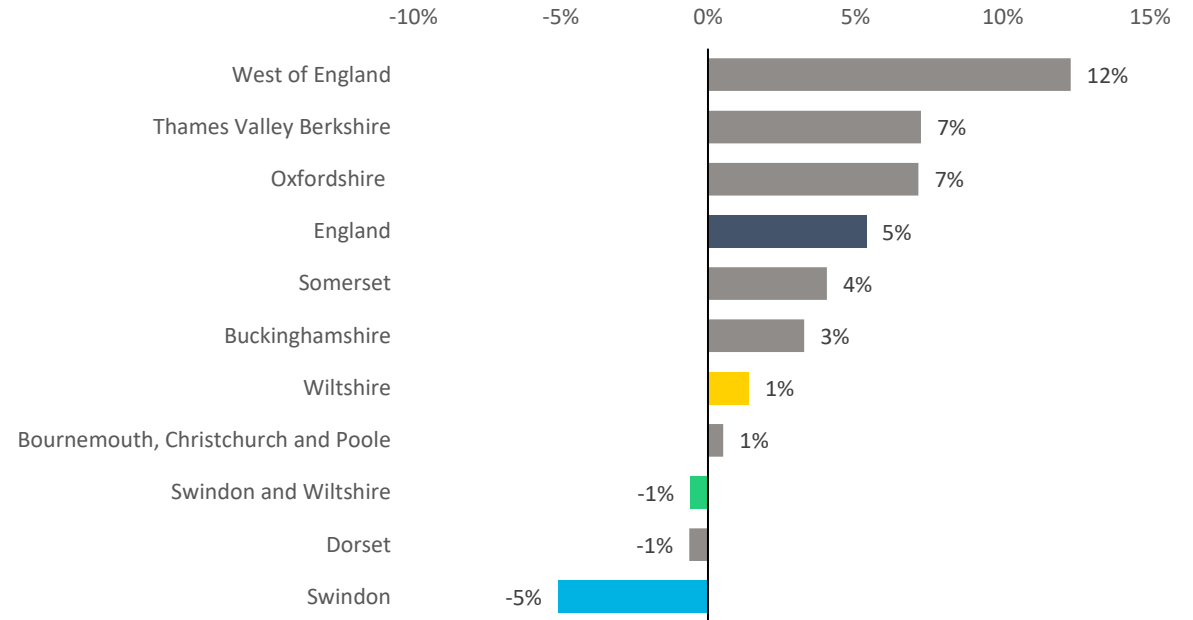
The total number of people employed in Swindon and Wiltshire decreased by 2,000 between 2018 and 2023, a decline of 1%. This contrasts with the national trend, which saw a 5% increase. Swindon and Wiltshire experienced significant job losses during the pandemic, with employment falling by 3% between 2019 and 2020. Since then, employment levels have remained largely static, with an average annual growth rate of just 0.3%, below the national average of 2% over the same period.

While employment in Wiltshire grew by 1% between 2018 and 2023, adding 3,000 jobs to the economy, Swindon experienced the largest decline among comparator areas, with a 5% decrease (or -6,000 jobs). Employment trends in the two areas have followed different trajectories: Wiltshire has seen a gradual but steady recovery from the pandemic, while Swindon's employment base has continued to shrink, with another notable decline of 2% in 2023.

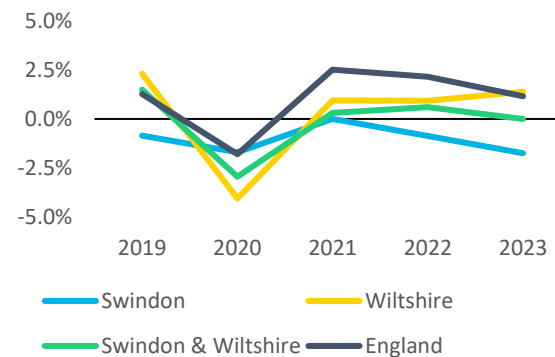
Alongside this decline in employment, Swindon and Wiltshire's job density has also decreased. In 2019, the area had a job density of 0.92 jobs per working-age resident (16-64), higher than the national average of 0.88. By 2022, this figure fell to 0.83, meaning there were enough jobs to provide work for only 83% of working-age residents. Both Swindon and Wiltshire now have lower job density than the national level (0.88) and comparator areas, which range from 0.86 in Somerset to 1.00 in Thames Valley Berkshire.

The low job density in Swindon and Wiltshire and declining employment and business base suggest limited employment opportunities compared to other areas. This could indicate a need for targeted policy intervention to boost job creation, particularly in Swindon, where the employment base continues to shrink.

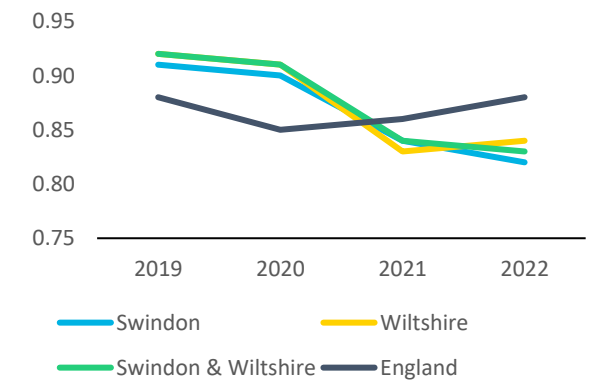
Employment Change, 2018-2023



Annual Employment Change



Job Density



Source: Business Register and Employment Survey, ONS, 2018-2023; ONS Job Density, 2019-2022

Economy – Employment Growth

A declining employment market with stark sectoral differences

The mining, quarrying & utilities sector saw the largest percentage increase, rising by 33%, though from a relatively small base of 4,500 jobs. This was followed by the construction sector, which grew by 19%, adding 3,000 jobs—significantly outpacing the national growth rate of 7%. Growth in this sector was observed in both Swindon (+11%) and Wiltshire (+17%). The expansion in employment, business base, and GVA within construction may be linked to increasing investment in infrastructure projects in the area.

The transport and storage sector also experienced strong growth, increasing by 13% compared to 10% nationally. This growth was particularly pronounced in Swindon (+33%), while employment remained stable in Wiltshire. Meanwhile, accommodation and food services, an important employer in Wiltshire, saw a 5% rise in employment, though this was below the national growth rate of 10%.

In contrast, wholesale and manufacturing experienced sharp declines, contracting by 24% and 14%, respectively, resulting in a total loss of 8,000 jobs. The job losses in the wholesale sector were mainly registered in Wiltshire (-3,000), while the job losses in manufacturing occurred entirely in Swindon (-4,000). The decline in Swindon's manufacturing sector can largely be attributed¹ to the closure of the Honda plant in 2021, which employed 3,500 people as of 2019.

The financial and insurance sector, a key employer in Swindon, also saw a notable decline in employment (-9%), in stark contrast to the 5% growth observed nationally. However, the sector expanded considerably in terms of GVA (+19% between 2019 and 2022), suggesting that increased productivity and higher-value activities have allowed it to generate greater output despite employing fewer businesses and workers.

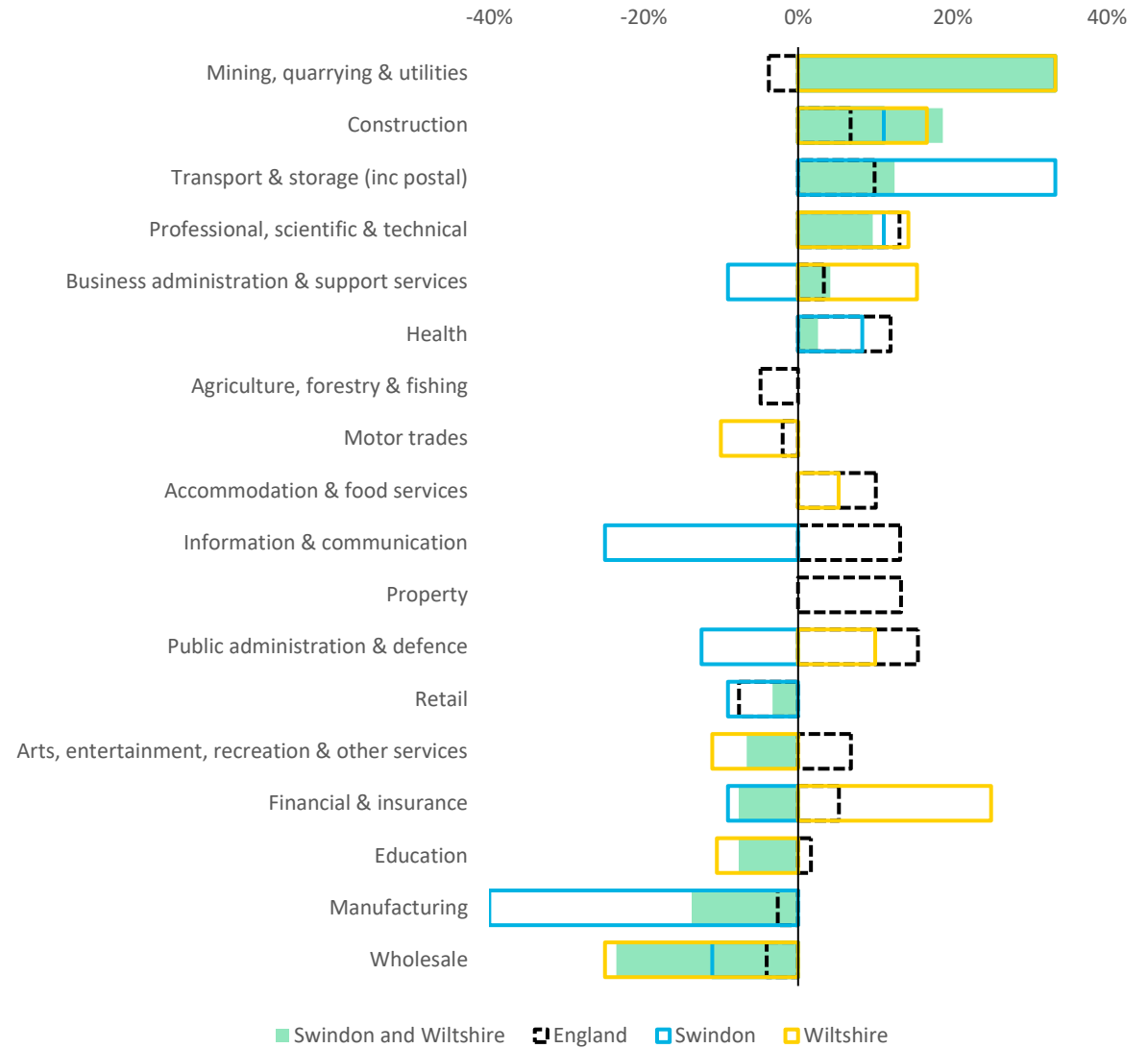
In contrast, the information and communication sector in Swindon declined in both employment, businesses and GVA. This indicates an overall contraction in the industry, highlighting challenges in attracting and retaining tech-related businesses and talent in the area.

Wiltshire has seen a significant increase in employment in higher-skilled knowledge-based industries. The financial and insurance sector grew by 25% in Wiltshire, far outpacing the national growth. Business administration and support grew by 15%, compared to 3% nationally, while professional, scientific, and technical services saw a 14% increase, slightly ahead of England's 13% growth.

Source: Business Register and Employment Survey, ONS, 2018-2023

¹ Around 3,000 job losses were recorded in the subsector of 'Manufacture of motor vehicles, trailers and semi-trailers', in the LSOA Swindon 009C, where the Honda plant was located.

Employment Growth by Broad Sector, 2018-2023



Economy – Employment Specialisms

Swindon and Wiltshire exhibit distinct employment specialisms with limited growth

Swindon and Wiltshire has notably higher concentrations of employment in agriculture, forestry and fishing, mining, quarrying and utilities, and motor trades than the national average. However, none of these sectors represent more than 2% of the employment base.

Swindon exhibits strong employment specialisms in transport and storage (LQ of 2.1), financial and insurance (2.6), and motor trades (1.8). However, only transport and storage is growing.

Wiltshire shows specialisms in manufacturing (1.2), construction (1.3), and agriculture, forestry and fishing (2.7), though only construction is growing. Despite being primary and secondary industries, construction and manufacturing in Wiltshire generate high GVA per job, with an economic contribution exceeding the national average.

Swindon Specialisms



Transport & storage

Employment LQ: 2.1
Employment Count: 12,000
Employment Growth: +3,000



Financial & insurance

Employment LQ: 2.6
Employment Count: 10,000
Employment Growth: -1,000



Motor trades

Employment LQ: 1.8
Employment Count: 3,500
Employment Growth: 0



Mining, quarrying & utilities

Employment LQ: 2.5
Employment Count: 3,000
Employment Growth: +750

Wiltshire Specialisms



Manufacturing

Employment LQ: 1.2
Employment Count: 19,000
Employment Growth: 0



Construction

Employment LQ: 1.3
Employment Count: 14,000
Employment Growth: +2,000



Agriculture, forestry & fishing

Employment LQ: 2.7
Employment Count: 7,000
Employment Growth: 0



Mining, quarrying & utilities

Employment LQ: 1.3
Employment Count: 3,000
Employment Growth: +750

Swindon and Wiltshire Broad Sectors	Total Employment	% Share	% Change (2018-2023)	Employment LQ
Health	40,000	12%	3%	0.9
Professional, scientific & technical	34,000	10%	10%	1.1
Retail	29,000	9%	-3%	1.1
Accommodation & food services	26,000	8%	0%	1.0
Business administration & support services	25,000	8%	4%	0.9
Manufacturing	25,000	8%	-14%	1.0
Education	24,000	7%	-8%	0.9
Construction	19,000	6%	19%	1.2
Transport & storage	18,000	5%	13%	1.1
Public administration & defence	14,000	4%	0%	1.0
Arts, entertainment, recreation & other services	14,000	4%	-7%	0.9
Wholesale	13,000	4%	-24%	1.0
Financial & insurance	12,000	4%	-8%	1.1
Information & communication	11,000	3%	0%	0.7
Motor trades	8,000	2%	0%	1.4
Agriculture, forestry & fishing	7,000	2%	0%	1.8
Mining, quarrying & utilities	6,000	2%	33%	1.7
Property	6,000	2%	0%	0.9

Source: Business Register and Employment Survey, ONS, 2018-2023

Economy – Employment Specialisms

Of the priority sectors, environmental technologies and life sciences lead in both specialisms and growth

In Swindon and Wiltshire, employment in the creative industries and cyber security is lower than in England (as measured by location quotient, LQ), while employment in professional business services is in line with the national average. The other priority sectors are all relatively specialised compared to England, with life sciences showing the highest specialisation (LQ of 2.6).

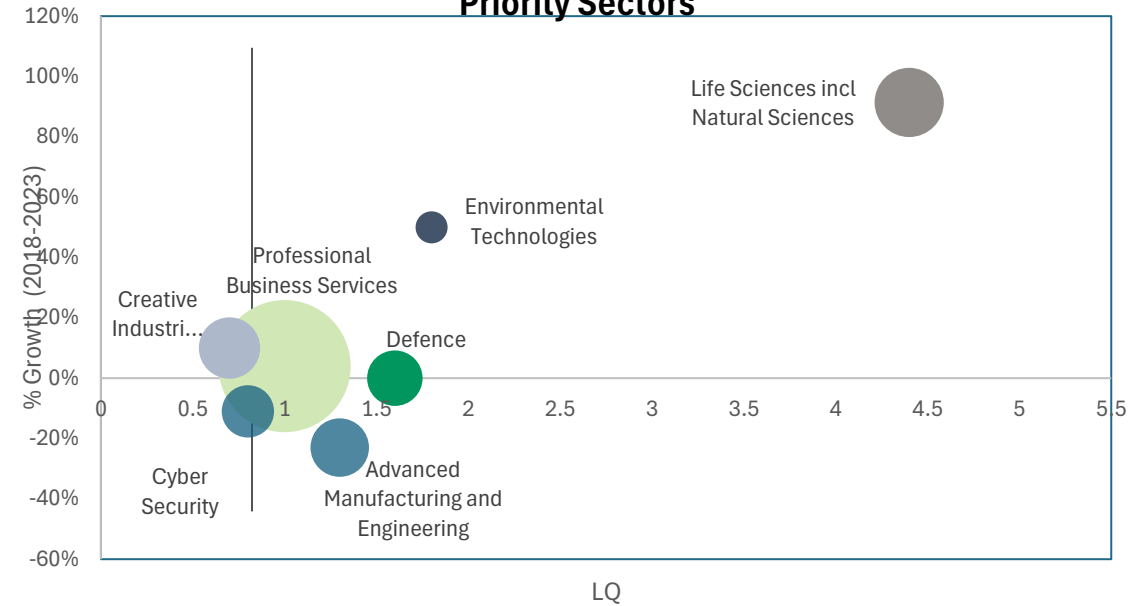
The largest priority sector in both Swindon and Wiltshire is professional business services, accounting for 18% of total employment in Swindon and 14% in Wiltshire. Employment in this sector has only exceeded the national average in Swindon (LQ 1.2). Despite this, the sector has declined by 5% since 2018, in contrast to national growth of 10% and an 11% increase in Wiltshire.

Both Swindon and Wiltshire exhibit specialisms in life sciences, environmental technologies, defence, and advanced manufacturing and engineering. However, employment growth has been uneven. In Swindon, the only growing specialism is environmental technologies, the smallest of these sectors, which has expanded by 39% to 1,250 jobs. Half of this sector's employment is in 'collection of non-hazardous waste', which provides 700 jobs, adding 200 jobs (+40%) over the past five years.

In contrast, Wiltshire has seen either growth or stagnation across all its specialisms, with growth rates ranging from 0% in advanced manufacturing and engineering to 100% in environmental technologies. Within environmental technologies, 'collection of non-hazardous waste' has grown significantly, rising from 200 jobs in 2018 to 700 in 2023 (+250%), alongside 'recovery of sorted materials', which doubled from 300 to 600 jobs. In life sciences, nearly half of employment is in 'research and experimental development on biotechnology', which currently employs 800 people in Wiltshire—a 33% increase since 2019 (+200 jobs).

Despite challenges in growth over the past 5 years of data, these priority sectors are still relevant for both Swindon and Wiltshire, with high employment LQs in most priority sectors. Creative industries and cyber security are the only priority sectors where there is not a strong employment LQ in Swindon or Wiltshire, it may be that if these sectors continue to contract, they may become less of a priority in the medium to long term future.

LQ (X-axis) and Employment Growth 2018-23 (Y-axis) for Priority Sectors



Key	Priority Sector	Swindon and Wiltshire				Swindon		Wiltshire	
		Total	% Share	% Change	LQ	% Change	LQ	% Change	LQ
	Professional Business Services	51,000	15%	4%	1.0	-5%	1.2	11%	0.9
	Creative Industries	11,000	3%	10%	0.7	0%	0.5	14%	0.7
	Advanced Manufacturing and Engineering	10,000	3%	-23%	1.3	-50%	1.4	0%	1.2
	Defence	9,000	3%	0%	1.6	-33%	1.1	17%	1.9
	Cyber Security	8,000	2%	-11%	0.8	-25%	0.6	0%	0.9
	Environmental Technologies	3,000	1%	50%	1.8	39%	2.2	100%	1.8
	Life Sciences incl Natural Sciences	14,000	4%	91%	4.4	70%	4.9	103%	5.8

Source: Business Register and Employment Survey, ONS, 2018-2023

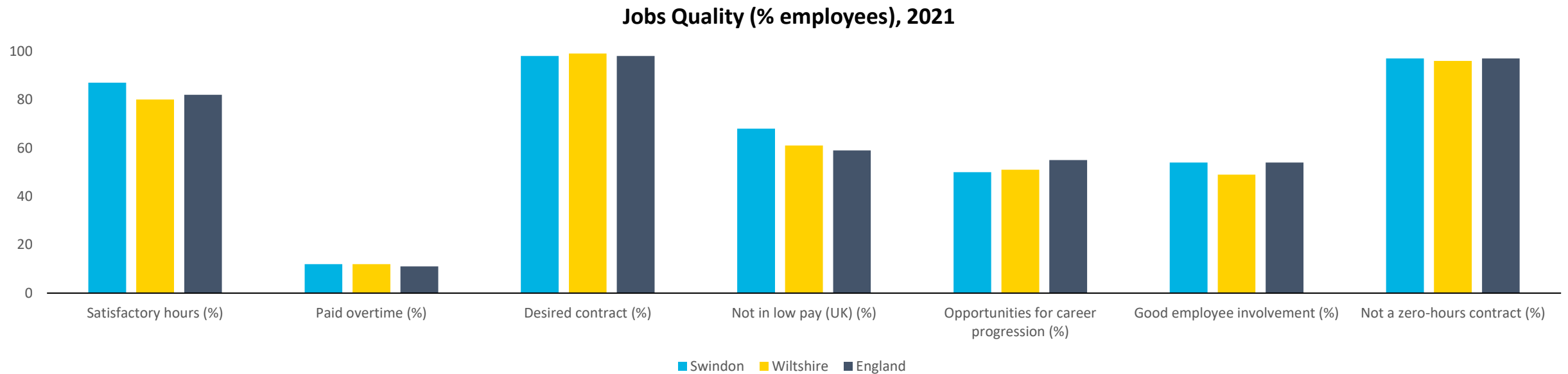
Economy – Jobs Quality

Swindon generally performs well on key job quality indicators, often exceeding Wiltshire and national averages

The majority of workers in both Swindon (87%) and Wiltshire (80%) are satisfied with their hours, with Swindon performing better than both Wiltshire and England (82%). Zero-hours contracts are also relatively uncommon, with 97% in Swindon and 96% in Wiltshire on more stable contracts, aligning closely with the national rate (97%). This aligns with almost the entire workforce in Swindon (98%) and Wiltshire (99%) having their desired contract type.

A similar proportion of workers in both areas (12%) reports working paid overtime hours, slightly above the England average (11%). More notably, a higher share of Swindon workers (68%) earn above the UK low-pay threshold compared to Wiltshire (61%) and England overall (59%), suggesting stronger wage conditions.

Swindon (54%) matches the national average (54%) for good employee involvement in decision making, whereas Wiltshire lags slightly behind (49%). However, opportunities for career progression appear weaker in both areas (50% in Swindon, 51% in Wiltshire) compared to England (55%), which may indicate potential barriers to moving up.



Source: Annual Population Survey, 2021

Economy – Home Working

Swindon and Wiltshire present similar home working rates than nationally

The ability to work from home offers individuals a greater degree of flexibility while also presenting opportunities for productivity gains.

In 2021, 33% of Swindon and Wiltshire residents in employment worked primarily from home, in line with the national average (32%) and exceeding the regional rate (30%). However, homeworking rates varied within the area, with 34% of Wiltshire residents working mainly from home compared to 31% in Swindon.

Although the Census 2021 data reflects a period when government guidance encouraged homeworking, it still provides valuable insights into the region's economic and labour market flexibility.

For example, homeworking patterns in Swindon and Wiltshire differ significantly by industry. The highest proportion of remote workers is found in the financial, real estate, professional, and administrative sectors (56%), while the construction sector has the lowest rate (16%). While job roles largely determine homeworking potential, other factors such as digital connectivity and workforce digital skills may also play a role.

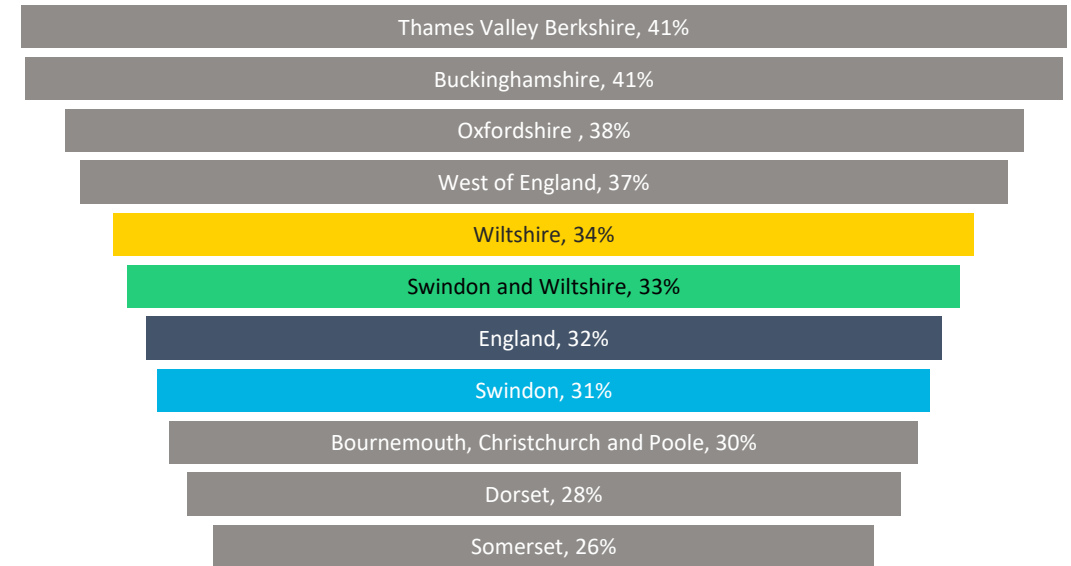
Within Swindon and Wiltshire, only Swindon lags behind national homeworking rates in key sectors:

- Manufacturing: 21% in Swindon vs. 25% in England
- Public administration, education, and health: 24% vs. 28%
- Transport and communication: 43% vs. 46%

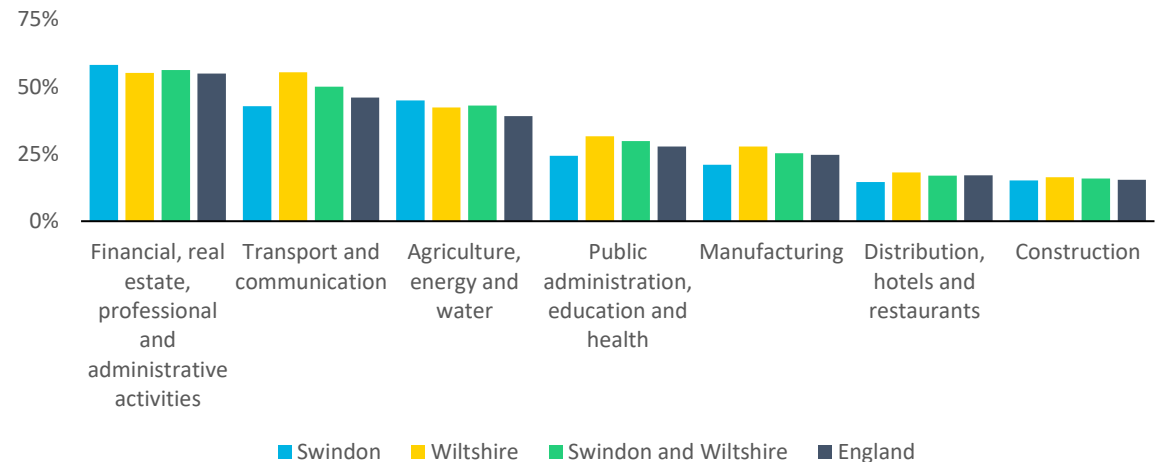
These homeworking gaps suggest that some workers in Swindon may be missing out on the flexibility, digital skills, and productivity benefits that remote work can offer. Given that these sectors are crucial to Swindon's employment base, addressing barriers to remote work could further enhance long-term productivity in the area.

Source: Census 2021, ONS

Homeworking, 2021



Homeworking by Industry, 2021



Economy – Swindon Travel to Work

Swindon has a net outflow of commuters, meaning more people leave the area for work than people commute into it

Oxfordshire and Berkshire attract a significant proportion of Swindon's residents (22% and 14% of total outflow, respectively). West of England contributes more commuters to Swindon (8% of inflow) than it draws away (4% of outflow), likely influenced by strong rail connections.

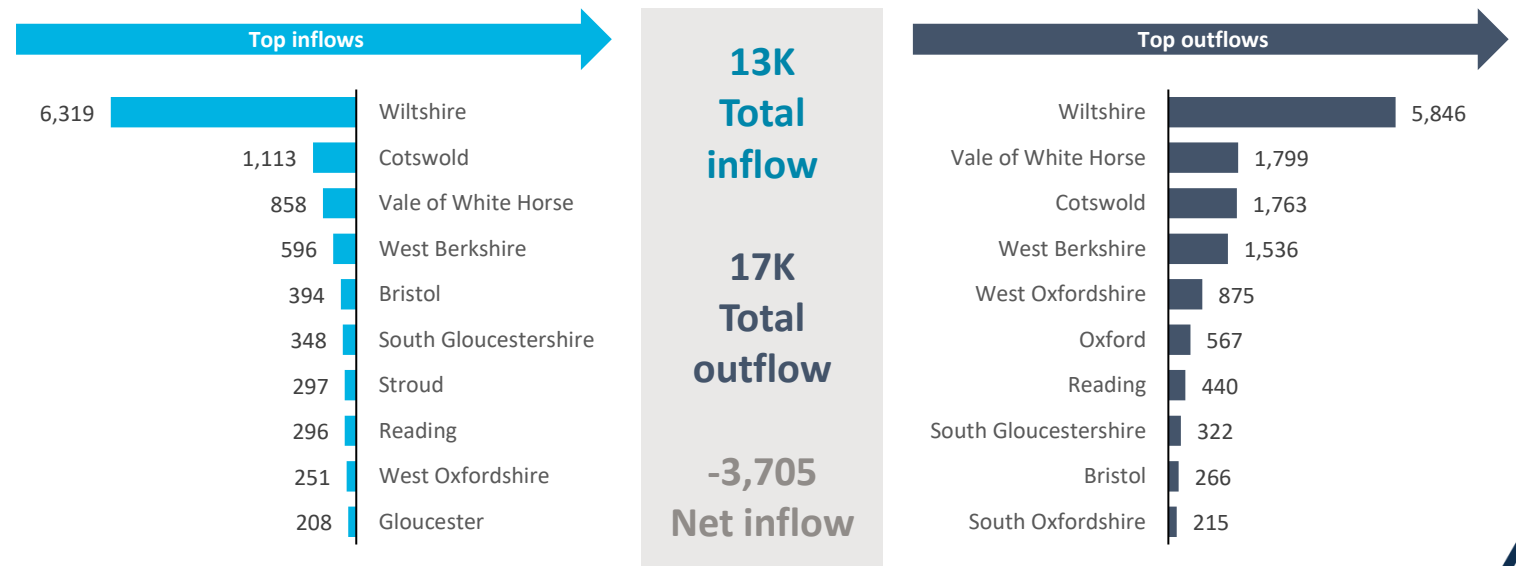
Swindon has low job density and, according to the ONS Jobs Quality 2021 report, the area lags behind the national average in career progression opportunities, suggesting that professional development prospects may be limited. However, housing in Swindon is more affordable, which could make it an attractive place to live. In contrast, areas like Vale of White Horse in Oxfordshire and West Berkshire in Thames Valley Berkshire offer higher workplace earnings and jobs per working age population, but they also have more expensive housing. This may explain why these areas attract more residents from Swindon for work than vice versa.

This suggests that Swindon's commuter patterns are likely shaped by a combination of factors: the search for better-paying and more career-advancing positions elsewhere, and the appeal of Swindon's lower cost of living, which encourages people to live there despite commuting out for work, and transport connectivity. Despite this, Swindon has a significantly lower proportion of residents working outside the local authority (14%) compared to the national average (26%). This suggests that, while some residents commute elsewhere for better career progression and earnings, Swindon remains effective at retaining local talent, including people in lower-paid jobs that support local services rather than traditional careers pathways.

Swindon	Inflow		Outflow	
Wiltshire	6,319	49%	5,846	35%
Oxfordshire	1,319	10%	3,594	22%
Thames Valley Berkshire	1,012	8%	2,266	14%
West of England	1,009	8%	733	4%
Somerset	49	0%	44	0%
Dorset	37	0%	36	0%
Buckinghamshire	27	0%	64	0%

Source: Census 2021, ONS. Note: The Census 2021 was undertaken during the Coronavirus pandemic when large parts of the UK economy were under lockdown and people were encouraged to work from home.

Top Commuters Flows with Swindon, 2021



Economy – Wiltshire Travel to Work

Wiltshire has a net outflow of commuters, meaning more people leave the area for work than people commute into it

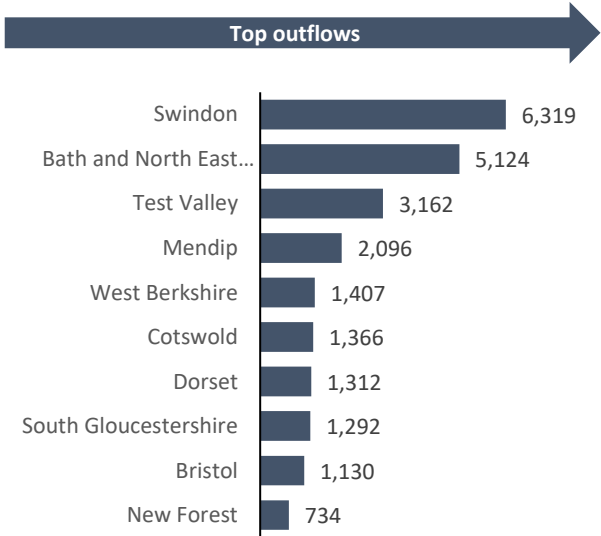
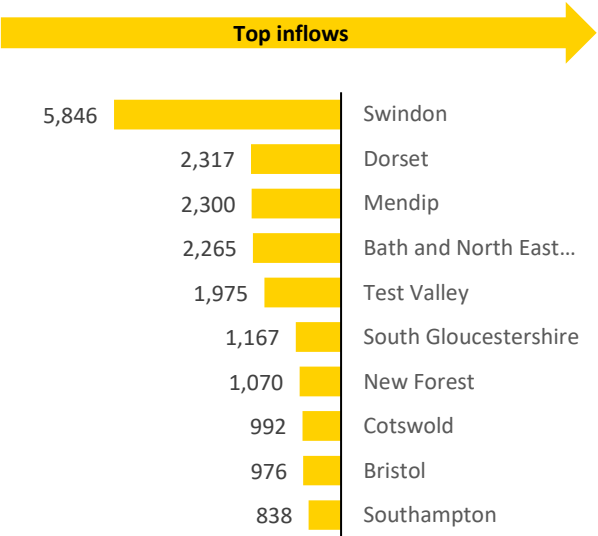
More Wiltshire residents choose to work in Swindon than vice versa. This trend may be driven by Swindon’s strong economy, which boasts major employers in finance, professional services, manufacturing, and logistics, offering higher-paid job opportunities that attract workers from Wiltshire. Local authorities in the West of England also attract a significant proportion of Wiltshire's residents, with Bath and North East Somerset concentrating 16% of commuters.

According to the ONS Jobs Quality 2021 report, Wiltshire ranks low in several job quality metrics, including satisfactory working hours, employee involvement, and workers not in low pay, suggesting high-quality employment opportunities may be more limited in Wiltshire. In contrast, the lower deprivation levels in Wiltshire, particularly in health and crime, alongside its quieter, rural lifestyle, could be making it a more attractive place to live for those who can afford to buy or rent there while commuting somewhere else.

Wiltshire has a low proportion of residents working outside the local authority (13%) compared to the national average (26%). This suggests that, while some residents commute elsewhere for better, high-paid jobs, Wiltshire still performs well in retaining local talent. This high retention rate may be partly due to the area’s high reliance on cars for commuting, especially in rural areas, which can limit out-commuting opportunities.

Top Commuter Flows with Wiltshire, 2021

Wiltshire	Inflow		Outflow	
Swindon	5,846	19%	6,319	20%
West of England	4,598	15%	7,694	24%
Somerset	3,092	10%	2,585	8%
Dorset	2,928	9%	1,639	5%
Thames Valley Berkshire	743	2%	1,778	6%
Oxfordshire	367	1%	1,022	3%
Buckinghamshire	71	0%	87	0%



Source: Census 2021, ONS. Note: The Census 2021 was undertaken during the Coronavirus pandemic when large parts of the UK economy were under lockdown and people were encouraged to work from home.

Economy – Policy Implications

Output and Productivity

Combined, Swindon and Wiltshire have seen a relatively healthy economic recovery since the COVID-19 pandemic. Between 2019 and 2022 (latest GVA data), the combined areas have seen output increase by 3%, a higher rate than the national growth rate during this period of 2%. Wiltshire accounts for over half (56%) of the economic output in the two local authorities with GVA of £14.4bn with the remaining £11.4 coming from Swindon.

Financial and insurance activities are the most significant sector contributor to the Swindon economy with over a quarter (26%) of Swindon's GVA resulting from activity in this sector. This is followed by manufacturing at 10%. Importantly both of these sectors are prominent in the UK government's industrial strategy and therefore will be of significant focus and importance in the national growth agenda. Swindon should capitalise on its existing strengths and their alignment with central government funding to capture investment opportunities and sector growth.

Swindon remains a productive area compared to the national position with output per hour worked in Swindon at £55 compared to £40, productivity growth has also been strong in Swindon. Strong productivity will allow for improved living standards and has the propensity to create greater appeal for investment coming into the area.

Examining GVA through a sector lens, Wiltshire's economy is diverse, with no sector (bar real estate activities) accounting for more than 15% of economic output. A diverse economy will give the local authority a high level of resilience to economic shocks.

Considering productivity, Wiltshire has a lower level of output per hour worked, £39 versus £40 in England. Though there has been very strong growth in Wiltshire's output per hour worked. This will support growth in living standards and if growth continues at this rate, the productivity gap in Wiltshire will diminish, and potentially close in the near future.



Economy – Policy Implications

Business Base

The business survival rate in Swindon and Wiltshire presents a mixed picture. While it exceeds the national average, it lags behind the South West average, with Swindon facing particular challenges. At just 37%, Swindon has the lowest survival rate among comparator areas, highlighting difficulties in sustaining businesses. Coupled with declining business birth rates, this suggests barriers to both business creation and longevity—potentially due to limited access to finance, skills shortages, or a challenging trading environment. Addressing these constraints through targeted interventions will be essential to fostering a stronger entrepreneurial ecosystem.

Both areas benefit from sector strengths in logistics and distribution, offering growth opportunities but also raising concerns around planning constraints, sustainability, and workforce demands. As automation and AI continue to reshape these industries, policies must focus on future-proofing the sector while ensuring accessible pathways for workforce reskilling and upskilling. Similarly, professional and technical services are expanding, yet persistent recruitment challenges for higher-skilled roles point to the need for stronger collaboration between businesses, education providers, and training institutions to build a resilient local talent pipeline.

Regarding priority sectors, both Swindon and Wiltshire demonstrate relatively strong business specialisation, with Wiltshire in particular maintaining or nearing specialisation across all priority sectors. However, business base trends indicate a contraction in most priority sectors, raising concerns about long-term sector growth. While the data (covering 2019–2022) reflects the economic challenges of the COVID-19 period, further examination of the main sectors of focus will be necessary to shape effective policy interventions moving forward.



Economy – Policy Implications

Employment

Declining job density, which now suggests there were only enough jobs to provide work for 83% of working-age residents, coupled with shrinking employment and business bases, indicates limited employment opportunities in the area. Swindon has seen a steep decline in employment with a 5% decrease between 2018 and 2023, equating to a loss of 6,000 jobs. This contrasts with Wiltshire, which experienced a 1% increase over the same period.

While some sectors have seen employment expand, such as construction and transport and storage, significant job losses in manufacturing, wholesale, and financial and insurance services have contributed to Swindon's employment challenges. The closure of the Honda plant in 2021, which employed 3,500 people, was a major factor in the contraction of Swindon's manufacturing base. Meanwhile, the financial and insurance sector, a key employer in Swindon, saw a 9% drop in employment, in stark contrast to 5% growth nationally.

Although the financial and insurance sector's GVA increased by 19% between 2019 and 2022, employment in the sector declined by 9%, in stark contrast to the 5% growth observed nationally. This suggests that increased productivity and higher-value activities have allowed the sector to generate greater output despite employing fewer businesses and workers.

This suggests a need for targeted policy intervention to boost job creation, particularly in Swindon, where employment continues to decline. Addressing these challenges will require a focus on attracting new businesses, supporting sectoral diversification, and ensuring that employment opportunities align with the skills and needs of the local workforce.



5. People



People – Summary Findings



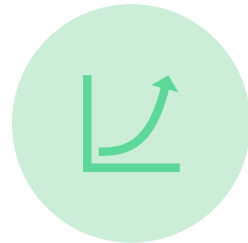
Population growth – The total population of Swindon and Wiltshire has increased over the past five years by **4%**, and the over 65's population in the area is high, especially in Wiltshire.



