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To: Members of the Overview/Scrutiny - Economy Committee (Councillors: Iain Chubb, Trevor Cope, Malcolm Florey, Graham Godbeer, Ben Ingham, John Jeffery, Stuart Luxton, Bob Peachey, Tim Wood, Steve Wragg).

Portfolio Holders
Other Members of the Council for information
Chief Executive
Corporate Directors
Economic Development Manager

Meeting of the Overview/Scrutiny - Economy Committee

Thursday 11 June 2009 – 6.30pm

Council Chamber, Knowle, Sidmouth

Members of the public are welcome to attend this meeting.

- **A period of 15 minutes has been provided to allow members of the public to raise questions.**
- **In addition, after a report has been introduced by the relevant Portfolio Holder and/or officer, the Chairman of the Committee will ask if any member of the public would like to speak in respect of the matter and/or ask questions.**
- **All individual contributions will be limited to a period of 3 minutes – where there is an interest group of objectors or supporters, a spokesperson should be appointed to speak on behalf of group.**
- **The public is advised that the Chairman has the right and discretion to control questions to avoid disruption, repetition and to make best use of the meeting time.**

A hearing loop system will be in operation in the Council Chamber.

Visitors please note that the doors to the civic suite (meeting rooms) will be opened ¼ hour before the start time of the meeting. Councillors are reminded to bring their key fobs if they wish to access the area prior to that time.

AGENDA

1. **Public question time** – standard agenda item (15 minutes)
   Members of the public are invited to put questions to the Committee through the Chairman.
   - Each individual questioner exercising the right to speak during this public question time is restricted to speaking for a total of 3 minutes.
   - Councillors also have the opportunity to ask questions of the Leader and/or Portfolio Holders during this time slot whilst giving priority at this part of the agenda to members of the public.
   - The Chairman has the right and discretion to control question time to avoid disruption, repetition, and to make best use of the meeting time.

2. To receive any apologies for absence.

3. To consider any items, which, in the opinion of the Chairman, should be dealt with as matters of urgency because of special circumstances.

   (Note: such circumstances need to be clearly identified in the minutes; Councillors please notify the Chief Executive in advance of the meeting if you wish to raise a matter under this item. The Chief Executive will then consult with the Chairman).

4. To agree any items to be dealt with after the public (including the press) have been excluded. There are no items that the officers recommend should be dealt with in this way.

5. **Overview/Scrutiny – Economy Committee terms of reference**
   The Committee is timetabled to meet five times each year and its terms of reference include looking specifically at:

   Recession recovery
   Town services
   High Street future
   Skills and training
   School provision for leavers and achievers,
   Further Education provision
   Property based decisions
   Local Government Association issues

6. **Work Programme 2009/10**
   The Committee will be invited to consider and discuss the Committee's work and future work programme.

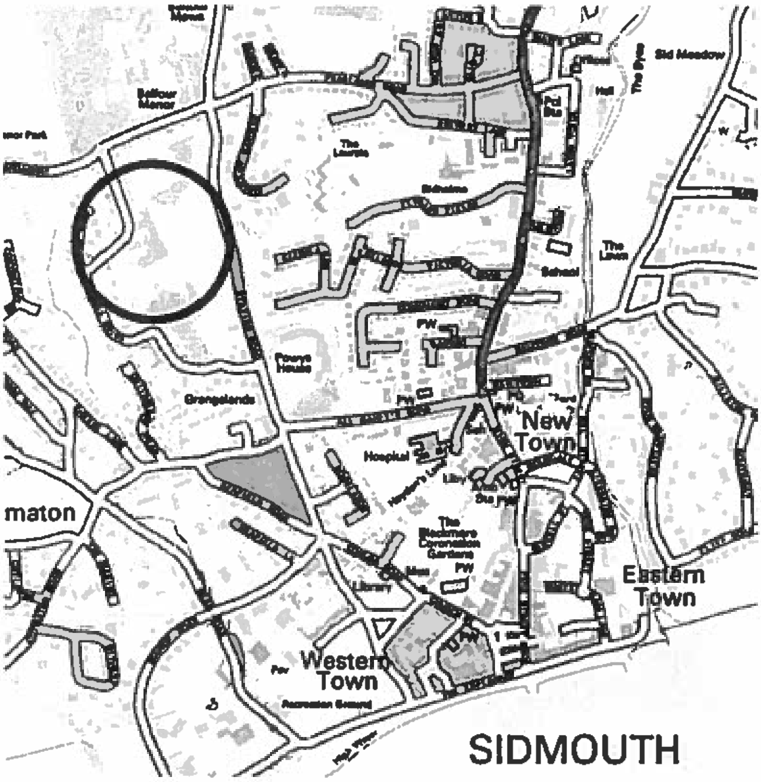
Documents attached for Members' Information:

- **Economy and Development Service Plan 2008/11 (Pages 3-18)**
- **Labour Market Profile East Devon – produced by nomis – official labour market statistics (Pages 19-31)**
- **Economic Trends report (February 2009) – produced by the Economy and Tourism Unit, Exeter City Council (Pages 32-46)**

Members remember!

- You must declare any personal or prejudicial interests in an item whenever it becomes apparent that you have an interest in the business being considered.
- Make sure you say the reason for your interest as this has to be included in the minutes.
- If your interest is prejudicial you must leave the room unless you have obtained a dispensation from the Council's Standards Committee or where Para 12(2) of the Code can be applied. Para 12(2) allows a Member with a prejudicial interest to stay for the purpose of making representations, answering questions or giving evidence relating to the business but only at meetings where the public are also allowed to make representations. If you do remain, you must not exercise decision-making functions or seek to improperly influence the decision; you must leave the meeting room once you have made your representation.
- You also need to declare when you are subject to the party whip before the matter is discussed.

Getting to the Meeting – for the benefit of visitors



The entrance to the Council Offices is located on Station Road, Sidmouth. **Parking** is limited during normal working hours but normally easily available for evening meetings.

The following **bus service** stops outside the Council Offices on Station Road:
From Exmouth, Budleigh, Otterton and Newton Poppleford – 157

The following buses all terminate at the Triangle in Sidmouth, From the Triangle, walk up Station Road until you reach the Council Offices (approximately ½ mile).
From Exeter – 52A, 52B
From Honiton – 340 (Railway Station), 387 (Town Centre)
From Seaton – 52A, 899
From Ottery St Mary – 382, 387

Please check your local timetable for times.

The Committee Suite has a separate entrance to the main building, located at the end of the visitor and Councillor car park. The rooms are at ground level and easily accessible; there is also a toilet for disabled users.

For a copy of this agenda in large print, please contact the Democratic Services Team on 01395 517546

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ECONOMY & DEVELOPMENT
SERVICE PLAN 2008/11

Director	**Portfolio Holder(s)**
Name: Karime Hassan Tel:01395 517535 Email: khassan@eastdevon.gov.uk	Name: Peter Halse 'Portfolio' title: Economy Tel: 01404 43854 Email: peter@halse.co.uk Name: Ray Franklin 'Portfolio' title: Strategic Planning & Regeneration Tel: 01395 445690 Email:rfranklin@members.eastdevon.gov.uk

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Introduction to the Economy and Development Service

The Economy & Development Service is a new service bringing together four areas of Council business directly related to the Council's priority of achieving a thriving economy: Planning Policy, Estate Management, Economic Development and the New Growth Point Delivery Team.

The Council's Vision is to achieve an "Outstanding and sustainable quality of life for everyone in East Devon." The new service will have a significant role to play in delivering this vision. The service is charged with the statutory responsibility to prepare the Council's Local Development Framework that will shape the development of the district over the next twenty years. The LDF will lead the place shaping agenda and will be a major policy instrument in securing housing in general and affordable housing in particular. The principal work of the service will be to support a thriving economy. However, it is important that we recognise that the outstanding environment of the District is a major attraction to business and must be respected if we are to provide an outstanding quality of life for all. The service is responsible for establishing the policy framework that will safeguard the quality of its natural and built environment. With a World Heritage Coast, two thirds of the District covered by AONB status and total of 4,408 listed buildings and 33 conservation areas there will always be a tension between economic growth and environmental concerns. The Economy and Development service will address this tension through the Local Development Framework. The Council recognises we need to make the most of our assets and a high quality and well designed working environment can foster local economic growth by influencing a company's decision to locate and remain in the district, attracting employees and visitors. High quality environments and landscapes can bring economic benefits by attracting tourism related businesses.

Members wish to see full consideration is given to the economic aspects of a planning proposal, alongside social and environmental aspects to ensure that communities and all sectors of our communities have access to jobs and services as well as homes and an attractive environment.

Average wages in the district are below the regional and national average; when compared with regional and national averages a large proportion of jobs in East Devon fall within distribution, hotels and restaurants sectors; tourism, public administration, education and health sectors. 20% of total employment in the District relates to the tourism industry. Therefore there is a high reliance on public sector employment and those sectors that often offer seasonal and/or low paid employment. In addition a comparatively high proportion of the District's population is not economically active.

East Devon's economy functions as part of the Exeter sub-region with high levels of commuting from some of East Devon's settlements (such as Exmouth, Ottery St Mary and Honiton) to the City. Approximately 9.9% of the employees in the Exeter sub-region (over 17,500) work in knowledge based industries compared to 11.7% in the South West. Exeter alone accounts for nearly half of the sub regions stock of knowledge based jobs. East Devon is currently poorly represented in the knowledge based economy.

The council's corporate strategy seeks to address some of these issues by a major programme of economic growth directed at the west end of the District. The Council is working with other partners to bring forward a science park in the District. The University of Exeter has an important role to play in facilitating knowledge transfer to local businesses. The Growth agenda includes a strategic employment site known as Skypark, together with the expansion of Exeter Airport and the establishment of an inter-modal rail freight facility and distribution centre. Through the growth agenda in the west end of the District the Council will be expected to deliver over 11,000 jobs over the next ten years.

A range of strategic and local transport infrastructure initiatives must be addressed to support the economic and social priorities of the Sub-region and District. Some are long standing such as: the expansion of air services to and from Exeter International Airport; the upgrading of the A30/A303 between Ilminster and Honiton; and improving the frequency and reliability of the Exeter to waterloo rail services. A key transport priority is the resolution of the access requirements at Junction 29 of the M5 to serve the planned developments in the west end; it is vital to the economic development strategy of the sub-region that a solution is found to the provision of the access arrangements at this location together with ensuring the west end growth agenda is supported by co-ordinated transport investment and public transport facilities.

The service will also have a key role in the place shaping agenda through the management of the Council's assets; the Council will use its assets within Exmouth and Seaton to support a programme of regeneration within these coastal towns. The Council is committed to supporting the visitor economy in these towns and is working with a number of partners to bring forward interpretation centres for the Jurassic Coast.

PART A: PERFORMANCE IN 2007/08

1. Key achievements in 2007/08

- Exeter & East Devon New Growth Point Steering Board set up in January 2007
- New Growth Point Team established in April 2007
- Department of Communities and Local Government (DCLG) recognised Cranbrook as proto-type eco-town in Eco-Town prospectus and East Devon DC described as "trail blazing"
- Growth Delivery Plan submitted to DCLG with bids for revenue and capital funding to support growth plan.
- Department of Communities and Local Government has awarded Exeter & East Devon NGP £1,252,000 capital/£250,848 revenue for 2008/09 with an indicative allocation at this

stage of £3,626,000 capital/£351,187 revenue for 2009/10 - 2010/11

- Significant progress made in addressing major barrier to delivery in the West End, namely, junction 29 of M5 access improvements.
- Employment land review of District completed
- Negotiations advanced with developers involved with Seaton regeneration land transaction
- Facilitating the provision of independent support and advice to East Devon business, improving and maintaining the business pages of the Council's website.
- Facilitating the provision of visitor infrastructure by supporting the district's seven Tourist Information Centres and the provision of community infrastructure by supporting the operation of public halls.
- Occupancy of office space at the East Devon Business Centre continues to perform impressively, demand for space is greater than supply.
- Continued support to East Devon Business Forum.
- Production of Science Park Draft Supplementary Planning Document (SPD)
- Significant progress on the issue of a gypsy/traveller site allocation through draft DPD

2. Customer satisfaction in 2007/08

1. Customer satisfaction survey of tenants and casual users of the East Devon Business Centre
   Customer satisfaction surveys are regularly undertaken at the conclusion of casual hire bookings of facilities at the East Devon Business Centre. The results suggest high levels of customer satisfaction and are used to inform adjustments to the Centre's approach to service delivery.

   Similar feed back is obtained from users of the Centre's office accommodation. Licencees are regularly invited to comment on the quality and value of the Centre's facilities. Customer satisfaction levels continue to perform impressively.

2. LDF Statement of Community Involvement Pre Consultation Draft – Initial Consultation Questionnaire.

3. Benchmarking in 2007/08

Benchmarking activities in 2007/08	Findings, key lessons learnt and outcomes
Worked with regional colleagues, such as Bristol, Poole, Swindon, Taunton, Plymouth, Cheltenham, Gloucester, and Torbay through Key Areas Group to address the sustainable communities agenda.	The issues of a Tariff approach to infrastructure funding; capacity requirements for delivery of growth agenda; the appropriateness of different models for delivery, this work directly influenced decision on the model of the New Growth Point Steering Board. This work helped compile growth delivery plan.

