



ENVIRONMENTAL STATEMENT
VOLUME 1
CHAPTER 5 – SOCIO-ECONOMICS

5. SOCIO-ECONOMICS

5.1. INTRODUCTION

- 5.1.1. This Chapter reports the likely significant socio-economic effects arising from the Proposed Development. This assessment considers several potential effects, including the operational employment of the scheme, the anticipated geographic distribution of employees, visitor expenditure, and contribution to leisure.
- 5.1.2. The Chapter describes the assessment methodology, the baseline conditions at the Site and in the surrounding area, any primary and tertiary mitigation adopted for the purposes of the assessment, a summary of the likely significant effects, the further mitigation measures required to prevent, reduce or offset any significant negative effects, and the likely residual effects and any required monitoring after these measures have been employed.
- 5.1.3. This Chapter (and its associated figures) is intended to be read as part of the wider ES, with particular reference to **Chapter 4: The Proposed Development**, and the Construction Management Plan submitted with the planning application.

5.2. LEGISLATION, POLICY AND GUIDANCE

LEGISLATIVE FRAMEWORK

- 5.2.1. There are no legislative requirements which exist in relation to the assessment of socio-economic effects, and therefore the assessment is guided by the Government's planning policy and guidance. Planning policy at the national, regional, and local level (and its relevance to sustainable design and environmental assessment) is outlined in **Chapter 1: Introduction**. A summary of the planning policy relevant to socio-economics and the Proposed Development is provided below. Please refer to **Appendix 5.1** for the detailed review of policy.

PLANNING POLICY

National Planning Policy

National Planning Policy Framework (2019)

- 5.2.2. The NPPF (**Ref. 5.1**) sets out the Government's economic, environmental and social planning policies for England.
- *"At the heart of the NPPF is a presumption in favour of sustainable development"* (Paragraph 11).
 - Plans should provide *"a positive vision for the future of each area; a framework for addressing housing needs and other economic, social and environmental priorities; and a platform for local people to shape their surroundings"* (Paragraph 15).
 - Planning policies should *"set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth"* (Chapter 6, Paragraph 81a).
 - Planning policy *"should aim to achieve healthy, inclusive and safe places"* (Chapter 8).
 - Much of the guidance is relevant to socio-economics, including the need for local authorities to:
 - *"Plan positively for the provision and use of shared spaces, community facilities (such as local shops, meeting places, sports venues, open space, cultural buildings, public houses and places of worship) and other local services"* (Paragraph 92a); and

- “Ensure an integrated approach to considering the location of housing, economic uses and community facilities and services” (Paragraph 92e).

Regional Planning Policy

Oxfordshire Local Industrial Strategy (Ref. 5.3)

- 5.2.3. The strategy outlines a vision for “*People*”, to “*Develop a more responsive skills ecosystem creating better opportunities for all*”. To deliver this, the strategy prioritises (see pages 52 and 53 of the *Oxford Shire Local Industrial Strategy*):
- Getting the fundamentals right – building a skills system that better responds to local demand; and
 - Making the most of all our people – with longer and more flexible careers for older workers, and improved access to emerging jobs for younger people.
- 5.2.4. Where some key points are:
- To maximise use of the Apprenticeship Levy;
 - Create pathways and social mobility for young people; and
 - Support reskilling through OxLife (a programme to reskill and upskill Oxfordshire workers).
- 5.2.5. The Skills Priority Statement refers to a Social Contract where, amongst other things, Oxfordshire “*will work with the Careers and Enterprise Company, local colleges and Oxfordshire County Council to improve social mobility for young people by ensuring they will have greater access to career pathways within Oxfordshire, to promote opportunities to access coaching and mentoring with world-leading businesses across the ecosystem. This will [...] enable skills development to align to business need and promote more tailored skills that will release pressure on the tight labour market.*”

Oxford-Cambridge Arc

- 5.2.6. Oxfordshire, Cambridgeshire and Peterborough, South East Midlands and Buckinghamshire offer four strategies which cover the Arc. The strategic objectives of the Arc include “*bringing employers and skills providers together to understand the current and future skills needs, and planning provision to meet them.*”
- 5.2.7. Across the Arc, through Skills Advisory Panels, the LEPs will work with government to:
- Work with local employers to increase apprenticeship uptake across the Arc, supporting employers to maximise their Apprenticeship Levy contributions and drive social mobility
 - ... bring together training providers from across the Arc, with a view to establishing an Arc-wide skills marketplace [...] connecting businesses with regional and national skills providers and people with targeted support including apprenticeships, STEM skills, T levels, technical and degree apprenticeships.

Local Planning Policy

The Cherwell Local Plan 2011-2031 (Ref. 5.4)

- 5.2.8. Cherwell District aims to:
- “*...develop a sustainable economy that is vibrant and diverse with good transport links and sound infrastructure, supported by excellent educational facilities. Our economy will grow to provide*



*more **diverse employment** for our increasing population and **reduce the need for our residents to travel outside the District for work.***

- 5.2.9. The Cherwell Economic Development Strategy (2011-2016) (**Ref. 5.5**) aimed to create ‘economic resilience’, and identified key challenges faced by the local area, including improving resident qualifications and education levels and raising the weekly wage to be on par with the South East. These informed the following strategic objectives within the Local Plan:
- **“SO 1 To facilitate economic growth and employment and a more diverse local economy with an emphasis on attracting and developing higher technology industries”.**
 - **“SO 3 To help disadvantaged areas, support an increase in skills and innovation, improve the built environment and make Cherwell more attractive to business by supporting regeneration.”**
 - **“SO 5 To encourage sustainable tourism.”**
- 5.2.10. Policies for developing a sustainable local economy relevant to the Proposed Development include:
- **Policy SLE 1: Employment Development;** and
 - **Policy SLE 3: Supporting Tourism Growth.** The Council will support proposals for new or improved tourist facilities in sustainable locations, where they accord with other policies in the plan, to increase overnight stays and visitor numbers within the District.

GUIDANCE

- 5.2.11. The following guidance documents have been used during the preparation of this Chapter:
- Homes and Community Agency (HCA) (2015) Employment Density Guide 3rd Edition (**Ref. 5.6**); and
 - English Partnerships (2014) Additionality Guide 4th Edition (**Ref. 5.7**).

5.3. CONSULTATION, SCOPE, METHODOLOGY AND SIGNIFICANCE CRITERIA

CONSULTATION UNDERTAKEN TO DATE

- 5.3.1. Public exhibitions were held in June and September 2019 in Bicester. The key socio-economic impacts were presented at these exhibitions and feedback from this has been incorporated into this assessment. The key points of feedback were:
- Loss of golf club facilities – this was raised by golf club members, although when asked about alternatives they noted that there were several other golf club options in the vicinity. The changing nature of golf and falling membership levels is considered in this assessment;
 - Need for local jobs – respondents noted that unemployment is low in Cherwell and questioned whether there is a need for jobs at the Proposed Development. This comment is acknowledged and is assessed in the geographic distribution of employment effects below; and
 - Day passes – local respondents queried whether there would be day passes as they would like to bring their children / grandchildren but would not pay to stay overnight as they live locally.

SCOPE OF THE ASSESSMENT

- 5.3.2. An EIA Scoping Report was submitted to Cherwell District Council in June 2019, as presented in **Appendix 2.1**. Further information can be found in **Chapter 2: Approach to the Assessment**.

5.3.3. This section provides an update on the scope of the assessment and re-iterates the evidence base for insignificant effects following further iterative assessment since submission of the EIA Scoping Report in June 2019 and receipt of Cherwell District Council's EIA Scoping Opinion in August 2019 (see **Appendix 2.2**), which the assessment presented herein has taken account of.

Insignificant Effects

5.3.4. The elements shown in **Table 5-1** are not considered to give rise to likely significant effects as a result of the Proposed Development and have therefore not been considered within the ES.

Table 5-1 - Summary of Insignificant Effects

| Element scoped out | Justification |
|---------------------------------|--|
| Construction employment | Employment generated during the Construction Phase would be temporary in nature. When coupled with the fact that the construction workforce tends to be one of the most fluid sectors, travelling to work where construction is occurring, the impact of increased demand for construction workers is not considered likely to have a significant effect and is therefore scoped out. |
| Construction worker expenditure | The temporary expenditure and revenue generated by workers at the Proposed Development during the Construction Phase is scoped out of the assessment because any additional expenditure in the local area through construction workers would not be significant relative to current levels of expenditure in the local area. |
| Operational worker expenditure | The expenditure and revenue generated by workers at the Proposed Development during the Operational Phase is scoped out of the assessment because any additional expenditure in the local area through workers at the Proposed Development would not be significant relative to the expenditure in the local area. |
| Crime and deprivation | Cherwell already performs very well in relative deprivation scores, particularly in the sub-domains most likely to be affected by the Proposed Development - income, employment and living environment. The Proposed Development's anticipated small (but positive) impact on local deprivation and crime levels is therefore anticipated to have an insignificant effect, given the low levels of existing deprivation in the local area. |
| Local healthcare provision | As the Proposed Development does not have a residential element, and local GP services are not constrained, it is anticipated that the impact of the additional workers and visitors in the local area will have a negligible effect on local health care provision and hence this effect is scoped out. |
| Open space | The Proposed Development is not anticipated to have a significant impact on open space provision in the local area. It will result in a loss of golf course space but this is privately owned and not open to the public. |



ELEMENTS SCOPED INTO THE ASSESSMENT

Potentially Significant Effects

Construction Phase

- 5.3.5. There are no Construction Phase elements that are considered to have the potential to give rise to likely significant effects during construction of the Proposed Development.

Operation Phase

- 5.3.6. The following elements are considered to have the potential to give rise to likely significant effects during operation of the Proposed Development and have therefore been considered within the ES:
- Operational employment (direct, indirect and induced);
 - Geographical distribution of employment opportunities;
 - Visitor expenditure;
 - Contribution to leisure provision; and
 - Employee training and college partnerships.

EXTENT OF THE STUDY AREA

- 5.3.7. There are several geographic areas used to assess the baseline conditions for the Proposed Development. These are set out in **Table 5-2**, and the basis for their use is explained in more detail below.