A strong labour market – Swindon and Wiltshire's employment rate is increasing, while the economic inactivity rate is relatively low (**17%**). Unemployment has also been decreasing over the past five years. Workers are also more likely to enter high-skilled employment.



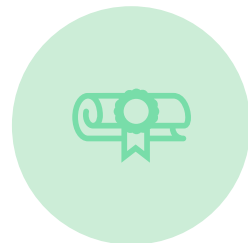
Key Industries – In Swindon and Wiltshire, employment is highest in the public admin, education and health sector (**37%**) and Banking, finance and insurance activity sector (**18%**).



Rising Claimant Count – since 2022, the claimant count in Swindon and Wiltshire has risen by **19%**. However, this increase is in line with the national average.



Earning disparities – **Residents** of Swindon and Wiltshire have a higher annual salary than those who **work** within Swindon and Wiltshire. The gender pay gap is also significantly **higher than average**, despite unemployment rates for women being low. People living in Swindon and Wiltshire have less disposable income than the national average.



Challenges for social mobility – Less students in Swindon and Wiltshire continue into higher education (36%) with more students entering education in Wiltshire (38%) than Swindon (33%) relative to the national position (**45%**). Social mobility indicators suggest there is room improvement for young adults entering the workforce. This may be a result of a lack of HE institution in either Swindon or Wiltshire.

People – Demographic Characteristics

Around 756,000 people live in Swindon and Wiltshire, of which 32% live in Swindon compared to 68% in Wiltshire.

Both areas have a similar age profile, however Swindon has a larger proportion of 0–15-year-olds (20%) and 16–64-year-olds (61%) than Wiltshire, which has a higher over 65's population (23%) than Swindon and the national average.

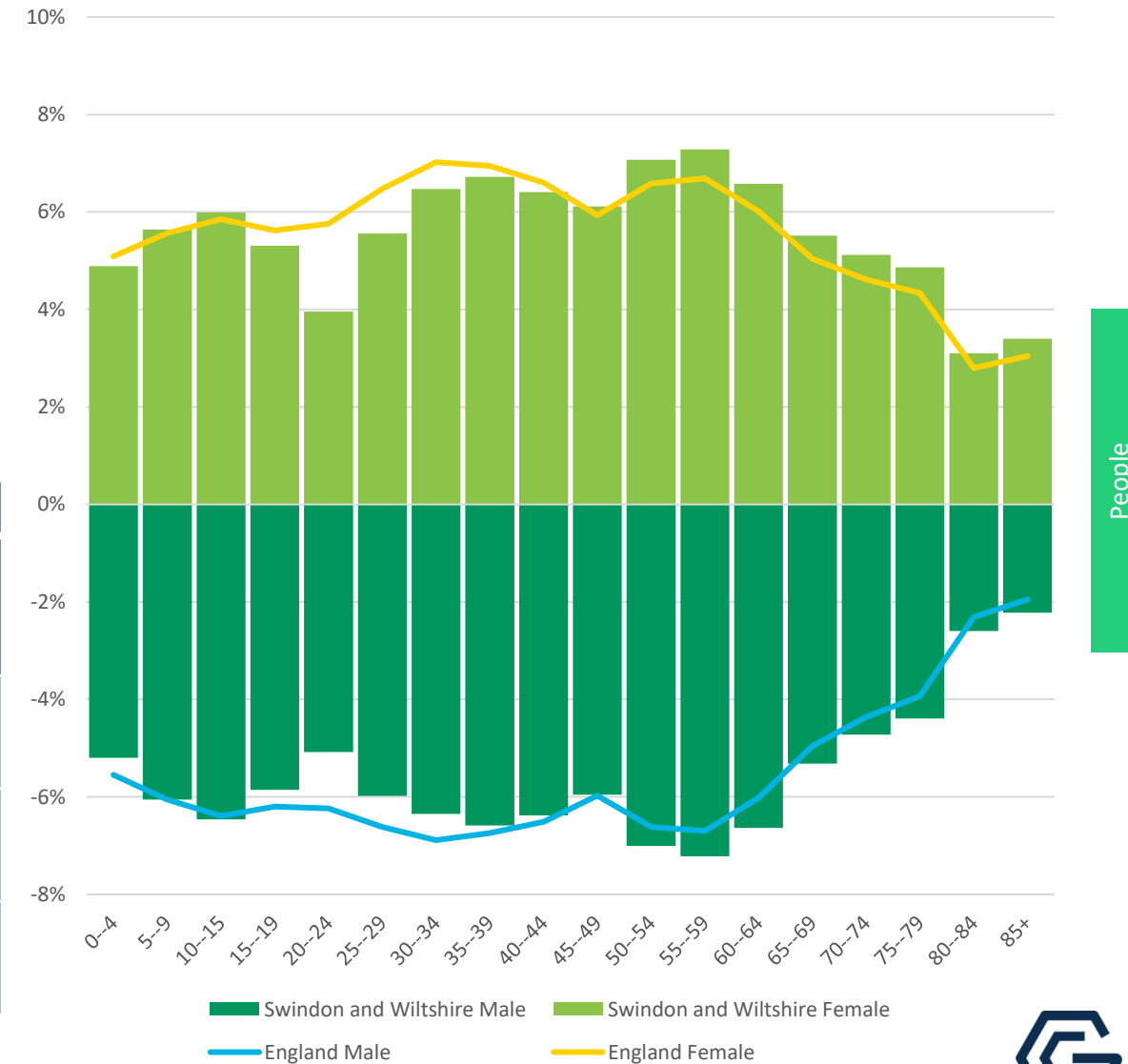
As a proportion of the working age population, there is a 50/50 split in males and females, which is in line with the national average. Gender distribution for each age group is roughly the same in Swindon and Wiltshire, however nationally there is a slightly larger proportion of females within the over 65 age group.

There tends to be a lower working age population as a proportion of the total population across the three growth zones, with 59% of Swindon M4 population of working age, 56% in A350 and 55% in Salisbury A303.

				Growth Zones			
Population 2023	Swindon and Wiltshire	Swindon	Wiltshire	A350	Salisbury A303	Swindon M4	England
Total	756,396	238,417	517,979	168,339	89,582	306,383	57,690,323
16-64 (no.)	461,602	152,231	309,371	94,789	49,465	181,527	36,258,886
16-64 (%)	61%	64%	60%	56%	55%	59%	63%

Source: ONS Mid-Year Population Estimates, 2023

Age Profile, 2023



People – Population and Demographic Change

Over the past 5 years, Swindon and Wiltshire's population has grown by 4% (+27,500 people) which is above the national average (3%).

The number of residents aged 0-15 has stayed around the same in the past 5 years (a growth rate of 1%, or an additional 926 people), which is in line with the national average (also 1%).

The number of working-age adults in Swindon and Wiltshire has only grown by 2% (2,950 people) compared to 3% nationally. With an already below average working age population in Swindon and Wiltshire, this could have direct implications for future economic growth, as businesses investment decisions are influenced by workforce availability.

There has been a boom in the over 65's population in the past 5 years, by 11% (15,460 people), significantly higher than the national average of 7%. If this rate of change continues alongside the small growth in the working age population, this will create pressure for Swindon and Wiltshire's workforce, as the amount of people leaving the workforce is greater than the amount of people entering it.

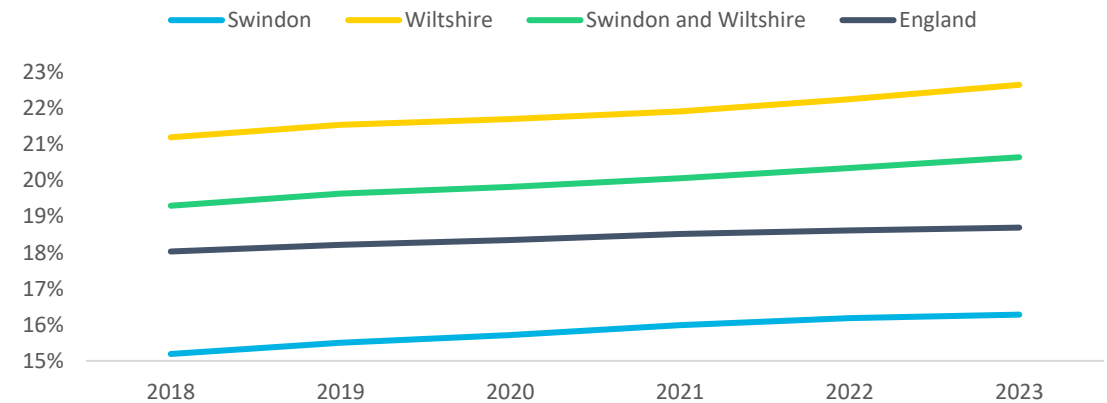
Looking at historic data, it can be seen that this growth has been driven largely by an increase in over 65's and a decrease in working aged people, especially in Wiltshire. This suggests that population growth has been mostly due to the natural ageing of the population, rather than an in-migration of retirees.

Source: ONS Mid-Year Population Estimates, 2023

Population Growth 2018-2023



% Over 65's, 2018-2023



People – Population and Demographic Change

Swindon has a diverse ethnic composition, with a high share of Non-British and Non-EU born residents whereas Wiltshire has a very low share compared to the national benchmark

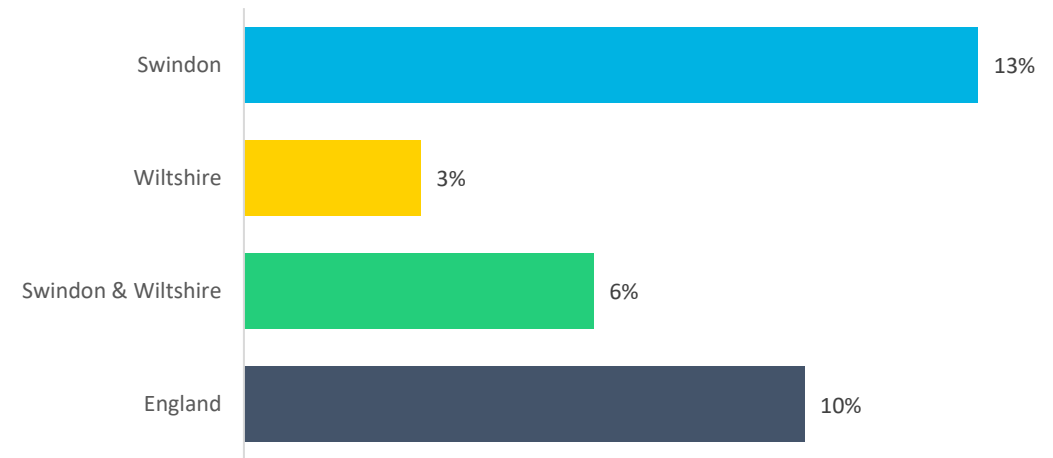
In 2021, there were 43,000 non-British born residents in Swindon and Wiltshire (6% of the total population). Of these, 28,000 resided in Swindon and 15,000 resided in Wiltshire. This means that over one in twenty residents were born overseas.

Swindon has a significantly higher proportion of non-British born residents, with 13% of the population being non-British born, compared to only 3% in Wiltshire. Nationally, one in ten residents are non-UK born. This could suggest that while Swindon is an ethnically diverse area in terms of migrants, Wiltshire is not.

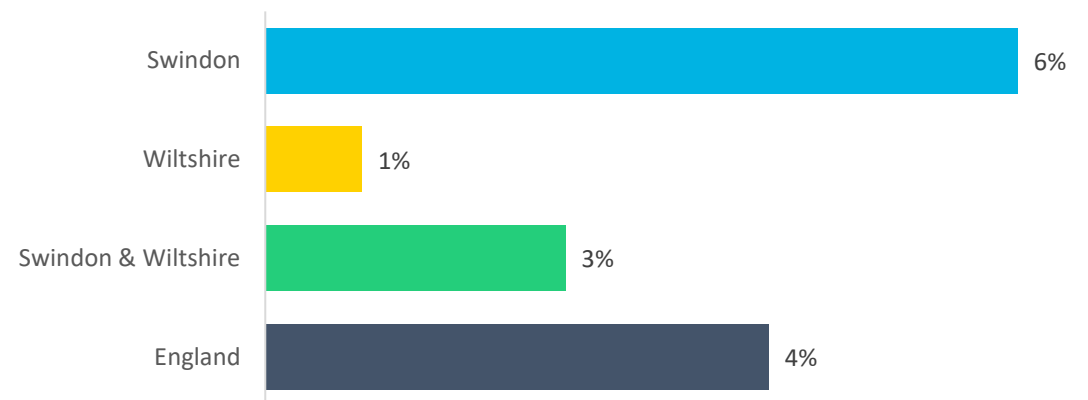
Non-EU born residents made up 18,000 of all residents, accounting for 3% of all residents in Swindon and Wiltshire. A similar proportion were born outside of Britain but in the EU, which accounted for 25,000 residents. The proportion of EU born, non-British born, and non-EU born immigrants in the combined Swindon and Wiltshire area is lower than the national average.

Ethnic diversity and migration can be harnessed as a driver of economic growth, supporting entrepreneurialism, culture and vitality, and employment.

% of Non-British Population by country of birth, 2021



% of Non-EU Population by country of birth, 2021



ONS Population by Country of Birth, June 2021

People – Labour Market Characteristics

Four in Five people living in the Swindon and Wiltshire area are considered “economically active”.

The majority of working age adults are participating in the local labour market in some way. The economic activity rate at 84% is higher than the national average (79%) and has been steadily increasing since 2020, whereas England’s economic activity rate has been static for the past 4 years.

In some of the areas, including Swindon, there was a dip in economic activity from 2020-2022.

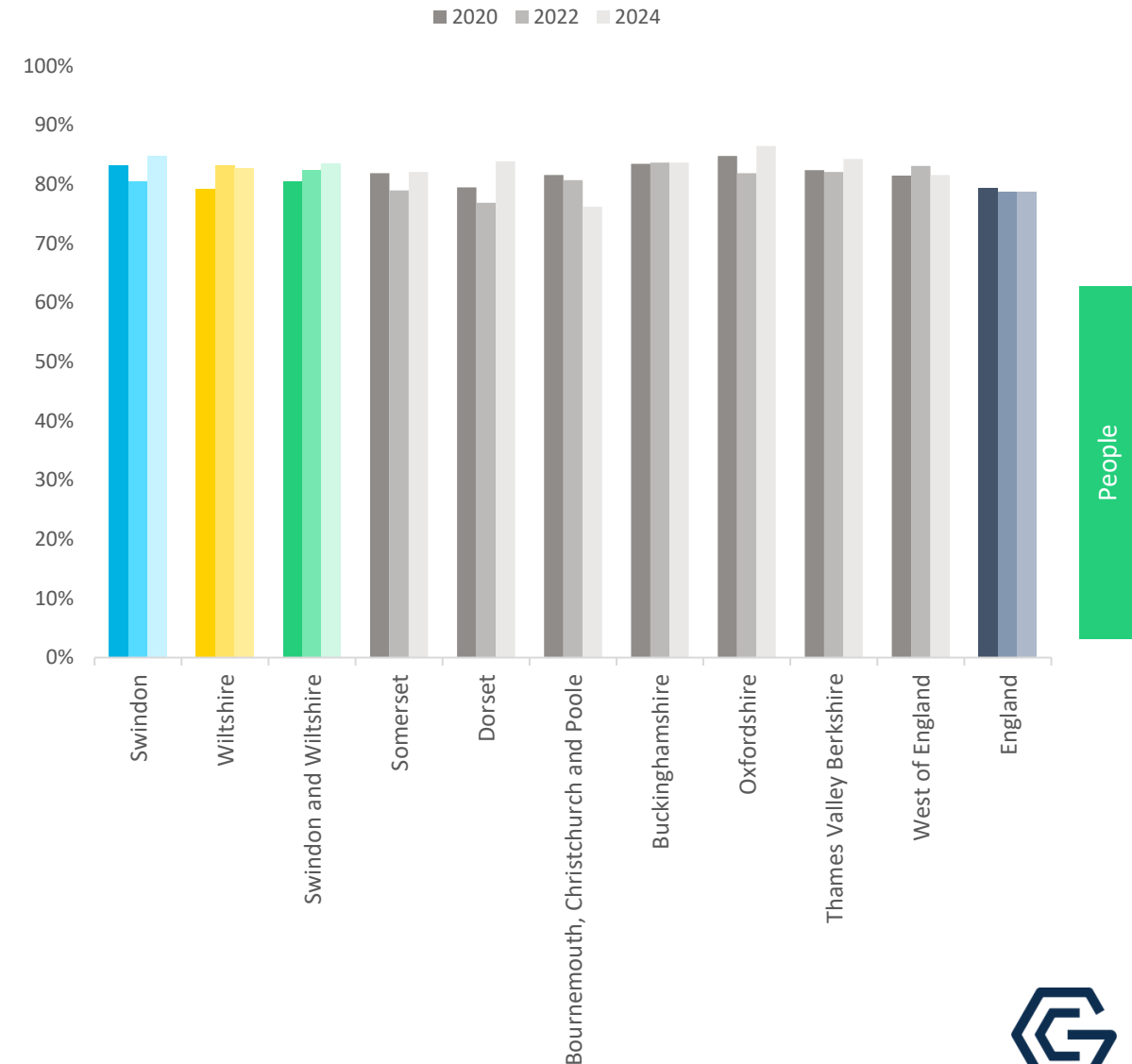
Only 2% of Swindon and Wiltshire’s economically active population are unemployed, much lower than the national average of 4%. This is a good indication of a strong demand for labour in Swindon and Wiltshire. However, this points to tight labour market conditions and local businesses may struggle to meet their labour needs from the Swindon and Wiltshire labour pool.

Adding to this, although Swindon and Wiltshire’s economic activity rate is higher than the national average, it is below other nearby areas, particularly Oxfordshire, which has an economic activity rate of 87%, and Thames Valley at 84% with the latter in line with Swindon and Wiltshire's rate.

Number of People Economically Active, 2024



Proportion of working age population economically active, 2020-2024



People

Source: Annual Population Survey, ONS, 2024

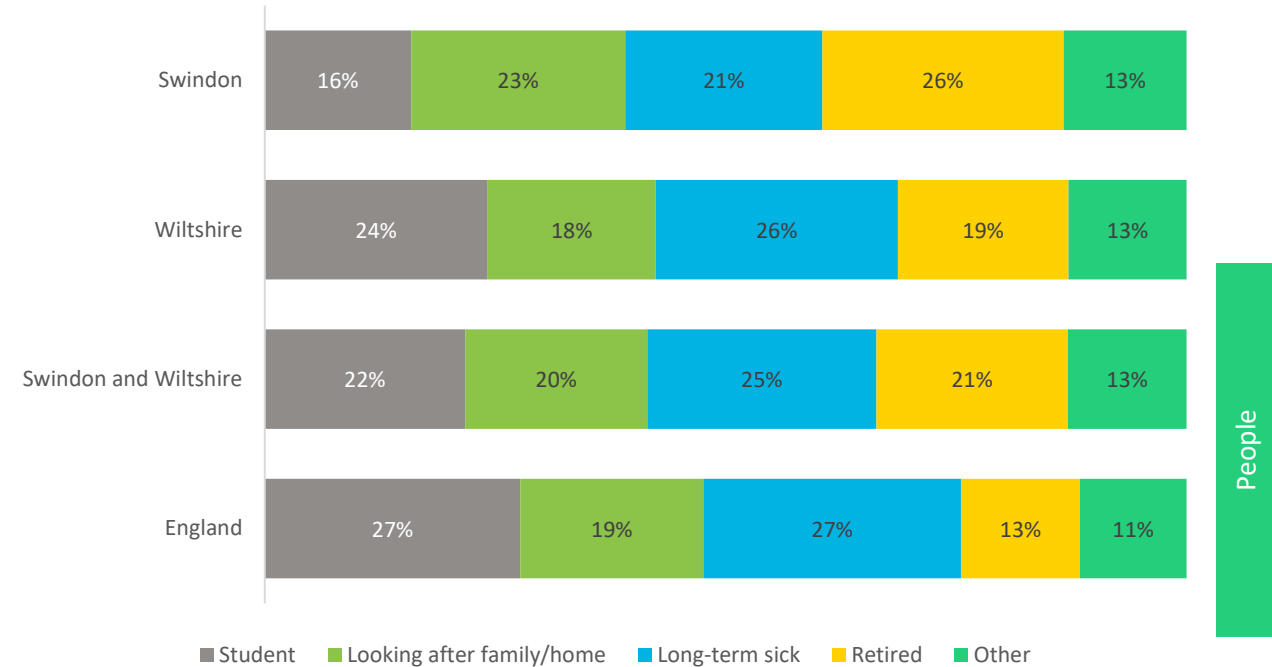
People – Labour Market Characteristics

Although Swindon and Wiltshire has a low economic inactivity rate, less economically inactive people want a job now than in 2019 (18% compared to 25%)...

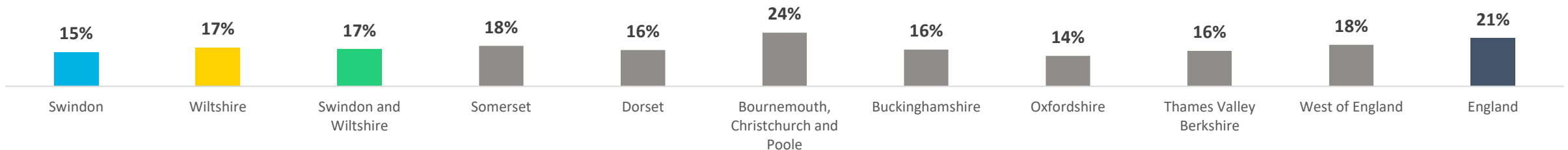
The definition of 'economic inactivity' is narrow, and it includes those who are either unemployed or out of work but have actively sought out work in the previous four weeks and are available to start in the next two weeks. It can be thought of as the immediate labour supply but doesn't include those that may still want to engage in the labour market but are unable to do so. There are 79,900 people aged 16-64 in Swindon and Wiltshire (17%) who are considered economically inactive. When compared to surrounding areas and the national average, this level of inactivity is low.

Of those who are economically inactive, just over a fifth are students, and as such will only be economically inactive in a transient sense. However, a fifth are also retired, which is significantly higher than the national average (13%). This presents challenges of encouraging people to stay in the workforce for longer or encouraging people to contribute to the economy in other meaningful ways, such as volunteering. Data from the Annual Population Survey suggests that 18% of people who are economically inactive in Swindon and Wiltshire do want a job (13,200 people), which is broadly in line with the national average.

Reasons for economic inactivity, 2024



Economically Inactive as a proportion of working age population, 2024



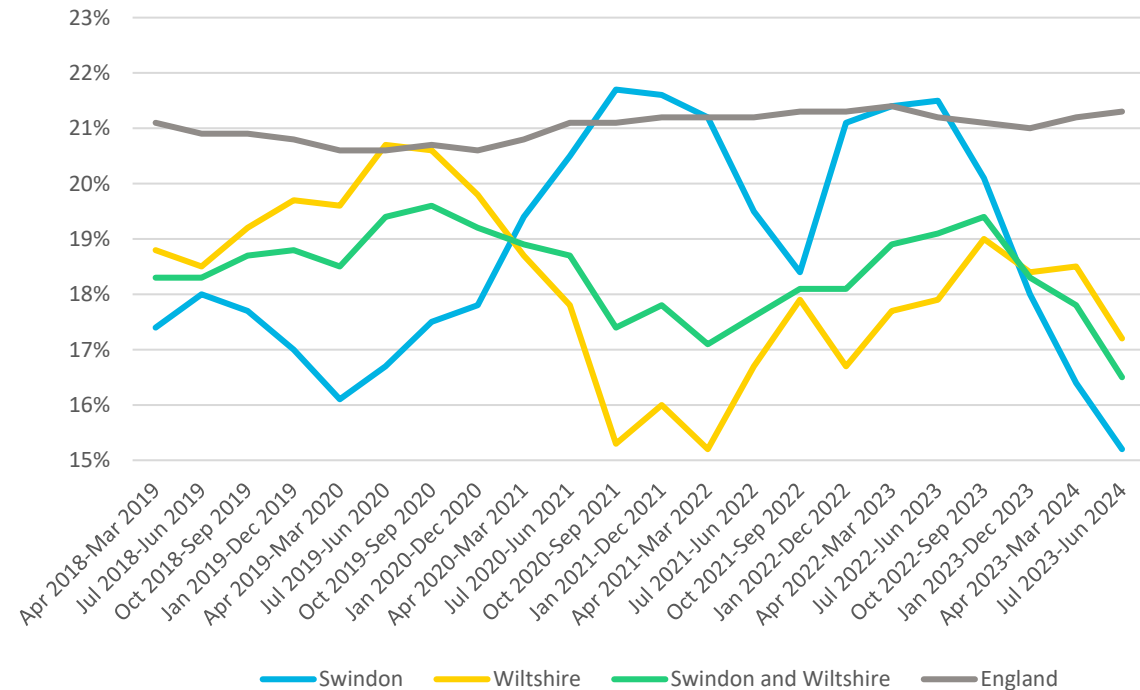
Source: Annual Population Survey, 2024

People – Labour Market Characteristics

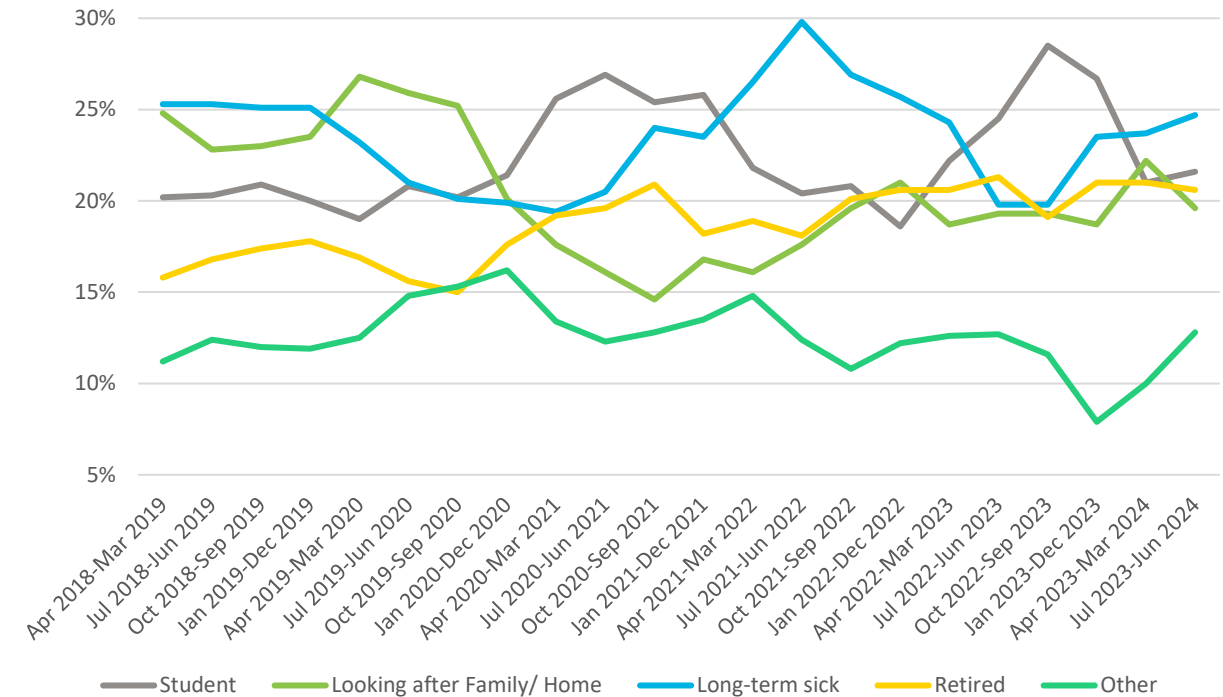
Since 2019, economic inactivity in Swindon and Wiltshire has decreased by 2.2 percentage points whereas the national figure has stayed roughly the same.

There was a brief increase in inactivity between March 2020- July 2021 (likely due to the impacts of the pandemic). Inactivity rates have been rapidly decreasing since September 2023, especially Swindon, which dropped from 21.5% to 15% in the space of a year. This could be due to the decrease in long-term sickness (from 23.8% to 21%), and the decrease in students (from 27.1% to 17%). In Swindon and Wiltshire, the number of people claiming long term sickness rose in the 3rd quarter of 2022 rose to 30% and then decreased by the 3rd quarter of 2023. The number of people looking after family has also decreased in the past five years, from 24.8% to 19.6%. Retirement as a reason for inactivity is also on the rise in the area, increasing from 15.8% in 2019 to 20.6% in 2024.

Change in Economic Inactivity 2019-2024



Reasons for economic inactivity, 2019-2024



Source: Annual Population Survey, 2024

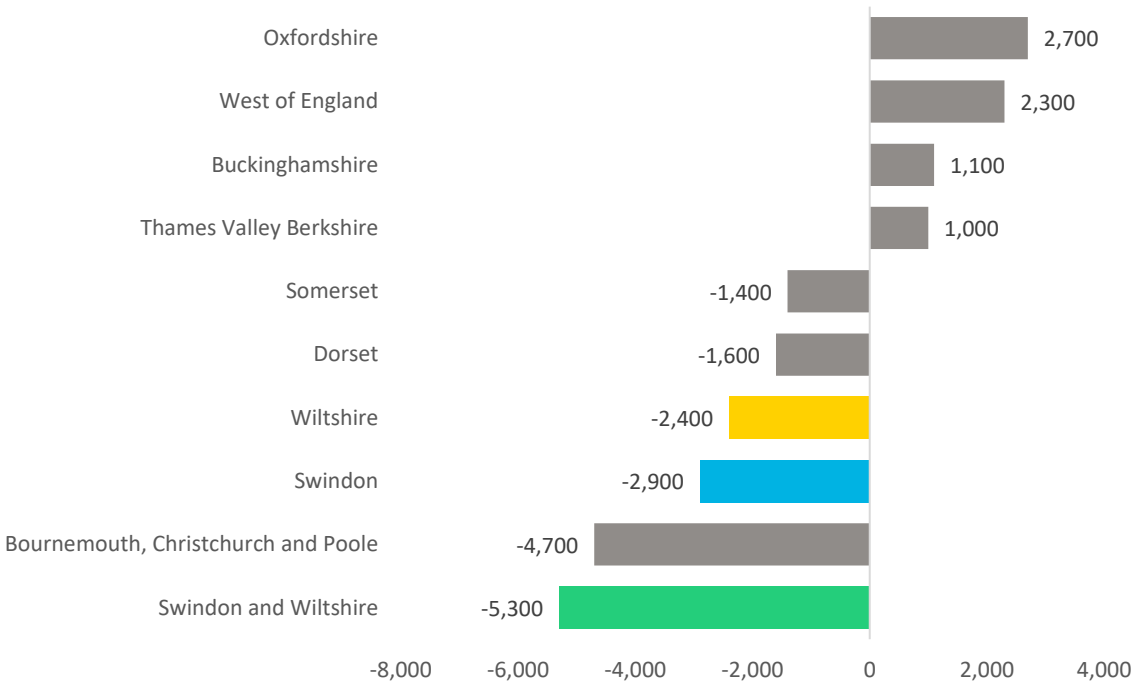
*"Other reasons include people who (i) are waiting the results of a job application, (ii) have not yet started looking for work, (iii) do not need or want employment, (iv) have given an uncategorised reason for being economically inactive, or (v) have not given a reason for being economically inactive." - ONS

People – Labour Market Characteristics

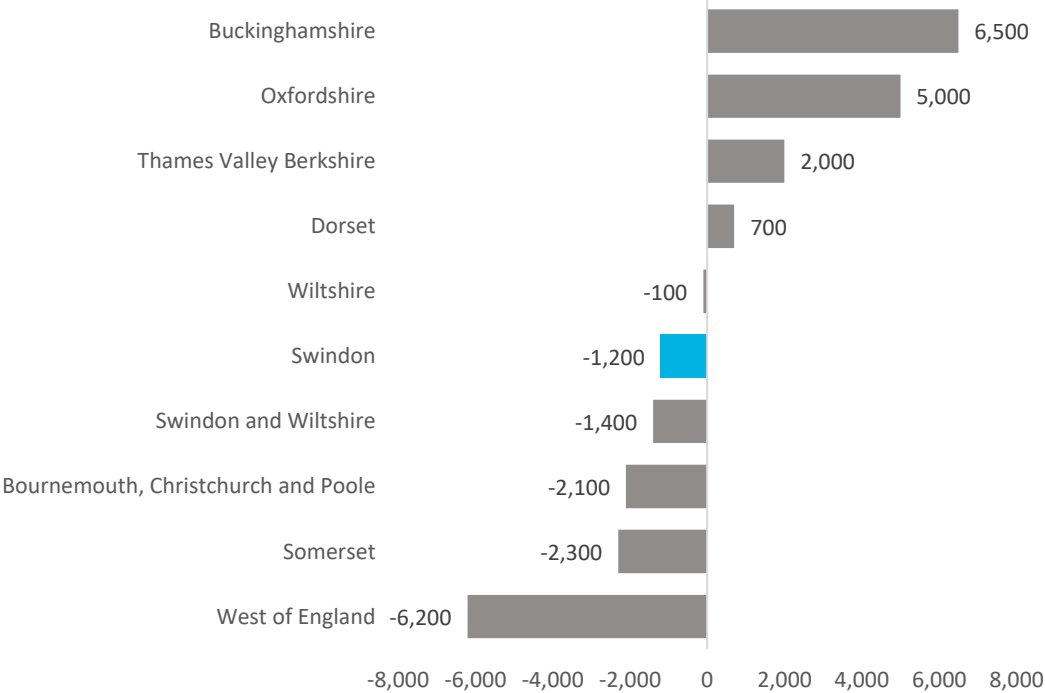
Swindon and Wiltshire has a low rate of unemployment relative to benchmarks and has seen a continued reduction in the number of people unemployed since 2022.

As of June 2024, there were 8,700 people classed as unemployed in the Swindon and Wiltshire. Of this, 37% were derived from Swindon compared to 63% in Wiltshire. This gives Swindon and Wiltshire a combined unemployment rate of 2.3% (2.6% and 2.1% respectively) which is significantly below comparators such as Thames Valley LEP (3.6%), Buckinghamshire (4.5%) and the national average (3.8%). Between 2022 and 2024, Swindon and Wiltshire experienced the second largest decrease in unemployment (a 38% decrease from 10,100 to 8,700). This suggests positive signs of recovery following the COVID-19 pandemic.

Change in Unemployment 2022-2024



Change in Unemployment 2019-2024



People

Source: Annual Population Survey, 2024

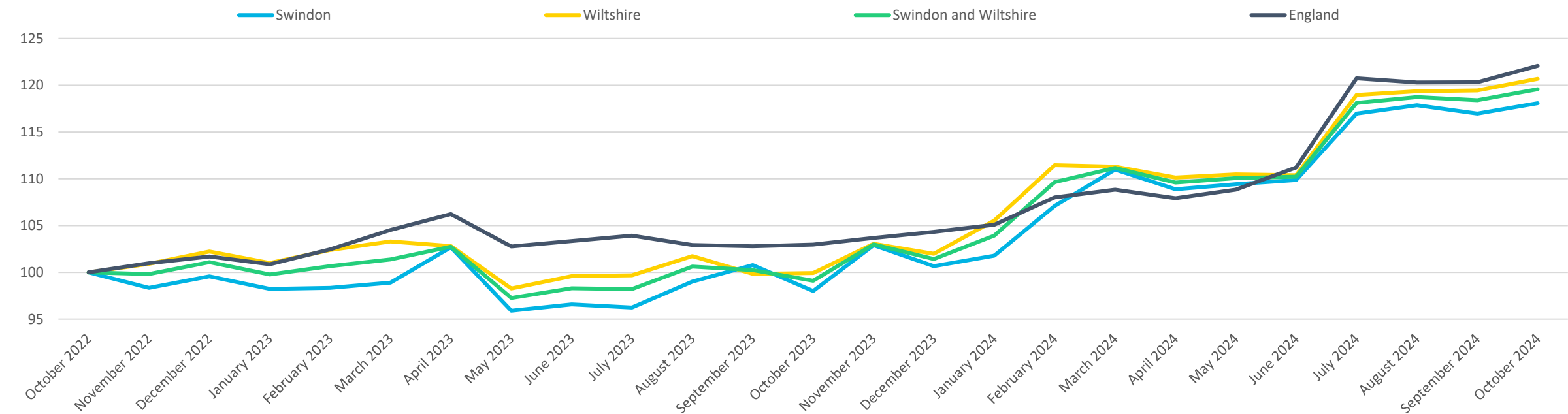
People – Labour Market Characteristics

The number of claimants has been steadily rising in the past year...

Claimant count is a measure of the number of people claiming benefits principally for the reason of being unemployed, based on administrative data from the benefits system. Whilst there is a large overlap between the unemployed and claimants, there are some important differences. For example, claimant count includes a small proportion of people who may be in work but on very low income. Despite unemployment rates going down, there were an additional 2,070 claimants in Swindon and Wiltshire in October 2024 (12,650) compared to October 2022 (10,580). The majority of claimants in the area are from Wiltshire (58%) compared to Swindon (42%). The increase in claimants since October 2022 (19.5%) has been largely below the rate experienced in comparator areas, such as Thames Valley (30%), Buckinghamshire (25%) and the national average (22%).

The increase in claimants in 2024 is likely an expression of increasingly precarious economic circumstances following the pandemic, a rising cost of living and doing business and general global economic uncertainty creating a less buoyant labour market.

Indexed growth in claimants, 2022-2024, 2022=100



Source: ONS Claimant Count, 2024

People – Labour Market Characteristics

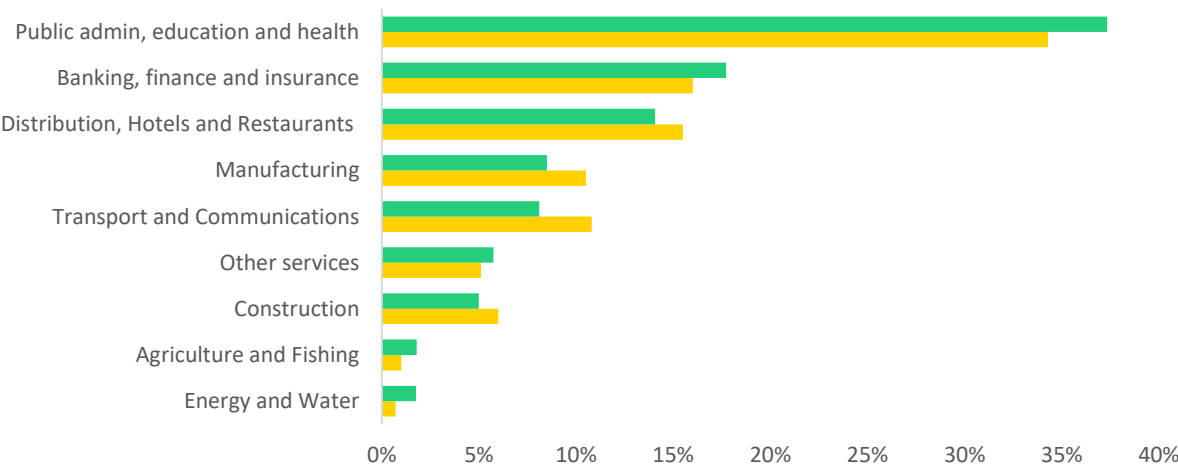
In June 2024 there were 356,800 residents in employment in Swindon and Wiltshire...

This equates to an employment rate of 81.7% in the area, significantly higher than the national average (75.7%). However, there are slight differences in the two local authorities, with Swindon having a higher employment rate than Wiltshire (82.5% and 81.3%) respectively. Foundational services and professional services dominate resident employment. The largest sector has been public admin, education and health sector (37%). This sector has also seen a significant amount of growth (3pp. since 2022). Professional employment is also growing, with Banking, finance and insurance activities in second position (18%, an increase of 2pp. from 2022).

Just over a quarter (26%) of employment in Swindon and Wiltshire is in the public sector which is over-represented relative to England (23%). More people work in the private sector in Swindon (78%) compared to Wiltshire (71%). Wiltshire has less people employed in the private sector than most of the comparator areas, with the exception of Oxfordshire (69%). A tenth of employed residents in Swindon and Wiltshire are self employed (41,800). This is broadly in line with the national average, but lower than comparator areas- for example, one fifth of Dorset's employment is classed as self-employment.

