

Rural Economic Study

for Swindon and Wiltshire

For:
Swindon and Wiltshire Local Enterprise Partnership

By:

Accend

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Contents	Page
1: Introduction.....	4
2: Summary of findings and recommendations.....	5
3. Methodology.....	8
4: Analysis.....	12
5: Strengths, Weaknesses, Opportunities and Threats.....	28
6: Case Studies.....	38
7: Conclusions and Recommendations.....	42
Appendix 1: Map of Swindon & Wiltshire rural areas.....	50
Appendix 2: Swindon and Wiltshire Rural Framework.....	51
Appendix 3: Charts of Sectoral trends in rural areas – changes in No of local business units (est.).....	52
Appendix 4: Sectoral GVA projections (est.).....	61
Appendix 5: Map of Interviewee locations & sectors.....	84
Appendix 6: Interview Notes (confidential & provided separately)	85
Appendix 7: Available Property Summary by Postcode.....	86
Appendix 8: Map of Wiltshire broadband coverage.....	93
Appendix 9: Additional data analysis.....	94

1. Introduction

Swindon and Wiltshire LEP recognises that there are gaps in knowledge about the rural economy of the area. This Rural Economic Study has been developed to examine the rural part of the Swindon and Wiltshire economy, how it performs, what are its strengths and weaknesses, what are the threats and barriers to growth of the rural economy and what opportunities can be seized to further its sustainable development.

The study is designed to inform the development of a Rural Economic Plan for the Swindon and Wiltshire LEP area and the potential for that to become a more fully integrated part of the LEP's Strategic Economic Plan and Local Economic Assessment.

In commissioning this Rural Economy Study, the Swindon and Wiltshire LEP is ahead of the game in understanding its rural economy and this will put the LEP in a strong position to lead on rural economy issues. The biggest drawback of being in the lead is that there is no directly comparable data, with no reports identified in other LEP areas that focus specifically on the economy of their rural areas. The methodology section, therefore, describes how comparisons have been made.

Whilst every attempt has been made to capture key aspects of the rural economy of Swindon and Wiltshire in this report, based on data provided and on primary data collected through interviews, due to the scope of this study, there may be some issues and areas not identified and work may already be underway on some aspects that were not identified through the study.

The rural areas of Swindon and Wiltshire are full of contrasts, with market towns and villages – some close to larger urban areas, rural areas forming part of three different Areas of Outstanding Natural Beauty (AONB), large cutting edge advanced design and manufacturing businesses, a large military presence in and around Salisbury Plain, world class visitor attractions and internationally important sites, such as World Heritage Site Stonehenge, Salisbury Cathedral and Stourhead. Knitting all of this together are the businesses and communities that exist across Swindon and Wiltshire, from large businesses to entrepreneurs just starting up. This Study has been developed with the support and time of a large number of individuals, committed to supporting a vibrant living and working rural economy across Swindon and Wiltshire.

2. Summary of key findings and recommendations

The findings and recommendations are based on secondary and primary data collection and analysis described in more detail in sections 4-7. Data has been analysed to provide an indicative assessment of the Swindon and Wiltshire rural economy.

Key Findings

Population

In 2014, the mid-year population estimate (based on Lower Super Output Areas, LSOAs) for England was 54.3 million, of which 9.3 million (17.0 per cent) lived in rural areas and 45.0 million (83.0 per cent) lived in urban areas. (Statistical Digest of Rural England, DEFRA 2017).

The projected rural population in 2016 for Swindon and Wiltshire, using Oxford Economics population forecasts, 2016 used to inform the LEPs Local Economic Assessment (2016) and estimates from the Rural Framework developed through this study is 341,762 - this is 48.9% of the total population of Swindon and Wiltshire. The percentage rural population of Swindon and Wiltshire is therefore significantly higher compared to the national average for England (Statistical Digest of Rural England, DEFRA 2017).

Value of the rural economy

As per the LEP's Strategic Economic Plan 2016 and Local Economic assessment 2016, GVA is used as a measure of economic productivity. The estimates here are indicative assessments of GVA.

Rural resident worker GVA:

The same formula has been used here as was used in the LEA 2016 to estimate GVA:

2016 rural worker GVA total for Swindon is: £574,895,310
2016 rural worker GVA total for Wiltshire is: £6,709,020,738

Total rural resident worker GVA (est.2016) is: £7,283,916,048

Rural Economy GVA:

In 2013 estimated rural GVA based on industry was estimated to be £6,507,593,000, which was 43.9% of total Swindon and Wiltshire GVA.

In 2016 estimated rural GVA based on industry was projected to be £7,130,861,000, which was 43.5% of total Swindon and Wiltshire GVA.

In 2021 rural GVA based on industry is projected to be £7,955,180,000, which is 43.5% of total Swindon and Wiltshire GVA.

Key recommendations

There are a large number of recommendations identified through this study that will support business and economic growth in the rural parts of Swindon and Wiltshire. These are discussed in more detail and aligned to the Swindon and Wiltshire LEP priorities in Section 6. The recommendations here have been distilled from the evidence and data collected and detailed recommendations and are considered to be the priority recommendations for consideration by the LEP to further rural economic growth.

Place shaping, premises and planning

- Development of a new commercial property database to replace the current one that is not felt by property agents to be well maintained. This might involve a partnership with an existing database service such as CoStar or similar.
- Establish a resource and procedure for encouraging and assisting businesses that wish to develop or to relocate into the area that co-ordinates the interests of public sector agencies and private utilities/services and helps guide them through the processes.
- Given the lack of appropriate rural grow-on spaces identified in this study, particularly for mixed B1/B2 uses, there needs to be an investigation of the best ways and locations to provide such space. This should include how publicly owned sites and assets can be utilised for speculative property development or sold to provide funds for development of other sites and whether conversion and development of farm and other buildings/sites can be supported for such employment uses.
- Development of visions/masterplans for rural hub towns with wide ranging consultation of the community in order to help define the purpose of those towns, identify employment opportunities and locations, optimise sustainable development and to avoid a two speed economy developing across the LEP area. This should include analysis of retail, industrial and office space within each location and assessment of likely future needs to ensure economically sustainable growth.

Sectors

- Develop opportunities for rural businesses to participate in cluster growth, for example life sciences centered on Great Western Hospital, Swindon and science, defence and security cluster centered on Porton Down or possible new centres of excellence, such as advanced design and engineering west of Salisbury. To include exploration of developing virtual clusters linked to existing and emerging clusters.
- Food and Accommodation services should be considered part of the Visitor Economy sector and given that 2012-16 delivered 4 consecutive years of record visitor numbers to the LEP area, consider whether this should also be one of the LEP's Priority Sectors.

Skills

- If a success, build on the Higher Futures pilot for developing STEM skills to expand and extend to address other skills gaps identified in the rural economy, such as digital and

management/professional skills and delivered in locations/ways that are accessible for rural businesses.

Transport & accessibility

- Introducing/expanding accessible independent transport solutions, particularly for young people to enable access to further and higher education opportunities, apprenticeships and employment opportunities. Examples of this could include an expansion of the Wheels to Work programme managed by Community First.

Growth Zones

- In supporting the development of the Growth Zones, a rural proofing exercise is undertaken for each scheme to ensure that opportunities can be developed for rural businesses and steps taken to mitigate any potential adverse impacts, with particular cognisance of any cumulative impacts on the rural economy of investments in projects in urban areas

Brexit

- Opportunities should be explored for post Brexit regional management/co-ordination of public funds for business support for sectors that have been supported by EU funds and have significant regional variations, such as farming.

Further work needed

- It is considered that a piece of work should be undertaken to analyse the current business locations, allocated employment land and rural hub towns where there will still be a lack of superfast broadband following completion of the contract that is due to be let in May 2017.

3. Methodology

Defining the Rural Area:

The Government's 2011 Rural-Urban Classification for Local Authority Districts in England classifies Swindon as one of 97 Local Authority Districts (LADs) that is Predominantly Urban: Urban with City and Town and Wiltshire as one of 41 LADs that is Predominantly Rural: Largely Rural. One of the key tasks in developing this Rural Economic Study was to undertake a more detailed assessment of what comprises the rural parts of the Swindon and Wiltshire LEP area.

It was agreed with the Rural Economy Steering Group that the DEFRA 2011 urban:rural definition would be used to identify the rural parts of the Swindon and Wiltshire LEP area, but would also include the Rural Hub Towns (DEFRA, 2014) of Amesbury, Calne, Devizes, Melksham, Warminster and Royal Wootton Bassett. Following this, discussions with the project manager clarified the other areas designated as urban; Corsham and Westbury would be excluded from the rural area definition to ensure consistency with existing rural programmes, such as LEADER and any potential future programmes.

A rural framework was developed to provide a comprehensive assessment of what are the rural parts of the LEP area. To compile the framework, each Middle Super Output Area (MSOA) was assessed. Where all the Lower Super Output Areas (LSOAs) in a MSOA were classed as rural (Rural village and dispersed and Rural town and fringe) the whole MSOA was assessed as rural. Where only some LSOAs within a MSOA were classed as rural, only the individual rural LSOAs were identified as rural. As indicated above, this identification of rural areas also included the MSOAs/LSOAs of the Rural Hub Towns, even though these are classed as Urban city and town within the DEFRA urban:rural definitions (2011). The map of the rural areas of Swindon and Wiltshire LEP area can be found at Appendix 1.

The rural framework was populated with ONS data from the 2011 census, last updated in 2015 (ONS 2015), which provides a detailed baseline for assessing changes to the rural population and economy, building data from each MSOA/LSOA as appropriate across a range of population, demographic, employment, education and health and economic factors from the 2011 census. An electronic copy of the rural framework accompanies this report (Appendix 2). The framework was also used to provide data in developing an indicative assessment of the performance of the rural economy. This will enable more detailed assessment of a range of factors in developing the REP, but can also be used by the LEP to undertake work on rural areas in the future.

Economic assessment of the rural LEP area:

Having established the framework of rural areas, this was used to compile data for the whole rural area. Proportions from this were then applied to Cambridge Econometrics (CE) and Oxford Economics (OE) data (2016) used to inform the LEPs Local Economic Assessment (LEA) 2016 and BRES 2015 data to provide estimates of demographic changes across the rural areas and also to sectoral and resident GVA forecasts and for consistency with the LEA 2016. Assumptions made in the compilation of the CE, OE, BRES and ONS data and their use need to be recognised in use of this data, together with estimates used to provide the indicative assessments of the value of the rural economy of Swindon and Wiltshire.

The data built from the rural framework regarding sectors and business numbers at the MSOA/LSOA level can only provide an indication of trends in each sector. This is due to ONS data being rounded

up or down to nearest 5, which can lead to significant margins of error at these local levels of geography, so needs to be treated with caution.

It should also be noted that there were some inconsistencies in ONS data for businesses in one of the MSOAs – Swindon 008. Only part of the MSOA is classed as rural, but all of the business units in the MSOA were assessed as rural, so all business units from this MSOA have been used in assessing business numbers and sectoral trends, but may lead to small variations in analysis of rural and urban businesses and sectors.

As described in the LEA 2016, GVA data is time lagged, with the latest GVA totals available for the Swindon and Wiltshire LEP area were from 2013. Given this report is examining the rural economy, it has been necessary to use the disaggregated Cambridge Econometric sectoral forecasts used to inform the LEA 2016 to produce indicative GVA estimates for the sectors in the rural economy. It should be noted that figures, therefore may be different to those in the LEA.

As described in the introduction, as far as it has been possible to ascertain, no similar reports are available from other LEP areas that focus on the economies of their rural areas. Comparison of Swindon & Wiltshire LEP Rural area, therefore is made with the Local Authority District averages provided by DEFRA at a national level for Predominantly Rural: Largely Rural and Predominantly Urban: Urban with City and Town LADs, which correspond with Wiltshire and Swindon LADs respectively. These are based on the 2011-based Local Authority Classification, published in December 2014 (DEFRA), based on the 2011 Census and the detailed 2011 rural-urban classification of Census Output Areas (published in 2013, DEFRA) and includes Hub Towns as rural.

It should be noted that there are limitations in doing this, as this does not show differences between rural and urban within these LADS, or enable comparison across the whole LEP area for the reasons given above.

This data of national averages for the LAD types for Swindon and Wiltshire will also be used to examine differences between urban and rural areas, but again it is not possible to draw comparisons across the whole LEP area and between the rural and urban areas within the LADs – essentially it will be comparison of differences between national averages of the 2 different types of LADs in terms of rurality.

Secondary and Primary data review/collection and analysis:

A range of secondary data sources were provided by the REP steering group, such as the LEPs Local Economic Assessment 2016 forecast spreadsheets (CE & OE, 2016) and the consultant team found additional secondary data sources, such as the Co Star property database, which have been reviewed to inform this report and provide a sound evidence base. However, this only provides part of the rural economy picture and was supplemented by primary data collection through interviews. As described in the introduction, due to the scope of this study, whilst every attempt has been made to undertake a thorough review of existing secondary and new primary data, it is possible that there are projects and programmes that will not have been captured here. As such this study provides an important contribution to the understanding of the rural economy of Swindon and Wiltshire, which will inform future decisions and investments, but should be considered alongside other sources of information and not in isolation.

Interviews were undertaken with representatives of 30 businesses, including private operated business centres & support organisations, plus 8 council/LEP officers across Swindon & Wiltshire, including business centre managers. See Appendix 5 for location of interviewees. The aim was to try to get as representative a sample of businesses in terms of sectors, size and geographies, but with the small sample size meant this was not completely achievable. REP Steering group members and other stakeholders assisted by acting as gatekeepers in providing suggestions of appropriate interviewees and by facilitating introductions with the consultant team.

Of the businesses:

3 were large, 2 in Wiltshire, 1 in Swindon

2 were medium, both in Wiltshire

The remainder were small or micro businesses, 4 in Swindon, 21 in Wiltshire.

The businesses were from the following sectors/industries:

Business premises

Visitor attraction

Accommodation and food

Farming

Advanced design and engineering

Manufacturing

Retail (including online)

Software developers

Property agents

Military

Activity holidays

Tourism

Business support

Consultancy (farming)

Construction

As many interviews as possible were undertaken face to face, although this was not always possible due to timings, other commitments and unforeseen events. 28 interviews were undertaken face to face. Interviews were semi structured and most of the face to face interviews were recorded to check accuracy of interview notes. Telephone interviews were not recorded. Interview notes were compiled and an analysis undertaken of issues raised. The interviews provided a rich seam and important source of primary data from businesses, sector support organisations and the public sector. The information and findings from these provide a thread throughout the plan.

Building on the analysis of the secondary and primary the data collected, a SWOT analysis was the undertaken to identify the key issues emerging that are facing the rural economy across Swindon and Wiltshire. The SWOT framework was then used to examine the key issues in more detail in section 5 and was used to inform the conclusions and recommendations in section 7.

Comparator areas

The LEA 2016 sets out 4 benchmark LEP areas that are used to compare the economic performance of the Swindon and Wiltshire LEP area. These are: Buckinghamshire Thames Valley, Gloucestershire, Northamptonshire and Oxfordshire. However, none of these have detailed assessments of the economies of their rural areas, so it is not possible to make direct comparisons of the rural economies. In terms of similar areas, the Cheshire and Warrington LEP area has similarities in terms of having both large rural areas and urban centres with areas of heavy industry and significant

forecast growth, but the LEP has no rural economic plan. Indeed, the consultant team were unable to find any other LEP areas that had undertaken an assessment of their rural economies. Some individual local authorities have developed rural economic plans, such as the Gateshead Rural Economic Strategy and Guilford Borough Council's Rural Economic Strategy and these are useful when making comparisons at an individual local authority level, but are of limited use in comparing with a wider LEP area.

The South West LEPs have set up a Rural Productivity Commission in April 2017 to examine issues around rural productivity and growth. A call to develop assessments of the rural economies in each of the South West LEP areas would enable a useful direct comparison across the region.

4. Analysis

Population

In 2014 the mid-year population estimate (based on Lower Super Output Areas, LSOAs) for England was 54.3 million, of which 9.3 million (17.0 per cent) lived in rural areas and 45.0 million (83.0 per cent) lived in urban areas. (Statistical Digest of Rural England, DEFRA 2017).

Based on the Rural Framework developed for this study (see Annex 2 provided in electronic form) using 2011 census data (ONS, Neighbourhood statistics):

- the population of rural Swindon and Wiltshire, 2011 was 332,391, which was 48.9% of the total population of Swindon and Wiltshire;
- the population of rural Swindon, 2011 was 6.6% of the population of rural Swindon and Wiltshire; 2011, 10.6% of the total population of Swindon, 2011 and 3.2% of the total population of Swindon and Wiltshire, 2011.
- The population of rural Wiltshire, 2011 was 93.3% of the population of rural Swindon and Wiltshire, 2011; 65.9% of the total population of Wiltshire and 45.6% of the total population of Swindon and Wiltshire, 2011.

Applying the same percentage split to the Oxford Economics population forecasts (2016), used to inform the LEPs Local Economic Assessment (2016), the population of rural Swindon and Wiltshire in 2016 and 2021 is forecast to be 341,762 and 361,780 (est.) respectively, an 8.8% increase. The percentage rural population of Swindon and Wiltshire is therefore significantly higher compared to the national average for England (Statistical Digest of Rural England, DEFRA 2017).

The following socio-economic estimates of the rural population have been made using the baseline data from the rural framework and projections from Oxford Economics forecasts (2016) used to inform the LEA 2016:

Table 1: Socio-economic forecasts

		2011	2016	2021	Forecast % change 2011-21 (est.)
Population	Rural Swindon & Wiltshire	332391	341762	361780	8.8
	Swindon & Wiltshire	680137	698900	739838	
Employed	Rural population	146043	165833	169973	16.5
	Swindon & Wiltshire	340175	386558	396209	
Self-employed	Rural	29064	32646	33621	15.7
	Swindon & Wiltshire	49119	55333	56986	16.0
Unemployed	Rural Swindon & Wiltshire	6505	3034	2730	-58
	Swindon & Wiltshire	22933	10682	9611	
Retired	Rural Swindon & Wiltshire	36942	37948	40171	8.7
	Swindon & Wiltshire	67761	69630	73709	

Economic Performance of rural area

As per the proposal, indicative assessments of GVA have been estimated.

Resident worker GVA

Resident employment:

(2016, OE LEA) Swindon 121,500 Wiltshire 260,000 Total 381,500

(2011, OE LEA) Swindon 109,600 Wiltshire 239,300 Total 348,900

Rural employed 2011 (146043) as % of all employed in Swindon and Wiltshire 2011 (348,900) is 41.9%

Wiltshire rural employed 2011 (from framework) is 136,634.5 (93.6% of rural total), Swindon is 9,408 (6.4% of rural total)

Using 2011 % (41.9%) in 2016 of all resident employed gives resident rural employment 2016 (inc. self-employed) of 159,848 FTE, a 9.4% increase

2016 estimates for rural employed in Wiltshire was 149,618 FTE (93.6%) and Swindon 10,230 (6.4%) FTE.

Using the formula used for GVA per worker used for LEA 2016 '(GVA figures came from sub-regional productivity table D1, published 19 Feb 2015 where Swindon's GVA per worker was £56,197 p.a. and Wiltshire's was £44,841 p.a)'. Whilst not directly comparable, nationally the GVA per workforce job, 2015 in Predominantly Urban areas (excluding London) was £45,100 and in Predominantly Rural areas it was £43,900 (provisional estimates, Statistical Digest of Rural England, DEFRA 2017).

2016 rural resident worker GVA for Swindon (10,230 x 56,197) = £574,895,310

2016 rural resident worker GVA for Wiltshire (149,618 x 44,841) = £6,709,020,738

Total rural resident worker GVA (est.2016) for Swindon and Wiltshire is **£7,283,916,048**

This figure is slightly higher than the projected 2016 rural GVA estimates based on industry, of £7,130,861,000.

Whilst a detailed study of travel to work/commuting was not within the scope of this report, there is evidence from the interviews with rural businesses that a significant number of employees travel to their employment base from outside the rural area and also from outside Swindon & Wiltshire, particularly those in higher paid and higher skilled jobs. Of the 28 businesses interviewed 6 identified staff travelling in from outside the LEP area, but it is also likely that some rural residents travel to urban centres for employment, so the picture of workers commuting in and out of the LEP's rural areas to work is likely to be quite complex.

GVA sectoral estimates

Using the rural area defined by the rural framework a preliminary assessment was undertaken of historic sectoral trends at an MSOA/LSOA level of the number of business units in each sector. As described in the methodology, data at these very local levels can be unreliable, so was used only give a general picture of change in business units across the whole LEP area set out in Table 2 and caution is needed in use of this data. More detail can be found in Appendix 3.

Table 2: Preliminary assessment of sectoral trends in No local business units across rural Swindon & Wiltshire 2009-13

Sector	% change in rural local business units 2009-13	Change in numbers of local business units 2009-13
All VAT.PAYE registered business units	1.58	285
Public administration and defence	95.2	100
Professional, technical and scientific	16.0	410
Information and communications	12.8	150
Health	9.2	65
Agriculture, forestry and fishing	7.9	155
Property	4.7	25
Education	0	0
Wholesale	-0.72	-5
Accommodation and food services	-1.4	-15
Production	-1.4	-15
Retail	-2.3	-30
Motor trades	-3.3	-20
Arts, entertainment, recreation and other	-3.8	-50
Business administration & Support services	-9.7	-125
Construction	-11.9	-260
Transport & Storage inc. postage	-12.3	-65
Finance & Insurance	-14.5	-40

Source: ONS (2015)

As described in the methodology a more detailed assessment of the rural economy was then undertaken using data used to inform the LEPs Local Economic Assessment (2016) from Cambridge Econometrics forecasts (2016), BRES and guidance from LEP staff for consistency.

