# Economic Statement

Proposed Great Wolf Lodge / Great Lakes UK Limited

A report by Volterra Partners, November 2019

Volterra

# KEY ECONOMIC HEADLINES

## CONSTRUCTION PHASE

The construction phase is expected to support **an average of 945 construction jobs over the two year construction period**

Construction workers are expected to support **c. £1.3m of expenditure in the local economy** over the duration of the construction period

## OPERATIONAL PHASE

**600 gross additional jobs upon completion**

Equivalent to 460 additional FTEs

**700 net additional jobs in Oxfordshire**

Equivalent to 540 FTEs, once displacement, indirect & induced effects are taken into account

**Up to £23m** in additional GVA per annum

**Up to £9m** in additional tax revenues per annum

Workers are expected to spend £157,000 per year in the local area

Great Wolf Lodge visitors are expected to spend £4.9m each year in Oxfordshire on retail, food and beverages

## THE NEED FOR TOURISM AND LEISURE

**This will be the first Great Wolf Lodge waterpark in the UK, bringing world-leading waterslides & entertainment which will appeal to families and deliver a leisure offering not currently available**

**The tourism sector plays a vital role in the local economy**

In 2017, there were 30m tourism trips to Oxfordshire. These tourists supported £2.2bn in value and 37,000 jobs in Oxfordshire

**Short stay domestic holidays are rising in the UK**

Between 2016 and 2017, domestic holidays rose by 6% and short breaks (1-3 nights) were up by 7%, compared to 4% growth over the same period for UK residents' holiday visits overseas

**Diverse tourism offers can increase the tourism catchment bringing greater benefits**

Evidence that indoor waterpark resorts like the Proposed Development can attract high penetration rates of tourism

**Evidence of oversupply of local golf courses**

The reduction from 18 to 9-holes is not expected to constitute a material loss of golf course provision given adequate nearby alternatives and recent golf market trends

## WIDER BENEFITS

**The need for local jobs**

Whilst unemployment rates are currently low in Cherwell and Oxfordshire, this is only a partial picture and excludes many groups who are seeking work, including 4,000 residents who are economically inactive at present. Additionally, high levels of growth are forecast in Cherwell and Oxfordshire. The Proposed Development is expected to support 385 local jobs

**The jobs are well suited to residents in the area**

Jobs at the Proposed Development also appeal to young people and students: 42% of the Applicant's workers in other developments are under 22, with many in their first-ever job. There are several thousand students at nearby Oxford Brookes, which also provides tourism industry-related courses. Demand for part time work has been increasing in recent years

**Wages will be competitive, increasing local incomes**

The wages offered will be competitive, improving incomes of local people. The lifeguard qualifications are best in class and offer a valuable opportunity for local young people to upskill

**Skills, training and partnership offers in line with local policies**

The Proposed Development would support residents to upskill, maintain stable career paths and work with local partners to improve skills and job matching, all in line with the Cherwell Local Plan, the Oxfordshire Industrial Strategy and the strategic objectives of the Oxford-Cambridge Arc

**CASE STUDY ONE**

*One employee started as a Retail Attendant before moving to an Attractions Attendant role and then to Guest Services as a Private Branch Exchange (PBX) Operator (handling telephone calls). He is now a Night Auditor, leading Guest Services and Front Desk operations on the night shift.*

**CASE STUDY TWO**

*Another started as a Front Desk Agent 10 years ago, and was promoted within her first year to a Guest Services Supervisor. She then took a role as Sales & Catering Coordinator in the conference centre before a further step up to a Guest Services Manager where she remained for three years. Now, she has the leading role of Housekeeping Manager.*

**CASE STUDY THREE**

*Another started at Great Wolf 20 years ago as a Lifeguard. He then moved to Guest Services where he held roles as Supervisor, Manager and Director. A further promotion saw him take an Assistant General Manager position, before being made General Manager of the Wisconsin Dells lodge. He then moved to be General Manager of a new lodge at Colorado Springs.*

# 1 Executive Summary

1.1 This report provides an economic assessment of the proposed Great Wolf Lodge development in Bicester, Oxfordshire. Great Wolf Resorts (the Applicant) own a family of indoor water park resort hotels, particularly popular as family getaways. The Applicant has 18 resorts around the US, and are proposing to build their first UK lodge in Oxfordshire. The Proposed Development would be Great Wolf Resort's flagship resort in Europe as their first resort in the UK and in Europe, with the intention of building on their brand from here, and in time supporting further investment across the country.

1.2 The Proposed Development would deliver:

- a new flagship, 498 room UK resort, attracting 500,000 visitors each year;
- leisure facilities including: a water park, a Family Entertainment Centre with attractions such as a ropes course, climbing wall, family bowling and arcade games;
- a range of dining options;
- an active landscape design including an improved public right of way;
- flexible conference facilities for local businesses and private events; and
- 902 new parking spaces, including 56 disabled spaces and an array of EV charging points.

## Economic impacts during construction

1.3 It is expected that the construction of the Proposed Development will generate approximately 1,890 gross job years over the construction period, equivalent to 190 FTEs. This equates to an average of 945 workers on the Site over the two year construction programme[1].

1.4 It is expected that the construction workers will spend approximately £0.6m in the local area each year, equivalent to total expenditure of £1.3m over the duration of the construction period.

## Economic impacts once operational

1.5 The economic impacts of the Proposed Development are significant. It is anticipated to directly accommodate an estimated maximum of 600 jobs, all of which will be additional over and above what is there now.

1.6 These workers will spend up to an estimated additional c. £157,000 in the local area each year.

1.7 The Proposed Development is expected to attract 500,000 visitors each year. These visitors are expected to spend c. £4.9m per year on food and beverage and retail across Oxfordshire.

1.8 Allowing for displacement, the employment multiplier effect and further induced employment as a result of visitor spending, it is estimated that the Proposed Development would result in up to 700 net additional jobs, or 540 net additional FTEs, across Oxfordshire.

[1] While there is an estimated average of 945 workers on site per year over the whole construction period, this will vary considerably year by year depending on the stage of construction

1.9 The economic activity generated by the Proposed Development will directly contribute up to an additional £22.8m in gross value added (GVA) each year to the economy.

1.10 The Proposed Development is expected to result in additional tax revenues of between £6.8m and £9.1m each year to the Treasury.

## Supporting tourism and the need for leisure

1.11 The Site currently comprises part of the Bicester Hotel, Golf and Spa (BHGS) and it lies within the vicinity of a renowned retail destination, Bicester Village. These are part of the strong leisure and tourism industry in the area. Across Oxfordshire, there were 27.1m day trips (approximately 12% of all 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%. According to Destination Research, 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. Cherwell is therefore an important tourism location, which translates into economic benefits for the area.

1.12 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 10% of total employment in Oxfordshire. Of the £1.8bn of direct spend by tourists, nearly half (48%) was spent on holidays, almost a third (32%) of total spend was spent on food and drink, and 23% was on shopping.

1.13 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.

1.14 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.

1.15 The majority of the members of the existing golf course live within a 20-30 minute drive, with 73% living within Cherwell. The golf course is 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.

1.16 Domestic tourism is increasing, with a rise of domestic overnight holidays of 6% between 2016 and 2017, which is faster than growth in overseas tourism among UK residents (4%). According to the Travelodge annual holiday index, the percentage of Britons taking 'staycations' has increased from 35% in 2011 to 69% in 2019. Through provision of a unique leisure option currently not available in Oxfordshire, the Proposed Development would leverage this trend and increase the number of domestic tourists to the area and wider region.

1.17 Weighed up against this provision of additional leisure space, the Proposed Development would result in the loss of golf course space, decreasing the existing golf course from 18 to 9 holes, and thus reducing golf course provision in Cherwell. However, CBRE concludes that:

- "The golf course is providing amenity to only a very small proportion of the total population of Cherwell and the wider area;
- 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;
- 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;
- Loss of 9 holes of golf from BHGS is therefore unlikely to constitute a material loss of amenity to most Cherwell residents or damage the wider hotel and leisure business."

1.18 The new leisure opportunities provided by the Proposed Development are 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.

## Social benefits

1.19 There are currently very few jobseekers in Cherwell: only 65 people were seeking claiming Jobseeker's Allowance and actively seeking work in August 2019. However, the claimant count for this allowance is only a partial picture as it only includes those eligible for benefits and the local population is expected to grow significantly in the future. There is expected to be demand for local jobs for the following reasons:

- The claimant count excludes some groups of people even though they are actively seeking work, such as those aged under 18 or over 55, or a husband or wife whose partner is earning above a certain amount. It also does not consider people who are economically inactive, such as students, long-term sick and early retirees. Indeed, in contrast to the 65 people eligible for benefits who are looking for work, there are a further 4,400 Cherwell residents who are economically inactive (and therefore unable to claim benefits) but that are actually looking for a job. These 4,400 individuals account for 33% of economically inactive residents, which is higher than the shares across Oxfordshire (16%), South East (23%) and Great Britain (21%);
- Jobs at the Proposed Development are likely to appeal to young people and students: 42% of the Applicant's workers at existing resorts are under 22, with many in their first-ever job. Local young people (such as under 18s wanting part time work and students wanting to earn money to support their studies) are

seeking work but also 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. 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

- There are high levels of housing growth planned in Cherwell and Bicester in particular. Between 2017 and 2027, there is forecast to be 19,500 additional working age residents (18 to 64) in Cherwell, 13,100 of which are expected to live in Bicester. Cherwell is anticipating 2,300 additional 16 to 21 year old residents over the 10-year period, an increase of 26% compared to 17% across Oxfordshire. This means that, on top of the current demand for work, the need for jobs is likely to increase significantly over the next 10 years

1.20 This all suggests that there is not only existing demand for jobs in the local area but also that this demand is expected to grow significantly in coming years once the Proposed Development is operational. Based on the local employment profile of workers in the local area, the Proposed Development is expected to support 385 local jobs in Cherwell, with 13% residing in the rest of Oxfordshire.