Table 5-2 - Socio-economic Effects by Geographical Scale

| Geographical scale | Geographical area |
|--------------------|--|
| Local area | Lower Super Output Area (LSOA) Cherwell 016A |
| District | Cherwell District |
| Regional | Oxfordshire |
| National | Great Britain (GB) |

- 5.3.8. The economic impact of the Proposed Development is considered relative to the Oxfordshire region, as this represents the principal labour market catchment area. The site is likely to be served by labour from all parts of Oxfordshire.
- 5.3.9. Error! Reference source not found. **Table 5-3** presents the different components of the assessment and the geographical scale at which they have been assessed. Catchments identified are proportionate to describe the likely significant socio-economic effects and are based on published guidance and best practice.

Table 5-3 – Socio-economic Effects by Geographical Scale

| Effect | Geographical area of effect | Rationale for area of effect |
|---|-----------------------------|---|
| Employment generation during the operational phase (direct, indirect and induced effects) | Oxfordshire | Census 2011 Origin and Destination Statistics and Travel to Work areas (2011) |

| | | |
|---|-------------|--|
| Geographical distribution of operational employment opportunities | Cherwell | Census 2011 Origin and Destination Statistics – assessing the local benefits of these jobs and whether they are needed |
| Additional visitor spending | Oxfordshire | Office for National Statistics Region//Experience Oxfordshire (2018) |
| Contribution to leisure | Cherwell | Coldwell Banker Richard Ellis (CBRE) research focuses on Cherwell level impacts |
| Employee training and college partnerships | Cherwell | Office for National Statistics Annual Population Survey |

METHOD OF BASELINE DATA COLLATION

Desk Study

- 5.3.10. A desk-based baseline data collection exercise has been undertaken which included a review of available information to determine the baseline conditions in the relevant geographical areas of effect. Existing baseline socio-economic conditions have been established through interpretation of nationally recognised research, data and survey information. The most recent data published is used throughout this assessment, normally dated either 2017, 2018 or 2019. Where data from these years has not been available the next best alternative has been used (i.e. the most up to date). The sources are referenced throughout the chapter and the data is sourced from the Office of National Statistics (ONS) where possible.
- 5.3.11. The following data sources have been reviewed:
- ONS NOMIS (**Ref. 5.9**);
 - Economic Impact of Tourism in Oxfordshire 2017 (**Ref. 5.10**); and
 - CBRE (2019), Desk Based Golf Needs Study (**Ref. 5.8**).
 - Cherwell District Council (2018) Open Space, Sport and Recreation Assessment and Strategies. Part 2: Sports Facilities Strategy Executive Summary, August 2018 (**Ref. 5.14**).

Site Visit

- 5.3.12. No site visit was required for the purpose of this assessment.

ASSESSMENT METHODOLOGY

Operational Employment Generation

Gross Additional Jobs

- 5.3.13. The HCA Employment Densities Guide is the widely recognised framework for identifying and estimating employment generation effects of schemes (**Ref. 5.6**). The Proposed Development is unique in its nature and therefore the employment densities may not be appropriate for assessing the employment effects of the proposals for all elements. This is particularly true for the leisure



space in the Proposed Development – other uses, such as retail and food and beverage, have appropriate employment densities in the guidance.

- 5.3.14. This Chapter therefore uses an incremental approach to estimate employment effects. It first estimates the employment effects using the densities guide, before drawing on industry benchmarks and business planning information from the Applicant. The guidance notes the following, providing support for this approach:

“The diversity of the cultural attraction sector indicates that providing a single density is impossible, and even the range provided requires significant levels of specific understanding to ensure employment estimations are accurate.”

- 5.3.15. Some of the uses had clear assignments to the HCA guide such as Family Entertainment Centre (FEC) food and beverage (assigned to restaurants and cafes) others, particularly the Connector Zone and FEC recreation, contained elements that could be considered for a variety of uses: Magic Goblin encounters (assigned amusement & entertainment centres), Ben and Jerry’s outlet (assigned food and beverage) or Magic Quest (assigned both amusement and retail). In order to account for this uncertainty, the assessment presents best and worst case scenarios based on the ranges presented in the densities guide, before giving our view, based on the Applicant’s available evidence and our own expert judgement, of the most realistic employment generation (**Table 5-4**).

Table 5-4 - Floorspace of the Proposed Development and Range of Floorspace Use Assumptions

| | Gross (sqm) | Net (sqm) | Assumption and employment density used in estimation | |
|----------------------|-------------|-----------|--|---|
| | | | Worst case | Best case |
| Guestrooms & support | 27,250 | n/a | 498 keys: mid-range hotel at 1 full time equivalent (FTE) per 3 keys | |
| Lobby | 1,870 | n/a | All jobs are accounted for in guestrooms & support – the lobby does not support jobs | |
| Connector zone | 970 | 820 | Amusement & entertainment centre jobs (70 mid density NIA) | Restaurant/retail (17.5 mid density NIA) |
| FEC recreation | 2,770 | 2,350 | | |
| FEC food & beverage | 1,000 | 850 | Food and beverage jobs – low density (20 max density NIA) | Food and beverage jobs – high density (15 min density NIA) |
| Meeting | 1,400 | 1,200 | Managed workspace jobs (47 max density NIA) | Office jobs (12 min density NIA) |

| | Gross (sqm) | Net (sqm) | Assumption and employment density used in estimation | |
|-----------|-------------|-----------|--|--|
| | | | Worst case | Best case |
| Waterpark | 8,340 | n/a | Amusement & entertainment centre jobs – low density (100 max density GIA) | Amusement & entertainment centre jobs – high density (70 mid density GIA) |

- 5.3.16. After applying employment densities to this range, it is estimated that the Site would support between 365 and 625 gross FTEs. Based on information provided by the Applicant from their other developments, 46% of workers are estimated to be part time employees, which equates to between 470 and 810 jobs (on the assumption that one part time job is equivalent to 0.5 full time jobs).
- 5.3.17. Based on their industry experience, the Applicant expects the Proposed Development to support a total of 460 FTEs (equivalent to 600 jobs) which is within the HCA estimated range, but at the conservative end. Given the Applicant’s experience at other similar developments and industry knowledge, and the position of their job estimation at the lower end of the range, this estimate has been taken forward for the subsequent analysis.
- 5.3.18. To determine the net operational employment, the net ‘deadweight’ on-site relating to the existing Site is discounted from the gross impact. It is understood that there will be no job losses on the existing Site. Whilst not a direct result of the scheme, the selling of part of the site to the Applicant is therefore likely to result in reinvestment in the remainder of the golf club site so that it is economically more successful in the future, which would in turn support higher numbers of jobs. Based on this, the direct employment generated by the Proposed Development would be entirely additional.
- 5.3.19. Once direct net additional jobs have been determined, displacement, multiplier and visitor spend effects are then taken into account to determine the total net employment. Leakage is applied in the next section to understand how many of the jobs would benefit local residents.

Leakage

- 5.3.20. Leakage measures the extent to which the benefits of a project are realised by parties outside the study area.
- 5.3.21. For the purposes of this assessment, employment leakage has been proxied by the proportion of workers in the Local Area that reside outside of Cherwell (based on 2011 Census commuting patterns). This effect is considered separately to overall employment effects, as ‘geographical distribution of employment’.

Displacement

- 5.3.22. Displacement measures the extent to which the benefits of a project are offset by reduction of output or employment elsewhere.
- 5.3.23. The English Partnerships Additionality Guidance (**Ref. 5.7**) provides guidance on the levels of displacement. Given sufficient labour supply markets at the Oxfordshire level, a low level of



displacement of 25% is considered appropriate, where “*there are expected to be some displacement effects, although only to a limited extent*”.

Multiplier Effects

- 5.3.24. In addition to the direct employment generated by the Proposed Development itself, there will be an increase in local employment arising from further economic activity (jobs, expenditure or income) associated with additional local income and local supplier purchases; the indirect and induced effects of the operational activity. Employment growth will arise locally through services and suppliers to the operations of the Proposed Development (indirect or supply linkage multipliers). Additionally, part of the income of the workers and suppliers will be spent in Oxfordshire, generating further employment (induced or income multipliers).
- 5.3.25. The effects of the multiplier depend on the size of the geographical area that is being considered, the local supply linkages and income leakage from the area. The study of tourism in Oxfordshire by Destination Research (**Ref. 5.10**) reported a regional jobs multiplier of 1.29. The English Partnerships Additionality Guidance (**Ref. 5.7**) provides a guide to the composite multipliers (the combined effect of indirect and induced multiplier effects) which should be applied. In line with this guidance, within the Oxfordshire context a ‘low’ multiplier of 1.3 is considered appropriate, given “*limited local supply linkages and induced or income effects*”. The two multipliers are consistent, hence a multiplier of 1.3 was used.
- 5.3.26. This multiplier incorporates the local income and supplier effects of the employment, but does not capture any induced jobs created as a result of visitor expenditure in the wider area. The local spend on retail and food and beverage by visitors to the Proposed Development is therefore expected to generate additional employment. This is estimated by dividing the total local spend (see visitor expenditure methodology below) by gross value added (GVA) per worker in the retail and food and beverage industries (£42,000) (**Ref. 5.11**). In these industries, 40% of workers are part time, which is applied to the FTE estimate to generate the estimated number of jobs.

Geographical Distribution of Operational Employment

- 5.3.27. The geographic distribution of the operational employment has been estimated based on census (2011) travel to work information. This is an assessment of leakage of employment outside the target area – that is, the proportion of jobs taken by people who live outside the study area. Whilst the employment and skills initiatives – outlined in this assessment – would seek to minimise this leakage (by maximising take up of jobs by local people), this existing rate (64% Cherwell residents - see **Table 5-12**) is used in order to be conservative when assessing net effects.
- 5.3.28. Some consultees queried whether there would be a need for these jobs in Cherwell, evidencing this on the point that unemployment is low in the area. This section therefore not only considers the likely scale of local employment, but also whether there is evidence that there is demand for these jobs.