Tables 3 & 4 below sets out the indicative estimated projected changes in sectoral GVA 2013-21 for each of Swindon and Wiltshire districts, the rural areas in each district, the whole LEP area and the whole rural area across Swindon and Wiltshire as defined in the rural framework. A detailed breakdown of each sector can be found at Appendix 4.

In 2013 the indicative estimate of rural GVA based on industry was £6,507,593,000, which was 43.9% of total Swindon and Wiltshire GVA.

In 2016 the indicative estimate of rural GVA based on industry was £7,130,861,000, which was 43.5% of total Swindon and Wiltshire GVA.

In 2021 the indicative estimate of rural GVA based on industry was £7,955,180,000, which was 43.5% of total Swindon and Wiltshire GVA.

This shows a very small reduction in percentage of indicative estimates of rural GVA based on industry compared with total GVA for Swindon and Wiltshire 2013-16, but a levelling off to 2021. The GVA in rural areas 2013-21 is projected to grow at 22.2%, compared with a projected growth across the whole LEP area of 23.4%, so there is a projected small, but increasing gap in GVA based on industry between rural and urban areas across Swindon and Wiltshire.

Whilst not directly comparable, on a national level, in 2015 GVA from Predominantly Rural areas contributed 16.5 per cent of England's GVA, and was worth an estimated £237 billion. This compares with 45.1 per cent from Predominantly Urban areas (excluding London) (£646 billion), 26.4 per cent from London (£378 billion) and 11.9 per cent from Urban with Significant Rural areas (£171 billion).

Whilst the estimates show projected GVA growth across all sectors of the rural economy, there is wide variation across the sectors and some variation between the rural Swindon and Wiltshire areas:

- The largest sector in both rural Swindon and Wiltshire is Production, which includes manufacturing and utilities and is the sector with the third largest projected growth across the whole rural LEP area in GVA 2013-21 at 31.1%. This is lower than the projected GVA growth across the whole LEP area during the same period of 36.3%.
- Whilst a much smaller proportion of the rural economy in both Swindon and Wiltshire, Construction is projected to have the fastest growth of all sectors in GVA 2013-21 at 41%, which is only slightly lower than the projected GVA growth across the whole LEP area during the same period of 41.8%.
- The sector with the second highest projected GVA growth 2013-21 across the rural LEP area is Information and Communications at 32.6%. Whilst again this forms a relatively small part of the rural economy, the projected GVA growth in the rural area is larger than that across the whole LEP area at 27.4%
- The sector with the lowest projected growth in GVA across the rural LEP area is Public administration & defence at 2.4%. This forms a much larger part of the economy of rural Wiltshire than Swindon, in part due to the large military presence across Wiltshire. The

growth in GVA 2013-21 in this sector across the whole LEP area is also the lowest of all sectors, but higher than the rural areas at 6.0.

- Other lower growth sectors in terms of projected GVA 2013-21 across the rural LEP areas include Education at 10% , Financial & insurance services and Wholesale trade, both at 11.7%. The projected GVA Wholesale trade figures 2013-21 at a local authority district level are quite different, with a decline of 11% across rural parts of Swindon and growth of 13.6% across rural parts of Wiltshire.
- There are differences also at a local authority district level for the projected GVA figures 2013-21 for Agriculture, forestry and fishing. Across the whole rural LEP area, the growth projections are 28.6%. However, for the rural Swindon area, there is a projected decline of 11.7% and a projected growth of 28.9% across the rural Wiltshire area. This sector forms a relatively small part of the Swindon and Wiltshire economy and also within each LAD in terms of GVA. A picture that is also reflected at a national level, that shows that even in predominantly rural areas, such as Wiltshire only around 2 per cent of the GVA from came from Agriculture, forestry and fishing. (Statistical Digest of Rural England, 2017).

The indicative assessment of projected sectoral GVA growth will be examined further in sections 5 and 7.

Table 3: Projected Rural sectoral GVA growth 2013-21

CE Broad sectors	Swindon & Wiltshire rural GVA projected change 2013-21 (£m est.)	Swindon & Wiltshire rural GVA % projected change 2013-21 (est.)
3. Construction	183.346	41.0%
9. Information & communications	112.685	32.6%
2. Production	311.175	31.1%
8. Accommodation & food services	69.093	30.6%
1. Agriculture, forestry & fishing	20.117	28.6%
4. Motor vehicle trade	51.5322	27.9%
13. Business administration & support services	78.4107	25.7%
6. Retail trade	114.4386	25.4%
16. Health	97.803	22.9%
11. Property	57.02	22.4%
7. Transport & storage inc. postage	50.696	22.1%
12. Professional, scientific & technical	106.559	18.2%
17. Arts, Entertainment & other services	53.484	18.1%
10. Financial & insurance services	56.495	11.7%
5. Wholesale trade	27.553	11.7%
15. Education	44.545	10.0%
14. Public administration & defence	12.635	2.4%
Totals	1447.5875	22.2%

Estimates based on CE sectoral forecasts, 2016 and estimates based on the Rural Framework (Appendix 2)

Table 4: Total GVA, (based on industry sectors) projected change at Local authority and LEP level for all areas and rural areas 2013-21

	Swindon GVA 2013 (£m CE)	Wiltshire GVA 2013 (£m CE)	Total Swindon & Wiltshire GVA (£m)2013 CE)	Swindon Rural GVA 2013 (£m est)	Wiltshire Rural GVA 2013 (£m est)	Total Swindon & Wiltshire Rural GVA 2013 (£m) est	Swindon GVA 2021(£m est)	Wiltshi re GVA 2021(£ m est)	Total Swindon & Wiltshire GVA 2021(£m) est	Swindo n Rural GVA 2021 (£m est)	Wiltshi re Rural GVA 2021 (£m est)	Total Swindo n & Wiltshi re Rural GVA 2021 (£m) est	Total Swindon & Wiltshire GVA projecte d change 2013-21 (est.)	Total Swindon & Wiltshire GVA % projecte d change 2013-21 (est.)	Swindon & Wiltshire rural GVA projecte d change 2013-21 (est.)	Swindon & Wiltshire rural GVA % projecte d change 2013-21 (est.)
Totals	5880.045	8929.153	14809.198	623.284	5884.309	6507.59	7387.176	10883.372	18270.548	783.04	7172.140	7955.180	3461.35	23.4%	1447.5875	22.2%

Full tables of sectoral GVA forecasts can be found at Appendix 4

The estimates of sectoral GVA are based on the Cambridge Econometrics projections for the 2016 Local Economic Assessment using the percentage of rural populations in both Swindon and Wiltshire from the 2011 rural framework to provide the estimates of rural GVA.

GVA across the whole of Swindon & Wiltshire is forecast to increase by 23.4% 2013-21

Rural GVA forecast estimates are that there will be a 22.2% increase in GVA 2013-21

In 2015, GVA from predominantly rural LADs contributed 16.5 per cent of England's GVA, and was worth an estimated £237 billion. This compares with 45.1 per cent from predominantly urban LADs (excluding London) (£646 billion), 26.4 per cent from London (£378 billion) and 11.9 per cent from urban with significant rural LADs (£171 billion) (Statistical Digest of Rural England, DEFRA 2017).

Based on GVA data and forecasts (CE, 2016) and estimates from the Rural Framework, in 2013, the GVA of Rural Swindon, a predominantly urban LAD was estimated to be 10.6% of the total Swindon GVA and the GVA of rural Wiltshire, a predominantly rural LAD was estimated to be 65.9% of total Wiltshire GVA. The combined GVA in 2013 of rural Swindon and Wiltshire was estimated to be 43.9% of total GVA for Swindon and Wiltshire. GVA in 2016 and 2021 for rural Swindon and Wiltshire is forecast to be 43.5% (est.) of total GVA for Swindon and Wiltshire, using CE 2016 forecasts, so there is a small reduction in proportional percentage GVA contribution (est.) 2013-2021, but levelling off 2016-21.

The GVA in rural areas 2013-21 is projected to grow at 22.2%, compared with a projected growth across the whole LEP area of 23.4%, so there is a projected small, but increasing gap in GVA growth based on industry between rural and urban areas across Swindon and Wiltshire. Whilst not directly comparable for reasons described earlier, this reflects a similar historic picture 2001 to 2015 at the national level which has seen a slight decline of the proportional contribution from Predominantly Rural areas to England's GVA from 17.0% to 16.5% (Statistical Digest of Rural England, DEFRA 2017). However, this includes an increase in London's contribution. When London is excluded, the proportional contribution of Predominantly Rural areas to the GVA of England increased slightly between 2001 and 2015 from 22.1% to 22.5%.

As a predominantly rural LAD, Wiltshire contributed 60.3% of the total Swindon and Wiltshire GVA, 2013 (est.), with Swindon, a predominantly urban LAD contributing 39.7%, 2013 (est.). Again, there is no directly comparable data available, however the percentage estimated GVA contribution of Wiltshire to the total estimated GVA of Swindon and Wiltshire is higher than the proportional national average contribution that predominantly rural areas make to national GVA of 22.5% (2015). This highlights how important the rural economy is to the economy of the Swindon and Wiltshire LEP area.

Primary Data Analysis of Data Collected through Interviews

As described in the methodology section, interviews were undertaken with representatives of 30 businesses, including private operated business centres & support organisations, plus 8 council/LEP officers across Swindon & Wiltshire, including business centre managers. The interviews were recorded where possible and notes were made of all interviews. Interview notes are provided in a separate confidential Appendix 6 for the eyes of Rural Economic Study Steering Group members only in order to preserve the undertakings given to interviewees of confidentiality and non-attribution of responses. Appendix 5 shows the location of interviewees.

Table 5: Analysis of Issues identified in interviews:

Issue:		Responses
Business growth		13 businesses identified growth over recent years
Positive factors of location		Beautiful area Proximity to M4, M5 in north of LEP area Staff retention rates
Staff		Most businesses had mainly local staff, but some had staff recruited from/commuting from outside area: Yeovil, Worcester, Southampton, Dorchester, Bristol - generally these are higher paid/managerial/more skilled jobs.
Customers		Varies: For micro & small businesses tends to be more local customer base. For medium/large businesses, other than visitor attractions, (some of which do attract overseas visitors), tend to have customers both domestic & overseas
Suppliers		As with suppliers, small & micro businesses tend to have a more local supply chains. Larger businesses also try to source materials, services & goods as locally as possible, but some supplies are not available in the UK, let alone the S West, S&W area)
Opportunities/Future plans		12 businesses have plans to grow/expand
Barriers/constraints to growth	Planning	8 businesses reported that planning was a barrier to their growth. This included: additional costs, timescales & lack of

Issue:	Responses	
		political will to support/prioritise proposals that would bring economic growth.
	Lack of suitable premises	9 businesses identified that a lack of suitable business premises was a barrier to business growth. Medium sized grow on space 10,000sqft+ was the biggest gap identified. Three of these businesses face immediate challenges securing suitable medium sized business premises combined B1/B2 uses. One may have to move to an urban area within Wiltshire
	availability of workforce/recruitment	9 businesses identified challenges recruiting staff as a barrier to business growth
	staff retention	2 businesses identified staff retention as a challenge
	skills	Challenges attracting skilled staff was identified by 7 businesses & 3 support organisations
	Finance/Funding	Funding/finance challenges identified: access to finance identified by 3 businesses, business rates identified by 3 businesses, increased costs to farmers by 1 business and loss of CAP payments by 1 business, bureaucracy of applying for/monitoring grant funds identified by 2 business, but 1 other business said this was more perception than reality
	Utilities/services	Issues below were identified as constraints to business growth. Challenges in utilities/services: Lack of access to high speed Broadband identified by 9 businesses, mobile phone signal/connection by 5 businesses, 5 interviewees identified connecting to electricity supplies can be v costly - & access to sufficiently high capacity 3 phase an issue in some areas, 1 business identified lack of co-ordination between Water

Issue:		Responses
		company & Environment Agency on requirements for new premises, asked for different things at different times & v expensive.
	Infrastructure	4 interviewees identified poor road maintenance/planning as a challenge for their businesses. A303 mentioned twice - congestion - dual carriageway needed & 1 interviewee mentioned problems with lack of good North South road links
	lack of joined up working by govt. bodies	2 interviewees identified lack of joined up working between different government bodies as a challenge
	Other	Lack of public transport identified by 5 interviewees as a challenge in recruiting staff, particularly young staff
Business support		A real mix of business support accessed, with many interviewees not identifying any & many finding their own/informal business support. One accessing formal support in a previous business and some identifying support from sector specific organisations.
Brexit		Generally business confidence seems high, although some evidence of businesses delaying investment due to uncertainties. A number of interviewees were concerned that there needs to be tariff free trade & freedom of movement of labour.
What could be done to increase business growth?		Public funds should be focussed on hooks - businesses that will grow and provide support for local and wider economy through employment and secondary spend /supply chain. Support for business, particularly micro/small businesses on marketing and use of social media. Support to be at times &

Issue:	Responses
	<p>in places to suit businesses.</p> <p>Retaining 100% small business rate relief is essential.</p> <p>Access to expert support to help find land/new business premises and facilitate business expansion.</p> <p>Support from LEP to develop a hi-tech business cluster West of Salisbury to attract employees – develop a critical mass, create a magnet. Porton Down too far.</p> <p>Fly tipping v costly, much of it commercial waste – assistance needed from Wiltshire Council & Environment Agency to identify where waste is coming from & who might be doing it?</p> <p>Future public sector agricultural support should be tailored at a regional level – devolved to LEPs, as issues facing Wiltshire & Swindon farmers is v different from other parts of England. In much the same way as LEADER has worked.</p> <p>Need an up to date commercial property register.</p> <p>Need to persuade residential developers who own employment land & are holding it with no desire to do deals, to develop/dispose of it & not try to and wait & try to prove there is no demand and then apply for residential consent.</p> <p>4 main sites owned by the Council - White Horse, Sandown, Warminster – could possibly look at selling and reinvesting. All publicly owned assets in the area should be considered.</p>

Issue:	Responses
	<p>Products like Evans Easyspace model of flexible rents etc. are helpful to the market.</p> <p>Don't put public funds into lifestyle businesses</p> <p>"Keep public sector away from them [entrepreneurs] at all costs", as will turn them off opportunities</p> <p>Resource for a member of staff to look at availability of sites & inward investment in one place for tourism businesses/operators & other sectors.</p> <p>Investment/incentives for accommodation providers – there has been funding for development of large YHs elsewhere</p> <p>Training for planners [on business perspectives]</p> <p>Another visitor attraction needed to encourage visitors to area to take in Stonehenge, Salisbury & another one. The proposed Salisbury Plain Heritage Centre could do this.</p> <p>Investment in bigger picture projects – Great Western Way, Melksham canal link</p>

Business Premises, Employment Land and Planning Matters

PHOTOGRAPHS REMOVED

Glove factory studios workspace, Holt

Brydges Court, Ludgershall

Other than the interviews with property agents referred to elsewhere within this report, some detailed analysis was undertaken of available rural business premises set out below, along with a review of a report prepared by Roger Tym & Partners at the end of 2011 in relation to Employment Land:

Overview of 'Wiltshire Workspace and Employment Land Review'

Whilst this report only covers Wiltshire and it stretches back to 2011, there are some issues, pertinent to rural areas that were raised then that are now worth checking in as far as practical as part of this study:

1. The LEP had an ambition to bring forward a range of 'oven ready' development sites in order to ensure that 10,000 private sector jobs could have been created by 2015. Whilst it is not known the extent to which this was successful, it is interesting to note the importance of such sites and to explore whether there are sufficient numbers of these currently available to support business growth.
2. The importance of superfast broadband was raised as important to retaining work in the LEP area.
3. Low vacancy rates are exacerbated by the available stock not being fit for modern businesses.
4. Low rental and freehold rental levels resulted in lack of speculative development – essentially market failure – this affects the supply of space and business growth.
5. The Council has had opportunities to encourage development through actions including:
 - a. structured asset disposal and investment;
 - b. use of Community Infrastructure Levy
 - c. restricting alternative uses for employment land;
 - d. a flexible approach to allocation of employment land to encourage development – particularly appropriate in rural areas; and
 - e. monitoring of employment land take up

Planning Matters

As this work was commissioned to provide an evidence base on the rural economy, the focus has primarily been on businesses and the economy. Therefore, whilst it is recognised that planning policy and implementation of this needs to have regard to multiple, wide ranging and sometimes competing interests, consideration of these is outside the scope of the work, so the planning related issues identified here only reflect issues of importance to the business community and for business growth.

Many of the above recommendations from the Roger Tym Report have been taken into consideration in the more recent formulation of policy in Wiltshire, however as far as the Swindon Council area is concerned there is a clear preference for focusing development in the urban areas.

Further comment from the Head of Economic Development at Swindon Borough Council was that there is a Swindon 2050 Vision/Plan currently under development – this may, of course, affect

businesses in rural areas and there may be an opportunity to influence future policy through the process of this being developed and brought into the legislative framework.

It has not been possible within the scope of this study to analyse the actual applications submitted for business space in rural areas in each Council area and to see which have and have not been successful. What is certain from various interviews is that such applications are often complex and sometimes on the verge of policy guidelines and that such applications would often benefit from support from the Councils to guide them through the Planning and other support systems.

There are mixed views of how well the Planning systems operates, as you would expect these largely vary according to how well certain applications have gone. There is a theme though that resources within the Planning teams are tight and that it is often difficult to get schemes that will provide good employment and economic development opportunities prioritised.

Analysis of Currently Available Space

Set out below are 3 tables covering the BA, SP and SN Postcodes and to total for Wiltshire and Swindon. The geographical coverage of the analysis includes only the rural areas of the LEP area. The dataset is derived from Co-Star as at early March and is a snapshot in time.

No property availability database covers every property on the market as this depends on the activity of property agents and some properties not marketed by agents are excluded. Therefore we have included additional data such as is available e.g. making sure the space facilitated by the LEP such as Market Hall Dezives is included.

Retail

Table 6

All BA Sq Ft	Retail	
	Sq Ft	No of Units
0-500	-	-
500-1,000	4,350	6
1,000-5,000	1,767	1
5,000+	7,484	1
Total	13,601	8

Table 7

All SN Sq Ft	Retail	
	Sq Ft	No of Units
0-500	2,993	9
500-1,000	3,200	5
1,000-5,000	12,992	7
5,000+	-	-
Total	19,185	21

Table 8

All SP Sq Ft	Retail	
	Sq Ft	No of Units
0-500	139	1
500-1,000	1,761	2
1,000-5,000	9,591	4
5,000+	-	-
Total	11,491	7

Table 9

Rural Total Sq Ft	Retail	
	Sq Ft	No of Units
0-500	3,132	10
500-1,000	9,311	13
1,000-5,000	24,350	12
5,000+	7,484	1
Total	44,277	36

The above analysis shows that there are not huge amounts of available retail space available in any category of size. Obviously, large retail space would not be envisaged in rural areas anyway. This might be an indicator of a strong retail economy, however it might also be the case that there are rural hubs that are lacking in opportunity for new businesses to start. It needs to be examined whether the rural hubs have capacity to grow their physical offering for retail space or whether the turnover of existing properties and currently available space is sufficient to optimise economic growth.

PHOTOGRAPH REMOVED
Pinkney Park Workspace, Sherston

Industrial

Table 10

All BA Sq Ft	Industrial	
	Sq Ft	No of Units
0-1,000	-	-
1,000-5,000	13,224	5
5,000-10,000	32,419	4
10,000-50,000	79,530	3
50,000+	-	-
Total	125,173	12

Table 11

All SN Sq Ft	Industrial	
	Sq Ft	No of Units
0-1,000	1,650	2
1,000-5,000	34,067	12
5,000-10,000	13,252	2
10,000-50,000	145,064	6
50,000+	-	-
Total	194,033	22

Table 12

All SP Sq Ft	Industrial	
	Sq Ft	No of Units
0-1,000	-	-
1,000-5,000	42,324	17
5,000-10,000	5,776	1
10,000-50,000	30,718	2
50,000+	72,098	1
Total	150,916	21

Table 13

Rural Total Sq Ft	Industrial	
	Sq Ft	No of Units
0-1,000	1,650	2
1,000-5,000	89,615	34
5,000-10,000	51,447	7
10,000-50,000	255,312	11
50,000+	72,098	1
Total	470,122	55

This analysis indicates that there are only small start up industrial spaces in the SN postcodes, however all areas are reasonably well provided with space of 1,000 to 5,000 sq ft which shows that first grow on space for industrial occupiers is less of an issue. There is little vacant supply of larger space of up to 50,000 sq ft and this may be an issue for growing businesses, however at this scale they are more likely to gravitate to urban centres in order to attract appropriate levels of staffing.

