

# Economic Trends report



**APRIL 2008**

**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 is low at 1.0%, a little more than half the national average. Exeter's unemployment stands at 1.3%, in line with the South West rate.

### [House Prices, Page 4](#)

House prices and sales have fallen slightly over the last quarter in all areas, following the national trend but EHOD prices grew by 5.3% on last year's figures. The average house price in EHOD for Q4 2007 is now £236,500. East Devon has the highest property prices while Teignbridge witnessed the highest annual growth rate at nearly 9.9%. The national growth rate was 7.1%.

### [Annual Business Inquiry 2006, Page 6](#)

In 2006, around 18,990 businesses employing 194,000 people were identified in the EHOD sub-region, which represented a 20% increase in the number of business and a 23% increase on employee numbers since 1998.

### [Indices of Multiple Deprivation 2007, Page 7](#)

Overall levels of deprivation are low in EHOD with some pockets of severe deprivation in some parts of Exeter and to a lesser extent in other urban centres.

### [Ward Population Estimates, Page 10](#)

An updated look at some of EHOD wards in terms of younger age, working age and elderly population reveals higher levels of younger people in Exeter, whilst there are more retired people in most of East Devon's seaside resorts.

### [Exeter Chamber of Commerce Survey, Page 9](#)

The March 2008 survey reveals a stable level of business confidence and a relatively positive outlook in investment plans.

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.

## Key Information

<b>Population</b>						
<b>Indicator</b>	<b>Exeter</b>	<b>East Devon</b>	<b>Mid Devon</b>	<b>Teignbridge</b>	<b>EHOD</b>	<b>E&amp;W</b>
<sup>1</sup> Population	119,600	131,100	74,500	125,500	450,700	53,728,800
<sup>1</sup> Population under 16	18,300 (15.3%)	21,000 (16.0%)	14,200 (19.1%)	21,700 (17.3%)	75,200 (16.7%)	10,235,100 (19.0%)
<sup>1</sup> Population of working age	80,600 (67.3%)	70,100 (53.5%)	43,800 (58.8%)	71,800 (57.2%)	266,300 (59.1%)	33,416,600 (62.2%)
<sup>1</sup> Population of retirement age	20,700 (17.4%)	40,000 (30.5%)	16,500 (22.1%)	32,000 (25.5%)	109,200 (24.2%)	10,077,100 (18.8%)
<b>Employment</b>						
<b>Indicator</b>	<b>Exeter</b>	<b>East Devon</b>	<b>Mid Devon</b>	<b>Teignbridge</b>	<b>EHOD</b>	<b>E&amp;W</b>
<sup>2</sup> No of employee jobs located in area	88,114	40,591	24,678	40,640	194,022	23,950,036
<sup>2</sup> Primary-sector* employees	1,770 (2.0%)	1,072 (2.6%)	1,143 (4.6%)	1,003 (2.5%)	4,988 (2.6%)	310,619 (1.3%)
<sup>2</sup> Secondary-sector* employees	7,822 (8.9%)	5,302 (13.1%)	5,607 (22.7%)	6,867 (16.9%)	25,598 (13.2%)	3,758,271 (15.7%)
<sup>2</sup> Service-sector* employees	78,522 (89.1%)	34,217 (84.3%)	17,928 (72.7%)	32,770 (80.6%)	163,436 (84.2%)	19,881,146 (83.0%)
<sup>2</sup> No of employee jobs located in area that are part-time (<30 hrs)	32,590 (37.0%)	16,384 (40.4%)	8,841 (35.8%)	15,830 (39.0%)	73,646 (38.0%)	7,435,152 (31.0%)
<sup>2</sup> Number of employers	5,012	5,410	3,226	5,342	18,890	2,174,794
<sup>3</sup> Total jobs**	91,000	54,000	31,000	51,000	228,000	27,859,000
<b>House Prices/Earnings</b>						
<b>Indicator</b>	<b>Exeter</b>	<b>East Devon</b>	<b>Mid Devon</b>	<b>Teignbridge</b>	<b>EHOD</b>	<b>E&amp;W</b>
<sup>4</sup> Average house price	£208,900	£259,200	£226,900	£239,700	£236,600	£222,300
<sup>6</sup> Median full-time annual earnings (residence-based)	£20,400	£21,900	£19,600	£20,900	£20,700	£24,200
<sup>6</sup> House price to FT salary ratio	10.2	11.8	11.6	11.5	11.4	9.2
<b>Claimant Count (unemployment)</b>						
<b>Indicator</b>	<b>Exeter</b>	<b>East Devon</b>	<b>Mid Devon</b>	<b>Teignbridge</b>	<b>EHOD</b>	<b>E&amp;W</b>
<sup>5</sup> Claimant count rate	1.3%	0.8%	1.1%	0.9%	1.0%	2.2%
<sup>5</sup> Male claimant count rate	1.7%	1.1%	1.4%	1.3%	1.4%	3.1%
<sup>5</sup> Female claimant count rate	0.7%	0.5%	0.8%	0.5%	0.6%	1.3%
<b>Economic Activity and Skills</b>						
<b>Indicator</b>	<b>Exeter</b>	<b>East Devon</b>	<b>Mid Devon</b>	<b>Teignbridge</b>	<b>EHOD</b>	<b>E&amp;W</b>
<sup>7</sup> Economic activity rate	77.1%	84.9%	81.8%	84.1%	82.0%	78.4%
<sup>7</sup> Male economic activity rate	76.4%	88.8%	92.1%	87.8%	85.6%	83.3%
<sup>7</sup> Female economic activity rate	77.9%	80.8%	71.0%	80.3%	78.2%	73.2%
<sup>7</sup> Educated to A-level or above	54.5%	45.0%	37.8%	49.2%	47.6%	44.8%
<sup>7</sup> Educated to degree level	25.5%	31.2%	18.5%	26.1%	26.1%	27.0%