Visitor Spend and Visitor Spend Effects on Employment

- 5.3.29. Visitor spend was estimated using research by Experience Oxfordshire on the value of tourism in Oxfordshire (**Ref. 5.10**). The research reported that there was £1.8bn of direct tourism expenditure in Oxfordshire in 2017. Of this, £0.7bn was from staying visitors, who spent 42% of their budgets on accommodation and attractions and 43% on eating, drinking and retail, as shown in **Table 5-5**. Visitor expenditure is estimated based on the following assumptions:

- Visitors to the Proposed Development spend the same proportion of their total expenditure on accommodation, shopping, food and drink, and attractions as staying visitors;
- The average room rate at the Proposed Development is 41% of visitors' total spend, which is the total of accommodation and attraction spend for staying visitors in Oxfordshire. This conservatively assumes that all of visitors' expenditure on attractions would be within the Proposed Development. After travel expenditure (which is assumed to be fully absorbed by the transport providers), the remaining 43% would therefore be spent on shopping and food and drink;
- A high proportion of the food and drink and shopping spend would also take place in the Proposed Development. However, there are some opportunities for local retail and food and beverage spend outside the Proposed Development, particularly in Bicester Village. It is conservatively assumed that 25% of total spend on food & drink and shopping is spent outside the Proposed Development in the rest of Oxfordshire; and
- There will be a high proportion of children visiting the Proposed Development and whilst these will support expenditure in Oxfordshire, they will not be expected to do so directly. This analysis therefore only accounts for spending of adult visitors, which, based on likely attendance, is expected to be approximately half of visitors.

Table 5-5 Direct Tourism Expenditure in Oxfordshire 2017

| | Accommodation | Shopping | Food & Drink | Attractions | Travel |
|------------------|---------------|----------|--------------|-------------|--------|
| All visitors | 13% | 23% | 32% | 10% | 22% |
| Day visitors | 0% | 23% | 40% | 10% | 27% |
| Staying visitors | 31% | 22% | 21% | 11% | 15% |

Source: Experience Oxfordshire (2018).

Operational Worker Expenditure

- 5.3.30. A 2005 YouGov Survey¹ found that average daily expenditure of workers in GB was £6 a day. Uplifted for UK earnings growth to 2018, the differential in earnings for Cherwell compared to GB average, and the average differential in earnings in the relevant industries covered by the development, results in an average estimated gross daily worker spend of £5.20 at the Proposed Development.
- 5.3.31. However, since there are limited options for expenditure during working hours near the Site, a conservative 50% leakage factor is applied to the average spend to approximate local spend. It is therefore estimated that the workers would spend an average of £2.60 in the local area each day. To be conservative, it is assumed that 60% of workers would spend the £2.60 per day for 220 working days a year.

¹ Although this study dates back to 2005 it is the most up to date and most frequently used assumption concerning what employees spend in their local area of work. As discussed below, conservative assumptions have been applied when using this figure.



- 5.3.32. Since there is expected to be no job losses as a result of the Proposed Development, spend by employees in the local area is expected to be entirely additional.

Contribution to Leisure Supply

- 5.3.33. The Proposed Development is a unique proposition. It would be the Applicant's first resort in the UK, providing a one of a kind family resort experience with an existing indoor waterpark, other attractions and entertainment offerings and dining options. It is therefore not directly comparable to existing leisure offerings in Cherwell and Oxfordshire, and would be expected to attract new visitors and people from further afield. This section considers the existing leisure provision in Cherwell to provide an indication of types of leisure and leisure needs for the baseline assessment, though it should be noted that the Proposed Development would be a completely different offering. The source for this analysis is the Open Space, Sport and Recreation Assessment and Strategies (2018) undertaken for Cherwell District Council (**Ref. 5.14**).
- 5.3.34. The Proposed Development is considered to be a 'main town centre use' according to the National Planning Policy Framework (NPPF) ². The NPPF requires applications for main town centre uses to be located in centres, then in edge-of-centre locations then out-of-centre locations. When considering edge and out of centre sites, "*preference should be given to accessible sites which are well connected to the Town Centre*". A sequential test is performed defining the preferred location, taking into account the specific operational and business requirements of the Applicant.
- 5.3.35. The sequential assessment considers several sites, agreed with CDC, to understand whether there are any suitable, available and viable sites within or on the edge of a series of town centres.³ Even after demonstrating high flexibility in their requirements, such as increasing the drive time from London and Birmingham beyond the Applicant's identified viable catchment and relaxing the requirement for the required size of the Site, the sequential test found that the Site was considered the preferred location in planning policy terms for new 'main town centre use' floorspace (refer to the Planning Statement Appendix 3 for more detail).
- 5.3.36. The Site is used as part of an 18 hole golf course – as part of the proposals, 9 holes would be reconfigured. This assessment therefore considers the current supply of, and need for, golf courses to understand the potential effects of this. A report from CBRE (**Ref. 5.8**) commissioned by the Applicant is the key source for this assessment. As required by Cherwell District Council, the report justifies the loss of golf space against existing planning policy. This Chapter summarises the key points from that document, but the report should be referred to for more information. The assessment of golf trends also relies on the Open Space, Sport and Recreation Assessment and Strategies.
- 5.3.37. **Ref. 5.16** provides an estimate of the typical indoor water park catchment. This report was used to inform the analysis of the likely catchment of the Proposed development and compare this to the catchment for the existing golf course.
- 5.3.38. The magnitude of leisure effect is assessed on the overall impact on leisure in Cherwell. It weighs up the provision of additional leisure space from the Proposed Development against the loss of open space and concludes on the net effect.

² Ministry of Housing, Communities & Local Government (2019) National Planning Policy Framework.

³ DP9 (2019), Proposed Great Lodge, Chesterton, Bicester. Planning Statement, Appendix 3

Employment Training and College Partnerships

- 5.3.39. The Annual Population Survey provides an estimate of the proportion of Cherwell and Oxfordshire residents with skill levels ranging from no qualifications to degree level qualifications or higher (NVQ4+). This data is presented to provide some context for existing skill levels in the relevant study areas.

SIGNIFICANCE CRITERIA

- 5.3.40. The significance level attributed to each effect has been assessed based on the magnitude of change due to the Proposed Development and the sensitivity of the affected receptor, as well as a number of other factors that are outlined in more detail in **Chapter 2: Approach to the Assessment**. The sensitivity of the affected receptor is assessed on a scale of high, medium, low and negligible (as shown in **Chapter 2: Approach to the Assessment**). In the context of socio-economics, the level of sensitivity depends upon the baseline conditions (i.e. the extent to which unemployment, skills deficit, or social infrastructure issues etc. are present in an area) and thus how many jobs and how much spending or infrastructure is needed in that area. The receptor sensitivity has been assessed on a case-by-case basis, using professional judgement.
- 5.3.41. The assessment of the magnitude of potential impacts has been undertaken based on expert judgement as there are no industry standard criteria relating to the determination of the magnitude of a socio-economic impact. The assessment has aimed to be objective, quantifying the magnitude of impacts wherever possible. Where quantification has not been possible, qualitative assessments have been made and justified. The magnitude of impacts has been classified as high, medium, low or negligible.

EFFECT SIGNIFICANCE

- 5.3.42. In terms of effect nature, effects are defined as either:
- **Beneficial** – advantageous effects on the defined study area;
 - **Adverse** – detrimental effects on the defined study area; or
 - **Neutral** – no effect on the defined study area.
- 5.3.43. The magnitude of each impact and the sensitivity of the receptor affected have then been combined to provide a scale of effect, as set out in **Table 5-6**. For example, an impact of medium magnitude on a highly sensitive receptor would result in an effect that is major in scale.

Table 5-6 – Matrix to Determine Scale of Effect

| | | Sensitivity of Receptor / Receiving Environment to Change | | | |
|---------------------|------------|---|-------------------|-------------------|------------|
| | | High | Medium | Low | Negligible |
| Magnitude of Change | High | Major | Major | Moderate | Negligible |
| | Medium | Major | Moderate | Minor to Moderate | Negligible |
| | Low | Moderate | Minor to Moderate | Minor | Negligible |
| | Negligible | Negligible | Negligible | Negligible | Negligible |

- 5.3.44. As set out in **Chapter 2: Approach to the Assessment**, effects that are classified as **major or moderate** (either beneficial or adverse) are considered to be **significant**. Effects classified as **minor or negligible** are considered to be **not significant**.

5.4. BASELINE CONDITIONS

POPULATION

- 5.4.1. In 2017, there were 150,000 people living in Cherwell, 3,000 of which were in the local area. Overall, Cherwell has seen population growth of 7% since 2007, in line with Oxfordshire (7%) and just below GB (8%). Both Cherwell and Oxfordshire have a lower population density than the GB average. The local area is significantly less dense than the study areas (**Table 5-7**).

Table 5-7 - Population

| | 2007 | 2017 | Total growth | 2017 population density (people/ha) |
|-------------|------------|------------|--------------|-------------------------------------|
| Local area | - | 3,335 | - | 1.3 |
| Cherwell | 138,120 | 147,602 | 7% | 2.5 |
| Oxfordshire | 635,094 | 682,444 | 7% | 2.6 |
| GB | 59,557,392 | 64,169,395 | 8% | 3.1 |

Source: Mid-year population estimates.

- 5.4.2. In 2017, 62% of the Cherwell population was of working age, in line with Oxfordshire and GB (both 63%), and slightly higher than the local area (60%) (**Table 5-8**).

Table 5-8 – Working Age Population

| | 2017 | % of total population |
|-------------|------------|-----------------------|
| Local area | 2,007 | 60% |
| Cherwell | 92,013 | 62% |
| Oxfordshire | 431,024 | 63% |
| GB | 40,368,375 | 63% |

Source: Annual Population Survey.

Economic Activity

- 5.4.3. In 2018, 85% of the Cherwell working-age population were economically active (**Table 5-9**). This was higher than both the Oxfordshire average (83%) and GB average (78%).
- 5.4.4. Of 16 to 64-year olds, 84% of Cherwell residents were in employment versus only 81% in Oxfordshire and 75% in GB. Of those 16 to 64-year olds that were economically active, only 1% were unemployed which was lower than both Oxfordshire (2%) and GB (3%).