Office

Table 14

All BA Sq Ft	Office	
	Sq Ft	No of Units
0-500	-	-
500-1,000	1,316	2
1,000-5,000	10,928	4
5,000+	5,089	1
Total	17,333	7

Table 15

All SN Sq Ft	Office	
	Sq Ft	No of Units
0-500	2,426	11
500-1,000	2,126	4
1,000-5,000	13,307	7
5,000+	33,709	5
Total	51,568	27

Table 16

All SP Sq Ft	Office	
	Sq Ft	No of Units
0-500	-	-
500-1,000	6,988	10
1,000-5,000	22,781	7
5,000+	18,083	2
Total	47,852	19

Table 17

Rural Total Sq Ft	Office	
	Sq Ft	No of Units
0-500	2,426	11
500-1,000	10,430	16
1,000-5,000	47,016	18
5,000+	56,881	8
Total	116,753	53

Again for offices, other than in the SN postcode there is little/no supply of vacant small offices. Supply of larger offices is a bit better for businesses of up to 5,000 sq ft, say 40-50 people. A summary of available property by postcode can be found at Appendix 6.

5. Strengths, Weaknesses, Opportunities and Threats

Swindon & Wiltshire REP SWOT Overview

STRENGTHS

- Beautiful area
- Proximity to the M4/M5 in the north of the area
- Good road access for visitors to the north of the area
- Staff retention is good

WEAKNESSES

- Lack of Higher Education provision
- Lack of grow on space for businesses.
- Lack of high speed broadband and mobile phone signal
- Lack of public/sustainable transport
- Lack of good north-south road links
- Difficulties recruiting staff, particularly higher skilled staff and younger staff at graduate level
- Loss of young people from the area
- Lack of co-ordination for identification of suitable sites for developments/inward investment
- Lack of visitor bedspaces (4,000??)
- Lack of long term visions for rural hub towns
- Much employment land being owned by residential developers where there is less appetite for development of business space, particularly for small businesses
- Lack of allocated employment land in rural areas
- Perceived and actual difficulties in easily obtaining planning consent

OPPORTUNITIES

- Opportunities for a third day visitor attraction in the east of the area to complement Stonehenge/Salisbury (could be Salisbury Plain Heritage Centre)
- Opportunity to develop a Higher Education facility with Dyson/others
- Opportunity for rural businesses to participate in cluster growth - e.g. life sciences centred on Great Western Hospital, Swindon and science, defence and security cluster centred on Porton Down or a new advanced design/engineering cluster West of Salisbury
- Utilise value or location of public sector assets to develop further space for small businesses
- As 5G proposals are developed, seek to influence better coverage in rural areas prior to roll out
- The army rebasing programme in 2019 will potentially provide benefits to local businesses e.g. workforce availability
- Opportunity post Brexit to develop a regional rather than a national approach to support for businesses, to reflect regional circumstances such as for farming

THREATS

- Uncertainties due to Brexit, particularly for businesses that export/import or in receipt of EU funds - especially land based businesses, such as farms.
- Development of land in rural areas continues to be held back by difficulties in gaining planning consent. Nimbysism identified by many businesses as a barrier to development.
- Development held back by the costs of upgrades to the electricity and other utility networks
- Ongoing difficulties with access to finance - particularly asset finance for embedded equipment

Sectors

Strengths

As described in the analysis section, there is projected to be growth in GVA in all sectors across the LEP area, but with some differences between Swindon and Wiltshire and with GVA in some sectors projected to grow more strongly than others.

The LEA 2016 identifies 3 broad sectors that contribute most to the LEP area's economy: Distribution, Transport, Accommodation and Food; Public Administration, Education and Health; and Production, comprising 52% of GVA.

Of the rural sectors forecasts to 2013-2021, the largest sectors in terms of GVA are Production, followed by Professional, scientific and technical then Construction, comprising 33.1% of the forecast rural area GVA. The fastest growing rural sectors in terms of projected sector GVA growth 2013-21, are Construction (41%), followed by Information & communications (32.6%) and then Production (31.1%). Food and Accommodation services also shows strong projected growth at 30.6%. Seven other sectors: Agriculture, forestry & fishing, Motor vehicle trade, Business administration & support services, Retail trade, Health, Property and Transport & storage inc. postage, Professional, scientific & technical Arts, Entertainment & other services have projected GVA growth 2013-21 between 18-30%.

PHOTOGRAPH REMOVED

Wentworth Wooden Jigsaws, Pinkney Park, Sherston GWP Packaging, Cricklade

Weaknesses

Sectors with projected lower GVA forecasts 2013-21 between 2.4-12% include: Financial & insurance services, Wholesale trade and Education and Public administration & defence.

As described in the analysis section, the sector with the lowest projected growth in GVA 2013-21 across the rural LEP area is Public administration & defence at 2.4%. This forms a much larger part of the economy of rural Wiltshire than Swindon, in part due to the large military presence across Wiltshire. The low projected growth in GVA is in contrast with the growth in local business units in this sector 2009-13. The growth in local business units was explored through interviews and it was thought that this was most likely due to outsourcing of services by the military and other public sector agencies during this period. Future growth was also examined through interviews and the low forecast GVA growth to 2021 is likely due to continued cuts to military and other public sector bodies during this period. The growth in GVA 2013-21 in this sector across the whole LEP area is also the lowest of all sectors, but higher than the rural areas at 6.0.

Opportunities

Opportunities for rural businesses to participate in cluster growth, for example life sciences centered on Great Western Hospital, Swindon and science, defence and security cluster centered on Porton Down or develop new centres of excellence, such as advanced design and engineering West of Salisbury.

Threats

If investments to support business growth are focussed on urban areas, whilst this may benefit some rural businesses, it is also likely to disadvantage many more and could result in reduced forecast growth and a two speed economy, with rural businesses lagging behind their urban counterparts.

Possible actions to optimise growth of the economy

In post Brexit planning, consideration should be given for regional, rather than national management of support for certain sectors that have been in receipt of EU funds to reflect regional circumstances, which can vary greatly from one region to another. One of example of this would be support for farming and land based businesses.

Skills/access to skills

Strengths

There is a demand for a range of skills within the rural economy to support the existing business base and future growth.

There is a University Technology College (UTC) in Swindon, described on its website as ‘an innovative, employer-focused, high-tech college for students aged from 14 to 19, specialising in Engineering with Business and Entrepreneurship. UTC Swindon is different to an existing traditional school – we deliver first class education in an environment that feels like the ‘workplace’. This is achieved by delivering the curriculum through employer set ‘projects’ which tackle real industry issues.’

Launched in January 2017, the Swindon and Wiltshire LEP supported Skills Support for the Workforce (SSW) is a programme developed to upskill employees within small and medium-sized enterprises (SMEs) in Swindon & Wiltshire. Over 50 businesses have already benefited from the programme. Provided by Serco, it delivers recognised accredited qualifications and bespoke training courses to enhance your employees’ skills, increase the competitiveness of your business and boost the local economy across the following priority sectors:

- Advanced Engineering and High Value Manufacturing
- Health and Life Science
- Financial and Professional Service
- Digital and Information and Communications Technology
- Construction
- Land Based Industries
- Visitor Economy
- Adult Health and Social Care
- Low Carbon Economy

Weaknesses

The lack of a university in Swindon and Wiltshire means that students have to leave the area to attend university. Only 32% of students return to the area to take up their first job, so there is a loss

of people, particularly young people, with higher level skills to the area (LEA, 2016). There were differences in the views of interviewees as to whether the lack of a university/establishing a university in the area was/will have an impact on businesses in the rural areas, from it definitely being a barrier to business growth to making no difference at all.

There are differences between Swindon and Wiltshire in terms of qualifications of the workforce relative to the resident population, with Swindon being a net *importer* of graduates (almost 4000), and Wiltshire being a net *exporter* of graduates (c9000) (LEA, 2016). Given the larger rural areas in Wiltshire compared with Swindon, this indicates that large numbers of the higher qualified workforce are commuting out of the rural areas to access employment.

Challenges in attracting skilled staff was identified by 7 businesses & 3 support organisations interviewed.

However, whilst this research has been focussed on the rural areas of Swindon & Wiltshire, it was not possible to study commuting patterns to employment outside the area, but 21% of the businesses we interviewed had staff who commuted from outside the area, all of these were Wiltshire based businesses. These were mainly staff in the higher paid, skilled and managerial roles. This supports the LEA 2016 finding that there is some in commuting into the area and presents opportunities to encourage people in those roles to relocate into the area, so the local economy benefits from the secondary spend of these higher paid workers as residents. This shows there is a complex picture of in-commuting and out-commuting from area for employment.

The Higher Skills programme described below faces challenges in accessing businesses, particularly micro and small businesses, as they are focussing all their limited resources on developing the business. Given the large number of small and micro businesses in the rural areas, it is likely that support available from the Higher Futures team may have less of an impact here than in the more urban areas.

There is a lower than average number of businesses in the LEP area offering apprenticeships, although information from interviews with businesses may mean that this does not paint the full picture. Some businesses have developed their own approaches for developing skills, particularly of young people, as find formal apprenticeships are not appropriate with reasons given including distances apprentices have to travel to college are too great.

Awareness amongst businesses interviewed of opportunities to access support to develop/access skills was low.

Opportunities

The LEP has recognised the challenge in meeting the existing and future demand for skilled workers and has set up the Higher Futures programme to address this by identifying business skills gaps through a training needs analysis and sourcing suitable higher education training provision.

Through this, skills gaps that have been identified are:

- Digital
- Management/professional skills
- STEM skills
- Manufacturing skills.

The following sectors have been identified as facing the biggest challenges in attracting skilled staff:

1. Digital/IT. 1 business recruits staff from India. This is the most difficult sector to recruit & retain skilled staff, with anecdotal evidence of poaching of staff from bigger businesses
2. Food & drink manufacturing. Young people are not attracted to work in this sector
3. Engineering businesses

Opportunities to develop a Higher Education facility with Dyson/other hi-tech businesses.

The Higher Futures team is in the early stages of developing a pilot programme with 6 businesses & Wiltshire colleges to tackle STEM skills needs.

The number of people who will be arriving in the area due to the military resettlement programme offers an opportunity to develop and retain skills needed in the local economy.

Threats

The higher skills deficit may make businesses move out of the area. Whilst the Higher Futures team is only aware of 2 businesses so far who have indicated they may have to do this, with most businesses wanting to remain in the area if possible, this number may increase if recruiting a skilled workforce becomes more challenging.

Difficulties in recruiting a skilled workforce, combined with challenges of lack of public transport and loss of higher qualified young people from the area may be a barrier to growth of the rural economy, with business choosing to set up or expand in other locations.

In addition, evidence through interviews supports that it is particularly difficult to recruit any young people, particularly at a higher skills level. Reasons given for this include 'Young people are particularly difficult to attract to rural areas, as think it will adversely affect career progression' and 'whilst we have a young staff who like bright lights, we recently lost one potential staff member, as was too rural'.

Possible actions to optimise growth of the economy

If the Higher Future pilot programme for developing STEM skills with 6 businesses and Wiltshire college is a success, this could be expanded and extended to address other skills gaps, such as digital and management/professional skills.

Build on existing work to forge stronger links with the military through their Career Transition Partnership to ensure that skills needs in the rural parts of the LEP area are recognised and a process identified with participants as to how they can be supported to develop these skills.

A study of travel to work/commuting patterns and skills levels of the rural population and rural workforce would provide more detailed information about in-commuting/out-commuting and level of skills of the rural resident and rural business workforce. This could be used as a platform to map rural areas/sectors skills requirements and opportunities for planning rural resident and business skills matching.

Property/land related Issues

Strengths

The existing LEP supported business and enterprise centre network, TEN has proved a success as evidenced by the occupancy levels and demand for small business units.

SWLEP's LEA acknowledges the importance of property availability – see this extract:

'The availability of a balanced supply of employment land and workspace is critical in encouraging inward investment and local economic growth and the forthcoming Employment Land Review and Assessment of Functional Economic Areas will enable the LEP to assess its strengths and weaknesses in this regard.'

Weaknesses

Despite the importance of property availability, there is in fact a lack of small and medium sized business space. There is a particular shortfall light industrial and office space across the majority of Swindon and Wiltshire – notably offices up to 500 sq ft and from 500 – 1000 sq ft and of industrial up to 1,000 sq ft.

This is further evidenced by the fact that businesses that are growing are finding it difficult to identify readily available space to move into and this is causing them to look outside the LEP area. In interviews, 9 businesses identified that lack of suitable business premises was a barrier to business growth. Medium sized grow on space 10,000sqft+ was the biggest gap identified. Three of these face immediate challenges securing suitable medium sized business premises combined B1/B2 uses. One may have to move to an urban area within Wiltshire.

Lack of suitable sites/properties was specifically highlighted as a barrier to growth of one of the LEPs 'one to watch' sectors – Tourism; in particular lack property/sites for developing the accommodation offer. Given that staying visitors contribute more to the local economy in terms of direct and secondary spend than day visitors, this is an important areas to develop.

There is market failure for property development of smaller business units and speculative development is very limited.

Most smaller rural hub towns do not have masterplans. This results in a lack of focus and clarity about the long term vision for those settlements and can lead to certain types of development not happening in the ideal location within those towns.

The planning system does not appear to allow prioritisation of applications that could support significant employment opportunities and hence economic growth.

A number of interviewees reported that constraints in the capacity of the electricity, gas and other utilities is increasing the cost of development to the extent that it is delaying or preventing development from occurring altogether.

Opportunities

Whilst this study has not examined the ownership of publicly owned land and buildings – it is known to be extensive. There is an opportunity in future years to bring more of this into use as employment land, whether through direct development or through partnership arrangements with the private sector.

There are many farms with underutilised buildings and these present an opportunity for development and diversification of use.

There is a time limited opportunity to use funds from the European Structured Investment Fund to support property development.

Threats

It is understood that a number of the medium to larger sized housebuilders have control of some of the areas of allocated employment land. There is a concern amongst property agents that these landowners are not really interested in developing the land for employment uses, rather they are holding onto the land in the hope of eventually gaining consent for residential development.

There is a perceived difficulty in gaining planning permission for development of property providing employment uses in rural areas and conflicting views as to whether this is actual as well as perceived.

Whilst many small businesses do not attract business rates due to the size of their operation, as soon as they grow to have more than one location, then business rates are payable on all of their buildings. This acts as a disincentive to growth.

Possible actions to optimise growth of the economy

Review of publicly owned land and buildings that could be utilised for speculative property development or sold in order to provide funds for development at other sites.

Investigation of how to further encourage conversion and development of farm buildings for employment uses.

Establishment of relationships with Western Power distribution, Transco and others. This is to establish where there are issues, whether they are likely to affect current employment land development and if so how such effects might be mitigated. A procedure for assisting businesses that wish to develop or to relocate into the area could also be established.

Development of masterplans for rural hub towns with wide ranging consultation of the community could be used to help define the purpose of those towns and to identify employment opportunities and locations to optimise sustainable development. This should include analysis of retail, industrial and office space within each location and assessment of likely future needs to ensure economically sustainable growth.

Provision of direct support for organisations that wish to locate to or develop within rural areas to help guide them through the process and to co-ordinate and smooth the input of public sector agencies.

Development of a new commercial property database to replace the current one that is not felt by property agents to be well maintained. This might involve a partnership with an existing database service such as CoStar or similar.

Transport & Connectivity

Strengths

The links to the M4 and M5 in the north of the LEP area provide good access for businesses, both in terms of access to customers and suppliers, but also for visitors to the area, as large parts of the LEP area are within the 2 hour drive time that is assessed as the maximum travel time visitors use when planning trips.

The Great Western Railway providing good access for the north of the LEP area to London and south Wales. Train connections to the mainline allow for ease of access to mainline stations at Swindon and Chippenham and onward connections.

Weaknesses

Lack of public or accessible transport was identified by 5 interviewees as a barrier to staff recruitment, particularly of young people. This is particularly for mainline train stations which are only located in the North – Chippenham and Swindon.

4 businesses interviewed identified poor road maintenance/planning as a challenge for their businesses.

The A303 was identified as a barrier to normal business operations with congestion at peak times changing how the sales team in one business operates. A dual carriageway is needed & several interviewees mentioned problems with lack of good North-South road links.

Opportunities

Highways England recognises that the remaining 35 miles of single carriageway on the route of the A303/A358 represent bottlenecks and a barrier to having an expressway to the South West from London. Under their Roads Investment Strategy to 2020 they are committed to:

- upgrade all remaining sections of the A303 between the M3 and the A358 to dual carriageway standard
- create a dual carriageway link from the M5 at Taunton to the A303

This work comes in 3 packages:

- A303 Amesbury to Berwick Down
- A303 Sparkford to Ilchester
- A358 Taunton to Southfields

It is important that SWLEP are involved in the current consultation exercise and participate to ensure that rural parts of the area have the appropriate level of access to support the rural and wider economies.

Threats

In the medium to long term the lack of speedier North South road connections stifles business and businesses locate elsewhere.

Possible actions to optimise growth of the economy

Introducing/expanding accessible independent transport solutions, particularly for young people to enable access to further and higher education opportunities, apprenticeships and employment opportunities. Examples of this could include an expansion of the Wheels to Work programme managed by Community First.

There is an opportunity to have input into the design of the connections and layout for the A303 to seek to ensure that this is done in a way that anticipates the impact of future growth spots within the area.

A review of the future adequacy of North-South road and other transport connections combined with taking into account the likely impact of planned future economic and residential development might identify the most significant barriers to economic growth in terms of transport links. The economic impact of possible improvements could then be assessed.

Communications

Strengths

The LEA 2016 states 'It is estimated that superfast broadband was available to 54% of premises in Wiltshire between June 2013 and July 2014, which is well below the national average (75%). However, there is on-going investment of £20 million to ensure that 91% of the county will have access to superfast broadband by 2016. In Swindon, it is estimated that superfast broadband was available to 80% of premises in the borough between June 2013 and July 2014. Swindon has an aspiration to increase coverage from 80% to 99.4% of households in Swindon Borough by 2016.'

Swindon and Wiltshire LEP have set a target of 100% superfast broadband coverage. See Appendix 7 for a map of planned broadband coverage across Wiltshire. More detailed maps will be available shortly.

Weaknesses

Whilst much work has been done on maximising the total number of locations to have fast broadband connections, It is not clear and there is no available data to identify the proportion of businesses that have the facility. Indeed due to State Aid rules the work to invest in a larger number of connections has treated homes and businesses equally.

The LEA (2016) states 'In terms of digital infrastructure, broadband coverage and performance is worse in rural areas and in Wiltshire it is poor when compared to more urban councils.' This was supported by interviews with businesses, with 9 businesses identifying lack of access to high speed broadband as a barrier to business growth and 5 businesses identifying lack of or poor mobile phone coverage as a barrier to growth.

Opportunities

The current work on providing superfast broadband could be used as a springboard to ensure future development of broadband is targeted at businesses.

Given that the LEP has set a target of having 100% superfast broadband coverage across the whole LEP area, but as a number of rural businesses interviewed have said their broadband speed is poor, then the LEP may want to consider interim options to boost broadband speed in some of the harder to reach rural areas, where it will take time to receive superfast broadband. One possibility that could be considered is the pilot Long Reach VDSL project that currently is being trialled by Openreach in 6 remote rural locations, the first commercial trial of the technology, which increases broadband speeds over very long phone lines.

5G technology is currently being developed with roll out expected in 2020. It has the potential to assist with providing data connections to more rural locations within the area at a lower cost than provision of fixed cable connections.

Threats

Without understanding whether there are locations that do not or will not have good access to superfast broadband when businesses are looking to relocate it will be too late to do something about it and the opportunity for those businesses will be lost.

Possible actions to optimise growth of the economy

It is considered that a piece of work should be undertaken to analyse the current business locations, allocated employment land and rural hub towns where there will still be a lack of superfast broadband following completion of the contract that is due to be let in May 2017.

Explore how the new 5G network and any planned further development of the 4G network can reach all geographical parts of the LEP area. Include in this how the restrictions of the ANOB can be circumvented in order to ensure there are no coverage blackspots. All technological and regulatory aspects should be considered including facilities to encourage a denser network of masts with further reaching power.

Review the requirements within the Planning system of the extent to which both residential and commercial property development have to have superfast broad connections. Connection to superfast broadband should be considered in the same way as connecting utilities. Consideration of this could prevent future problems occurring which require public sector support.

6. Case studies:

Whilst every rural business is unique, the following two case studies have been selected as examples of where rural businesses within the Swindon and Wilshire LEP area have been facing particular challenges and constraints to business growth.

The Trapeze case study is an example of a business having to relocate from a rural to an urban area within Wiltshire due to lack of available premises in rural areas. The Longleat Enterprises Ltd case study demonstrates how a large rural business may not be able to invest in a long planned for project that would deliver significant local economic benefits due to, amongst other things changes in exchange rates beyond their control due to Brexit. It is for the LEP to decide whether these are areas that need any action, for example in the case of Trapeze, is it important for the LEP to support a growing business to remain in a rural area, or is its priority that the business would remain within the wider LEP area even if it is a loss to the rural area.