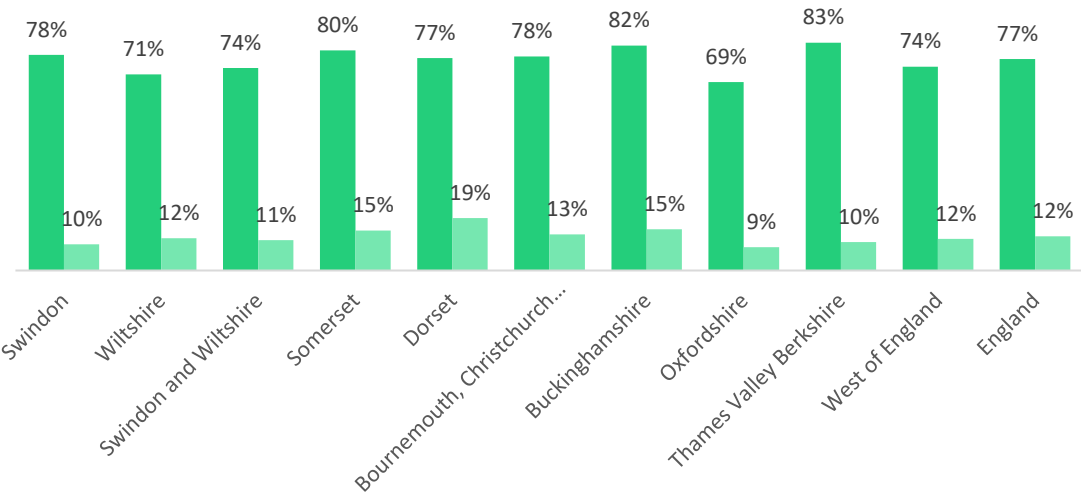
Resident-Based Employment by Sector, Swindon and Wiltshire

2023/2024 2022/2023



Private Sector Employment and Self Employment, 2024

% Private Sector Employment % Self employed



Source: Annual Population Survey, 2024

People – Labour Market Characteristics

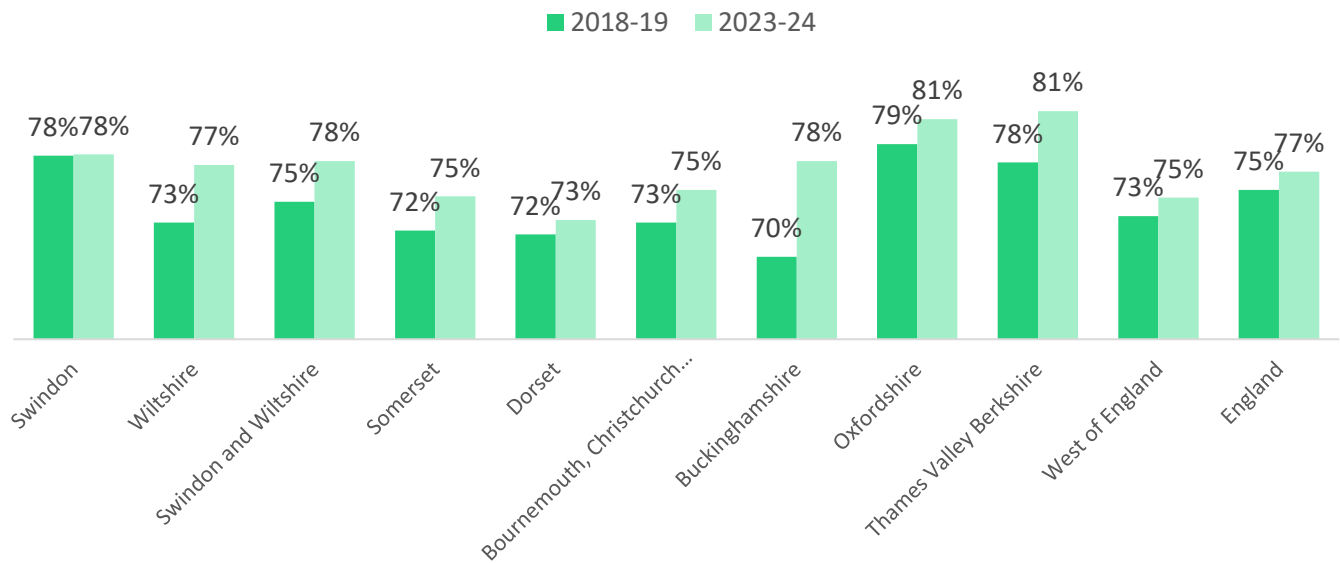
78% of residents in employment in Swindon and Wiltshire are employed full time, accounting for 277,000 jobs.

This rate is slightly higher than the national average (77%). All areas, except Swindon, have seen substantial growth in full time employment in the past 5 years, especially Wiltshire, which grew by 4%, and Buckinghamshire, which grew by 8%.

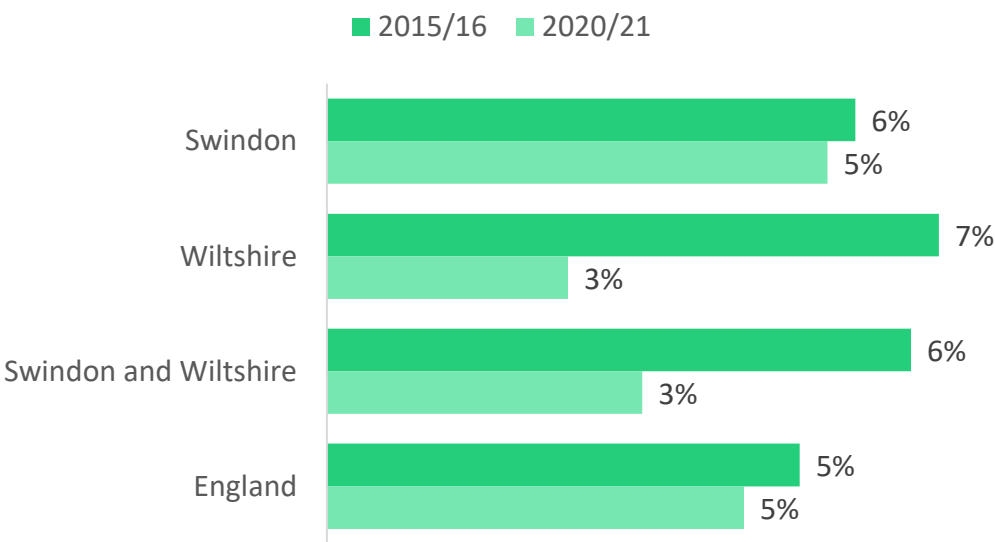
In addition to full time employment, it is also important to consider the role and proportion of flexible workers in the area’s labour market. The term ‘flexible workers’ in this context means people who are in ‘non-permanent’ employment. There were 22,500 flexible workers in Swindon and Wiltshire in 2021 (the last year that data was available), comprising 3.4% of the total workforce. Since 2016, flexible working rates fell by 28% (-5,200 residents in employment) in Swindon and Wiltshire.

Flexible work includes work that is temporary due to various reasons such as work being seasonal, fixed-term contracts, agency work, temping and other casual work. It should not be perceived as a positive or negative indicator of the labour market and can be a representation of labour supply fluidity whilst also being an expression of more insecure work.

Full-time employment rates, 2018/19 - 2023/24



Flexible Working Rates, 2015/16 – 2020/21



Source: Annual Population Survey, 2024

People – Labour Market Characteristics

Payrolled employee numbers have fluctuated since 2022...

HMRC provides data on people paid through the Pay As You Earn (PAYE) system where their pay is reported through the Real Time Information (RTI) system. Employees who were furloughed should still have their payments reported through this system and so feature in the data. Those who are solely self-employed are not included. As of October 2024, there were 349,912 payrolled employees. This is a slight increase of 2% since October 2022 (343,022). However, there have been some small fluctuations in that time, notably the decreases in January 2023 and January 2024.

This suggests that the number of payrolled employees is stable and has been for the past two years, with no significant changes or deviation from the national average.



Source: HMRC Pay as You Earn (PAYE) Real Time Information, 2021

People – Labour Market Characteristics

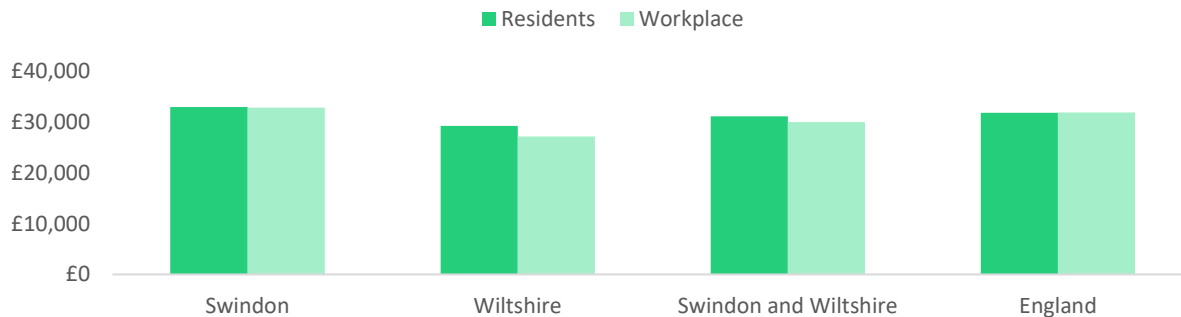
People living in Swindon and Wiltshire earn more than the people who work in the area...

People living in Swindon and Wiltshire earn, on average, £31,000 per annum which is slightly less than the national average (£31,500). Within the area, there is an earning gap, with people living in Swindon earning £3,500 more than people living in Wiltshire (£33,000 compared to £29,500).

Resident earnings in Wiltshire are 7% higher than workplace earnings, whereas resident and workplace earnings in Swindon are roughly the same (resident earnings are less than 1% higher than workplace earnings). This suggests that more people may be leaving Wiltshire to access higher value employment opportunities elsewhere whereas Swindon, a large commercial centre, offers higher paid employment for people commuting into the district.

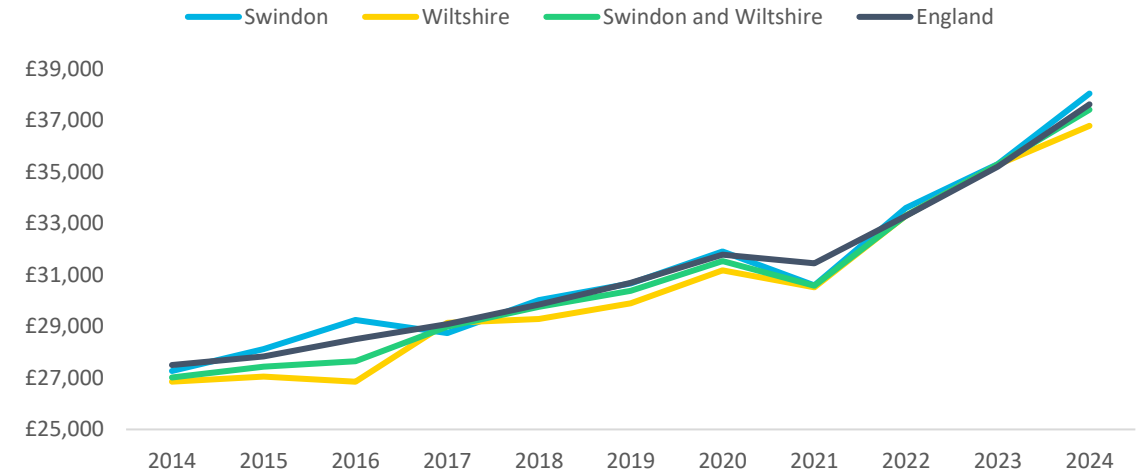
Median resident and workplace earnings in the Swindon and Wiltshire area have grown at the same rate as the national average, suggesting a strong labour market for people residing and working in the area. Swindon and Wiltshire have experienced roughly the same amount of growth in terms of annual resident earnings over the past ten years. However, in terms of workplace earnings, there is a larger disparity between the two local authorities, with Swindon experiencing more growth in workplace earnings, likely due to it being a large, urban commercial centre with more high-paid employment opportunities.

Comparison of Resident and Workplace Earnings, 2024

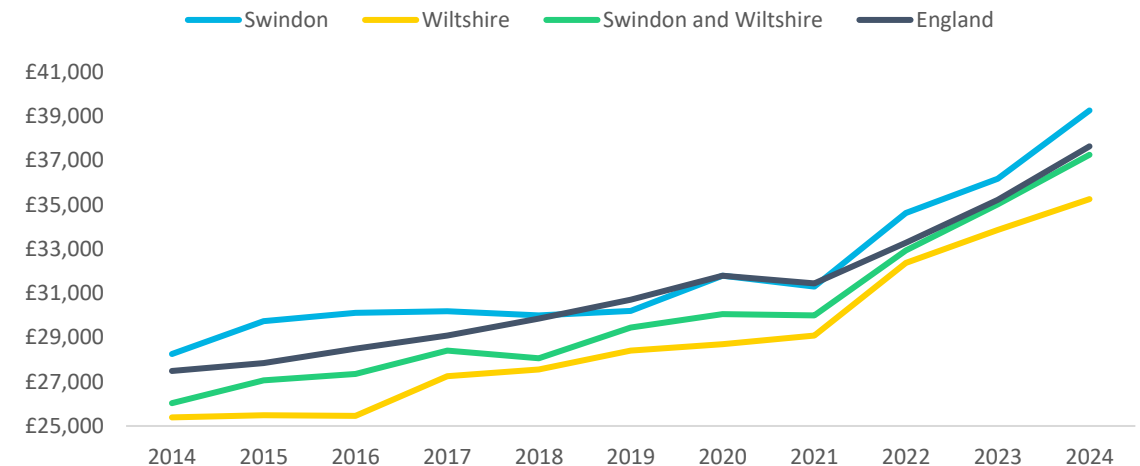


Source: Annual Survey of Hours and Earnings, 2024

Median Annual Resident Earnings, 2014-2024



Median Annual Workplace Earnings, 2014-2024



People – Skills and Education Supply

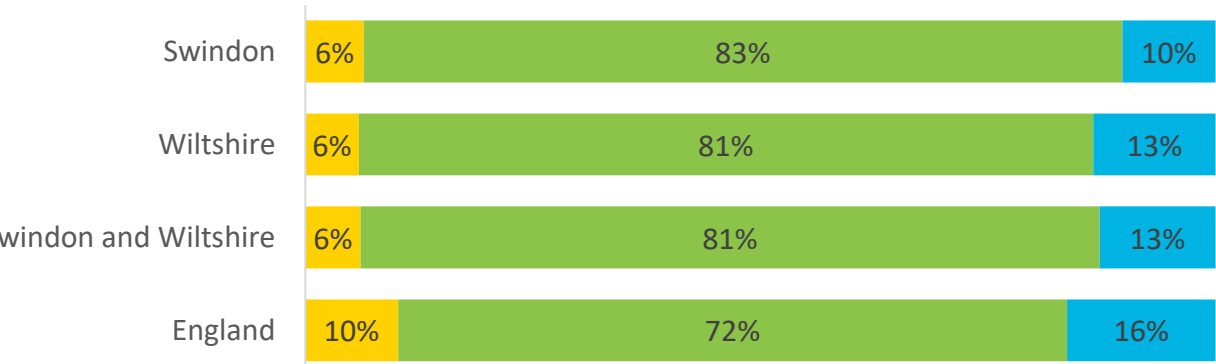
Swindon and Wiltshire have a larger proportion of schools rated ‘good’, and a smaller proportion of schools rated ‘inadequate’...

A total of 314 schools in Swindon and Wiltshire received OFSTED ratings in 2024. Over four fifths of schools were rated ‘Good’ (81%) which is significantly higher than the national average (72%). There were also a smaller portion of schools rated ‘Inadequate’ (13% compared to 16% nationally). Within Swindon and Wiltshire, more schools in Wiltshire were rated inadequate than Swindon (13% compared to 10%).However, fewer schools were rated ‘Outstanding’ in Swindon and Wiltshire than the rest of England (6% compared to 10% nationally).

Geographically, good and outstanding schools tend to be distributed evenly across the two local authorities. Though, except for two schools in Salisbury, outstanding schools are more typically found in the north of Wiltshire and in Swindon.

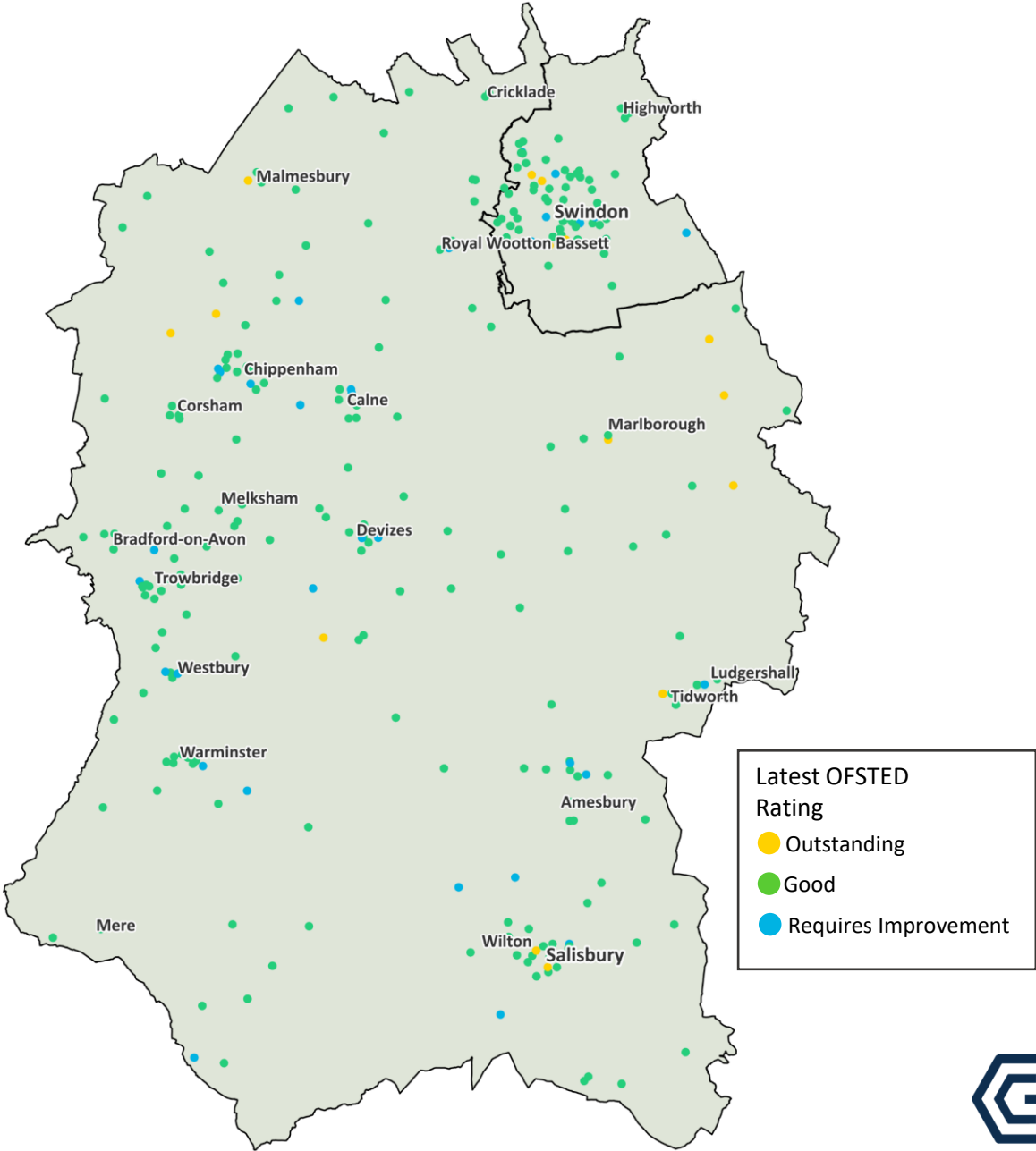
OFSTED Ratings for Schools, August 2024

■ Outstanding ■ Good ■ Requires Improvement



Source: Performance of Schools and Colleges in England, Gov.uk 2024

Primary and Secondary Schools by Last OFSTED Inspection Rating



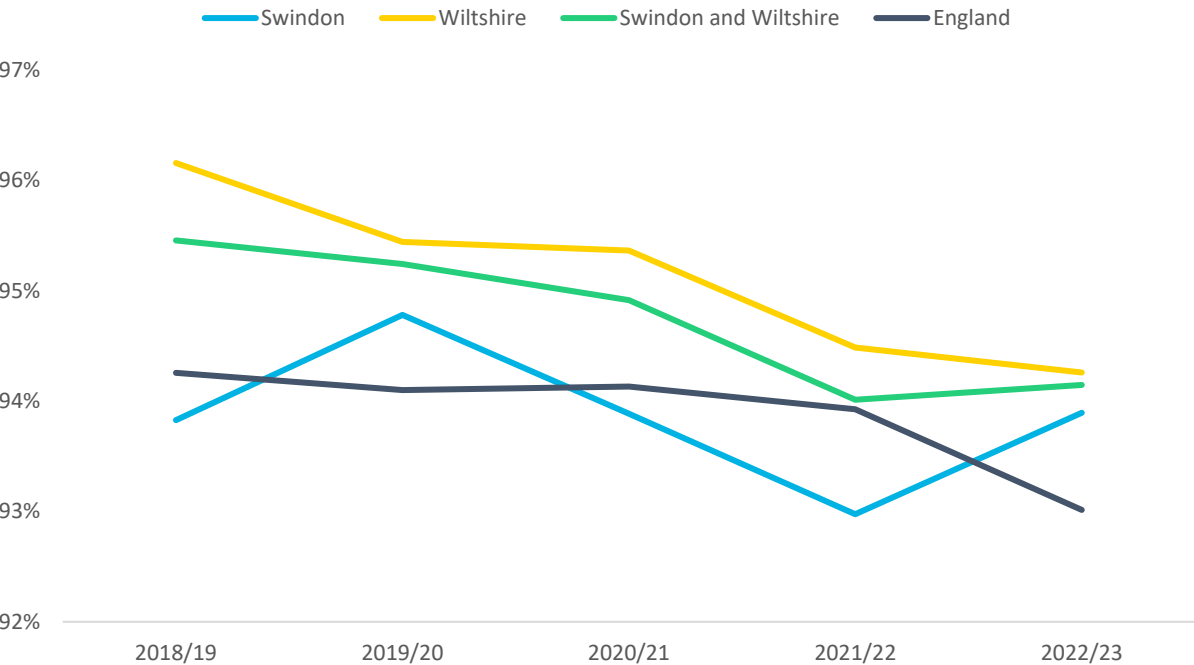
Less students are sustaining positive outcomes in Swindon and Wiltshire compared to five years ago...

Since 2018, less students in Swindon and Wiltshire are sustaining positive KS4 and positive KS5 outcomes, however during this period the national rate has also declined. In 2023, 94% of KS4 students sustained a positive outcome, compared to 95.5% in 2018. 83% of KS5 students sustained a positive outcome in 2018 compared to 80% in 2023.

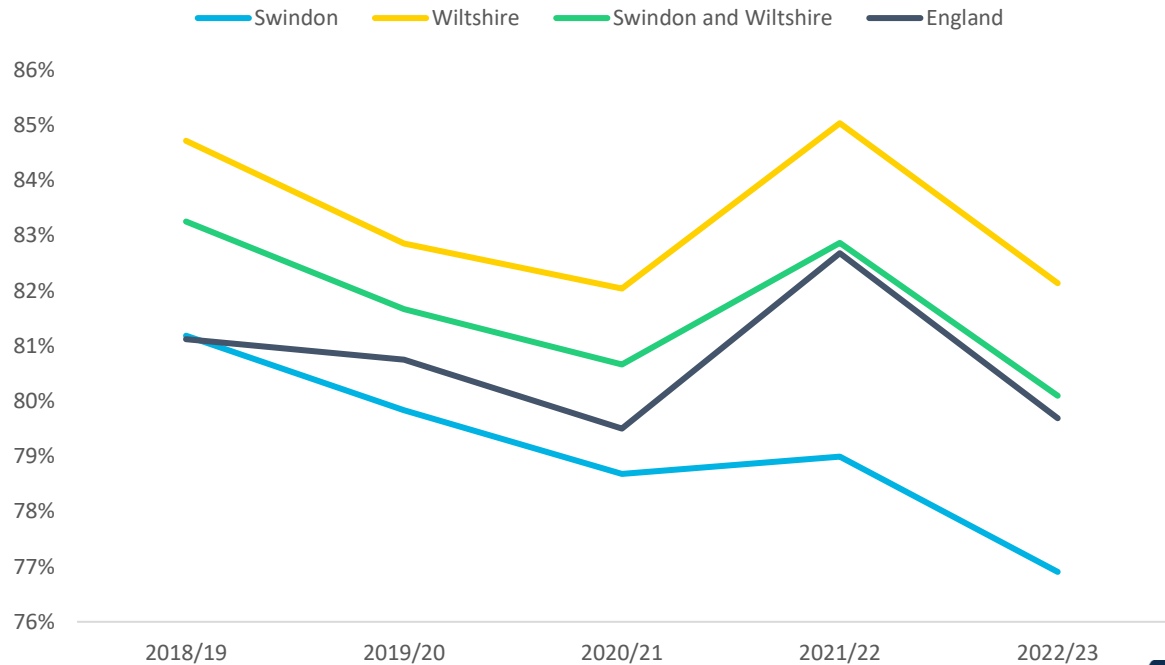
The change in positive destinations for KS5 learners is also in line with the national position. Despite peaking in 2021/22 the following year of data shows a decline, it may be a result of the COVID-19 pandemic having an impact on this graduating cohort, or likely a symptom of increasingly challenging economic circumstances.

At Key Stage 5 level however, the decline is largely driven by Swindon, which dropped from 81% in 2018 to 77% in 2023. Previous data has shown a decline in the professional, scientific and technical sector, so perhaps this decline is driven by a lack of high-skilled professional employment opportunities for Swindon’s graduates.

KS4 Positive Destination Rate, 2018-2023



KS5 Positive Destination Rate, 2018-2023



People – Skills and Education Supply

Most KS4 Pupils and 16–18-year-olds in the Swindon and Wiltshire area progressed into a positive destination...

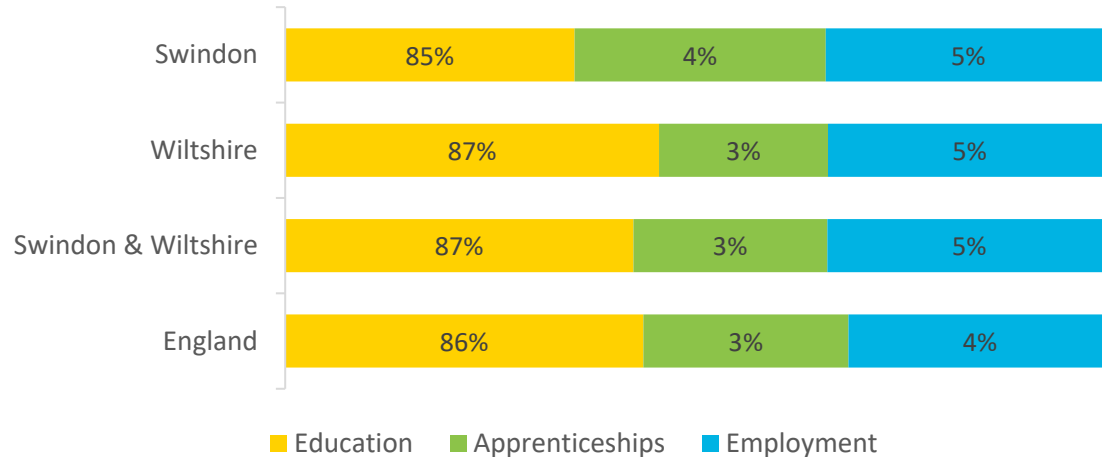
The most common KS4 destination in Swindon and Wiltshire is sustained education, with 87% of learners entering education in 2022/23. This is slightly above the national average (86%). Within Swindon and Wiltshire, more learners enter post 16 education in Wiltshire (87%) than in Swindon (85%).

Around 3% of KS4 leavers will enter apprenticeships in Swindon and Wiltshire, which is in line with the national average. There is a slightly higher proportion of learners in Swindon that enter apprenticeships (4%). Learners were more likely to enter employment than the national average (5% in Swindon and Wiltshire compared to 4% nationally).

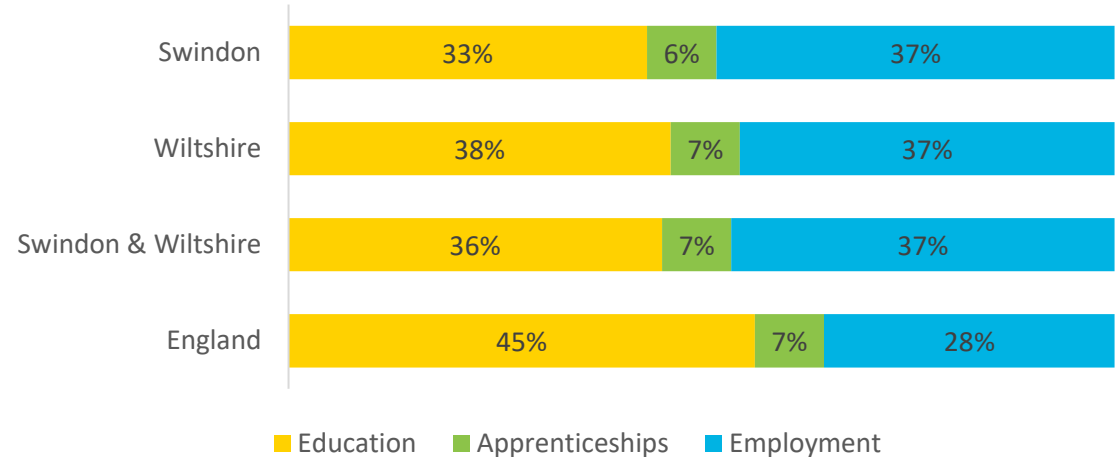
Within Swindon and Wiltshire, the most common destination for KS5 learners in 2022/23 was employment, with 37% of students entering employment. This is significantly higher than the national average (28%).

However, fewer KS5 learners are entering education compared to nationally, with 36% entering education compared to 45% nationally. This could be due to there being less post-18 colleges and universities in the area, compared to other larger cities. The rate of learners entering apprenticeships is broadly in line with the national average (7%).

KS4 Destinations 2022/23



KS5 Destinations 2022/23



Source: DfE, Further Education: Outcome based success measures 2022/23

People – Skills and Education Supply

Progression to full time employment after graduation is significantly below the national average...

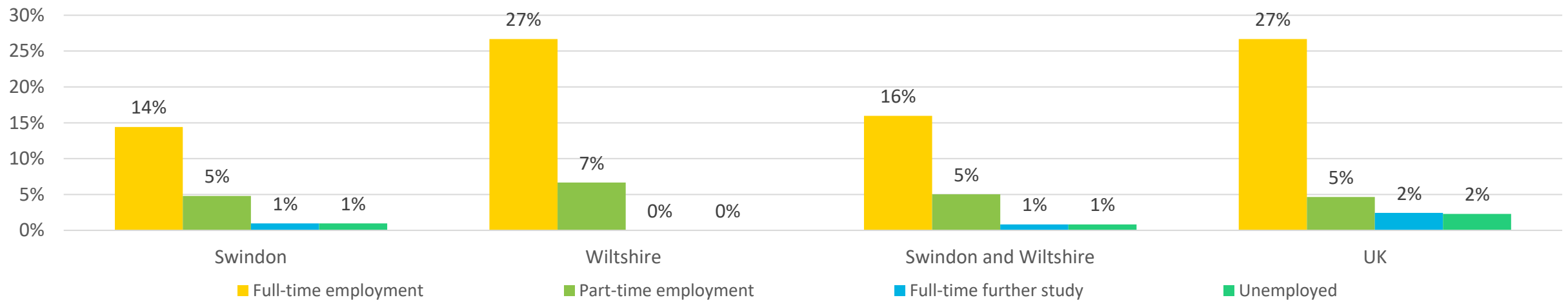
In 2021, most further education learners in Swindon and Wiltshire entered sustained employment (67%). This is significantly higher than the national average of 59%. As a result, a lower proportion of learners continue into sustained education (26%) compared to the rest of England (30%).

Within Swindon and Wiltshire, full-time employment is the most common graduate destination, with 16% of graduates who attended the region's higher education institutes entering full-time employment. Within Swindon and Wiltshire, a larger proportion of graduates in Wiltshire entered full time employment at 27%, compared to Swindon (14%). The rate in Swindon is notably lower than the national average (27%).

A number of graduates attending Swindon and Wiltshire Higher Education Institutes enter part-time employment at 5%, which is on par with the national average. This is particularly high within Wiltshire (7%), suggesting there is a pool of under-utilised graduate labour.

A lower proportion of graduates from Swindon and Wiltshire are unemployed (1%) compared to nationally (2%). However, it is worth noting that some of this difference may be due to small sample sizes and sampling variability.

Graduate Destinations 2021/22



Source: DfE, Further Education: Outcome based success measures 2020/21; HESA, Graduate Activities by provider, 2021/22

People – Skills and Education Supply

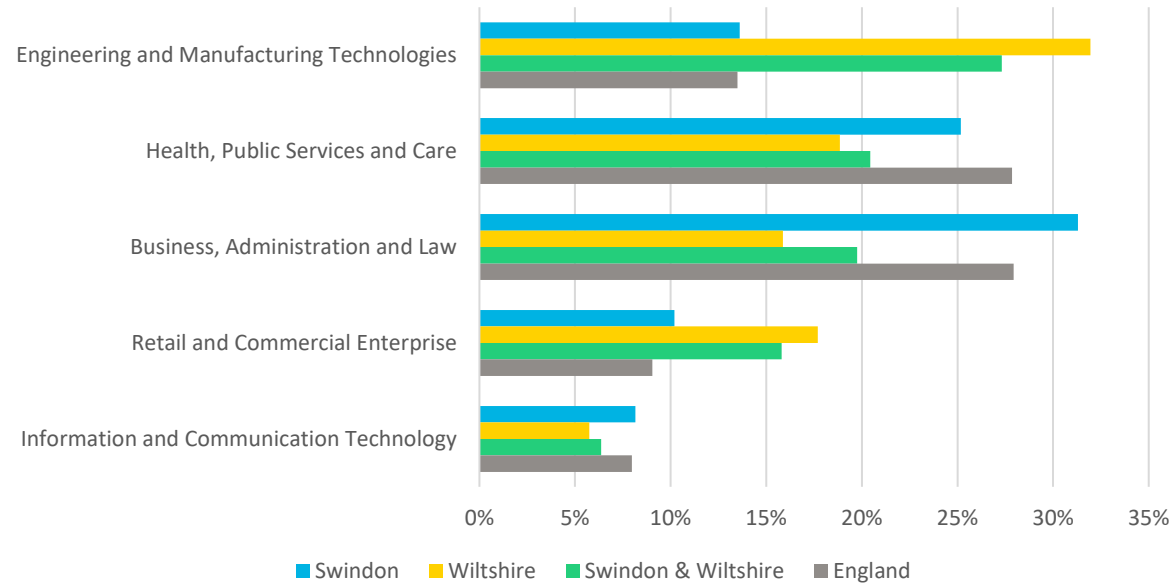
A number of employers are engaged in formal apprenticeships, however there is scope to increase this further...

Apprenticeship starts provide an insight into the appetite for technical skills and careers across different sectors. Overall, Swindon and Wiltshire had 5,820 apprenticeship starts in 2023/24 (1,470 and 4,350 respectively). Sectors with the highest apprenticeship starts included engineering and manufacturing technologies (27%), health, public services and care (20%) and business, administration and law (20%).

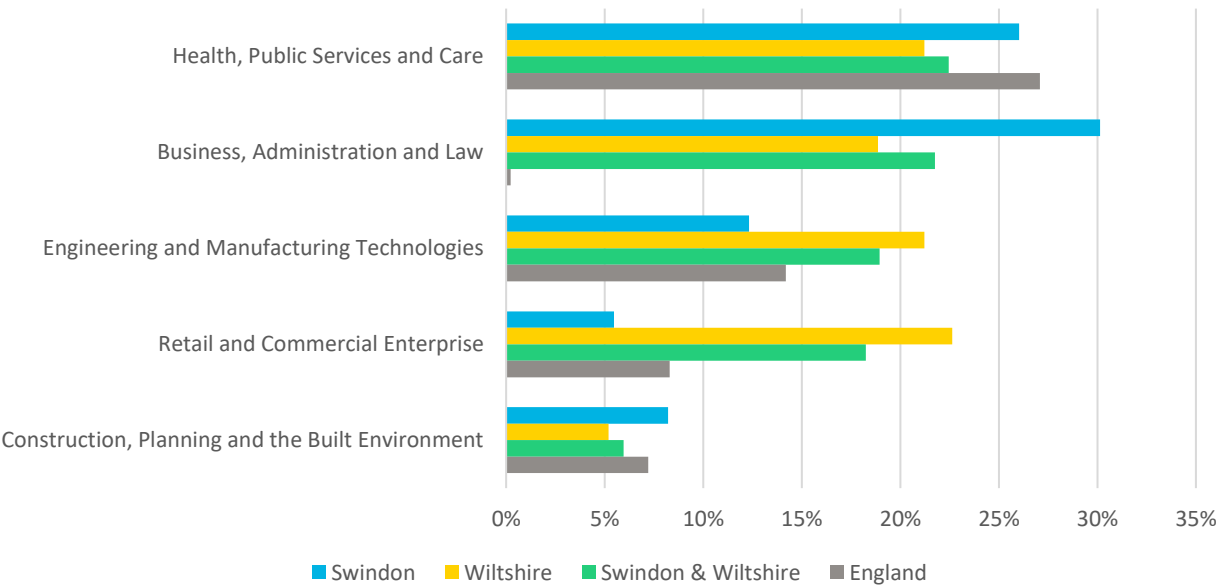
Data from the Employer Skills survey suggests 7% of employers had at least one staff member undertaking a formal apprenticeship (compared to 11% nationally). There is scope to increase the number of employers who offer apprenticeships. Of the 93% who did not offer a formal apprenticeship in the last year, 85% hadn't offered any in the last 3 years.

In 2023/24, Swindon and Wiltshire had 2,850 apprenticeship achievements. Sectors accounting for the greatest proportion of achievements included health, public services and care (22%), business, administration and law (22%) and engineering and manufacturing technologies (19%).

Top 5 Apprenticeship starts by subject area



Top 5 Apprenticeship achievements by subject area



Source: Employer Skills Survey 2022, DfE 2024

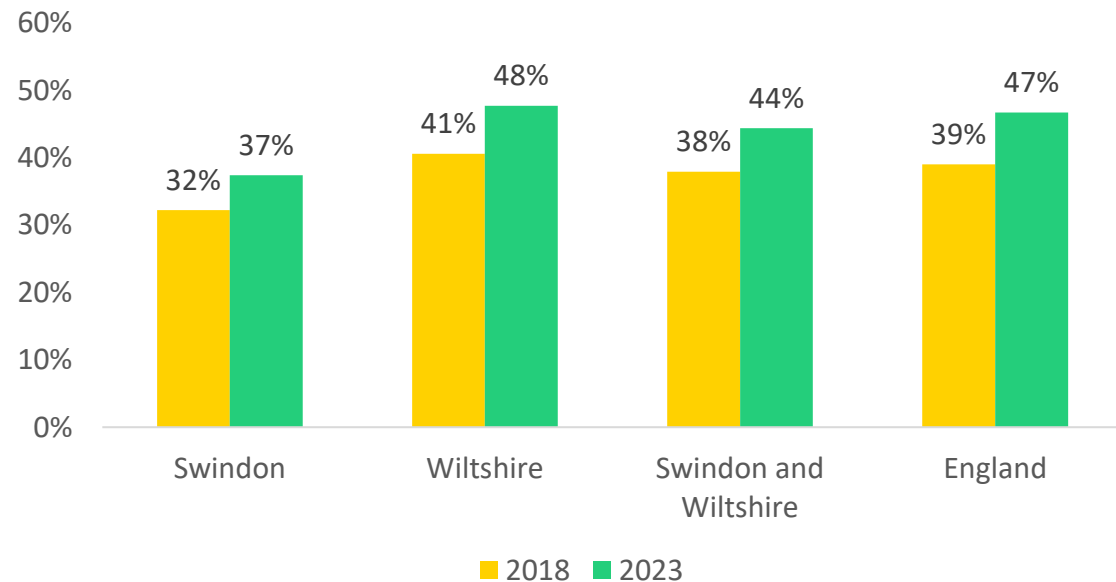
People – Skills and Education Supply

Residents qualified to Level 4 and above are under-represented in Swindon and Wiltshire.

