

NW Bicester

An application for the exemplar phase of the
NW Bicester Eco Development proposals submitted by
P3Eco (Bicester) Limited and the A2Dominion Group

Economic Baseline

SQW

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Executive Summary

1. This Economic Baseline is intended to inform the economic strategy for the NW Bicester Eco Development, including both the Exemplar phase and the main development. It will also provide a starting point against which the Eco Development's impact on various indicators can be assessed. The map shows the location of the Exemplar and the main Eco Development in relation to the whole of Bicester.
2. The baseline presents and summarises data for a wide range of economic and social variables relating to Bicester. The variables selected are based on the economic baseline indicators proposed in the CLG/TCPA guidance on eco-towns¹. In many cases, published data are only available for a wider area (frequently Cherwell District, occasionally the county), some of the data are quite dated (most notably from the 2001 Census) and change over time is difficult to measure in some cases due to discontinuities. Nevertheless, the baseline provides a great deal of detailed information on the current characteristics of Bicester and the wider area. In many cases this includes comparisons with regional and county averages and a range of neighbouring and other similar places.
3. In addition, the Baseline also reports (in Section 4) the findings of interviews with firms in Bicester undertaken as part of the work to produce the economic strategy for the Exemplar and main Eco Development, and includes a summary of the draft Cherwell Economic development Strategy produced by the District Council in November 2010.
4. The key findings of the Baseline analysis are summarised in Table 1. The most distinctive characteristics of Bicester, and those that are most relevant to the economic strategy for the Exemplar and full Eco Development, include:
 - Bicester is a successful market town that has grown substantially over the last 10 years in terms of both population and jobs, and further growth is expected to continue in future
 - in total there are around 13,000 jobs in Bicester and nearly 20,000 residents of working age (not all of whom are in, or seeking, work). Therefore some out-commuting is inevitable, but Census data shows that in 2001 only 6,643 people both lived and worked in Bicester. Therefore the amount of in-and out-commuting is actually substantially in excess of that necessitated by the overall jobs/workforce balance. This is partly explained by people exercising choice about where to live and work, but it is likely also to result from the imbalance between the type of jobs available in Bicester and the skills of local residents. Gross weekly pay per worker in Bicester is much less than per resident, suggesting that Bicester residents commute out to higher paid jobs, and in-commuters to Bicester work in relatively lower paid jobs. The high rate of commuting could increase further as a result of the rail improvements currently underway, unless there is a better match in future between the type of jobs available locally and the skills and aspirations of Bicester residents

¹ See http://www.tcpa.org.uk/data/files/20090327_et_ws_economy.pdf, Table 1

- of the 13,000 jobs in Bicester, over 60% are accounted for by five sectors: retail trade (19.5%), wholesale trade (14.2%), other business activities (12.0%), education (7.9%) and health and social work (7.1%)². in addition, several manufacturing sub sectors have a relatively strong presence in Bicester, but knowledge-intensive businesses³ employ under 9% of Cherwell's workforce
- based on a combination of national trends and local strengths and opportunities, there appears to be potential for jobs growth in eco construction, environmental and goods and services (both stimulated by the Eco Development), manufacturing, high value logistics, and business, financial and professional services
- interviews with a selection of local firms revealed that there is currently significant growth potential, particularly in the manufacturing sector, but this is being frustrated by the lack of high quality sites and premises. The availability of land for commercial development is very limited in Bicester, and firms regard the existing stock of commercial space as dated and unattractive. As a result, Bicester is losing precisely the kind of high quality firms and jobs that it needs to attract and retain (see Table 2-1 for the headlines from the consultations with local firms)
- firms also had concerns about the unreliability of energy and broadband supply in some locations, and more generally about traffic congestion and parking provision
- Bicester has benefitted from inward investment in the past: an example is Biotronik, a German medical instruments manufacturer, which located its UK sales and services office on the Avonbury Business Park because of Bicester's central location and accessibility within the UK
- there is also current evidence of inward investment interest in Bicester, but potential investors are constrained by the current property offer
- the rates of business start up and survival are above UK and SE regional averages but below most neighbouring areas. Self employment is below the county and regional averages
- educational attainment in Bicester has improved in recent years, although it is still below the county average. By Oxfordshire standards, a high proportion of the working age population has no qualifications and a relatively low proportion has degree level or equivalent qualifications
- although Bicester has some excellent specialist training provision - most notably in motorsport at the OCVC campus - training rates amongst employed population in the district fell between 2006 and 2009 from average to low in relation to comparator areas

² Annual Business Inquiry 2008.