Case study 1	<p style="text-align: center;">Longleat Enterprises Ltd.</p> <div style="border: 1px solid black; width: 80%; margin: 0 auto; padding: 20px;"> <p style="text-align: center;">PHOTOGRAPH REMOVED</p> </div>
The business	<p>Longleat estate is a nationally important visitor attraction, comprising a grade 1 listed stately home, 1,000 acre Registered Parkland, safari and adventure park; 2nd only in Wiltshire in terms of visitor numbers to World Heritage site Stonehenge. Since 2014, visitor numbers have grown by 10% year on year, with just under 1m visitors in 2016. Its visitors stay on average for 7 hours and just over 40% of its travel for over 2 hours to reach Longleat. An economic impact analysis of visitors to Longleat in 2015 calculated that Longleat visitors contributed £122.9m to the local economy through secondary spending. In addition, total business turnover within the county/its locality that is attributed to Longleat having an influence over is £115.9m. It employs 600FTE staff currently, supports a further 166 FTE jobs through indirect and induced expenditure attributed to the estate and is estimated to have an influence over 1,700FTE jobs across the County.</p>
Future plans	<p>There are plans to develop a £45m, 240 room hotel resort with water park and 150-200 delegate business conference facility on part of the Longleat estate at Tascroft near Warminster, on the junction of the A36 and A362. It is a site that is outside the Registered Park and the Cranbourne Chase AONB. This will address the demand for additional quality family orientated accommodation for staying visitors, forecast to reach 150,000 bed stays by year 5 of operation. It will support an estimated 250 jobs through the 2- year construction period and create 300 FTE new jobs once open, when the contribution to the local economy directly attributed to Longleat visitors is set to rise to £161.6m. An Outline Planning application for this Hotel Resort and Wiltshire Tourism “hub” has been submitted.</p>
Strategic fit	<p>This development will make a significant contribution to growing the visitor economy of the area, which is one of the Swindon & Wiltshire LEPs ‘Sectors to watch’. It will create jobs and increase leisure and business visitor “staying nights” to the area and Longleat has already shown to be able to effectively market the “off-peak”.</p> <p>A 2016 accommodation study by Visit Wiltshire identified a lack of accommodation at peak visitor periods and also a lack of large hotels and business conference facilities, which is acting as a barrier in developing the area’s visitor economy.</p>

Barriers to growth	<ul style="list-style-type: none"> ● Disjointed approach by government departments to facilitate the planning and economic development process. ● Planning. Whilst a designated senior planning officer has been assigned to manage the planning application and full support comes from key stakeholders in the County, there are no systems in place to expedite strategically important planning applications for commercial schemes that will deliver jobs and long term, sustainable economic growth for the area. The planning assessments are often undertaken on... <ol style="list-style-type: none"> 1. individual issues that aren't joined up unless one can guarantee the other. 2. a "what if" culture ensuring worst case assumptions are made as a way of avoiding future criticism. 3. an aim for each department /formal consultee to extract some "planning gain" that would be diluted in a joined-up approach that (iv) leaves no room for common sense. ● In fact, other than being eventually considered by a Strategic Planning Committee, the process Longleat is experiencing is no different than an individual home owner, just more thorough, deeper in its consultation and more expensive. ● Longleat Enterprises Ltd had planned to provide the funding for the development of the hotel resort. However, the elongated process, planning costs (currently estimated to be £1.2m) and changes in the exchange rate since 2016, means that the costs of the hotel and water park development are now beyond the upper threshold originally identified in the feasibility study. Unless costs can be mitigated, the development and the significant economic benefits it would bring to the area will not be realised. The business will be forced to focus on developments overseas where government led incentives to encourage Longleat, with its prestigious brand association and excellent reputation for developing and managing a world class tourist attraction, are being offered.
Potential solutions	<ul style="list-style-type: none"> ● Costs could be reduced and incentives created by: <ul style="list-style-type: none"> ○ Providing infrastructure funding for strategically important schemes. ○ Reducing the planning fees levied by local Government. ○ Reduce the Corporation Tax for businesses, following a major investment in strategically recognised schemes with a defined economic impact. ● Reduce the level and depth of public and third party consultation at an Outline (conceptual) stage of the Planning process to ensure strategically aligned developments do not have front loaded costs and a delay in getting to market, that reduces the scope of development and decreases competitive advantage through a very public and protracted process. ● Properly empower the Officers at a County level – best placed to holistically see the impact across the County. ● Ensure once supported and known to be strategically aligned, that the Planning process cannot be held up by an individual or third party consultee challenging one aspect of the development in isolation (e.g. PROW judicial review about a deletion of a footpath). ● Abolish S106 contributions for job creation and economic impact led developments, that are strategically aligned with the County's goals, as these only "ransom" the business and further increase costs.

Case study 2	<p style="text-align: center;">Trapeze Group</p> <p style="text-align: center;">PHOTOGRAPH REMOVED</p>
The business	<p>Trapeze Group is a software business selling across the UK to public and private sector. It is a fast growing business, employing 70 staff, with 4 business locations across the UK. The headquarters is at Staverton, Wiltshire</p>
Future plans	<p>Trapeze are a growing business and are looking to relocate this year for more space and because it is hard to get clients to their current location, as no mainline trains and road network poor. They are considering moving to Chippenham, as is the best option for them – availability of space was key and it's a good environment to attract staff. They are staying in Wiltshire because of existing staff and not wanting to lose them. One option being considered is moving 70 members of staff to Methuen Business Park, Chippenham to premises 6,500 – 7,000 sq ft.</p>
Strategic fit	<p>The work of Trapeze group fits within the LEPs strategic priority 3, Digital capability.</p>
Barriers to growth	<ul style="list-style-type: none"> • The current location in Staverton is difficult for recruiting staff and it is particularly difficult to recruit young people. Lack of public transport does not help, however retention of people that do join is good, in part due to rural location. • Lack of suitable grow on space in the area <p>Pace of business growth and change means skilled staff difficult to recruit</p>
Potential solutions	<ul style="list-style-type: none"> • Trapeze Group are considering moving from a rural to an urban part of Wiltshire. The lack of available grow on space in rural areas is a barrier has also been identified by other businesses during this study. Developing suitable, affordable grow on space for businesses in rural locations will help retain businesses and staff in these areas. <p>Developing accessible transport solutions for rural locations will improve staff recruitment, particularly for young people</p>

7. Conclusions and Recommendations

This has been a wide-ranging study of the rural economy of the Swindon and Wiltshire LEP area. Whilst every attempt has been made to assess all aspects of the rural economy, the scope of work has enabled only indicative assessments, for example of the value and growth of the rural economy and further work may be needed to provide more detailed information in specific areas.

Issues that did not emerge through this study as priorities to rural businesses/the rural economy included energy and the low carbon economy, climate change and affordable housing. This may be because the focus of the study has been on business aspects of the rural economy and does not necessarily mean that these areas are unimportant for sustaining a vibrant rural economy in the future.

Recommendations for actions and further work are identified below:

Swindon & Wiltshire LEP priorities

Priority sectors

The LEP has identified 5 priority sectors:

- Advanced engineering and high value manufacturing
- Health and life sciences
- Financial and professional services
- Digital and information and communications technology
- Land-based industries.

and 4 'Sectors to watch':

- Visitor economy
- Adult health and social care
- Low carbon economy
- Construction

The priority sectors will benefit from specific work to 'exploit the potential for high-value, higher-skilled economic growth and smart specialisation in the future.' Whilst the 'Sectors to watch' are recognised as 'important to the Swindon and Wiltshire economy, for example in terms of scale or service delivery, but which may not be driven by innovation, experience high growth or support higher skilled higher value employment', but will be monitored to see if any support is required in the future.

Whilst some of these, such as construction are aligned with CE broad sectors, others such as the Visitor Economy cut across a number of CE broad sectors including Accommodation and Food Services and Arts, Entertainment & Other services.

The sectors with the fastest indicative assessment of projected percentage GVA growth in the rural areas are:

Construction; 41% growth 2013-21

Information & Communications; 32.6% growth 2013-21

Production; 31.1% growth 2013-21

Food and Accommodation services; 30.6% growth 2013-21

Of these, Construction, Information and Communications and Production are all included in the LEPs priority sectors. Food and Accommodation services form an important part of the Visitor Economy sector and so a recommendation for this as an important growth sector of the rural economy would be:

- Include Food and Accommodation services in the Visitor Economy sector and given that 2012-16 delivered 4 consecutive years of record visitor numbers to the LEP area, consider whether this should also be one of the LEPs Priority sectors.

PHOTOGRAPHS REMOVED

Farmstay near Corsham

Longleat House, Warminster

The largest sectors in terms of indicative forecast GVA 2013-21 are Production, followed by Professional, scientific and technical then Construction, together comprising 33.1% of the forecast rural area GVA by 2021 and all of these form part of the LEPs priority sectors.

LEP key priorities

The LEP has also identified 5 key priorities in its revised Strategic Economic Plan (SEP) 2016. These are considered below in terms of issues identified facing the rural businesses and the rural economy and recommendations for actions.

1. ***'Skills and talent - we need an appropriately skilled and competitive workforce to achieve our growth ambitions.'***

There are a large number of priority actions identified in the SEP 2016 to address skills needs in the area as follows:

Skills system:

- Ensure there is a robust and responsive post 16 education and skills sector operating to meet the needs of learners and employers which is financially efficient, sustainable and operates from campuses which are fit for purpose;
- Improve progression routes to employment in the post 16 education sector, with strong employer involvement in the curriculum to ensure improved employability;
- Deliver options to enhance higher education participation across Swindon and Wiltshire meeting the demand for higher level and degree-level qualified employees locally; and
- Ensure that the learning and skills offer reflects the needs of the area, including the priority sectors, providing effective Science Technology Engineering and Maths (STEM) skills.

Skills for growth:

- Develop a skilled and competitive workforce meeting the needs of employers;

- Develop higher level skills provision through smarter engagement between the higher and further education sectors and business;
- Achieve a higher proportion of individuals employed in higher skilled and higher value-added roles (Level 4 and above) in priority sectors;
- Embed apprenticeships as an established route to employment and maximise the opportunities to grow higher and degree apprenticeships.

Skills for inclusion:

- Improve educational attainment, exceeding the national average, at age 16 (including English and Maths) and at age 19;
- Realise the potential of residents with barriers to employment, including young people and older workers and develop innovative approaches to providing support;
- Ensure impartial and independent professional careers advice and guidance is operating across schools and colleges.

Enabler of other priorities:

- Ensure military service leavers and existing employees have clear pathways to new skills and flexible learning.

This study has found that there is a skills deficit facing rural businesses, particularly at the higher skills levels, which is a barrier to rural business growth. Actions identified in the revised SEP would help to address this, but in delivering these, need to be tailored to the needs of rural businesses and specific recommendations are:

- If the Higher Future pilot programme for developing STEM skills with 6 businesses and Wiltshire college is a success, this could be expanded and extended to address other skills gaps, such as digital and management/professional skills and delivered in locations/ways that are accessible for rural businesses.
- Build on existing work to forge stronger links with the military through their Career Transition Partnership to ensure that skills needs in the rural parts of the LEP area are recognised and a process identified with participants as to how they can be supported to develop these skills.
- Improve promotion of business skills development opportunities to rural businesses, particularly small and micro businesses, such as the Higher Futures and Skills Support for the Workforce.

Further research needed:

- Work should be undertaken to examine the potential for developing a university within Swindon and Wiltshire LEP area, to include the impacts on rural businesses.
- A study of travel to work/commuting patterns and skills levels of the rural population and rural workforce would provide more detailed information about in-commuting/out-commuting and level of skills of the rural resident and rural business workforce. This could be used as a platform to map rural areas/sectors skills requirements and opportunities for planning rural resident and business skills matching.

2. ***Transport infrastructure improvements - we need a well connected, reliable and resilient transport system to support economic and planned development growth at key locations.*** The priority actions identified for this are:

- Deliver key road junction and infrastructure improvements to support economic and planned development growth;
- Deliver a whole corridor approach to traffic management and maintenance on key routes to improve reliability and resilience;
- Deliver packages of integrated transport schemes to support the development and regeneration plans for Chippenham, Salisbury, Swindon and Trowbridge;
- Deliver rail capacity and connectivity improvements to support economic growth and help realise improved travel opportunities;
- Lobby Government to address the unreliability of north-south road connections in the sub-region to support development and business growth both across Swindon and Wiltshire, and in neighbouring LEP areas;
- Lobby Government and work with Highways England, Network Rail, train operating companies and other key bodies to improve key strategic routes to the Midlands and south coast ports, Cardiff, Bristol and the Thames Valley, London and South East, and South West.

The priority actions are mainly focussed on urban centres and strategic infrastructure, which will benefit some rural businesses closer to these locations. There are, however, a number of transport recommendations; some of which are infrastructure related and some of which are at a service level that will further support the priority actions to benefit rural business growth:

- Introducing/expanding accessible independent transport solutions, particularly for young people to enable access to further and higher education opportunities, apprenticeships and employment opportunities. Examples of this could include a new Wheels to Work programme.
- There is an opportunity to have input into the design of the connections and layout for the A303 to seek to ensure that this is done in a way that supports existing rural business needs and anticipates the impact of future growth spots within the area.
- A review of the future adequacy of North-South road and other transport connections combined with taking into account the likely impact of planned future economic and residential development might identify the most significant barriers to economic growth in terms of transport links. The economic impact of possible improvements could then be assessed.

3. ***‘Digital capability - we need to deliver excellence in digital connectivity and cyber transformation to achieve business growth, innovative public services and influence societal change’.***

All 3 of the SEP priority actions have the potential to support rural businesses growth:

- ‘Develop and implement a Digital Technologies Strategy to support business growth, inward investment, skills development and public sector resource efficiency;
- Deliver 100% high-speed broadband and mobile coverage and prepare for the delivery of ultrafast broadband;
- Support business and residents to take up and maximise their use of additional broadband capacity to support business growth and community development.’

Superfast or high speed digital connectivity is essential for rural businesses to sustain and grow. When implemented, these priority actions in the SEP 2016 will support this, but as the LEA 2016

recognises broadband coverage in rural areas is much worse than in urban areas. Mobile phone coverage is also highly variable across rural areas and both are barriers to rural business growth. The recommendations below will further support the priority actions to deliver growth of rural businesses:

- Explore how the new 5G network and any planned further development of the 4G network can reach all geographical parts of the LEP area. Include in this how the restrictions of the AONB can be circumvented in order to ensure there are no coverage blackspots. All technological and regulatory aspects should be considered including facilities to encourage a denser network of masts with further reaching power.
- Review the requirements within the Planning system of the extent to which both residential and commercial property development have to have superfast broad connections. Connection to superfast broadband should be considered in the same way as connecting utilities. Consideration of this could prevent future problems occurring which require public sector support.

Further research needed:

- A piece of work should be undertaken to analyse the current business locations, allocated employment land and rural hub towns where there will still be a lack of superfast broadband following completion of the contract that is due to be let in May 2017.

4. ***‘Place shaping - we need to deliver the infrastructure required to deliver our planned growth and regenerate our City and Town Centres, and improve our visitor and cultural offer.’***

The place shaping priority actions will support some rural business growth, through supporting the:

- sustainable development of market towns and rural communities to ensure the right economic, social and visitor infrastructure is in place to ensure their long term resilience and safeguard their attractiveness’
- developing a strong visitor economy resulting in new investment as well as increased trade, visitor spend and national and international staying visitors’.

The recommendations below will further support this and build on existing work at a local level, such as Neighbourhood Plans:

- Review of publicly owned land and buildings that could be utilised for speculative property development or sold in order to provide funds for development at other sites.
- Given the lack of appropriate grow on spaces identified, particularly for mixed B1/B2 uses, there needs to be investigation of how to further encourage conversion and development of farm buildings for employment uses.
- Establishment of relationships with Western Power distribution, Transco and others. This is to establish where there are issues in power supply capacity and connections and whether they are likely to affect current/future employment land development and if so how such effects might be mitigated.

- Linked to the recommendation above, establish a procedure for assisting businesses that wish to develop or to relocate into the area that co-ordinates the interests of public sector agencies, and private utilities/services.
- In view of recent and future changes at a national level, establish an exceptional procedure for supporting businesses should significant changes mean that future investment in the area is jeopardised. Areas of support that could be considered include: reducing the planning fees levied by local Government, providing infrastructure funding for strategically important schemes and reducing the Corporation Tax for businesses, following a major investment in strategically recognised schemes with a defined economic impact.
- Development of masterplans for rural hub towns with wide ranging consultation of the community could be used to help define the purpose of those towns and to identify employment opportunities and locations to optimise sustainable development. This should include analysis of retail, industrial and office space within each location and assessment of likely future needs to ensure economically sustainable growth.
- Provision of direct support for organisations that wish to locate to or develop within rural areas to help guide them through the process and to co-ordinate and smooth the input of public sector agencies.
- Development of a new commercial property database to replace the current one that is not felt by property agents to be well maintained. This might involve a partnership with an existing database service such as CoStar or similar.

5. ***‘Business development - we need to strengthen the competitiveness of small and medium sized businesses and attract a greater share of foreign and domestic investment into the area.’***

There are a large number of priority actions identified in the SEP 2016 to support this as follows:

Business support

- Deliver the Swindon and Wiltshire Growth Hub to support the needs of SMEs;
- Address the low rates of business formation by improving access to specialist public and private business support providers;
- Support a network of incubation units meeting the needs of start-up and micro businesses;
- Support the Government’s aspiration that 25% of public sector contracts are fulfilled by SMEs.

Inward investment

- Build on our national reputation for innovation and world-class assets to attract inward investment;
- Develop internationally recognised clusters of digital technologies and life sciences activity by building premises, capacity and linkages between research and development and manufacturing capabilities;
- Strengthen the advanced manufacturing sector supply chain.

Smart specialisation

- Develop Swindon and Wiltshire as a nationally significant player in the UK's energy sector, with particular strengths in the low carbon energy generation sector and the application of hydrogen technologies;
- Support smart specialisation and innovation in our priority sectors as the drivers of economic growth.

Given the high proportion of SMEs in the rural areas, including micro businesses the priority actions identified in the SEP 2016 will support rural business growth. The following recommendations will further support the priority actions to benefit rural business growth.

- Develop opportunities for rural businesses to participate in cluster growth, for example life sciences centered on Great Western Hospital, Swindon and science, defence and security cluster centered on Porton Down or possible new centres of excellence, such as advanced design and engineering west of Salisbury. The possibility of developing virtual clusters linked to existing and emerging clusters should be explored. This has the potential of opening up more opportunities to businesses operating in these sectors, but currently disadvantaged from participating in clusters due to their rural locations. Capability to participate in these will be facilitated by the LEP priority of rolling out superfast broadband across all rural areas.
- Rural businesses access many different types of business support, both formal and informal, but there appears to be a low level of awareness of what support is available. Consideration needs to be given to strengthen promotion of business support services, particularly to small and micro businesses, that can be delivered in ways that are accessible for rural businesses. Areas of support identified include marketing and use of social media.
- Linked to recommendations in the Place shaping section above, given the high occupancy rates of incubation units provided through TEN, consideration should be given to expanding provision of incubation space and appropriate grow on spaces.
- Consideration should be given to develop schemes that support development of local supply chains across all the sectors.

Growth Zones

The LEP has identified 3 Growth Zones: the Swindon-M4 Growth Zone, the A350 Growth Zone and the Salisbury A303 Growth Zone where there are 'large agglomerations of economic activity with the greatest capacity for supporting sustainable growth in the future.' Based on a 'geographic concentration of people and business has been shown to contribute towards improved economic performance and productivity, delivering wider economic benefits as a consequence.'

The growth zones do include some rural areas, but there is a danger that by focussing support in these areas, as whilst this may benefit some rural businesses, it is also likely to disadvantage many more and could result in reduced forecast growth and a two-speed economy, with rural businesses lagging behind their urban counterparts. This will be compounded if LEP supported projects are mainly located in urban areas, as whilst any individual project may have only limited detrimental impact on the rural economy, the cumulative detrimental impact of successive projects developed in urban locations on the economy of rural areas could be significant.

It is recommended that:

- In supporting the development of the Growth Zones, a rural proofing exercise is undertaken for each scheme and for the cumulative impact of project delivery to ensure that opportunities can be developed for rural businesses and steps taken to mitigate any potential adverse impacts.

Rural Productivity Commission

The South West LEPs have set up a Rural Productivity Commission in April 2017 to examine issues around rural productivity and growth. As identified earlier, there are no Rural Economic Plans across all these areas. A recommendation would be:

- To develop assessments of the rural economies in each of the South West LEP areas would enable a useful direct comparison across the region.

Brexit

In general, following the Brexit vote confidence amongst rural businesses appears to be high, but it is recognised that this could change very quickly depending upon how the Brexit negotiations develop. All of the businesses who expressed a view on preferred outcomes of Brexit for their businesses wanted there to continue to be both tariff free trade with the EU and for there to be free movement of labour.

There was particular concern from land based businesses, such as farms of the impact of Brexit on their businesses and a call for early decisions to be made on future support for the sector as they have to plan further ahead than annual budget cycles.

Labour supply from Eastern Europe for some businesses, such as hotels has dried up since the Brexit vote.

Recommend that:

- Opportunities should be explored for post Brexit regional management/co-ordination of public funds for business support for sectors, such as farming that have regional variations and have been supported by EU funds.
- Opportunities explored to maintain the flow of labour supply from EU members states in the short, medium and long term.