4. Performance review for 2007/08

"East Devon District Council is trail blazing", so said Richard McCarthy, Director General of Programmes, Policy and Innovation at the Department for Communities and Local Government, at a Growth Summit launching the Government's Green Paper on Housing. This praise reflects the work of the service in bringing forward the growth agenda in the west end of the District. The establishment of the New Growth Point Steering Board and the setting up of the delivery team with funding and support from SWRDA has been seen as good practice within the region and other authorities have visited the service to learn from the work of the Council. The delivery team will constitute a key delivery arm for the Council in achieving the Council's objectives for the economy of the District. Funding has been secured from the DCLG to support the work of the team with potentially £5.4million of capital and revenue funding secured for the next three years. This year has been a year of laying down the foundation for the Council to deliver in subsequent years, consolidating our partnerships with other key stake holders and raising the Council's profile both in the region and nationally. A key outcome from the delivery team was the production of a Growth Delivery Plan this will guide the future performance of the team and constitutes their work programme.

The regeneration programmes for Exmouth and Seaton have moved forward steadily with significant progress being made in Seaton. Work has advanced on negotiations over the Council's land holdings and this has clarified matters that will constitute the regeneration programme for the town; in particular two project officers have been appointed to work on the expansion of the Seaton Marshes and delivery of the Gateway Visitor Centre. The ingredients of the regeneration programme are closely intertwined with the fate of any planning application for the regeneration area. Key planks of the programme could only be delivered with funding that would flow from a grant of permission, whether through a capital receipt or through a section 106 agreement. The announcement to the end of 2007 that Liatris Holdings Limited had sold their land interest to Tesco caused a temporary pause in the work on the regeneration package but work on the Council's land interest continues. One would expect a resubmission of the planning application early 2008.

A significant area of concern from members has been the interface with business and development control. A number of steps have been taken to ensure the Economy Portfolio Holder is better informed in the consultation exercise on planning applications. A monthly meeting takes place between the Development Control manager, the Economy Portfolio Holder, the Corporate Director and the Economic Development Officer to discuss planning applications; and the Economy Portfolio Holder now meets with applicants from business prior to these meetings. This is part of a concerted initiative for the service to be more proactive in its dialogue with business.

Work on the local development framework has advanced with background evidence being compiled prior to the core strategy issues and options paper being produced in early 2008. An important document produced was the assessment of employment land supply, this document was robustly examined by members and the East Devon Business Forum before being agreed. A key achievement was the production of the University of Exeter Science Park supplementary planning document.

The estates management function has continued to perform its facilitating role for other council services, supporting the provision of Council land for affordable housing opportunities and furthering Councils objectives on regeneration. The Estates management function in particular struggled with the absence of the Head of Service over the last 12 months but continued to perform with the support of the District Valuers Office and other private sector expertise as and when required for the larger commercial deals.

PART B: PERFORMANCE INDICATORS

5. National and local performance indicators

National Performance Indicators						
	Quartile Target 2006/07	Quartile Achieved 2006/07	Quartile Target 2007/08	Quartile Target 2008/09	Quartile Target 2009/10	Quartile Target 2010/11
	•	•	•	•	•	•
106 New homes built on previously developed land	70%	68%	70%	60%	50%	•
200a Has the council submitted the local development scheme by 31 march 05.	•	Yes	•	•	•	•
200b Has the council met local development scheme milestones	No *	•	•	•	•	•
200c Did the planning authority publish an annual monitoring report by 31 December 05	•	•	•	•	•	•
219aTotal number of conservation areas in the local authority area	•	Deleted 07/08	•	•	•	•
219b% of conservation areas with an up to date character appraisal	36%	• 3%	• 505	100%	100%	100%
There has been some slippage from the milestones in the March 2007 Local Development Scheme in part linked to slippage in the Regional Spatial Strategy timetable	•	•	•	•	•	•
• Local Performance Indicators						
The Delivery Team will be expected to perform according to the New Growth Point Growth Delivery Plan approved by the Steering Board in October 2007.						

PART C: PLANS FOR 2008/11

The Economy and Development service operates within an economic development framework established by SWRDA in the Regional Economic Strategy and the Exeter and the Heart of Devon Economic Development Strategy EHOD (This strategy is currently being reviewed). The three regional strategic objectives are:

- To raise productivity
- To increase economic inclusion and
- To improve regional communications and partnership.

The EHOD strategy prioritises actions to meet the regional economic strategy objectives, for example to meet the objective of raising productivity, the strategy identifies: Promoting investment in key competitive economic sectors and provision of knowledge based jobs; equipping the labour force with the appropriate skills; and identifying and releasing employment land and premises opportunities.

The key actions flowing from the EHOD strategy include:

- Promoting the science park
- Ensuring the LDF reflect the vision and goals of the economic development strategy
- Reviewing the supply of employment land
- Encouraging agricultural diversification and re-use of buildings for rural enterprise
- Implement a rural business development and support programme
- Develop a skill/workforce development plan
- Promote high profile land mark developments
- Demonstrate importance of natural environment
- Conserve and enhance the environment
- Promote tourism
- Promote the icon status of the WHC site brand
- On going lobbying for transport infrastructure
- Increase provision of affordable housing

These objectives and actions should inform the key issues and actions for the next three years.

6. Key Issues to be faced and/or options for change in the next 3 years

Key Issues	Start Date	End Date	Lead Officer
Produce local development framework (LDF) key documents, including: Core Strategy, Joint Area Action Plan with Exeter, and Statement of Community involvement. Time table is set out in the Local Development Scheme and is subject to annual monitoring report	Jan 2008	Dec 2010	J.Maidment
Policy tensions – rural development with aim to conserve and enhance AONB	Jan 2008	Dec 2010	JM
Implications of Panels report on Regional Spatial Strategy in terms of increased numbers of housing for the District and supply of affordable housing: expansion of Cranbrook to 7,500 dwellings and second new town of 6,000 dwellings. Could have significant implications for consultation and options testing for core strategy.	Jan 2008	Dec 2010	JM
Achieve implementation of development in line with New Growth Point Growth Delivery Plan (significant challenge to deliver jobs at Skypark in line with delivery plan)	2008	2011	F.Morey
Building capacity of delivery team to handle delivery programme	2008	2009	FM
Uncertainty caused by unitary question, potential impact on new growth point and delivery programme and governance arrangements for Steering Board	2008	2009	K.Hassan
Role of Teignbridge and working relationships with other local authorities in the production of the Joint Area Action Plan still far from clear.	2008	Dec 2008	KH
Major programme of asset disposal will require continued support of special commercial property advice. Currently the Council has used the District Valuers Office to advice on the issue of best value. Continued support of independent advice is deemed to be essential	On going		
Establishing effective Asset management and role and function of the AM forum. Greater pressure on the Council to use its land assets	2008	2011	K.Hassan

to release economic growth but also to ensure that longer terms those assets continue to benefit the Council Need to evaluate reinvestment of capital receipts to provide future returns			
The Council will need to evaluate the continued use of the Knowle as the Council's head quarters. As part of strategic asset management and the council's carbon footprint the Council should investigate options for the delivery of its services, including relocating the Council's offices	Jan 2008	May 2008	KH
Delivering regeneration programme for Seaton: Potential land acquisition to provide employment site and sports pitch Lottery bid and land acquisition required for expanded wetland reserve Partnership/governance arrangements for the programme need to be addressed.	2008	2011	K.Hassan
Delivering regeneration programme for Exmouth: Key sites will require alternative sites to be provided to release land, this will have to be addressed as part of the LDF Closure of Rolle College will have economic impact on town Support for 16-19 year education provision at Rolle College will require significant support from other parties, i.e., Devon County Council and Plymouth University. Partnership/governance arrangements for the regeneration programme need to be addressed	2008	2011	K.Hassan
Balanced communities will require work on learning and skills agenda, type of new jobs created, number and distribution of new employment opportunities provided. Population trends suggest population growth of 28,000 in East Devon over next twenty years, 20,000 will be over retirement age. We will need to engage the Learning and Skills Council and SWRDA in developing a learning and skills programme for the district that builds on the major infrastructure investment being made in the west end. We need to capture funding and support from partners.	2008	2011	KH
World Heritage Coast brand, how do we maximise its economic benefit for East Devon, indeed how do we ensure that Devon gets a fair share of the WHC site benefits	2008	2011	KH
Climate change agenda will have significant implications for the East Devon economy, the West End offers real opportunities for lasting impacts in reducing carbon and providing renewal energy solutions. The service will have a significant role to play in driving the Councils carbon reduction strategy.	2008	2011	FM
We will need to complete building the technical evidence base for the LDF	On going	May 2008	JM
We will need to build data base for managing economic development inquiries	Jan 2008	May 2008	N.Harrison/ Fliss Morey
The level of intervention that the Council can reasonably commit to is very limited, the key focus of attention over the next 12 months will be in the			

interface with planning and getting sites delivered and available for the private sector. Any change in this role would have financial consequences not currently budgeted for.			

7. Contributions to key corporate outcomes planned for 2008/11

Outcomes	Start Date	End Date	Lead Officer
The main outcomes the service will achieve in 2008/11 as part of its contribution to combating **Climate Change** are:			
1. Consultants have been employed to produce Low and zero carbon strategy for the west end growth area	Jan 2008	2011	FM
2. Funding of initiatives through NGP funding for innovative solutions to delivering low/zero carbon solutions			FM
3. All commercial development at Skypark and Cranbrook to be constructed as a minimum of Breeam very good			FM
4. NGP funding to be used to bring in expertise to assist with delivery of strategy.			FM
5. LDF to set more demanding targets on sustainable construction and renewable energy			JM
6. To produce a climate change strategy for the Council			KH
7. To evaluate the feasibility of relocating the Council offices to secure a significant reduction in the Council's carbon foot print			KH
8. To establish the science park as a zero carbon development			KH
9. To use NGP funding to provide the multi purpose building at Cranbrook as a Breeam excellent building			FM
10. To push for Breeam excellent rating on all developments pursued through the regeneration programmes for Exmouth and seaton.			KH
The main outcomes the service will achieve in 2008/11 as part of its contribution to our **Customer Service Strategy** are:			
1. A greater focus on helping business manage their way through the planning system	On going	2011	NH
2. Building an business inquiries data base within the NGP delivery team	Jan 2008	May 2008	FM
3. Building a statistical and research capacity within the NGP delivery team	Jan 2008	May 2008	FM
4. Providing businesses with the opportunity of shaping the LDF so that the policy framework is business focused, and employment and housing land supply assessments are robustly assembled.	On going	2010	JM
5. Support the communities with their visioning exercises	On going	End 2008	JM

The main outcomes the service will achieve in 2008/11 as part of its contribution to our **Data Quality Policy** are: Equality Impact Assessment – a risk rating of all relevant policies will be completed by beginning of March 2008 and an EIA completed for all high risk policies, processes, practices and procedures by end December 2008.			
The main outcomes the service will achieve in 2008/11 as part of its contribution to our **Equality and Diversity Policy** are: All the policies that will comprise the LDF will be tested against the Council's equality and diversity policy To review all data monitoring systems and implement improvements to accord with government guidance and sound practice.	Jan 2008	2011	JM
The main outcomes the service will achieve in 2008/11 as part of its contribution to our **Homeworking Policy** are: The service will examine the scope to achieve greater home working, but the limited size of the staff complement will test the ability of the service to achieve a higher figure.			