³ Knowledge-intensive industries are based on the OECD definition, which includes pharmaceuticals; office machinery and computers; aerospace; precision instruments; electrical engineering; telecommunications; financial intermediation; insurance and pension funding; activities auxiliary to financial intermediation; computer and related activities; R&D; other business activities; motion picture and video; and radio and television activities.

- Bicester has high percentages of the working age population economically active and employed. Unemployment and deprivation are at relatively low levels, although the situation varies between wards, with the main problems concentrated in Town Ward and to a lesser extent East and West wards.
5. These and other factors are drawn together into an overall summary of strengths, weaknesses, opportunities and threats facing Bicester in Section 2 of the economic strategy. The remainder of the strategy identifies how the Exemplar and full Eco Development will help address the opportunities and counter the threats facing Bicester in future.

Table 1: Key findings in relation to indicators

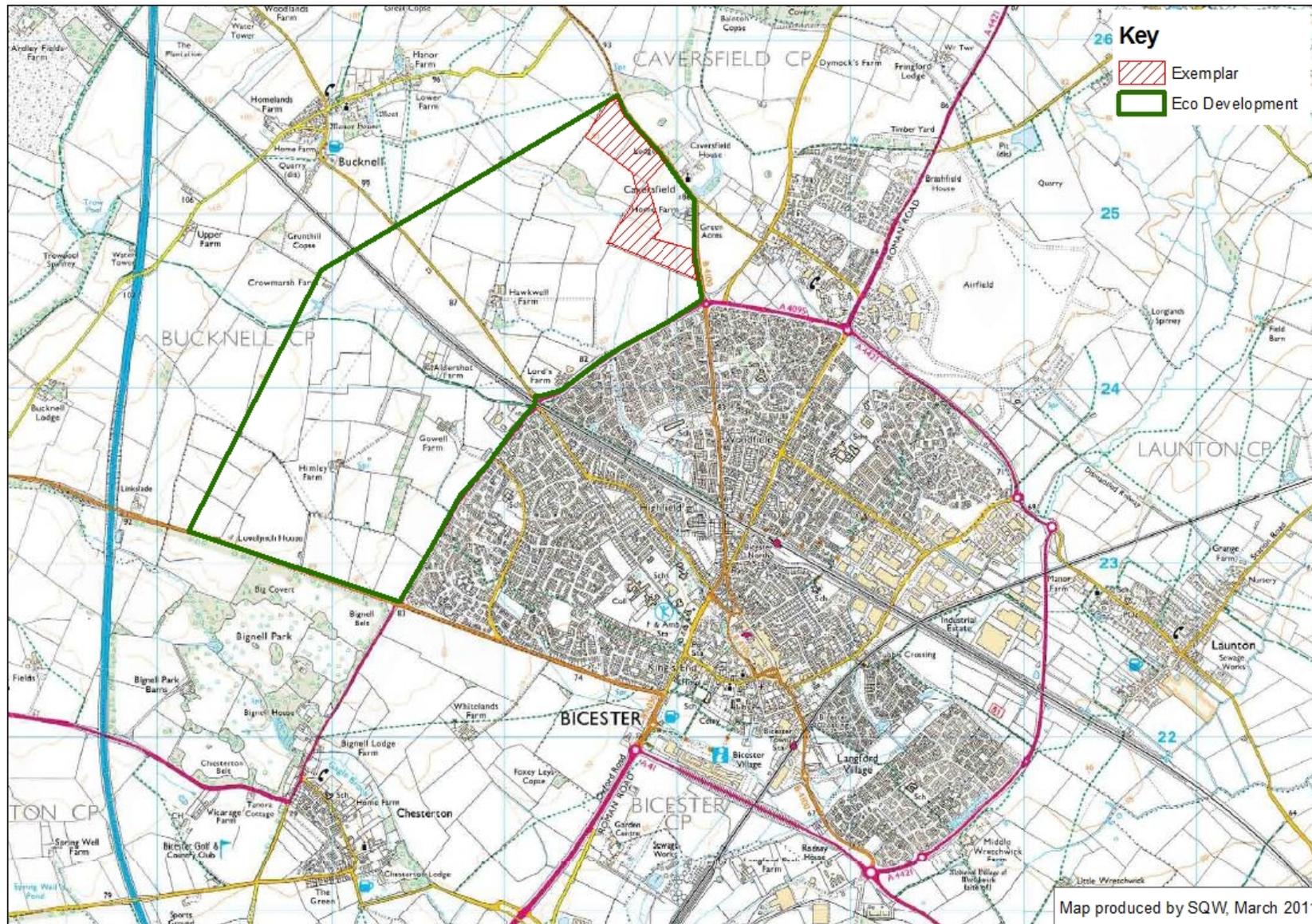
Indicator	Key findings
Population, demographics and labour supply (Chapter 2)	
Characteristics of the local and sub-regional population	Over the last decade, the population of Cherwell has grown by 7%. The District has a high proportion of working age residents – above both national and regional averages.
Economic activity rates	Economic activity and employment rates are similar to Oxfordshire as a whole but above the national and regional average.
Migration and existing commuting patterns across the sub-region	At the time of the 2001 Census there were 16,650 Bicester residents in work. Of these, only 6,643 people (40) both lived and worked in Bicester. However, 58% worked within Cherwell District. Hence was substantial out-commuting by Bicester residents, although much of it was to elsewhere in the District. More people commute out of Bicester to work – with Oxford as the single most popular destination – than commute in from elsewhere. A relatively high proportion of out commuters are in professional and technical and administrative and secretarial occupations.
Population and labour supply forecasts	Based on 2008 projections (i.e. not taking into account the NW Bicester proposals), over the next 20 years the population of Cherwell is expected to increase by 14% - an average of approximately 1,000 per year. In contrast, the working age population is expected to increase by only 2,000 people between 2010 and 2031 – a rate of increase which is well below the SE regional or national averages. Put differently, the total population will include 6.7% less people of working age by 2031 than it does now.
Employment and labour demand (Chapter 3)	
Employment distribution across sectors – identifiable growth sectors	Cherwell has a relatively high proportion of employment in manufacturing, and a relatively low proportion in banking and financial and other services, compared with Oxfordshire and regional averages. In Bicester, one in five employees work in the retail trade, whilst 12% work in “Other business activities” and 8% work in the Health and social work sector. Wholesale trade is also over-represented, with 14% of employees. In terms of potential growth sectors, the Environmental Goods and Services (EGS) sector and the construction and high value construction sectors are not strongly represented in Bicester. The same is also true for auto engineering, high-performance engineering and knowledge intensive manufacturing but these sectors are strongly represented across Oxfordshire as whole (these findings are based on ABI data, and are at variance with the observation that there are a number of firms linked to the motorsport sector in Bicester. Unfortunately, ABI data is notoriously unreliable for small areas due to sampling errors, but it is the best employment data available.) Bicester does however demonstrate a relative degree of strength in the logistics sector.
Occupational distribution of employment	Cherwell has a relatively low proportion of its residents in the top occupational codes (managerial and professional, etc.). Conversely it has an over-representation in the elementary and process occupations. The same is true of the worker occupations, and there appears to be a good balance at the district level between the occupations of the resident population and the workforce.