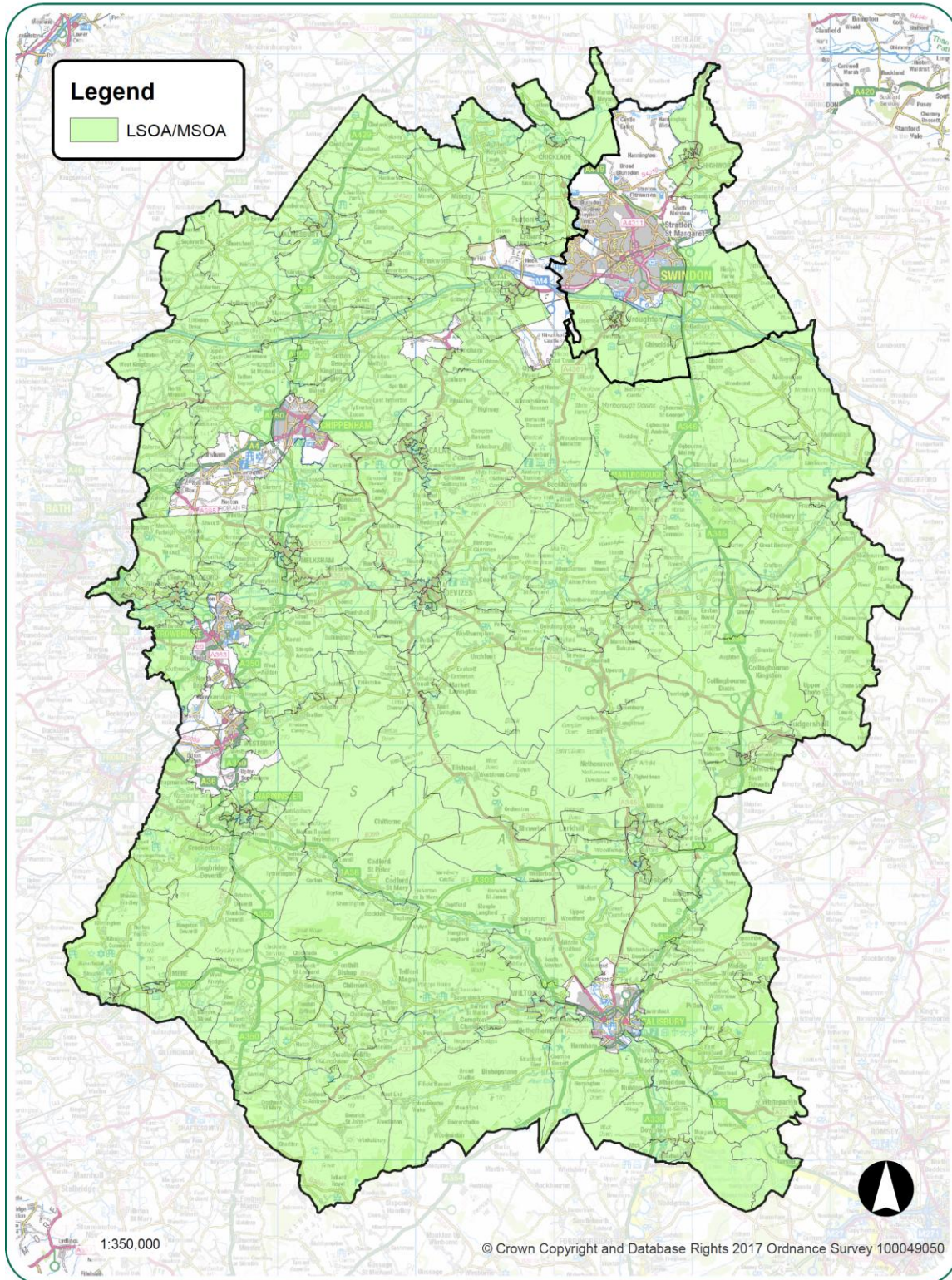
Further work

A number of pieces of research have been identified above, in addition to this there are a number of areas that warrant further study. These include:

- Impacts of climate change on the rural economy
- Economic contribution of eco-systems services
- Links between rural economic development and affordable rural housing provision

Report photo credits: Rhona Pringle, except Longleat courtesy of Longleat Enterprises Ltd.

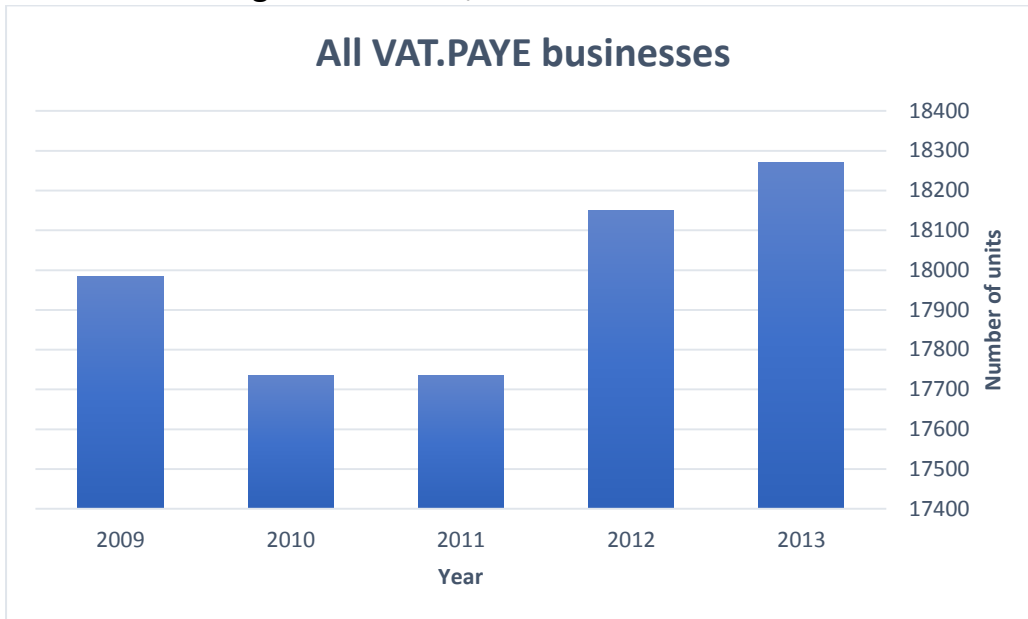
Appendices. Appendix 1: Map of Swindon & Wiltshire rural areas



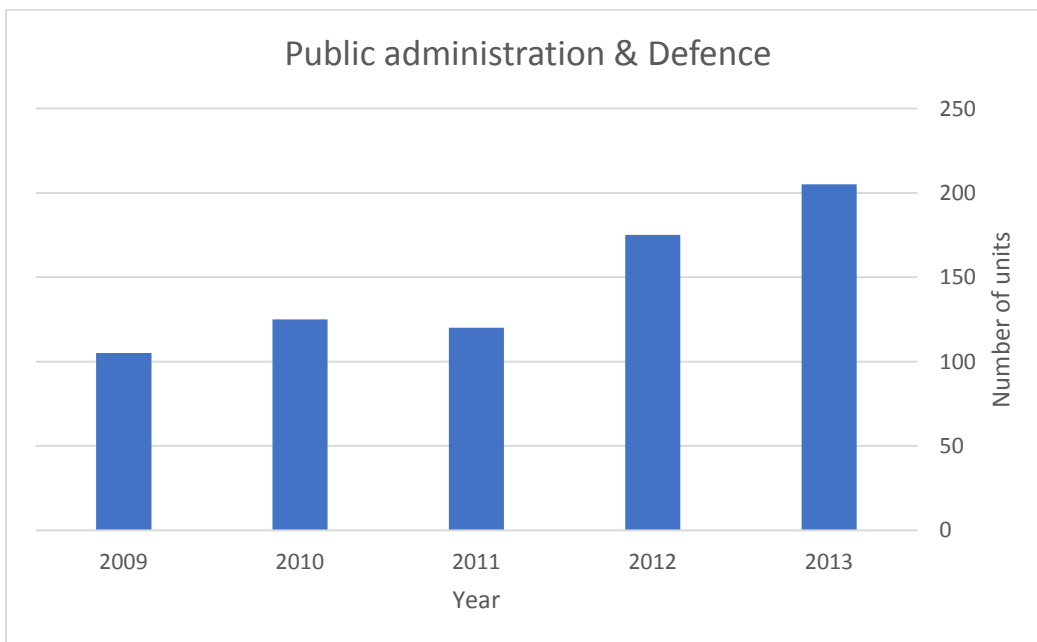
Appendix 2: Swindon and Wiltshire Rural Framework
Electronic copy provided

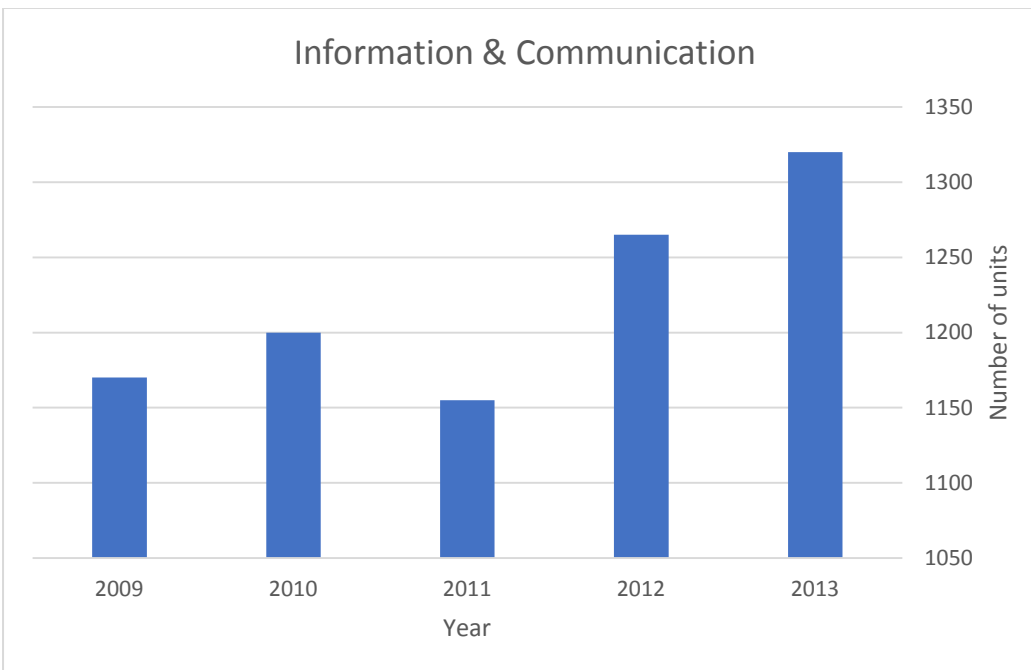
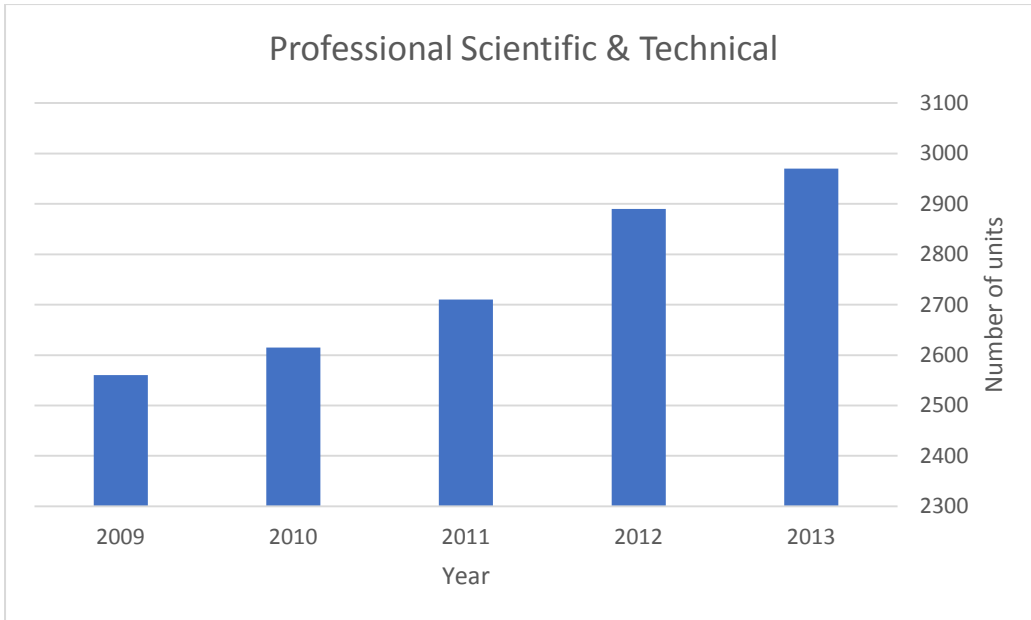
Appendix 3: Charts of Sectoral trends in rural areas – changes in No of local business units (est.)

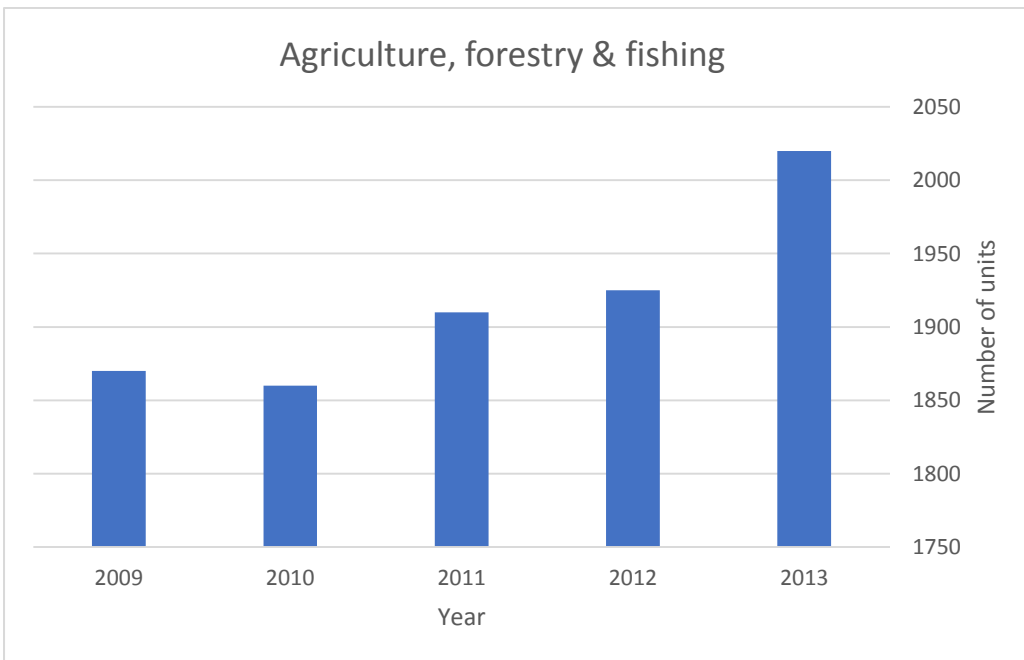
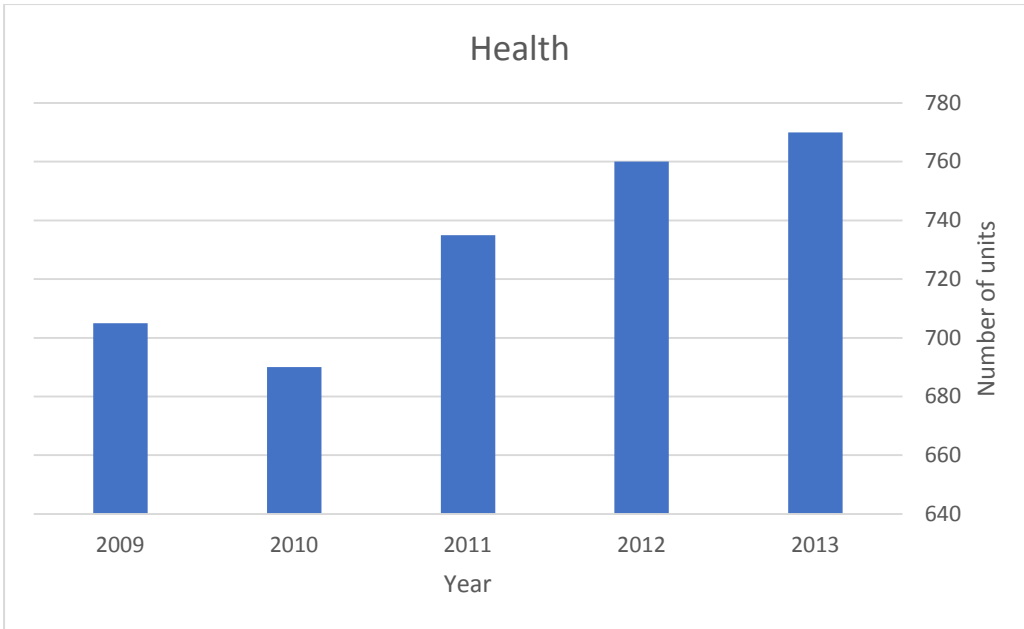
Overall growth in VAT/PAYE business units 2009-13



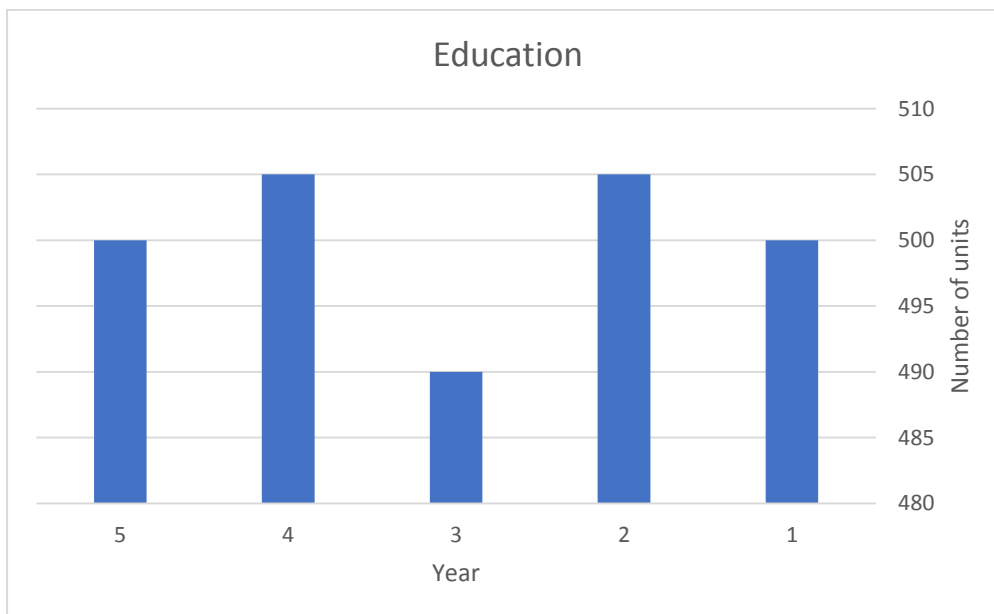
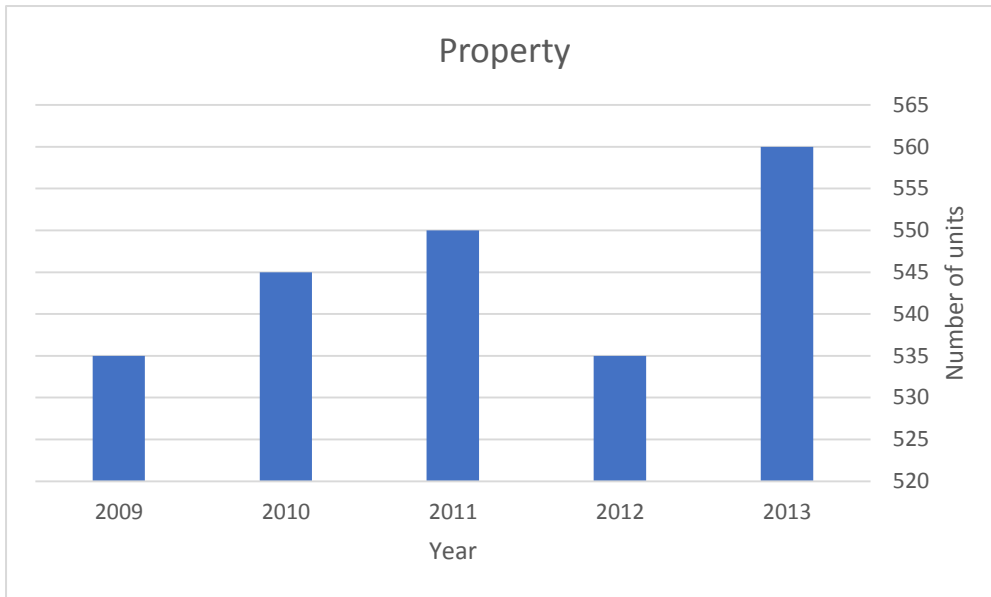
Growth sectors