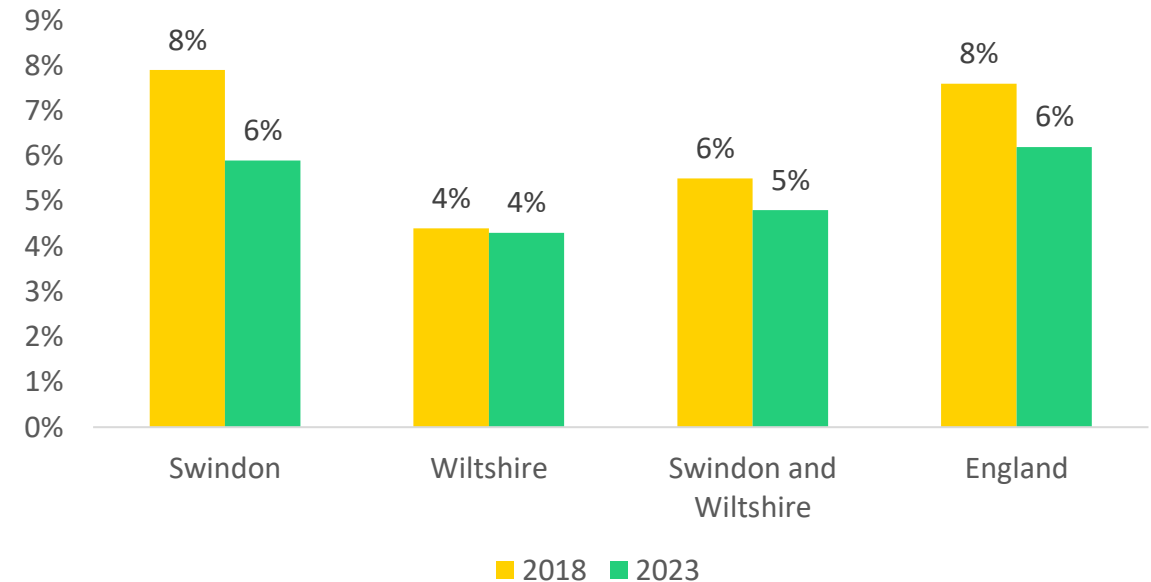
The proportion of residents educated to RFQ Level 4+ in Swindon and Wiltshire (44%) is below the England average (47%). Although this proportion has increased by 6 percentage points since 2018 (from 38%) the growth has been much faster in England (8 percentage point increase). Within Swindon and Wiltshire, almost half of residents in Wiltshire hold a level 4+ qualification at 48%, compared to just 37% in Swindon. Both areas have experienced similar levels of growth since 2018.

The proportion of residents with no qualifications in Swindon and Wiltshire (5%) is slightly lower than the national average (6%). Since 2018, this figure has reduced from 6%. England has seen a slightly larger reduction, from 8% to 6%. Within Swindon and Wiltshire, more residents hold no qualifications in Swindon (6%) than Wiltshire (4%).

Proportion of residents educated to RFQ Level 4+, 2018 and 2023



Proportion of residents with no qualifications, 2018 and 2023

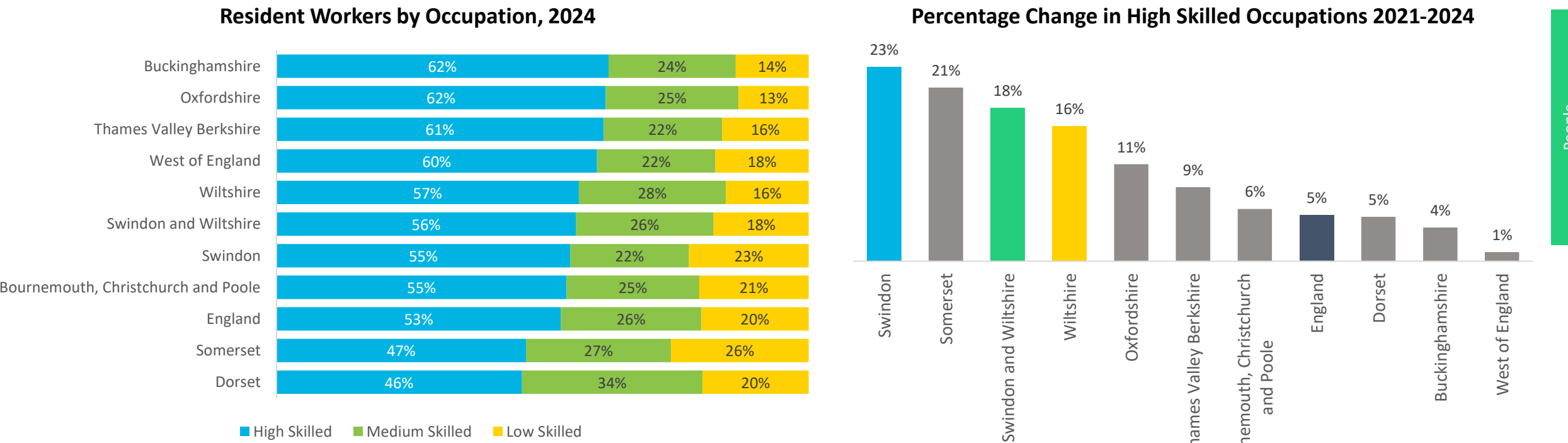


Source: Annual Population Survey, 2024

People – Skills and Education Supply

Swindon and Wiltshire has a high proportion of resident workers in high level occupations, and this cohort is growing rapidly compared to other comparator areas.

Swindon and Wiltshire’s occupational profile shows a higher proportion of high-level occupations (56%) compared to the national average (53%). However, compared to the comparator areas, such as Buckinghamshire and Thames Valley, the proportion of high skilled occupations is relatively low in Swindon and Wiltshire. However, there has been high levels of growth in these occupations since the pandemic, with a 23% increase since 2021 relative to 5% in England. If this continues, Swindon and Wiltshire may retain its competitive position relative to neighbouring areas who have also experienced significant growth in the proportion of resident workers holding high level occupations.



Source: Annual Population Survey, 2024

People – Skills and Education Supply

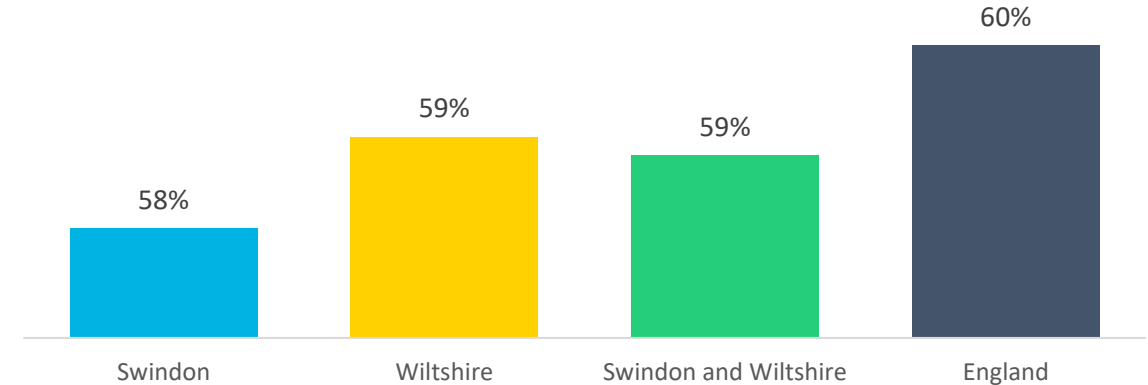
Investment in staff training is on par with the national average...

In 2022, 59% of staff in Swindon and Wiltshire received training, which is slightly below the national average (60%). There are some slight geographic differences, with 58% of staff in Swindon receiving training compared to 59% in Wiltshire.

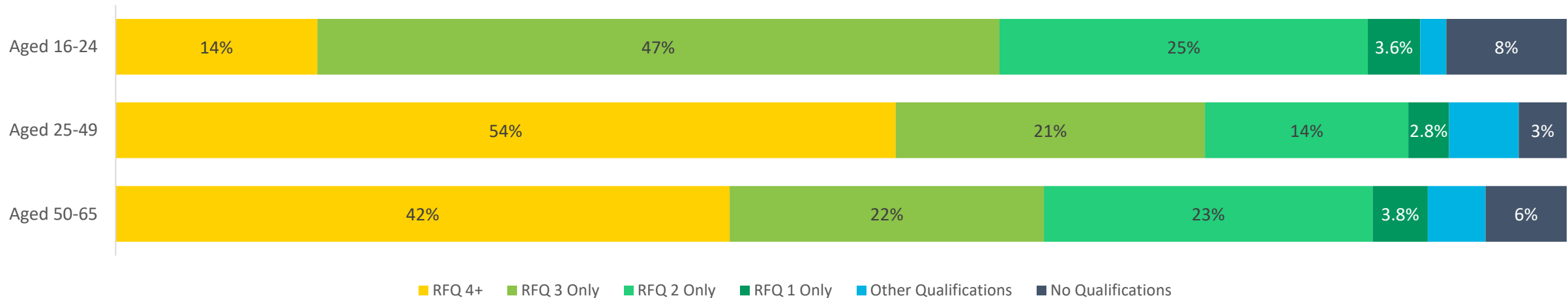
Within Swindon and Wiltshire, the 25-49-year-old age group are the most qualified, with over half (54%) of people holding level 4+ qualifications. This is above the 50-64-year-old age group, with 42% of people holding level 4+ qualifications, suggesting increasingly more people are becoming higher qualified.

The 16-24 cohort has the smallest proportion of people holding level 4+ qualifications; however, this is to be expected as a lot of people within this age group aren't old enough to gain these qualifications.

Percentage of staff who have received training in the last 12 months, 2022



Qualifications by age group in Swindon and Wiltshire, 2023



Source: Employer Skills Survey 2022; Annual Population Survey, 2024

People – Skills Demand

A tenth of employers identified skills shortages as a reason for vacancies within their company in Swindon and Wiltshire...

The Employer Skills Survey found that 10% of employers identified skills shortages as the reason behind vacancies in Swindon and Wiltshire, which is on par with the national average, but lower than comparator areas. The main skills shortages were cited to be specialist skills specific to a role (72%), time management (53%), knowledge of products and services offered by the organisation (50%) and problem-solving skills (55%)

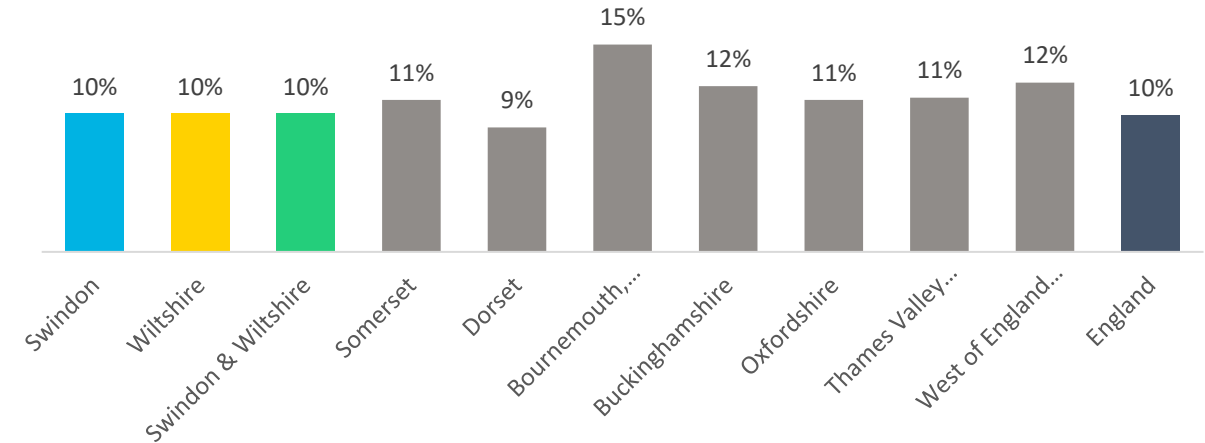
Swindon and Wiltshire had 14,188 jobs advertised in November 2024. 6,316 of these were in Wiltshire (59%) and 5,858 of these were in Swindon (41%). Job postings in Swindon and Wiltshire have remained around the same over the past four years, with slightly more postings in Wiltshire than Swindon.

Many sectors experienced increases in the number of vacancies between December 2023-2024. These included:

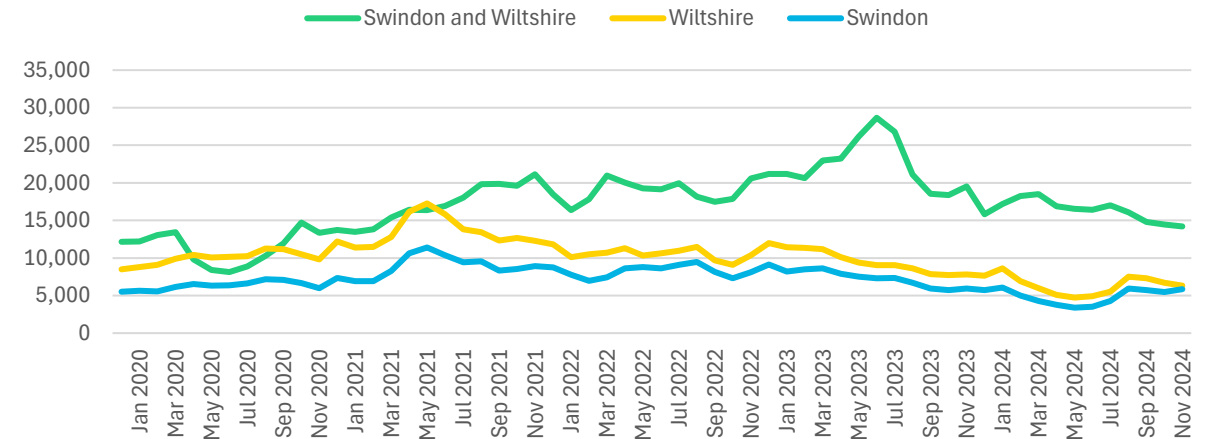
- Employment Activities
- Human Health Activities
- Retail Trade (Except motor vehicles and motorcycles)
- Food and Beverage service activities
- Residential care activities

Source: Employer Skills Survey 2022, Lightcast 2024

% of Vacancies due to skills shortages, 2022



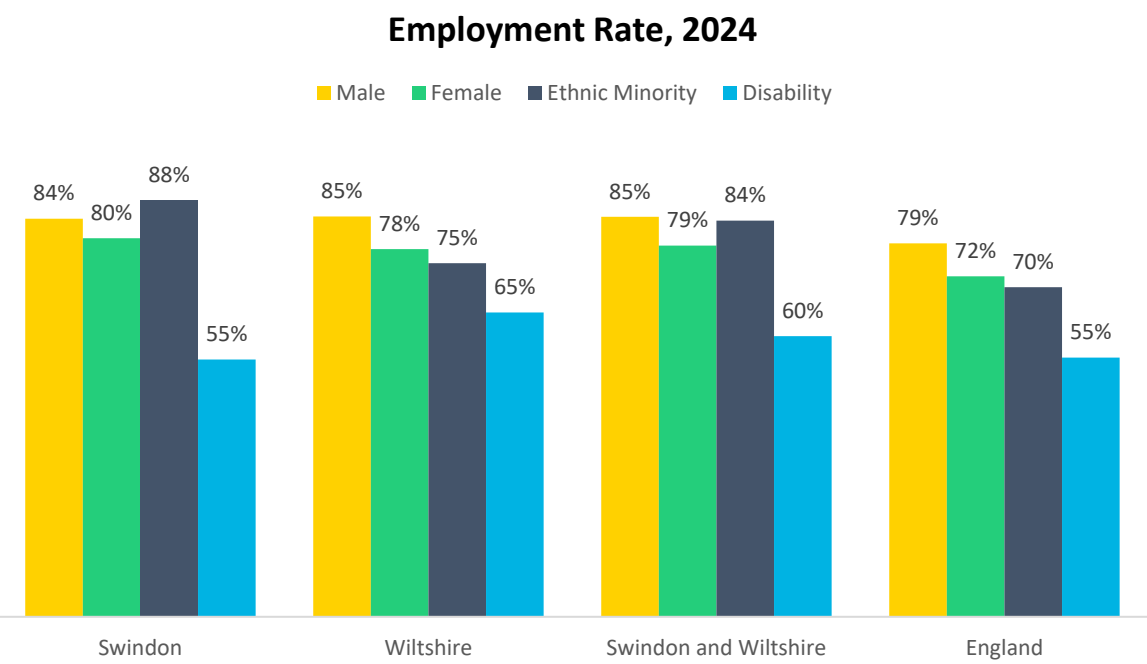
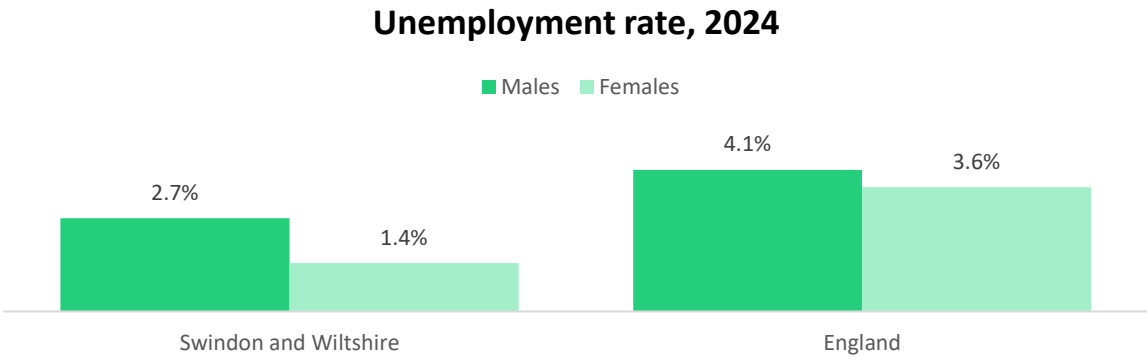
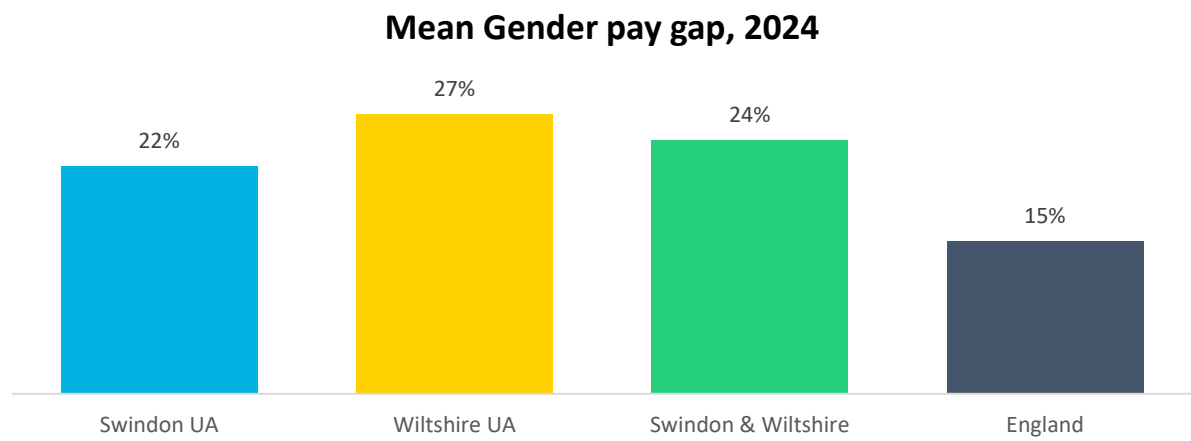
Job Postings in Swindon and Wiltshire, 2020-2024



People – Socio-Economic Issues

Although the area has a strong labour market, there are disparities across the population...

Whilst females tend to have lower employment rates than males, more women are economically active in Swindon and Wiltshire compared to nationally (79% compared to 72%). Similarly, more disabled people are economically active in Swindon and Wiltshire compared to the national average (60% and 55% respectively). However, disabled people are much less likely to be employed in Swindon (55%) than Wiltshire (65%). Swindon and Wiltshire has a low unemployment rate amongst females (1.4%) which is much lower than the male unemployment rate (2.7%) and the national unemployment rate (3.6%). However, there is a significant gender pay gap in Swindon and Wiltshire (24%) which is much higher than the national average (15%). The gender pay gap is larger in Wiltshire than Swindon. This suggests that while there is a high number of women in employment, a significant proportion of them are entering low paid work.



Source: Annual Population Survey, 2024; Pay discrepancies of FTE employments by gender, 2024

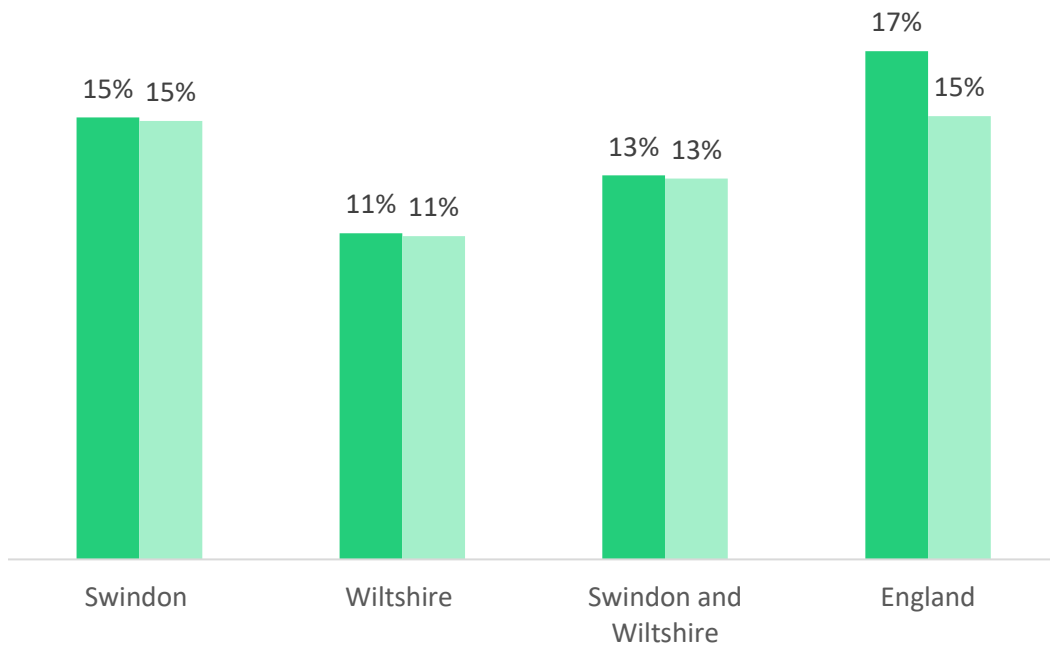
People – Socio-Economic Issues

In 2022/23, the average child poverty rate in Swindon and Wiltshire was below the national average...

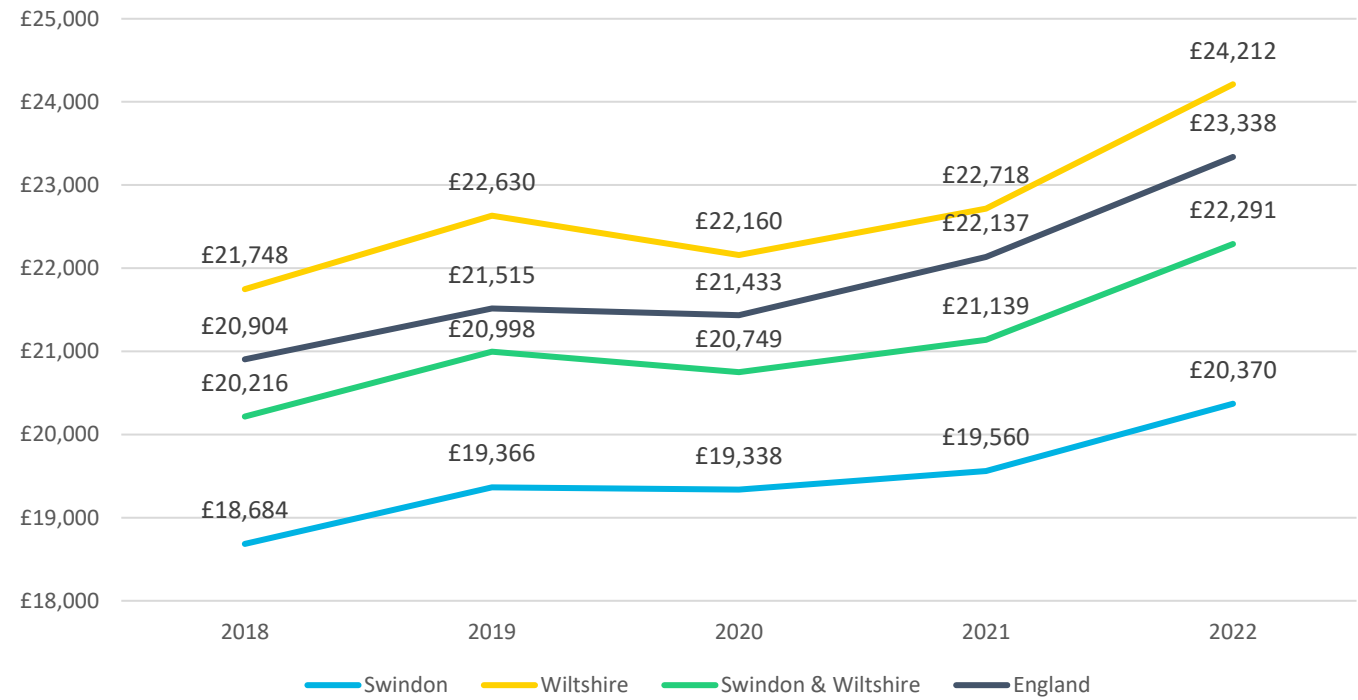
Absolute and relative child poverty in Swindon and Wiltshire were both at 13% compared to 15% nationally for absolute poverty and 17% nationally for relative poverty. Although this is lower than the national average, this is still a significant figure in absolute terms, with a total of 31,123 children living in poverty. There are also spatial differences, with Swindon recording a higher child poverty rate at 15% than Wiltshire (11%). In Swindon and Wiltshire, the GDHI per head of population is higher than the national average, at £22,291. However, there are spatial disparities, with Wiltshire having a significantly higher GDHI at £24,212 to just £20,370 in Swindon. Considering the output per hour worked in Swindon is so strong, the increasing gap between the national rate for gross disposable income is concerning.

Child Poverty Rates, 2022/23

■ Relative poverty rate ■ Absolute poverty rate



Gross Disposable Household Income (GDHI), per head of population, 2018-2023



Source: House of Commons, 2023; ONS Regional gross disposable household income, 2023

People – Socio-Economic Issues

Deprivation issues across Wiltshire is not significant overall according to the Index of Multiple Deprivation, with only 5% of LSOAs in the top 20% most deprived areas nationally.

Wiltshire has an average IMD decile score of 7 (where 1 represents the most deprived 10% of areas in England and 10 the least deprived). However, geographic disparities can be observed across the local authority with notable examples of deprivation in town centres such as Salisbury and Trowbridge. While overall, deprivation is not a significant challenge in Wiltshire, some acute issues persist, particularly in barriers to housing, where 42% of LSOAs are in the top 20% most deprived nationally. This domain considers affordability and availability of housing in an area and therefore may express house prices being out of kilter with local earnings. It should be noted that this data is based on 2019 calculations, given the now 6-year gap between the publication of this LEA and this data caution should be taken when drawing significant conclusions as this will not consider recent economic disruptions – notably the COVID-19 pandemic.

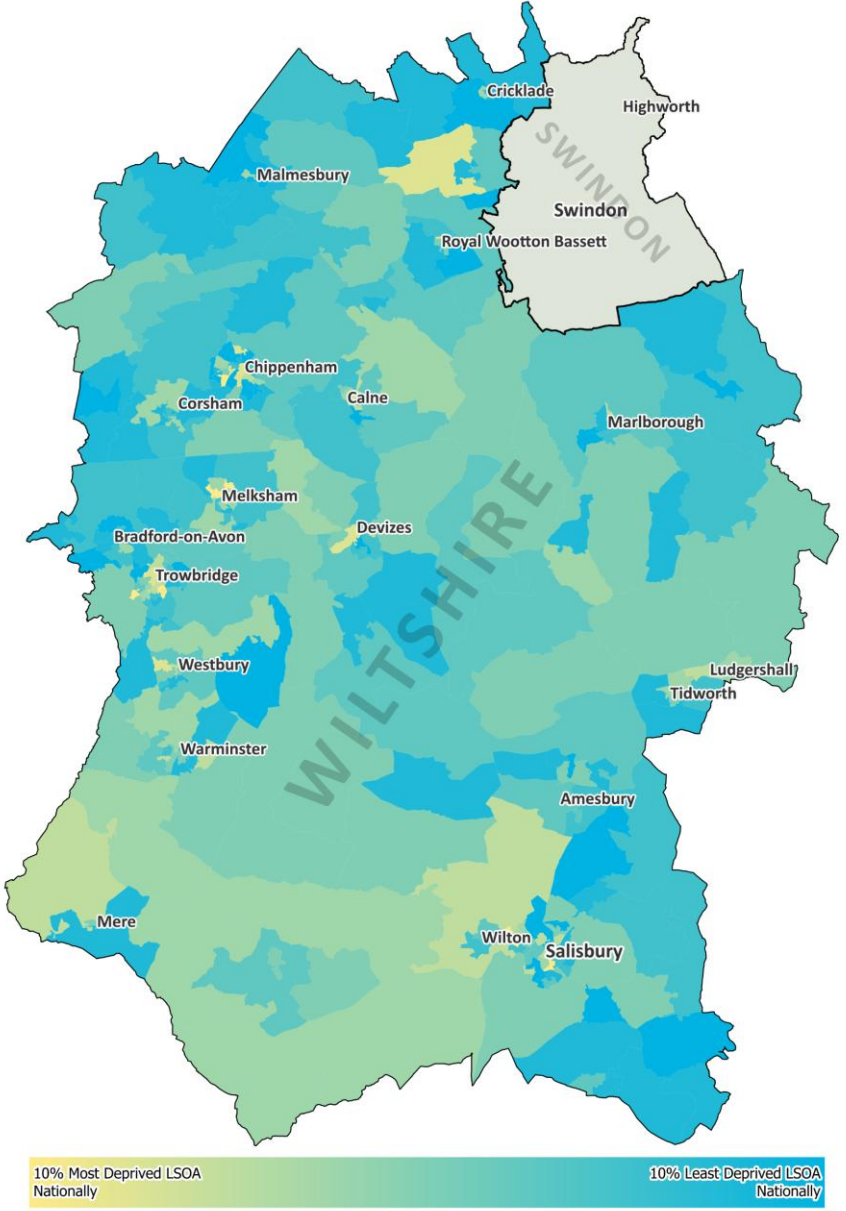
Domains and Shape of Deprivation, Wiltshire, 2019

IMD Domain	LSOAs in 20% most Deprived	% of LSOAs in 20% most Deprived
IMD	15	5%
Income	17	6%
Employment	26	9%
Education, Skills and Training	51	18%
Health	6	2%
Crime	10	4%
Barriers to Housing	119	42%
Living Environment	57	20%

...of 285 Wiltshire LSOAs



Index of Multiple Deprivation, Wiltshire, 2019



Source: Index of Multiple Deprivation, MHCLG, 2019

People – Socio-Economic Issues

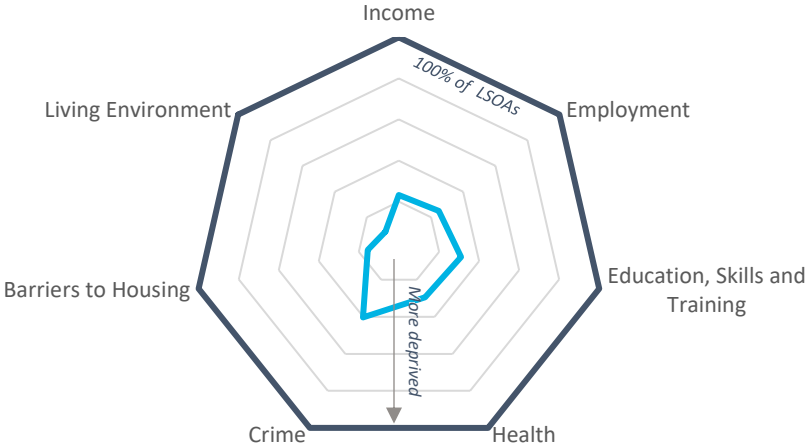
Deprivation issues are prevalent in Swindon with 22% of LSOAs are in the top 20% most deprived areas nationally.

The average IMD decile score in Swindon is 6 (where 1 represents the most deprived 10% of areas in England and 10 the least deprived). Deprivation challenges tend to be concentrated around Swindon town centre and immediate town centre neighbourhoods. Aside from the living environment and barriers to housing, Swindon’s LSOAs are overrepresented in the most deprived areas nationally. Significantly crime deprivation is a challenge with 40% of areas in the district being in the top 20% most deprived nationally. As with Wiltshire, data is based on 2019 calculations, therefore caution should be taken when drawing significant conclusions as this will not consider recent economic disruptions.

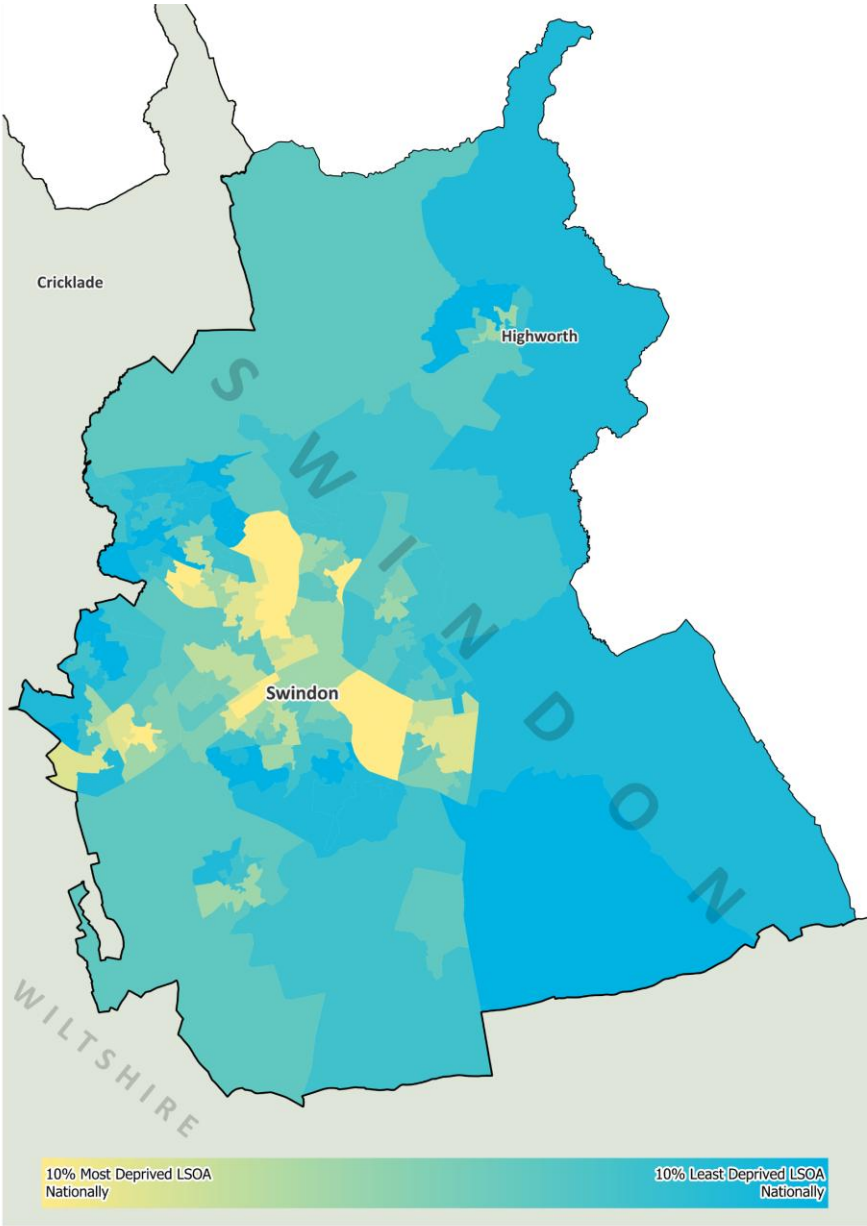
Domains and Shape of Deprivation, Swindon, 2019

IMD Domain	LSOAs in 20% most Deprived	% of LSOAs in 20% most Deprived
IMD	28	22%
Income	30	23%
Employment	32	25%
Education, Skills and Training	40	31%
Health	38	29%
Crime	52	40%
Barriers to Housing	20	16%
Living Environment	11	9%

...of 129 Swindon LSOAs



Source: Index of Multiple Deprivation, MHCLG, 2019



People – Socio-Economic Issues

The social mobility index measures the chances a child from a disadvantaged background has of performing well in life and ranks this against the other local authorities in the country. The index considers four elements of social mobility and ranks all local authorities based on these:

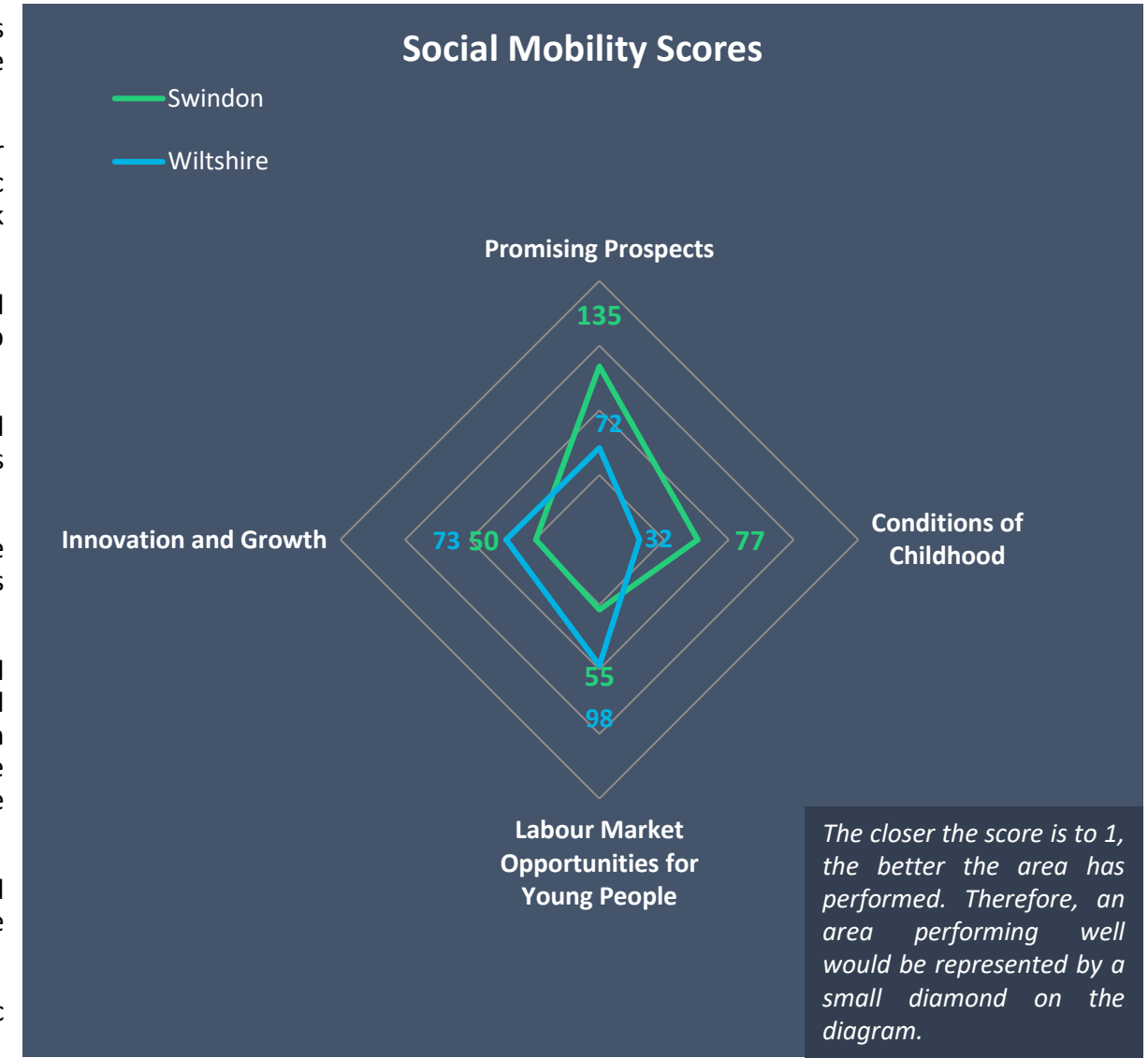
- Promising Prospects:** A measure of education levels, professional work and earnings for 25–44-year-olds. Measuring how well young people from similar socio-economic backgrounds do in education and labour markets and how well they do as they enter work aged 25–44.
- Conditions of Childhood:** A measure of childhood poverty and the qualifications and occupation levels of parents. This index considers the conditions in which children grow up in.
- Labour Market Opportunities for Young People:** Measures occupation and unemployment rates for 16–29-year-olds, outlining which areas offer more or less favourable employment opportunities for young people.
- Innovation and Growth:** Measures how well areas in the UK offer conditions to promote innovation and economic growth. This metric considers broadband speed, business spending on R&D and the percentage of residents with postgraduate qualifications.