[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 remains very low, below that of Devon, South West, South East and National averages. The rate has risen slightly since November in Exeter, especially for males, however, it is still below the local, regional and National rate. In total, there were around 2,740 claimants in EHOD in March 2008.

#### Claimant count rates, March 2008

Area	Rate (all)	Rate (M)	Rate (F)
Exeter	1.3%	1.7%	0.7%
East Devon	0.8%	1.1%	0.5%
Mid Devon	1.1%	1.4%	0.8%
T'bridge	0.9%	1.3%	0.5%
EHOD	1.0%	1.4%	0.6%
Devon	1.5%	2.1%	0.9%
SW	1.3%	1.8%	0.8%
SE	1.4%	1.9%	0.8%
E&W	2.2%	3.1%	1.3%

Crown Copyright (Source 5)

The table below highlights a downward trend in the claimant count rate across all areas over the past 12 months.

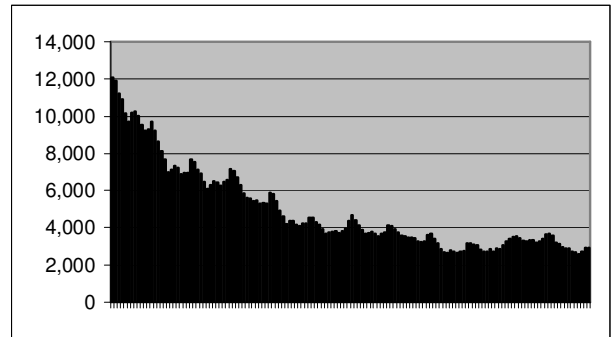
#### Past and present Claimant Count rates

Area	Mar 2007	Sep 2007	Mar 2008
Exeter	1.6%	1.3%	1.3%
E. Devon	1.1%	0.8%	0.8%
M. Devon	1.3%	1.0%	1.1%
T'bridge	1.5%	0.9%	0.9%
EHOD	1.4%	1.1%	1.0%
Devon	1.9%	1.4%	1.5%
SW	1.7%	1.3%	1.3%
SE	1.6%	1.4%	1.4%
E&W	2.5%	2.2%	2.2%

Crown Copyright (Source 5)

The following chart highlights how the claimant count rate has consistently fallen in EHOD over the last 12 years in line with local, regional and national trends. From over 12,000 back in 1996, the number of claimants has dwindled to around 2,700, representing a decrease of 77%, which, compared with the South East (-68%) and England & Wales (-62%), underlines the successful economical performance of the sub-region for more than a decade.

#### Claimant Count rates, Mar 1996-Mar 2008



Crown Copyright (Source 5)

The following table reveals that claimants are more likely to be male, from the 25-44 age band and out of employment for less than three months. For females, the most affected are those in the 16-24 age group, who are also likely to be out of employment for three months or less. In EHOD, around 140 men and 40 women were out of work for a period exceeding twelve months.

#### Claimant count in EHOD by age and duration, Feb 2008

		Under 3 months	3-12 months	12 months+	Total
<b>Males</b>	16 to 24	415	165	10	590
	25 to 44	500	295	70	865
	45 to 64	255	180	60	495
	<b>Total</b>	<b>1,170</b>	<b>640</b>	<b>140</b>	<b>1,950</b>
<b>Females</b>	16 to 24	225	85	5	315
	25 to 44	155	85	15	255
	45 to 64	140	55	20	215
	<b>Total</b>	<b>520</b>	<b>225</b>	<b>40</b>	<b>785</b>
<b>Persons</b>	16 to 24	640	250	15	905
	25 to 44	655	380	85	1,120
	45 to 64	395	235	80	710
	<b>Total</b>	<b>1,690</b>	<b>865</b>	<b>180</b>	<b>2,735</b>

Crown Copyright (Source 5)

## House Price

Despite the recent decline, the average house price in EHOD in the last quarter of 2007 is £236,600, which is still ahead of the Devon, South West and national averages.

This highlights an increase of 50.5% on the average price at the end of 2002 and stands at 11.4 times median full-time earnings, a significant larger ratio than for the Devon, South West, South East and England and Wales averages. Within EHOD, the highest averages prices were seen in East Devon, with the lowest in Exeter.