1.21 In the draft Head of Terms, the Applicant has also committed to providing a minimum of 150 local construction apprenticeships or apprenticeship starts (in line with planning policy), working with local apprenticeships facilitator Ace Training. Great Wolf Resorts will also provide local recruitment initiatives during the operational phase and will work with specialist course departments at UK universities and colleges.

1.22 The Proposed Development will have a vibrant, youthful and inclusive staff culture, with clearly defined career progression opportunities. The Applicant's other resorts support a diverse workforce, with a mix of young, older, disabled and disadvantaged people in need of a job. The US resorts also support a high proportion of female workers, averaging 61% of the total workforce. The Proposed Development would create jobs and training opportunities for a range of local residents. This is consistent with the Oxfordshire Local Industrial Strategy[2], which aims to create *"longer and more flexible careers for older workers, and improved access to emerging jobs for younger people".*

1.23 The Proposed Development will also offer key skills, development and training opportunities, including at least 150 construction apprenticeships and lifeguard qualifications, which will help Cherwell residents upskill, aligned with the Cherwell Local Plan objective to *"increase skills"*. The Site 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[3] 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

[2] Oxfordshire LEP (2019) Oxfordshire Local Industrial Strategy
[3] Based on information provided by the Applicant that approximately 90% of roles will be front line positions

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.

1.24 The wages offered at the Proposed Development in the retail and accommodation and food sectors, as well as the managerial and sales occupations, will be competitive. The Proposed Development will therefore help residents increase their incomes, thus supporting better opportunities and quality of life.

1.25 Finally, 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".* 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.

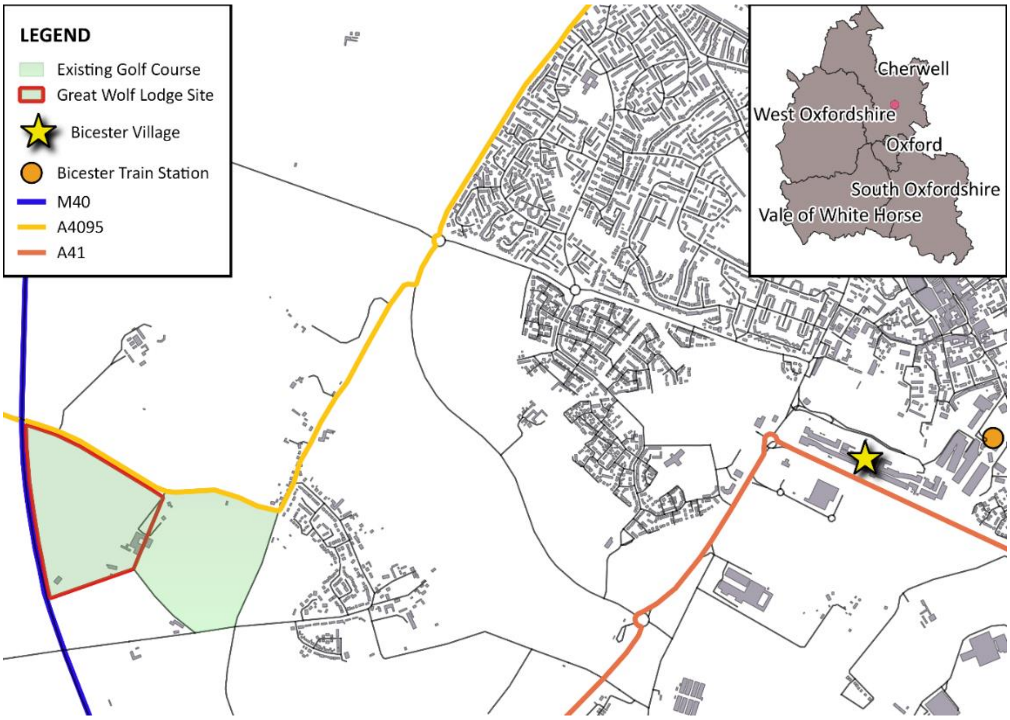
# 2 Introduction

2.1 This report provides an economic assessment of the proposed Great Wolf Lodge development in Chesterton, Bicester. Great Lakes UK Limited (the Applicant, also referred to as Great Wolf Resorts herein) own a family of indoor water park resort hotels, particularly popular as family getaways. The Applicant has 18 resorts around the US and are proposing to build their first UK lodge in Oxfordshire. As their first UK investment, this will be their flagship resort and base, with the intention of building their brand from here, and in time supporting further investment across the country.

## The Site

2.2 The Site is located on the southern part of Bicester golf course, in the Cherwell district of Oxfordshire, South East England. The Site is less than 3 miles from Bicester town centre and Bicester Village station. Bicester Village is an internationally renowned retail destination, with strong transport accessibility to Oxford and London.

Figure 1: Site location




*Contains OS data © Crown copyright and database right (2019)*

2.3 The Site currently comprises part of the Bicester Hotel Golf and Spa, which offers an 18 hole golf course with hotel and leisure facilities. The Proposed Development will not impact any of the hotel and spa land use but will result in the golf course being reduced from 18 to 9 holes. It is understood that there are to be no job losses at the Site as a result of the proposed changes.

## The Proposed Development

2.4 The Proposed Development is a new flagship 498-room, family orientated hotel with an indoor waterpark. The Proposed Development will be expected to cater to 500,000 visitors each year. Most of the accommodation will be provided in the form of family units, with 6 to 8 beds in each, with 10% of the bedrooms being accessible rooms. Room rates give visitors access to both the accommodation and the waterpark.

2.5 In response to feedback from local residents, the Proposed Development will offer day passes to the waterpark on a controlled basis. The number of these will depend upon bookings at the hotel – if there are more bookings at the hotel, fewer day passes will be available.

> Development description
>
> "redevelopment of part of golf course to provide new leisure resort (sui generis) incorporating waterpark, family entertainment centre, hotel, conferencing facilities and restaurants with associated access, parking and landscaping"

2.6 The Proposed Development will include a Family Entertainment Centre (FEC), containing attractions such as ropes course, climbing wall, family bowling, arcade games and an interactive 'mystical quest' game, along with a range of dining experiences. There will also be flexible conference facilities with access to an outdoor terrace and outdoor amenities, as well as six hectares of public parkland, including nature trails, accessible to hotel guests and the public.

2.7 The Proposed Development is a unique opportunity to bring Great Wolf Lodge's flagship resort to Cherwell. This report shows that the Proposed Development would bring significant benefits in terms of: attracting jobs, visitor spend and economic activity in Cherwell and Oxfordshire; transforming the quality and provision of the leisure offering; and supporting social benefits in terms of local jobs and training.

2.8 The remainder of this report is separated into the following sections:

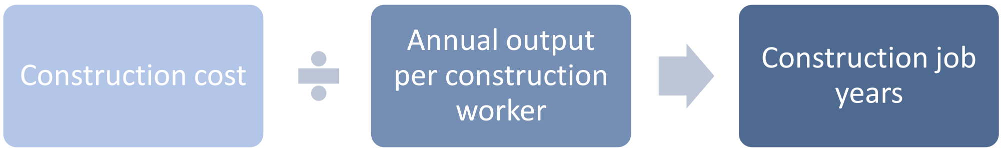
# Traditional Economic Assessment

# 3 Demolition and Construction

## Construction employment

3.1 The construction of the Proposed Development would result in additional economic activity in terms of construction employment. The standard industry method of estimating the number of construction workers onsite is to divide the expected construction cost of the Proposed Development by the GVA of the average construction worker[4].

Figure 2: Estimating construction jobs




3.2 It is estimated that a total of 1,890 gross construction job years would be created over a construction period of two years, equivalent to 190 FTE jobs being created. Alternatively, it is standard to present the average number of employees that would be expected to be onsite over the construction period – it is estimated that there would be an average of 945 workers on site over the 2 year construction period.[5]

3.3 During peak periods, the construction site will host more workers than at other times and workers will be required for different periods of time. Therefore, it is expected that there would be more than 945 people employed onsite at any one time during busy periods, but they would not all be employed onsite for the duration of the construction periods.

## Construction worker expenditure

3.4 Whilst the construction period is not expected to have large local impacts, the spending of those workers will be captured locally. It is expected that the construction workers will spend approximately £0.6m in the local area each year, equivalent to total expenditure of up to £1.3m over the duration of the construction period[6].