Both Swindon and Wiltshire perform comparatively poorly on the promising prospects and labour market opportunities measures, whilst having a middling rank on innovation and growth and conditions of childhood. The diagram shows how Swindon and Wiltshire perform against each metric of social mobility on a scale of 1–203 local authorities. The closer the score is to 1, the better the area has performed. Therefore, an area performing well would be represented by a small diamond on the diagram.

There were also geographic disparities in social mobility scores. For example, Swindon ranked poorly for promising prospects, at 135 out of 203, whereas Wiltshire ranked 98th. Wiltshire also ranked well for conditions of childhood at 32, whereas Swindon ranked 77th.

Overall, the Swindon and Wiltshire area performs well in terms of child poverty and economic growth but needs improvement in its education and employment prospects for young people.

Source: Social Mobility by area, 2024



People – Socio-Economic Issues

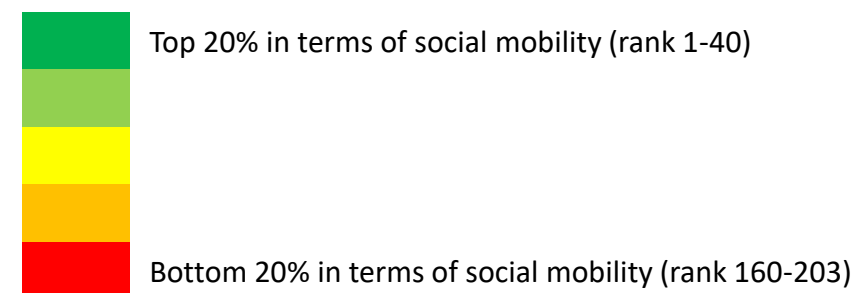
Swindon and Wiltshire perform well in terms of social mobility compared to most of the comparator areas, however, the area performs poorly in comparison to Oxfordshire and Buckinghamshire...

The table below shows how each comparator area performs against each element of social mobility, with dark green showing the top 20% of local authorities and red showing the bottom 20%. Swindon and Wiltshire falls mostly into the top 40% category, with the exception of the 'Promising Prospects' element, which has been largely skewed by low prospects in Swindon.

Swindon and Wiltshire performs well in comparison to the nearby areas of Dorset, Somerset, and Bournemouth, Christchurch and Poole, especially in the 'Innovation and Growth' element. However, it pales in comparison to Oxfordshire and Buckinghamshire, which are in the top 20% of areas for social mobility. For example, Oxfordshire is the 7th best local authority in terms of Innovation and Growth. Swindon and Wiltshire have a lot to learn from these two places if they want to close gaps in social mobility.

Indicator	Swindon	Wiltshire	Swindon and Wiltshire	Dorset	Somerset	Bournemouth, Christchurch and Poole	Oxfordshire	Buckinghamshire
Promising Prospects	135	72	104	83	130	61	50	12
Conditions of Childhood	77	32	55	67	85	59	11	17
Labour Market Opportunities for young people	55	98	77	83	53	123	17	16
Innovation and growth	50	73	62	174	146	90	7	33

People



Source: Social Mobility by area, 2024

People – Socio-Economic Issues

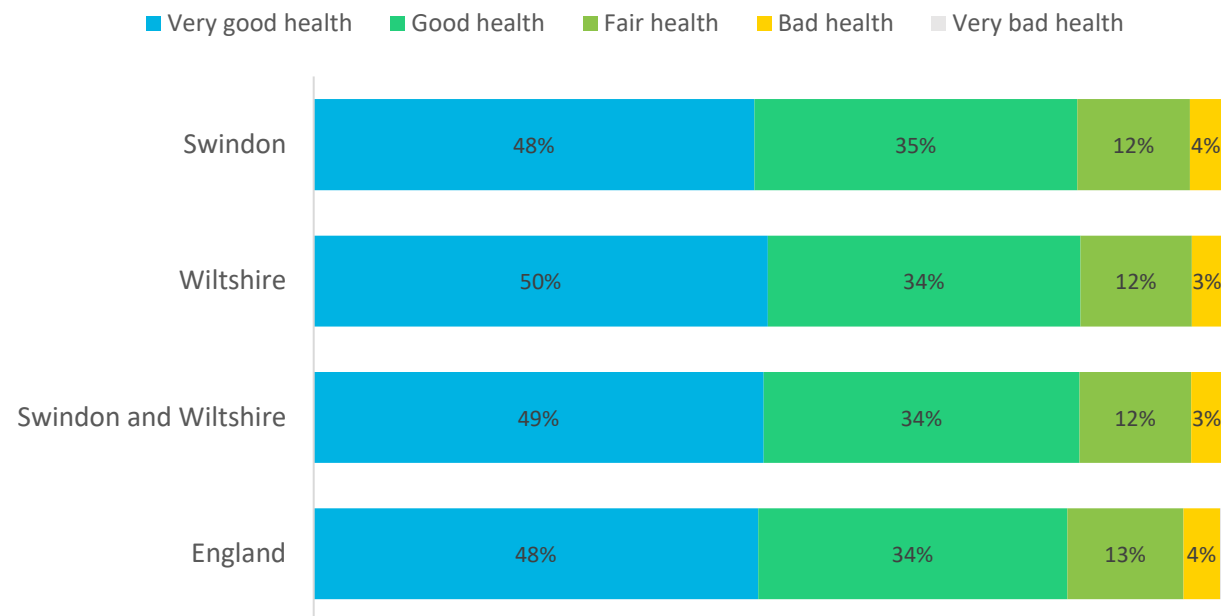
General health and unpaid care is in line with the national average...

Swindon and Wiltshire's population is in good health, with nearly half of the population reporting 'very good health', slightly above the national average. This is slightly higher than the national average (48%). A below average population are in bad or very bad health (4% compared to 5% nationally).

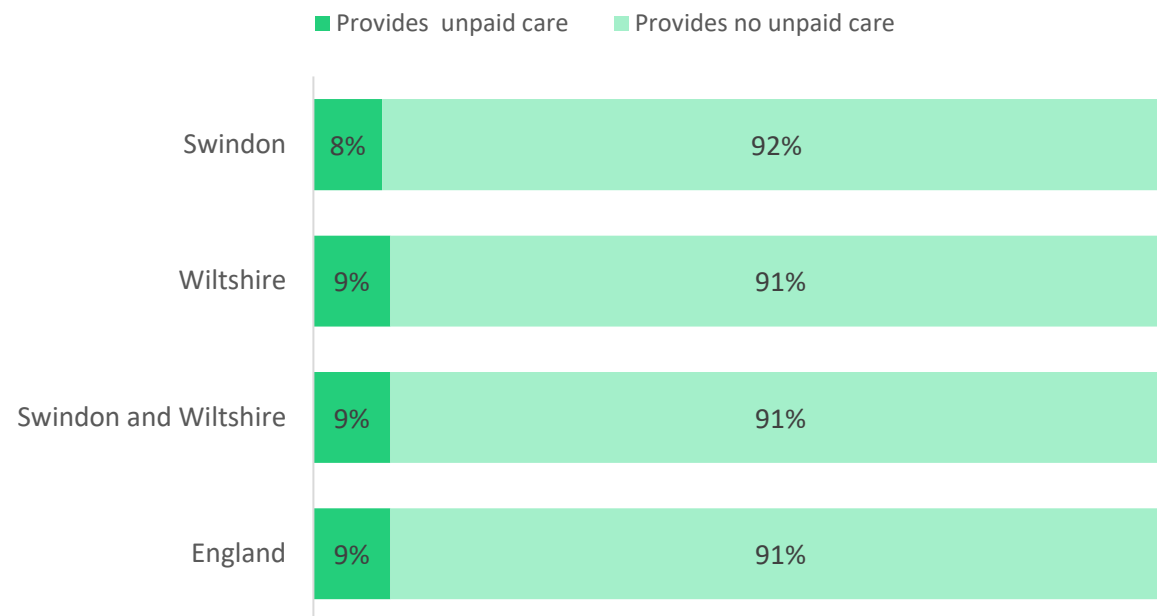
Within Swindon and Wiltshire, residents of Wiltshire have better health than those in Swindon, with half of residents reporting very good health and 4% of residents reporting bad or very bad health. This is to be expected as levels of health deprivation in Wiltshire were lower than Swindon.

60,578 people in Swindon and Wiltshire provided unpaid care in 2021 (9% of the population). This is in line with the national average. 70% of carers were in Wiltshire and the remaining 30% were in Swindon.

General Health, 2021



Provision of Unpaid Care, 2021



Source: Census, 2021

People – Policy Implications

At present there are no significant demographic stresses in the populations of Swindon and Wiltshire. Both areas have a working age population that is proportionately in line with the national rate, 60% and 64% respectively compared to 63% nationally. A healthy working age population will allow for the areas to maintain skills supply in line with the goals of the Swindon and Wiltshire Local Skills Report.

Economic inactivity also remains lower in both local authorities compared to the national rate; this is a sign of a well utilised labour market but may present some challenges in filling vacancies. To overcome this an efficient labour market needs to ensure skills in demand are aligned with skills the skills held by residents. Lower economic inactivity rates align with the Get Britain Working (white paper) and should be closely considered when looking at labour market interventions.

Over recent years both areas have seen very strong growth in the number of residents working in higher skilled occupations, potentially indicating positive change in the labour market and opening up opportunities for higher skilled and higher paid roles for residents. Having a greater share of residents in higher skilled occupations will also likely encourage investment as businesses see the opportunity of accessing an existing highly skilled labour market.



6. Place

Place – Summary Findings



Industrial floorspace in Swindon and Wiltshire has grown by **137% over the past ten years**, with **Swindon holding 35% and Wiltshire 65% of total floorspace**. This growth has supported significant sectoral expansion, particularly in the transport and storage sector, which saw a 20% increase in the number of businesses.



Transport emissions are the largest source of CO2 in Swindon and Wiltshire, with **Swindon having a higher percentage (43%) than Wiltshire (38%)**. Both areas have higher transport emissions than nationally (30%). Major strategic transport routes including the M4 will play a role here. Moreover, given Wiltshire's rural nature travelling around the district will inevitably result in greater transport emissions.



Recycling rates in Swindon and Wiltshire (41%) are in line with the national trends (40%), however **Wiltshire recycles more waste than Swindon (42% compared to 37%)**.



In Wiltshire, the median house price is **£325,000** whereas in Swindon it is **£265,000**. Buying and renting housing is more affordable in Swindon than surrounding areas, whereas in Wiltshire, house prices are in line with the national average (£327,000). The national figure also includes London house prices, which are extremely high. Therefore, Wiltshire isn't as affordable a place to live compared to Swindon. It is also worth noting that there will be differences in house prices within the local authorities that this dataset does not capture.



Confidence in achieving 5G mobile connectivity is lower in Swindon and Wiltshire (68%) compared to the UK average (83%), with **Swindon showing higher confidence than Wiltshire, (79% and 57% respectively)**. The highest broadband speeds are found in specific Growth Zones settlements including Swindon, Melksham, and Amesbury. Rural areas have historically faced challenges around digital connectivity. Recent initiatives have sought to resolve this such as Project Gigabit.



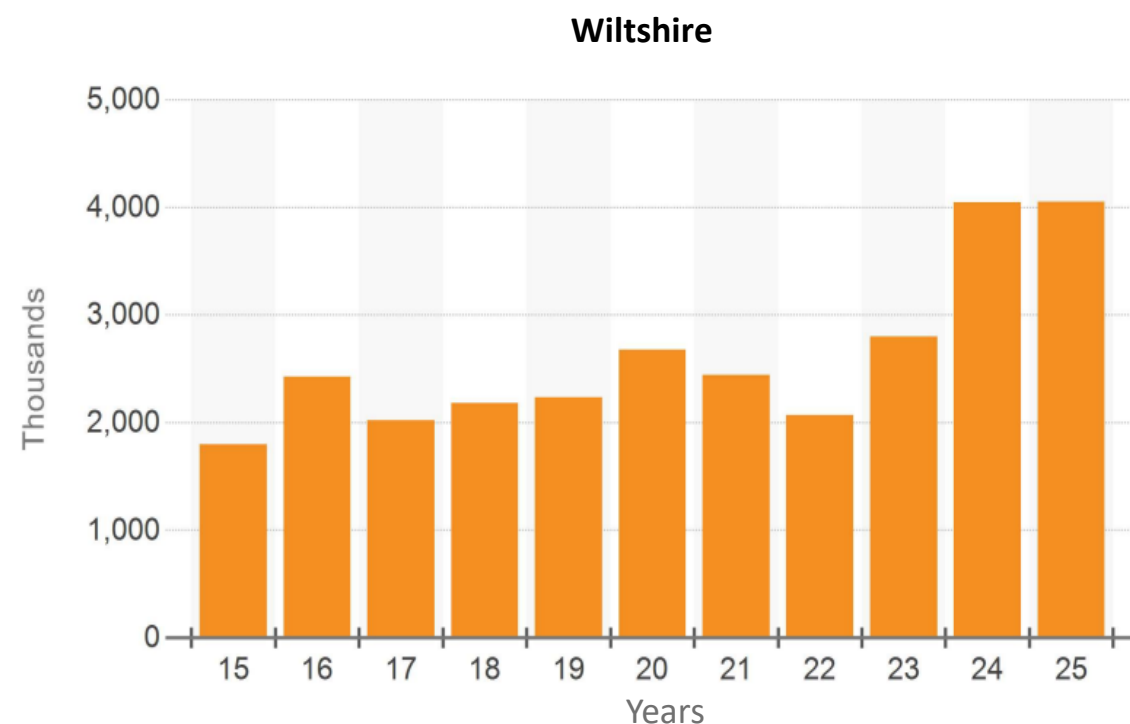
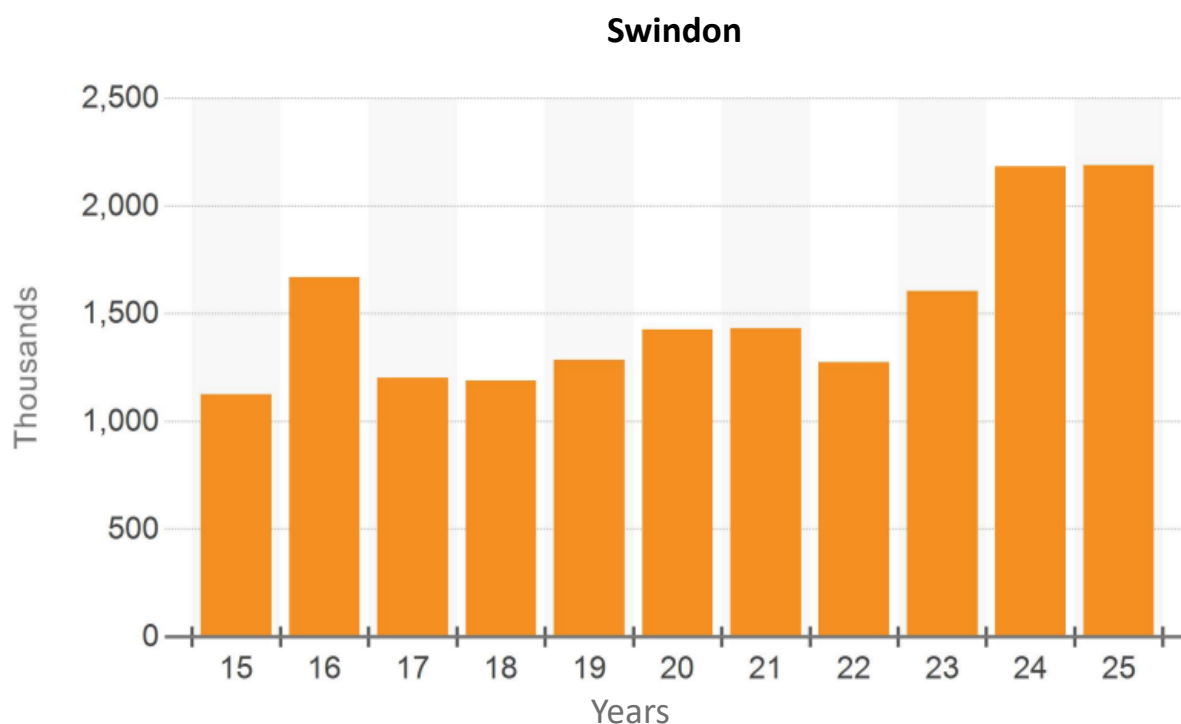
CO2 per capita in Swindon and Wiltshire **has reduced by 31% since 2012 compared to 35% nationally**. Although Swindon has consistently had a lower CO2 production per capita rate than the national average, Wiltshire's rate has been higher.

Place – Commercial Property

Industrial floorspace stock across Swindon and Wiltshire has been growing consistently over the past ten years...

There is currently 6.2 million sq. ft of industrial floorspace in Swindon and Wiltshire, of which Swindon holds 35% and Wiltshire holds 65% of the total stock. There is around 3,300,000 sq. ft more industrial floorspace in Swindon and Wiltshire than there was ten years ago, suggesting a strong rate of growth (137%). The growth in industrial floorspace has supported wider sectoral growth across Swindon and Wiltshire. For example, the number of businesses in the transport and storage sector have experienced significant growth (20%), the highest of any other broad industry group in Swindon and Wiltshire.

Total Industrial Floorspace (sq. ft) – 2015/25, thousands



Place

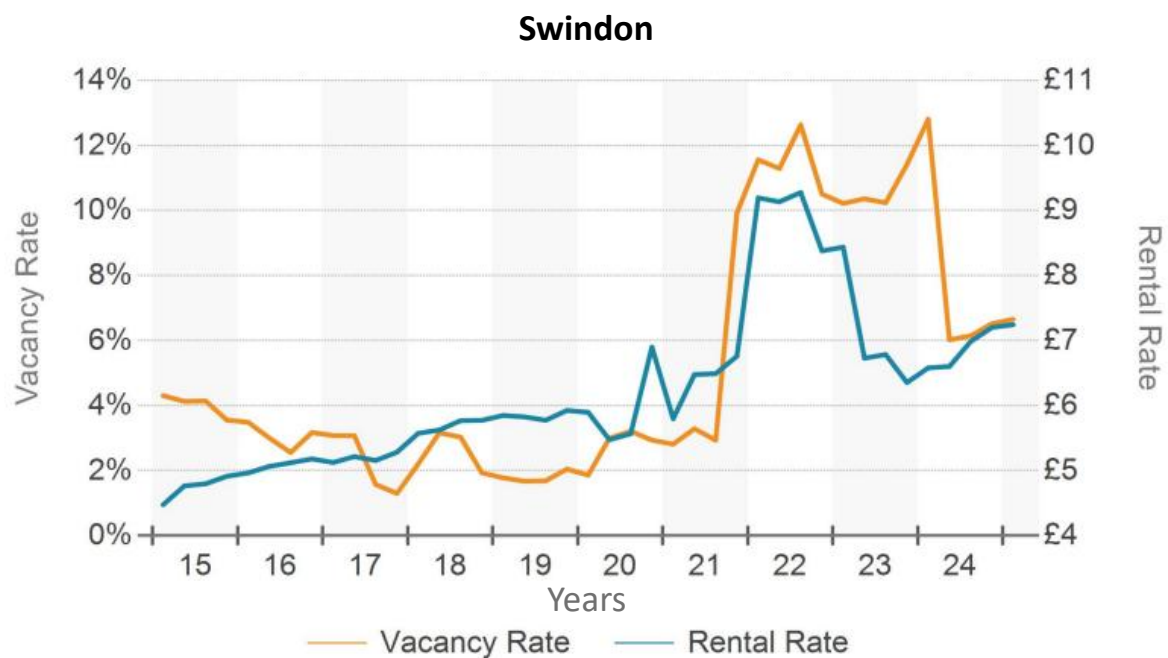
Source: CoStar, 2025

Place – Commercial Property

Both vacancy rates and Rental rates of industrial property have risen in the past ten years...

In Swindon and Wiltshire, the percentage of industrial property vacancies is growing. Approximately 7% of industrial floorspace is vacant, equivalent to around 436,757 sq. ft of industrial floorspace. At the same time, the average price for industrial floorspace across the Swindon and Wiltshire area was £7.18 per sq. ft, significantly higher than ten years ago (£4.50). In 2021, there was a sharp increase in both vacancy and rental rates across Swindon and Wiltshire, and this did not decrease until 2023. This may have been a by-product of new ways of working and the economic impact of the covid pandemic.

Industrial Property Vacancy Rates (%) and Rental Rates (£), 2015-2025

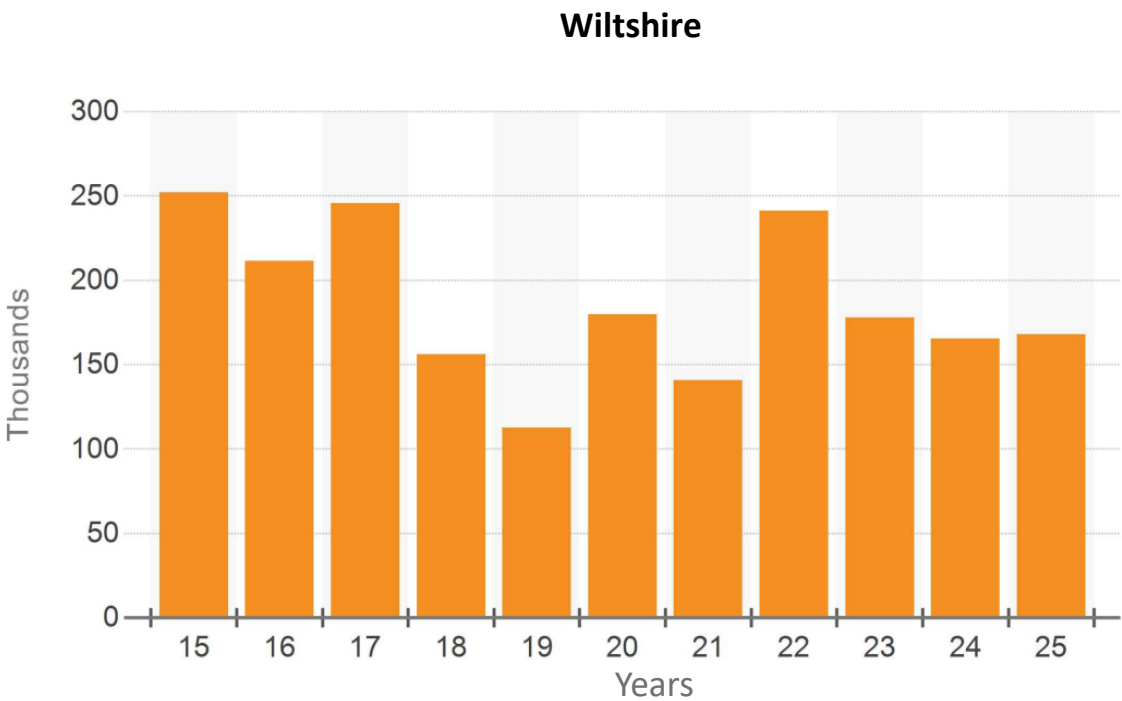
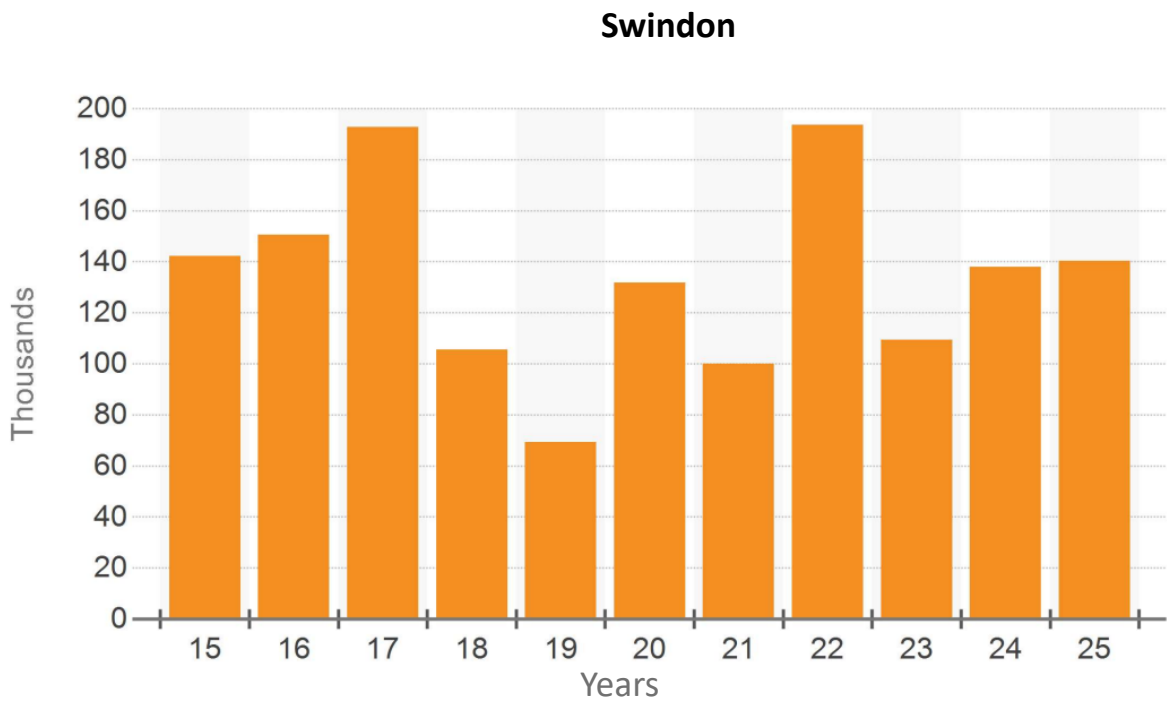


Source: CoStar, 2025

In contrast, light industrial floorspace has decreased over the past ten years...

Light Industrial floorspace is defined as floorspace for manufacturing activity that uses fewer raw materials, space and power. This means that in Swindon and Wiltshire, floorspace for light industry is smaller than heavy industry, at 308,060 sq. ft. There is slightly more floorspace in Wiltshire (54%) than Swindon (46%). Light industrial floorspace has fluctuated slightly over the past ten years in both areas, however today floorspace is 21% lower than it was in 2015. Wiltshire has seen a larger decline in light industrial floorspace (33%) than Swindon, which is in line with 2015 levels.

Total Light industrial floorspace (sq. ft) 2015-2025, thousands



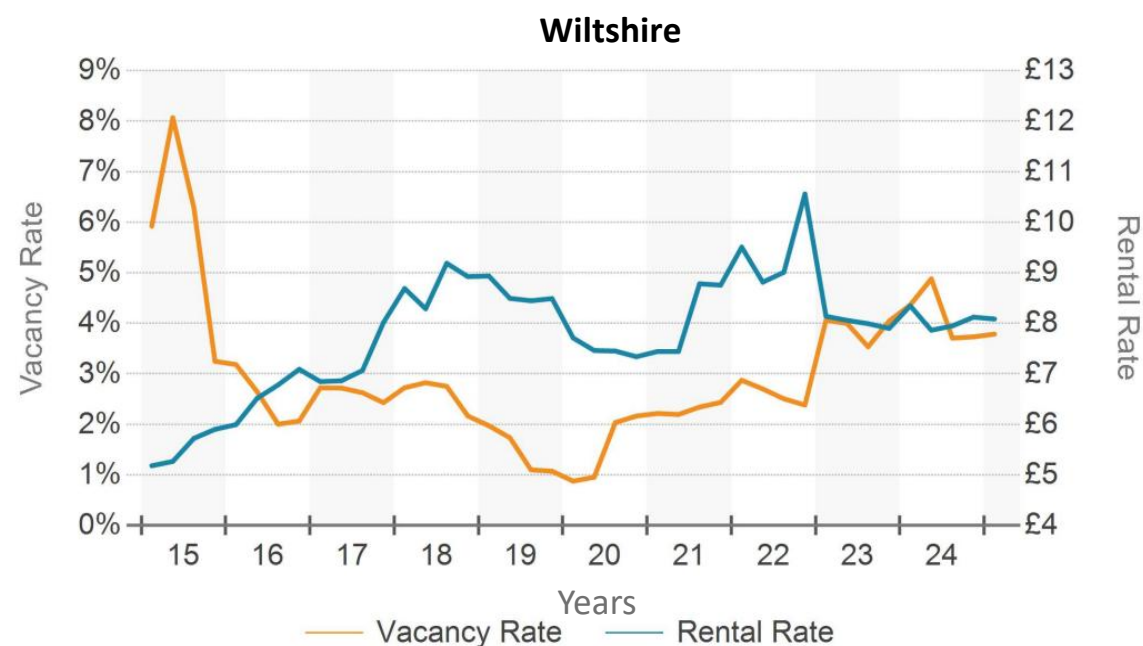
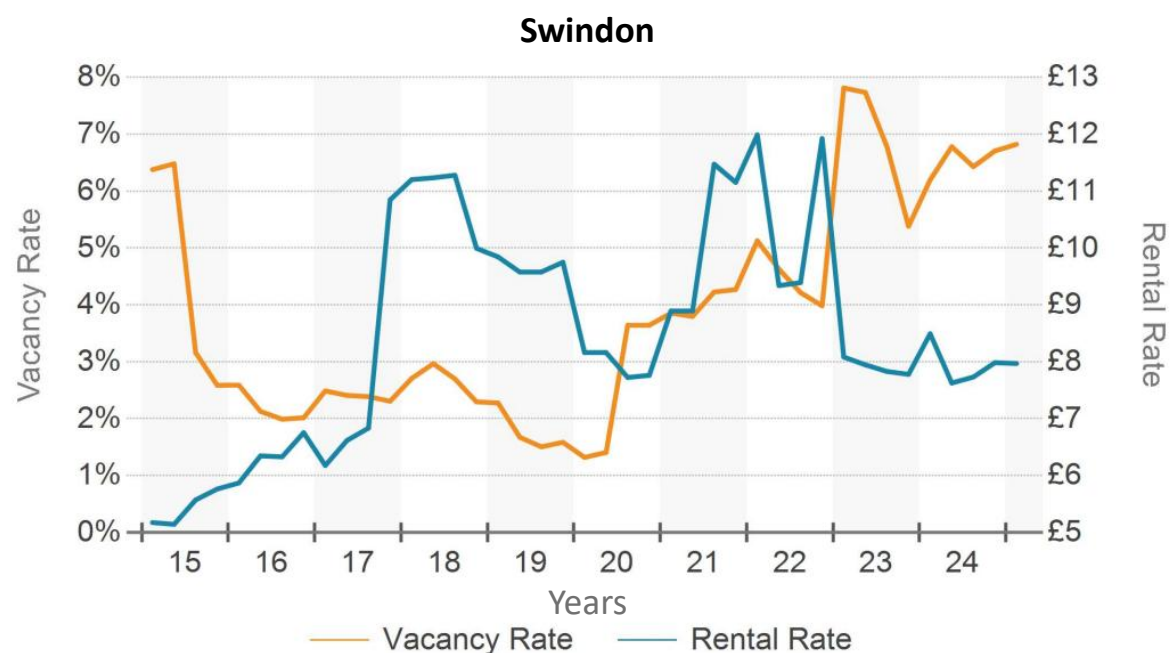
Source: CoStar, 2025

Place – Commercial Property

There are geographical disparities in vacancy rates of light industrial property across Swindon and Wiltshire...

The average vacancy rate for light industrial floorspace in Swindon and Wiltshire is 5.3%, a net decrease from 2015 (6.2%). In Swindon, vacancy rates of light industrial property are 6% higher than they were ten years ago, yet in Wiltshire vacancy rates are 35% lower than they were ten years ago. Rental rates, however, have increased in both areas- by 57% in Swindon and 58% in Wiltshire. The average rental rate per square foot in Swindon and Wiltshire is now £8, compared to £5 ten years ago. This suggests that there has been a higher demand for light industrial property in Wiltshire than in Swindon.

Light Industrial Property Vacancy Rates (%), and rental rates (£), 2015-2025



Place

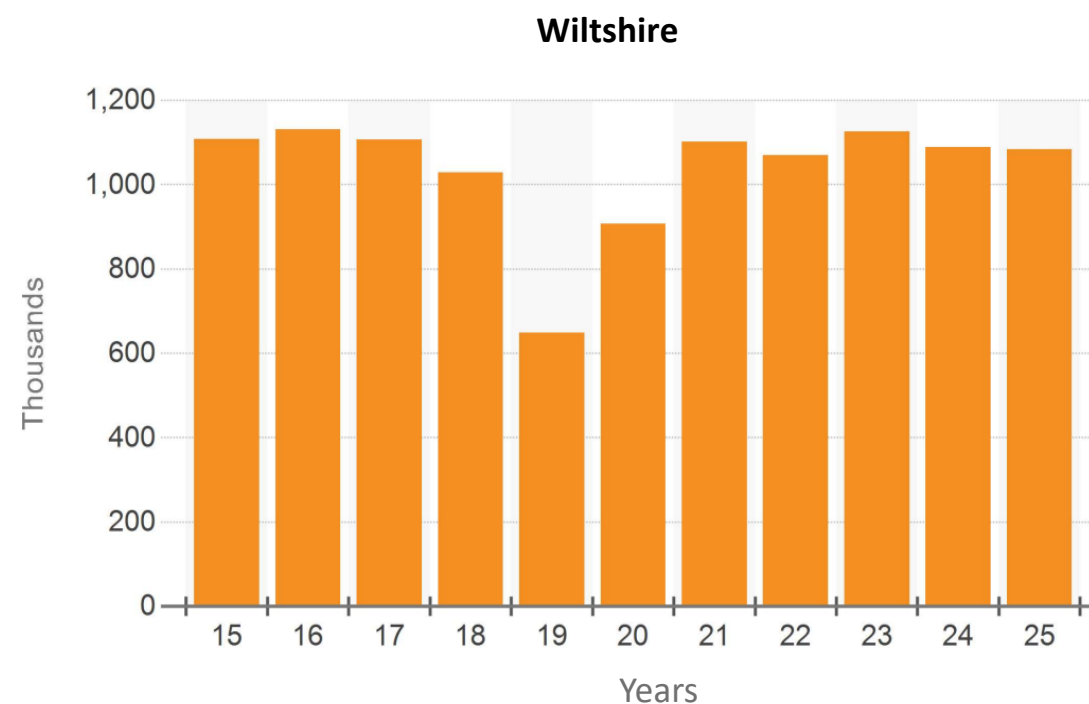
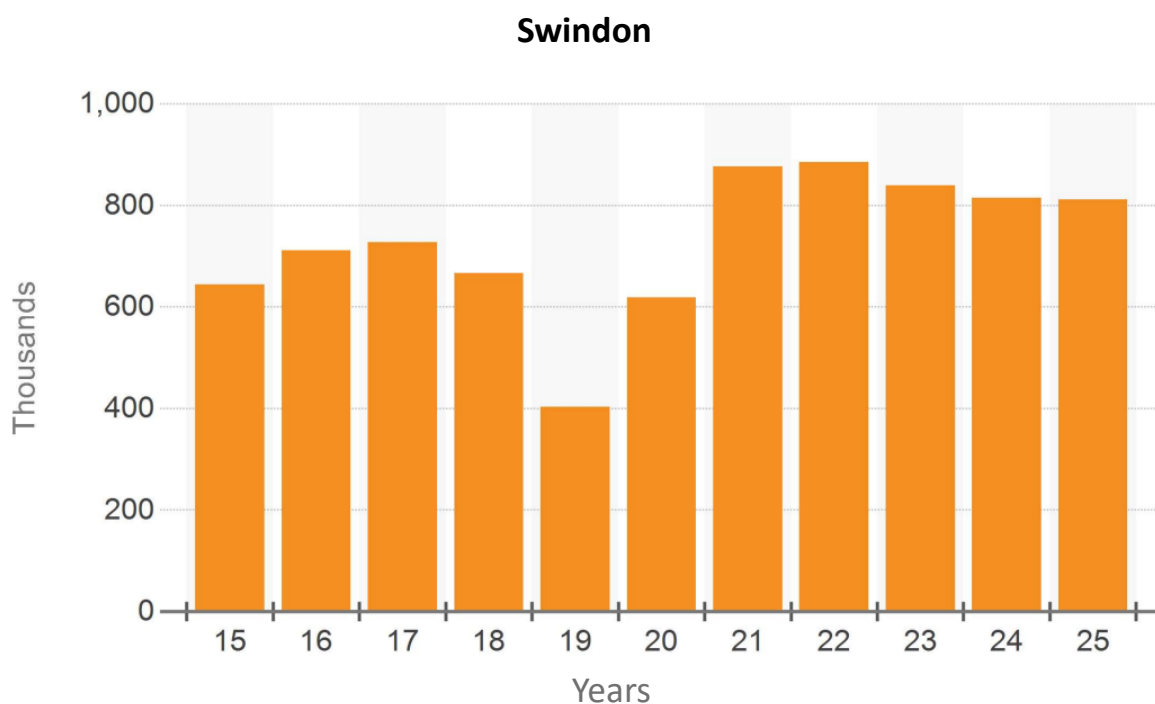
Source: CoStar, 2025

Place – Commercial Property

Office space across Swindon and Wiltshire has stayed roughly the same in recent years...

There is currently 1.9m sq. ft total office floorspace within Swindon and Wiltshire, with a slightly larger stock in Wiltshire (57%) than Swindon (43%), despite Swindon making up just 7% of the total land area, reflecting its strategically significant role as a hub for employment. Since 2015, there has been a net increase in office floorspace in Swindon (34%), whereas Wiltshire's office floorspace has stayed relatively stable. Both areas experienced a sudden decline in available office floorspace in 2019 but have since recovered.