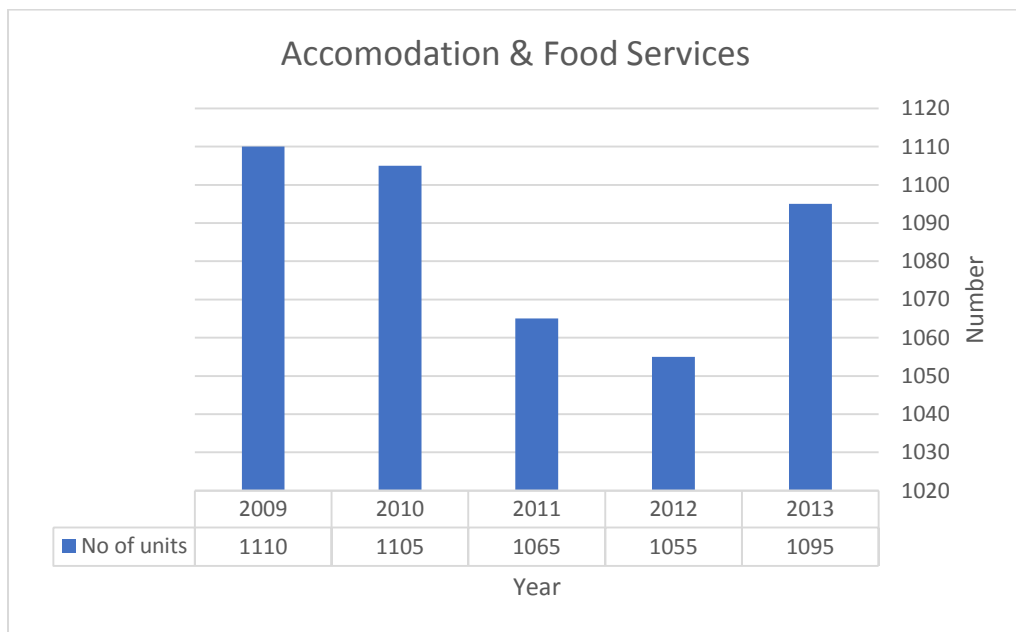


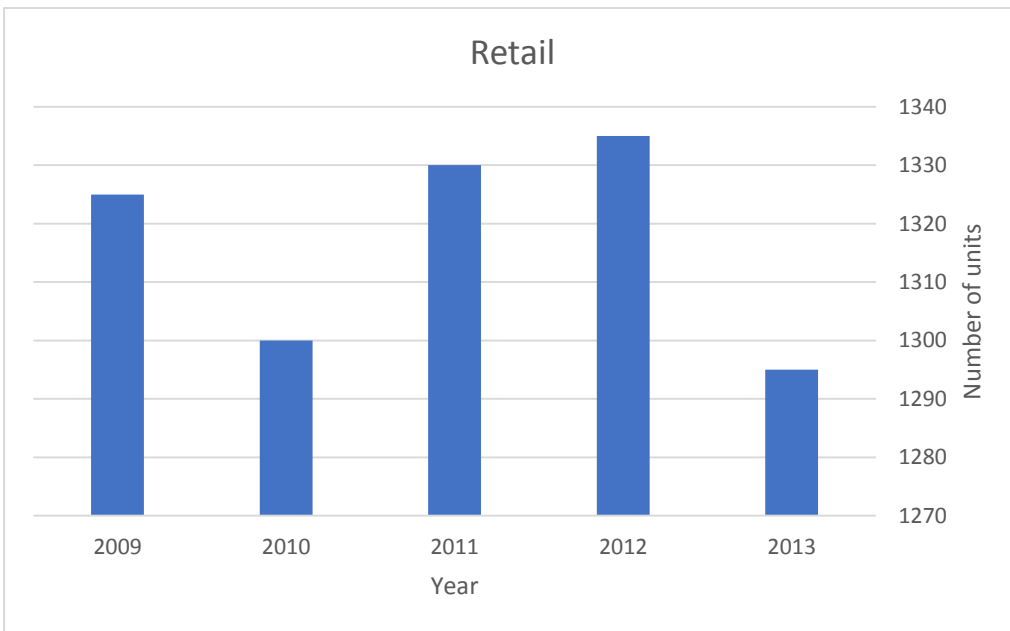
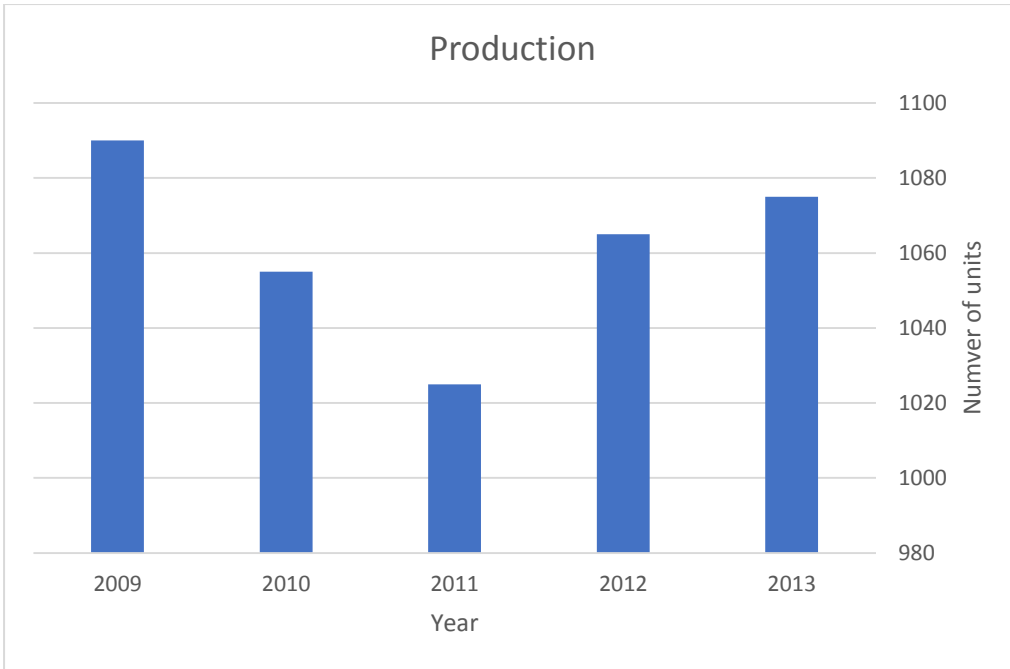


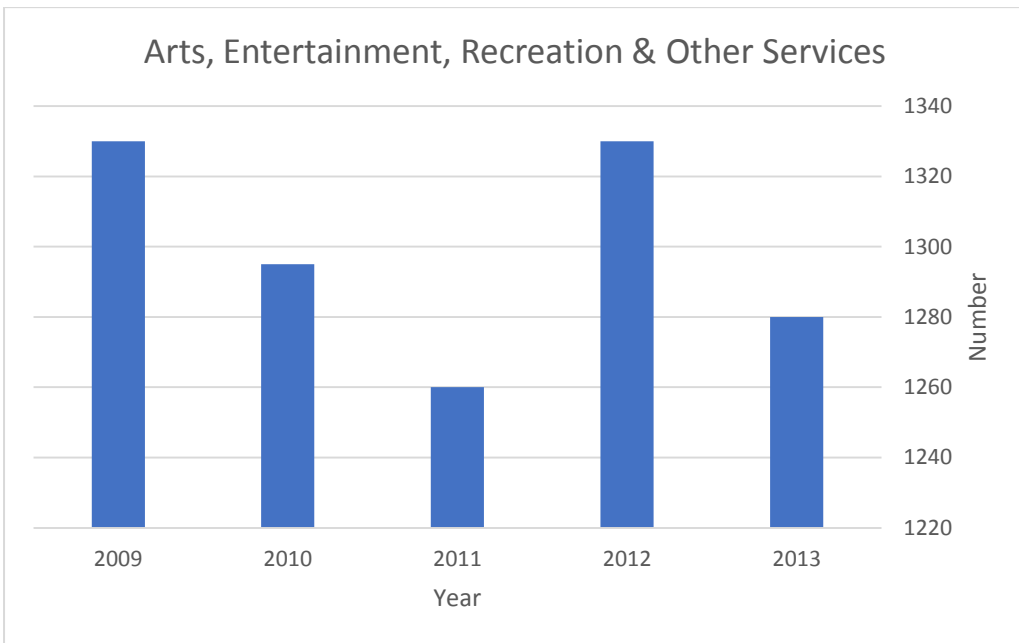


Stable Sectors (low variation in growth or shrinkage of No of units)

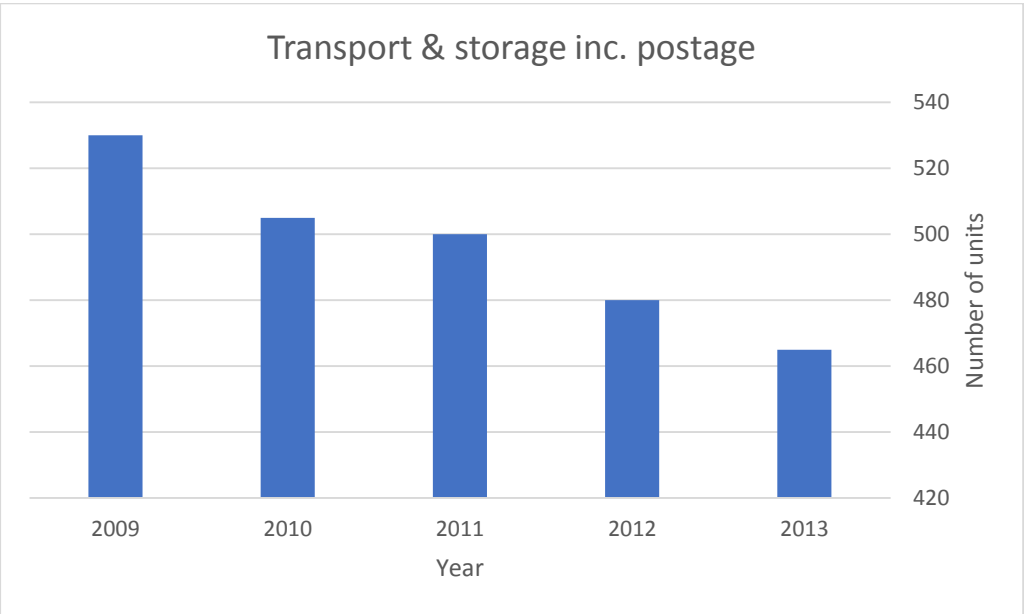
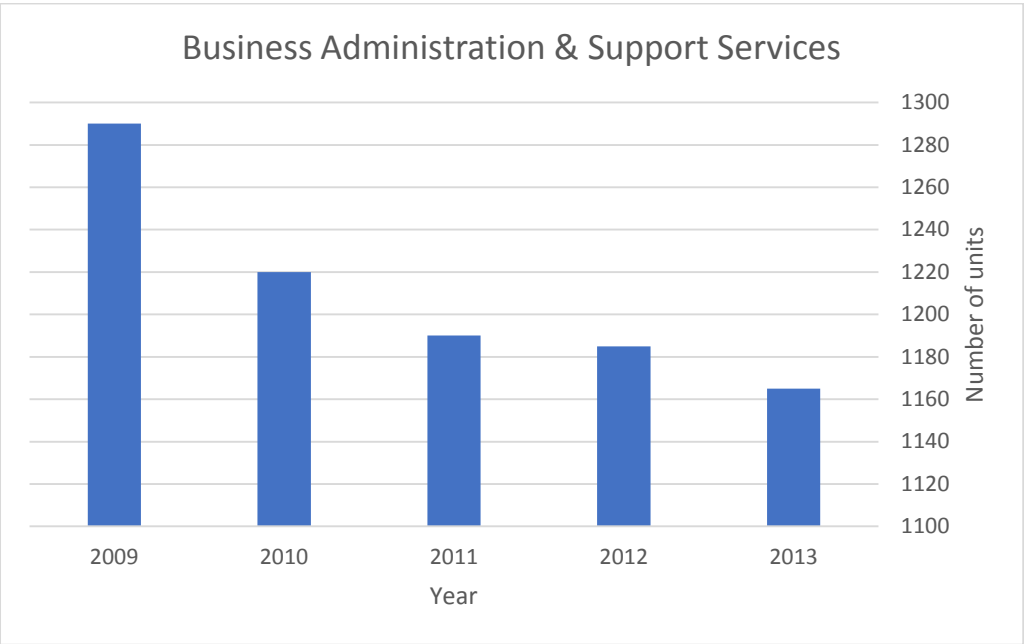


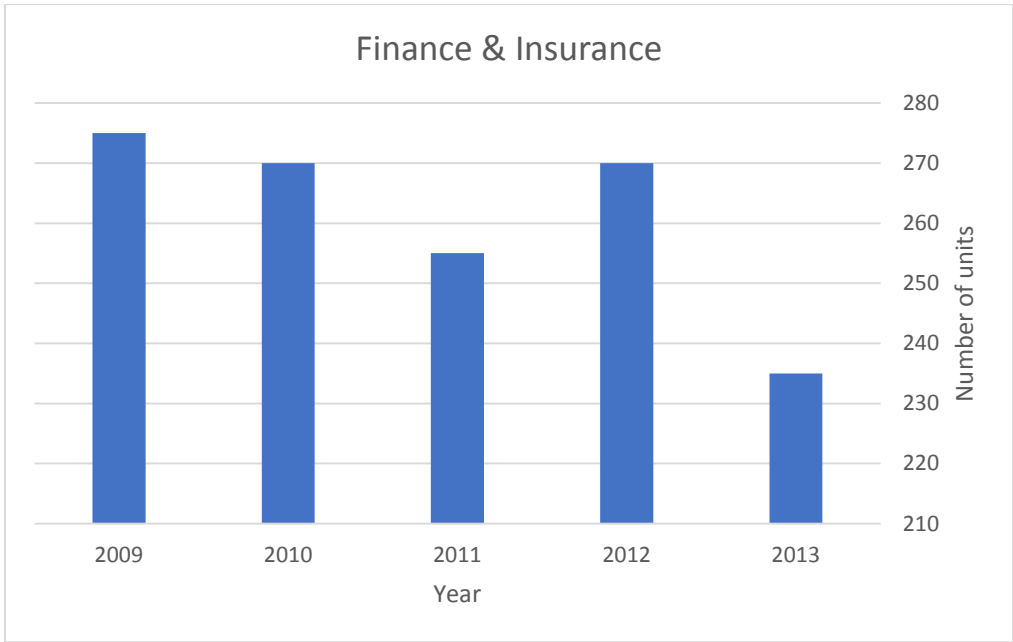






Shrinking sectors (2009-13)





Source: ONS (2015)

Appendix 4: Sectoral GVA projections

CE Broad sectors	Swindon GVA 2013 (£m CE)	Wiltshire GVA 2013 (£m CE)	Total Swindon & Wiltshire GVA (£m)2013 CE)	Swindon Rural GVA 2013 (£m est)	Wiltshire Rural GVA 2013 (£m est)	Total Swindon & Wiltshire Rural GVA 2013 (£m) est	Swindon GVA 2021 (£m est)	Wiltshire GVA 2021 (£m est)	Total Swindon & Wiltshire GVA 2021 (£m) est	Swindon Rural GVA 2021 (£m est)	Wiltshire Rural GVA 2021 (£m est)	Total Swindon & Wiltshire Rural GVA 2021 (£m) est	Total Swindon & Wiltshire GVA projected change 2013-21 (est.)	Total Swindon & Wiltshire GVA % projected change 2013-21 (est.)	Swindon & Wiltshire rural GVA projected change 2013-21 (est.)	Swindon & Wiltshire rural GVA % projected change 2013-21 (est.)
1. Agriculture, forestry & fishing	19.697	103.484	123.181	2.088	68.196	70.284	17.389	134.383	151.772	1.843	88.558	90.401	28.591	23.2%	20.117	28.6%
2. Production	1682.8	1247.85	2930.65	178.376	822.333	1000.709	2389.3	1606.4	3995.7	253.266	1058.618	1311.884	1065.05	36.3%	311.175	31.1%
3. Construction	248.158	638.566	886.724	26.305	420.815	447.12	357.971	899.122	1257.093	37.945	592.521	630.466	370.369	41.8%	183.346	41.0%
4. Motor vehicle trade	159.774	254.871	414.645	16.936	167.960	184.896	204.961	325.8	530.761	21.726	214.7022	236.4282	116.116	28.0%	51.5322	27.9%
5. Wholesale trade	172.039	328.647	500.686	18.236	216.578	234.814	154.982	373.2	528.182	16.428	245.939	262.367	27.496	5.5%	27.553	11.7%
6. Retail trade	343.786	627.433	971.219	36.441	413.478	449.919	466.179	781.4	1247.579	49.415	514.9426	564.3576	276.36	28.4%	114.4386	25.4%
CE Broad sectors	Swindon GVA 2013 (£m CE)	Wiltshire GVA 2013 (£m CE)	Total Swindon & Wiltshire GVA	Swindon Rural GVA 2013	Wiltshire Rural GVA 2013	Total Swindon & Wiltshire	Swindon GVA 2021 (£m est)	Wiltshire GVA 2021 (£m est)	Total Swindon & Wiltshire	Swindon Rural GVA 2021	Wiltshire Rural GVA	Total Swindon & Wiltshire	Total Swindon & Wiltshire	Total Swindon & Wiltshire	Swindon & Wiltshire rural	Swindon & Wiltshire rural

			(£m)2013 CE)	(£m est)	(£m est)	Rural GVA 2013 (£m) est			GVA 2021(£m) est	(£m est)	2021 (£m est)	re Rural GVA 2021 (£m) est	GVA projecte d change 2013-21 (est.)	GVA % projecte d change 2013-21 (est.)	GVA projecte d change 2013-21 (est.)	GVA % projecte d change 2013-21 (est.)
7. Transport & storage inc. postage	322.977	295.648	618.625	34.236	194.832	229.068	442.2	353.4	795.6	46.873	232.891	279.764	176.975	28.6%	50.696	22.1%
8. Accommodation & food services	123.49	322.526	446.016	13.090	212.545	225.635	140.1	424.7	564.8	14.851	279.877	294.728	118.784	26.6%	69.093	30.6%
9. Information & communications	280.574	478.488	759.062	29.741	315.323	345.064	324.6	642.4	967	34.408	423.341	457.749	207.938	27.4%	112.685	32.6%
10. Financial & insurance services	728.531	614.601	1343.132	77.224	405.022	482.246	839.687	682.449	1522.136	89.007	449.734	538.741	179.004	13.3%	56.495	11.7%
CE Broad sectors	Swindon GVA 2013 (£m CE)	Wiltshire GVA 2013 (£m CE)	Total Swindon & Wiltshire GVA (£m)2013 CE)	Swindon Rural GVA 2013 (£m est)	Wiltshire Rural GVA 2013 (£m est)	Total Swindon & Wiltshire Rural GVA 2013 (£m) est	Swindon GVA 2021(£m est)	Wiltshire GVA 2021(£m est)	Total Swindon & Wiltshire GVA 2021(£m) est	Swindon Rural GVA 2021 (£m est)	Wiltshire Rural GVA 2021 (£m est)	Total Swindon & Wiltshire GVA 2021	Total Swindon & Wiltshire GVA projecte d change 2013-21	Total Swindon & Wiltshire GVA % projecte d change 2013-21	Swindon & Wiltshire rural GVA projecte d change 2013-21	Swindon & Wiltshire rural GVA % projecte d change 2013-21

												(£m) est	(est.)	(est.)	(est.)	(est.)
11. Property	101.623	370.437	472.06	10.772	244.118	254.89	136.864	451.293	588.157	14.508	297.402	311.913	116.097	27.1%	57.02	22.4%
12. Professional, scientific & technical	392.181	827.297	1219.478	41.571	545.189	586.76	430.7	982.8	1413.5	45.654	647.665	693.319	194.022	15.9%	106.559	18.2%
13. Business administration & support services	314.299	412.722	727.021	33.316	271.984	305.3003	349.535	526.039	875.574	37.051	346.660	383.711	148.553	20.4%	78.4107	25.7%
14. Public administration & defence	245.237	749.859	995.096	25.995	494.157	520.152	293.212	761.316	1054.528	31.080	501.707	532.787	59.432	6.0%	12.635	2.4%
15. Education	268.872	635.926	904.798	28.500	419.075	447.575	292.196	699.77	991.966	30.972	461.148	492.12	87.168	9.6%	44.545	10.0%
CE Broad sectors	Swindon GVA 2013 (£m CE)	Wiltshire GVA 2013 (£m CE)	Total Swindon & Wiltshire GVA (£m)2013 CE)	Swindon Rural GVA 2013 (£m est)	Wiltshire Rural GVA 2013 (£m est)	Total Swindon & Wiltshire Rural GVA 2013	Swindon GVA 2021 (£m est)	Wiltshire GVA 2021 (£m est)	Total Swindon & Wiltshire GVA 2021 (£m est)	Swindon Rural GVA 2021 (£m est)	Wiltshire Rural GVA 2021 (£m est)	Total Swindon & Wiltshire Rural GVA	Total Swindon & Wiltshire GVA projected change	Total Swindon & Wiltshire GVA % projected change	Swindon & Wiltshire rural GVA projected change	Swindon & Wiltshire rural GVA % projected change

						(£m) est						2021 (£m) est	2013-21 (est.)	2013-21 (est.)	2013-21 (est.)	2013-21 (est.)
16. Health	275.848	604.095	879.943	29.240	398.097	427.337	319.4	745.5	1064.9	33.856	491.284	525.14	184.957	21.0%	97.803	22.9%
17. Arts, Entertainment & other services	200.159	416.703	616.862	21.217	274.607	295.824	227.9	493.4	721.3	24.157	325.151	349.308	104.438	16.9%	53.484	18.1%
Totals	5880.045	8929.153	14809.198	623.284	5884.309	6507.59	7387.176	10883.372	18270.548	783.04	7172.140	7955.180	3461.35	23.4%	1447.5875	22.2%

The estimates of sectoral GVA are based on the Cambridge Econometrics projections for the 2016 Local Economic Assessment using the percentage of rural populations in both Swindon and Wiltshire from the 2011 rural framework to provide the estimates of rural GVA.