[4] ONS (2017) GVA (Income Approach); Business Register and Employment Survey (2017)

[5] This figure has also been adjusted to take into account specialist construction suppliers (such as waterslide manufacturers) as they would have a markedly different GVA and are unlikely to support employment directly onsite. The construction cost and resulting impacts have been reduced by 70% in order to reflect this and be conservative in this regard.

[6] Assuming 60% of workers spend £10.32 a day for 220 days a year. The £10.32 is based on a YouGov survey which found that UK workers spent £6 in the local area on average in 2005 – this has been uplifted to reflect earnings growth in the period to 2018 and the discrepancies between earnings in different industries. A 50% leakage was applied to the total spend to account for the lack of spend options at this particular site, and the current lack of transport links from the Site to nearby areas for potential spend such as Bicester.

# 4 Operational Employment

4.1 This section sets out the direct employment supported by the Proposed Development once operational, comparing it to the level of employment currently supported onsite. The following analysis uses employment densities from the Homes & Communities Agency[7] to estimate employment based on the proposed floorspace for different uses.

4.2 The proposed breakdown of floorspace by use class is shown in the table below.

Table 1: Proposed uses of the scheme: Gross Internal Area (GIA)

| | Proposed floorspace (sqm) |
|---|---|
| Guestrooms & Support | 27,250 |
| Lobby | 1,870 |
| Connector Zone | 970 |
| FEC Recreation | 2,770 |
| FEC Food & Beverage | 1,000 |
| Meeting / Banquet Rooms | 1,400 |
| Waterpark | 8,340 |
| **Total** | **43,610** |
| **Total including back of house** | **47,940** |

*Source: The Applicant. Figures have been rounded to the nearest 10sqm*

## Existing employment

4.3 The Site is part of the 18-hole Bicester Golf Course, which employs 8 FTEs and 2 hourly employees, and BHGS which employs 19 FTEs with 6 hourly employees. Hourly workers are part time workers, such as specialist instructors providing a yoga session for an hour. Overall, the current site is estimated to support approximately 25 FTEs in total.[8]

4.4 It is understood that that the reduction to 9-holes will not result in any job losses. 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.

## Direct employment

4.5 The Employment Density Guide offers an employment estimate based upon the floorspace use classes. However, given the diversity of use in the Proposed Development, it is more appropriate to provide a range between best and worst case than provide a single point estimate: [9]

[7] HCA (2015) Employment Density Guide Third Edition
[8] The total number of jobs on site is 35. This is converted into FTEs by applying the standard assumption that there are two part time jobs for every full-time job. According to the Business Register and Employment Survey (2018), 47% of Oxfordshire employees in Arts, entertainment, recreation & other services worked part time in 2018.
[9] HCA (2015) Employment Density Guide Third Edition

"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."

4.6 Table 2 shows the areas by use at the Proposed Development as well as the employment density used to estimate employment. It presents a low and high scenario based to reflect the uncertainty involved. Some of the uses can be clearly matched to densities within the guidance. For example, the employment for FEC food and beverage is calculated based on the employment density for restaurants and cafes. Other elements such as the Connector Zone and FEC recreated contain elements that could be any number of uses: Magic Goblin encounters (assigned amusement & entertainment centres), food and beverage outlets or Magic Quest (assigned both amusement and retail).

4.7 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 expert judgement, of the most realistic employment generation.

Table 2: Floorspaces of the Proposed Development and range of floorspace use assumptions

| | GIA (sqm) | NIA (sqm)* | Employment density applied | |
|---|---|---|---|---|
| | | | Worst case | Best case |
| Guestrooms & Support | 27,250 | n/a | 498 keys: mid-range hotel at *1 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 / Banquet Rooms | 1,400 | 1,200 | Managed workspace jobs *(47 max density NIA)* | Office jobs *(12 min density NIA)* |
| 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)* |

*Source: Volterra. Figures have been rounded to the nearest 10sqm. * NIA has been estimated by GIA*0.85 assumption due to lack of data*

4.8 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).

Table 3: Floorspace estimate of gross direct employment at the Proposed Development

| | FTEs | | Jobs | |
|---|---|---|---|---|
| | Worst case | Best case | Worst case | Best case |
| Guestrooms & Support | 165 | 165 | 215 | 215 |
| Lobby | 0 | 0 | 0 | 0 |
| Connector Zone | 10 | 45 | 15 | 60 |
| FEC Recreation | 35 | 130 | 45 | 175 |
| FEC Food & Beverage | 40 | 60 | 55 | 75 |
| Meeting / Banquet Rooms | 25 | 100 | 35 | 130 |
| Waterpark | 85 | 120 | 110 | 155 |
| **Total** | **365** | **625** | **470** | **810** |

*Source: HCA Additionality Guide (2014), Volterra calculations. Figures have been rounded to the nearest 5*

4.9 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 *conservative* estimate has been taken forward for the subsequent analysis.

4.10 The social benefits section considers the local jobs impact of the Proposed Development and the need for jobs locally.

## Additional direct employment

4.11 It is understood that the reduction to 9 holes will not result in any job losses. All direct employment is therefore expected to be entirely additional.

## Worker expenditure

4.12 The large number of workers at the Proposed Development will be expected to spend in the local area, supporting additional economic activity.

4.13 A 2005 YouGov survey found that workers in the UK spent on average £6 a day in the local area around their place of work. Uplifting this for earnings growth between 2005 and 2017, the higher earnings in Cherwell, and earnings differentials between different industries, it is estimated that employees onsite are expected to spend between £4.40 and £6.40 a day depending on their occupation. Assuming 60% of all workers spend this for 220 working days per year, this would equate to average annual worker expenditure of £313,000.

4.14 However, due to the relative lack of spending options within close proximity of the Site, it is likely that many workers will have their lunch at the Proposed Development or bring lunch from home. To be conservative, a 50% factor has been applied to the estimate to give an estimated annual local worker spend of c. £157,000.

4.15 Since there are no anticipated job losses at the Site as a result of the Proposed Development, this expenditure is expected to be entirely additional.

## Visitor expenditure

4.16 In addition to worker spend, the Proposed Development is expected to attract additional visitors who will support spend in the local area.

Table 4: 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)*

4.17 According to Destination Research[10], 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. Visitor expenditure is estimated based on the following assumptions[11]:

- 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 and 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 this will support expenditure in Oxfordshire, children 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.

4.18 These assumptions translate to an average spend per key of £36 per night in the Oxfordshire region outside the Proposed Development. Based on information provided by the Applicant, there are expected to be 498 units at 75% occupancy throughout the year. This equates to an average annual visitor spend of £4.9m on retail and food and beverage in the Oxfordshire area.

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[10] Destination Research (2018) The Value of Tourism in Oxfordshire in 2017

[11] It has also been assumed that:

1) Visitors to the Proposed Development will spend the same proportion of their total expenditure on accommodation, shopping, food & drink, and attractions as staying visitors;
2) 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 visitor's 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 & drink;

# 5 Gross Value Added and Tax

## Gross value added

5.1 GVA is the additional value generated from economic activity. The GVA impact of the Proposed Development has been calculated by multiplying the number of jobs in each sector by the annual GVA per job in that sector.

5.2 This results in an estimate that workers at the Proposed Development are expected to generate an additional £22.8m in GVA each year.

## Tax revenue

5.3 By comparing national statistics on GVA in the years 1997 to 2017[12] with public sector receipts in each year[13] it can be estimated that tax revenues typically account for between 30% and 40% of GVA. Based on this, the table below shows that the Proposed Development is expected to generate between £6.8m and £9.1m in additional tax revenues per year.

Table 5: Annual tax revenues

| Tax (30%) | Tax (40%) |
|---|---|
| £6.8m | £9.1m |

*Source: Volterra calculations*

### Business rates

5.4 The VOA[14] lists the rateable value of the existing golf course as £325k. Based on the large business multiplier of 0.504, the current business rates paid by the course is estimated to be £164k. In 2017/18, Cherwell District Council (CDC) retained 40% of business rates paid[15]. From business rates paid at the golf course, this would equate to approximately £65,600. The rateable value of the golf course is linked to the building from which the golf course is run, rather than to the area of the golf course. Therefore, the proposed decrease from 18 holes to 9 holes is not expected to affect the business rates contribution of the golf course.

5.5 Due to the unique nature of the Proposed Development, it has not been possible to robustly estimate the likely business rate contribution. However, it is expected to be a significant uplift compared to the existing site, and will result in considerable business rates paid, both in total and the proportion that is retained by CDC. Since reduction in golf course space is not expected to have a significant impact on the business rate contribution of the site, the business rates revenue resulting from the Proposed Development is expected to be entirely additional.

[12] ONS (2019) Gross Value Added (Income Approach)
[13] ONS (2019) Public Sector Finances
[14] Business premises and business rates, Valuation Office Agency, 2019
[15] MHCLG (2019) Business Rates Received by Councils 2017-18

# 6 Total Net Additional Employment

6.1 The previous analysis has dealt with the gross jobs estimated for the Proposed Development and how these compare to jobs at the existing development. To present the net additional impact of the development, displacement and multiplier impacts must be accounted for.