Annual growth was smallest in Exeter (1.9%) whilst Teignbridge, with a growth of nearly 9.9%, outperformed local, regional and national figures. House prices were down on last quarter for all areas with East Devon being the worst affected (-8.1%) and Teignbridge the least (-1.4%).

### Average house prices, Oct-Dec 2007

Area	Price	Index*	Ratio**
Exeter	£208,900	324	10.2
E. Devon	£259,200	290	11.8
M. Devon	£226,900	303	11.6
T'bridge	£239,700	310	11.5
EHOD	£236,600	311	11.4
Devon	£228,100	315	11.2
SW	£234,800	288	10.2
SE	£266,800	256	10.1
E&W	£222,300	263	9.2

Crown Copyright (Source 4)

\*-Average price in Oct-Dec 1998= 100

\*\* -Average house price to median annual full-time salary.

The two following tables 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 higher in East Devon and Exeter than in Teignbridge and Mid Devon. Average flat prices are the lowest of all, with Mid Devon prices almost two times cheaper than the national average.

### House prices by type, Oct-Dec 2007

Area	Detached	Semi	Terraced	Flat
Exeter	£313k	£220k	£200k	£151k
East Devon	£368k	£237k	£194k	£189k
Mid Devon	£321k	£197k	£179k	£116k
T'bridge.	£349k	£210k	£173k	£167k
EHOD	£346k	£218k	£188k	£166k
Devon	£356k	£207k	£181k	£159k
SW	£353k	£215k	£187k	£169k
SE	£444k	£254k	£211k	£175k
E&W	£343k	£200k	£177k	£201k

Crown Copyright (Source 4)

### Weighted average house prices, Oct-Dec 2007

Area	Price	Index*	Ratio**
Exeter	£218,500	311	10.7
East Devon	£240,400	298	11.0
Mid Devon	£199,700	305	10.2
T'bridge	£217,800	308	10.4
EHOD	£224,000	308	10.8
Devon	£219,300	311	10.8
SW	£224,800	287	9.8
SE	£262,800	255	9.9
E&W	£222,300	263	9.2

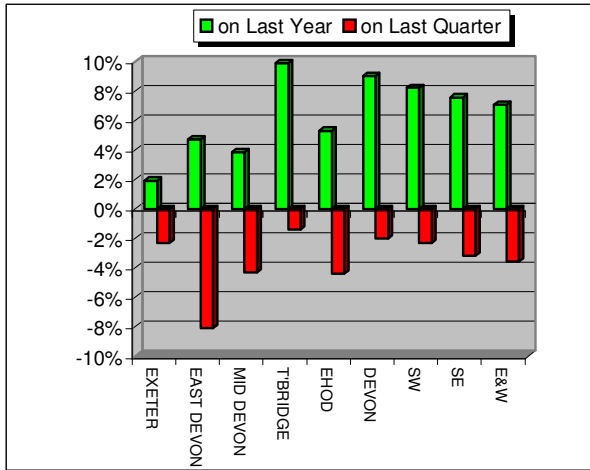
Crown Copyright (Source 4)

\*-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 increased by 5.3% between the last quarter of 2006 and the last quarter of 2007. However, the market recorded a small decline in growth of around 4.4% on the previous quarter. This is marginally worse than local, regional and national figures which also saw a decline.

Percentage change Trends in house prices, Oct-Dec 2007



Crown Copyright (Source 4)

The table below presents information regarding the number of house sales per quarter. There has been a significant fall in house sales in EHOD compared with the previous quarter; sales are also falling in all areas when compared to the last quarter of 2006. This is significantly different from last year's findings and seems to further indicate a slow down in the housing market. The greatest decline in the number of sales occurred in Mid Devon, whilst Teignbridge witnessed the lowest annual change of all EHOD districts.

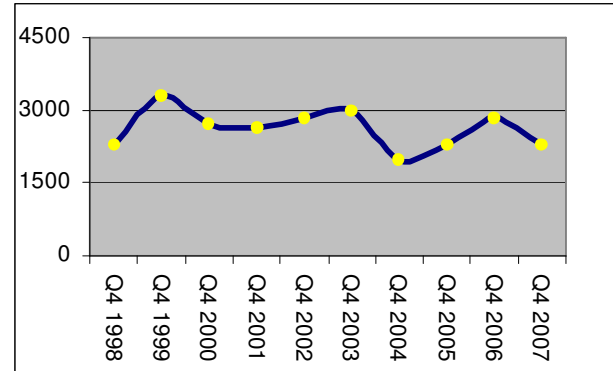
Trend in Number of Home Sales, Oct-Dec 2007

Area	Q4 2006	Q3 2007	Q4 2007	Change Q4 2006/07
Exeter	678	706	551	-18.7%
E. Devon	926	920	739	-20.2%
M. Devon	497	469	366	-26.4%
T' bridge	734	776	643	-12.4%
EHOD	2835	2871	2299	-18.9%
Devon	7381	7167	5941	-19.5%
SW	33273	32637	27600	-17.0%
SE	70361	74419	63138	-10.3%
E&W	299546	306743	264783	-11.6%

Crown Copyright (Source 4)

The chart below presents information on the number of final quarter house sales in EHOD between 1998 and 2007. This reveals that the number of sales in Q4 2007 are now nearly in line with those reported in Q4 2004.