Table 5-9 – Economic Activity

| | Cherwell | Oxfordshire | GB |
|--|----------|-------------|------------|
| Economically active (number) | 76,300 | 352,700 | 31,458,500 |
| Economically active (% of people aged 16-64) | 85% | 83% | 78% |
| Employment (number) | 75,200 | 345,000 | 30,116,600 |
| Employment rate (% of people aged 16-64) | 84% | 81% | 75% |
| Unemployment (number) | 1,100 | 7,700 | 1,341,900 |
| Unemployment (% of 16 to 64 year olds who are economically active) | 1% | 2% | 3% |
| Economically inactive who want a job ⁴ | 4,400 | 11,200 | 1,796,000 |
| Economically inactive who want a job (% of economically inactive) | 33% | 16% | 21% |

Source: Annual Population Survey.

Qualifications and Education

5.4.5. In the year 2018, Cherwell had a lower proportion of 16 to 64-year olds with NVQ2+, NVQ3+, NVQ4+ level qualifications and other qualifications than the Oxfordshire average, although they were higher than the national average. It had a higher proportion of 16 to 64-year olds with no qualifications than the Oxfordshire average and had a higher proportion with NVQ1+ than both Oxfordshire and GB (**Figure 5-1** Figure 5-1 – Qualifications).

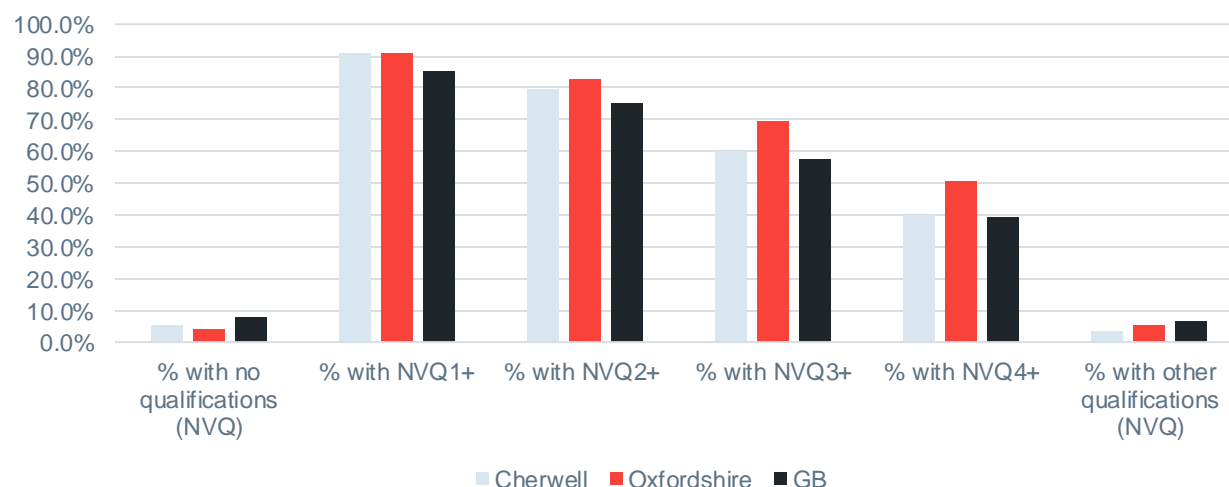


Figure 5-1 – Qualifications

Source: Annual Population Survey.

⁴ Unemployed but economically active individuals are defined as those who are without a job but available to start work in the two weeks following their interview or those who had either looked for work in the four weeks prior to interview or were waiting to start a job they had already obtained. People without a job who do not meet these criteria are classed as economically inactive, yet they may still want a job. For example, they may be a student or temporarily injured.



Employment

- 5.4.6. **Table 5-1** shows that, in 2017, Oxfordshire accommodated the fifth highest number of workers (374,000) of the 19 counties within the South East region, accounting for 9% of total employment (4,239,500) in the region.
- 5.4.7. Total employment in the local area was estimated to be 1,250, equivalent to an employment density of 0.5, significantly below average employment densities in Cherwell (1.3), Oxfordshire (1.4) and GB (1.5). This difference in density is mirrored in the population density figures of the geographies, where the local area has a far lower density than all comparators.

Table 5-10 - Employment and Population (2017)

| | Employment | Employment density (employment/ha) | Population | Population density (people/ha) |
|---------------|------------|------------------------------------|------------|--------------------------------|
| Local area | 1,250 | 0.5 | 3,335 | 1.3 |
| Cherwell | 78,500 | 1.3 | 147,602 | 2.5 |
| Oxfordshire | 374,000 | 1.4 | 682,444 | 2.6 |
| Great Britain | 30,593,000 | 1.5 | 64,169,395 | 3.1 |

Source: Business Register and Employment Survey; Mid-year population estimates.

- 5.4.8. Sectoral employment figures show that the most dominant employment sectors in Cherwell are retail (12.1%), manufacturing (10.8%) and health (9.6%) (**Table 5-11**). The high retail employment relative to Oxfordshire (8.7%) and GB (9.5%) is not unexpected given the area's proximity to Bicester Village retail outlet, one of the largest and most visited retail outlets in the UK.

Table 5-11 – Employment by Industry

| | Cherwell | Oxfordshire | Great Britain |
|---|--------------|-------------|---------------|
| Agriculture, forestry & fishing (A) | 1.8% | 1.3% | 1.6% |
| Mining, quarrying & utilities (B,D and E) | 1.0% | 1.1% | 1.3% |
| Manufacturing (C) | 10.8% | 6.7% | 8.0% |
| Construction (F) | 6.1% | 6.1% | 4.9% |
| Motor trades (Part G) | 3.5% | 1.9% | 1.8% |
| Wholesale (Part G) | 7.0% | 3.7% | 3.8% |
| Retail (Part G) | 12.1% | 8.7% | 9.5% |
| Transport & storage (inc postal) (H) | 3.8% | 3.5% | 4.7% |

| | Cherwell | Oxfordshire | Great Britain |
|--|----------|-------------|---------------|
| Accommodation & food services (I) | 6.1% | 7.0% | 7.4% |
| Information & communication (J) | 3.2% | 5.3% | 4.2% |
| Financial & insurance (K) | 1.3% | 1.3% | 3.4% |
| Property (L) | 1.9% | 1.9% | 1.8% |
| Professional, scientific & technical (M) | 7.0% | 10.6% | 8.5% |
| Business administration & support services (N) | 8.9% | 6.7% | 8.9% |
| Public administration & defence (O) | 5.1% | 2.8% | 4.1% |
| Education (P) | 6.4% | 15.4% | 8.6% |
| Health (Q) | 9.6% | 11.9% | 13.0% |
| Arts, entertainment, recreation & other services (R, S, T and U) | 4.1% | 4.5% | 4.6% |

Source: Business Register and Employment Survey (2017).

5.4.9. As can be seen in **Figure 5-2**, over the period 2009 to 2017, employment in Cherwell increased by 8%. This was smaller than the increase in Oxfordshire (11%) and GB (9%) over the same period.

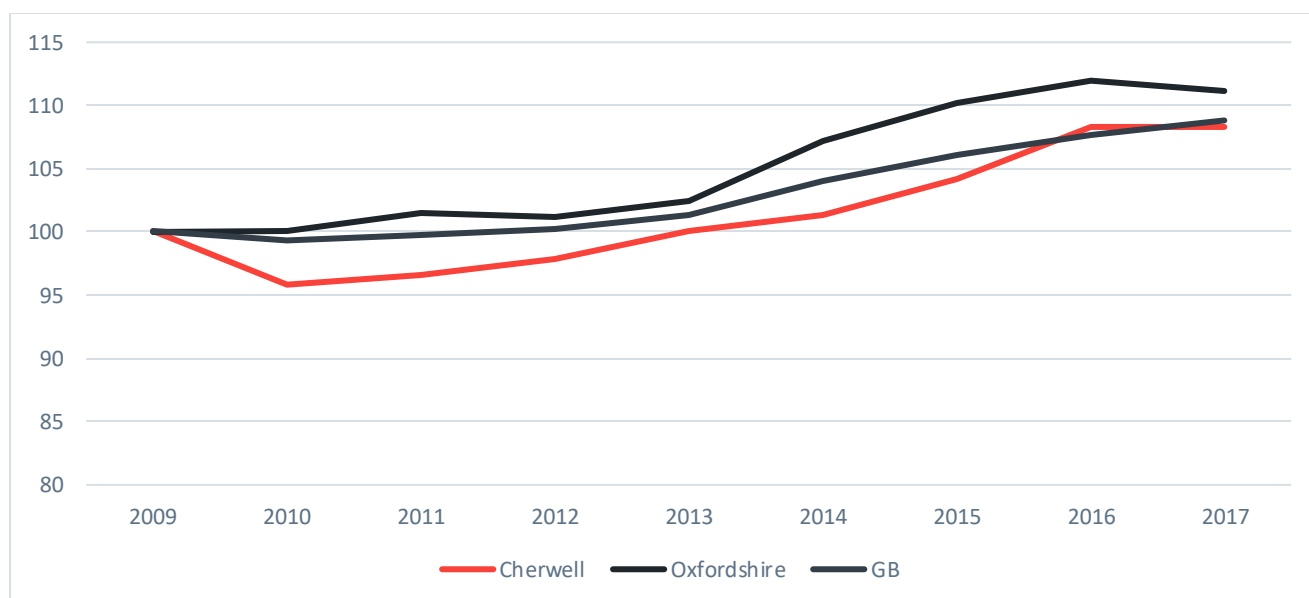


Figure 5-2 - Employment Index 2009 to 2017 (2009 = 100), BRES 2009 - 2017

Source: Business Register and Employment Survey (2009 to 2017)

5.4.10. During the month of June 2019, there were an estimated 65 unemployed residents in Cherwell that were claiming Jobseeker’s Allowance and actively seeking work. This equates to a claimant rate (per economically active) of 0.1; on par with Oxfordshire (0.1) but lower than England (0.5). The number of claimants has decreased year-on-year in all geographies, by 51% in Cherwell, 42% in Oxfordshire and 50% in GB relative to June 2018. In Oxfordshire, there were 550 claimants.