6.2 The Homes and Communities Agency (HCA) Additionality Guide[16] provides a framework for the estimation of net additional impacts of an intervention:

The proportion of gross additional employment generated by the scheme which would have happened without the scheme, known as **displacement** (a negative impact applied to the gross figure).

Given that this is a new leisure offer, unlike anything in the area, it will attract new visitors and spending to the area.

Any employment resulting from additional local spending by employees of the scheme or local supplier purchases, known as a **multiplier** (a positive impact applied to the net direct figure).

Research on tourism expenditure in Oxfordshire found a jobs multiplier of 1.29. This is in line with the HCA guidance of a low-level regional multiplier of 1.3, and implies relatively low propensity for local spend and low strength of local supply chains.

6.3 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 & beverage by visitors to the Proposed Development is therefore expected to generate additional employment. This is estimated by dividing the visitor spend by the GVA per worker in the retail and food and beverage industries (approximately £42,000 per worker[17]). In these industries, 40% of workers are part time, which is applied to the FTE estimate to generate the estimated number of jobs.

[16] Homes and Communities Agency Additionality Guide, 2014

[17] GVA income approach, Business Register and Employment Survey, 2017. This figure is for Oxfordshire region, in the distribution, transport, accommodation and food industries; the closest match for which data is available.

Figure 3: Calculating total net additional employment


6.4 It is estimated that this scheme will generate a total net additional employment benefit of 540 FTEs in Oxfordshire, which equates to approximately 700 jobs after part time workers are taken into account.

Table 6: Additional employment generated by the scheme in Oxfordshire

| | FTEs | Jobs |
|---|---|---|
| Gross | 460 | 600 |
| *Employment impacts* | | |
| Net direct (after 25% displacement) | 350 | 450 |
| Net indirect and induced (from worker spend multiplier) | 100 | 130 |
| ***Total net additional (associated with the employees)*** | ***450*** | ***580*** |
| *Visitor spend impacts* | | |
| Net induced | 90 | 120 |
| **Total net additional FTEs in Oxfordshire** | **540** | **700** |

*Source: Volterra calculations. Figures have been rounded to the nearest 10*

# The Need for Tourism and Leisure

# 7 The Need for Tourism and Leisure

## The importance of tourism and leisure in Oxfordshire

7.1 A report by Deloitte[18] estimated that the UK leisure sector had turnover of £117.4bn in 2014, up 5% since 2010. Within this, visitor attractions and other cultural activities (including amusement parks) were estimated to be worth £4.2bn, growing 8.4% since 2010. The report notes that leisure spend has grown at a faster pace than total consumer expenditure.

7.2 A 2018 report by Destination Research showed the importance of tourism in Oxfordshire[19]. In 2017, 29.8m tourism trips were made, 27.1m of which were day trips. These visitors contributed a direct spend of £1.7bn and an indirect/induced spend of £460m, generating a total tourism value of £2.2bn. The economic activity supported 36,900 tourism-related jobs (equivalent to 26,900 FTEs), which accounted for 10% of all Oxfordshire employment – a significant contribution.

7.3 These metrics have been growing at a steady rate since 2015, as shown in the table below. Between 2016 and 2017, the number of trips to Oxfordshire grew by 6%. This can be compared to a reduction in tourism day visits and overnight trips in the South East.[20]

Table 7: Growth in Oxfordshire tourism impacts, 2015 to 2017

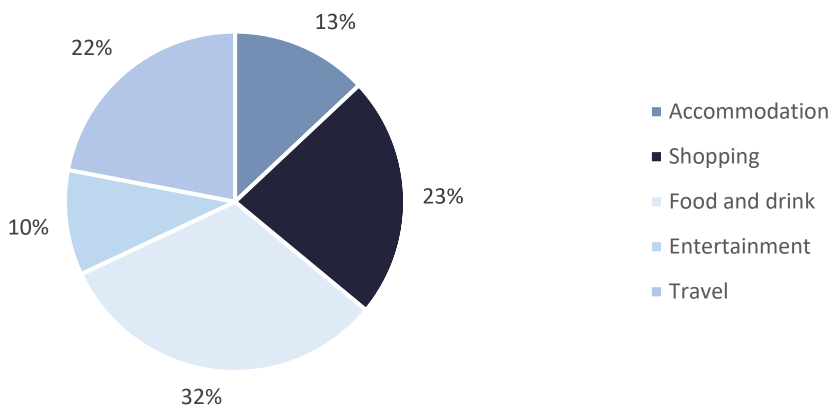
| | 2015 | 2016 | 2017 | Compound annual growth rate |
|---|---|---|---|---|
| Trips | 26.6m | 27.6m | 29.9m | 6% |
| Total value (direct, indirect and induced spend) | £2.0bn | £2.0bn | £2.2bn | 5% |
| Tourism related jobs | 33,400 | 34,900 | 36,900 | 5% |

*Source: Destination Research, 2017 and 2018*

7.4 According to the research, almost a third (32%) of the total £1.7bn of tourist spending in Oxfordshire was on food and drink and 23% was on shopping (Figure 4). Attractions/entertainment accounted for 10% of tourist expenditure. Whilst this is the smallest segment of the expenditure, it is still worth a significant £181m.

[18] Deloitte (2016) Passion for leisure A view of the UK leisure consumer
[19] Destination Research (2018) The Value of Tourism in Oxfordshire in 2017
[20] Destination Research (2018) The Value of Tourism in Oxfordshire in 2017

Figure 4: Breakdown of tourist expenditure in 2017




*Source: Destination Research, 2018*

7.5 According to the GB Day Visitor Survey, there were c.2.1m day trips to Cherwell in 2017, accounting for 8% of total day trips in Oxfordshire. However, as identified by Destination Research, this does not include visits to Bicester Village (of which there were 6.6m in 2017). Whilst some of these individuals would be undertaking linked trips to Cherwell, and so would be captured within the 2.1m day trips, the majority of those 6.6m visits are completely additional to the 2.1m, suggesting that the 2.1m is a significant underestimate of tourism in Cherwell. The district is therefore a key part of tourism within the county.

### Domestic tourism

7.6 According to Visit Britain[21], domestic tourism in Britain supported £70bn of domestic spend and 2.6m jobs in 2017. Domestic overnight holidays are a key driver of recent large growth in the domestic tourism sector, which recently benefited from the 'staycation boom'. There was a rise in domestic holiday trips of 6% (to 47.2m trips) between 2016 and 2017, compared to growth of 4% in overseas trips among UK residents.[22]

7.7 Domestic overnight trips increased by 1% between 2016 and 2017 and by 3% in the first six months of 2018. The growth of the 'staycation' is also noted in the Travelodge annual holiday index[23], which reported that between 2011 and 2019, the percentage of Britons taking staycations has increased from 35% to 69%, and that the total benefit of staycation spend to the UK tourism industry has increased from £7.2bn to £40bn over the same period.

7.8 According to Visit Britain, the number of short breaks (between 1 and 3 nights) was up by 7% between 2016 and 2017, with longer breaks (over 4 nights) growing slower at 3%. These trends are echoed by the Travelodge Holiday Index, which revealed that, in 2019, 85% of Britons planned on splitting up a traditional two-week holiday into three short breaks throughout the year.

[21] Visit Britain (2019) Annual Review 2017/18 England's Domestic Tourism Performance.
[22] ONS (2019) UK residents' holiday visits overseas by duration, against age group, mode of transport, booking, travel type and world region visited, 2014 to 2018
[23] Travelodge (2019) annual Travelodge holiday Index

7.9 The annual Travelodge Holiday Index stated that, "this year, 58% of adults have opted to holiday at home due to Brexit uncertainties and are showing their solidarity by supporting UK tourism and their economy."

## The contribution of the Proposed Development to leisure and tourism

### Increasing tourism for Cherwell and Oxfordshire

7.10 Increasing tourism can have significant economic benefits in terms of visitor expenditure and induced employment. Attracting visitors to the Proposed Development would also be expected to have wider benefits in Oxfordshire through increasing spend at other local attractions.

7.11 One of the ways in which an area can increase its tourism catchment is by increasing the variety of attractions on offer. Prospective tourists all have different interests and tastes, so they have different tourist demand profiles. The Proposed Development would be unique to Cherwell and Oxfordshire and is likely to attract new types of tourists, such as families with young children, to the area when they otherwise would not have been incentivised to go there.

7.12 A report from Leisure Development Partners provides some evidence for this based on the Applicant's resorts in the US.[24] It highlights the importance of the Proposed Development's indoor and accommodation offer:

> "a new, high quality indoor waterpark product has emerged in the formerly under-developed northern US markets. These parks have seen more intense experiences and better presentation within an indoor park setting (often associated with accommodation). The ability to mitigate against poor weather while still providing a compelling product has opened up new markets. This new breed of indoor park is often built as a core component of resort hotels. Located primarily in the Wisconsin dells (Great Wolf etc.) these waterpark hotels have successfully driven tourism and established new weekend destinations that cater to regional residents as well as corporate groups."

7.13 The report discusses the likely visitor penetration of indoor waterparks, as summarised in Table 8. It notes that the primary resident market (0-60 mins drive time) penetration is by far the highest of any market segment. Two indoor waterparks which performed well achieved around 15% market penetration of the primary market. One of these is a large waterpark with significant investment (albeit somewhat dated) and the other is in a modest market with limited competition (as is the case with the Oxfordshire primary market).