Final-quarter house sales in EHOD, 1998-2007



Crown Copyright (Source 4)

House Prices – End of Year Review

The following tables present annual information on house prices covering the years 2001 to 2007 inclusive. Average price in EHOD have increased from £115,000 in 2001 to £235,000 in 2007 (+104.3%). In 2001 average house prices in EHOD were £3,000 lower than the South West average, and £4,000 lower than the national average. However, in 2007, average prices were £5,000 above the South West average and £15,000 above the England and Wales average.

Annual average house prices – 2001 to 2007 (£,000)

Area	01	02	03	04	05	06	07
Exeter	100	128	154	179	182	197	208
E. Devon	130	162	194	223	226	241	262
M. Devon	114	141	167	194	196	207	224
T' bridge	113	141	170	196	208	216	234
EHOD	115	145	173	201	205	217	235
Devon	106	131	157	184	192	203	222
SW	118	144	170	192	199	211	230
SE	150	176	199	218	228	242	262
E&W	119	138	156	179	189	204	220

Crown Copyright (Source 4)

The next table displays information on end-of-year house prices by type in EHOD over the last five years. This reveals that all house types have risen swiftly. Average detached house prices are £343,000 in 2007 (+61.8%), with semi-detached, terraced houses and flats/maisonettes averaging £217,000 (+70.9%), £187,000 (+68.5%) and £162,000 (+62.0%) respectively.

EHOD annual average house prices by type– 2002 to 2007 (£,000)

Area	02	03	04	05	06	07
Detached	212	254	289	302	313	343
Semi	127	157	182	190	199	217
Terraced	111	138	159	165	173	187
Flat	100	116	133	134	148	162

Crown Copyright (Source 4)

The table below highlights that growth in house prices in EHOD over the last five years has roughly followed the South West and England and Wales averages. However, since 2004/05, growth has stood a little behind local, regional and national averages.

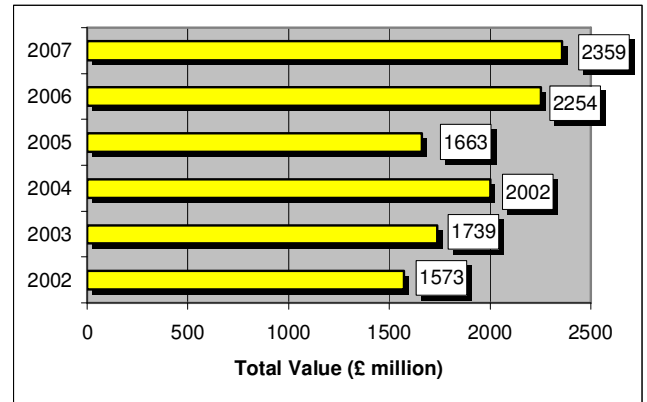
Annual changes in house prices – 2002 to 2007

Area	02/03	03/04	04/05	05/06	06/07
Exeter	20.3%	16.4%	1.4%	8.3%	5.9%
E. Devon	19.5%	15.0%	1.2%	6.5%	8.8%
M. Devon	18.1%	16.0%	1.3%	5.2%	8.3%
T'bridge	20.5%	15.7%	5.9%	4.0%	8.3%
EHOD	19.7%	15.9%	2.1%	5.9%	8.2%
Devon	19.7%	17.2%	4.5%	6.0%	9.3%
SW	17.6%	13.1%	3.6%	6.0%	9.1%
SE	13.5%	9.2%	4.8%	6.3%	8.3%
E&W	13.4%	14.3%	6.0%	7.6%	8.1%

Crown Copyright (Source 4)

The total value of property sold in EHOD has increased significantly compared with five years ago, witnessing the highest total value with over £2.3 billion. This shows a moderate growth since 2006 despite a decline on properties sold. Even coupled with a fall of nearly 7.5% in the number of house sales between 2002 and 2007 (10,852 to 10,036), the rise in property values has meant that the total value of houses sold rose from over £1.5 billion in 2002 to over £2.3 billion in 2007.

Total value of residential property sold in EHOD– 2002 to 2007



Crown Copyright (Source 4)

**Annual business Inquiry 2006**

A summary of key information from the latest available Annual Business Inquiry is provided below. The table below displays the spatial distribution of employees and change over time between 2000 and 2006. This reveals that there are over 194,000 employee jobs in EHOD, an increase of almost 29,400 on 2000. The largest increase was seen in Exeter with around 29% growth over the period, almost 7 times faster than the national average. The growth in the number of employee jobs in EHOD between 2000 and 2006 was above 4 times the national average, and was also well above local and regional averages.