Total Office floorspace (sq. ft) 2015-2025, thousands



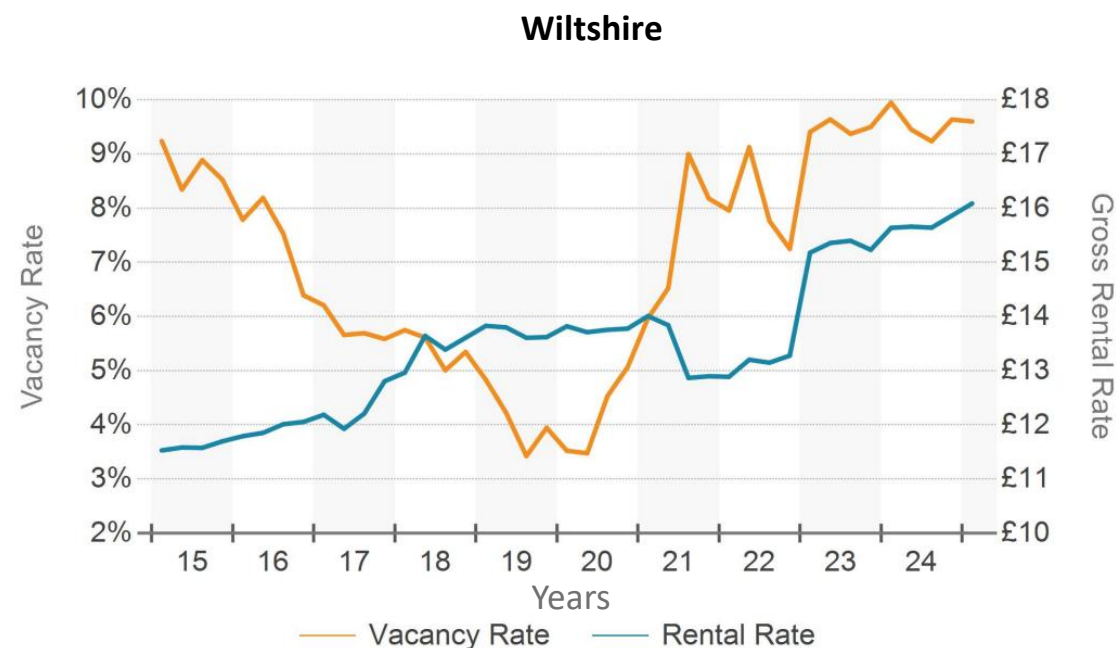
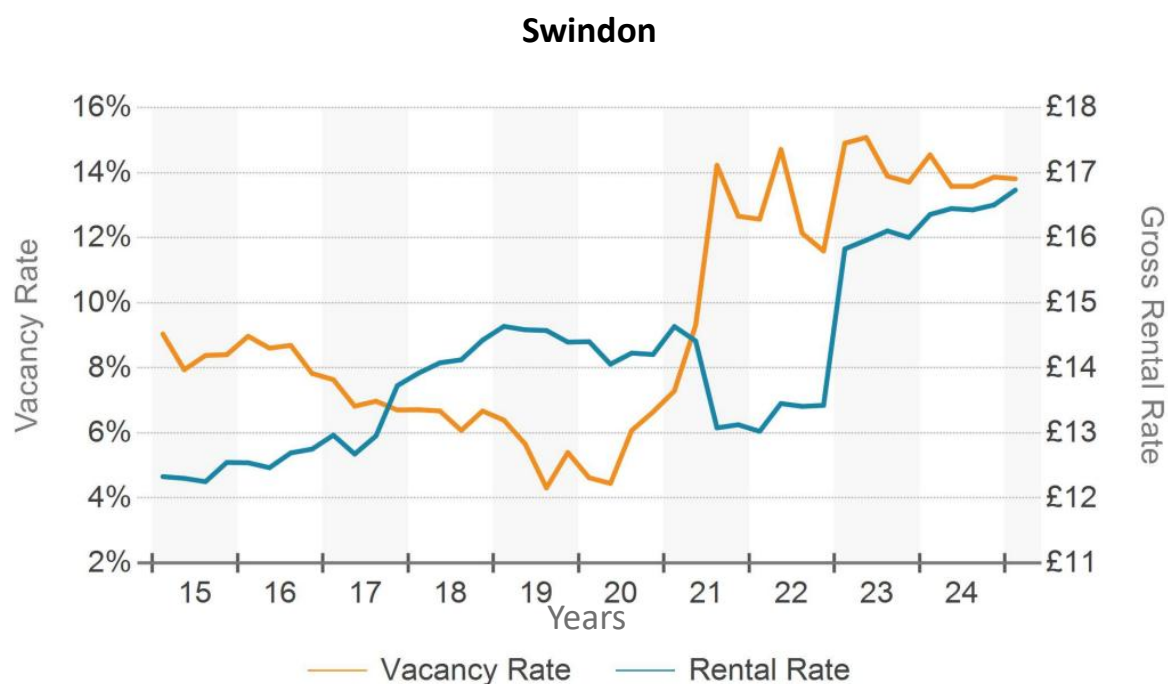
Source: CoStar, 2025

Place – Commercial Property

Both vacancy rates and rental rates have risen significantly in recent years...

In Swindon and Wiltshire, approximately 11.7% of office floorspace is vacant, equivalent to 221,742 sq. ft of office floorspace. The rate of vacancy across the area has been increasing since 2019, when it stood at 3.5%. This increase in vacancy comes against a backdrop of a decline in Professional, Scientific and Technical businesses in the area (-19%). Despite this, rental values have been rising since 2015, with the average price per sq. ft of office floorspace in Swindon and Wiltshire being £16.40, a 38% increase since 2015.

Office Property Vacancy Rates (%), and rental rates (£), 2015-2025



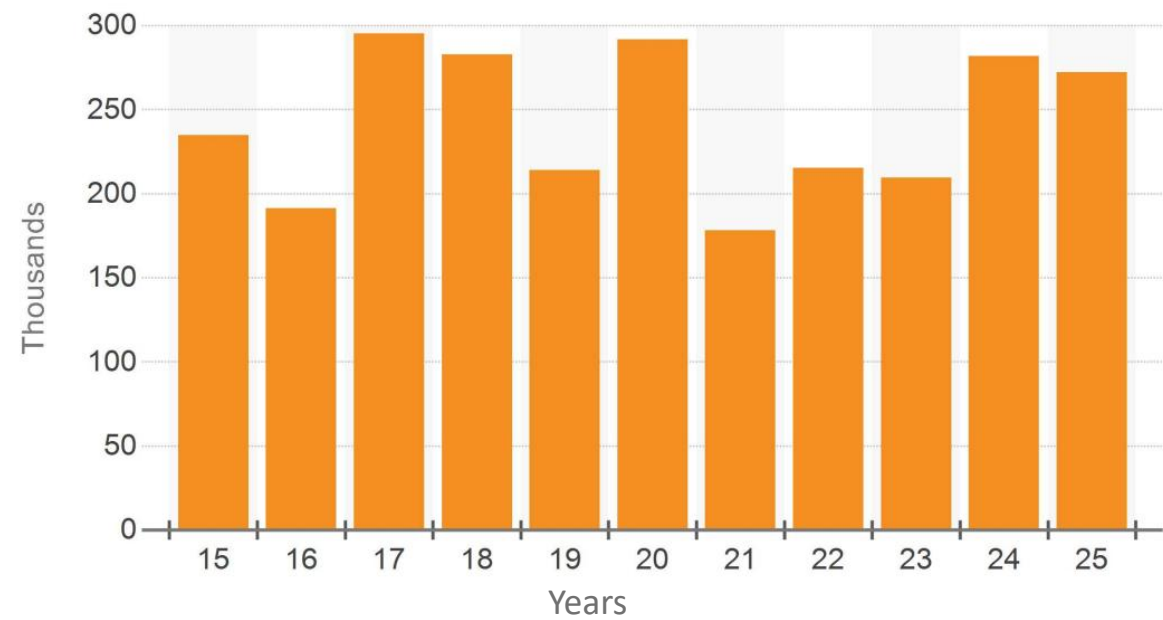
Source: CoStar, 2025

Retail provision in Swindon and Wiltshire has increased over the past ten years...

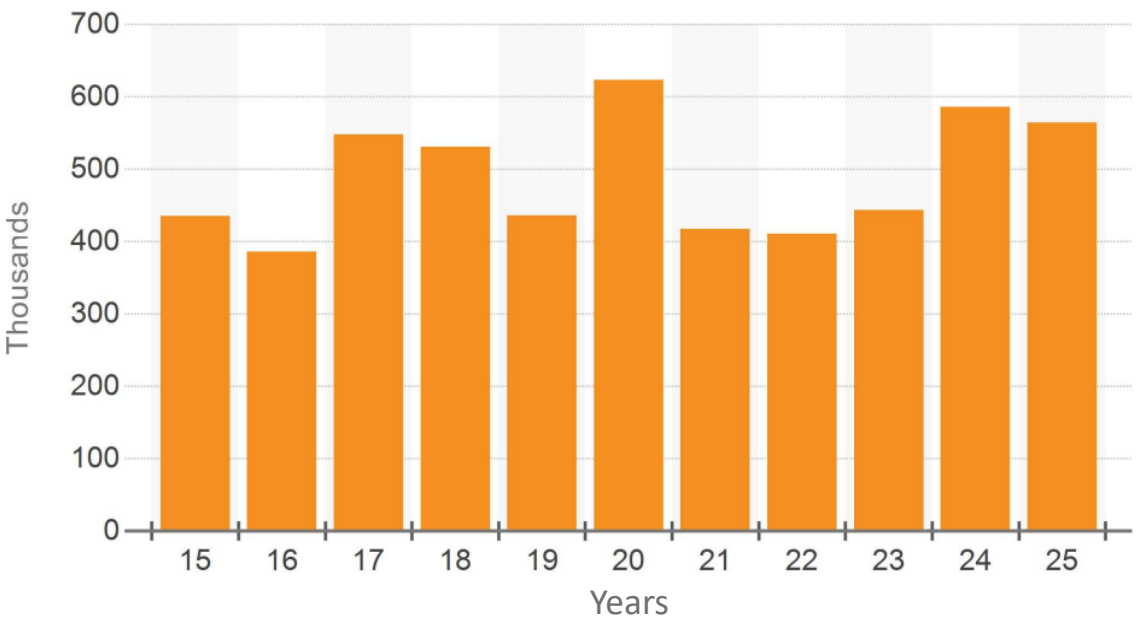
There is currently 800k sq. ft of retail floorspace in Swindon and Wiltshire, with over two thirds of the total retail stock located in Wiltshire. There is approximately 181,000 sq. ft of additional floorspace in Swindon and Wiltshire than there was 10 years ago, an additional 28%. The growth in retail floorspace has come against a backdrop of an increase in retail businesses since 2019 (4%), with hotspots of growth around central and west of Swindon, parts of Salisbury and Warminster, which could have consequences for demand for retail floorspace.

Total Retail floorspace (sq. ft) 2015-2025, thousands

Swindon



Wiltshire



Source: CoStar, 2025

Retail vacancy has increased within recent years, and rental rates have decreased...

In Swindon and Wiltshire, around 3% of retail floorspace is vacant, equivalent to around 25,089 sq. ft of retail floorspace. The rate of vacancies has been increasing since 2019, from around 0.9% to 2.7%. Due to the increase in vacancy levels, rents have decreased, potentially reflecting the lack of demand for floorspace. In 2024, the average price of retail space in Swindon and Wiltshire was £20.48, a decrease of 9% since 2015.

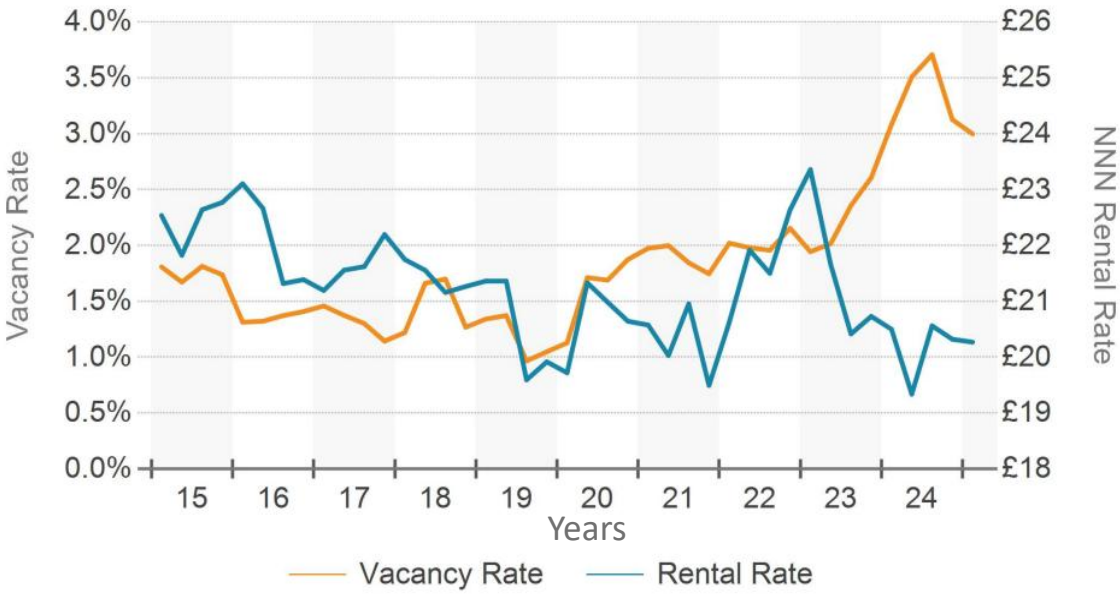
As the previous page illustrates, there has been an increase in retail floorspace. The data below shows that there has been an increase in vacancy rates, suggesting that demand for new retail floorspace has not yet materialised sufficiently to meet new supply.

Retail Property Vacancy Rates (%), and rental rates (£), 2015-2025

Swindon



Wiltshire



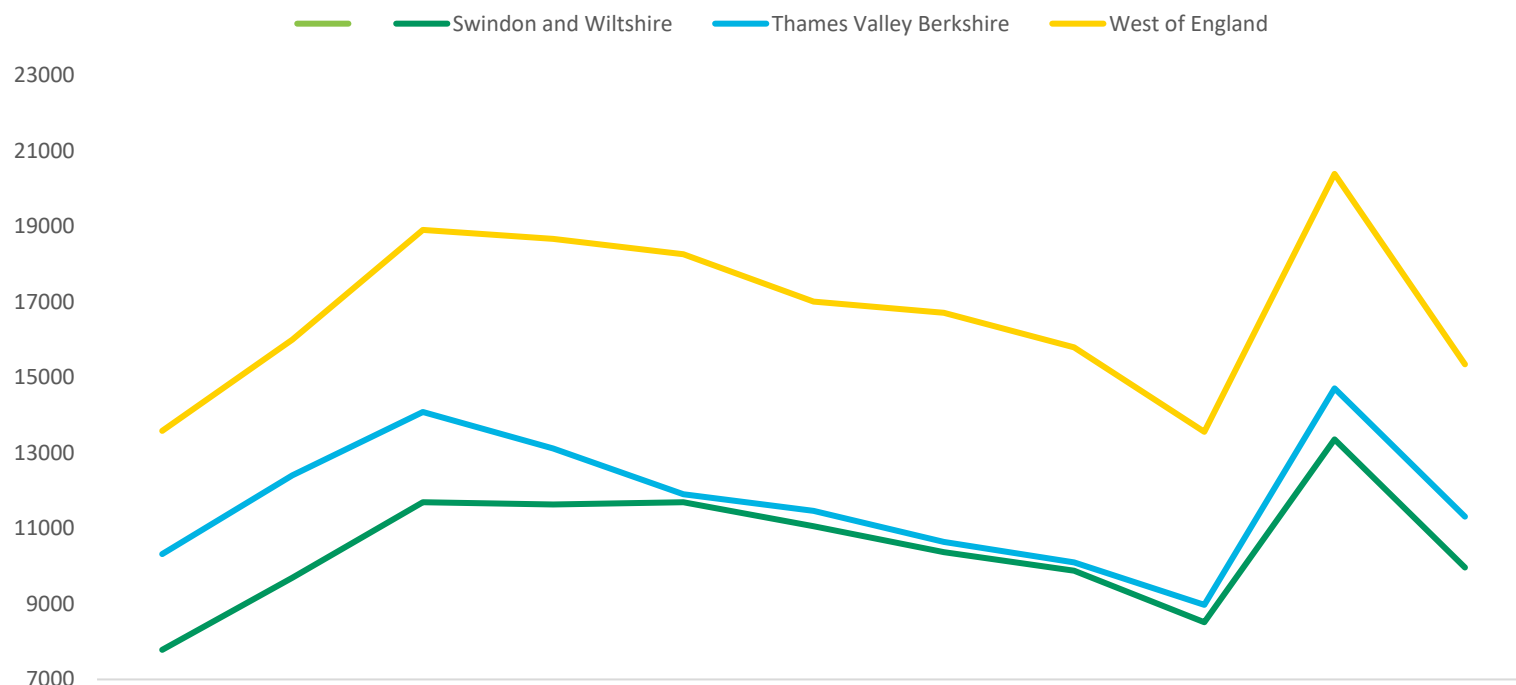
Source: CoStar, 2025

Place – Residential Property

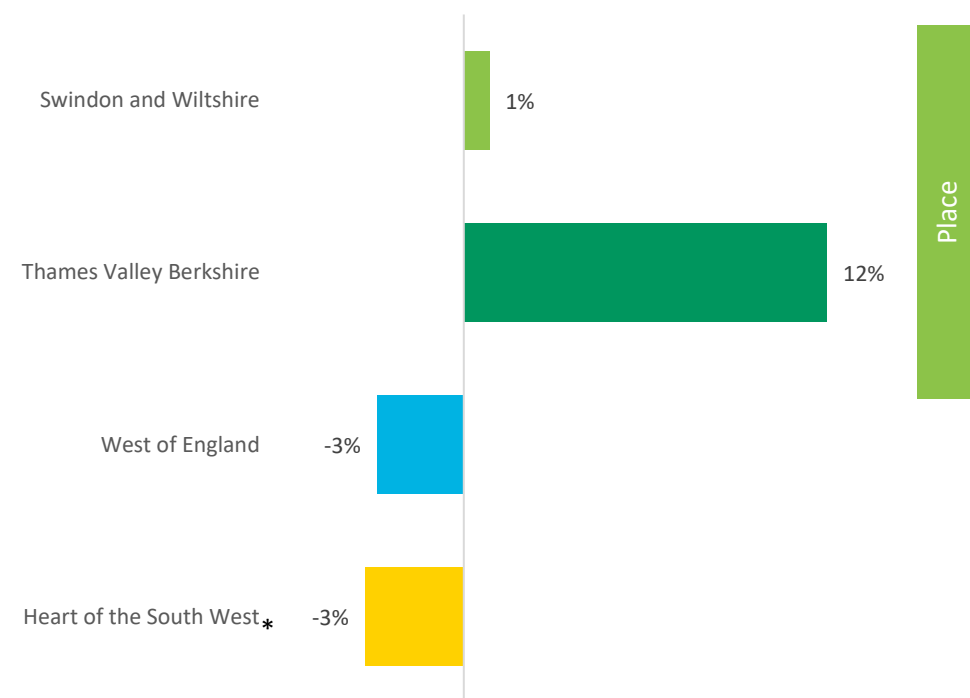
The number of residential property sales rapidly increased after the COVID lockdown but has since returned to 2020 levels...

From 2012 to 2014, the number of residential property sales in Swindon and Wiltshire* increased by 50% from 7,784 sales in 2012 to 11,697 sales in 2014. Since then, the number of property sales has decreased year on year except for 2021, where property sales increased from 8,518 in 2020 to 13,359 in 2021 (a 57% increase), likely due to unleashing pent up demand as lockdown pressures eased. The number of sales remains largely unchanged in the past 3 years in Swindon and Wiltshire, however other comparator areas have seen a decrease in sales, with the exception of Thames Valley.

Number of Residential Property Sales in Swindon and Wiltshire, Year Ending December 2012-2022



% Change in Residential Property Sales, 2019-2022



Source: ONS, Residential property sales for subnational geographies, 2022

*Data is only available at LEP and small area level, not at local authority level

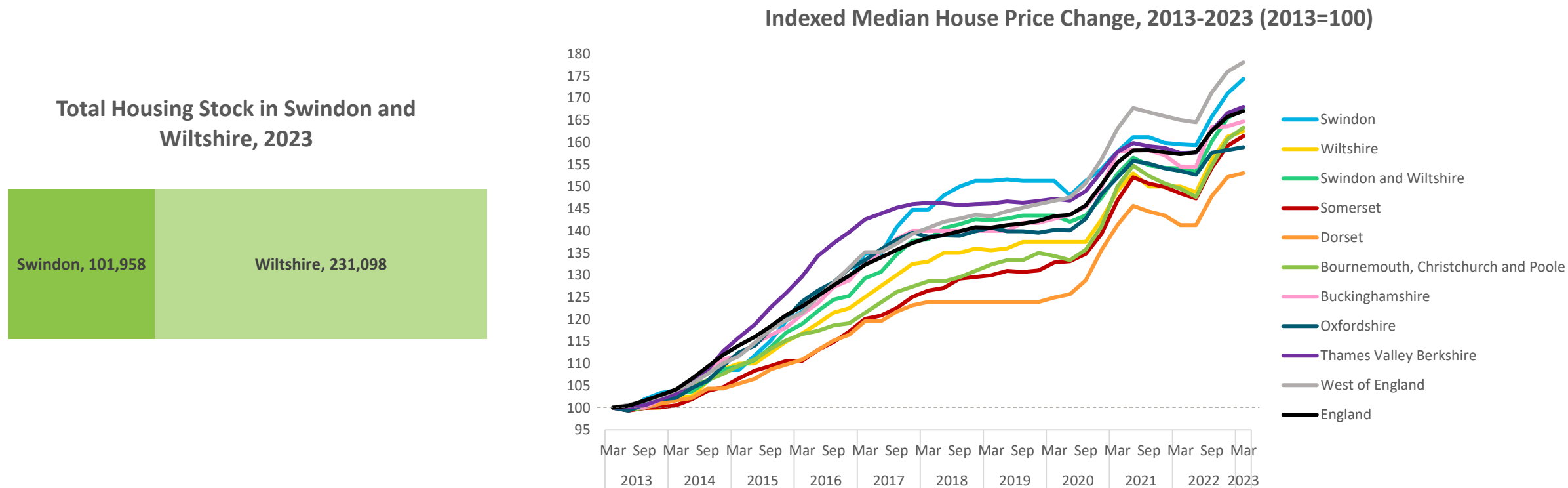
*Data for Somerset was not available, so Heart of the South West has been used as the closest match

Place – Residential Property

Increasing house prices are contributing to decreased housing affordability in Swindon and Wiltshire...

The total housing stock in Swindon and Wiltshire in 2023 was 333,056. Of the total stock, 31% is in Swindon and the remaining 69% is in Wiltshire. Growth in house prices in Swindon and Wiltshire has been rising faster than the national average. The current median house price in Swindon and Wiltshire is £295,000 compared to £327,000 nationally. Within Swindon and Wiltshire, growth in Swindon (74%) has increased more quickly than Wiltshire (63%) from 2013-2023. This equates to an average growth per year, over the last decade, of 7% in Swindon and 6% in Wiltshire, in line with the national growth rate (7%).

In Wiltshire, the median house price is £325,000 whereas in Swindon it is £265,000. Out of all the comparator areas, Swindon's house prices are growing the second fastest, behind only the West of England. Wiltshire's growth in house prices, however, is slightly below the national average.



Source: ONS Local Authority Housing Statistics data returns for 2022 to 2023; ONS Average House Price By Housing Type, 2023

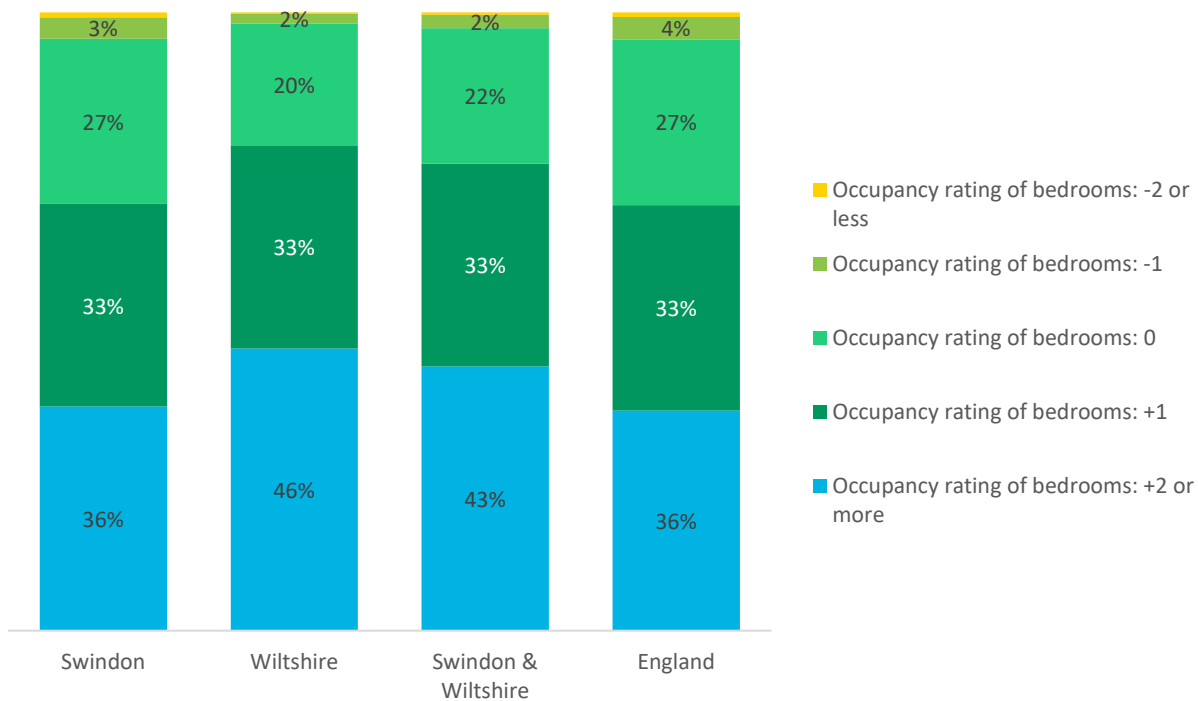
Place – Residential Property

Two thirds of households in Swindon and Wiltshire are owned, however many of these homes are under-occupied...

66% of homes in Swindon and Wiltshire are owned – 67% in Wiltshire, 64% - compared to 61% nationally. Breaking this down further, the majority of home-owners in Swindon own their home with a mortgage or loan (35% of housing tenure) with owning a home outright being more prevalent in Wiltshire, 37% of housing tenure is “owning a home outright” in Wiltshire. Individuals who rent account for 18% of housing tenure across Swindon and Wiltshire, a lower rate than seen nationally of 21%.

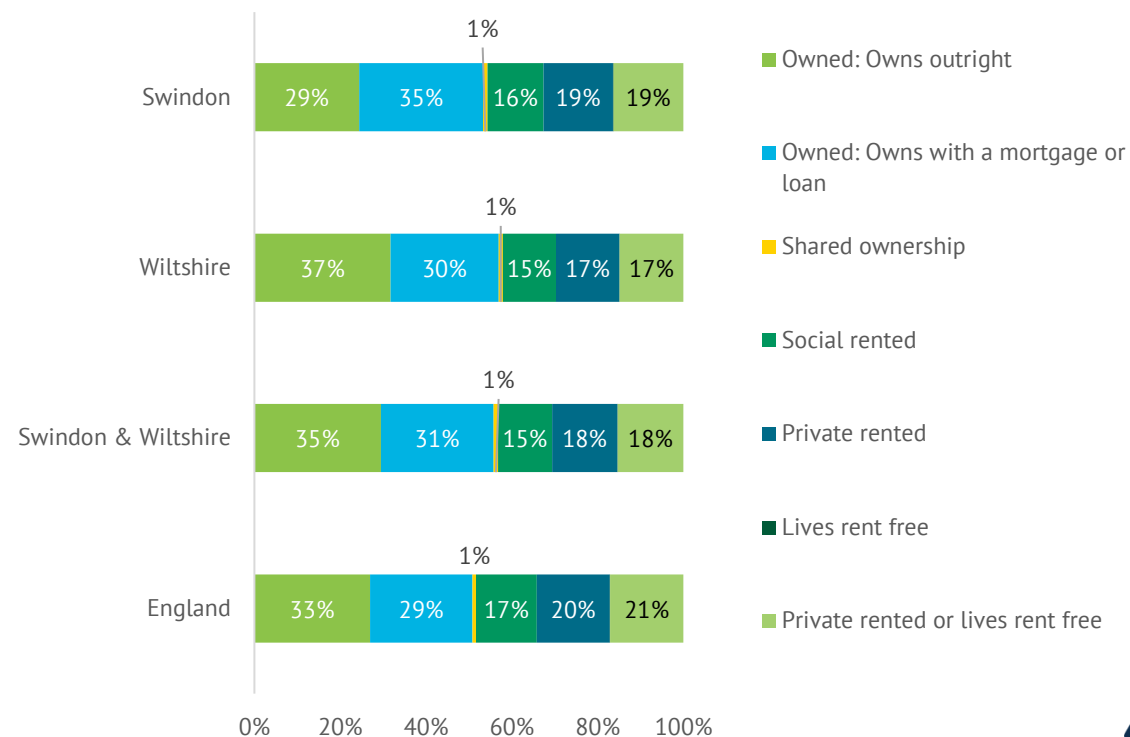
A significant proportion of homes are under-occupied. Occupancy rating calculates whether a household’s accommodation is overcrowded, ideally occupied or under occupied, by comparing the number of rooms the household requires to the number of available rooms. A rating of -1 or less implies that a household has fewer rooms than required and is overcrowded, and a rating of +1 or more implies that a household has more rooms than required and is underoccupied. 76% of homes in Swindon and Wiltshire have a rating of +1 or more, and 43% have a rating of +2 or more, making homes significantly underoccupied. Households were more likely to be underoccupied in Wiltshire (46%) than Swindon (33%).

Occupancy Rating, 2021



Source: ONS Census, 2021

Housing Tenure, 2021



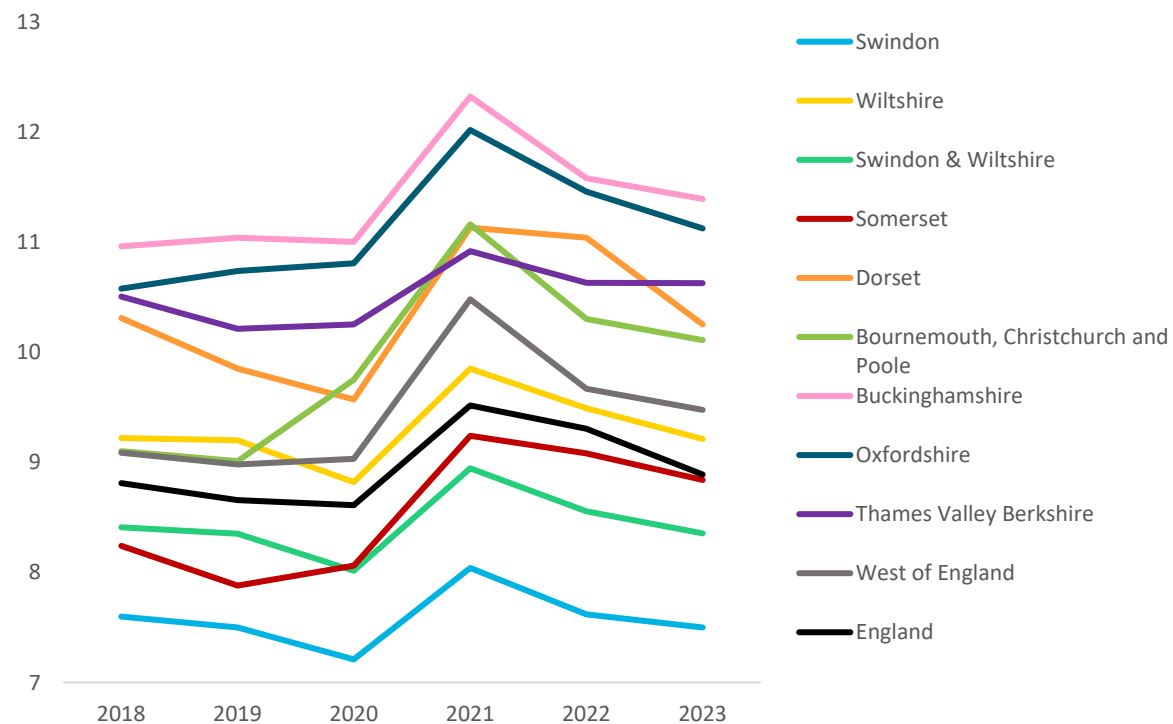
Place – Residential Property

While there are geographical disparities in house prices, renting in Swindon and Wiltshire is relatively affordable...

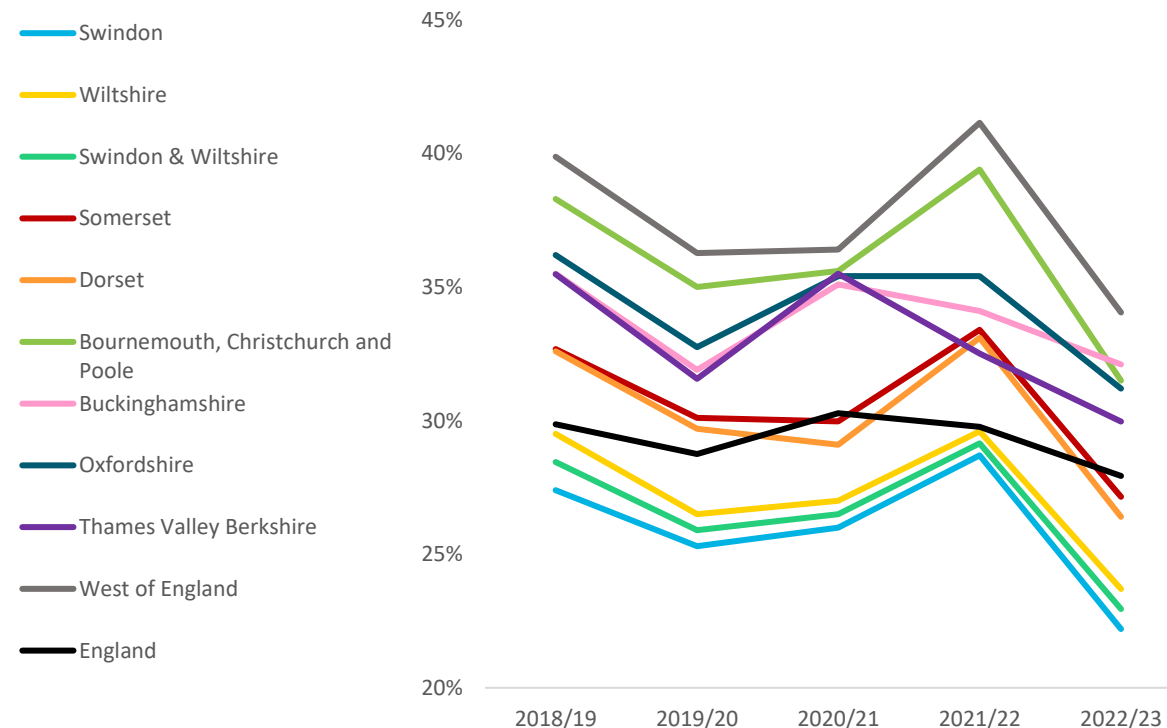
As of 2023, the housing affordability in for the combined area of Swindon and Wiltshire is in line with the national average, both at 8.4. Out of all the comparator areas, Swindon and Wiltshire has the lowest housing affordability ratio. There are some geographic disparities in the area, with housing in Wiltshire less affordable than Swindon with a ratio of 9.2 compared to 7.5 in Swindon.

The private rental affordability chart shows the proportion of income in private rentals that is equivalent to rent. The lower the percentage, the lower the proportion of income that goes towards rent. Private rentals are currently more affordable in Swindon and Wiltshire, accounting for 22% of income, than nationally (28%). The graph below suggests that in Swindon and Wiltshire, private rentals are much more affordable than other areas across the South West.

Average Housing Affordability Ratio, 2013-2023



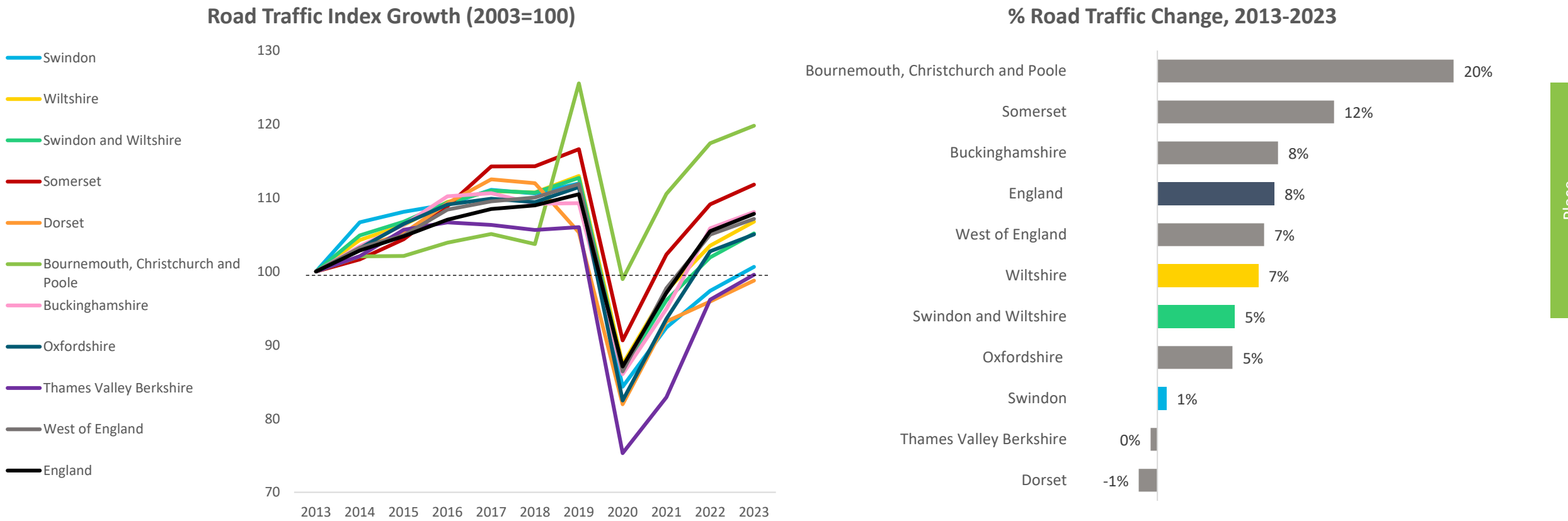
Private Rental Affordability, 2018-2023



Source: ONS Private Rental Affordability, 2023; ONS House Price to Resident-Based earnings ratio, 2023

Swindon and Wiltshire has seen a higher growth in road traffic than the national level...

Road usage has increased in Swindon and Wiltshire by 5% over the past 10 years. There has been a higher increase in Wiltshire (7%) than Swindon (1%). This is a smaller rate of growth than the national level (8%), and smaller than most comparator areas, such as Bournemouth, Christchurch and Poole (20%) and Somerset (12%). This could be due to a large number of residents using bus travel, with 58 million total bus journeys in the area in 2024. Both Swindon and Wiltshire have followed similar patterns of change, with rapid increases pre-COVID, then a sharp drop during the pandemic, and then some recovery from 2021 onwards. Both Swindon and Wiltshire have returned to pre-covid traffic levels.



Source: UK Department for Transport (2023). 'Road Traffic Statistics'. Available at [Road traffic statistics - Download data \(dft.gov.uk\)](#); GOV.UK, Passenger journeys on local bus services by local authority. Available at [Bus statistics data tables - GOV.UK](#)

Place – Infrastructure

There are 16% fewer passengers using train stations in Swindon and Wiltshire in 2023/24 compared to 2019/20 compared to 4% fewer nationally

There are 14 train stations within the Swindon and Wiltshire area, of which only one is in Swindon. Between April 2023 and March 2024, there were over 9 million rail passenger entries and exits through Swindon and Wiltshire, with the top station being Swindon (Wilts) train station. Rail travel in both areas have not caught up to pre-covid levels, in Swindon passenger numbers in 2023/24 are 24% lower than in 2019/20, in Wiltshire passenger numbers are 11% lower. At the national level there has been a stronger recovery with passenger numbers in 2023/24 only being 4% lower than in 2019/20.