7.14 For the secondary market (60-120 mins drive) there is a reduction in penetration for the majority of parks, which is a result of the increase in drive time. Most parks achieve between 0.5% and 5.0% secondary market penetration – several achieve 2%-3%.

7.15 Whilst the report finds that tourism penetration is often modest, penetration rates among the indoor waterpark hotel examples, such as Wisconsin Dells and Alton Towers, tend to attract more tourists as they are the tourism driver for the local area.

[24] Leisure Development Partners (2014) Scarborough Waterpark Feasibility Study

These resorts that provide waterparks with linked accommodation, such as the Proposed Development, tend to attract higher market penetration, including tourism trips, as shown in the last row of the table below.

7.16 The examples show that there are precedents with similar developments attracting tourism. This shows the potential of the Proposed Development to attract significant numbers of tourists to Cherwell and Oxfordshire, adding to the significant tourism economy already in the area.

7.17 The market catchment for the Proposed Development is expected to be significantly larger than the existing golf course. A report by CBRE[25] notes that the typical member of a golf club lives within a 20 to 30-minute drive. The report finds that the membership distribution for the BHGS also broadly fits within this travel time, with some members travelling further. The majority (73%) of members live within Cherwell district. The number of members and users at BHGS is confidential so is not disclosed. The report does however note that the golf course is providing amenity to a very small proportion of the total population of Cherwell. All of this suggests the penetration of the existing golf course is largely in the primary catchment and is very low.

7.18 However, as shown below, the likely catchment of the water park at the Proposed Development would be larger, attracting users from the secondary market and potentially even further afield.

Table 8: Market penetration for selected indoor water parks

| | Primary (0-60 mins) | Secondary (60-120 min) | Domestic (0-60 min) | International |
|---|---|---|---|---|
| Max | 15.2% | 12.6% | 2.8% | 0.9% |
| Min | 1.5% | 0.4% | 0.1% | 0.0% |
| Median | 5.1% | 1.3% | 0.6% | 0.0% |
| Average | 6.7% | 2.5% | 1.0% | 0.2% |
| Resort water parks | 12-15% | 4-6% | 0-5% | 7-11% |

*Source: LDP*

7.19 This aligns with the conclusions of the Planning Statement, which finds that the offer, experience and target audience to all parts of the resort, including the conferencing facilities that typically relate to the wider resort offer, is different to that of other hotels and / or resorts in the local area. The Proposed Development is therefore sufficiently different from existing tourism businesses in the local area, and so is expected to have negligible to no impacts on local centres.

7.20 The increase in tourism directly responds to the Cherwell Local Plan[26] objective SO 5:To encourage sustainable tourism, with the supporting 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."

[25] CBRE (2019) Desk Based Golf Needs Study
[26] Cherwell District Council (2016). Cherwell Local Plan 2011-2031. Objective SO 5 and Policy SLE 3

7.21 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. Whilst the Proposed Development would not directly meet this need, it does indicate that there is demand for similar facilities in the local area.

7.22 The Proposed Development is considered to be a 'main town centre use' according to the National Planning Policy Framework (NPPF) [27]. 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.

7.23 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.[28] Even after demonstrating high flexibility in their requirements, such 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 for more detail).

## Golf market trends

7.24 The Proposed Development would result in the loss of the nine-hole golf course space, decreasing the existing golf course from 18 to 9 holes, reducing local golf provision. This sub-section summarises the golf market trends in the local area and the need for golf courses to understand the likely impact of the loss of golf course.

7.25 CBRE[29] notes 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 in England 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%; and
- Several new formats have been trailed 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

[27] Ministry of Housing, Communities & Local Government (2019) National Planning Policy Framework.
[28] DP9 (2019), Proposed Great Lodge, Chesterton, Bicester. Planning Statement, Appendix 3
[29] CBRE (2019) Desk Based Golf Needs Study

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. It also identified that among 25-44 year olds who are unhappy with the pace of play, 21% would like to see the playing time reduced by as much as one and a half hours, while 19% said they would welcome the opportunity to play nine holes more often as an alternative format.

7.26 Different membership models, such as flexible memberships and points-based memberships, are being offered in an attempt to attract greater participation from those who are not willing or able to financially commit to the traditional strict membership contracts, or who would like to play on multiplier courses.

### Local golf club provision

7.27 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.[30] 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."

7.28 CBRE looked at golf provision based on both distance from the site and drive time. 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.

7.29 The distribution of golf provision in Cherwell means that everyone with access to a car can reach a course within a 20 or 30 minute drive time, which is considered by CBRE to be a reasonable drive time. 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 and there is no dedicated 9-hole format provision within this key drive time.

Table 9: Golf course supply within a 30-minute drive of the Site

| | 20 minutes | 30 minutes |
|---|---|---|
| 27 hole + | 1 | 2 |
| 18 hole | 4 | 14 |
| 9 hole | 0 | 3 |
| **Total number of courses** | **5** | **19** |

*Source: CBRE (2019)*

### Local golf demand and supply

7.30 The CBRE report notes that the area is expected to have strong demand for golf given its affluent south east England location and strong male over 60 representation, which is the key golfing demographic and is growing at a faster rate in Cherwell than general

[30] Cherwell District Council (2018) Open Space, Sport and Recreation Assessment and Strategies. Part 2: Sports Facilities Strategy Executive Summary, August 2018

population growth. Examination of the average participation in the region supports this: 18.18 per 1,000 inhabitants participate in golf in Cherwell compared to 9.93 inhabitants across the UK.

7.31 However, it was reported that in 2016, Cherwell only had an average of 385 members per club, in keeping with its surrounding local authorities but far lower than the England average of 460. CBRE 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."

7.32 The Open Space, Sport and Recreation Assessment and Strategies for Cherwell identified that there is forecast 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.

7.33 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.*

7.34 [The] 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."

7.35 Table 10 shows the demographic profile in Cherwell of two key groups: the key golfing demographic (over 60 males) and the key demographic of the Proposed Development (under 10 children). It shows that the local market for the Proposed Development is slightly larger than the golf market, which suggests that the Proposed Development is better serving the needs of a larger proportion of the population. Given that there will still be golf provision on site to serve this population, and a small proportion of Cherwell's residents are members of the club, the analysis below suggests that the Proposed Development might be a more inclusive use the of the space.

Table 10: Demographic comparison, Cherwell – golf vs waterpark

| | | 2016 | 2021 | 2026 | 2031 |
|---|---|---|---|---|---|
| Under 10 | number | 19,122 | 21,780 | 24,809 | 27,078 |
| | % of total | 12.9% | 12.5% | 12.9% | 13.1% |
| Over 60s | number | 33,708 | 39,823 | 47,263 | 53,827 |
| | % of total | 22.7% | 22.8% | 24.6% | 26.0% |
| Male 60+ | number | 16,658 | 19,680 | 23,373 | 26,619 |
| | % of total | 11.2% | 11.3% | 12.2% | 12.8% |
| **Total population** | | **148,276** | **174,859** | **191,778** | **207,408** |

*Sources: CBRE; and Cherwell District Council, Open Space, Sport & Recreation Assessment and Strategies*

### Bicester Hotel, Golf Club and Spa

7.36 The CBRE report considered the situation at BHGS which would be reduced from an 18-hole to a 9-hole course as a result of the Proposed Development. The key conclusions are:

- "The golf course is providing amenity to only a very small proportion of the total population of Cherwell and the wider area";
- "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";
- "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"; and
- "Loss of 9 holes of golf from BHGS is therefore unlikely to constitute a material loss of amenity to most Cherwell residents or damage the wider hotel and leisure business".

## Conclusions

7.37 Overall, it is considered that the change in leisure provision associated with the Proposed Development would result in significant net economic benefits.

7.38 The Proposed Development would result in a step change in leisure provision in Cherwell and Oxfordshire, offering unique provision 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. The Proposed Development would also better serve the needs of a larger proportion of the Cherwell population.

7.39 This is expected to outweigh any negative impacts from the loss of golf course space, which, in the context of falling membership, existing provision, and golf trends, is not expected to have a significant effect on the local area.

# Social Benefits

# 8 Social Benefits

8.1 The Proposed Development is expected to support 600 jobs. These will be across a range of job types and occupations including approximately 5% management and director roles, 6% supervisors and leads and 89% front line positions[31]. The Applicant's other resorts support a diverse workforce – they are an inclusive employer supporting a mix of young, older, disabled and disadvantaged people in need of a job. The US resorts also support a high proportion of female workers, averaging 61% of the total workforce. The Proposed Development would create jobs and training opportunities for a range of local residents.

8.2 This section considers how many of these jobs will benefit Cherwell and Oxfordshire residents and whether there is a need for these jobs in these areas. It also details the training opportunities offered by the Proposed Development, and other community initiatives that the Applicant has implemented elsewhere.