Employee jobs – 2000 to 2006

Area	2000	2006	Change
Exeter	68,126	88,114	29.3%
East Devon	37,879	40,591	7.2%
Mid Devon	20,866	24,678	18.3%
T'bridge	37,753	40,639	7.6%
EHOD	164,625	194,022	17.9%
Devon	397,771	454,957	14.4%
SW	2,038,128	2,211,147	8.8%
SE	3,663,484	3,668,657	0.1%
E&W	22,980,347	23,950,036	4.2%

Crown Copyright (Source 2)

The following table highlights the percentage of employee jobs by employee status (full and part-time jobs). A higher proportion of EHOD employees are part time compared to regional and national averages.

Employment by status – 2006

Area	FT Male	FT Female	PT Male	PT Female
Exeter	38.8%	24.2%	9.4%	27.6%
East Devon	37.1%	22.5%	9.5%	30.9%
Mid Devon	42.4%	21.8%	8.9%	26.9%
Teignbridge	39.1%	22.0%	9.3%	29.6%
EHOD	38.9%	23.2%	9.3%	28.6%
Devon	38.2%	24.1%	9.1%	28.6%
SW	40.2%	24.5%	8.3%	27.0%
SE	42.4%	26.9%	7.9%	22.8%
E&W	42.7%	26.3%	7.7%	23.3%

Crown Copyright (Source 2)

The next table illustrates data on employment in EHOD by industry. Almost a third of jobs are in the public sector and over a quarter in distribution, hotels and restaurants. In comparison to England and Wales, a lower proportion of jobs in EHOD were located in manufacturing and banking, finance & insurance, with a higher proportion of jobs in all other sectors. That said, within Exeter, the banking, finance and insurance sectors account for 18.5% of the workforce. There has been an increase in the number of construction and most service sector industries in EHOD since 2000, along with a fall in the number of jobs in manufacturing and agriculture/fishing.

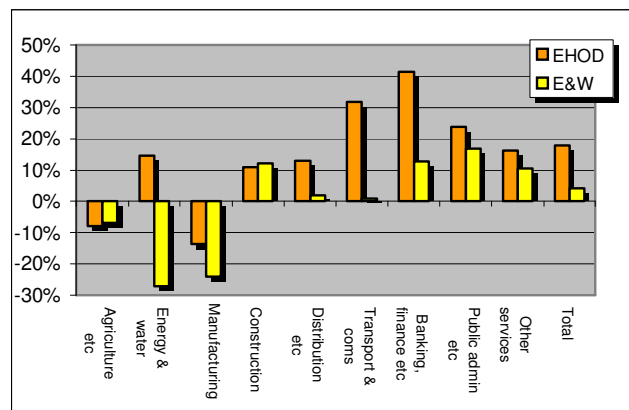
Strong growth has been seen in banking (+41.5%), transport/communication (+31.8%), and public administration (+23.8%).

Employment by Broad Industry group – 2006

	EHOD No (%)	Change 00-06	E&W %
Agriculture/fishing	2,703 (1.4)	-231	0.8
Energy and water	2,285 (1.2)	+290	0.5
Manufacturing	15,265 (7.9)	-2,411	11.0
Construction	10,333 (5.3)	+1,018	4.7
Distribution, hotels & restaurants	48,974 (25.2)	+5,677	23.6
Transport/comms.	11,796 (6.1)	+2,845	6.0
Banking, finance and insurance etc.	29,481 (15.2)	+8,649	21.5
Public admin, education & health	63,180 (32.6)	+12,162	26.6
Other services	10,006(5.2)	+1,400	5.3
Total	194,022	+29,397	-

Crown Copyright (Source 2)

Percentage change by Sector, 2000 to 2006



Crown Copyright (Source 2)

The next table presents the proportion of jobs in knowledge-based industries, which include high-tech manufacturing and knowledge-intensive services, such as research, computing and telecommunications. This reveals that the proportion of jobs in these industries in EHOD is below regional and England and Wales averages, with particularly low levels in Teignbridge.

East Devon has experienced a significant rise on last year figures (+7%) whereas Mid Devon figures seem to have slightly reduced.

Exeter remains the driving force behind knowledge-based businesses in the sub-region and has a rate above the South West average. A little less than half of employment in these industries in Devon is concentrated in EHOD, illustrating the strength of this economic sub-region. Planned growth of these types of employers will be facilitated in part following the recent purchase of land for a Science Park, east of Exeter.

Number of Jobs in the knowledge based industries (KBI), 2005 and 2006.

Area	2005 No of Jobs	2005 % KBI Jobs	2006 No of Jobs	2006 % KBI Jobs
Exeter	10,870	12.8%	11,060	12.6%
E Devon	2,830	7.0%	3,030	7.5%
M Devon	1,650	6.8%	1,550	6.3%
T'bridge	2,250	5.6%	2,340	5.8%
EHOD	17,610	9.2%	17,990	9.3%
Devon	37,250	8.3%	37,310	8.2%
SW	261,850	11.8%	264,990	12.0%
SE	567,410	15.1%	592,760	16.2%
E&W	3,098,630	12.9%	3,185,949	13.3%

Copyright (Source 2)

The next table reveals the growth in the number of businesses in all areas since 1998. In all EHOD areas, growth has exceeded local, regional and England and Wales averages. Around 18,990 businesses are located in EHOD. The strongest growth in the number of businesses in EHOD was seen in Teignbridge (24.0%) and East Devon (23.2%).