8. Key service outcomes planned for 2008/11

Key outcomes		Start Date	End Date	Lead Officer	Link to Corporate Strategy Priorities and/or key Strategies for this Service
Planning Policy/LDF					
Radically review the Supplementary Planning Guidance and other policies relating to affordable housing to help us deliver higher numbers of affordable housing.	Delivery of at least 200 affordable homes each year across the District from 2008 to 2011 with an aspiration to deliver up to 300 a year from 2011 to 2015	Jan 2008	Dec 2010	JM	Affordable housing priority
Make sure the Local Development Framework helps us substantially increase provision of affordable homes.	Achieve a target of 40% affordable homes	Jan 2008	Dec 2010	JM	Affordable housing priority
Use the consultation process outlined in the Local Development Framework to consult and engage residents in the benefits of further development and regeneration.	Planning applications which meet community aspirations and plans	Jan 2008	Dec 2009	JM	Affordable housing priority
Work with Parish councils to identify sites that can be used for building affordable homes.	Complete at least one rural based housing scheme each year	On going		JM	Affordable housing priority
Economic Growth in the West of the District					
Delivery of employment growth in accordance with Growth Delivery Plan.	by 2011: 240 jobs at the new town; 1,000 jobs at Skypark; 300 jobs at the science park; 150 jobs at the IMFF [11,000 jobs by 2019]	On going		FM	Thriving economy
Resolution of the way forward for delivering the Phase 2 access solution to the M5 junction 29/A30 improvements.	Regional Fund allocation of £12 million secured; Regional Infrastructure Funding committed by the South West Regional Development Agency; Major Scheme bid approved for access and design. Section 274 Agreement signed by Devon County Council	2008	2011	KH	Thriving economy
Support development of a strategically important business park (Sky Park) providing business accommodation and knowledge based jobs.	The first building is built on site by 2011	On going		FM	Thriving economy

Delivery of first phase of science park: Prepare master plan, Set up science park company, Achieve outline planning permission for science park and detailed approval for first phase	First building of 30,000 sq ft	On going	2011	FM	Thriving economy
Facilitate delivery of a new railway station at Cranbrook with public transport provision to all major development sites.	Cranbrook has a railway station by 2009	On going	2009	FM	Thriving economy
Ensure the provision of sustainable forms of transport, walking, cycling and buses.	Transport Strategy for the new employment sites in the West of the District is delivered	On going		FM	Thriving economy
Develop a Local Area Agreement with Devon County Council and the South West Regional Development Agency for delivery of employment sites.	Provision of employment elsewhere in the district through delivery of identified employment sites outside the west end of the district	2008		KH	Thriving economy
Seaton Regeneration					
Lead the Seaton regeneration programme	Housing, retail, new employment site, 200 jobs by 2011, visitor facilities, enhanced youth facilities, expanded wetland nature reserve	On going		KH	Thriving economy
Support the acquisition of land to provide the expanded Wetland Nature Reserve project.	Expanded wetlands reserve	On going		NH	Thriving economy
Transform the visitor economy of Seaton to generate at least 200,000 additional visits a year	Deliver Gateway visitor centre and expanded wetlands reserve and Sustrans cycle hub funded and in place by 2011	On going	2011	KH	Thriving economy
Provide 400 new homes in Seaton	New homes delivered by 2013	On going			Affordable housing and thriving economy
Support Seaton youth projects such as an improved youth facility and sports fields with changing rooms at Hareparth Road	Improved youth facilities by 2009	On going	2011	NH	Thriving economy and children and young people
Support the Jurassic Coast Visitor Centre projects at Seaton.	Delivered and open by 2011	On going	2011	KH	Thriving economy
Support lottery funding bid for the development of the expanded Wetland Nature Reserve project.		On going		NH	Thriving economy

Bring forward employment site at Harepath Road by entering into joint venture agreement with developer	Agree terms of joint venture agreement Prepare master plan and Outline planning permission secured by 2010	On going	2011	NH	Thriving economy
Exmouth regeneration					
Lead the regeneration programme for Exmouth and work with our partners at Devon County Council and Exmouth Town Council to successfully secure public and private sector investment in Exmouth	Bring forward the implementation of key development sites identified in the Local Plan; securing investment in the town centre and sea front through management of the Council's assets.	On going	2011	KH	Thriving economy
Work with developers to enable them to bring forward the redevelopment of the Bus station site for the purpose of a supermarket, integrated public transport facility, new sport centre and swimming pool, and new library.	Creation of 2-300 new jobs to help reduce the 23% of people travelling from Exmouth to Exeter for work, Improved shopping offer for the town centre and new amenities	On going	2011	KH	Thriving economy
Work with Exmouth Town Council to secure major private sector investment to improve the variety of shops in Exmouth Town Centre to target markets not currently catered for and provide a major convenience store.	A rich variety of shopping provision reflecting the best performing towns in the country	On going	2011	NH	Thriving economy
Support the Jurassic Coast Visitor Centre projects at Exmouth	Delivery of centre by 2011	On going	2011	NH	Thriving economy
Address the car parking provision shortfall in Exmouth Town Centre.	80 more car park spaces in the short term	2010	2011	JM	Thriving economy
Support schemes promoted by DCC and Exmouth Town Council for the enhancement of the town centre	Work with DCC on the feasibility studies and design for a major enhancement scheme for the Strand area of the town centre	2008	2011	KH	Thriving economy
Economic Growth Generally					
Develop a Local Area Agreement with Devon County Council and the South West Regional Development Agency for delivery of employment sites.	Provision of employment elsewhere in the district through delivery of identified employment sites outside the west end of the district	2008		KH	Thriving economy
Use opportunities provided by the Local Authority Business Growth Incentive Scheme to	Encourage the growth of private sector enterprise within the district either	On going	2011	NH	Thriving economy

reinvest in economic development initiatives in consultation with East Devon Business Forum.	directly or through in direct funding of public sector intervention to encourage business				
Review current local plan policy for Areas of Outstanding Natural Beauty and rural areas in the preparation of the new Local Development Framework.	Address responses from business to restrictions of planning system	2008	2011	JM	Thriving economy
Work with businesses to implement the Better Regulation Framework and ensure a fair and consistent approach to regulation.	Better customer satisfaction and encouragement of business growth	On going		NH	Thriving economy
Develop the learning and skills agenda with the support of SWRDA and the LSC	To assist access to better skilled jobs and better paying jobs	2008	2011	KH	Thriving economy, Young People
Continued support to the Honiton Street Market	A vital and vibrant town centre	On going		NH	Thriving economy
Continued support to the East Devon Business Centre at Honiton	Full occupation of the business centre to support business growth	On going		NH	Thriving economy
Involvement of young people in the planning process addressed through the statement of community involvement	Ensure the future needs of young people are addressed in the local development framework and future decisions on housing allocations address the social and community infrastructural needs of the young			JM	Children and Young people

09.Consultation planned for 2008/11

Consultation activity	Start Date	End Date	Lead Officer
• Customer satisfaction survey of tenants and casual users of the East Devon Business Centre			NH
• Customer satisfaction survey of traders at Honiton Street Market			NH
• Customer satisfaction survey of Leisure East Devon managers.			NH
• Meetings of the East Devon Business Forum			NH
• Survey of East Devon businesses conducted through Devon Renaissance			NH
• Liaison with Council Industrial Unit tenants and other facility users.			NH
• Major public consultation exercises as per the Council's Local Development Scheme and Statement of Community Involvement in respect of the LDF	On going	On going	JM

10. Value for Money – opportunities to benchmark and make efficiencies in 2008/11

Benchmarking opportunities in 2008/11			
	Start Date	End Date	Lead Officer
The Council has worked with government agencies to bring resources into the district in order to deliver the Councils economic growth agenda, as part of this work the Council continues to play a significant part within the region in sharing	On going	On going	KH

learning on the sustainable communities agenda; it does this through the Key Areas Group chaired by SWRDA.			
Improving the Council's performance over strategic asset management is a key issue for the service and estates officers will be seeking out opportunities for bench marking during the next 12 months.	Jan 2008	Dec 2008	Donna Best & Rob Speers

Opportunities to make efficiencies in 2008/11			
	Start Date	End Date	Lead Officer
There are limited opportunities to make efficiencies in 2008/11.The Council is embarking on a major programme of economic growth that challenges the Council's capacity to deliver. It requires funding and support from regional and national government to deliver this programme and has secured funding of £200,000 pa from SWRDA to the delivery team, and £250,848 of revenue funding and £1,252,000 of capital funding for 2008/09.The LDF will have significant implications for the service in terms of staff capacity and funding will be required to delivery technical studies.			
In association with the climate change agenda investigating efficiencies in council services to reduce carbon footprint of EDDC including investing to save (e.g. change of vehicles/fuel & methods of working & developing more energy efficient offices to save running cost of buildings/council vehicles) possible eventual relocation of offices as efficiency saving in terms of running costs.	2008	2011	NH
Investigating most efficient use of council owned land and property e.g. developing existing assets to support housing/economic development agenda etc.	2008	2011	NH

11. Joint working – opportunities to share services and work in partnership in 2008/11

Opportunities to share services in 2008/11			
	Start Date	End Date	Lead Officer
The New Growth point delivery team represents a formal shared service arrangement with respect of economic development and implementation work for the west end of the district in partnership with Exeter City, Devon County Council and SWRDA.	2008	2011	FM

Partnering opportunities in 2008/11			
	Start Date	End Date	Lead Officer
The New Growth point Delivery Team is a formal partnership with Devon County Council, Exeter City Council and SWRDA this will continue to be the principal partnership taking forward a key plank of the services work programme. This team is funded by SWRDA and has secured funding from DCLG to build further capacity to deliver the planned growth in the west end. The DCLG Delivery Team have been offered assistance from CABE and BRE for growth area projects and climate change agenda and we are keen to take up the offer.	2008	2011	FM

12. Training and workforce planning in 2008/11

(NB. Headcount figures and any other staff data quoted must be reported as full-time equivalent (FTE).)	
Current Headcount?	15.5(FTE)
Likely changes to headcount in the next three years including planned retirements?	Head of Property and Economic Development post deleted in November 2007. Approval given for recruiting graduate estates surveyor post and replacement of one senior estates surveyor post to principal estates surveyor post. These changes were approved on the basis of this being an interim review of the new service. A more formal review will take place at the end of 2009.The Delivery Team will be seeking to add capacity to the team through the funding provided by DCLG. This will be reported through the New Growth Point Steering Board and will not have financial implications for the District Council. Policy and Conservation Manager retires 2010.
Please comment on any recruitment, retention or significant absence issues which might affect the delivery of the Service Plan objectives.	The ability of the service to deliver the ambitious growth agenda is heavily dependent on the Delivery Team securing additional capacity to perform and to provide support to the Economy and Development service. The planned expansion of delivery team will seek possible secondment of EDDC staff with relevant expertise and backfilling of posts. Management training of senior post and additional project management training of planning assistants. Filling of posts on short term temporary contract basis may prove challenging.

13. Budget needed to implement the service plan

	2008/09	2009/10	2010/11
Total Budget requirement			
The service plan can be delivered through the draft budget			
Additional spending/Transfer of resources	**2008/09**	**2009/10**	**2010/11**
Special items have been included as bids under the LABGI Funding as follows:			
• Funding for specialist strategic Estates Advice	£20,000		
• Provision for initial work into reducing the Council's carbon footprint (The Council has applied to the Carbon Trust for assistance as part of their carbon management programme)	£20,000		
• Wetlands project at Seaton match funding required with Environment Agency to fund Wetlands Project Co-ordinator to put together lottery bid and to assist with land acquisition and project development	£10,000		
• Exmouth and Seaton Gateway Visitor Centres (contribution of match funding to fund the project officer . Contribution of £15,000 made in 2006/07. Post also funded by DCC and Exmouth and Seaton town councils)	£15,000		

Regeneration programmes: Exmouth members have given a clear steer to The Economy Portfolio Holder that they see the enhancement of the Strand as a priority together with the redevelopment of the Bus Station and London Inn. No funding is identified in the budget for this work. The County Council is willing to bring forward a major enhancement scheme and would be looking for match funding. Design work in 2008/09 would be around £200,000, with potentially up to £5million required for 2009/10 onwards. £100,000 would be required from LABGI to fund this work.	£100,000 would be required from LABGI		

nomis - official labour market statistics

Labour Market Profile
East Devon

The profile brings together data from several sources. Details about these and related terminology are given in the definitions section.

RESIDENT POPULATION

Total population (2007)

	East Devon (numbers)	Devon (numbers)	Great Britain (numbers)
All people	132,300	750,100	59,216,200
Males	63,200	365,400	29,054,100
Females	69,100	384,800	30,162,100

Source: ONS mid-year population estimates

Working age population (2007)

	East Devon (numbers)	East Devon (%)	Devon (%)	Great Britain (%)
All people - working age	70,500	53.3	58.5	62.2
Males - working age	37,400	59.2	63.5	66.2
Females - working age	33,100	47.9	53.7	58.3

Source: ONS mid-year population estimates

Notes: % is a proportion of total population
Working age includes males aged 16-64 and females aged 16-59

LABOUR SUPPLY

Employment and unemployment (Oct 2007-Sep 2008)

	East Devon (numbers)	East Devon (%)	Devon (%)	Great Britain (%)
All people				
Economically active†	65,400	86.5	82.1	78.8
In employment†	63,800	84.2	79.1	74.5
Employees†	53,300	71.6	66.2	64.8
Self employed†	9,400	11.5	12.1	9.3
Unemployed (model-based)§	1,900	2.9	3.4	5.3
Males				
Economically active†	34,900	91.8	84.4	83.3
In employment†	33,900	89.1	80.5	78.6
Employees†	27,300	74.3	63.7	65.1
Self employed†	5,800	12.7	15.8	13.1
Unemployed§	#	#	4.5	5.6
Females				
Economically active†	30,500	80.6	79.5	73.9
In employment†	29,900	78.7	77.6	70.1
Employees†	26,000	68.5	69.1	64.4
Self employed†	3,600	10.2	8.0	5.2
Unemployed§	!	!	2.2	5.0

Source: ONS annual population survey

- \# Sample size too small for reliable estimate
- ! Estimate is not available since sample size is disclosive
- † numbers are for those aged 16 and over, % are for those of working age (16-59/64)
- § numbers and % are for those aged 16 and over. % is a proportion of economically active

Economic inactivity (Oct 2007-Sep 2008)

	East Devon (numbers)	East Devon (%)	Devon (%)	Great Britain (%)
All people				
Economically inactive	9,400	13.5	17.9	21.2
Wanting a job	#	#	4.5	5.6
Not wanting a job	7,400	10.6	13.4	15.6
Males				
Economically inactive	#	#	15.6	16.7

Wanting a job	!	!	4.0	4.6
Not wanting a job	#	#	11.6	12.0
Females				
Economically inactive	6,400	19.4	20.5	26.1
Wanting a job	#	#	5.2	6.6
Not wanting a job	4,400	13.3	15.4	19.4