## The need for local jobs

### Cherwell labour market

8.3 There are currently very few jobseekers in Cherwell. In August 2019, there were only 65 people claiming benefits and there have been less than 100 claimants since January 2019. Only 0.1% of Cherwell's economically active residents are claiming benefits, on par with Oxfordshire and far below the South East (0.4%) and Great Britain (0.6%). This is a similar pattern to that of January 2013, where Cherwell and Oxfordshire had similar rates (1.8% and 1.9% respectively), far below the South East (3.0%) and Great Britain (4.8%). All geographies have experienced dramatic decreases in claimants and claimants per economically active residents since January 2013.

Table 11: Claimants in August 2019

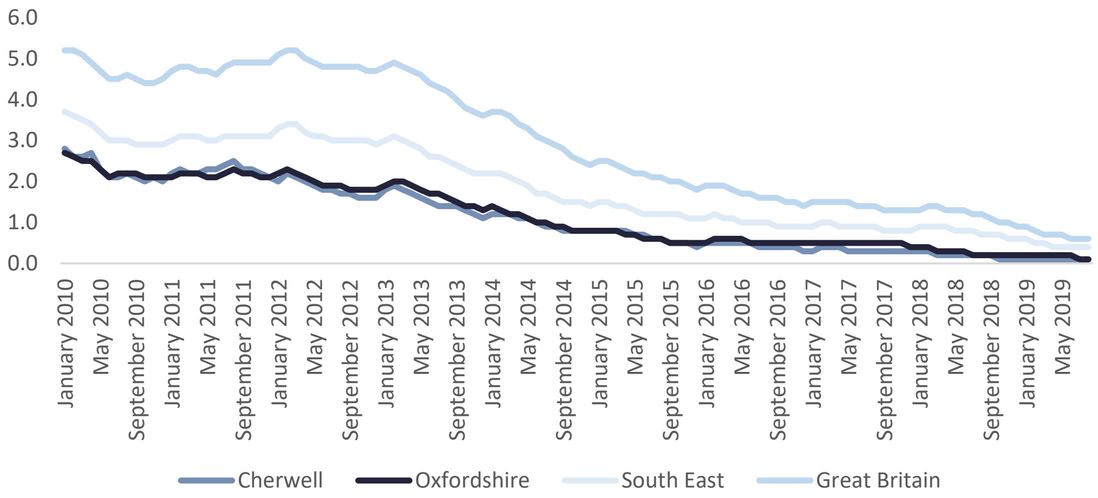
| | August 2019 | | January 2013 | |
|---|---|---|---|---|
| | Claimants | Proportion of economically active residents (%) | Claimants | Proportion of economically active residents (%) |
| Cherwell | 65 | 0.1 | 1,411 | 1.8 |
| Oxfordshire | 514 | 0.1 | 6,842 | 1.9 |
| South East | 16,491 | 0.4 | 137,436 | 3.0 |
| Great Britain | 189,805 | 0.6 | 1,515,843 | 4.8 |

*Source: Jobseekers Allowance, 2019*

8.4 Figure 5 shows the rate of claimants has fallen significantly since the start of 2010. The improvement is partly due to the improvement in the overall economy over this period but also due to methodological changes over this time, which are not discussed here.

[31] Based on information provided by the Applicant

Figure 5: Claimants per economically active residents January 2010 to August 2019




*Source: Jobseekers Allowance, 2019*

8.5 These statistics may initially indicate that there are few local people in need of the job opportunities that the Proposed Development will offer. However, the claimant count is only a partial picture as it only includes those eligible for benefits. The claimant count excludes groups even though they are actively seeking work. These groups include:[32]

- A husband or wife whose partner is earning above a certain amount – JSA is means tested on partner's income and (after six months) on savings;
- People aged under 18;
- People who cannot or are not willing to claim benefits at the job centre; and
- People aged over 55.

8.6 Economic inactivity can also influence levels of unemployment. The economically inactive are those defined to have left the labour force – they are not classified as working or unemployed and can include long-term sickness, disability, students and early retirement.[33] However, many of these economically inactive people could enter the workforce. By excluding them from unemployment statistics, they are not targeted by active labour market policies. At the national level, if these economically inactive people were added to the official unemployment estimates, overall unemployment increases from 4.6% to 13.2%[34].

8.7 In 2018, there were 13,300 economically inactive Cherwell residents, 4,400 of which want a job. These residents do not qualify to claim jobseekers as they are not officially

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[32] https://www.economicshelp.org/blog/8/unemployment/the-true-level-of-unemployment-in-uk/

[33] Economics Help notes that: "*In recent years there has been a marked increase in the number of people receiving sickness or disability benefits. These people used to be employed, but, for various reasons are no longer able to work. Rather than be classed as unemployed they have effectively left the labour force. In one sense they are not unemployed because they are not seeking work. However, on the other hand, you could argue this economic inactivity is a type of unemployment. Perhaps under different circumstances, they could be working. Often sickness benefits disguise the extent of unemployment in certain areas. For example, many former miners were given sickness benefits, rather than be classed as unemployed when the mines closed down.*"

[34] Centre for Cities and OECD (2019), Where are the missing workers? Economic inactivity in UK cities. Retrieved from https://www.centreforcities.org/publication/hidden-unemployment-in-uk-cities/?utm_source=Centre+for+Cities+Newsletter&utm_campaign=66592cba95-EMAIL_CAMPAIGN_2018_12_19_09_47_COPY_01&utm_medium=email&utm_term=0_2a9c9d5ef9-66592cba95-131158541&mc_cid=66592cba95&mc_eid=ec29089b8e Accessed October 2019

unemployed[35], yet they are looking for work. The number accounts for 33% of economically inactive residents, far higher than the Oxfordshire (16%), South East (23%) and Great Britain (21%) figures. In other words, there is a relatively higher proportion of economically inactive people in Cherwell who are actually seeking work than in other areas. Furthermore, this number has increased by 2,000 in the past year in Cherwell, compared to decreases in all other geographies over the same time period.

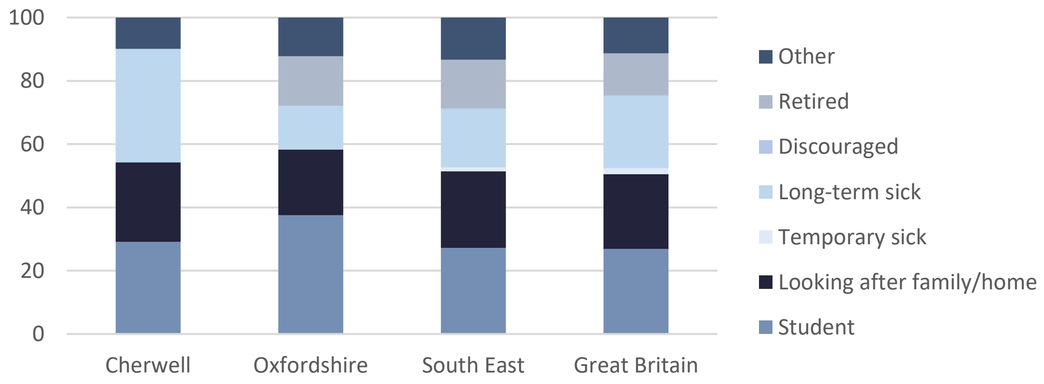
Table 12: Economically inactive who want a job

| | Cherwell | Oxfordshire | South East | Great Britain |
|---|---|---|---|---|
| 2018 | | | | |
| Economically inactive | 13,300 | 71,800 | 1,065,300 | 8,624,100 |
| Number who want a job | 4,400 | 11,200 | 241,200 | 1,796,000 |
| % who want a job | 33% | 16% | 23% | 21% |
| 2017 | | | | |
| Economically inactive | 11,100 | 64,700 | 1,031,900 | 8,644,300 |
| Number who want a job | 2,400 | 13,100 | 248,200 | 1,963,900 |
| % who want a job | 22% | 20% | 24% | 23% |

*Source: Annual Population Survey 2017 to 2018*

8.8 In Cherwell, 3,900 of the 13,300 economically inactive residents were students, 3,300 were looking after their family or home and 4,800 were long-term sick. The latter two categories – people who are looking after family/home and the long-term sick – had increased by 1,000 and 2,800, respectively, between 2017 and 2018. This suggests that these two groups are driving increases in the number of economically inactive people searching for work.

Figure 6: Economic inactivity by reason, 2018




*Source: Annual Population Survey 2018; Volterra calculations*

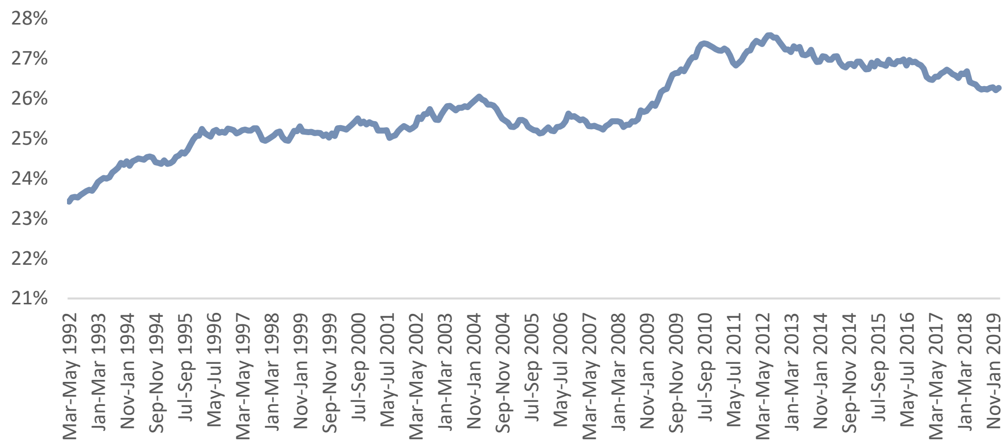
[35] To be counted as unemployed, and so economically active, people must be without a job who were available to start work in the two weeks following their interview and who had either looked for work in the four weeks prior to interview or were waiting to start a job they had already obtained. People out of work who do not meet these criteria are classed as economically inactive but may still state that they want to work. For example, someone may not be actively seeking work because they were temporarily sick or injured.