GVA across the whole of Swindon & Wiltshire is forecast to increase by 23.4% 2013-21
Rural GVA forecast estimates are that there will be a 22.2% increase in GVA 2013-21

CE Broad sectors	Swindon GVA 2021 (£m CE)	Swindon rural GVA 2021 (est £m)	Swindon GVA 2016 (£m CE)	Swindon rural GVA 2016 (est £m)	Swindon GVA 2013 (£m CE)	Swindon rural GVA 2013 (est £m)	% change rural Swindon GVA 2013-2021 (est.)
1. Agriculture, forestry & fishing	17.389	1.843	15.487	1.642	19.697	2.088	-11.7
(% of rural GVA in that LAD in given year)		(0.2%)		(0.2%)		(0.3%)	
(% of total GVA in given LAD in that year)		(0.02%)		(0.02%)		(0.03%)	
CE Broad sectors	Wiltshire GVA 2021 (£m CE)	Wiltshire rural GVA 2021 (est £m)	Wiltshire GVA 2016 (£m CE)	Wiltshire rural GVA 2016 (est £m)	Wiltshire GVA 2013 (£m CE)	Wiltshire rural GVA 2013 (est £m)	% change rural Wiltshire GVA 2013-2021 (est.)
1. Agriculture, forestry & fishing	134.383	88.558	111.355	73.383	103.484	68.196	29.9
(% of rural GVA in that LAD in given year)		(1.2%)		(1.1%)		(1.2%)	
(% of total GVA in given LAD in that year)		(0.8%)		(0.8%)		(0.8%)	

CE Broad sectors	Swindon GVA 2021 (£m CE)	Swindon rural GVA 2021 (est £m)	Swindon GVA 2016 (£m CE)	Swindon rural GVA 2016 (est £m)	Swindon GVA 2013 (£m CE)	Swindon rural GVA 2013 (est £m)	% change rural Swindon GVA 2013-2021 (est.)
2. Production	2389.3	253.266	2098.6	222.451	1682.8	178.376	42.0
(% of rural GVA in that LAD in given year)		(32.3%)		(31.7%)		(28.6%)	
(% of total GVA in given LAD in that year)		(3.4%)		(3.4%)		(3.0%)	
CE Broad sectors	Wiltshire GVA 2021 (£m CE)	Wiltshire rural GVA 2021 (est £m)	Wiltshire GVA 2016 (£m CE)	Wiltshire rural GVA 2016 (est £m)	Wiltshire GVA 2013 (£m CE)	Wiltshire rural GVA 2013 (est £m)	% change rural Wiltshire GVA 2013-2021 (est.)
2. Production	1606.4 (13.4%)	1058.618	1413.849	931.726	1247.85	822.333	28.7
(% of rural GVA in that LAD in given year)		(14.8%)		(14.5%)		(14.0%)	
(% of total GVA in given LAD in that year)		(9.7%)		(9.6%)		(9.2%)	

CE Broad sectors	Swindon GVA 2021 (£m CE)	Swindon rural GVA 2021 (est £m)	Swindon GVA 2016 (£m CE)	Swindon rural GVA 2016 (est £m)	Swindon GVA 2013 (£m CE)	Swindon rural GVA 2013 (est £m)	% change rural Swindon GVA 2013-2021 (est.)
3. Construction	357.971	37.945	307.938	32.641	248.158	26.305	44.2
(% of rural GVA in that LAD in given year)		(4.8%)		(4.6%)		(4.2%)	
(% of total GVA in given LAD in that year)		(0.5%)		(0.5%)		(0.5%)	
CE Broad sectors	Wiltshire GVA 2021 (£m CE)	Wiltshire rural GVA 2021 (est £m)	Wiltshire GVA 2016 (£m CE)	Wiltshire rural GVA 2016 (est £m)	Wiltshire GVA 2013 (£m CE)	Wiltshire rural GVA 2013 (est £m)	% change rural Wiltshire GVA 2013-2021 (est.)
3. Construction	899.122	592.521	773.453	509.705	638.566	420.815	40.8
(% of rural GVA in that LAD in given year)		(8.2%)		(7.9%)		(7.2%)	
(% of total GVA in given LAD in that year)		(5.4%)		(5.2%)		(4.7%)	

CE Broad sectors	Swindon GVA 2021 (£m CE)	Swindon rural GVA 2021 (est £m)	Swindon GVA 2016 (£m CE)	Swindon rural GVA 2016 (est £m)	Swindon GVA 2013 (£m CE)	Swindon rural GVA 2013 (est £m)	% change rural Swindon GVA 2013-2021 (est.)
4. Motor vehicle trade	204.961	21.726	192.882	20.446	159.774	16.936	28.3
(% of rural GVA in that LAD in given year)		(2.8%)		(2.9%)		(2.7%)	
(% of total GVA in given LAD in that year)		(0.3%)		(0.3%)		(0.3%)	
CE Broad sectors	Wiltshire GVA 2021 (£m CE)	Wiltshire rural GVA 2021 (est £m)	Wiltshire GVA 2016 (£m CE)	Wiltshire rural GVA 2016 (est £m)	Wiltshire GVA 2013 (£m CE)	Wiltshire rural GVA 2013 (est £m)	% change rural Wiltshire GVA 2013-2021 (est.)
4. Motor vehicle trade	325.8	214.702	306.164	201.762	254.871	167.960	27.8
(% of rural GVA in that LAD in given year)		(3.0%)		(3.1%)		(2.9%)	
(% of total GVA in given LAD in that year)		(2.0%)		(2.1%)		(1.9%)	

CE Broad sectors	Swindon GVA 2021 (£m CE)	Swindon rural GVA 2021 (est £m)	Swindon GVA 2016 (£m CE)	Swindon rural GVA 2016 (est £m)	Swindon GVA 2013 (£m CE)	Swindon rural GVA 2013 (est £m)	% change rural Swindon GVA 2013-2021 (est.)
5. Wholesale trade	154.982	16.428	151.231	16.030	172.039	18.236	-11.0
(% of rural GVA in that LAD in given year)		(2.1%)		(2.3%)		(2.9%)	
(% of total GVA in given LAD in that year)		(0.2%)		(0.2%)		(0.3%)	
CE Broad sectors	Wiltshire GVA 2021 (£m CE)	Wiltshire rural GVA 2021 (est £m)	Wiltshire GVA 2016 (£m CE)	Wiltshire rural GVA 2016 (est £m)	Wiltshire GVA 2013 (£m CE)	Wiltshire rural GVA 2013 (est £m)	% change rural Wiltshire GVA 2013-2021 (est.)
5. Wholesale trade	373.2	245.939	360.189	237.364	328.647	216.578	13.6
(% of rural GVA in that LAD in given year)		(3.4%)		(3.7%)		(3.7%)	
(% of total GVA in given LAD in that year)		(2.3%)		(2.4%)		(2.4%)	

CE Broad sectors	Swindon GVA 2021 (£m CE)	Swindon rural GVA 2021 (est £m)	Swindon GVA 2016 (£m CE)	Swindon rural GVA 2016 (est £m)	Swindon GVA 2013 (£m CE)	Swindon rural GVA 2013 (est £m)	% change rural Swindon GVA 2013-2021 (est.)
6. Retail trade	466.179	49.415	416.558	44.155	343.786	36.441	35.6
(% of rural GVA in that LAD in given year)		(6.3%)		(6.3%)		(5.8%)	
(% of total GVA in given LAD in that year)		(0.7%)		(0.7%)		(0.6%)	
CE Broad sectors	Wiltshire GVA 2021 (£m CE)	Wiltshire rural GVA 2021 (est £m)	Wiltshire GVA 2016 (£m CE)	Wiltshire rural GVA 2016 (est £m)	Wiltshire GVA 2013 (£m CE)	Wiltshire rural GVA 2013 (est £m)	% change rural Wiltshire GVA 2013-2021 (est.)
6. Retail trade	781.4	514.942	697.428	459.605	627.433	413.478	24.5
(% of rural GVA in that LAD in given year)		(7.2%)		(7.1%)		(7.0%)	
(% of total GVA in given LAD in that year)		(4.7%)		(4.7%)		(4.6%)	

CE Broad sectors	Swindon GVA 2021 (£m CE)	Swindon rural GVA 2021 (est £m)	Swindon GVA 2016 (£m CE)	Swindon rural GVA 2016 (est £m)	Swindon GVA 2013 (£m CE)	Swindon rural GVA 2013 (est £m)	% change rural Swindon GVA 2013-2021 (est.)
7. Transport & storage inc. postage	442.2	46.873	395.5	41.923	322.977	34.236	36.9
(% of rural GVA in that LAD in given year)		(6.0%)		(6.0%)		(5.5%)	
(% of total GVA in given LAD in that year)		(0.6%)		(0.6%)		(0.6%)	
CE Broad sectors	Wiltshire GVA 2021 (£m CE)	Wiltshire rural GVA 2021 (est £m)	Wiltshire GVA 2016 (£m CE)	Wiltshire rural GVA 2016 (est £m)	Wiltshire GVA 2013 (£m CE)	Wiltshire rural GVA 2013 (est £m)	% change rural Wiltshire GVA 2013-2021 (est.)
7. Transport & storage inc. postage	353.4 (16.1% with accommodation & food services, wholesale & retail trade)	232.891	315.627	207.998	295.648	194.832	19.5
(% of rural GVA in that LAD in given year)		(3.2%)		(3.2%)		(3.3%)	
(% of total GVA in given LAD in that year)		(2.1%)		(2.1%)		(2.2%)	

CE Broad sectors	Swindon GVA 2021 (£m CE)	Swindon rural GVA 2021 (est £m)	Swindon GVA 2016 (£m CE)	Swindon rural GVA 2016 (est £m)	Swindon GVA 2013 (£m CE)	Swindon rural GVA 2013 (est £m)	% change rural Swindon GVA 2013-2021 (est.)
8. Accommodation & food services	140.1	14.851	124.8	13.229	123.49	13.090	13.1
(% of rural GVA in that LAD in given year)		(1.9%)		(1.9%)		(2.1%)	
(% of total GVA in given LAD in that year)		(0.2%)		(0.2%)		(0.2%)	
CE Broad sectors	Wiltshire GVA 2021 (£m CE)	Wiltshire rural GVA 2021 (est £m)	Wiltshire GVA 2016 (£m CE)	Wiltshire rural GVA 2016 (est £m)	Wiltshire GVA 2013 (£m CE)	Wiltshire rural GVA 2013 (est £m)	% change rural Wiltshire GVA 2013-2021 (est.)
8. Accommodation & food services	424.7	279.877	370.21	243.964	322.526	212.545	31.7
(% of rural GVA in that LAD in given year)		(3.9%)		(4.0%)		(3.6%)	
(% of total GVA in given LAD in that year)		(2.6%)		(2.5%)		(2.4%)	

CE Broad sectors	Swindon GVA 2021 (£m CE)	Swindon rural GVA 2021 (est £m)	Swindon GVA 2016 (£m CE)	Swindon rural GVA 2016 (est £m)	Swindon GVA 2013 (£m CE)	Swindon rural GVA 2013 (est £m)	% change rural Swindon GVA 2013-2021 (est.)
9. Information & communications	324.6	34.408	284.8	30.189	280.574	29.741	15.7
(% of rural GVA in that LAD in given year)		(4.4%)		(4.3%)		(4.8%)	
(% of total GVA in given LAD in that year)		(0.5%)		(0.5%)		(0.5%)	
CE Broad sectors	Wiltshire GVA 2021 (£m CE)	Wiltshire rural GVA 2021 (est £m)	Wiltshire GVA 2016 (£m CE)	Wiltshire rural GVA 2016 (est £m)	Wiltshire GVA 2013 (£m CE)	Wiltshire rural GVA 2013 (est £m)	% change rural Wiltshire GVA 2013-2021 (est.)
9. Information & communications	642.4	423.341	539.9	355.794	478.488	315.323	34.2
(% of rural GVA in that LAD in given year)		(5.9%)		(5.5%)		(5.4%)	
(% of total GVA in given LAD in that year)		(3.9%)		(3.6%)		(3.5%)	

CE Broad sectors	Swindon GVA 2021 (£m CE)	Swindon rural GVA 2021 (est £m)	Swindon GVA 2016 (£m CE)	Swindon rural GVA 2016 (est £m)	Swindon GVA 2013 (£m CE)	Swindon rural GVA 2013 (est £m)	% change rural Swindon GVA 2013-2021 (est.)
10. Financial & insurance services	839.687	89.007	741.146	78.561	728.531	77.224	15.3
(% of rural GVA in that LAD in given year)		(11.4%)		(11.2%)		(12.4%)	
(% of total GVA in given LAD in that year)		(1.2%)		(1.2%)		(1.3%)	
CE Broad sectors	Wiltshire GVA 2021 (£m CE)	Wiltshire rural GVA 2021 (est £m)	Wiltshire GVA 2016 (£m CE)	Wiltshire rural GVA 2016 (est £m)	Wiltshire GVA 2013 (£m CE)	Wiltshire rural GVA 2013 (est £m)	% change rural Wiltshire GVA 2013-2021 (est.)
10. Financial & insurance services	682.449	449.734	606.217	399.497	614.601	405.022	11.0
(% of rural GVA in that LAD in given year)		(6.3%)		(6.2%)		(6.9%)	
(% of total GVA in given LAD in that year)		(4.1%)		(4.1%)		(4.5%)	

CE Broad sectors	Swindon GVA 2021 (£m CE)	Swindon rural GVA 2021 (est £m)	Swindon GVA 2016 (£m CE)	Swindon rural GVA 2016 (est £m)	Swindon GVA 2013 (£m CE)	Swindon rural GVA 2013 (est £m)	% change rural Swindon GVA 2013-2021 (est.)
11. Property	136.864	14.508	121.37	12.865	101.623	10.772	34.7
(% of rural GVA in that LAD in given year)		(1.9%)		(1.8%)		(1.7%)	
(% of total GVA in given LAD in that year)		(0.2%)		(0.2%)		(0.2%)	
CE Broad sectors	Wiltshire GVA 2021 (£m CE)	Wiltshire rural GVA 2021 (est £m)	Wiltshire GVA 2016 (£m CE)	Wiltshire rural GVA 2016 (est £m)	Wiltshire GVA 2013 (£m CE)	Wiltshire rural GVA 2013 (est £m)	% change rural Wiltshire GVA 2013-2021 (est.)
11. Property	451.293 (3.7%)	297.402	399.505	263.274	370.437	244.118	21.8
(% of rural GVA in that LAD in given year)		(4.1%)		(4.1%)		(4.1%)	
(% of total GVA in given LAD in that year)		(2.7%)		(2.7%)		(2.7%)	

CE Broad sectors	Swindon GVA 2021 (£m CE)	Swindon rural GVA 2021 (est £m)	Swindon GVA 2016 (£m CE)	Swindon rural GVA 2016 (est £m)	Swindon GVA 2013 (£m CE)	Swindon rural GVA 2013 (est £m)	% change rural Swindon GVA 2013-2021 (est.)
12. Professional, scientific & technical	430.7	45.654	415.1	44.001	392.181	41.571	9.8
(% of rural GVA in that LAD in given year)		(5.8%)		(6.3%)		(6.7%)	
(% of total GVA in given LAD in that year)		(0.6%)		(0.7%)		(0.7%)	
CE Broad sectors	Wiltshire GVA 2021 (£m CE)	Wiltshire rural GVA 2021 (est £m)	Wiltshire GVA 2016 (£m CE)	Wiltshire rural GVA 2016 (est £m)	Wiltshire GVA 2013 (£m CE)	Wiltshire rural GVA 2013 (est £m)	% change rural Wiltshire GVA 2013-2021 (est.)
12. Professional, scientific & technical	982.8	647.665	922.018	607.610	827.297	545.189	18.8
(% of rural GVA in that LAD in given year)		(9.4%)		(9.5%)		(9.3%)	
(% of total GVA in given LAD in that year)		(6.0%)		(6.2%)		(6.1%)	

CE Broad sectors	Swindon GVA 2021 (£m CE)	Swindon rural GVA 2021 (est £m)	Swindon GVA 2016 (£m CE)	Swindon rural GVA 2016 (est £m)	Swindon GVA 2013 (£m CE)	Swindon rural GVA 2013 (est £m)	% change rural Swindon GVA 2013-2021 (est.)
13. Business administration & support services	349.535	37.051	323.785	34.321	314.299	33.316	11.2
(% of rural GVA in that LAD in given year)		(4.7%)		(4.9%)		(5.3%)	
(% of total GVA in given LAD in that year)		(0.5%)		(0.5%)		(0.6%)	
CE Broad sectors	Wiltshire GVA 2021 (£m CE)	Wiltshire rural GVA 2021 (est £m)	Wiltshire GVA 2016 (£m CE)	Wiltshire rural GVA 2016 (est £m)	Wiltshire GVA 2013 (£m CE)	Wiltshire rural GVA 2013 (est £m)	% change rural Wiltshire GVA 2013-2021 (est.)
13. Business administration & support services	526.039	346.660	482.792	318.160	412.722	271.984	27.4
(% of rural GVA in that LAD in given year)		(4.8%)		(4.9%)		(4.6%)	
(% of total GVA in given LAD in that year)		(3.2%)		(3.3%)		(3.0%)	

CE Broad sectors	Swindon GVA 2021 (£m CE)	Swindon rural GVA 2021 (est £m)	Swindon GVA 2016 (£m CE)	Swindon rural GVA 2016 (est £m)	Swindon GVA 2013 (£m CE)	Swindon rural GVA 2013 (est £m)	% change rural Swindon GVA 2013-2021 (est.)
14. Public administration & defence	293.212	31.080	281.15	29.802	245.237	25.995	19.6
(% of rural GVA in that LAD in given year)		(4.0%)		(4.2%)		(4.2%)	
(% of total GVA in given LAD in that year)		(0.4%)		(0.4%)		(0.4%)	
CE Broad sectors	Wiltshire GVA 2021 (£m CE)	Wiltshire rural GVA 2021 (est £m)	Wiltshire GVA 2016 (£m CE)	Wiltshire rural GVA 2016 (est £m)	Wiltshire GVA 2013 (£m CE)	Wiltshire rural GVA 2013 (est £m)	% change rural Wiltshire GVA 2013-2021 (est.)
14. Public administration & defence	761.316 (with education & health 18.4%)	501.707	730.39	481.327	749.859	494.157	1.5
(% of rural GVA in that LAD in given year)		(7.0%)		(7.5%)		(8.4%)	
(% of total GVA in given LAD in that year)		(4.6%)		(4.9%)		(5.5%)	

CE Broad sectors	Swindon GVA 2021 (£m CE)	Swindon rural GVA 2021 (est £m)	Swindon GVA 2016 (£m CE)	Swindon rural GVA 2016 (est £m)	Swindon GVA 2013 (£m CE)	Swindon rural GVA 2013 (est £m)	% change rural Swindon GVA 2013-2021 (est.)
15. Education	292.196	30.972	272.192	28.852	268.872	28.500	8.7
(% of rural GVA in that LAD in given year)		(4.0%)		(4.1%)		(4.6%)	
(% of total GVA in given LAD in that year)		(0.4%)		(0.4%)		(0.5%)	
CE Broad sectors	Wiltshire GVA 2021 (£m CE)	Wiltshire rural GVA 2021 (est £m)	Wiltshire GVA 2016 (£m CE)	Wiltshire rural GVA 2016 (est £m)	Wiltshire GVA 2013 (£m CE)	Wiltshire rural GVA 2013 (est £m)	% change rural Wiltshire GVA 2013-2021 (est.)
15. Education	699.77	461.148	649.881	428.271	635.926	419.075	10.0
(% of rural GVA in that LAD in given year)		(6.4%)		(6.7%)		(7.1%)	
(% of total GVA in given LAD in that year)		(4.2%)		(4.4%)		(4.7%)	

CE Broad sectors	Swindon GVA 2021 (£m CE)	Swindon rural GVA 2021 (est £m)	Swindon GVA 2016 (£m CE)	Swindon rural GVA 2016 (est £m)	Swindon GVA 2013 (£m CE)	Swindon rural GVA 2013 (est £m)	% change rural Swindon GVA 2013-2021 (est.)
16. Health	319.4	33.856	281.8	29.871	275.848	29.240	15.8
(% of rural GVA in that LAD in given year)		(4.3%)		(4.3%)		(4.7%)	
(% of total GVA in given LAD in that year)		(0.5%)		(0.5%)		(0.5%)	
CE Broad sectors	Wiltshire GVA 2021 (£m CE)	Wiltshire rural GVA 2021 (est £m)	Wiltshire GVA 2016 (£m CE)	Wiltshire rural GVA 2016 (est £m)	Wiltshire GVA 2013 (£m CE)	Wiltshire rural GVA 2013 (est £m)	% change rural Wiltshire GVA 2013-2021 (est.)
16. Health	745.5	491.284	646.467	426.022	604.095	398.097	23.4
(% of rural GVA in that LAD in given year)		(6.8%)		(6.6%)		(6.8%)	
(% of total GVA in given LAD in that year)		(4.5%)		(4.4%)		(4.5%)	