Source: ONS annual population survey

Sample size too small for reliable estimate
! Estimate is not available since sample size is disclosive
Notes: Numbers and % are for those of working age
% is a proportion of total working age population

Employment by occupation (Oct 2007-Sep 2008)

	East Devon (numbers)	East Devon (%)	Devon (%)	Great Britain (%)
Soc 2000 major group 1-3	22,500	35.3	41.0	43.2
1 Managers and senior officials	7,800	12.2	15.4	15.5
2 Professional occupations	6,400	10.1	11.7	13.0
3 Associate professional & technical	8,300	13.1	13.8	14.6
Soc 2000 major group 4-5	13,900	21.8	22.7	22.4
4 Administrative & secretarial	5,500	8.6	10.2	11.4
5 Skilled trades occupations	8,400	13.2	12.5	10.9
Soc 2000 major group 6-7	13,500	21.2	17.2	15.7
6 Personal service occupations	6,900	10.8	8.8	8.1
7 Sales and customer service occs	6,600	10.4	8.3	7.5
Soc 2000 major group 8-9	13,800	21.6	19.1	18.7
8 Process plant & machine operatives	4,500	7.1	6.0	7.1
9 Elementary occupations	9,300	14.5	13.1	11.5

Source: ONS annual population survey

Notes: Numbers and % are for those of 16+
% is a proportion of all persons in employment

Qualifications (Jan 2007-Dec 2007)

	East Devon (numbers)	East Devon (%)	Devon (%)	Great Britain (%)
NVQ4 and above	20,100	29.1	29.1	28.6
NVQ3 and above	34,500	49.8	51.5	46.4
NVQ2 and above	48,900	70.6	70.1	64.5
NVQ1 and above	59,100	85.4	83.0	78.1
Other qualifications	4,000	5.7	8.0	8.8
No qualifications	6,200	8.9	9.0	13.1

Source: ONS annual population survey

Notes: For an explanation of the qualification levels see the definitions section.
Numbers and % are for those of working age
% is a proportion of total working age population

Earnings by residence (2008)

	East Devon (pounds)	Devon (pounds)	Great Britain (pounds)
Gross weekly pay			
Full-time workers	426.7	416.3	479.3
Male full-time workers	479.2	469.5	525.0
Female full-time workers	365.7	345.0	412.7
Hourly pay			
Full-time workers	10.51	9.99	12.01
Male full-time workers	11.59	10.68	12.72
Female full-time workers	9.33	9.01	10.96

Source: ONS annual survey of hours and earnings - resident analysis

Note: Median earnings in pounds for employees living in the area.

WORKING-AGE BENEFITS

The Jobseeker's Allowance (JSA) is payable to people under pensionable age who are available for, and actively seeking, work of at least 40 hours a week.

Total JSA claimants (April 2009)

	East Devon (numbers)	East Devon (%)	Devon (%)	Great Britain (%)
All people	1,544	2.2	2.6	4.1
Males	1,141	3.1	3.6	5.8
Females	403	1.2	1.5	2.2

Source: ONS claimant count with rates and proportions

Note: % is a proportion of resident working age people

JSA claimants by age and duration (April 2009)

	East Devon (numbers)	East Devon (%)	Devon (%)	Great Britain (%)
By age of claimant				
Aged 18-24	415	26.8	31.4	29.5
Aged 25-49	800	51.8	49.5	54.3
Aged 50 and over	320	20.7	18.0	15.6

By duration of claim				
Up to 6 months	1,315	85.3	82.5	76.0
Over 6 up to 12 months	175	11.5	13.7	16.3
Over 12 months	50	3.2	3.8	7.7

Source: ONS claimant count - age and duration

Note: % is a proportion of all JSA claimants

Working-age client group - key benefit claimants (August 2008)

	East Devon (numbers)	East Devon (%)	Devon (%)	Great Britain (%)
Total claimants	6,700	9.5	10.9	14.2
Job seekers	620	0.9	1.2	2.4
Incapacity benefits	3,700	5.3	5.9	7.0
Lone parents	640	0.9	1.2	2.0
Carers	680	1.0	1.0	1.1
Others on income related benefits	210	0.3	0.4	0.5
Disabled	600	0.9	1.0	1.0
Bereaved	240	0.3	0.3	0.3
Key out-of-work benefits†	5,180	7.3	8.6	11.9

Source: DWP benefit claimants - working age client group

† Key out-of-work benefits consists of the groups: job seekers, incapacity benefits, lone parents and others on income related benefits

Note: % is a proportion of resident working age people

LABOUR DEMAND

Jobs density (2006)

	East Devon (jobs)	East Devon (density)	Devon (density)	Great Britain (density)
Jobs density	64,000	0.91	0.88	0.88

Source: ONS jobs density

Notes: The density figures represent the ratio of total jobs to working-age population.
Total jobs includes employees, self-employed, government-supported trainees and HM Forces

Employee jobs (2007)

	East Devon (employee jobs)	East Devon (%)	Devon (%)	Great Britain (%)
Total employee jobs	41,900	-	-	-
Full-time	25,300	60.4	63.3	69.0
Part-time	16,600	39.6	36.7	31.0
Employee jobs by industry				
Manufacturing	3,000	7.3	9.8	10.6
Construction	2,700	6.3	5.8	4.9
Services	35,000	83.6	83.0	83.0
Distribution, hotels & restaurants	12,600	30.2	27.6	23.3
Transport & communications	2,900	6.9	6.1	5.9
Finance, IT, other business activities	5,200	12.4	14.3	21.6
Public admin, education & health	11,500	27.6	29.8	26.9
Other services	2,700	6.5	5.1	5.2
Tourism-related†	6,000	14.4	11.0	8.2

Source: ONS annual business inquiry employee analysis

- Data unavailable

† Tourism consists of industries that are also part of the services industry (see the definitions section)

Notes: % is a proportion of total employee jobs
Employee jobs excludes self-employed, government-supported trainees and HM Forces

Earnings by workplace (2008)

	East Devon (pounds)	Devon (pounds)	Great Britain (pounds)
Gross weekly pay			
Full-time workers	380.0	400.0	479.1
Male full-time workers	445.6	437.5	523.5
Female full-time workers	331.2	337.1	412.4

Hourly pay

Full-time workers	9.40	9.61	12.00
Male full-time workers	10.40	10.10	12.69
Female full-time workers	8.36	8.88	10.95

Source: ONS annual survey of hours and earnings - workplace analysis

Note: Median earnings in pounds for employees working in the area.

Jobcentre plus vacancies (April 2009)

	East Devon	Devon	Great Britain
Unfilled jobcentre vacancies (numbers)	343	2,601	212,718
Unfilled jobcentre vacancies per 10,000 working age population	49	59	58
JSA claimants per unfilled jobcentre vacancy	4.5	4.4	7.1

Source: Jobcentre Plus vacancies - summary analysis

BUSINESSES

VAT registered businesses (2007)

	East Devon (numbers)	East Devon (%)	Devon (%)	Great Britain (%)
Registrations	395	7.3	7.1	10.2
Deregistrations	335	6.2	6.2	7.3
Stock (at end of year)	5,445	-	-	-

Source: BERR - vat registrations/deregistrations by industry

Note: % is a proportion of stock (at end of year)

Definitions and Explanations

RESIDENT POPULATION

The estimated population of an area includes all those usually resident in the area, whatever their nationality. HM Forces stationed outside the United Kingdom are excluded but foreign forces stationed here are included. Students are taken to be resident at their term-time address.

Working age includes males aged 16 to 64 and females aged 16 to 59.

LABOUR SUPPLY

Labour supply consists of people who are employed, as well as those people defined as unemployed or economically inactive, who can be considered to be potential labour supply. Information in this section relates to the characteristics of people living in an area.

Most labour supply data comes from the Annual Population Survey (APS). The APS is the largest regular household survey in the United Kingdom. It includes data from the Labour Force Survey (LFS), plus further sample boosts in England, Wales and Scotland. The survey includes data from a sample of around 256,000 people aged 16 and over.

As APS estimates are based on samples, they are subject to sampling variability. This means that if another sample for the same period were drawn, a different estimate might be produced. In general, the larger the number of people in a sample, the smaller the variation between estimates. Estimates for smaller areas such as local authorities are therefore less reliable than those for larger areas such as regions. When the sample size is too small to produce reliable estimates, the estimates are replaced with a #.

Working age: always refers to females aged 16 to 59 and males aged 16 to 64.

Economically Active

Economically active: People who are either in employment or unemployed.

Economic activity rate: People, who are economically active, expressed as a percentage of all people.

In employment: People who did some paid work in the reference week (whether as an employee or self employed); those who had a job that they were temporarily away from (eg, on holiday); those on government-supported training and employment programmes; and those doing unpaid family work.

Employment rate: The number of people in employment expressed as a percentage of all people.

Employees and self employed: The division between employees and self employed is based on survey respondents' own assessment of their employment status. The percentage show the number in each category as a percentage of all working age people. The sum of employees and self employed will not equal the in **employment** figure due to the inclusion of those on government-supported training and employment programmes, and those doing unpaid family work in the latter.

Unemployed: Refers to people without a job who were available to start work in the two weeks following their interview and who had either looked for work in the four weeks prior to interview or were waiting to start a job they had already obtained.

Model-based unemployed: As unemployed form a small percentage of the population, the APS unemployed estimates within local authorities are based on very small samples so for many areas would be unreliable. To overcome this ONS has developed a statistical model that provides better estimates of total unemployed for unitary authorities and local authority districts (unemployment estimates for counties are direct survey estimates). Model-based estimates are not produced for male or female unemployed.

The model-based estimate improves on the APS estimate by *borrowing strength* from the claimant count to produce an estimate that is more precise (i.e. has a smaller confidence interval). The claimant count is not itself a measure of unemployment but is strongly correlated with unemployment, and, as it is an administrative count, is known without sampling error. The gain in precision is greatest for areas with smaller sample sizes.

Unemployment rate: Unemployed as a percentage of the economically active population.

Economically Inactive

Economically inactive: People who are neither in employment nor unemployed. This group includes, for example, all those who were looking after a home or retired.

Wanting a job: People not in employment who want a job but are not classed as unemployed because they have either not sought work in the last four weeks or are not available to start work.

Not wanting a job: People who are neither in employment nor unemployed and who do not want a job.

Occupation

Occupations are classified according to the Standard Occupation Classification 2000. Descriptions of the job titles included in each code are available in the SOC manuals which can be downloaded from: http://www.statistics.gov.uk/methods_quality/ns_sec/soc2000.asp

Qualifications

Qualifications data are only be available from the APS for calendar year periods, for example, Jan to Dec 2005. The variables show the total number of people who are qualified at a particular level and above, so data in this table are not additive. Separate figures for each NVQ level are available in the full Annual Population Survey data set (wizard/advanced query).

The trade apprenticeships are split 50/50 between NVQ level 2 and 3. This follows ONS policy for presenting qualifications data in publications. Separate counts for trade apprenticeships can be obtained from the full APS data set (wizard/advanced query).

No qualifications: No formal qualifications held

Other qualifications: includes foreign qualifications and some professional qualifications

NVQ 1 equivalent: e.g. fewer than 5 GCSEs at grades A-C, foundation GNVQ, NVQ 1, intermediate 1 national qualification (Scotland) or equivalent

NVQ 2 equivalent: e.g. 5 or more GCSEs at grades A-C, intermediate GNVQ, NVQ 2, intermediate 2 national qualification (Scotland) or equivalent

NVQ 3 equivalent: e.g. 2 or more A levels, advanced GNVQ, NVQ 3, 2 or more higher or advanced higher national qualifications (Scotland) or equivalent

NVQ 4 equivalent and above: e.g. HND, Degree and Higher Degree level qualifications or equivalent

Earnings by Residence

The figures show the median earnings in pounds for employees living in the area who are on adults rates of pay and whose pay was not affected by absence. Figures for earnings come from the Annual Survey of Hours and Earnings (ASHE). The ASHE is based on a 1 per cent sample of employees, information on whose earnings and hours is obtained from employers. The survey does not cover self-employed. Information relates to a pay period in April.

The earnings information collected relates to gross pay before tax, national insurance or other deductions, and excludes payments in kind. It is restricted to earnings relating to the survey pay period and so excludes payments of arrears from another period made during the survey period; any payments due as a result of a pay settlement but not yet paid at the time of the survey will also be excluded.

WORKING-AGE BENEFITS

JSA Claimant Count

JSA claimant count records the number of people claiming Jobseekers Allowance (JSA) and National Insurance credits at Jobcentre Plus local offices. People claiming JSA must declare that they are out of work, capable of, available for and actively seeking work during the week in which the claim is made.

The percentage figures express the number of claimants resident in an area as a percentage of the working age population resident in that area. Working age is defined as 16-64 for males and 16-59 for females.

The count of total JSA claimants is mostly derived from the Jobcentre Plus computer records. For various reasons, e.g. a claimant's National Insurance number is not known, a few claims have to be dealt with manually. These clerical claims, which amount to less than 1 per cent of the total, are counted separately and not analysed in as much detail as the computerised claims. The count of total JSA claimants includes clerical claims, but only the computerised claims are analysed by age and duration.