**Business numbers– 1998 to 2006**

Area	1998	2006	Change
Exeter	4,080	5,010	22.8%
East Devon	4,390	5,410	23.2%
Mid Devon	2,650	3,230	22.0%
Teignbridge	4,310	5,340	24.0%
EHOD	15,430	18,990	23.1%
Devon	36,460	43,980	20.6%
SW	182,050	215,130	18.2%
SE	323,720	379,670	17.3%
E&W	1,899,000	2,174,790	14.5%

Crown Copyright (Source 2)

The table below displays the proportion of businesses by size band. This reveals that the vast majority of businesses in EHOD have 10 or fewer employees. Within EHOD, Exeter has a larger proportion of medium to large business compared with the England and Wales average, whereas the neighbouring areas have a higher proportion of small businesses.

**Business by size band– 2006**

Area	1-10	11-49	50-199	200+
Exeter	77.9%	16.5%	4.7%	1.0%
East Devon	87.1%	11.1%	1.6%	0.3%
Mid Devon	88.0%	10.1%	1.5%	0.4%
Teignbridge	86.2%	11.4%	2.2%	0.2%
EHOD	84.5%	12.4%	2.6%	0.5%
Devon	84.3%	12.6%	2.6%	0.5%
SW	84.7%	12.2%	2.6%	0.6%
SE	86.1%	10.8%	2.5%	0.5%
E&W	84.5%	12.0%	2.8%	0.7%

Crown Copyright (Source 2)

**Indices of Deprivation 2007**

The Communities and Local Government website recently released the 2007 Indices of Multiple Deprivation, which combine a number of indicators to assess relative deprivation across economic, social and housing issues. The results are converted into a single deprivation score for each small area in England, known as lower level Super Output Areas (SOAs); as data at county, district or ward level often masks the picture. Each SOA covers around 600 households. The 2007 Indices indicators are: income, employment, health, education, barriers to housing and services, crime and living environment; and two supplementary ones on income deprivation affecting children and older people.

Out of the 457 SOAs in Devon (excluding Plymouth and Torbay) 21 are among the most deprived 20% in England; of these 14 are located within EHOD (11 in Exeter and 1 in Mid Devon and 2 in Teignbridge).

For specific information on the ‘Geography of Deprivation in Exeter’, a [link](#) to this document is provided at the end of this report.

The following 4 tables list the ‘10 worst’ pockets of deprivation among the 282 SOAs located in EHOD, for the overall index as well as including a particular focus on income, employment and education indices.

The table below shows the overall deprivation index. The national percentile reveals the percentage of SOAs in England above the area listed. This reveals that seven of the ‘10 worst’ areas are in Exeter, with a particular concentration in Priory and Whipton Barton wards. Three non-Exeter SOAs also feature in the ‘10 worst’ (two in Teignbridge and one in Mid Devon).

**EHOD Index of Multiple Deprivation – worst 10**

SOA name	Ward/ District	National Percentile
E01019995	Newtown, Exeter	7.11%
E01020015	Priory, Exeter	8.04%
E01020014	Priory, Exeter	9.89%
E01020016	St David’s, Exeter	11.23%
E01019990	Mincinglake, Exeter	12.02%
E01020039	Whipton Barton, Exeter	14.81%
E01020067	Lowman, Mid Devon	14.98%
E01020272	Teignmouth West, T’bridge	16.26%
E01020211	Buckland -Milber, T’bridge	17.15%
E01020037	Whipton Barton, Exeter	17.18%

Crown Copyright (Source 8)

The table below presents the ‘10 worst’ pockets of **income deprivation** among the 282 SOAs located in EHOD with the percentage of the population who are income deprived. Teignbridge and Exeter both figure prominently, with only two SOAs elsewhere (one in Tiverton, one in Exmouth). Around a third of the population is income deprived in two SOAs (around Hospital and Mill Lane area in Teignmouth and Burnthouse Lane-Trees in Exeter).

EHOD Income Deprivation – worst 10

SOA name	Ward/ District	Rate
E01020272	Teignmouth West, T’bridge	33.2%
E01020015	Priory, Exeter	32.9%
E01019995	Newtown, Exeter	28.7%
E01020067	Lowman, Mid Devon	28.2%
E01020216	Bushell, T’bridge	27.8%
E01020010	Priory, Exeter	27.7%
E01019914	Exmouth Littleham, E.Devon	26.9%
E01020211	Buckland-Milber, T’bridge	26.5%
E01020039	Whipton Barton, Exeter	25.2%
E01020212	Buckland-Milber, T’bridge	24.8%

Crown Copyright (Source 8)

The following table displays the ‘10 worst’ pockets of **employment deprivation** (involuntary exclusion from employment) among the 282 SOAs located in EHOD. Four Exeter SOAs, four Teignbridge SOAs, one East Devon SOA and one Mid Devon SOA feature in this list, with the greatest intensity in the centre of Exeter (Newtown and St David’s). Other areas of employment deprivation outside of Exeter are concentrated in Dawlish, Teignmouth, Exmouth and Tiverton. There were just two SOAs with more than a fifth of working age adults affected by employment deprivation, both located in Exeter.