Rail Passenger Entries and Exits



Entries and Exits by Station, 2019-2024

Station	Local Authority	2019	2024
Swindon	Swindon	3,713,738	2,831,130
Salisbury	Wiltshire	1,904,276	1,812,122
Chippenham	Wiltshire	1,937,240	1,578,070
Trowbridge	Wiltshire	917,458	840,926
Westbury	Wiltshire	557,756	535,644
Bradford-On-Avon	Wiltshire	550,720	486,806
Warminster	Wiltshire	355,380	331,932
Pewsey	Wiltshire	269,352	187,072
Tisbury	Wiltshire	199,464	170,286
Bedwyn	Wiltshire	129,886	93,570
Melksham	Wiltshire	75,292	63,350
Dean (Wilts)	Wiltshire	23,752	30,004
Avoncliff	Wiltshire	23,448	24,136
Dilton Marsh	Wiltshire	16,616	19,300

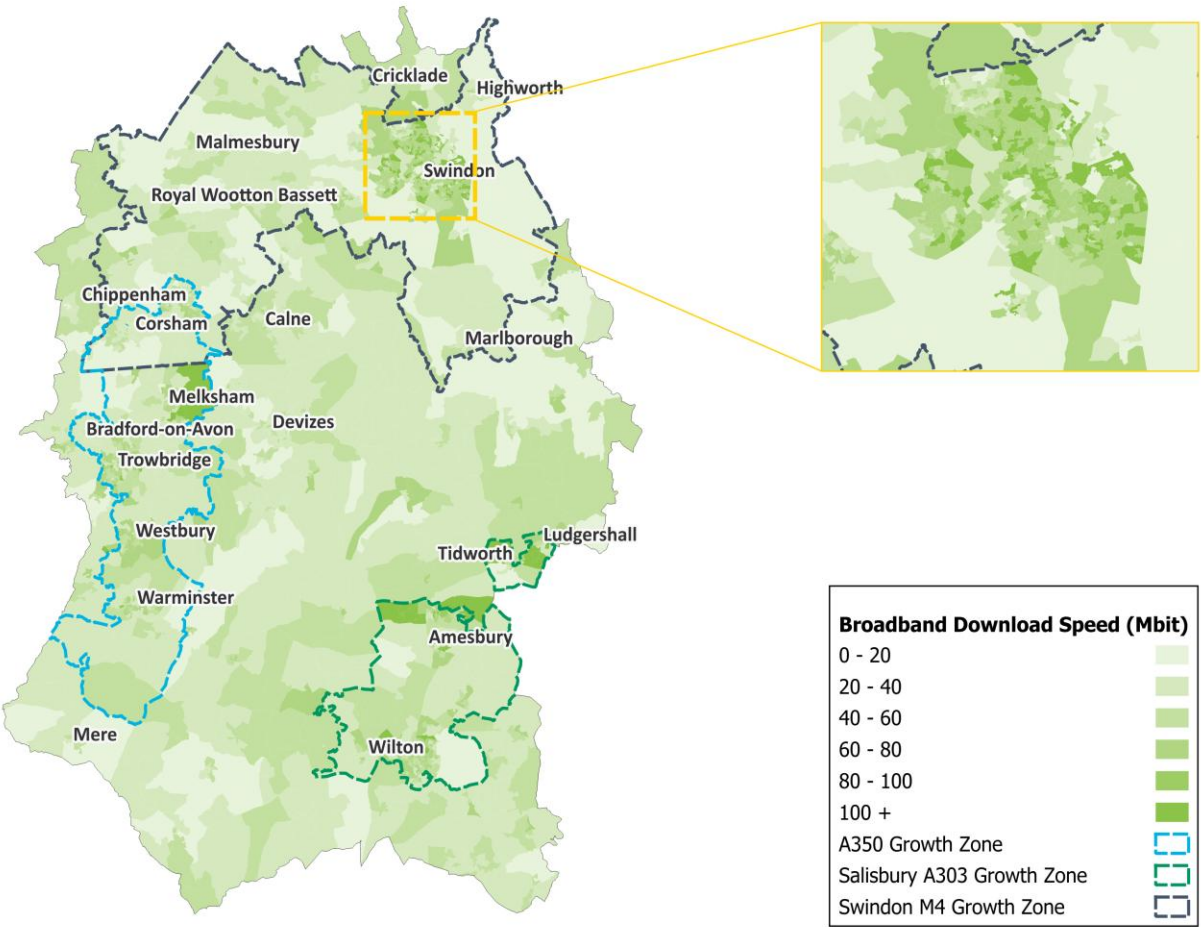
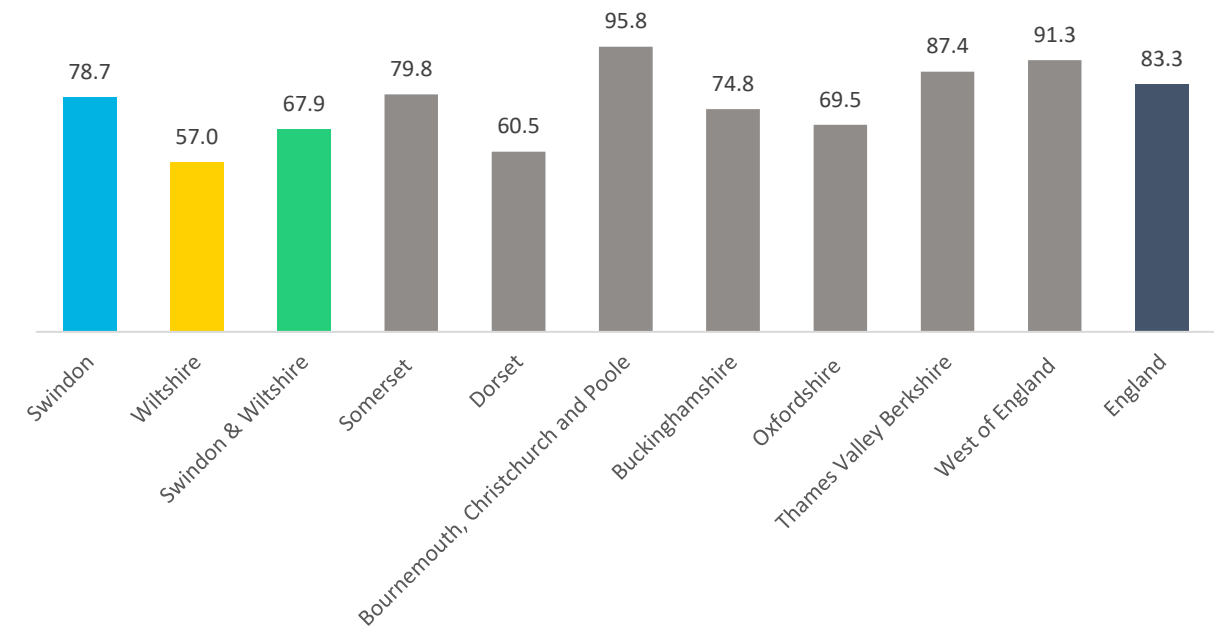
Source: Office of Rail and Road (2023). 'Estimates of Station Usage'. Available at [Estimates of station usage | ORR Data Portal](#)

5G coverage in Swindon and Wiltshire is patchy, with poorer connectivity in Wiltshire...

Confidence* in 5G geographical output in Swindon and Wiltshire is lower than the UK, at 67.9% compared to 83.3% nationally. This means that there is a 68% chance of reaching 5G output signal in Swindon and Wiltshire. However, Swindon’s 5G confidence level (78.7%) is significantly higher than Wiltshire (57%). This is likely due to Wiltshire’s rural, sparsely populated landscape.

The highest broadband download speeds in the Swindon and Wiltshire area are found within pockets of the Growth Zones. This includes Swindon, Melksham and Amesbury.

5G High Confidence Geographical Output, 2023



Source: Ofcom, 2023

*Confidence refers to the percentage of premises that are able to reach a 5G signal outdoors

Place – Environment

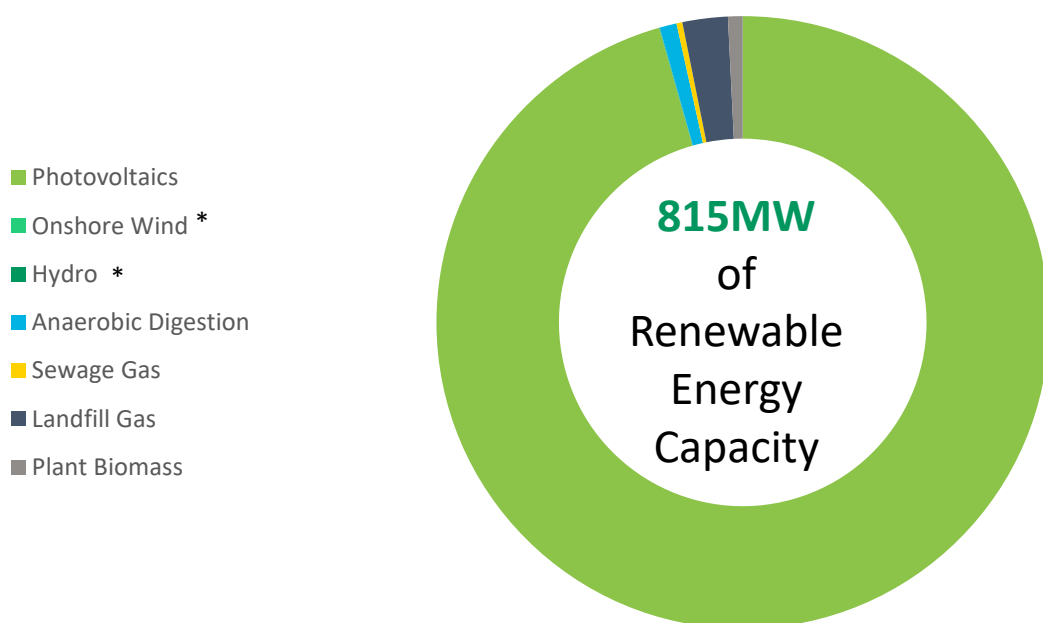
Swindon and Wiltshire is a key producer of solar energy, generating over 700,000MWh of solar power in 2023.

When looking at the capacity of renewable energy production (the installed mega watt capacity of energy production) 96% of Swindon and Wiltshire's installed renewable energy infrastructure capacity is devoted to solar energy production, underscoring the importance of solar energy to Swindon and Wiltshire's energy ecosystem. In 2023, Swindon and Wiltshire generated 793,000MWh of renewable energy (generation meaning, 6% less than in 2018. 75% of this energy was generated in Wiltshire, and the other 25% was generated in Swindon.

The majority of this renewable energy (90%) is photovoltaic energy (solar energy). Other renewable energy sources still account for a reasonable share of energy generation in the area, such as Landfill gas and anaerobic digestion, though these have been gradually producing less energy over the past five years. Landfill Gas generation has halved over the past 5 years.

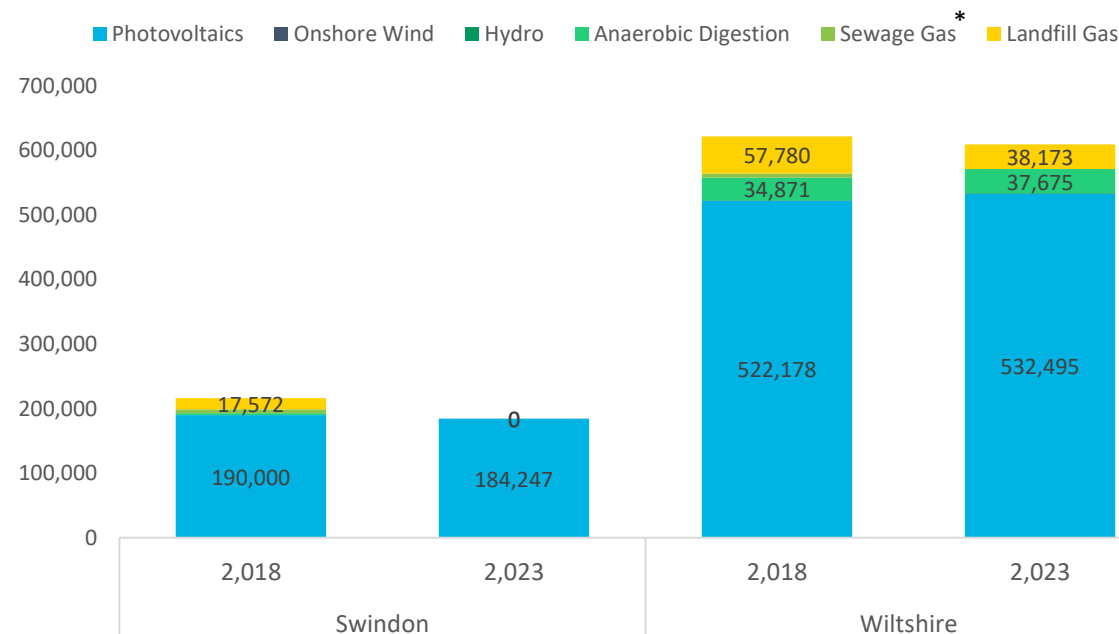
Capacity is different to renewable energy production in that it refers to the maximum power the area can produce and is expressed in megawatts (MW), but the total electricity they actually generate over time is expressed in megawatt hours (MWh). Therefore, Swindon and Wiltshire has more capacity for renewable energy power than it is currently using.

Installed Renewable Energy Capacity in Swindon and Wiltshire, 2023



*Note that Onshore Wind and Hydro have values of less than 1%, so are not visible in this chart

Renewable Energy Generation (MWh) in Swindon and Wiltshire, 2018-2023



*Sewage gas emissions for 2023 were unavailable as the data has been suppressed to prevent the output of individual plants being released

Source: BEIS, Regional Renewable Energy Statistics, 2023

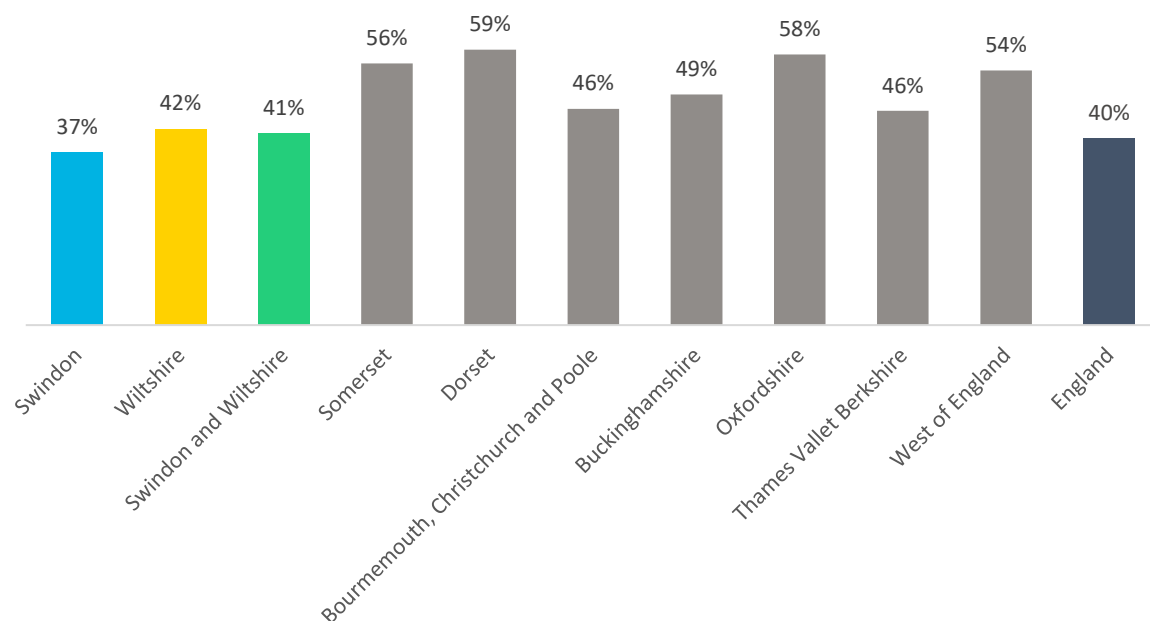
Place – Environment

Recycling rates in Swindon and Wiltshire are in line with the national average...

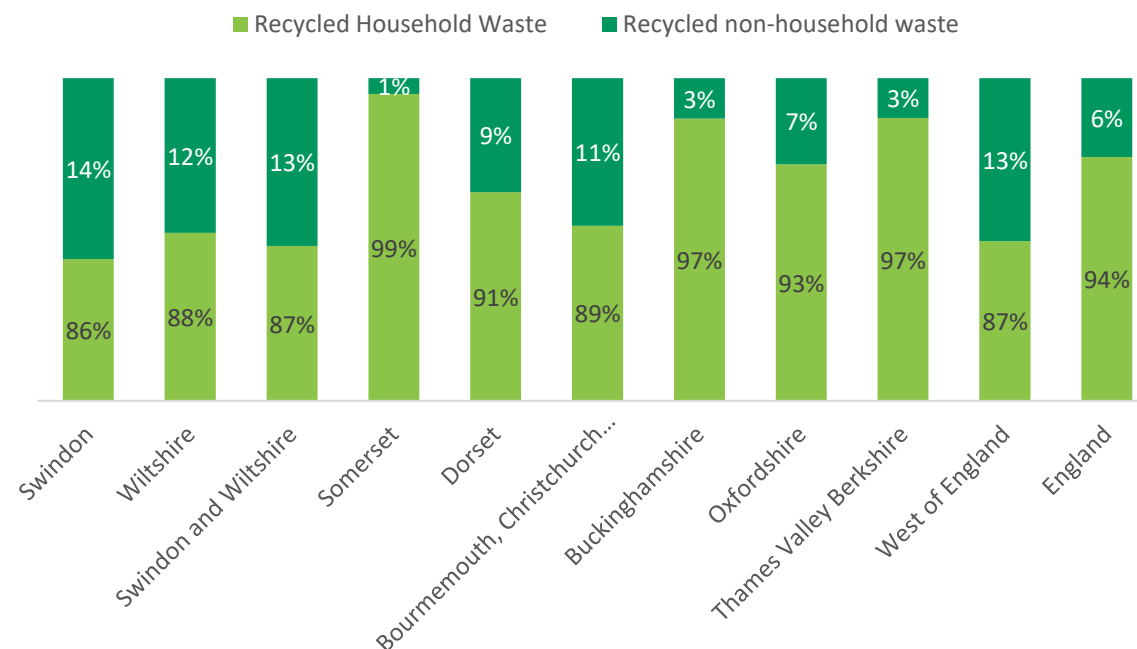
In Swindon and Wiltshire, the recycling rate is 41%, 1pp more than the national average. Within the area, Wiltshire has higher rates of recycling at 42% compared to just 37% in Swindon. The majority of waste in both local authorities is produced by households (94% in Swindon and 93% in Wiltshire). However, compared to elsewhere in the South West, recycling rates are fairly low. For example, nearby Dorset recycles 59% of waste.

Of the waste that is recycled, most of it is household waste. Of the 41% of waste that is recycled in Swindon and Wiltshire, 87% is household waste and 13% of it is non-household waste. A slightly higher proportion of recycled waste is household waste in Wiltshire (88%). High rates of recycling both household and non-household waste reduce an area's contribution to environmental degradation.

Total Recycling Rate, 2022/23



% of Total Waste Recycled by Household/ Non-Household, 2022/23

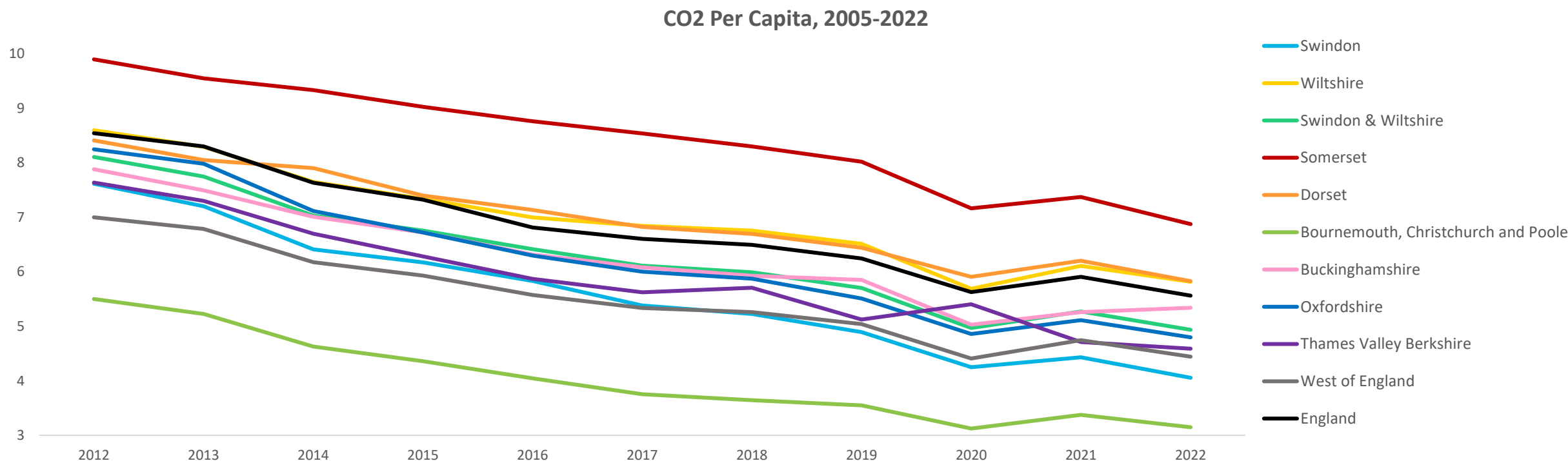


Source: DEFRA Local authority collected waste, 2023

Place – Environment

Over the last decade, total CO2 produced in Swindon and Wiltshire has fallen by nearly a third...

Swindon and Wiltshire produces nearly 4kt of CO2 per year, lower than the national CO2 per capita emissions (5.5kt). This has fallen by 31% since 2012, compared to a 35% reduction in England. The trend away from carbon has been particularly strong in Swindon, where rates per capita have been consistently below the national average for over a decade. Wiltshire, on the other hand, has generally been above the national rate per capita.. Compared to other nearby areas, Swindon and Wiltshire performs average. All of the comparator areas have seen declines in CO2 per capita over the past 17 years.



Source : UK local authority and regional carbon dioxide emissions national statistics: 2005-2019, Dept of Business Energy and Industrial Strategy

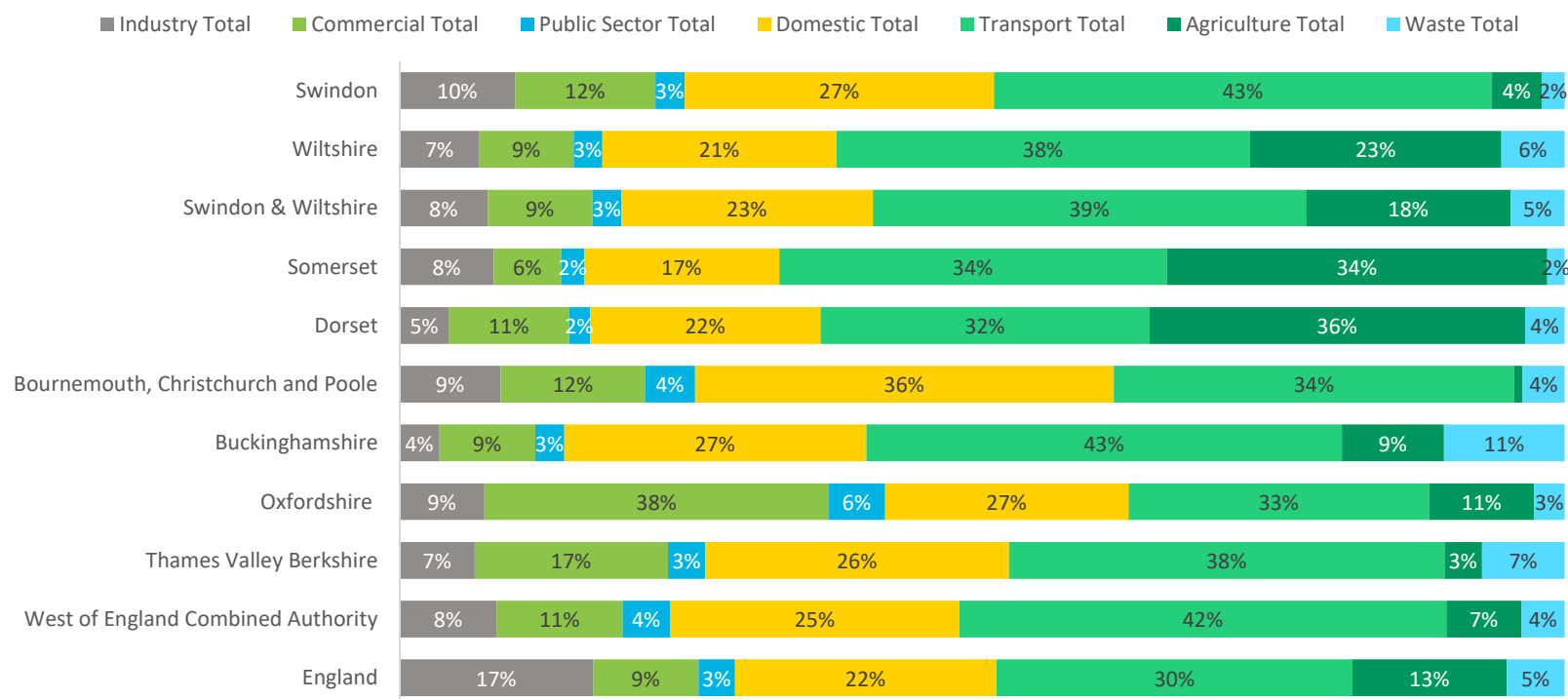
Place – Environment

Transport emissions are the biggest contributor to total CO2 produced in Swindon and Wiltshire...

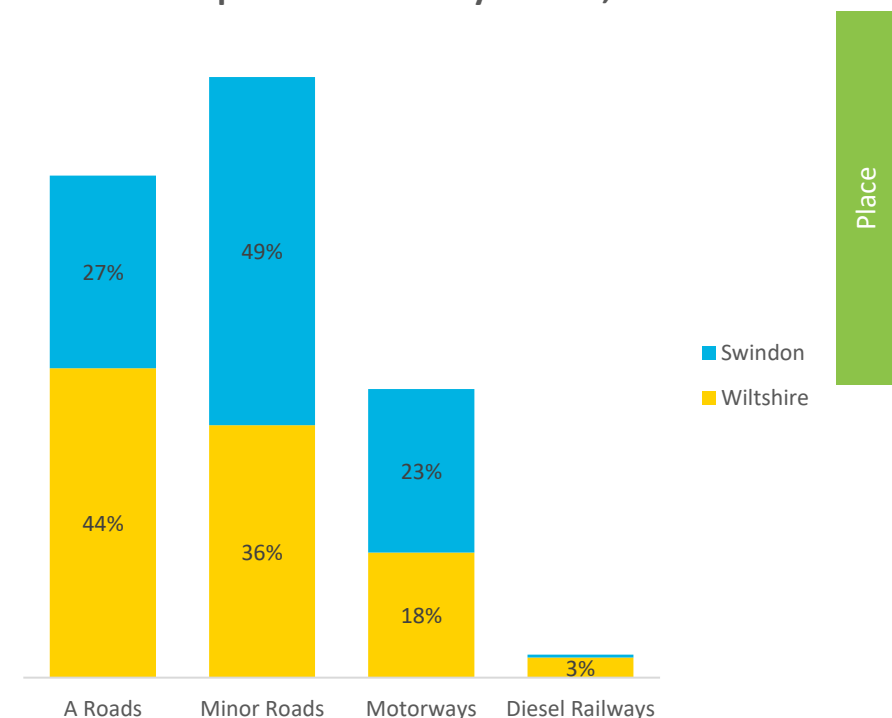
Whilst transport emissions make up the largest component of both Swindon and Wiltshire's CO2 emissions, it is much higher in Swindon (43%) than Wiltshire (38%). BEIS data also allows analysis of the main sources of transport emissions in Swindon and Wiltshire. This shows that both A Roads and minor roads make up four fifths of all transport emissions in the area. This could be because small, rural roads may become congested very easily, making journeys longer and therefore increasing emissions.

The need to reduce CO2 emissions will help drive Swindon and Wiltshire as a leading low carbon economy. Finding innovative solutions to reducing transport emissions will support net zero aspirations. Sustainable transport options include electric vehicles and more accessible and greener public transport solutions.

CO2t Emissions by Source, 2022



Transport Emissions by Source, 2022



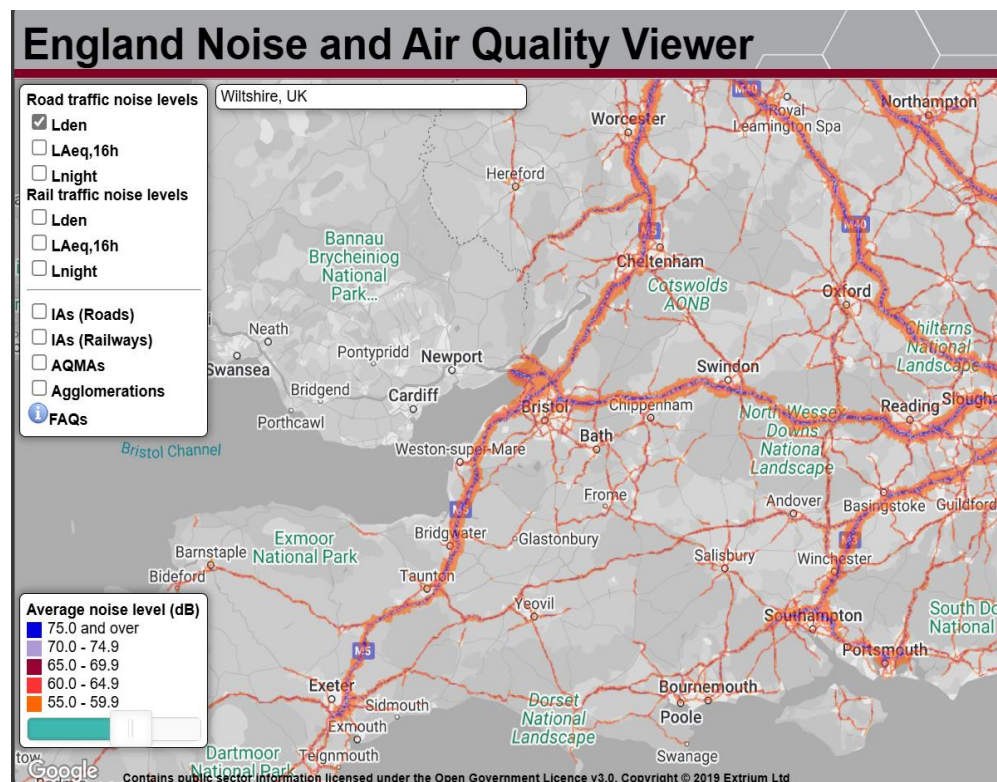
Source: UK local authority and regional carbon dioxide emissions national statistics: 2005-2022, Dept of Business Energy and Industrial Strategy

Place – Environment

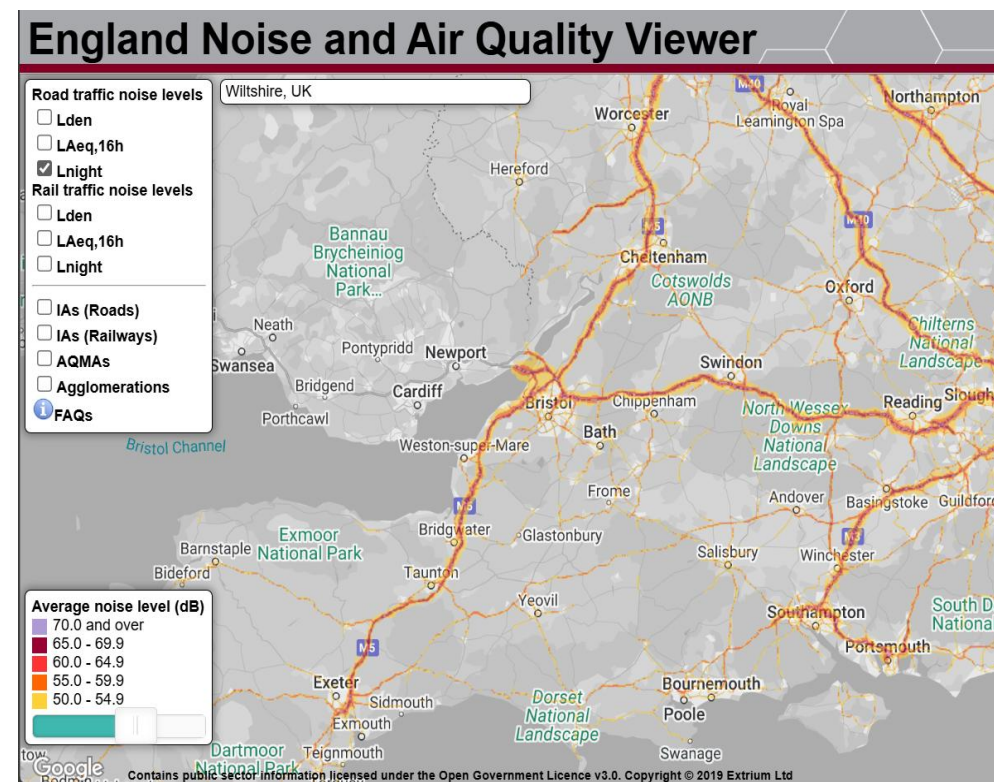
There are clear pockets of high noise pollution in Swindon and Wiltshire which are likely to affect health and quality of life...

High levels of noise exposure can have several impacts on health, such as impacts on sleep and hypertension. These can in turn affect the quality of life for both residents and workers, with knock-on effects to wider productivity and health costs. Within the Swindon and Wiltshire area, there are clear pockets of noise pollution around motorways and artillery roads (though not exclusively) where noise levels are high both during the day and night. The maps below highlight where the highest 1% of noise levels at residential locations are.

Lden1 noise levels (dB) in Swindon and Wiltshire



Lnight noise levels (dB) in Swindon and Wiltshire



Source: Extrium, Google Maps, based on DEFRA data

1 Lden (day-evening-night) - a 24-hour annual average noise level in decibels with weightings applied for the evening and night periods. Lnight - the nighttime annual average noise level (in dB) where night is defined as 2300-0700

Place – Policy Implications

The Economic Strategy for Swindon and Wiltshire 2024-2036 emphasises the importance to develop, renew and regenerate key settlements across the two local authorities, while also emphasising green growth. The availability of affordable and quality commercial space (industrial, retail and office) is crucial to the economic success of Swindon and Wiltshire. Across both areas, there has been an increase in rental values for all types of commercial property in both local authorities. To allow for businesses to stay, grow and be attracted into Swindon and Wiltshire there is a need to ensure commercial property rental rates remain competitive with neighbouring areas.

Carbon emissions (per capita) have been falling in Swindon and Wiltshire, in line with ambitions in local, regional and national policies emphasising the net-zero agenda. Relative to the national position, there is a higher proportion of CO2 resulting from transport, continuing the policy need to decarbonise the transport network where feasible.

In Wiltshire, the median house price is £325,000 whereas in Swindon it is £265,000, significantly cheaper than the national figure of £327,000. However, to maintain this level of affordability focus will be needed on building homes while also supporting growth in earnings and income for potential buyers.



7. Future trends and macroeconomic landscape

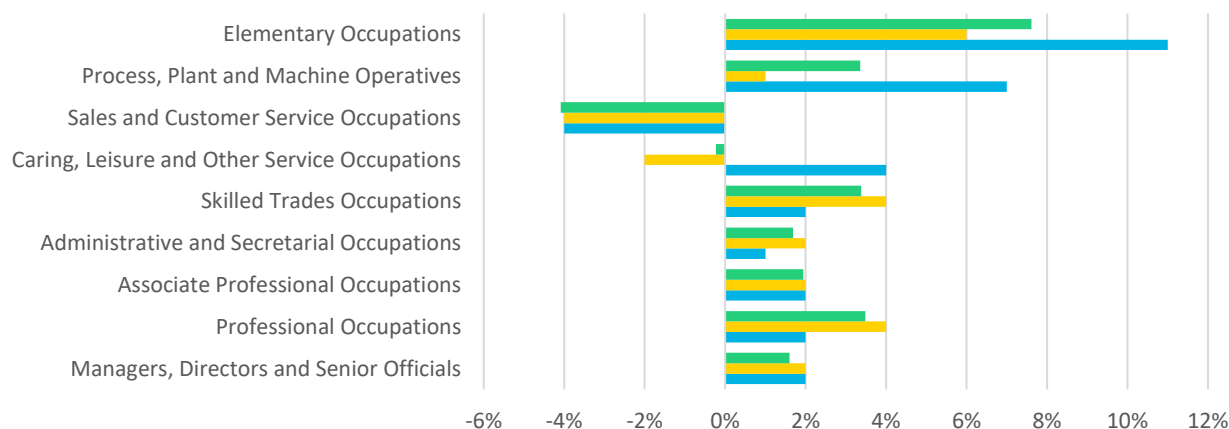
Future Trends – Labour Market Projections

The number of jobs is expected to increase in Swindon and Wiltshire, with the most growth being seen in elementary and professional occupations...

According to Lightcast data, the number of jobs in Swindon and Wiltshire is projected to grow by 3%, adding 8,443 jobs by 2033 compared to a 2023 baseline. Swindon will account for 41% (3,489 jobs) of this increase, with the remaining 59% (4,954 jobs) in Wiltshire. The largest growth is expected in Water Supply; Sewerage, Waste Management and Remediation Activities (+18%/+741 jobs) and the Arts, Entertainment and Recreation industry (+18%/+1,535 jobs). However, the Information and Communication sector is set to decline by 15% (-1,182 jobs), while Wholesale and Retail Trade is projected to fall by 10% (-4,332 jobs). In terms of occupations, Professional and Elementary roles are expected to see the most growth by 2033, with Professional occupations increasing by 3% and Elementary occupations by 8%. Meanwhile, sales and customer service occupations are projected to decline by 4% in the next few years.

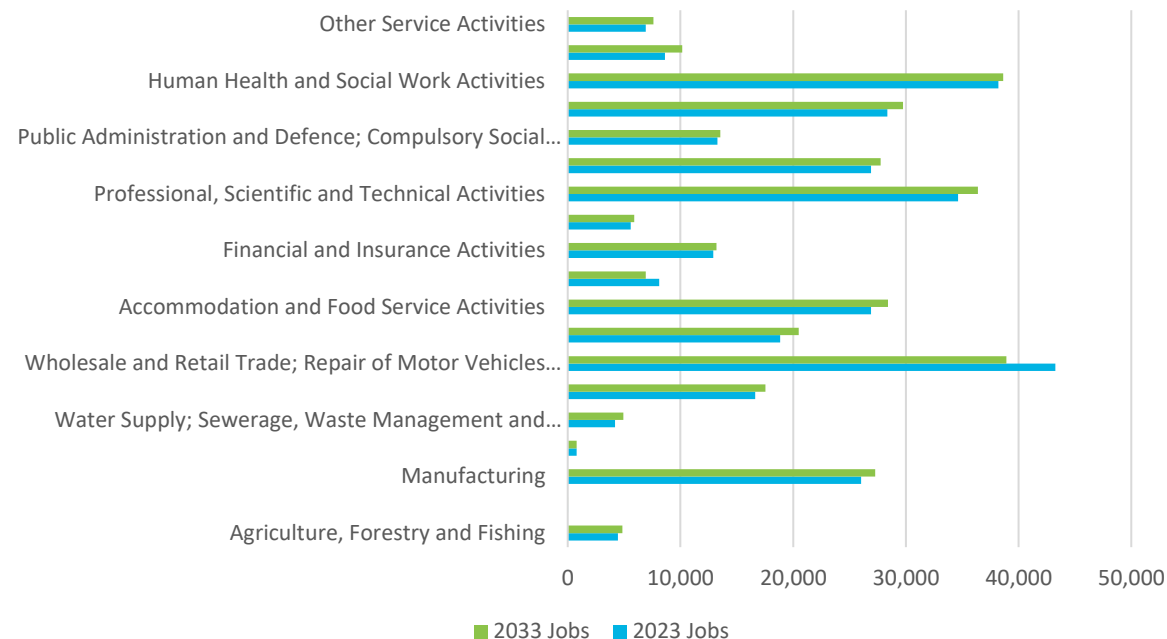
The projected decline in caring, leisure, and other services (SOC) jobs contrasts with the expected rise in human health and social work employment, challenging assumptions linked to the area's aging population. This likely reflects definitional differences, as the sector covers a broad range of roles, while the occupation group focuses on frontline care. The trend may signal a shift toward more specialised roles, automation reducing lower-skilled jobs, or changes in how care services are delivered.

Percentage Change in Occupations, 2023-2033

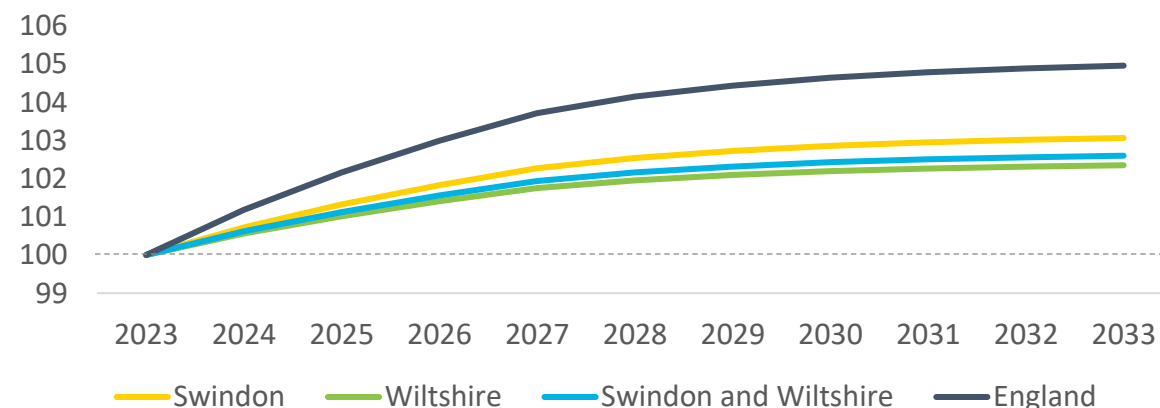


Source: Lightcast, 2024 ■ Swindon and Wiltshire ■ Wiltshire ■ Swindon

Swindon and Wiltshire Projected Jobs Growth, 2023-2033



Projected Indexed Growth in Jobs, 2023-2033 (2023=100)



Future Trends and Macroeconomic Landscape – Housing Need

The 2024 Local Housing Needs Assessment (LHNA) Review updates the projected housing need across Wiltshire's four Housing Market Areas (HMAs) for the 2020–2038 period. Compared to the 2022 LHNA Update, the revised assessment identifies a lower overall housing requirement, with total dwellings needed reducing from 36,738 to 34,505 by 2038 and annual Local Housing Need (LHN) falling from 2,041 to 1,917 dwellings per year.