DWP Working-Age Client Group

The number of working-age people (m:16-64, f:16-59) who are claiming one or more key DWP benefits. The key benefits are: bereavement benefit, carer's allowance, disability living allowance, incapacity benefit, severe disablement allowance, income support, jobseeker's allowance, and widow's benefit.

The total count is broken down by statistical groups. These categorise each person according to the main reason why they are claiming benefit. Each client is classified to a single group.

Benefits are arranged hierarchically and claimants are assigned to a group according to the top most benefit they receive. Thus a person who is a lone parent and receives Incapacity Benefit would be classified as incapacity benefits. Cnsequently, the group lone parent will not contain all lone parents as some will be included in the incapacity benefits group and Job seekers groups.

Key out-of-work benefits consists of the groups: job seekers, incapacity benefits, lone parents and others on income related benefits.

LABOUR DEMAND

Labour demand includes jobs and vacancies available within the area.

Jobs Density

The numbers of jobs per resident of working age (16-59/64). For example, a job density of 1.0 would mean that there is one job for every resident of working age.

The total number of jobs is a workplace-based measure and comprises employee jobs, self-employed, government-supported trainees and HM Forces. The number of working age residents figures used to calculate jobs densities are based on the relevant mid-year population estimates.

Employee Jobs

The number of jobs held by employees. Employee jobs excludes self-employed, government-supported trainees and HM Forces, so this count will be smaller than the total jobs figure shown in the Jobs density table. The information comes from the Annual Business Inquiry (ABI) - an employer survey conducted in December of each year. The survey samples around 78,000 businesses. The ABI records a job at the location of an employee's workplace (rather than at the location of the business's main office).

Full-time and part-time: In the ABI, part-time employees are those working for 30 or fewer hours per week.

Tourism-related includes the following sectors:
551 Hotels
552 Camping sites etc
553 Restaurants
554 Bars
633 Activities of travel agencies etc
925 Library, archives, museums etc
926 Sporting activities
927 Other recreational activities

Earnings by Workplace

The figures show the median earnings in pounds for employees working in the area who are on adults rates of pay and whose pay was not affected by absence. Figures for earnings come from the Annual Survey of Hours and Earnings (ASHE). The ASHE is based on a 1 per cent sample of employees, information on whose earnings and hours is obtained from employers. The survey does not cover self-employed. In 2004 information related to the pay period which included 21 April.

The earnings information collected relates to gross pay before tax, national insurance or other deductions, and excludes payments in kind. It is restricted to earnings relating to the survey pay period and so excludes payments of arrears from another period made during the survey period; any payments due as a result of a pay settlement but not yet paid at the time of the survey will also be excluded.

Jobcentre plus vacancies

The figures in the tables are based on the number of live unfilled vacancies handled by Jobcentre Plus. These are vacancies actively available to jobseekers on the count date and are derived as a by-product of administrative systems. Users should be aware of the following points when using and interpreting the series:

- Coverage relates just to vacancies notified to Jobcentre Plus and as such represent a market share of vacancies throughout the whole economy. This proportion varies over time, according to the occupation of the vacancy and industry of the employer, and by local area.
- The time-series is susceptible to discontinuities arising from changes to vacancy taking and vacancy handling (e.g. 2006 changes to employer follow-up processes).
- Local area data can throw up spurious figures. For example, Lincoln local authority includes all national vacancies notified by the Ministry of Defence since these are recorded against a single central postcode irrespective of actual location.

For further details see: https://www.nomisweb.co.uk/articles/406.aspx

BUSINESSES

VAT Registered Businesses

VAT registrations and de-registrations are the best official guide to the pattern of business start-ups and closures. They are an indicator of the level of entrepreneurship and of the health of the business population. As such they are used widely in regional and local economic planning.

These figures do not, however, give the complete picture of start-up and closure activity in the economy. Some VAT exempt sectors and businesses operating below the threshold for VAT registration are not covered. At the start of 2005, the VAT threshold was an annual turnover of ? 58,000, and 1.8 million of the estimated 4.3 million enterprises in the UK were VAT-registered.

However, some businesses do voluntarily register for VAT even though their turnover is below the threshold. Data for 2005 shows that around a fifth of all registrations have turnover below the VAT threshold.

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Economic Trends report

Exeter & the Heart of Devon

FEBRUARY 2009

Produced by the Economy & Tourism Unit, Exeter City Council

Welcome to the latest quarterly edition of the Exeter and the Heart of Devon's sub-region (EHOD) 'Economic Trends Report', produced by the Economy & Tourism Unit of Exeter City Council, covering social, economic and demographic issues in relation to the sub-region of Exeter, East Devon, Mid Devon and Teignbridge.

Abstract

Key Information, Page 2
Headline information for the EHOD area covering population, employment and housing.

Claimant Count, Page 3
The Claimant Count (unemployment) in the EHOD sub-region has risen steadily to 2.1%. Exeter's unemployment stands at 2.2%, but below the regional and national averages.

House Prices, Page 4
Q3 2007_Land Registry data shows that average house prices have risen slightly but sales have fallen sharply over the last quarter in all areas. EHOD prices dropped by around 3% on last year's figures with sales down 55%. The average house price in EHOD for Q3 2008 is now £239,700. East Devon has the highest property prices while Exeter witnessed the only positive annual growth rate on Q3 2007 at 1.8%.

Mid year 2007 Population, Page 6
The population estimates for EHOD now stands at around 457,400 and has increased by nearly 7% since 2001. Within this period, Exeter (+10.1%) has seen the highest rise of all districts, at more than twice the regional and national averages (+4.7% and +3.3% respectively).

VAT/PAYE Registrations and Stocks, Page 11
Around 19,145 businesses were registered for VAT/PAYE in EHOD in 2008 and 3,645 were registered for VAT/PAYE in Exeter.

Annual Survey of Hours and Earnings, Page 8
The 2008 ASHE Survey reveals that the average annual median resident based salary for EHOD stood at £21,900, an increase of around 5.8% on 2007. The median workplace based salary stood at £21,400.

Exeter Chamber of Commerce Survey, Page 12
The December 2008 survey reveals continued but reduced commitment towards investment despite potential job contraction and a dip in business confidence.

Definitions of the statistical measures, geographic areas and sources of information used in this report are provided on Page 12. Click here to go directly to this information; where statistical terms appear in this report they are hyperlinked to the definitions.

Exeter City Council

Exeter
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Key Information

Population

Indicator	Exeter	East Devon	Mid Devon	Teignbridge	EHOD	E&W
[1]Population	122,400	132,300	75,900	126,800	457,400	54,072,000
[1]Population under 16	18,300 (15.0%)	21,100 (15.9%)	14,400 (19.0%)	21,800 (17.2%)	75,600 (16.5%)	10,212,300 (18.9%)
[1]Population of working age	82,900 (67.7%)	70,400 (53.2%)	44,500 (58.6%)	72,300 (57.0%)	270,100 (59.1%)	33,588,500 (62.1%)
[1]Population of retirement age	21,200 (17.3%)	40,800 (30.9%)	17,000 (22.4%)	32,700 (25.8%)	111,700 (24.4%)	10,271,200 (19.0%)

Employment

Indicator	Exeter	East Devon	Mid Devon	Teignbridge	EHOD	E&W
[2]No of employee jobs located in area	84,215	41,863	24,951	41,101	192,130	24,191,538
[2]Primary-sector* employees	2,060 (2.4%)	1,173 (2.8%)	1,226 (4.9%)	1,110 (2.7%)	5,569 (2.9%)	339,671 (1.4%)
[2]Secondary-sector* employees	7,800 (9.3%)	5,698 (13.6%)	5,835 (23.4%)	7.011 (17.1%)	26,344 (13.7%)	3,753,732 (15.5%)
[2]Service-sector* employees	74,355 (88.3%)	34,992 (83.6%)	17,889 (71.7%)	32,980 (80.2%)	160,217 (83.4%)	20,098,135 (83.1%)
[2]No of employee jobs located in area that are part-time (<30 hrs)	28,041 (33.3%)	16,580 (39.6%)	8,947 (35.9%)	15,500 (37.7%)	69,068 (35.9%)	7,487,056 (30.9%)
[2]Number of employers	5,139	5,589	3,264	5,366	19,359	2,216,609
[3]Total jobs**	95,000	54,000	32,000	49,000	228,000	29,420,000

House Prices/Earnings

Indicator	Exeter	East Devon	Mid Devon	Teignbridge	EHOD	E&W
[4]Average house price	£217,800	£266,100	£228,700	£229,900	£239,700	£224,100
[6]Median full-time annual earnings (residence-based)	£21,300	£21,700	£20,100	£24,500	£21,900	£25,400
[6]House price to FT salary ratio	10.2	12.2	11.4	9.4	10.9	8.8

Claimant Count (unemployment)

Indicator	Exeter	East Devon	Mid Devon	Teignbridge	EHOD	E&W
[5]Claimant count rate	2.2%	1.8%	2.1%	2.2%	2.1%	3.4%
[5]Male claimant count rate	3.1%	2.5%	2.9%	3.1%	2.9%	4.8%
[5]Female claimant count rate	1.3%	1.0%	1.2%	1.2%	1.1%	1.8%

Economic Activity and Skills

Indicator	Exeter	East Devon	Mid Devon	Teignbridge	EHOD	E&W
[7]Economic activity rate	78.2%	86.8%	79.9%	83.6%	82.2%	78.6%
[7]Male economic activity rate	76.7%	89.7%	89.8%	84.5%	84.4%	83.2%
[7]Female economic activity rate	80.0%	83.6%	68.8%	82.6%	79.8%	73.6%
[7]Educated to A-level or above	56.3%	49.8%	46.5%	51.9%	51.8%	45.9%
[7]Educated to degree level	30.0%	29.1%	27.0%	28.8%	28.9%	28.1%

Click here for information on data sources

* - 'Primary sector' covers agriculture, fishing, energy & water, 'Secondary sector' covers manufacturing & construction.

** - 'Jobs' includes employees of businesses, plus self-employed jobs, government supported employees & HM Forces.

Latest Data

Claimant Count (unemployment)

The claimant count rate in EHOD has risen steadily since Q2 2008 but remains low, standing below that of Devon, South West, South East and National averages. The rate is higher in Exeter and Teignbridge, especially worsening for males; however, it is still below the local, regional and national rate. In total, there were around 5,585 claimants in EHOD out of which 1,831 came from Exeter in January 2009.

Claimant count rates, January 2009

Area	Rate (all)	Rate (M)	Rate (F)
Exeter	2.2%	3.1%	1.3%
East Devon	1.8%	2.5%	1.0%
Mid Devon	2.1%	2.9%	1.2%
T'bridge	2.2%	3.1%	1.2%
EHOD	2.1%	2.9%	1.1%
Devon	2.7%	3.8%	1.5%
SW	2.5%	3.5%	1.4%
SE	2.4%	3.3%	1.3%
E&W	3.4%	4.8%	1.8%

Crown Copyright (Source 5)

The table below reveals a rise in the claimant count rate in all areas without exceptions since last year, with the highest rise marginally more noticeable for Teignbridge, Devon and the South West region.

Past and present Claimant Count rates

Area	Jan 2008	Jul 2008	Jan 2009
Exeter	1.2%	1.4%	2.2%
E. Devon	0.9%	0.8%	1.8%
M. Devon	1.1%	1.2%	2.1%
T'bridge	1.1%	1.0%	2.2%
EHOD	1.1%	1.1%	2.1%
Devon	1.6%	1.6%	2.7%
SW	1.3%	1.4%	2.5%
SE	1.3%	1.4%	2.4%
E&W	2.2%	2.3%	3.4%

Crown Copyright (Source 5)

Starting from historically low figures, the following table highlights how Job Seekers Allowance (JSA) claimant numbers have changed since the beginning of the "Credit Crunch". Numbers have consistently risen over the last year, slightly above local, regional and national trends. After having reached their lowest ever recorded rate back in November 2007, the rise in Exeter has been significant but nonetheless, JSA claimants only represent 2.2% of the city resident working age population.

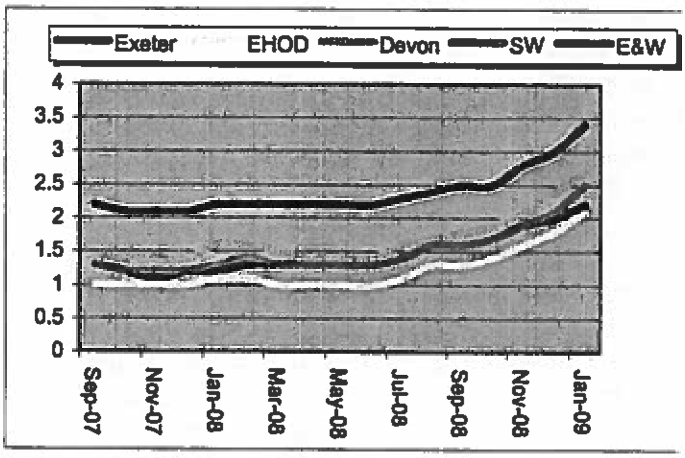
JSA Claimant numbers-"Credit Crunch" January 2009 Round up.