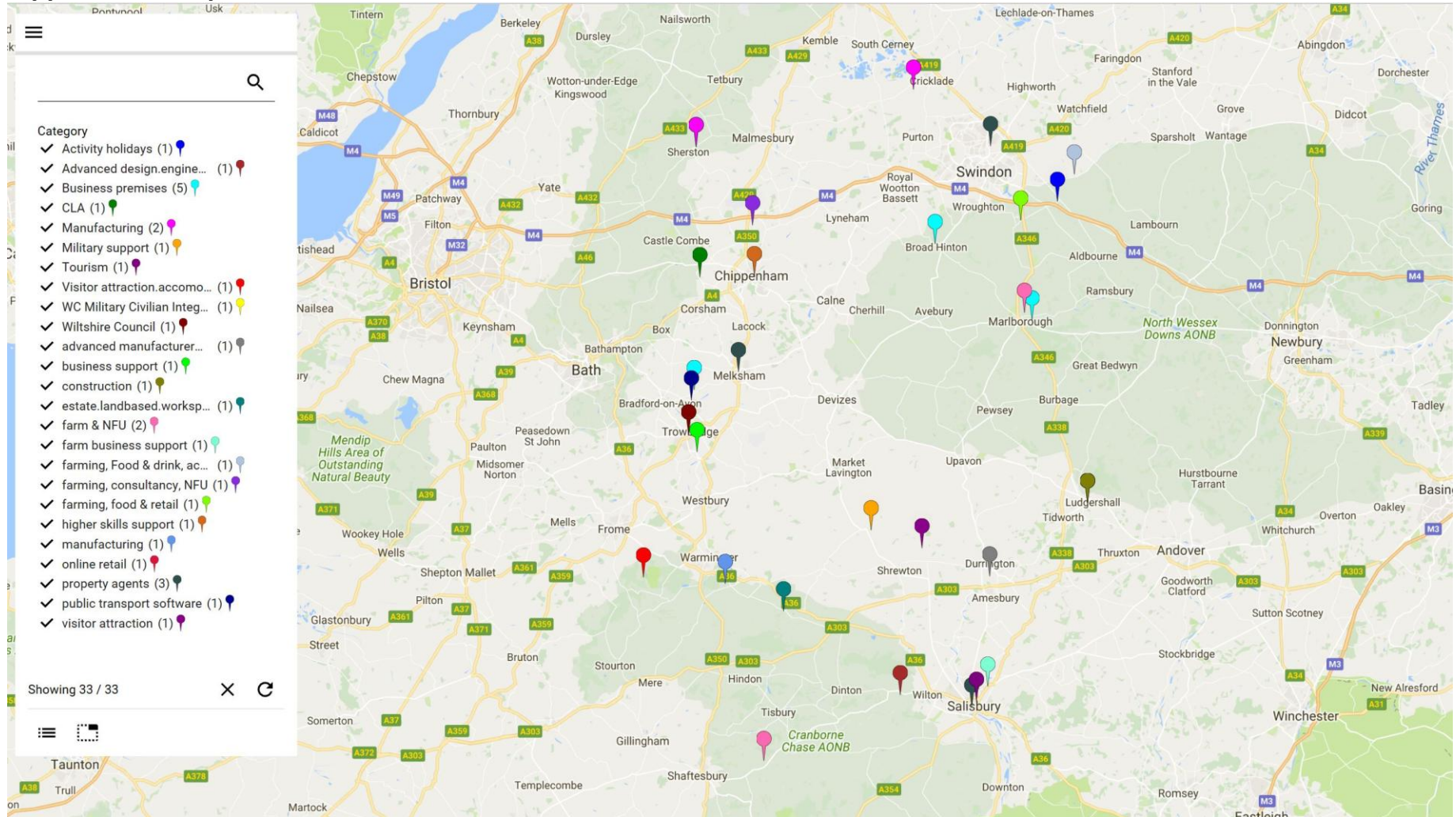
CE Broad sectors	Swindon GVA 2021 (£m CE)	Swindon rural GVA 2021 (est £m)	Swindon GVA 2016 (£m CE)	Swindon rural GVA 2016 (est £m)	Swindon GVA 2013 (£m CE)	Swindon rural GVA 2013 (est £m)	% change rural Swindon GVA 2013-2021 (est.)
17. Arts, Entertainment & other services	227.9	24.157	205.2	21.751	200.159	21.217	13.9
(% of rural GVA in that LAD in given year)		(3.1%)		(3.1%)		(3.4%)	
(% of total GVA in given LAD in that year)		(0.3%)		(0.3%)		(0.4%)	
CE Broad sectors	Wiltshire GVA 2021 (£m CE)	Wiltshire rural GVA 2021 (est £m)	Wiltshire GVA 2016 (£m CE)	Wiltshire rural GVA 2016 (est £m)	Wiltshire GVA 2013 (£m CE)	Wiltshire rural GVA 2013 (est £m)	% change rural Wiltshire GVA 2013-2021 (est.)
17. Arts, Entertainment & other services	493.4	325.151	428.936	282.669	416.703	274.607	18.4
(% of rural GVA in that LAD in given year)		(4.5%)		(4.4%)		(4.7%)	
(% of total GVA in given LAD in that year)		(3.0%)		(2.9%)		(3.1%)	

The estimates of sectoral GVA are based on the Cambridge Econometrics projections for the 2016 Local Economic Assessment using the percentage of rural populations in both Swindon and Wiltshire from the 2011 rural framework to provide the estimates of rural GVA.

GVA across the whole of Swindon & Wiltshire is forecast to increase by 23.4% 2013-21

Rural GVA forecast estimates are that there will be a 22.2% increase in GVA 2013-21
(% of rural GVA in that LAD in given year)

Appendix 5: Map of Interviewee locations & sectors



Appendix 6: Interview Notes **CONFIDENTIAL**

This Appendix to the Swindon and Wiltshire Rural Economy Study 2017 is provided electronically and is confidential; only to be viewed by the Rural Economy Study Steering Group. The reason for this is that the contents are interview notes of interviews undertaken to inform the study and interviewees were given an undertaking that none of their contributions would be attributable. The interviewees names have been replaced by numbers, however, due to the content of the interview notes it is still possible to determine who some interviewees are. In order to preserve anonymity and confidentiality, none of the comments that appear here can be attributed and are only for the eyes of the Rural Economy Study Steering Group.

Appendix 7: Available Property Summary by Postcode

Set out below are tables summarising the available property as a snapshot in time from mid March 2017. It is taken from CoStar data provided by Wiltshire Council, but supplemented with knowledge of additional vacancies in enterprise centres.

Vacant property has been assessed as to whether it is in the rural area within the study and then by the first half of the postcode. Tables are provided for each of retail ,office and industrial property separated according to size of property.

Rural Total Sq Ft	Retail	
	Sq Ft	No of Units
0-500	3,132	10
500-1,000	9,311	13
1,000-5,000	24,350	12
5,000+	7,484	1
Total	44,277	36

SN11 Sq Ft	Retail	
	Sq Ft	No of Units
0-500	786	2
500-1,000	942	1
1,000-5,000	-	-
5,000+	-	-
Total	1,728	3

BA12 Sq Ft	Retail	
	Sq Ft	No of Units
0-500	-	-
500-1,000	2,314	3
1,000-5,000	1,767	1
5,000+	7,484	1
Total	11,565	5

SN12 Sq Ft	Retail	
	Sq Ft	No of Units
0-500	-	-
500-1,000	-	-
1,000-5,000	3,827	2
5,000+	-	-
Total	3,827	2

BA15 Sq Ft	Retail	
	Sq Ft	No of Units
0-500	-	-
500-1,000	2,036	3
1,000-5,000	-	-
5,000+	-	-
Total	2,036	3

SN14 Sq Ft	Retail	
	Sq Ft	No of Units
0-500	-	-
500-1,000	-	-
1,000-5,000	1,560	1
5,000+	-	-
Total	1,560	1

SN4 Sq Ft	Retail	
	Sq Ft	No of Units
0-500	425	1
500-1,000	-	-
1,000-5,000	2,820	1
5,000+	-	-
Total	3,245	2

SN16 Sq Ft	Retail	
	Sq Ft	No of Units
0-500	-	-
500-1,000	-	-
1,000-5,000	3,435	2
5,000+	-	-
Total	3,435	2

SN8 Sq Ft	Retail	
	Sq Ft	No of Units
0-500	-	-
500-1,000	1,091	2
1,000-5,000	-	-
5,000+	-	-
Total	1,091	2

SP2 Sq Ft	Retail	
	Sq Ft	No of Units
0-500	-	-
500-1,000	-	-
1,000-5,000	3,650	1
5,000+	-	-
Total	3,650	1

SN10 Sq Ft	Retail	
	Sq Ft	No of Units
0-500	1,782	6
500-1,000	1,167	2
1,000-5,000	1,350	1
5,000+	-	-
Total	4,299	9

SP4 Sq Ft	Retail	
	Sq Ft	No of Units
0-500	139	1
500-1,000	1,761	2
1,000-5,000	5,941	3
5,000+	-	-
Total	7,841	6

Rural Total Sq Ft	Industrial	
	Sq Ft	No of Units
0-1,000	1,650	2
1,000-5,000	89,615	34
5,000-10,000	51,447	7
10,000-50,000	255,312	11
50,000+	72,098	1
Total	470,122	55

SN11 Sq Ft	Industrial	
	Sq Ft	No of Units
0-1,000	-	-
1,000-5,000	9,757	2
5,000-10,000	-	-
10,000-50,000	80,515	2
50,000+	-	-
Total	90,272	4

BA12 Sq Ft	Industrial	
	Sq Ft	No of Units
0-1,000	-	-
1,000-5,000	12,050	4
5,000-10,000	16,855	2
10,000-50,000	35,672	2
50,000+	-	-
Total	64,577	8

SN12 Sq Ft	Industrial	
	Sq Ft	No of Units
0-1,000	-	-
1,000-5,000	1,794	1
5,000-10,000	6,762	1
10,000-50,000	-	-
50,000+	-	-
Total	8,556	2

BA13 Sq Ft	Industrial	
	Sq Ft	No of Units
0-1,000	-	-
1,000-5,000	1,174	1
5,000-10,000	15,564	2
10,000-50,000	43,858	1
50,000+	-	-
Total	60,596	4

SN14 Sq Ft	Industrial	
	Sq Ft	No of Units
0-1,000	-	-
1,000-5,000	1,313	1
5,000-10,000	-	-
10,000-50,000	10,104	1
50,000+	-	-
Total	11,417	2

BA15 Sq Ft	Industrial	
	Sq Ft	No of Units
0-1,000	-	-
1,000-5,000	-	-
5,000-10,000	-	-
10,000-50,000	-	-
50,000+	-	-
Total	-	-

SN16 Sq Ft	Industrial	
	Sq Ft	No of Units
0-1,000	-	-
1,000-5,000	11,015	3
5,000-10,000	-	-
10,000-50,000	-	-
50,000+	-	-
Total	11,015	3

SN4 Sq Ft	Industrial	
	Sq Ft	No of Units
0-1,000	1,650	2
1,000-5,000	4,048	3
5,000-10,000	-	-
10,000-50,000	34,700	2
50,000+	-	-
Total	40,398	7

SP2 Sq Ft	Industrial	
	Sq Ft	No of Units
0-1,000	-	-
1,000-5,000	1,093	1
5,000-10,000	-	-
10,000-50,000	-	-
50,000+	-	-
Total	1,093	1

SN6 Sq Ft	Industrial	
	Sq Ft	No of Units
0-1,000	-	-
1,000-5,000	6,140	2
5,000-10,000	-	-
10,000-50,000	19,745	1
50,000+	-	-
Total	25,885	3

SP3 Sq Ft	Industrial	
	Sq Ft	No of Units
0-1,000	-	-
1,000-5,000	5,865	2
5,000-10,000	-	-
10,000-50,000	-	-
50,000+	-	-
Total	5,865	2

SN8 Sq Ft	Industrial	
	Sq Ft	No of Units
0-1,000	-	-
1,000-5,000	-	-
5,000-10,000	6,490	1
10,000-50,000	-	-
50,000+	-	-
Total	6,490	1

SP4 Sq Ft	Industrial	
	Sq Ft	No of Units
0-1,000	-	-
1,000-5,000	7,136	2
5,000-10,000	5,776	1
10,000-50,000	30,718	2
50,000+	72,098	1
Total	115,728	6

SN10 Sq Ft	Industrial	
	Sq Ft	No of Units
0-1,000	-	-
1,000-5,000	-	-
5,000-10,000	-	-
10,000-50,000	-	-
50,000+	-	-
Total	-	-

SP5 Sq Ft	Industrial	
	Sq Ft	No of Units
0-1,000	-	-
1,000-5,000	6,762	3
5,000-10,000	-	-
10,000-50,000	-	-
50,000+	-	-
Total	6,762	3

SP11 Sq Ft	Industrial	
	Sq Ft	No of Units
0-1,000	-	-
1,000-5,000	21,468	9
5,000-10,000	-	-
10,000-50,000	-	-
50,000+	-	-
Total	21,468	9

Rural Total Sq Ft	Office	
	Sq Ft	No of Units
0-500	2,426	11
500-1,000	10,430	16
1,000-5,000	47,016	18
5,000+	56,881	8
Total	116,753	53

SN12 Sq Ft	Office	
	Sq Ft	No of Units
0-500	266	1
500-1,000	529	1
1,000-5,000	-	-
5,000+	-	-
Total	795	2

BA12 Sq Ft	Office	
	Sq Ft	No of Units
0-500	-	-
500-1,000	595	1
1,000-5,000	-	-
5,000+	-	-
Total	595	1

SN13 Sq Ft	Office	
	Sq Ft	No of Units
0-500	470	1
500-1,000	-	-
1,000-5,000	-	-
5,000+	-	-
Total	470	1

BA13 Sq Ft	Office	
	Sq Ft	No of Units
0-500	-	-
500-1,000	721	1
1,000-5,000	6,353	2
5,000+	-	-
Total	7,074	3

SN14 Sq Ft	Office	
	Sq Ft	No of Units
0-500	-	-
500-1,000	-	-
1,000-5,000	-	-
5,000+	-	-
Total	-	-

BA15 Sq Ft	Office	
	Sq Ft	No of Units
0-500	-	-
500-1,000	-	-
1,000-5,000	4,575	2
5,000+	5,089	1
Total	9,664	3

SN16 Sq Ft	Office	
	Sq Ft	No of Units
0-500	-	-
500-1,000	-	-
1,000-5,000	1,668	1
5,000+	-	-
Total	1,668	1

SN4 Sq Ft	Office	
	Sq Ft	No of Units
0-500	1,690	9
500-1,000	1,086	2
1,000-5,000	7,295	3
5,000+	21,360	3
Total	31,431	17

SP2 Sq Ft	Office	
	Sq Ft	No of Units
0-500	-	-
500-1,000	-	-
1,000-5,000	-	-
5,000+	-	-
Total	-	-

SN6 Sq Ft	Office	
	Sq Ft	No of Units
0-500	-	-
500-1,000	-	-
1,000-5,000	1,030	1
5,000+	7,035	1
Total	8,065	2

SP3 Sq Ft	Office	
	Sq Ft	No of Units
0-500	-	-
500-1,000	-	-
1,000-5,000	5,717	2
5,000+	-	-
Total	5,717	2

SN8 Sq Ft	Office	
	Sq Ft	No of Units
0-500	-	-
500-1,000	-	-
1,000-5,000	-	-
5,000+	5,314	1
Total	5,314	1

SP4 Sq Ft	Office	
	Sq Ft	No of Units
0-500	-	-
500-1,000	-	-
1,000-5,000	11,108	3
5,000+	18,083	2
Total	29,191	5

SN10 Sq Ft	Office	
	Sq Ft	No of Units
0-500	-	-
500-1,000	511	1
1,000-5,000	3,314	2
5,000+	-	-
Total	3,825	3

SP5 Sq Ft	Office	
	Sq Ft	No of Units
0-500	-	-
500-1,000	-	-
1,000-5,000	-	-
5,000+	-	-
Total	-	-

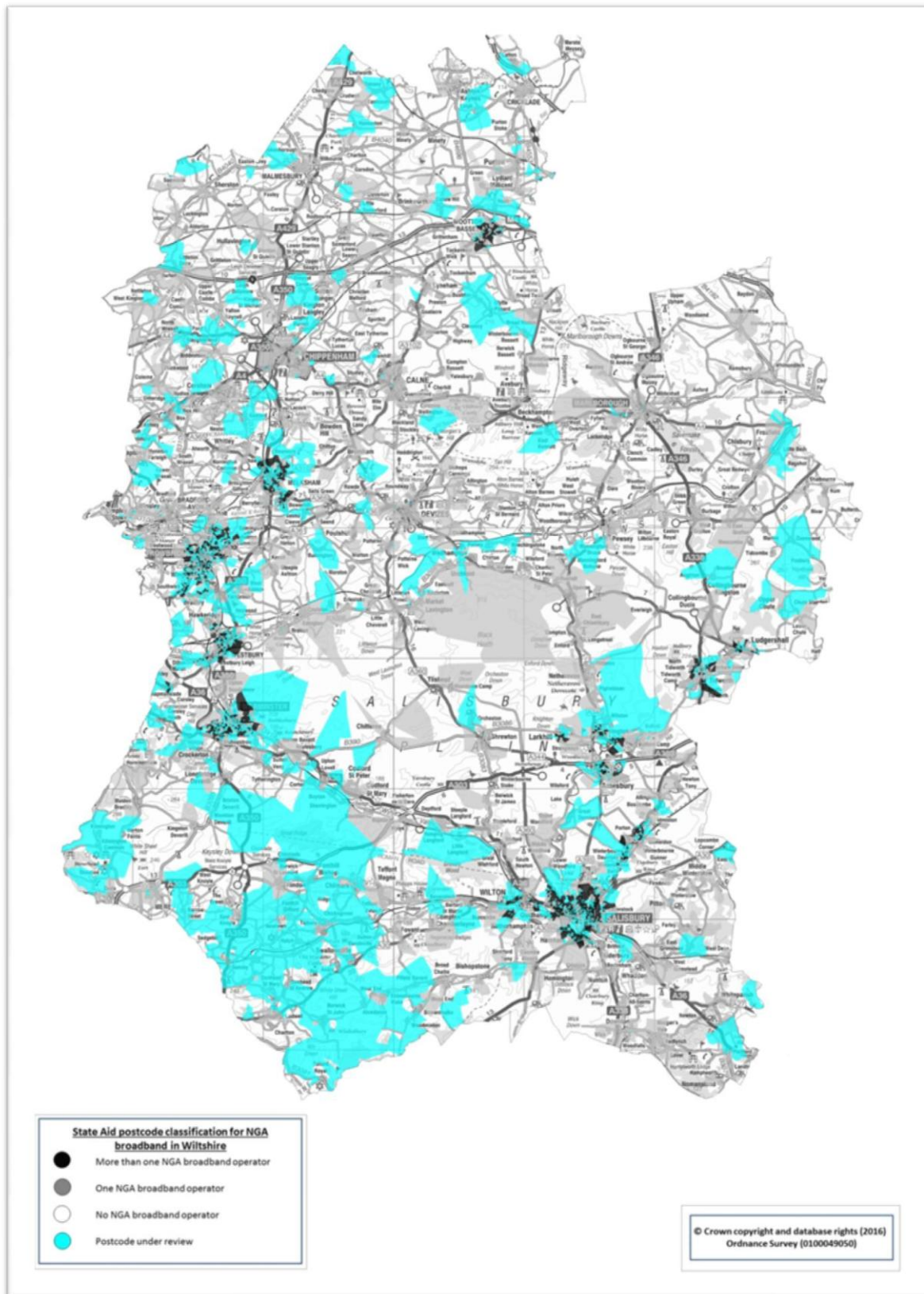
SN11 Sq Ft	Office	
	Sq Ft	No of Units
0-500	-	-
500-1,000	-	-
1,000-5,000	-	-
5,000+	-	-
Total	-	-

SP7 Sq Ft	Office	
	Sq Ft	No of Units
0-500	-	-
500-1,000	755	1
1,000-5,000	-	-
5,000+	-	-
Total	755	1

SP11 Sq Ft	Office	
	Sq Ft	No of Units
0-500	-	-
500-1,000	6,233	9
1,000-5,000	5,956	2
5,000+	-	-
Total	12,189	11

Appendix 8: Wiltshire Broadband Map

Wiltshire NGA Map



Appendix 9: Other Data Analysis

Headline rural socio-economic figures from MSOA Mar-11

Sectoral GVA analysis 2013-21 Swindon & Wiltshire

Sectoral GVA projected change at Local authority and LEP level for all areas and rural areas 2013-21

Trend all VAT and/or PAYE Based Local Units Swindon & Wiltshire 2009-13

Business - Local Units by Broad Industry Group - Urban.Rural W001