This decline in housing need can primarily be attributed to updated demographic modelling, particularly the incorporation of 2021 Census data, which provides a more accurate population base for forecasting.

The updated housing need figures provide a more accurate basis for planning future development. The lower LHN suggests a slightly reduced pressure to allocate new housing land compared to previous estimates. However, maintaining an adequate supply of land remains critical to meeting demand, supporting economic growth, and addressing affordability challenges. Future housing need will revolve around specific population needs, with an anticipated rise in older residents the need for housing will need to be more targeted to this cohort i.e. more accessible provision, suitably sized and located.

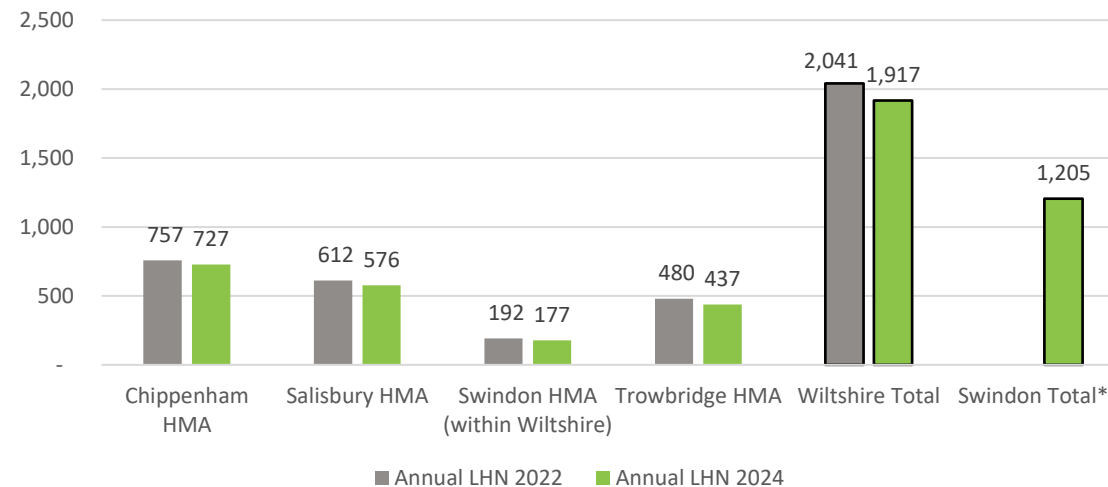
Figures for Swindon are only available from 2024 estimates and cover a slightly different period to Wiltshire – 2023-2043. It is estimated Swindon will have a need of 24,100 new houses in this twenty-year period. As such an estimate of 1,205 houses per year can be roughly calculated for Swindon.

Source: Wiltshire Local Housing Needs Assessment Review of Local Housing Need, September 2024, Opinion Research Services

*Swindon LHN estimates for period 2023-2043

**Swindon annual need estimated by dividing total need for 2023-2043 by 10

Annual Local Housing Need (dwellings) 2022 LHN and 2024 LHN Update



Total Dwellings Needed, Wiltshire and Wiltshire HMAs – 2022 and 2024

Housing Market Area	2022 LHN Total Dwellings (2020-38)	2024 LHN Total Dwellings (2020-38)	Variance between 2022 and 2024 LHN Estimates
Chippenham HMA	13,626	13,080	-546
Salisbury HMA	11,016	10,364	-652
Swindon HMA (within Wiltshire)	3,456	3,187	-269
Trowbridge HMA	8,640	7,873	-767
Wiltshire Total	36,738	34,505	-2,233
Swindon Total	-	24,100*	-

Future Trends and Macroeconomic Landscape – Wiltshire Employment Land

The 2023 Employment Land Review Update, commissioned to inform Wiltshire Council's Local Plan, provides a detailed assessment of future employment land needs from 2020 to 2038. Drawing on multiple data sources—including historical trends in employment land gains and losses (2010–2019) and economic forecasts from Cambridge Econometrics (CE) and Oxford Economics (OE)—the report sets out a range of demand projections.

Under the central economic forecast, employment land demand is estimated to range between 94 ha and 120 ha over the Local Plan period. Over 70% of this demand is for industrial development, including logistics, with the remainder allocated to office and R&D space.

An alternative version of this scenario accounts for a potential decline in office space demand. In this case, overall employment land requirements are slightly lower, at 87 ha to 104 ha, while industrial demand remains consistent at 76 ha.

A higher growth scenario, which assumes stronger economic expansion, projects an increased employment land demand of 118 ha to 147 ha. This reflects a more ambitious outlook, requiring additional office and industrial space. A variation of this scenario, factoring in a potential decline in office demand, reduces overall requirements slightly to 111 ha to 131 ha, though industrial land demand remains stable at 98 ha.

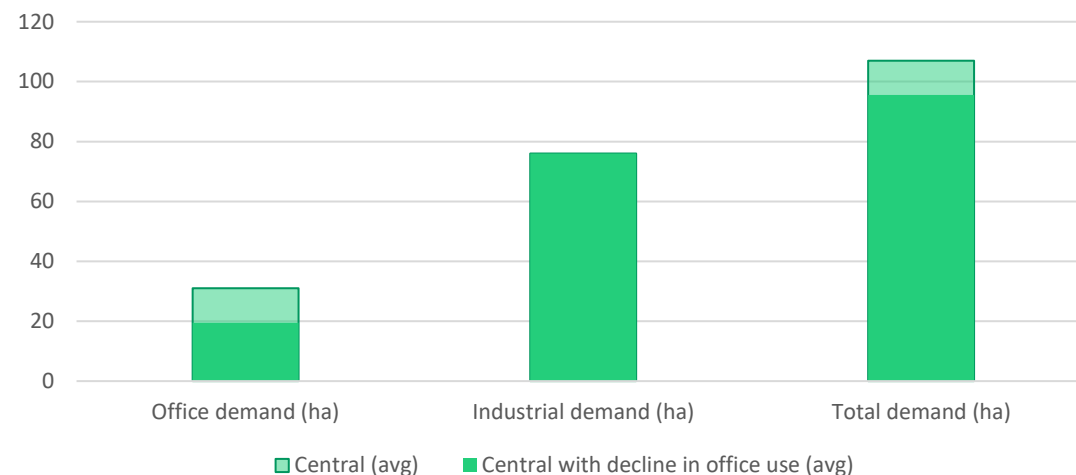
Demand for commercial space is a reasonable indicator of an area's economic vibrancy. If this demand is not sufficiently met by the supply of suitable employment land, growth may be jeopardised, and businesses may look elsewhere for premises that meet their needs. Ensuring an adequate supply of land—particularly for industrial and logistics uses—is critical to supporting local employment, attracting investment, and maintaining Wiltshire's competitive position in the wider regional economy.

Source: Wiltshire Employment Land Review Update, 2024, Hardisty Jones Associates

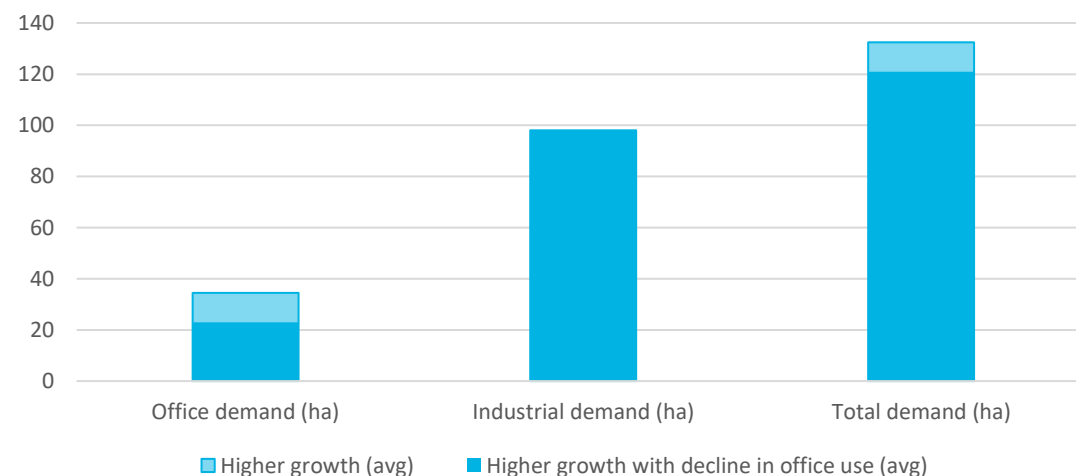
Employment Land Scenarios 2020-2038

(lower estimates shown in darker colour, higher estimates shown in lighter colours)

Central Scenario



Higher Growth Scenario



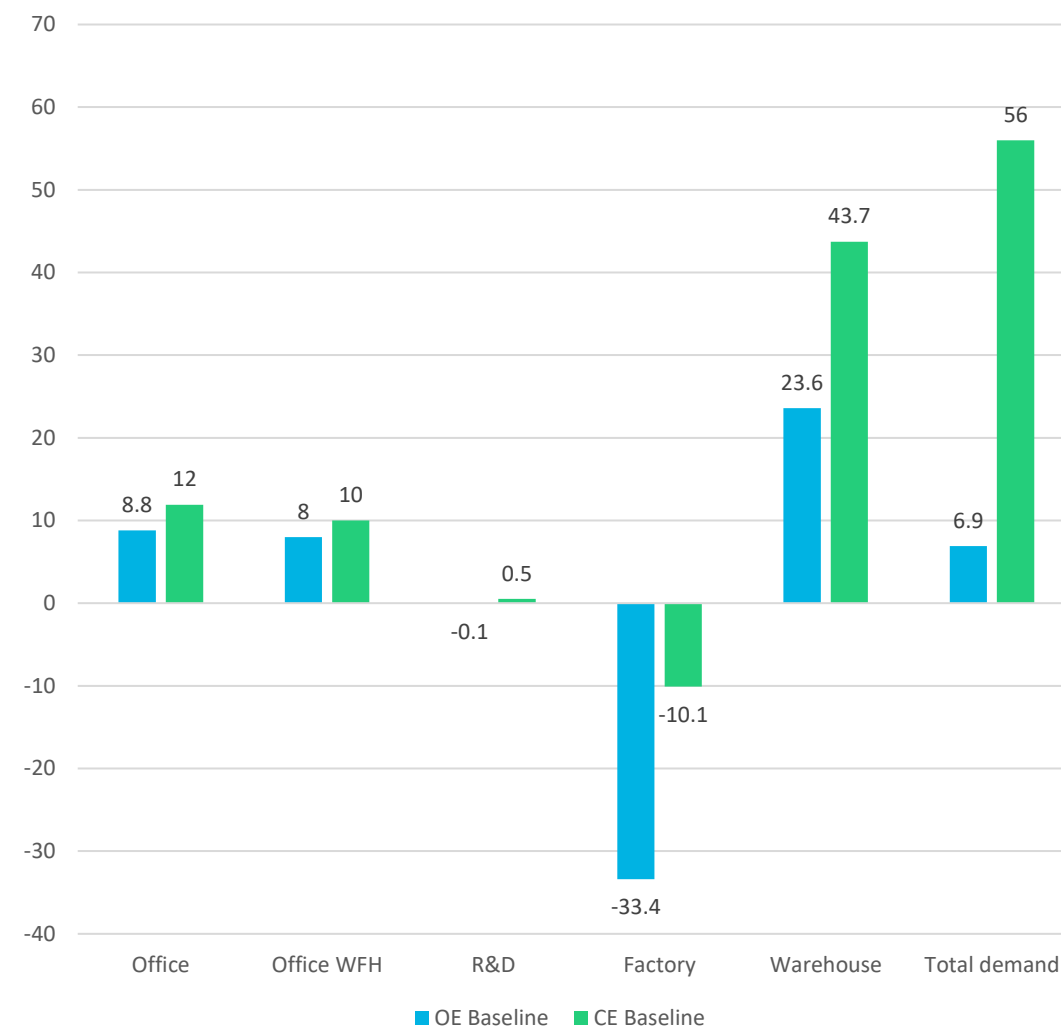
Future Trends and Macroeconomic Landscape – Swindon Employment Land

The Swindon Employment Needs and Land Supply study seeks to outline future employment land need for the local authority through to 2043. The report models several projections for employment land scenarios in Swindon, utilising forecasts from Oxford Economics (OE) and Cambridge Econometrics (CE).

Overall, there is a large variance between the two projections, with OE estimating a lower net demand for employment land compared to CE. A key area of difference is in factory space, where OE projects a significant decline of -33.4 hectares, while CE anticipates a much smaller contraction of -10.1 hectares. In contrast, warehouse demand is forecast to grow substantially under both models, with CE estimating an increase of 43.7 hectares and OE predicting a more modest 23.6 hectares. Office and office WFH (work-from-home) demand show moderate growth in both models, with CE slightly higher in each category. R&D demand is projected to remain relatively stable, with CE forecasting a minor increase of 0.5 hectares and OE predicting a negligible decline of -0.1 hectares.

The total employment land demand reflects the overall divergence between the two models, with OE estimating a net requirement of just 6.9 hectares, while CE suggests a far higher need of 56 hectares. This wide range highlights the uncertainty in future employment land needs and underscores the importance of considering multiple scenarios when planning for Swindon's economic future.

Employment Land Scenarios 2023-2043* (Ha)



*Includes margin and replacement demand

Source: Draft Swindon Employment Needs and Land Supply Study, Icenj, 2024

Future Trends and Macroeconomic Landscape – Changing Global Trade

The trade landscape for Swindon and Wiltshire continues to evolve, shaped by post-Brexit adjustments, shifting global trade relationships, and potential external disruptions. While the region remains a net importer of goods and a net exporter of services, its reliance on non-EU markets has been growing. In 2022, non-EU exports accounted for 66% of total exports, compared to 34% for the EU. Imports also leaned slightly towards non-EU countries, comprising 52% of total imports.

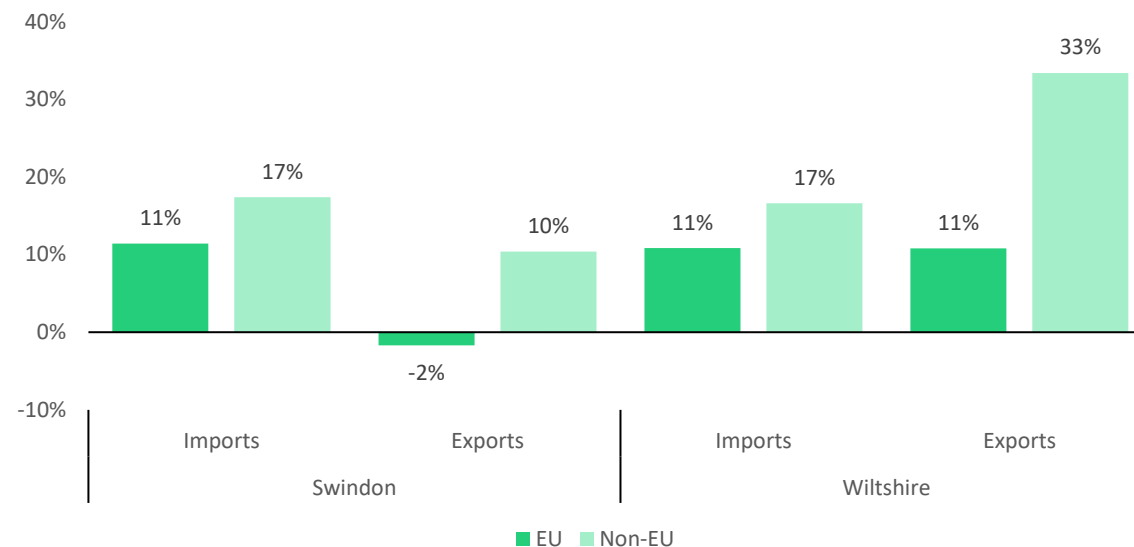
This trade structure suggests that Swindon and Wiltshire have developed resilience in the wake of EU exit. However, while non-EU trade has expanded, Brexit-related frictions have continued to impact the ease of trading with the EU. Between 2019 and 2022, exports from Swindon and Wiltshire rose by 13%, and imports by 14%, largely driven by trade with non-EU countries, where exports increased by 17% and imports by 18%. The pace of recovery, however, has not been uniform, with some sectors still facing logistical and regulatory challenges.

Looking ahead, trade uncertainties persist, particularly concerning the UK's future relationship with the United States. The US has become an increasingly significant trade partner for the south west of England, with exports rising from £2.5bn in 2014 to £4.2bn in 2023—a 68% increase over the past decade. Machinery and transport equipment account for over half of all south west–US exports, making the sector particularly vulnerable to potential US tariff changes. Should sector-specific tariffs be imposed, approximately £700m of quarterly export value could be at risk, presenting a significant challenge for businesses reliant on this trade relationship.

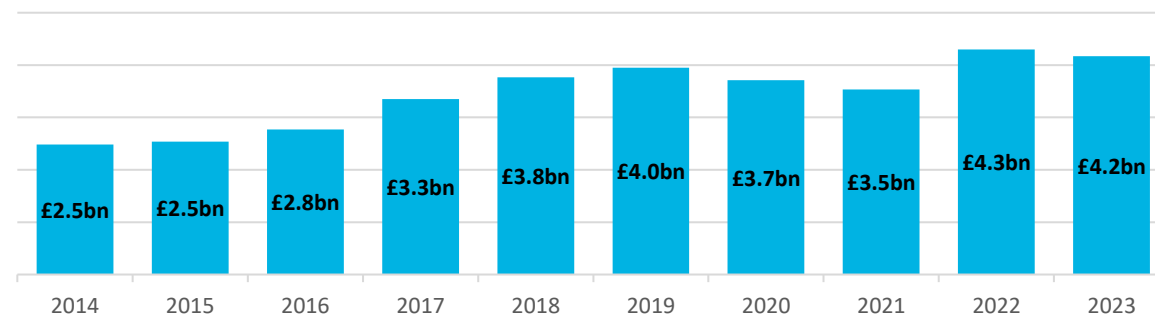
In the broader context of global trade, Swindon and Wiltshire's economic outlook will depend on both diversification into new markets and continued efforts to mitigate trade barriers with the EU and US. Strengthening trade ties with emerging markets, alongside maintaining key existing partnerships, will be essential to securing long-term economic resilience.

Source: ONS Subnational trade timeseries, 2022; UK Trade Info, HM Revenue and Customs, 2013 - 2023

Trade Value Change, 2019-2022



Total Export Values South West of England to United States, 2014 - 2023



Future Trends and Macroeconomic Landscape – Green Transition

The low-carbon sector is becoming an increasingly important part of Swindon and Wiltshire's economy, presenting opportunities for both growth and resilience. As the UK moves towards net zero by 2050, the demand for clean energy, sustainable construction, and low-carbon transport solutions is accelerating. Swindon and Wiltshire are already well-positioned to benefit from this shift, with key strengths in renewable energy, battery storage, and green manufacturing. Recent shifts in carbon reduction set the two local authorities off in a good position where they can develop strong alignment with national policy on the topic of the green transition.

Swindon has a strong industrial and automotive heritage that is evolving towards a low-carbon future. The town has been a hub for electric vehicle (EV) innovation, with Honda's former plant having played a role in the supply chain for hybrid vehicles. While the closure of Honda in 2021 was a significant challenge, the site's redevelopment presents an opportunity to attract new investment into sustainable manufacturing and green energy industries. The area has also seen growth in battery storage projects, such as the Minety Battery Energy Storage Scheme, one of the largest of its kind in Europe, which supports grid stability by storing excess renewable energy.

Wiltshire's rural economy also plays a crucial role in the low-carbon transition. With its extensive agricultural land and natural resources, the county has significant potential for renewable energy generation, particularly in solar and biomass. The region has already seen the expansion of large-scale solar farms, contributing to the UK's clean energy supply. This coupled with increased R&D in green technology, low carbon materials and green construction puts the area in a strong position in the green transition.

At a national level, the UK's Industrial Strategy has consistently identified low-carbon industries as a key growth sector, with government priorities focused on net zero, green energy, and clean manufacturing. Swindon and Wiltshire's assets, including renewable energy projects, battery storage, and green skills training, align well with these national ambitions, offering opportunities to attract investment and drive long-term sustainable growth.

Key Green Transition Assets and Opportunities



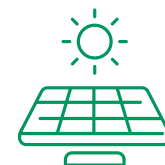
Minety Battery Energy Storage Scheme:

One of the largest battery storage projects in Europe, could help to stabilise the grid with renewable energy.



Honda Site Redevelopment:

A major opportunity for green manufacturing and sustainable industries following the closure of the Honda plant.



Large-scale solar farms:

Solar is a significant green energy production asset already, there is scope to retrofit buildings and develop roof top solar to enhance the position further.



Alignment with UK National Priorities:

The UK's new industrial strategy embeds low carbon as a central sector of focus for the UK economy. Swindon and Wiltshire should capitalise on their strengths and align with current policy focus.

Future Trends and Macroeconomic Landscape – Automation and AI

Automation and AI in Swindon and Wiltshire

Automation and AI are reshaping industries across the UK, with Swindon and Wiltshire facing both risks and opportunities. Previous ONS estimates suggested 93,000 jobs in Swindon and 184,000 in Wiltshire were at risk of automation, though the pace of AI adoption has since accelerated. Nationally, AI-related businesses have grown by 17%, with revenues up 34% and employment rising 29% in the past year. While London and the South East dominate AI activity, its applications in manufacturing, logistics, and energy create opportunities for Swindon and Wiltshire to capitalise on AI-driven transformation.

Workforce Impact and Sectoral Change

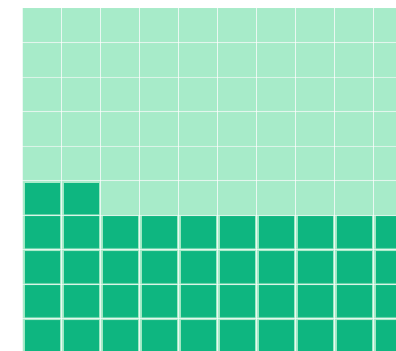
AI adoption is expected to automate routine cognitive tasks while creating new high-skilled roles. National forecasts suggest AI could replace 1–3 million jobs over time, though this will be offset by new employment opportunities. For Swindon and Wiltshire, key sectors like logistics and advanced manufacturing will see increased AI use, improving efficiency but potentially reducing lower-skilled roles. Reskilling and workforce adaptability will be crucial, particularly as AI's long-term impact on GDP could exceed 11% by 2050.

Strategic Considerations

To harness AI's benefits, Swindon and Wiltshire must focus on skills development, investment in scalable AI technologies, and support for SMEs in adopting AI-driven efficiencies. Policymakers and businesses must collaborate to ensure the region remains competitive in the evolving AI landscape, balancing economic growth with workforce resilience.

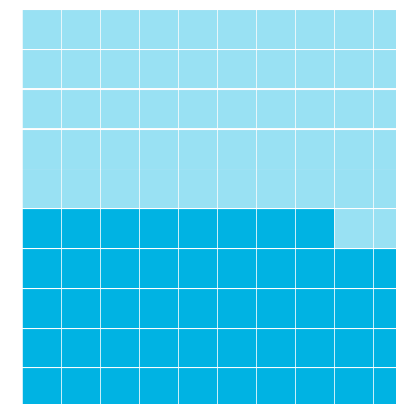
In **Wiltshire**, the risk profile differs slightly due to its more diverse economic base, including professional services, education, and the military. These sectors are expected to experience task-based rather than full-job automation, where AI enhances rather than replaces roles. For example, AI-driven data analytics, cybersecurity, and digital learning tools are increasingly being integrated into business and public sector operations. Wiltshire has a lower probability of automation than national averages of **46%**.

Probability of automation:
Wiltshire 42%



Swindon's economy, with its strong manufacturing and logistics base, remains particularly exposed to automation trends. Industries such as advanced manufacturing, transport, and warehousing have already seen increased uptake of AI-driven processes, from predictive maintenance in factories to automated warehousing and logistics operations. This presents both challenges and opportunities—while automation may lead to job displacement in routine and manual roles, it also creates demand for higher-skilled jobs in AI oversight, robotics engineering, and digital operations. Swindon has a higher probability of automation than seen nationally where the average probability of jobs automation is **46%**.

Probability of automation:
Swindon 48%



Source: ONS Probability of Automation, 2019; The Future of Jobs Report 2025, World Economic Forum, 2025; Artificial Intelligence Sector Study 2023, Department for Science, Innovation and Technology, 2023; The Impact of AI on the Labour Market, Tony Blair Institute for Global Change, 2024

Future Trends and Macroeconomic Landscape

– Policy Implications

With significant changes unfolding on both the national and international stage, a high degree of uncertainty persists. However, by maintaining a strong labour market and continuing to be an attractive place to live, work, visit, and do business, Swindon and Wiltshire can capitalise on their existing strengths while also building resilience against economic shocks.

Future growth in Swindon and Wiltshire is expected to be diverse, supported by the anticipated growth in jobs—particularly in key foundational sectors such as healthcare, as well as high-value industries like the professional, scientific, and technical sectors. Ensuring that new and growing businesses have access to enabling infrastructure will be crucial to realising this opportunity. This means careful policy consideration must be given to the provision of employment land and premises, alongside efforts to provide housing that meets the needs of a growing population and changing demographic. Housing affordability is already a pressing challenge across both local authorities, with high housing costs placing significant pressure on residents' incomes. Addressing this issue will be essential to sustaining economic growth and ensuring an inclusive economy.

At the same time, the transition to a greener economy must remain a priority. Beyond the moral and social imperatives of addressing climate change, there are clear economic opportunities to be harnessed. Swindon and Wiltshire already possesses assets that can be leveraged to drive sustainable, clean growth. This shift will be particularly important in the context of automation and AI, which are likely to reshape the labour market, leading to transitions away from certain sectors and occupations. Proactive planning and investment in skills, infrastructure, and innovation will be key to ensuring the area remains competitive and adaptable in the years ahead.



Appendix

Appendix – Priority Sector Definitions

Defence

25400 : Manufacture of weapons and ammunition
 27110 : Manufacture of electric motors, generators and transformers
 27120 : Manufacture of electricity distribution and control apparatus
 27200 : Manufacture of batteries and accumulators
 27310 : Manufacture of fibre optic cables
 27320 : Manufacture of other electronic and electric wires and cables
 27330 : Manufacture of wiring devices
 27400 : Manufacture of electric lighting equipment
 27900 : Manufacture of other electrical equipment
 26110 : Manufacture of electronic components
 26120 : Manufacture of loaded electronic boards
 26200 : Manufacture of computers and peripheral equipment
 26301 : Manufacture of telegraph and telephone apparatus and equipment
 26309 : Manufacture of communication equipment (other than telegraph and telephone apparatus and equipment)
 26400 : Manufacture of consumer electronics
 26511 : Manufacture of electronic instruments and appliances for measuring, testing, and navigation, except industrial process control equipment
 26512 : Manufacture of electronic industrial process control equipment
 26513 : Manufacture of non-electronic instruments and appliances for measuring, testing and navigation, except industrial process control equipment
 26514 : Manufacture of non-electronic industrial process control equipment
 26520 : Manufacture of watches and clocks
 26600 : Manufacture of irradiation, electromedical and electrotherapeutic equipment
 26701 : Manufacture of optical precision instruments
 26702 : Manufacture of photographic and cinematographic equipment
 26800 : Manufacture of magnetic and optical media
 32500 : Manufacture of medical and dental instruments and supplies

29201 : Manufacture of bodies (coachwork) for motor vehicles (except caravans)
 29202 : Manufacture of trailers and semi-trailers
 29203 : Manufacture of caravans
 29310 : Manufacture of electrical and electronic equipment for motor vehicles
 29320 : Manufacture of other parts and accessories for motor vehicles
 30110 : Building of ships and floating structures
 30120 : Building of pleasure and sporting boats
 30200 : Manufacture of railway locomotives and rolling stock
 30300 : Manufacture of air and spacecraft and related machinery
 30400 : Manufacture of military fighting vehicles
 30910 : Manufacture of motorcycles
 30920 : Manufacture of bicycles and invalid carriages
 30990 : Manufacture of other transport equipment nec
 33130 : Repair of electronic and optical equipment
 33140 : Repair of electrical equipment
 33160 : Repair and maintenance of aircraft and spacecraft
 33170 : Repair and maintenance of other transport equipment
 84220 : Defence activities

Environmental

38110 : Collection of non-hazardous waste
 38120 : Collection of hazardous waste
 38210 : Treatment and disposal of non-hazardous waste
 38220 : Treatment and disposal of hazardous waste
 38310 : Dismantling of wrecks
 38320 : Recovery of sorted materials
 74901 : Environmental consulting activities

Appendix – Priority Sector Definitions

Life Sciences including Natural Sciences

21100 : Manufacture of basic pharmaceutical products
 21200 : Manufacture of pharmaceutical preparations
 26600 : Manufacture of irradiation, electromedical and electrotherapeutic equipment
 32500 : Manufacture of medical and dental instruments and supplies
 72110 : Research and experimental development on biotechnology
 72190: Other research and experimental development on natural sciences and engineering
 N.B. the government's definition does not include 72190 within life sciences. Natural science research is included here to fully capture activity at Porton Down

Professional Business Services

64110 : Central banking
 64191 : Banks
 64192 : Building societies
 64201 : Activities of agricultural holding companies
 64202 : Activities of production holding companies
 64203 : Activities of construction holding companies
 64204 : Activities of distribution holding companies
 64205 : Activities of financial services holding companies
 64209 : Activities of other holding companies (not including agricultural, production, construction, distribution and financial services holding companies) n.e.c
 64301 : Activities of investment trusts
 64302 : Activities of unit trusts
 64303 : Activities of venture and development capital companies
 64304 : Activities of open-ended investment companies
 64305 : Activities of property unit trusts
 64306 : Activities of real estate investment trusts
 64910 : Financial leasing
 64921 : Credit granting by non-deposit taking finance houses and other specialist consumer credit grantors

64922 : Activities of mortgage finance companies
 64929 : Other credit granting (not including credit granting by non-deposit taking finance houses and other specialist consumer credit grantors and activities of mortgage finance companies) n.e.c.
 64991 : Security dealing on own account
 64992 : Factoring
 64999 : Other financial service activities, except insurance and pension funding, (not including security dealing on own account and factoring) n.e.c.
 65110 : Life insurance
 65120 : Non-life insurance
 65201 : Life reinsurance
 65202 : Non-life reinsurance
 65300 : Pension funding
 66110 : Administration of financial markets
 66120 : Security and commodity contracts brokerage
 66190 : Other activities auxiliary to financial services, except insurance and pension funding
 66210 : Risk and damage evaluation
 66220 : Activities of insurance agents and brokers
 66290 : Other activities auxiliary to insurance and pension funding
 66300 : Fund management activities
 68100 : Buying and selling of own real estate
 68201 : Renting and operating of Housing Association real estate
 68202 : Letting and operating of conference and exhibition centres
 66190 : Other activities auxiliary to financial services, except insurance and pension funding
 68310 : Real estate agencies
 68320 : Management of real estate on a fee or contract basis
 69101 : Barristers at law
 69102 : Solicitors

Appendix – Priority Sector Definitions

Professional Business Services (cont.)

69109 : Activities of patent and copyright agents; other legal activities (other than those of barristers and solicitors) nec

69201 : Accounting, and auditing activities

69202 : Bookkeeping activities

69203 : Tax consultancy

70100 : Activities of head offices

70210 : Public relations and communication activities

70221 : Financial management

70229 : Management consultancy activities (other than financial management)

70229 : Management consultancy activities (other than financial management)

71111 : Architectural activities

71112 : Urban planning and landscape architectural activities

71121 : Engineering design activities for industrial process and production

71122 : Engineering related scientific and technical consulting activities

71129 : Other engineering activities (not including engineering design for industrial process and production or engineering related scientific and technical consulting activities)

71200 : Technical testing and analysis

72190 : Other research and experimental development on natural sciences and engineering

72200 : Research and experimental development on social sciences and humanities

73110 : Advertising agencies

73120 : Media representation

73200 : Market research and public opinion polling

74100 : specialised design activities

74201 : Portrait photographic activities

74202 : Other specialist photography (not including portrait photography)

74202 : Other specialist photography (not including portrait photography)

74203 : Film processing

74209 : Other photographic activities (not including portrait and other specialist photography and film processing) nec

74300 : Translation and interpretation activities

74902 : Quantity surveying activities

74909 : Other professional, scientific and technical activities (not including environmental consultancy or quantity surveying)

77110 : Renting and leasing of cars and light motor vehicles

77120 : Renting and leasing of trucks

77210 : Renting and leasing of recreational and sports goods

77220 : Renting of video tapes and disks

77291 : Renting and leasing of media entertainment equipment

77299 : Renting and leasing of other personal and household goods (other than media entertainment equipment)

77310 : Renting and leasing of agricultural machinery and equipment

77320 : Renting and leasing of construction and civil engineering machinery and equipment

77330 : Renting and leasing of office machinery and equipment (including computers)

77341 : Renting and leasing of passenger water transport equipment

77342 : Renting and leasing of freight water transport equipment

77351 : Renting and leasing of passenger air transport equipment

77352 : Renting and leasing of freight air transport equipment

77390 : Renting and leasing of other machinery, equipment and tangible goods nec

77400 : Leasing of intellectual property and similar products, except copyrighted works

Appendix – Priority Sector Definitions

Creative Industries

32120 : Manufacture of jewellery and related articles
 58110 : Book publishing
 58120 : Publishing of directories and mailing lists
 58130 : Publishing of newspapers
 58141 : Publishing of learned journals
 58142 : Publishing of consumer, business and professional journals and periodicals
 58190 : Other publishing activities
 58210 : Publishing of computer games
 58290 : Other software publishing
 59111 : Motion picture production activities
 59112 : Video production activities
 59113 : Television programme production activities
 59120 : Motion picture, video and television programme post-production activities
 59131 : Motion picture distribution activities
 59132 : Video distribution activities
 59133 : Television programme distribution activities
 59140 : Motion picture projection activities
 59200 : Sound recording and music publishing activities
 60100 : Radio broadcasting
 60200 : Television programming and broadcasting activities
 62011 : Ready-made interactive leisure and entertainment software development
 62012 : Business and domestic software development
 62020 : Computer consultancy activities
 70210 : Public relations and communication activities
 71111 : Architectural activities
 73110 : Advertising agencies
 73120 : Media representation
 74100 : Specialised design activities

74201 : Portrait photographic activities
 74202 : Other specialist photography (not including portrait photography)
 74203 : Film processing
 74209 : Other photographic activities (not including portrait and other specialist photography and film processing) nec
 74300 : Translation and interpretation activities
 85520 : Cultural education
 90010 : Performing arts
 90020 : Support activities to performing arts
 90030 : Artistic creation
 90040 : Operation of arts facilities
 91011 : Library activities
 91012 : Archive activities
 91020 : Museum activities

Appendix – Priority Sector Definitions

Advanced Manufacturing and Engineering

20110 : Manufacture of industrial gases
 20120 : Manufacture of dyes and pigments
 20130 : Manufacture of other inorganic basic chemicals
 20140 : Manufacture of other organic basic chemicals
 20150 : Manufacture of fertilisers and nitrogen compounds
 20160 : Manufacture of plastics in primary forms
 20170 : Manufacture of synthetic rubber in primary forms
 20200 : Manufacture of pesticides and other agrochemical products
 20301 : Manufacture of paints, varnishes and similar coatings, mastics and sealants
 20302 : Manufacture of printing ink
 20411 : Manufacture of soap and detergents
 20412 : Manufacture of cleaning and polishing preparations
 20420 : Manufacture of perfumes and toilet preparations
 20510 : Manufacture of explosives
 20520 : Manufacture of glues
 20530 : Manufacture of essential oils
 20590 : Manufacture of other chemical products nec
 20600 : Manufacture of man-made fibres
 21100 : Manufacture of basic pharmaceutical products
 21200 : Manufacture of pharmaceutical preparations
 26110 : Manufacture of electronic components
 26120 : Manufacture of loaded electronic boards
 26200 : Manufacture of computers and peripheral equipment
 26301 : Manufacture of telegraph and telephone apparatus and equipment
 26309 : Manufacture of communication equipment (other than telegraph and telephone apparatus and equipment)
 26400 : Manufacture of consumer electronics
 28250 : Manufacture of non-domestic cooling and ventilation equipment
 28290 : Manufacture of other general-purpose machinery nec

26511 : Manufacture of electronic instruments and appliances for measuring, testing, and navigation, except industrial process control equipment
 26512 : Manufacture of electronic industrial process control equipment
 26513 : Manufacture of non-electronic instruments and appliances for measuring, testing and navigation, except industrial process control equipment
 26514 : Manufacture of non-electronic industrial process control equipment
 26520 : Manufacture of watches and clocks
 26600 : Manufacture of irradiation, electromedical and electrotherapeutic equipment
 26701 : Manufacture of optical precision instruments
 26702 : Manufacture of photographic and cinematographic equipment
 27110 : Manufacture of electric motors, generators and transformers
 27120 : Manufacture of electricity distribution and control apparatus
 27200 : Manufacture of batteries and accumulators
 27310 : Manufacture of fibre optic cables
 27320 : Manufacture of other electronic and electric wires and cables
 27330 : Manufacture of wiring devices
 27400 : Manufacture of electric lighting equipment
 27510 : Manufacture of electric domestic appliances
 27520 : Manufacture of non-electric domestic appliances
 27900 : Manufacture of other electrical equipment
 28110 : Manufacture of engines and turbines, except aircraft, vehicle and cycle engines
 28301 : Manufacture of agricultural tractors
 28302 : Manufacture of agricultural and forestry machinery (other than agricultural tractors)
 28410 : Manufacture of metal forming machinery
 28490 : Manufacture of other machine tools
 28910 : Manufacture of machinery for metallurgy
 28921 : Manufacture of machinery for mining
 28922 : Manufacture of earthmoving equipment
 28923 : Manufacture of equipment for concrete crushing and screening roadworks

Appendix – Priority Sector Definitions

Advanced Manufacturing and Engineering (cont.)

28930 : Manufacture of machinery for food, beverage and tobacco processing
 28940 : Manufacture of machinery for textile, apparel and leather production
 28950 : Manufacture of machinery for paper and paperboard production
 28960 : Manufacture of plastics and rubber machinery
 28990 : Manufacture of other special-purpose machinery nec
 29100 : Manufacture of motor vehicles
 29201 : Manufacture of bodies (coachwork) for motor vehicles (except caravans)
 29202 : Manufacture of trailers and semi-trailers
 29203 : Manufacture of caravans
 29310 : Manufacture of electrical and electronic equipment for motor vehicles
 29320 : Manufacture of other parts and accessories for motor vehicles
 30200 : Manufacture of railway locomotives and rolling stock
 30300 : Manufacture of air and spacecraft and related machinery
 30400 : Manufacture of military fighting vehicles
 30910 : Manufacture of motorcycles
 30920 : Manufacture of bicycles and invalid carriages
 30990 : Manufacture of other transport equipment nec
 26800 : Manufacture of magnetic and optical media
 28120 : Manufacture of fluid power equipment
 28131 : Manufacture of pumps
 28132 : Manufacture of compressors
 28140 : Manufacture of other taps and valves
 28150 : Manufacture of bearings, gears, gearing and driving elements
 28210 : Manufacture of ovens, furnaces and furnace burners
 28220 : Manufacture of lifting and handling equipment
 28230 : Manufacture of office machinery and equipment (except computers and peripheral equipment)
 28240 : Manufacture of power-driven hand tools

Cyber

47410 : Retail sale of computers, peripheral units and software in specialised stores
 58210 : Publishing of computer games
 58290 : Other software publishing
 62011 : Ready-made interactive leisure and entertainment software development
 62012 : Business and domestic software development
 62020 : Computer consultancy activities
 62030 : Computer facilities management activities
 62090 : Other information technology and computer service activities
 63110 : Data processing, hosting and related activities
 63120 : Web portals
 95110 : Repair of computers and peripheral equipment

Swindon and Wiltshire Local Economic Assessment 2025

*This local economic assessment was conducted by GC Insight and commissioned by the Swindon and Wiltshire Business and Growth Unit, Wiltshire Council . For more information please contact:
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