8.9 Further afield, as shown above, there are also people seeking work in Oxfordshire, who would be expected to work at the Proposed Development.

### Labour market trends and different working patterns

8.10 People are no longer working the classic '9-5', five days a week. Instead, workers are taking advantage of the increase in options for flexible work over recent years. These offerings range from working fewer hours, working flexible hours, to working four-day weeks. According to research by CIPD[36], part-time work is the most prevalent form of flexible work offerings. The series below shows that, despite a slight decline since 2012, there has been an overall increase in part-time work in the UK since c. 2000. Part-time workers now make up 26% of total workers in the UK.

Figure 7: Proportion of those in employment working part-time, UK, 1992-2018




*Source: Labour force survey: employment and employee types, 1992 to 2018*

8.11 The table below shows that 58% of Cherwell retail employees worked part time in 2018, on par with Oxfordshire (57%), the South East (60%) and GB (58%). The majority (59%) of employment in accommodation and food services in Cherwell worked part time, slightly higher than the Oxfordshire (54%), South East (56%) and GB (56%) averages. Of Cherwell employees in arts entertainment, recreation and other services, 43% worked part time, lower than the Oxfordshire (46%), South East (50%) and GB (48%) averages.

8.12 Across most industries presented below, the proportion of employees that work part time has increased slightly since 2009, ranging from 1 to 7 percentage point (pp) increases.

[36] CIPD (2019), Megatrends report: flexible working

Table 13: Percentage of employees that are part time in relevant industries

| | Cherwell | Oxfordshire | South East | Great Britain |
|---|---|---|---|---|
| Retail | | | | |
| 2018 | 58% | 57% | 60% | 58% |
| 2009 | 55% | 54% | 55% | 57% |
| Accommodation and food services | | | | |
| 2018 | 59% | 54% | 56% | 56% |
| 2009 | 53% | 55% | 54% | 57% |
| Arts, entertainment, recreation and other services | | | | |
| 2018 | 43% | 46% | 50% | 48% |
| 2009 | 45% | 45% | 43% | 45% |

*Source: Business Register and Employment Survey, 2019*

### Student jobs

8.13 The Applicant has reported that their resorts in the US are successful in partnering with local universities, offering students part time work in the summer – when students are on their breaks and during the busy period of the resort. The Applicant has indicated that they will work with local education providers to offer employment to their students at the Proposed Development.

8.14 Student demand for part time work has been increasing in recent years. Research by Endsleigh and the National Union of Students in 2015[37] suggested that the proportion of university students who worked during their degree was 77%, an increase from 59% in the previous year. 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. The offering at the Proposed Development would accommodate both these incentives, given good pay and training opportunities for workers.

8.15 However, young people are finding it harder to get jobs. They have little to no experience which lessens their competitiveness against other applicants[38]. They also often have school or university commitments so need jobs which work around those hours. At the same time, as discussed above there is increasingly a workforce with increased availability and/or a wish for flexibility. As a result, there are now more workers in their 20s and 30s available for flexible working, meaning employers have less reason to 'risk' employing a younger worker[39]. Additional options for part-time employment is therefore important for extending opportunities to young people.

8.16 For young people who are keen to build their experience and CV, the lack of options might force them to accept unpaid internships. These can cost the person hundreds of pounds in rent, food and travel expenses, putting them at a financial disadvantage.

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[37] Increase in university students 'working to fund studies', 2015, retrieved from https://www.bbc.co.uk/news/education-33843987 May 2019

[38] Mum, it's not easy to 'just get a job', 2014, retrieved from https://www.theguardian.com/education/2014/jul/10/summer-part-time-job-students-hard May 2019

[39] The decline of the student summer job, 2018 retrieved from https://www.ft.com/content/0cf64240-93d9-11e8-b747-fb1e803ee64e May 2019.

8.17 In terms of potential labour supply, there are two main universities near the Proposed Development: the University of Oxford and Oxford Brookes. The University of Oxford does not permit term-time employment of undergraduate students, and states that holiday work should not take priority over the academic work that the students are set over the semester breaks[40]. Therefore, the Proposed Development can expect to see limited demand from students at this university.

8.18 In 2017/18, Oxford Brookes had 13,120 undergraduate students, 8,245 of which were in years other than their first year[41]. It is expected that first years mostly live in university accommodation which is not available to them over the summer since the University requires them to move out so that the rooms can be rented out to tourists, visiting researchers etc. Students in other years, however, are more likely to be committed to 12-month rental contracts in nearby areas, and so will have accommodation close to the Site over the summer peak period. These students may therefore be more likely to stay in the area over the holidays and to be seeking employment locally.

8.19 Should the recruitment of local students be successful, the workers should find the employment feasible in terms of travel to work. Most university students will be living in Oxford. It is only a 13 minute train journey from Oxford Station to Bicester Village station and shuttle bus service will be available to workers, with several pick up points in Bicester.

### Future growth

8.20 There is forecast to be high levels of growth in the Cherwell and Oxfordshire area. These new residents will create additional demand for jobs in the area.

8.21 According to Oxfordshire County Council[42] (OCC), there were 147,600 Cherwell residents in 2017 and this is expected to grow by 34,300 (23%) to 181,900 by 2027, faster than the 20% growth expected across Oxfordshire. Of the 34,300 additional Cherwell residents expected over the 10-year period, 20,600 (60%) are expected in the Bicester area and 5,800 of these are expected in the Middle Super Output Area (MSOA) where the Site is located. The expected 10-year population growth of both Bicester and the MSOA (40% and 53% respectively) is far higher than the Oxfordshire average of 20%.

8.22 Across most geographies, the working age population (aged 18 to 64) is expected to grow slightly slower than total population. However, the working age population in Bicester is set to grow c. 1% faster than the total population, with 13,100 additional working age residents expected over the 10-year period. This accounts for 67% of working age population growth in Cherwell. Of the 9,200 additional Oxfordshire residents who are of a young working age (aged 16 to 21), 25% are expected in Cherwell over the 10-year period.

[40] Skills and work experience, Oxford University, retrieved from https://www.ox.ac.uk/students/life/experience?wssl=1 May 2019

[41] HESA, HE student enrolments by HE provider, domicile, level of study, mode of study, first year marker, sex and academic year, 2017/18

[42] Oxfordshire County Council (2019) 2017 to 2027 housing-led forecasts for districts and MSOAs

Table 14: Population growth projections in Oxfordshire 2017 to 2027

| | All ages | | 18 to 64 | | 16 to 21 | |
|---|---|---|---|---|---|---|
| | Growth | % growth | Growth | % growth | Growth | % growth |
| Site MSOA | +5,800 | 53% | +3,400 | 50% | * | * |
| Bicester | +20,600 | 40% | +13,100 | 40% | * | * |
| Cherwell | +34,300 | 23% | +19,500 | 22% | +2,300 | 26% |
| Oxfordshire | +134,800 | 20% | +74,900 | 18% | +9,200 | 17% |

*Source: Oxfordshire County Council, 2019. * data not available*

8.23 According to Growing Bicester[43], much of the Bicester population growth will be within areas very accessible to the Site. North West Bicester, the world's first eco town, Graven Hill and South West Bicester (Kingsmere) are expected to accommodate c. 8,500 homes (of 10,000 planned) between them, and all are within a 15-minute walk of Bicester Village station. With the shuttle bus, this could put many of these residents within a 30-minute commuter radius, on par with South East standards where 70% of workers take under 30 minutes to travel to work[44].

8.24 Growing Bicester also expects approximately 18,500 new jobs up to 2031 in Bicester. Growing Bicester has anticipated the industries which these new jobs will be in: the majority are expected to be in office (B1), industrial (B2) and storage/distribution (B8) uses. The North West Bicester site (3,000 jobs by 2031) is the only one which is expected to have any shops (A1), restaurants/cafes (A3), hotels (C1) or leisure (D2) uses. Therefore, residents looking for work in these industries have limited employment options based on the Growing Bicester strategy. The Proposed Development could offer these residents a suitable employment opportunity.

### Impact of the Proposed Development

8.25 It is important that any new developments benefit local residents. The number of local jobs can be estimated using commuting patterns data from the Census (2011), which is the most up to date source.

Table 15: Local employment (2011)

| | Commute to local area | FTEs | Jobs |
|---|---|---|---|
| Cherwell | 64% | 295 | 385 |
| Rest of Oxfordshire | 13% | 60 | 80 |
| Rest of England and Wales | 23% | 105 | 140 |
| **Total** | **100%** | **460** | **600** |

*Source: Census (2011). Totals may not sum due to rounding.*

8.26 Based on this, 64% of workers in the local area LSOA are expected to live in Cherwell and 13% in the rest of Oxfordshire. 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.