Area	Growth on last month	JSA Claimants numbers		Growth Year on Year (Jan08-Jan09)
		Jan08	Jan09	
Exeter	+10.1%	1,007	1,831	+81.8%
East Dev	+15.2%	663	1,269	+91.4%
Mid Dev	+13.9%	486	919	+89.1%
T'bridge	+11.7%	754	1,566	+107.7%
EHOD	+12.3%	2,910	5,585	+91.9%
Devon	+12.5%	10,354	18,158	+75.4%
SW	+15.1%	41,126	76,814	+86.8%
SE	+14.8%	68,109	119,776	+75.9%
E&W	+11.2%	732,020	1,134,158	+54.9%

Crown Copyright (Source 5)

The following chart highlights how the claimant count rate has consistently risen since the Sub Prime crisis emerged in late Q3 2007, with a more pronounced rise visible since late Q3 2008.

Claimant Count rates, Sept 2007-Jan 2009



Crown Copyright (Source 5)

Exeter City Council

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Exeter It's a Capital City

The table below highlights the claimant rates rise in Exeter and the 14 major urban settlements within EHOD since the beginning of the Credit Crunch; Crediton has seen the highest jump closely followed by Axminster, Teignmouth, Newton Abbot and Dawlish (whose rate have more than doubled). Sidmouth and Ottery, appear less affected so far.

Claimant Count rates within EHOD major settlements, September 2007, January 2009

Settlement	Rate Sept 07 (all)	Rate Dec 08 (all)
Teignmouth	1.5%	3.1%
Tiverton	1.5%	3.0%
Newton Abbot	1.3%	2.9%
Axminster	1.0%	2.6%
Dawlish	0.8%	2.5%
Crediton	0.9%	2.4%
Exmouth	1.0%	2.4%
Exeter	1.3%	2.2%
Honiton	0.9%	2.2%
Seaton	1.0%	2.2%
Kingsteignton	0.6%	2.0%
Cullompton	1.0%	1.9%
Bovey	0.8%	1.6%
Sidmouth	0.9%	1.5%
Ottery	0.5%	1.2%

Crown Copyright (Source 5)

House Price Data

The average house price in EHOD in the second quarter of 2008 was £239,700 which is above the Devon, South West and national averages.
This highlights an increase of 215% on the average price at the end of 1998 and stands at 11.6 times median full-time earnings, a significant larger ratio than the averages for Devon, the South West, South East and England and Wales. Within EHOD, the highest averages prices were seen in East Devon, with the lowest in Exeter.

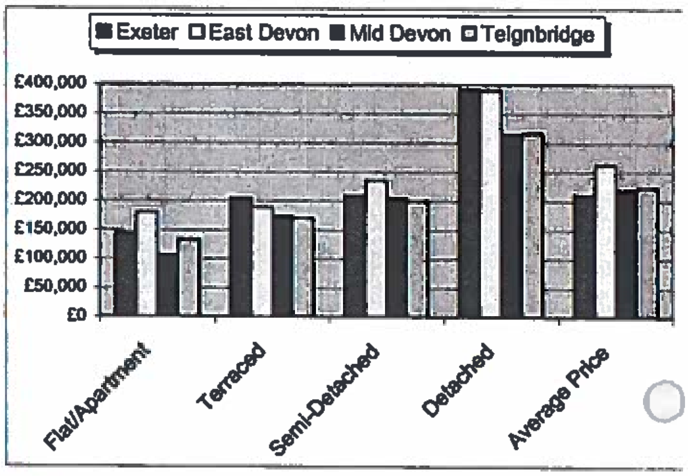
The only positive growth rate was seen in Exeter, at nearly 2 percent; while all other areas saw negative growth rates (-5.6% in East Devon, -3.1% in EHOD, -5.3% for Devon, -2.8% for England and Wales). This may indicate a resilient housing market within Exeter, seemingly 'weathering the storm' so far.

Average house prices, Jul-Sep 2008

Area	Price	Index*	Ratio**
Exeter	£217,800	338	10.7
E. Devon	£266,100	297	12.2
M. Devon	£228,700	305	11.7
T'bridge	£229,900	297	11.0
EHOD	£239,700	316	11.6
Devon	£220,400	305	10.8
SW	£229,900	281	10.0
SE	£270,600	260	10.2
E&W	£224,100	265	9.2

Crown Copyright (Source 4)
*-Average price in Oct-Dec 1998= 100
**-Average house price to median annual full-time salary.

Average house prices by type in Exeter, East Devon, Mid Devon and Teignbridge, Jul-Sep 2008



Crown Copyright (Source 4)

The two tables below present average house prices by house type, and a weighted average house price that applies national house type weightings to local areas.

This analysis by type reveals that within EHOD, prices are generally slightly higher in Exeter for semis and terraced houses, while East Devon's detached properties narrowly top the list. Average flat prices are still amongst the lowest, with Mid Devon prices more than two times cheaper than the national average.

House prices by type, Jul-Sep 2008

Area	Detached	Semi	Terraced	Flat
Exeter	£384k	£221k	£211k	£150k
E. Devon	£385k	£220k	£183k	£184k
M. Devon	£308k	£209k	£171k	£87k
T'bridge.	£321k	£214k	£167k	£138k
EHOD	£351k	£217k	£187k	£155k
Devon	£339k	£199k	£174k	£155k
SW	£344k	£206k	£181k	£166k
SE	£452k	£246k	£203k	£171k
E&W	£345k	£197k	£178k	£200k

Crown Copyright (Source 4)

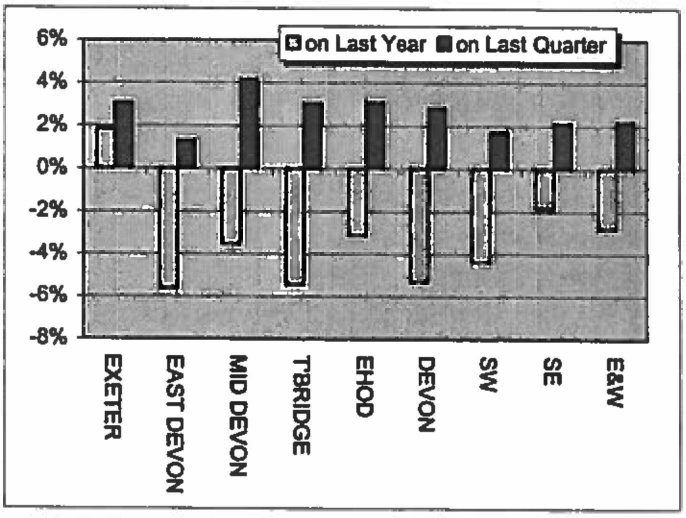
Weighted average house prices, Jul-Sep 2008

Area	Price	Index*	Ratio**
Exeter	£239,300	341	11.7
E. Devon	£237,800	295	10.9
M. Devon	£194,600	297	9.9
T'bridge	£207,900	294	10.0
EHOD	£224,900	309	10.9
Devon	£213,500	302	10.5
SW	£220,600	282	9.6
SE	£263,100	255	9.9
E&W	£224,100	265	9.2

Crown Copyright (Source 4)
*-Average price in Oct-Dec 1998= 100
**-Average house price to median annual full-time salary.

The following chart reveals that house prices in EHOD decreased by about 3.1% between the third quarter of 2007 and the third quarter of 2008, but also rose by a similar rate on the previous quarter. The year on year data shows that negative growth in EHOD is below local and regional figures but above the South East and national figures. Exeter was the only area where average house prices rose by 1.8%, whilst East Devon saw the highest decrease, with average house prices some 5.6% below levels seen in the third quarter of 2007.

Percentage change in house prices, Jul-Sep 2008



Crown Copyright (Source 4)

The table below presents information regarding the number of house sales per quarter. The number of houses sold in all EHOD areas has been more than halved compared with the third quarter of 2007 and sales are undeniably down everywhere, reflecting the current national picture. The greatest fall in the number of properties sold occurred in Teignbridge, with almost 60% less sales year on year.

Trend in Number of Home Sales

Area	Q3 2007	Q1 2008	Q3 2008	Annual Change Q3 2007/08
Exeter	706	355	310	-56.1%
E. Devon	920	483	458	-50.2%
M.Devon	469	243	204	-56.5%
T'bridge	776	401	312	-59.8%
EHOD	2871	1482	1284	-55.3%
Devon	7167	3726	3273	-54.3%
SW	32637	16653	14969	-54.1%
SE	74419	38840	33086	-55.5%
E&W	306743	167050	138487	-54.9%

Crown Copyright (Source 4)

As a comparison and to show the evolution of the situation, the table overleaf presents information regarding the number of house sales published last quarter.

Exeter City Council

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Trend in Number of Home Sales

Area	Q2 2007	Q4 2007	Q2 2008	Annual Change Q2 2007/08
Exeter	638	551	397	-37.8%
E. Devon	859	739	516	-39.9%
M.Devon	399	366	248	-37.8%
T'bridge	684	643	420	-38.6%
EHOD	2580	2299	1581	-38.7%
Devon	6666	5941	4156	-37.6%
SW	30153	27600	19045	-36.8%
SE	66220	63138	41365	-37.5%
E&W	282465	264783	179141	-36.6%

Crown Copyright (Source 4)

Population 2007

This section summarises Information on EHOD from the mid-year population estimates for 2007. The table below reveals that around 457,400 persons are residents in EHOD, of which 222,000 were males and 235,400 were females.

Total population 2007

Area	Male	Female	Total
Exeter	60,400	62,000	122,400
E Devon	63,200	69,100	132,300
M Devon	37,300	38,600	75,900
T'bridge	61,100	65,700	126,800
EHOD	222,000	235,400	457,400
Devon	553,700	581,300	1,135,000
SW	2,536,200	2,641,800	5,178,000
SE	4,071,300	4,237,300	8,308,600
E&W	26,568,500	27,503,500	54,072,000

Crown copyright (Source 1) Note: Figures may not add due to rounding.

The following table indicates a higher proportion of retirees and a lower proportion of children and working age adults in EHOD compared to local, regional and national averages. The largest proportion of working age adults is seen in Exeter, whilst the largest proportion of retirees is located in East Devon. Mid Devon has the highest proportion of its population aged under 16, with a rate almost equal to the South East and National averages. In total, there were around 270,200 persons of working age in EHOD in 2007.

Population by broad age group, 2007

Area	0-15	16-59f/64m	60f/65m+
Exeter	15.0%	67.7%	17.3%
E Devon	15.9%	53.2%	30.9%
M Devon	19.0%	58.6%	22.4%
T'bridge	17.2%	57.0%	25.8%
EHOD	16.5%	59.1%	24.4%
Devon	17.1%	59.4%	23.5%
SW	17.8%	60.1%	22.1%
SE	19.1%	61.3%	19.6%
E&W	18.9%	62.1%	19.0%

Crown Copyright (Source 1) Note: Figures may not add due to rounding.

The table below highlights the components of population change between 2006 and 2007. Natural change is the difference between births and deaths, and net migration is the balance arising from people moving into or out of an area. In East Devon and Teignbridge, the number of deaths exceeded the number of births. However, the effect of in-migration meant that the population rose by 6,700 in EHOD between 2006 and 2007, with a population increase in all the sub-districts. Altogether, the greatest population rise is observed in Exeter with an increase of around 2.3%, almost twice that of EHOD rise and well above local, regional and national levels.

Components of population change, 2006 to 2007 (thousands)

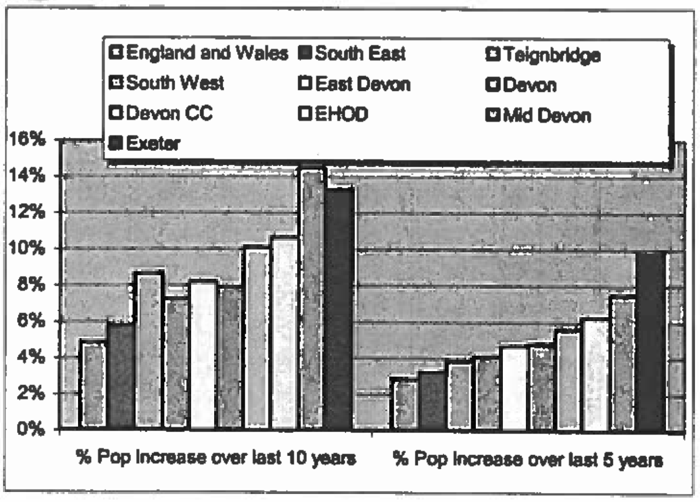
Area	2006	Natural Change	Net Migration	2007
Exeter	119.6	0.2	2.5	122.4
E Devon	131.1	-0.8	2.0	132.3
M Devon	74.5	0.1	1.3	75.9
T'bridge	125.5	-0.3	1.6	126.8
EHOD	450.7	-0.8	7.4	457.4
Devon	1,122.1	-0.8	13.6	1,135.0
SW	5,124.1	3.7	50.2	5,178.0
SE	8,237.7	25.7	45.2	8,308.7
E&W	53,728.8	176.7	166.4	54,072.0

Crown copyright (Source 1) Note: Figures may not add due to rounding.

The following chart shows population growth in all areas over the last 10 and 5 years (1997 and 2002); EHOD's population has grown consistently and at a much faster pace than local, regional and national averages.