EHOD Employment Deprivation – worst 10

SOA name	Ward/ District	Rate
E01019995	Newtown, Exeter	24.7%
E01020016	St David’s, Exeter	20.1%
E01020228	Dawlish Central & NE, T’brg	18.6%
E01020264	Teignmouth Central, T’brg	17.1%
E01020018	St David’s, Exeter	17.1%
E01019914	Exmouth Littleham, E. Devon	16.8%
E01020015	Priory, Exeter	16.7%
E01020269	Teignmouth East, Teignbridge	15.9%
E01020229	Dawlish Central & NE, T’brg	15.4%
E01020067	Lowman, Mid Devon	15.3%

Crown Copyright (Source 8)

The next table presents the ‘10 worst’ pockets of **education, skills and training deprivation** among the 282 SOAs located in EHOD. It covers lack of education skills and training of both the child and adult population. The national percentile reveals the percentage of SOAs in England more deprived than the area listed. This reveals that six of these 10 SOAs are in Exeter, with a particular concentration in Priory ward. Four non-Exeter SOAs also feature (two in Teignbridge and two in Mid Devon), affecting the urban centres of Newton Abbot and Tiverton.

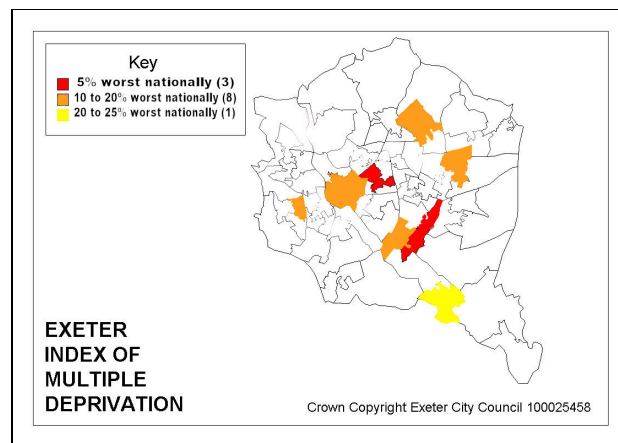
EHOD Education, Skills and Training Deprivation – worst 10

SOA name	Ward/ District	National Percentile
E01020015	Priory, Exeter	0.96%
E01020067	Lowman, Mid Devon	1.25%
E01020014	Priory, Exeter	1.41%
E01020037	Whipton Barton, Exeter	4.47%
E01019990	Mincinglake, Exeter	4.57%
E01020010	Priory, Exeter	4.93%
E01020212	Buckland-Milber, T’bridge	5.45%
E01020211	Buckland-Milber, T’bridge	6.14%
E01020039	Whipton Barton, Exeter	7.14%
E01020053	Cranmore, Mid Devon	7.52%

Crown Copyright (Source 8)

The following map presents the spatial distribution of overall deprivation within Exeter. The strongest pockets of deprivation are in the city centre and the ward of Priory, with lower intensity visible in Cowick, St David’s, Mincinglake and Whipton.

Exeter – Index of Multiple Deprivation 2007



Crown Copyright (Source 8)

## 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 proportion of young people within the resident populations of the 'top 10 wards' in EHOD, with 6 wards having more than a fifth of their population under 15 years of age. In absolute numbers, Exwick 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	1,319	22.6%
Bradninch	Mid Devon	437	21.7%
Priory	Exeter	1,963	21.1%
Mincinglake	Exeter	1,187	20.2%
Ex. Withycombe	East Devon	1,483	20.1%
Teignmouth W.	Teignbridge	1,020	20.0%
Exwick	Exeter	1,830	19.6%
Halberton	Mid Devon	380	19.6%
Lower Culm	Mid Devon	1,069	19.2%
King' ton East	Teignbridge	1,121	19.1%

Crown Copyright (Source 9)

The following table displays the working age population in proportion to the number of residents in the top 10 wards in EHOD. 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	5,670	85.9%
St James	Exeter	5,614	81.6%
St David's	Exeter	4,210	77.4%
Polsloe	Exeter	4,881	76.6%
Newtown	Exeter	4,146	75.4%
St Thomas	Exeter	4,456	69.3%
Exwick	Exeter	6,434	68.8%
Exmouth Town	East Devon	4,500	68.1%
St Loyes	Exeter	3,229	65.9%
Pennsylvania	Exeter	3,629	65.8%

Crown Copyright (Source 9)

\*Working age: Males 16-64 and Females 16-59

The following table displays the retirement age population in proportion to the number of residents in the top 10 wards in EHOD. 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 Retired*	%
Sidmouth Town	East Devon	2,634	50.6%
Budleigh	East Devon	2,532	44.1%
Seaton	East Devon	3,052	42.7%
Sidmouth Rural	East Devon	842	39.1%
Bishopsteignton	Teignbridge	941	38.1%
Teignmouth E.	Teignbridge	1,755	37.6%
Ex.Littleham	East Devon	2,591	37.6%
Sidm'th Sidford	East Devon	2,305	37.4%
Newbridges	East Devon	837	35.4%
Coly Valley	East Devon	1,533	35.0%

Crown Copyright (Source 9)

\*Retired: Males 65+ and Females 60+.