Current Employment on Site

5.4.11. The site of the Proposed Development is currently part of an 18-hole golf course. The wider golf course site also contains a hotel and spa, known as Bicester Hotel Golf and Spa. There are 8 FTEs and 2 hourly employees at the golf course, and there are 19 FTEs with 6 hourly employees at the hotel and spa. Hourly workers are part time workers, such as specialist instructors providing a yoga session for an hour. This equates to approximately 30 FTEs in total at the Site.

Local employment and commuting

5.4.12. **Table 5-12** shows that, in 2011, 64% of workers in the local area resided in Cherwell. Of the rest, 13% live in other parts of Oxfordshire and 23% are from the rest of England and Wales.

Table 5-12 Local Employment (2011)

| | Commute to local area |
|---------------------------|-----------------------|
| Cherwell | 64% |
| Rest of Oxfordshire | 13% |
| Rest of England and Wales | 23% |

Source: Census (2011)

5.4.13. **Figure 5-3** below shows the 77% of workers in Oxfordshire, distributed by their origin LSOA (based on Census 2011 data). It is evident that most of the workers live near the Local Area, with the largest proportion of workers residing in the local area itself. A few workers are also coming from Bicester, which follows given the proximity.

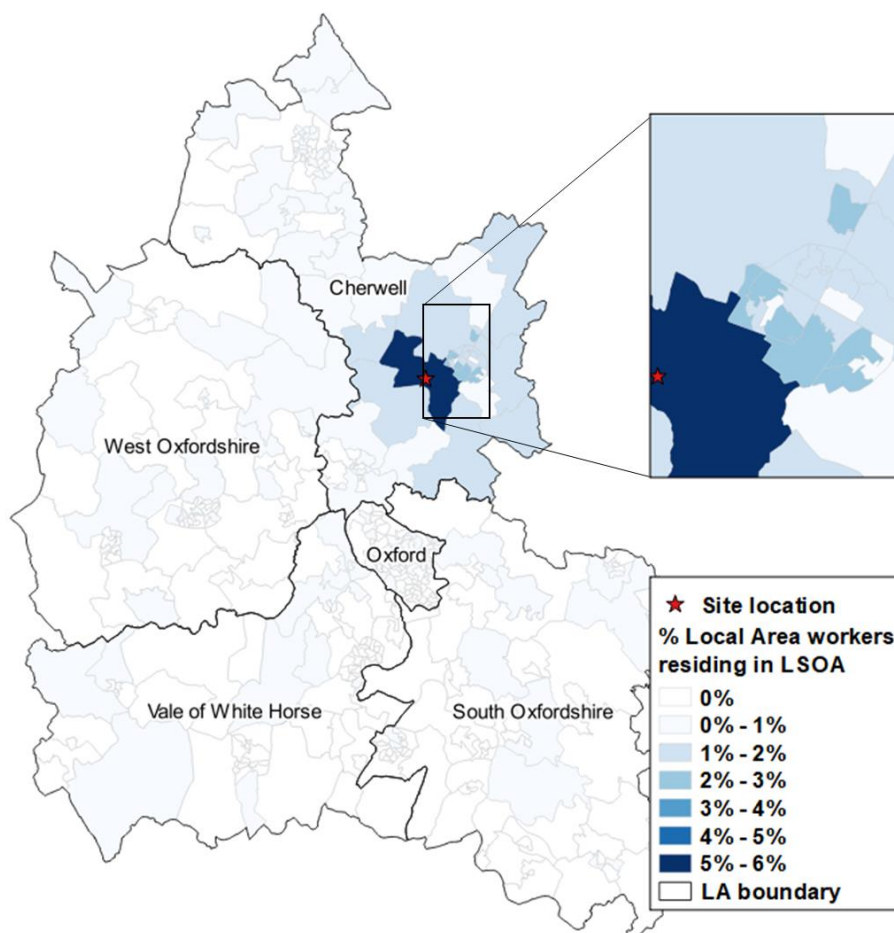


Figure 5-3 - Commuting origins for local area workers, Census 2011

Source: Census (2011).

Leisure and Tourism

- 5.4.14. The Site comprises Bicester Hotel Golf and Spa which is located within the vicinity of a renowned retail destination, namely Bicester Village. These are part of the strong leisure and tourism industry in the area. According to Destination Research (**Ref. 5.10**), there were c. 2.1m tourism day trips to Cherwell in 2017, which does not include visits to Bicester Village of which there were 6.6m in 2017, up from 6.4m in 2016. Across Oxfordshire, there were 27.1m day trips (approximately 12% of day trips to the South East) and 2.8m overnight trips. The number of overnight trips to Oxfordshire increased by 2% year on year to 2017, whilst the number of day trips increased by 9%.
- 5.4.15. Destination Research estimates that the total tourism value generated from direct, indirect and induced tourism spend in Oxfordshire totalled £2.2bn in 2017, supporting a total of 36,900 tourism-related jobs. This is equivalent to 26,900 full time equivalent jobs or 10% of total employment in Oxfordshire.

Leisure Provision

- 5.4.16. The Proposed Development is unique to Cherwell and Oxfordshire and would attract a different visitor base than existing leisure facilities. As such it is difficult to provide a specific baseline against



which its effect can be reasonably assessed. This section presents some information on the existing leisure baseline to provide some context.

- 5.4.17. According to the Open Space, Sport & Recreation Assessment, there are seven swimming pools available for community access in Cherwell with a mix of ownership, five offering at least some pay and play access. The assessment finds that almost everyone in Cherwell with access to a car can reach a pay and play pool within 20 minutes. The nearest facility to the Site with a wave pool or water park type offering is Aqua Vale Swimming and Fitness Centre, Aylesbury, which is approximately a 35 minute drive from the Site.

Golf

- 5.4.18. CBRE note several national golf trends:

- The total number of golf members in England has been falling year on year at a rate of 1.64% between 2000 and 2017 at the same time that there was annualised population growth of 0.68%. Although 2016 showed a small improvement from the 2015 low of c.655,000 this has not been sustained and membership declined again in 2017 back to c.655,000, which is only 1.2% of the national population;
- From 2015 the number of golfing facilities has fallen from 1,991 to 1,936, representing a year on year decline of 1.39%. This has been mirrored across the UK, with an overall drop in facilities of c. 3.8% from 2014 with Scotland seeing the strongest decline of c. 6.2%;
- There has been a 38.8% decline in participation since 2007, representing an average year on year decline of 4.47%;
- Several new formats have been trialed in recent years and there has been increased demand for the shorter 9 hole game: England Golf has reported a 50% increase in nine hole competitive scores returned between 2014 and 2017; Golf's professional circuits are also embracing shorter formats of the game with the exciting GolfSixes event recently played on the European Tour and the popular junior GolfSixes League expanding through new partnerships across Europe; and the Royal and Ancient Golf Club of St Andrews (R&A) conducted a survey on pace of play which revealed that 60% of golfers would enjoy golf more if it took less time.

- 5.4.19. The Open Space, Sport and Recreation Assessment and Strategies notes that there are currently 8 golf courses in Cherwell which all offer 18-hole courses, some with driving ranges. It notes that the spread of golf provision means that everyone with access to a car can reach a course within 20 minutes' drive time. The report notes that:

“England Golf's analysis suggests there may be the potential for more demand, but in Cherwell the current 18 hole dominant format may be hindering the uptake of the sport.”

- 5.4.20. According to CBRE (**Ref. 5.8**), there are currently 32 golf courses within 20 miles of the site, 23 of which are 18 hole and 6 of which are 9 hole courses.
- 5.4.21. As outlined in **Table 5-13**, within a 30 minute drive of the site, there are 19 courses (14 18 hole and three 9 hole). Within a 20 minute drive of the site, there are five courses – there is no dedicated 9 hole format provision within this key drive time.

Table 5-13 - Golf course supply within 30-minute drive of the Site

| | 20 minutes | 30 minutes |
|-----------|------------|------------|
| Courses | 5 | 19 |
| 27 hole + | 1 | 2 |
| 18 hole | 4 | 14 |
| 9 hole | 0 | 3 |

Source: CBRE (2019)

5.4.22. CBRE note that:

“England Golf provided unpublished information to Cherwell council from their 2016 England Golf Club Survey. This shows that the average number of members within clubs in Cherwell is broadly in line with the rates across the other adjacent authorities. It also shows that these levels are all materially lower (16% lower) than the average for England as a whole.”

5.4.23. They argue that whilst the participation rate in Cherwell is approximately double the national average, the number of members per club is very low. CBRE find that “high participation and low members per club is indicative of a market with a large oversupply. This is corroborated by the information above on pricing further building a picture of a very strong competitive environment with no / low joining fees and tightly grouped subscriptions.”

Visitor and Tourist Spend

5.4.24. According to Destination Research (**Ref. 5.10**), a total of 30 million trips were made to Oxfordshire in 2017. Of this, 27m were day trips, equating to approximately 12% of day trips to the South East. There were 2.1m day trips to Cherwell, which does not include visits to Bicester Village of which there were 6.6m in 2017, up from 6.4m in 2016.

5.4.25. The tourists added a total value of £2.2bn to Oxfordshire, comprised of a direct turnover of £1.7bn and indirect and induced turnover of £0.5bn. Of this tourism expenditure, 32% was on food and drink and 23% was on shopping. This £2.2bn supported approximately 27k FTEs (39k jobs) which accounted for 10% of all employment in Oxfordshire. The spend and jobs supported by tourism represented a 6% increase on the previous year.

Occupations

5.4.26. **Figure 5-4** shows the occupational split of those in employment in Cherwell, Oxfordshire and Great Britain. It demonstrates that Cherwell has a higher proportion of highly skilled occupations⁵ than Great Britain, but fewer than Oxfordshire. Cherwell has a relatively low proportion of jobs in elementary occupations.