Over the last decade, Mid Devon's population has seen the highest growth, with 14.5% increase, whilst since 2002, the fastest growth occurred in Exeter, with a rate of 9.8%. Teignbridge has seen a substantial growth of 8.7% over the last ten years but has since shown signs of slowing down, with a 3.8% growth on 2002 levels.

Percentage of population change, 1997/2002/2007



Crown copyright (Source 1)

Ward Population Estimates

The data used for the population figures in the following tables are derived from government statisticians estimates of population change since the 2001 census.

The following table lists the 'top 10 wards' in EHOD with the highest proportion of young people among their resident populations; 5 wards have more than a fifth of their population under 15 years of age. In absolute numbers, Priory in Exeter has the highest numbers of young people, whilst Bradninch and Halberton in Mid Devon, have the lowest.

Top 10 youngest age population per EHOD wards.

Ward	District	N of 0-15	%
Lowman	Mid Devon	1,423	23.0%
Bradninch	Mid Devon	435	21.1%
Priory	Exeter	1,937	20.4%
Teignmouth W.	Teignbridge	1,025	20.1%
Ex.Withycombe	East Devon	1,486	20.0%
Halberton.	Mid Devon	374	19.2%
Sandford & Creedy	Mid Devon	649	19.0%
Mincinglake	Exeter	1,100	18.8%
Tale Vale	East Devon	447	18.7%
Lower Culm	Mid Devon	1,059	18.6%

Crown Copyright (Source 8)

The following table displays the 'top 10 wards' in EHOD with the highest proportion of working age population among their resident populations. The urban centre of Exeter, with all but one ward, sees the highest density of working age population per ward, a fact reinforced by the strong student presence.

Top 10 working age population per EHOD wards.

Ward	District	N of WA*	%
Duryard	Exeter	5,203	84.6%
St James	Exeter	5,924	81.8%
St David's	Exeter	4,625	79.3%
Polsloe	Exeter	5,164	76.4%
Newtown	Exeter	4,287	75.4%
St Thomas	Exeter	4,535	69.0%
Exwick	Exeter	6,589	68.7%
Exmouth Town	East Devon	4,512	67.0%
St Loyes	Exeter	3,501	65.5%
Pennsylvania	Exeter	3,650	65.2%

Crown Copyright (Source 8)
*Working age: Males 16-64 and Females 16-59

The following table displays the 'top 10 wards' in EHOD with the highest proportion of retirement age population among their resident populations. This reveals that many wards in the coastal settlements of East Devon have the highest density of retirees per ward.

Top 10 elderly population per EHOD wards.

Ward	District	N of Retire	%
Sidmouth Town	East Devon	2,664	51.0%
Budleigh	East Devon	2,607	45.2%
Seaton	East Devon	3,171	44.1%
Sidmouth Rural	East Devon	868	40.4%
Exm'th.Littleham	East Devon	2,700	39.0%
Sidm'th Sidford	East Devon	2,439	38.7%
Bishopsteignton	Teignbridge	954	38.5%
Teignm'th East	Teignbridge	1,781	38.4%
Dunkeswell	East Devon	738	37.0%
Newbridges	East Devon	845	36.2%

Crown Copyright (Source 8)
*Retired: Males 65+ and Females 60+.

Annual Survey of Hours and Earnings

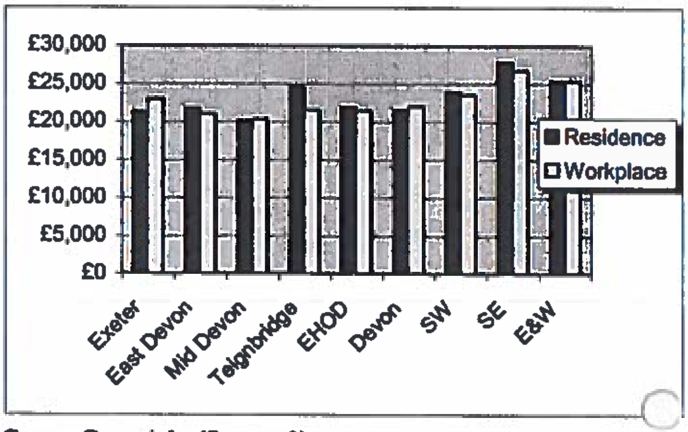
EHOD Data

This survey provides the following measure of earnings: the median, or the middle value in a dataset. The mean average is based on dividing total earnings by the number of people in a given area; it is often being skewed upwards by a small number of high earners. The median provides a lower, but more meaningful measure of earnings, and is used in this report. The 2008 results take account of a small number of methodological changes, which will improve the quality of results. These include changes to the sample design itself. These results are only comparable with the 2007 and 2006 results, which have been produced using this methodology, but are not comparable with results for previous years.

The quality and reliability of these earning estimates are to be treated with caution while comparing the percentages of change for the period covered.

The following graph and table below provides two different annual median average full-time salary figures, one based on where people live, the other on where people work. This reveals that earnings in EHOD are typically below regional and national averages. The workplace average is higher than the residential average in Exeter (£22,900 compared with £21,300), which suggests that the highest earners with a workplace in Exeter, commute in from outside the city, a fact reflected by the higher salaries witnessed in Teignbridge, in particular.

Average median full-time salaries (residence-based and workplace-based), 2008*



Crown Copyright (Source 9)

Area	Residence	Workplace
Exeter	*£21,300*	*£22,900*
East Devon	*£21,700*	*£21,000*
Mid Devon	£20,100	*£20,300*
Teignbridge	£24,500	£21,500
EHOD	£21,900	£21,400
Devon	£21,600	£22,000
SW	£23,900	£23,500
SE	£27,800	£26,700
E&W	£25,400	£25,300

Crown Copyright (Source 6) N.B. SE does not include London

The next table reveals trends in residence-based median full time earnings between 2007 and 2008

There appears to be a significant change in residential median average earnings in Teignbridge with a 17.2% rise, which remains unexplained. East Devon has seen a drop of nearly 1%.

Average median full-time salaries (residence-based), 2007 to 2008* (NB See explanation p 9)

Area	2007	2008	Change 07/08
Exeter	*£20,400*	*£21,300*	+4.4%
East Devon	*£21,900*	*£21,700*	-0.9%
Mid Devon	£19,600	£20,100	+2.6%
Teignbridge	£20,900	£24,500	+17.2%
EHOD	£20,700	£21,900	+5.8%
Devon	£20,400	£21,600	+5.9%
SW	£23,000	£23,900	+3.9%
SE	£26,500	£27,800	+4.9%
E&W	£24,200	£25,400	+5.0%

Crown Copyright (Source 6) N.B. SE does not include London

The following table shows trends in workplace-based median full-time earnings for the same period.

<u>Average median full-time salaries (workplace-based), 2007 to 2008*.</u>

Area	2007	2008	Change 07/08
Exeter	*£21,900*	*£22,900*	+4.6%
East Devon	*£19,700*	*£21,000*	+6.6%
Mid Devon	**£19,000**	**£20,300**	**+6.8%**
Teignbridge	**£20,000**	**£21,500**	**+7.5%**
EHOD	**£20,100**	**£21,400**	**+6.5%**
Devon	**£20,700**	**£22,000**	+6.3%
SW	£22,600	£23,500	+4.0%
SE	£25,500	£26,700	+4.7%
E&W	£24,200	£25,300	+4.5%

Crown Copyright (Source 6) N.B. SE does not include London.

The following table presents the 25- percentile, 50-percentile (median) and 75-percentile full time salaries within EHOD in 2008. For example, in the 25-percentile, salaries within EHOD were below £16,300. Salaries for all percentile ranges in EHOD were below regional and national values.

<u>Full time salaries (residence-based), 2008*</u>

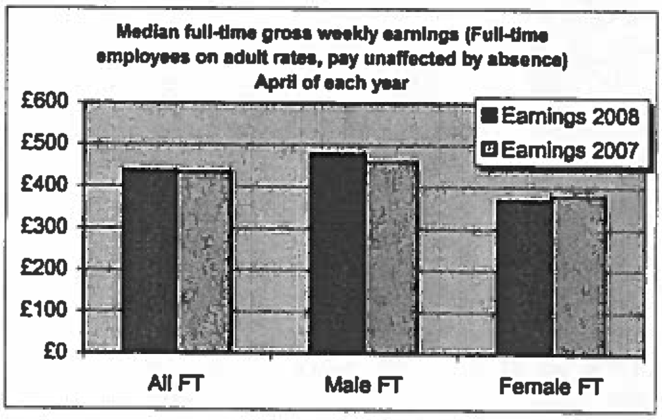
Area	25-percentile	50-percentile (median)	75-percentile
Exeter	*£15,700*	*£21,300*	**£29,400**
East Devon	*£17,000*	*£21,700*	**£30,900**
Mid Devon	**£17,100**	**£20,100**	x
Teignbridge	*£15,700*	**£24,500**	**£36,900**
EHOD	**£16,300**	**£21,900**	x
Devon	**£16,200**	**£21,600**	x
SW	£17,200	£23,900	£33,500
SE	£19,500	£27,800	£40,000
E&W	£17,900	£25,400	£35,900

Crown Copyright (Source 6) x= not available,
N.B. SE does not include London.

*The quality of the earnings figures in the tables is assessed by referring to its coefficient of variation (CV). The CV is the ratio of the standard error of an estimate to the estimate. To help the reader, data of "precise" quality is left with an unchanged font, data deemed "reasonably precise" is in *Italic*, while data deemed "acceptable but to use with caution" is in **bold**.

<u>Exeter Data by Place of Work</u>:

In April 2008, median gross weekly earnings were £438, up 1.15 per cent from £433 in 2007, for full-time earners with a workplace in Exeter; these figures are for adult rates whose earnings were not affected by absence from work. For full-time men, earnings were £479, up 4.4 per cent, compared with £369 for full-time women, down 2.4 per cent.



Crown Copyright (Source 6)

The median gross weekly earnings for all earners was £355, down 0.8 per cent from £358 in 2007.

<u>**Weekly earnings**</u>

Men's gross median full-time weekly earnings increased by 4.4% in the year to April 2008, compared with a decrease of 2.4% for women. Men's and women's median full-time earnings excluding overtime increased by 9.1% and decreased by 3.2% respectively in the year to April 2008.

Part-time median gross weekly earnings were £148 up by 4.4%. The tables overleaf provide more detail.

Median gross weekly earnings			
Employee jobs paid at adult rates and not affected by absence			
£ per week	Full time	Part time	all
Apr-07			
Men	£459.1	NA	£430.0
Women	£378.1	£146.7	£279.0
All	£433.4	£141.9	£358.1
Apr-08			
Men	£479.1	NA	£441.2
Women	£369.1	£159.2	£297.6
All	£438.4	£148.1	£355.1
Per cent change			
Men	4.4%	NA	2.6%
Women	-2.4%	7.1%	6.7%
All	1.2%	4.4%	-0.8%

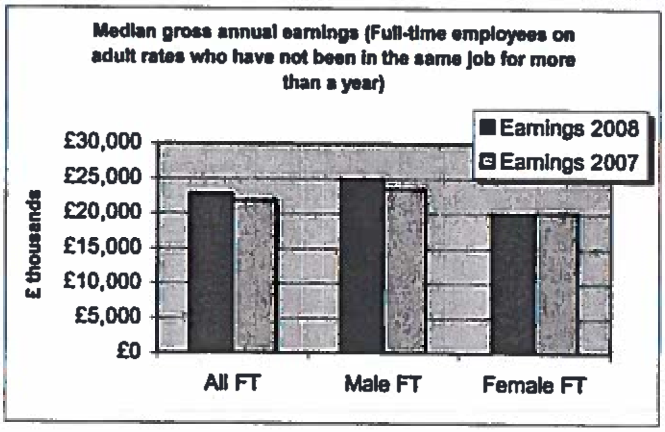
Crown Copyright (Source 6)

Annual earnings

For the tax year ending 5 April 2008, the median gross annual earnings for full-time men were £24,992, up 6.4 per cent from £23,483 in 2007 and for full-time women were £19,984, down 0.3 per cent from £20,053.

Median gross annual earnings for FT employees			
Employees on adult rates who have been in the same job for at least 12 months, including those whose pay was affected by absence			
£ thousands	Men	Women	all
Apr-07	23.5	20.1	21.9
Apr-08	25.0	20.0	22.9
% change	6.4%	-0.5%	4.6%

Crown Copyright (Source 6)



Crown Copyright (Source 6)

Hourly earnings, excluding overtime

Excluding overtime, median hourly earnings of full-time employees on adult rates whose earnings were not affected by absence were £11.17 per hour in April 2008, up 5.6% on 2007. Excluding overtime, the median hourly earnings of full-time men were £11.97, an increase of 6.3%, compared with £10.40 for women, an increase of 2.2%. The stronger growth in full-time men's hourly earnings excluding overtime compared with women's has meant that the gender pay gap has increased to 15.1%, up from 10.6% in 2007.