[43] Growing Bicester, 2019 retrieved from http://growingbicester.co.uk/homes/
[44] Labour Force Survey (2018) Commuting to work by gender, UK country and region October to December 2017 Table 3 Time taken to travel to work

8.27 Unemployment rates are low in Cherwell and Oxfordshire. However, this is only a partial picture as it only includes those eligible for benefits. There are many groups who fall outside this but may be seeking work and the population is expected to grow significantly:

- 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 workers at the Applicant's other lodges 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. 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
- High levels of growth are forecast in Cherwell and Oxfordshire: between 2017 and 2027, the population of Oxfordshire is expected to grow by 20% and Cherwell's population is expected to grow by 23%, higher than national growth of 8%. There is expected to be 19,500 additional working age residents (18 to 64) in Cherwell.

8.28 This all suggests that there is existing demand for jobs in the local area and this demand is expected to grow significantly in coming years when the Proposed Development is operational.

## Social impacts of the Proposed Development

### Staff culture, progression and retention

8.29 The Applicant runs resorts which tend to be inclusive, light hearted and friendly. All employees are referred to as 'Pack Members' which encourages a sense of unity amongst staff. The Applicant tries to make sure that everyone hired is a cultural fit to these values. In keeping with that, 42% of the current workforce is aged 21 or under, which contributes to the youthful atmosphere and culture.

8.30 There is a high amount of flexible working at the resorts, with 46% of the current staff working part time. There are also seasonal staff who join for the busiest periods in between university semesters etc, which (as discussed above) is beneficial for students.

8.31 There are some workers that choose to make a career at Great Wolf Resorts. These workers found that the learning opportunities and career support was an attractive offer, and some have stayed as long as 20 years. Others have only ever worked for Great Wolf Resorts. The Applicant provided the following case studies demonstrating employee progression:

**CASE STUDY ONE**

*One employee started as a Retail Attendant before moving to an Attractions Attendant role and then to Guest Services as a PBX Operator (handling telephone calls). He is now a Night Auditor, leading Guest Services and Front Desk operations on the night shift.*

**CASE STUDY TWO**

*Another started as a Front Desk Agent 10 years ago, and was promoted within her first year to a Guest Services Supervisor. She then took a role as Sales & Catering Coordinator in the conference centre before a further step up to a Guest Services Manager where she remained for three years. Now, she has the leading role of Housekeeping Manager.*

**CASE STUDY THREE**

*Another started at Great Wolf 20 years ago as a Lifeguard. He then moved to Guest Services where he held roles as Supervisor, Manager and Director. A further promotion saw him take an Assistant General Manager position, before being made General Manager of the Wisconsin Dells lodge. He then moved to be General Manager of a new lodge at Colorado Springs.*

8.32 The recruitment of young people, the strong and clearly defined career progression, and the job retention at the Proposed Development are in keeping with the strategic priorities of the Oxfordshire Local Industrial Strategy[45] *"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"*, where a key point in the strategy is to *"create pathways and social mobility for young people"*.

### Education, skills and training

8.33 Staff are given thorough training upon joining the resort, both a general orientation and then role-specific training. The general orientation introduces new joiners to the Great Wolf brand, culture, procedures and safety standards. There is also an interactive training video on service which is compulsory for all staff. The role specific education includes training on how best to do the job and standard operating procedures in their specific area of the business. The training is delivered via lecture, demonstration, role-play and on-the-job learning. In addition, the company is developing a key talent program for Director level talent which will aim to develop future General Managers focusing on three main competency areas: Sales Through Guest Service, People Management and Financial Management.

8.34 Further training is delivered through job-specific programmes, such as a recognised lifeguarding qualification. This sort of offering will appeal to many local residents as a way to learn on the job.

[45] Oxfordshire LEP (2019), Oxfordshire Local Industrial Strategy. The Local Industrial Strategy priorities, page 52 and 53.

8.35 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 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.

Table 16: Potential role count at different skill levels (based on other GWR resorts)

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

*Source: The Applicant*

8.36 These offerings are clearly aligned with strategic objective 3 of the Cherwell Local Plan[46], "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."

8.37 In the draft Head of Terms, the Applicant has committed to:[47]

- providing a minimum of 150 local construction apprenticeships or apprenticeship starts as part of a wider Employment, Skills and Training Plan, and is progressing discussions with local construction apprenticeships facilitator: Ace Training; and
- providing local recruitment initiatives during the operational phase in accordance with CDC advice and will work with contacts at specialist course departments at UK universities and colleges.

### Wages

8.38 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.

### Working with local groups

8.39 The Applicant holds many mutually beneficial partnerships with local schools, colleges, universities and other local community groups in the US. The partnerships provide employment and training opportunities for those associated with the partner organisations at the same time as giving the Applicants access to a large labour pool.

8.40 Regarding the schools, colleges and university partnerships, the Applicant reported that many of the lodges partner with local culinary schools and programs to identify and employ cooks and chefs in their restaurants. The following case studies show how

[46] Cherwell District Council (2016). Cherwell Local Plan 2011-2031. Strategic objective 3.
[47] These obligations are from the draft Head of Terms and will be discussed further with CDC and OCC ultimately being secured through S106 legal agreement.

the Applicant has worked with local education providers at their US resorts, providing employment and training to local people.

**The Michigan Lodge in Traverse City** *partners with Michigan State University (MSU) due to MSU's strong hospitality program, attending 2-3 career fairs per year and offering students hands-on experience and opportunities in a variety of areas of hospitality. As a result, many students come back multiple years to experience different departments and get a more holistic view of different career options that hospitality can provide. With Great Wolf, they can experience the standards of Guest Services, Housekeeping and food and beverage (but in a resort setting all under one roof), and they can also get more unique experiences in Retail, Attractions and Aquatics. The lodge partners with the program to allow students to receive academic credit for their work with Great Wolf.*

**The Kansas City Lodge** *partners with the International School of Professional Bartending in Kansas City to recruit and give experience to bartenders for credit during their work and, in return, the school refers graduates to Great Wolf for bartending positions.*

**The LaGrange Lodge in Georgia** *partners with the local LaGrange College and career services centre to present as keynote speakers to their career exploration classes to educate students on careers in hospitality.*

**The Great Wolf Contact Centre in Madison, Wisconsin** *partners with the University of Wisconsin Madison to provide part-time work to students attending the university full time in Call Centre Agent roles.*

8.41 The Applicant is active with the local community around their resorts in the US. Some case studies of working with local community groups are shown below:

**The Minneapolis Lodge** *partners with the Confederation of Somali Community of Minnesota (CSCM) to educate the group and recent immigrants about job opportunities in hospitality, and partner to hold hiring events focused on the CSCM.*

**The Colorado Springs Lodge** *partners with Autism Speaks to work with autistic individuals to prepare them for roles at Great Wolf. As this partnership continues, Great Wolf hope to be able to identify ways to partner with Autism Speaks for guest facing roles as well.*

**The Mason Lodge in Ohio** *works with the local Workforce Development Office to hold hiring events for community members seeking work. The Workforce Development Centre is able to help provide job and interview skills to individuals and the partnership allows the centre to deliver on its promises to community members to put them back to work.*

8.42 The Applicant has committed to providing local recruitment initiatives during the operational phase in accordance with CDC advice and is working with developing contacts in specialist course departments at UK Universities and Colleges.

8.43 The Applicant has already met with Bicester Chamber of Commerce and Bicester Vision, presenting to over forty local businesses. They have also engaged with:

- Ace Training about apprenticeships in construction;
- Oxford Brookes University, who believe that they could play a role when planning has been granted; and
- Exeter University, who they have had strong interest from and who are keen to work on the opportunities for internships and business placements for their students.

8.44 It is clear that the partnerships offering at the Proposed Development is well suited to the local aims of policymakers in Cherwell and the wider Oxfordshire region. The OCC[48] state the aim for Oxfordshire is *"to be a place where everyone feels safe and healthy enough to play an active part in the community they choose. To be a county where communities are supported to step into new roles delivering local services"*.

8.45 The local community partnerships and initiatives offered by the Applicant will help to achieve these social aims and improve the living standards of Oxfordshire residents.

8.46 Furthermore, the partnerships offering is in keeping with the Oxfordshire Local Industrial Strategy[49] which states a key strategic priority as "*getting the fundamentals right – building a skills system that better responds to local demand".* This is reiterated in the strategic objectives of the Oxford-Cambridge Arc[50], where one strategic objective is *"bringing employers and skills providers together to understand the current and future skills needs, and planning provision to meet them.*

[48] Oxfordshire County Council, Thriving communities, retrieved https://www.oxfordshire.gov.uk/council/our-vision/thriving-communities May 2019
[49] Oxfordshire LEP (2019) Oxfordshire Local Industrial Strategy. The text is one of the Local Industrial Strategies priorities, listed on page 52.
[50] Oxfordshire LEP (2019) Oxfordshire Local Industrial Strategy. Priorities listed on page 11.

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