⁵ Defined as managers, directors and senior officials, professional occupations, associate prof & tech

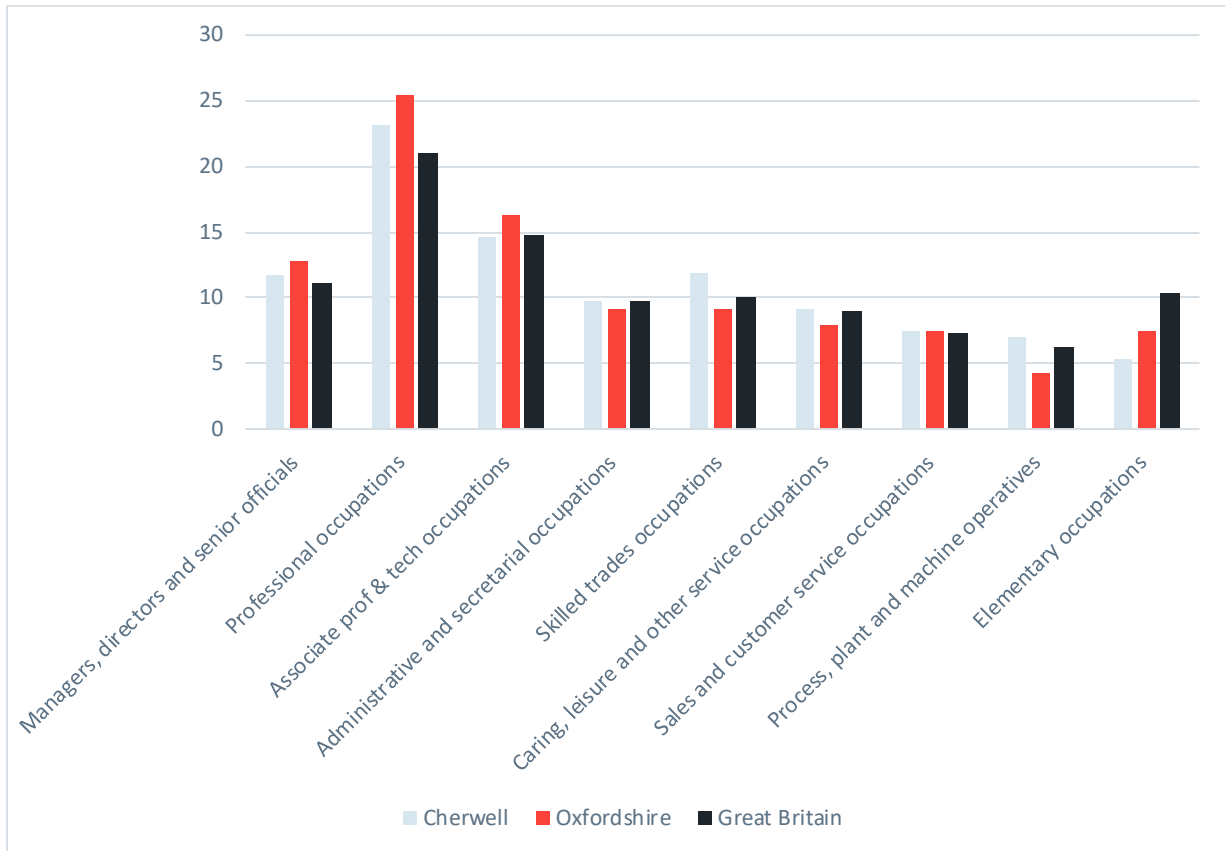


Figure 5-4 – Proportion of Those in Employment in Occupations

Source: Annual Population Survey (July 2018 to June 2019)

5.4.27. **Figure 5-5** shows that 64% of jobseekers in Oxfordshire are looking for work in sales and customer service occupations, whereas only 7% of those employed in Oxfordshire work in those occupations. Even after only looking at the distribution, hotels and restaurant sector, there are still far fewer workers in these occupations (35%) than jobseekers.

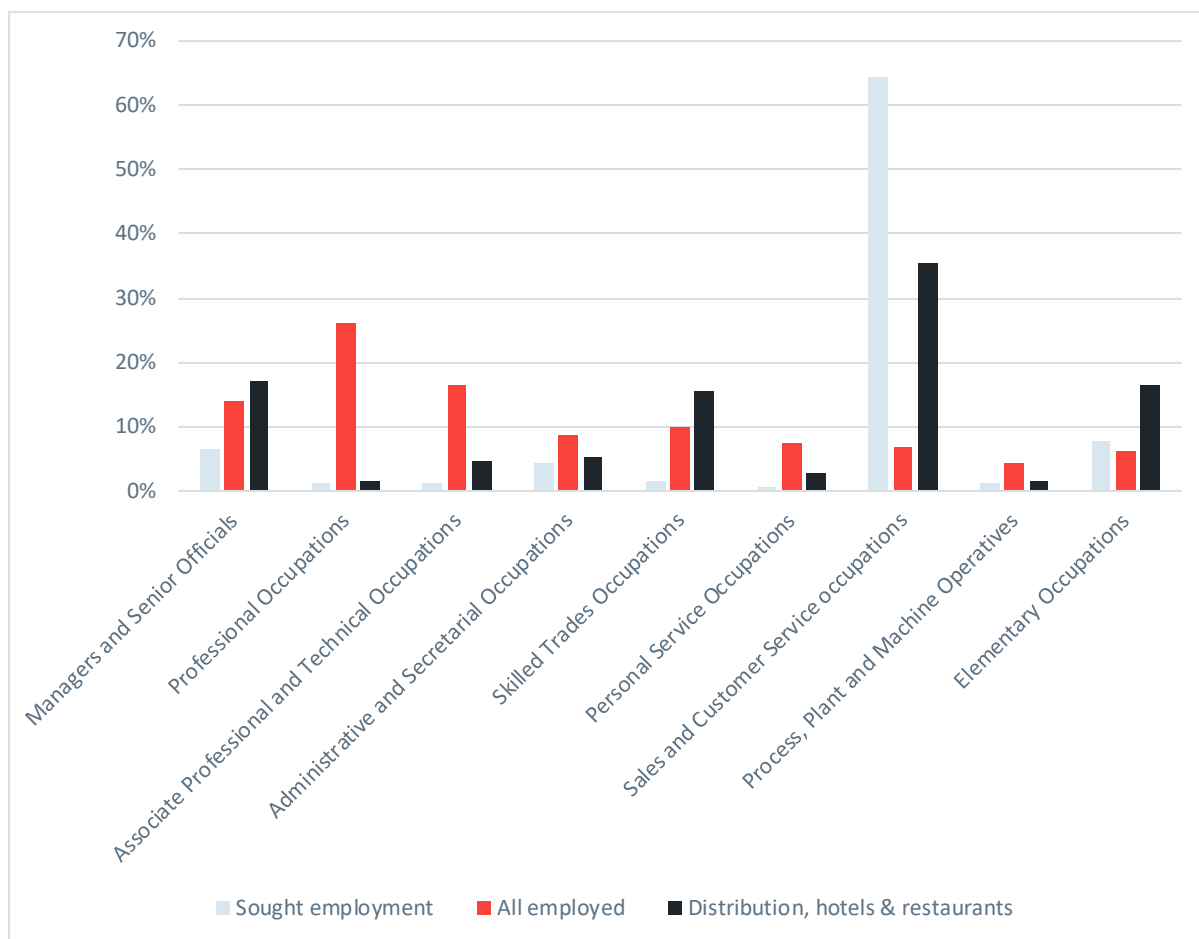


Figure 5-5 – Occupations sought versus occupations held in Oxfordshire

Sources: Jobseekers Allowance 2018, Annual Population Survey (Workplace Analysis) 2018

FUTURE BASELINE

Population

Table 5-14 – Housing-led Population Forecasts

| | | 2017 | 2027 | Growth | % growth |
|-------------|---------------|---------|---------|---------|----------|
| Bicester | All ages | 51,700 | 72,200 | 20,600 | 40% |
| | Aged 18 to 64 | 32,300 | 45,400 | 13,100 | 40% |
| Cherwell | All ages | 147,600 | 181,900 | 34,300 | 23% |
| | Aged 18 to 64 | 88,600 | 108,100 | 19,500 | 22% |
| Oxfordshire | All ages | 687,500 | 822,200 | 134,800 | 20% |
| | Aged 18 to 64 | 420,800 | 495,700 | 74,900 | 18% |

Source: Oxfordshire County Council (2019).



5.4.28. The Bicester population is expected to grow by 20,600 people (40%) between 2017 and 2027. This is faster than the growth for Cherwell (23%) and Oxfordshire (20%). In a similar way, the working-age population of Bicester is due to grow by 40%, faster than Cherwell (22%) and Oxfordshire (18%). Most geographies forecast growth of the working age population to be smaller than that of the total population, due to the generally ageing population.

Employment

5.4.29. According to Growing Bicester (**Ref. 5.13**), Bicester has the potential to offer 18,500 new jobs up to 2031, 6,000 of which will be in Bicester Business Park (Kingsmere) in office (B1) uses. A further 3,000 are in North West Bicester, some of which will be in shops (A1), restaurants/cafes (A3), hotels (C1) and leisure (D2).

Leisure Provision

5.4.30. The Open Space, Sport and Recreation Assessment and Strategies for Cherwell (**Ref. 5.14**) identified that there is a long term need for additional provision by 2031 of 1 x 18 hole course or 2 x 9 hole courses and 8 driving range bays in Bicester. However, it notes that Cherwell's needs can be met. However, CBRE note that they reviewed this approach and found that it is not appropriate because:

- Demand shift to shorter formats;
- Catchment area is too small; and
- Maximum capacity assessment does not take into account oversupply and dramatic fall in members per club.