Median hourly earnings, excl, overtime			
Employees on adult rates and not affected by absence			
£ per week	Full time	Part time	all
Apr-07			
Men	£11.26	NA	£10.89
Women	£10.18	£8.09	£9.30
All	£10.58	£8.10	£10.21
Apr-08			
Men	£11.97	£7.03	£11.17
Women	£10.40	£8.53	£9.43
All	£11.17	£8.00	£10.44
Per cent change			
Men	6.3%	NA	2.6%
Women	2.2%	5.4%	1.4%
All	5.6%	-1.2%	2.3%

Crown Copyright (Source 6)

Distribution of weekly earnings, including overtime

Between 2007 and 2008 the weekly earnings of the bottom decile grew by 3.0 per cent whilst no information was available for the top decile, for full-time employees.

Distribution of gross weekly earnings			
Employees on adult rates and not affected by absence			
£ per week	Full time	Part time	all
Men			
10% earned less than	£283.7	NA	£168.8
50% earned less than	£479.1	NA	£441.2
10% earned more than	NA	NA	NA
Women			
10% earned less than	£238.9	NA	£84.0
50% earned less than	£389.1	£159.2	£297.8
10% earned more than	NA	NA	NA
All			
10% earned less than	£257.4	NA	£104.3
50% earned less than	£438.4	£148.1	£365.1
10% earned more than	NA	NA	NA

Distribution of hourly earnings, including overtime

Full-time male median earnings were £11.98, 5.9 per cent higher than in 2007; for women full-time median earnings were £10.32, up 1.0 per cent.

Distribution of gross hourly earnings, incl overtime			
Employees on adult rates and not affectedby absence			
£ per hour	Full time	Part time	all
Men			
10% earned less than	£6.88	NA	£6.37
50% earned less than	£11.98	£7.03	£11.25
10% earned more than	NA	NA	NA
Women			
10% earned less than	£6.30	£5.68	£5.86
50% earned less than	£10.32	£8.58	£9.45
10% earned more than	NA	NA	NA
All			
10% earned less than	£6.68	£5.60	£6.08
50% earned less than	£11.17	£7.99	£10.46
10% earned more than	NA	NA	NA
CV > 10% and <= 20%	The quality of an estimate is measured by its coefficient of variation (CV), which is the ratio of the standard error of an estimate to the estimate.		
CV > 5% and <= 10%			

UK BUSINESS: ACTIVITY, SIZE AND LOCATION 2008

The data below is produced from a snapshot of the Inter Departmental Business Register (IDBR) taken in March 2008. The IDBR combines the information from three administrative sources in a statistical register comprising over two million enterprises. These comprehensive administrative sources, combined with the survey data, contribute to the coverage on the IDBR, which is one of its main strengths, representing nearly 99 per cent of UK economic activity. The 2008 publication has been enhanced to include enterprises based on PAYE - employers that are not also registered for VAT, extending the scope from the previous VAT based enterprise publication. This is a major improvement to the scope of the publication.

The following table provides the overall number of VAT and/or PAYE Enterprises registered in 2008 for all the areas. Within EHOD, East Devon and Teignbridge have the highest number of VAT registered enterprises, whilst Exeter has the lowest number.

Number of VAT and/or PAYE Enterprises, 2008

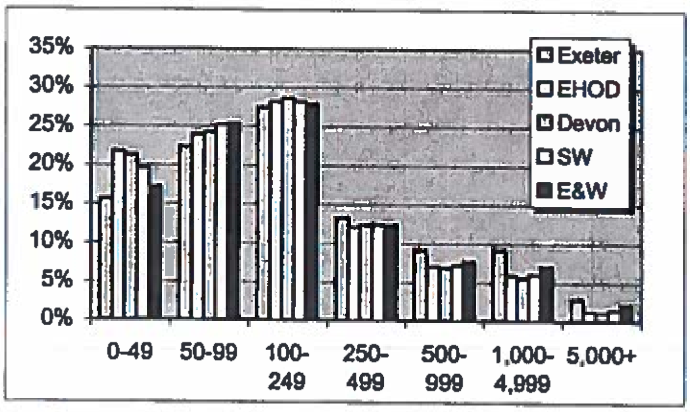
Area	Number
Exeter	3,645
East Devon	5,910
Mid Devon	4,270
Teignbridge	5,320
EHOD	19,145
Devon	44,235
SW	204,540
SE	338,815
E&W	1,944,520

Crown Copyright (Source 9)

The following graph highlights VAT and or PAYE businesses by turnover size band in all areas. EHOD's businesses are more likely to have a turnover below £50k, whilst Exeter's businesses are more likely to have a turnover of £100k to £249k representing around 26% of all registrations.

Exeter also has significantly higher levels of businesses with turnover in excess of £250k than the local, regional and national averages.

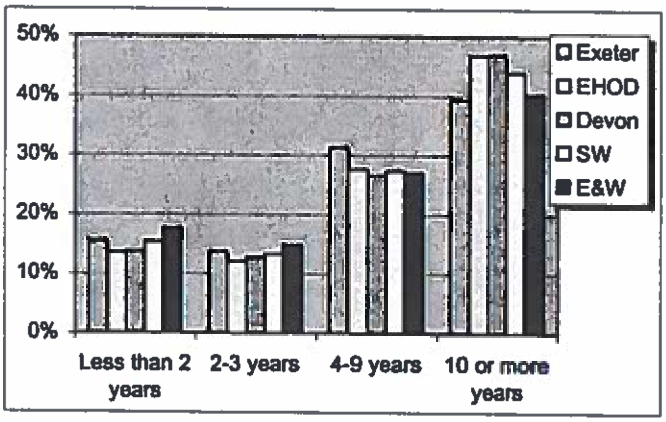
VAT-based enterprises by turnover size band, 2008



Crown Copyright (Source 9)

The graph below shows VAT registered businesses by age of business. Just under 40% of Exeter's VAT registered businesses have been established for over 10 years.

VAT-based enterprises by age of business, 2008



Crown Copyright (Source 9)

The next tables indicate the healthy state of the local economy through business formation and survival. The rate of entrepreneurship is calculated with an indicator that only includes businesses having registered for VAT in 2007 so, unlike previous tables, very small businesses will not be part of it.

The tables reveal that Exeter has the lowest rate of registered and de-registered businesses per 10,000 working age inhabitants (36.8 and 29.5). Within EHOD, the highest rates are seen in East Devon and Teignbridge, with fewer major employers.

VAT Registrations per 10,000 working age population, 2007

Area	Business Reg.	Working Age Pop Estimates 07	Rate per 10k Working-age pop
Exeter	305	82,900	36.8
East Devon	395	70,500	56.0
Mid Devon	240	44,500	53.9
Teignbridge	400	72,300	55.3
EHOD	1,340	270,200	49.6
Devon	3,195	674,700	47.3
SW	17,020	3,111,600	54.7
SE	31,970	5,095,700	62.7
E&W	186,720	33,588,500	55.6

Crown Copyright (Source 10)

VAT De-registrations per 10,000 working age population, 2007

Area	Business Dereg.	Working Age Pop Estimates 07	Rate per 10k Working-age
Exeter	245	82,900	29.5
East Devon	335	70,500	47.5
Mid Devon	230	44,500	51.7
Teignbridge	340	72,300	47.0
EHOD	1,150	270,200	42.5
Devon	2,620	674,700	38.8
SW	12,540	3,111,600	40.3
SE	23,170	5,095,700	45.5
E&W	134,500	33,588,500	40.0

Crown Copyright (Source 10)

Exeter Chamber of Commerce Quarterly Survey Results

The latest findings from the Exeter Chamber of Commerce quarterly business survey are provided in the following table.

The results indicate that 54% of respondents reported sales as static or growing, 60% declaring their margins were mainly the same or growing. Some 74% stated that employment was stable or growing compared with last quarter and that 58% considered that cash flow was the same or growing.

Forecasts for the next quarter on the number of employees show that around two third of businesses envisaged staff levels to remain the same, whilst nearly a quarter of respondents expected it to decrease, hinting at potential job losses in the local economy.

Exeter Chamber of Commerce survey– sales, margins and employees (December 2008).

Indicator	Up	Same	Down
Sales[1]	19%	35%	46%
Margins[1]	10%	50%	40%
Employees[1]	11%	63%	26%
Employees[2]	11%	65%	24%
Cashflow	13%	45%	42%

Source: Exeter Chamber of Commerce, 2008
1 – Change on last quarter, 2 – Forecast for next quarter

The survey also suggests that business confidence, after the peak observed in middle of 2007, has slipped back further with now around a quarter of respondents concerned about the outlook.

This differs somewhat from the levels recorded last year, with 32% of respondents reporting high confidence, 63% reporting medium confidence and only 5% reporting low confidence.

However, more than a third of respondents have kept investing in their business over the last quarter and just a third are expecting to do so in the future.

The next survey is due out in the end of March 2009.

To access the results before the next economic trends report and view the data over the last year, visit:
http://www.exeterchamber.co.uk/Survey-Results/

News and Information

The Centre for Cities, an independent urban policy research unit, has recently published its annual report ranking the economic performance of many UK cities in the face of the current Recession; for more information, visit:
http://www.centreforcities.org/outlook09

The Commission for Rural Communities has recently released its update on how the Index of Multiple Deprivation and its component domains are distributed across rural England, and discusses the extent to which these patterns reflect rural disadvantage and deprivation; for more information, visit:
http://www.ruralcommunities.gov.uk/publications/stateofthecountrysideupdate5ruralanalysisoftheindexofmultipledeprivation2007

The Communities and Local Government website has recently published the Annual volume of Housing Statistics for 2008 which covers all aspects of housing.
For more information on this and the tools it provides, visit:
http://www.communities.gov.uk/publications/corporate/statistics/housingstatistics2008

Useful links

EHOD Online Property Register
For a quick and easy access and to search for our commercial property register, visit:
www.exeter.gov.uk/property

Exeter Business Support
Exeter Business Support is free and provides advice for starting, growing and succeeding in business. For more information, follow this link:
www.exeter.gov.uk/support

For facts and figures from a variety of sources for Exeter, follow this link:
www.exeter.gov.uk/statistics

EHOD Business Relocation Services
For the latest brochure on Exeter and the Heart of Devon as a better climate for business, visit:
http://www.exeter.gov.uk/media/pdf/l/r/Relocation_Brochure.pdf

Sources:
Unless otherwise stated: 1 – ONS Mid-Year Population Estimates 2007; 2 – ONS Annual Business Inquiry 2006; 3 – ONS Jobs Density Indicator 2006; 4 – Land Registry Jul-Sep 2008, 5 – ONS Claimant Count January 2009, 6 – ONS Annual Survey of Hours and Earnings 2008; 7 – ONS Annual Population Survey Jul07/Jun08 (Qualifications Jan07-Dec07); 8 – Ward population estimates, 2006 (experimental); 9 – UK Businesses: Activity, Size and Location 2008; 10 – VAT Reg/Dereg Nomis 2007.

 Counts typically rounded to nearest hundred (to the nearest 10 for the Annual Business Inquiry).

STATISTICAL MEASURES

Measures of average

Mean – The sum of all values divided by the total number of values
Median – Middle value when the data is arranged in order (e.g. in the range 2-3-5-6-6, 5 is the median)
Mode – Most frequently occurring value (e.g. in the range 2-3-5-6-6, the mode is 6 as it occurs twice)
Measures of dispersion (data ranges)
Percentile – Any of the 99 numbered points that divide an ordered set of scores into 100 parts each of which contains one-hundredth of the total. For example, if 65% of the scores were below yours, then your score would be the 65th percentile
Decile – As percentile, but with the set of scores divided into tenths (10% groups)
Quartile – As percentile, but with the set of scores divided into fourths (25% groups).

Geographical Definition:
– 'Exeter', 'East Devon', 'Mid Devon' & 'Teignbridge' relate to the district areas; 'EHOD' is Exeter and Heart of Devon, which encompasses the districts of Exeter, East Devon, Mid Devon and Teignbridge; 'Devon' is the historic county area including Plymouth and Torbay; 'SW' is the South West region, 'SE' is the South East region and 'E & W' is England and Wales.

This report is produced quarterly with the next edition due around May/June 2009 which is likely to include new 2007 Annual Business Inquiry data.

If you have any questions, comments or suggestions, my contact details are provided below.

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Added Notes on Employment

Notes on Job density indicator data (3)

Total jobs is a workplace-based measure of jobs and comprises:

Employees (from the Annual Business Inquiry), self-employment jobs (from the Annual Population Survey), government-supported trainees (from DfES and DWP) and HM Forces (from MoD).

The number of jobs in an area is composed of jobs done by residents (of any age) and jobs done by workers (of any age) who commute into the area.

The sample for East Devon showed a discrepancy of 10,000 jobs between 2005 and 2006. ONS was consulted on this matter and suggested that the data was potentially flawed by the high turnover of self-employed jobs in East Devon. Consequently East Devon and EHOD averages are to be used with extreme caution.

Notes on No of employee jobs located in area (2)

The sample for Exeter showed a total loss of around 4,000 jobs between 2006 and 2007 (from 88,208 in 2006 to 84,215 in 2007). ONS was consulted on this matter and suggested that the decrease is due to one large company in the area which reported all its employees at one particular site for 2006 whereas for 2007 onwards, it is now reporting the distribution of their employees throughout all their workplaces. Their files for 2006 are now closed and it is not possible to make any amendment to the dataset. Consequently Exeter and EHOD figures are to be used with caution.