## Chamber of Commerce Quarterly Survey Results

The last finding from the Exeter Chamber of Commerce quarterly business survey are provided below.

The following table reveals that nearly half of respondents reported increases in sales while only a fifth reported a downturn in margins.

Forecasts for the next quarter on the number of employees show that 43% plan to recruit more staff whilst half of respondents expect it to remain the same and a final 7% expect a downturn. Fewer businesses declared higher sales than the previous quarter but margins are higher than the same period in March 2007.

### Exeter Chamber of Commerce survey – sales, margins & employees (March 2008)

Indicator	Up	Same	Down
Sales <sup>1</sup>	49%	30%	21%
Margins <sup>1</sup>	22%	58%	20%
Employees <sup>1</sup>	29%	60%	11%
Employees <sup>2</sup>	43%	50%	7%

Source: Exeter Chamber of Commerce, 2008

1 – Change on last quarter, 2 – Forecast for next quarter

Less than a third of respondents had not invested in their business over the last quarter while 71% were planning to make a new or continued investment in their business over the next quarter. This outlook reveals a more positive trend in the number of respondents about to invest in their business compared with all 2007 surveys.

The survey also suggests that business confidence, after a significant boost in June 2007, has slipped back slightly but remained broadly at the level of last year, with 34% of respondents reporting high confidence, 64% reporting medium confidence and 2% of respondents reporting low confidence. This is matched almost exactly with 32%, 65% and 3% respectively a year ago.

The next survey is due out in June 2008.

To access results before the next economic trends report and view data over the last year, visit:  
<http://www.exeterchamber.co.uk/survey.html>

## News and Information

The South West Observatory has recently released an online update of the State of the South West; for a wealth of information on the region, visit:  
<http://www.swo.org.uk/SOTSW2008/index.html>

Devon Primary Care Trust has just published the Annual Public Report for 2007/8. This document highlights key public health issues in Devon, sets out key priorities and actions and provides a wealth of information, including Mini Health Profiles for the Exeter area and the towns of Devon  
<http://www.devonpct.nhs.uk/default.asp?pg=150>

More detailed local profiles, created to support the Joint Strategic Review of Health and Social Care in Devon can be found here:  
<http://www.devon.gov.uk/JSNAprofiles>

## 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](http://www.exeter.gov.uk/property)

### **Exeter City Council Statistics**

For an extensive coverage of the Indices of Multiple Deprivation 2007 and a report on 'The Geography of Deprivation in Exeter', follow this link:  
[www.exeter.gov.uk/deprivation](http://www.exeter.gov.uk/deprivation)

For facts and figures from a variety of sources for Exeter, follow this link:  
[www.exeter.gov.uk/statistics](http://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](http://www.exeter.gov.uk/media/pdf/l/r/Relocation_Brochure.pdf)

## Sources

### Sources:

Unless otherwise stated: 1 – ONS Mid-Year Population Estimates 2006, 2 – ONS Annual Business Inquiry 2006, 3 – ONS Jobs Density Indicator 2005; 4 – Land Registry Sep-Dec 2007, 5 – ONS Claimant Count March 2008, 6 – ONS Annual Survey of Hours and Earnings 2007; 7 – ONS Annual Population Survey Jul 06-Jun 2007 & Jan-Dec 06 for Education data; 8 – Communities & Neighbourhoods IMD 2007; 9 – Census Area Statistics (CAS) ward population estimates, 2005 (experimental). All Crown Copyright. 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.

### IMD 2007 Definition:

– ‘**Income Deprived**’, relates to the proportion of the population living in low-income families, which are those reliant on means tested benefits. The domain score is therefore the proportion of the population living in low-income families.

– ‘**Employment Deprived**’, defined as involuntary exclusion of the working age population from work and includes elements of the ‘hidden unemployed’ such as those out of work due to illness and disability.

– ‘**Education, Skills and Training**’, consists of two sub-domains: one relating to the lack of educational attainment among children and young people and one relating to lack of qualifications in terms of skills among the working age population.

This report is produced quarterly with the next edition due around August 2008 which is likely to include new Annual Population Survey data and Department of Work and Pensions data.

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

Matthieu Renaud, Economy & Tourism Unit, Exeter City Council, EX1 1JJ  
Tel: 01392 265597  
Fax: 01392 265625  
E-mail: [matthieu.renaud@exeter.gov.uk](mailto:matthieu.renaud@exeter.gov.uk)