5.4.31. CBRE *“ran two scenarios adjusting the Local Authority’s method for these factors:*

- *First assessment adopts a best case and allows for membership growth in line with the population growth rate of the key golfing demographic which is growing quicker than the wider population;*
- *The second assessment is a base case and allows for membership growth in line with population growth rate of Cherwell;*
- *CBRE consider that membership demand in the catchment will likely sit between these levels.*

Key finding is that allowing for the membership decline and at more appropriate capacity estimates the Cherwell market shows a strong oversupply, there is significant excess capacity and no new courses are required in the catchment. Even on the very conservative capacity estimate adopted by the local authority demand assessment there is unlikely to be demand for additional golf provision before 2030 even allowing for best case scenario for membership growth based on the growth of the over 55 males key demographic growth.”

5.4.32. The Open Space, Sport and Recreation Assessment and Strategies also notes that there is a requirement for pool space in Bicester, which only has one main pool. The assessment recommends that a new community pool of 25m x 6 lane competition pool plus teaching pool is provided in Bicester.

SENSITIVE RECEPTORS

5.4.33. The following are the sensitive receptors which have been assessed:

- Labour market;

- Local jobs and availability of local workforce;
- The recipients of local expenditure;
- Leisure provision and leisure users; and
- Skills and qualifications of local residents.

5.5. RELEVANT ELEMENTS OF THE PROPOSED DEVELOPMENT AND ESTABLISHING THE PRE-MITIGATION SCENARIO

CONSTRUCTION PHASE

5.5.1. There are no potentially significant effects in the Construction Phase.

OPERATIONAL PHASE

5.5.2. In the Operational Phase, the key element of the Proposed Development that is relevant to the pre-mitigation scenario is the provision of the leisure facilities on site including a water park and adventure park, including activities such as miniature golf and climbing walls etc.

5.6. ASSESSMENT OF EFFECTS, MITIGATION AND RESIDUAL EFFECTS

CONSTRUCTION PHASE

5.6.1. There are no potential significant effects in relation to the Construction Phase.

OPERATIONAL PHASE

Operational Employment (direct, indirect and induced)

5.6.2. The table below outlines the gross jobs estimated at the Proposed Development. The estimates were generated using the methodology outlined above.

Table 5-15 - Gross Direct Operational Employment Generation

| | Gross sqm | Net sqm | FTEs | Jobs |
|----------------------|-----------|---------|------|------|
| Guestrooms & support | 27,250 | n/a | 165 | 215 |
| Lobby | 1,870 | n/a | 0 | 0 |
| Connector zone | 970 | 820 | 25 | 30 |
| FEC recreation | 2,770 | 2,350 | 70 | 95 |
| FEC food & beverage | 1,000 | 850 | 50 | 60 |
| Meeting | 1,400 | 1,200 | 55 | 70 |
| Waterpark | 8,340 | n/a | 100 | 125 |



| | Gross sqm | Net sqm | FTEs | Jobs |
|-------|-----------|---------|------|------|
| Total | 43,610 | n/a | 460 | 600 |

Source: Volterra calculations (figures may not sum due to rounding)

- 5.6.3. Since there are no anticipated job losses on the existing site, the direct employment generated by the Proposed Development is seen as entirely additional.
- 5.6.4. Based on the methodology outlined above, it is estimated that 540 net additional FTEs (700 jobs) will be supported as a result of the Proposed Development⁶. Of these, 90 are as a result of additional visitor spending in the local area.

Table 5-16 - Net Additional Employment Generation

| | FTEs | Jobs |
|---------------------------------|------------|------------|
| Gross | 460 | 600 |
| Net direct (after displacement) | 350 | 450 |
| Net indirect (multiplier) | 100 | 130 |
| Visitor spend effects | 90 | 120 |
| Total net additional | 540 | 700 |

Source: Volterra calculations.

- 5.6.5. Since jobseekers allowance claimant rates are very low for Cherwell (65 claimants in June 2019), other things being equal, it would be likely that the majority of these jobs will be taken by jobseekers in the rest of Oxfordshire, or people already in employment changing jobs. However, the Cherwell population is projected to increase by 34,300 (23%) between 2017 and 2027, including 19,500 (+22%) residents aged 18 to 84 (Ref. 5.12). These are larger growth figures than the equivalent for Oxfordshire (20% and 18% respectively). Indeed, at the site middle super output area (MSOA) level, there are projected to be 3,400 additional 18 to 64-year olds between 2017 and 2027. Therefore, whilst there may be few job seekers currently in Cherwell, the increase in the working-age population will be well placed to take up the operational job offering at the Proposed Development in the future.
- 5.6.6. Furthermore, the operational jobs at the Proposed Development will offer a diverse range of job opportunities across a range of skills. The Applicant has as many as 174 different roles to offer workers, ranging from 'individual contributor' levels such as a waterpark attendant, to more senior 'directors' such as director of housekeeping. All these roles may not be required at the Proposed Development – the roles required at each resort vary, depending on the needs of the individual resort – but there will always be enough variety in the responsibility level and the skills required that a worker will find a role suitable for them and be able to see clear progression. An overview of the occupational skill level of potential roles is set out in the table below. Management roles vary from

⁶ An assessment of leakage is carried out in the geographic distribution of employment effect below

general manager to manager; professional roles vary from supervisors to leads; and front line positions consist of individual contributors such as cashiers, attendants and lifeguards. Notably, many of these roles will be offered in the occupations most highly sought by Oxfordshire residents, as outlined in **Figure 5-5**.

Table 5-17 – Potential Role Count at Different Skill Levels

| Skill | Proportion of total |
|-------------------------------|---------------------|
| Management and Director Roles | 5% |
| Supervisors and Leads | 6% |
| Front Line Positions | 89% |

Source: The Applicant.

- 5.6.7. The wage policy for the Proposed Development has not been finalised yet because it would not be operational for two to three years. However, the Applicant is committed to paying competitive wages, which would benefit local residents.
- 5.6.8. These high skill and wage offerings will increase the skill level of those who are employed, in line with the Oxfordshire Local Industrial Strategy, the wider ‘Arc’, and Cherwell’s economic strategy. These policies focus upon high value employment in terms of skills and incomes, providing stable employment with defined career paths and making house prices more accessible.
- 5.6.9. The sensitivity of Oxfordshire employment is considered to be low, and the magnitude of change prior to mitigation, is considered to be medium. Therefore, there is likely to be a direct, permanent, long-term **minor beneficial** effect on employment (**not significant**) prior to the implementation of mitigation measures.

Secondary Mitigation

- 5.6.10. There are no mitigation measures required or proposed for socio-economics in relation to operational employment generation. It is not considered appropriate for there to be any monitoring arrangements.

Residual Effects

- 5.6.11. The sensitivity of Oxfordshire employment is considered to be low, and the magnitude of change following mitigation, is medium. Therefore, there is likely to be a direct, permanent, long-term **minor beneficial** effect on employment (**not significant**) following the implementation of mitigation measures.

Geographical Distribution of Employment Opportunities

| | |
|---|---|
| Geographic distribution of employees | <p>Based on the 2011 Census commuting patterns, 64% of workers in the local area LSOA are expected to live in Cherwell and 13% in the rest of Oxfordshire. Based on this, an estimated 295 FTEs of jobs at the Proposed Development would live in Cherwell, with a further 60 FTEs residing in the rest of Oxfordshire.</p> <p>Unemployment rates are low in Cherwell and Oxfordshire but many local residents are seeking employment and the population is expected to grow significantly:</p> |
|---|---|

| | |
|--|---|
| | <ul style="list-style-type: none"> • There are 4,400 people in Cherwell who are classified as economically inactive but want a job – a third of people who are economically inactive; higher than the Oxfordshire (16%) and GB (21%) averages; • Jobs at the Proposed Development appeal to young people and students: 42% of the Applicant's other developments are under 22, with many in their first-ever job. Local young people are seeking work but do not show up in unemployment statistics. For example, there are several thousand students at nearby Oxford Brookes. Student demand for part time work has been increasing in recent years. Research by Endsleigh and the National Union of Students in 2015 suggested that the proportion of university students who worked during their degree was 77%, an increase from 59% in the previous year (Ref. 5.15). The majority of these jobs were part time. Over half (56%) of working respondents reported that they worked to help cover the costs of university, and 87% reported that they worked to enhance their CV and develop additional skills; and • Between 2017 and 2026, the population of Oxfordshire is expected to grow by 20% and Cherwell's population is expected to grow by 18% (Ref. 5.12), higher than the national growth of 8%. <p>Given the number of jobs that would be created by the Proposed Development and the likely increase in demand for jobs in the area, the Proposed Development is expected to create local jobs.</p> <p>The sensitivity of local employment is considered to be low, and the magnitude of change prior to mitigation, is considered to be low. Therefore, there is likely to be a negligible effect on local employment ('not significant') prior to the implementation of mitigation measures.</p> |
| Secondary Mitigation | The Applicant is committed to supporting local jobs. The Planning Statement outlines the draft Head of Terms. The draft Head of Terms notes that the Applicant will provide local recruitment initiatives during the operational phase and will work with specialist course departments at UK universities and colleges. |
| Residual effects and monitoring | The sensitivity of local employment is considered to be low, and the magnitude of change prior to mitigation, is considered to be low. Therefore, there is likely to be a negligible effect on local employment (not significant) following the implementation of mitigation measures. |

Visitor Expenditure

| | |
|--|---|
| Visitor spending | <p>Following the methodology outlined earlier, visitors to the Proposed Development are estimated to spend c. £4.9m per year in Oxfordshire on retail and food & drink outside the Proposed Development. This is less than a 1% increase on total annual visitor spending in Oxfordshire.</p> <p>The sensitivity of annual visitor spending is considered to be low, and the magnitude of change, prior to mitigation, is low. Therefore, there is likely to be a negligible effect on visitor spending (not significant) prior to the implementation of mitigation measures.</p> |
| Secondary Mitigation | There are no mitigation measures required or proposed for socio-economics in relation to visitor expenditure. It is not considered appropriate for there to be any monitoring arrangements. |
| Residual effects and monitoring | The sensitivity of annual visitor spending is considered to be low, and the magnitude of change, following mitigation, is low. Therefore, there is likely to be a negligible effect on visitor spending (not significant) following the implementation of mitigation measures |

Contribution to Leisure Provision

| | |
|---|---|
| <p>Contribution to leisure</p> | <p>The Proposed Development would result in a step change in leisure provision in Cherwell and Oxfordshire, in terms of providing a unique attraction which is currently not replicated elsewhere in the sub-region. This would attract local residents and additional tourists to the area, resulting in additional economic activity in the area. According to Leisure Development Partners, tourism penetration rates among indoor waterpark hotels, similar to the Proposed Development, can be significant as they are a key tourism driver for the local area. On that basis, the Proposed Development would attract families with young children that would otherwise not be incentivised to visit Cherwell or Oxfordshire. These families would also be expected to have linked trips to other places locally, such as Bicester Village. The Proposed Development is expected to attract new and younger tourists to the area, making it a more inclusive use of the site.</p> <p>The majority of the members of the existing golf course lives within a 20-30 minute drive. The golf course is also only providing amenity to a very small proportion of the total population of Cherwell. All of this suggests that the penetration of the existing golf course is low and within a short drive time. Typical penetration rates show that indoor water parks capture demand from 2 hours drive time away and even further afield. The catchment of the Proposed Development will likely be larger than the existing golf course, with higher penetration rates among local residents.</p> <p>The Proposed Development would also result in the loss of golf course space, decreasing the existing golf course from 18 to 9 holes, reducing golf course provision in Cherwell. However, CBRE concludes that:</p> <p><i>“The golf course is providing amenity to only a very small proportion of the total population of Cherwell and the wider area;</i></p> <ul style="list-style-type: none"> • <i>The course’s membership and revenue has fallen significantly in line with the wider oversupply in the UK. The importance of this income has fallen in the context of the wider hotel and leisure business;</i> • <i>There is significant additional 18 hole golf provision within an acceptable drive time for members that want it. In addition, the likely demographic subset overwhelmingly has access to a car and significant alternate 18-hole provision within a 20 minute drive time;”</i> <p>Loss of 9 holes of golf from Bicester Hotel Golf Spa is therefore unlikely to constitute a material loss of amenity to most Cherwell residents or damage the wider hotel and leisure business. The new leisure provision provided within the Proposed Development is therefore expected to outweigh any negative impact from the loss of golf course space. In the context of falling memberships, existing provision, and golf trends, this loss of space is not expected to have a significant impact on the local area. In contrast, the Proposed Development will appeal, and be accessible, to a wider proportion of the local demographic, with a larger catchment area.</p> <p>The sensitivity of the contribution to leisure is considered to be medium, and the magnitude of change prior to mitigation, is considered to be medium. Therefore, there is likely to be a direct, permanent, long-term moderate beneficial effect on the contribution to leisure (significant) prior to the implementation of mitigation measures.</p> |
| <p>Secondary Mitigation</p> | <p>There are no mitigation measures required or proposed for socio-economics in relation to leisure provision. It is not considered appropriate for there to be any monitoring arrangements.</p> |
| <p>Residual effects and monitoring</p> | <p>The sensitivity of the contribution to leisure is considered to be medium, and the magnitude of change, following mitigation, is considered to be medium. Therefore, there is likely to be a direct, permanent, long-term moderate beneficial effect on the contribution to leisure (significant) following the implementation of mitigation measures.</p> |

Employee Training and College Partnerships

| | |
|--|--|
| <p>Employee training and College partnerships</p> | <p>The Proposed Development will also offer key skills development and training opportunities, such as lifeguard qualifications, which will help Cherwell residents upskill, aligned with the Cherwell Local Plan objective to "increase skills". The Proposed Development will also offer a variety of different occupational skilled jobs, able to accommodate many different types of workers with different work experience. For example, there will be c.540 front line positions on offer such as cashiers that will make work more accessible to people looking for work but with currently low skill levels. Many of the roles will be lifeguards. The lifeguard qualification offered by the Applicant in the US is industry leading, thus offering people entry level positions but ones which result in valuable training and upskilling as well. The same level of qualification will be offered at the Proposed Development.</p> <p>The existing lodges provide evidence that the Applicant has been successful in partnering with local groups and colleges to facilitate work opportunities for students and other residents, such as partnering with local culinary schools and programs to identify and employ cooks and chefs in the Great Wolf Resort restaurants. This is in keeping with the Oxfordshire Local Industrial Strategy which states a key strategic priority as "getting the fundamentals right – building a skills system that better responds to local demand (see p52 of the <i>Local Industrial Strategy</i>)". The Applicant has also been successful at working with local community groups in the UK, such as Autism Speaks, and developing relationships with the local community. From an early stage in the process, the Applicant has engaged with local businesses and business groups, and education providers, such as Oxford Brookes, in order to understand how they can work with the local community and maximise local economic benefits.</p> <p>The sensitivity of local residents' skills is considered to be medium, and the magnitude of change, prior to mitigation, is medium. Therefore, there is likely to be a direct, permanent, long-term moderate beneficial effect on local residents' skills (significant) prior to the implementation of mitigation measures.</p> |
| <p>Secondary Mitigation</p> | <p>The Applicant is committed to supporting local jobs and training. The Planning Statement outlines the draft Head of Terms. The draft Head of Terms notes that the Applicant will provide local recruitment initiatives during the operational phase and will work with specialist course departments at UK universities and colleges. The draft Head of Terms also notes that the Applicant will provide a minimum of 150 local construction apprenticeships or apprenticeship starts as part of a wider Employment, Skills and Training Plan – and will progress discussions with local construction apprenticeships facilitator, Ace Training.</p> |
| <p>Residual effects and monitoring</p> | <p>The sensitivity of local residents' skills is considered to be medium, and the magnitude of change, prior to mitigation, is medium. Therefore, there is likely to be a direct, permanent, long-term moderate beneficial effect on local residents' skills (significant) following the implementation of mitigation measures.</p> |

5.7. LIMITATIONS AND ASSUMPTIONS

- 5.7.1. The assessment of socio-economic impacts and effects is carried out against a benchmark of current socio-economic baseline conditions prevailing in the area of the Site, and relevant other geographies. As with any data set, the baseline data will change over time. The most recent published data sources are used in this assessment, which is usually data from either 2017 or 2018, but where this has not been available, the next best alternative (i.e. the most up-to-date) is used as a proxy. For example, the most recent data source for commuting patterns is the 2011 Census. The

assessment is therefore limited by the latest available data and information. In order to provide an estimate of the future baseline in 2022, assumptions have been used which have been based upon information within the public domain on the various development schemes within the surrounding area expected to be operational by 2022.

5.7.2. There are wider impacts and resultant effects of schemes which are hard to quantify, such as displacement, leakage and multiplier impacts. Whilst accepted methods of quantification have been used wherever possible, expert judgment has been applied where necessary. Where judgment has been used, justification and explanation has been provided.

5.8. SUMMARY

- 5.8.1. This Chapter has presented an assessment of the socio-economic effects of the Proposed Development by assessing the impact of the Proposed Development compared to baseline conditions.
- 5.8.2. Analysis of the baseline conditions revealed that Cherwell has a fairly low skilled resident population relative to the regional and national averages, and a large proportion of Cherwell workers work in retail, manufacturing and health. There are a very low number of jobseekers in Cherwell (65 in June 2019) and the claimant rate per economically active resident is far lower than the GB average (0.1 versus 0.5). Of the local area workers, 64% reside in Cherwell and a further 13% in Oxfordshire. In terms of leisure provision, CBRE reported an oversupply of golf courses in the area, and there are no 9 hole golf courses within a 20 minute drive of the Site. In 2017, visitors to Oxfordshire added £1.7bn direct spend to the economy, with a large proportion on food and drink and retail.
- 5.8.3. During operation, the Proposed Development is expected to have direct, permanent, long-term **minor beneficial (not significant)** residual effect on employment, generating 530 net additional FTEs, 455 of which as a result of the direct, indirect and induced jobs effects and 85 of which will be in retail and food and beverage sectors as a result of additional visitor spending in the local area.
- 5.8.4. These FTEs are expected to mainly reside in the Oxfordshire region, and are expected to have a **negligible (not significant)** residual effect on the geographical distraction of employees.
- 5.8.5. The £4.9m a year of visitor spend that is estimated to take place in the Oxfordshire region is expected to have a **negligible (not significant)** residual effect on visitor spending.
- 5.8.6. The Proposed Development is expected to have a direct, permanent, long-term **moderate beneficial (significant)** residual effect on the contribution to leisure.
- 5.8.7. There is likely to be a direct, permanent, long-term **moderate beneficial (significant)** residual effect on local residents' skills
- 5.8.8. The table below presents as summary the effects.

Table 5-18 - Summary of Effects Table for Socio Economics

| Description of Effects | Receptor | Significance and Nature of Effects Prior to Mitigation / Enhancement | Summary of Mitigation / Enhancement | Significance and Nature of Effects Following Mitigation / Enhancement (Residual) |
|------------------------|----------|--|-------------------------------------|--|
| | | | | |

| Operational Phase | | | | |
|---|-------------------------|--|---|--|
| Operational Employment | Oxfordshire employment | Minor beneficial (not significant) + / P / D / LT | There are no mitigation measures | Minor beneficial (not significant) + / P / D / LT |
| Geographical distribution of employment opportunities | Local employment | Negligible (not significant) | The Draft Head of Terms | Negligible (not significant) |
| Visitor expenditure | Annual visitor spending | Negligible (not significant) | There are no mitigation measures | Negligible (not significant) |
| Leisure | Leisure provision | Moderate beneficial (significant) + / P / D / MT | There are no mitigation measures | Moderate beneficial (significant) + / P / D / MT |
| Employee training and college partnerships | Residents' skills | Moderate beneficial (significant) + / P / D / MT | S106 commitments to employment and skills | Moderate beneficial (significant) + / P / D / MT |

NB: Aspects of the Proposed Development considered as part of the pre-mitigation scenario are summarised above in Section 5.5.

Key to table:

+ / - = Positive or Negative P / T = Permanent or Temporary, D / I = Direct or Indirect, ST / MT / LT = Short Term, Medium Term or Long Term N/A = Not Applicable

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