Indicator	Key findings
Part-time versus full-time employment	A relatively high proportion of Cherwell's resident workforce works part-time (26.7%).
Self-employment	Self employment in Cherwell is below the Oxfordshire and national average.
Vacancies across key sectors	Vacancies in Cherwell are relatively concentrated in manufacturing, and also in distribution, hotels and restaurants.
Employment growth forecasts for the region and sub-region	The latest employment projections for Cherwell were produced in 2005, pre recession. They predict an increase in employment in Cherwell of 15,000 between the years 2006 and 2026. This equates to an increase of 16.3% over the 20 year period, compared to 15.4% for the SE region as a whole. In contrast, regional forecasts produced post recession are much lower, predicting a 2% increase in employment over a 12 year period 2008-20.

Business performance and competitiveness (Chapter 4)

Business start-up activity – company births and deaths, VAT registrations across the sub-region	The number of active enterprises in Cherwell relative to the working population is low, compared to neighbouring districts and South Oxfordshire. However, the number of new enterprises per 10,000 popn is high – implying a high rate of start ups but also a relatively high proportion of larger firms.
Business survival rates and business incubation activity	Business survival rates in Cherwell are relatively high after 1 year (93.9%), compared with Oxfordshire, regional and national rates. However, in the longer term – up to 5 years – survival rates for Cherwell remain above the regional and national averages, but below the Oxfordshire average. In Cherwell, just over half of business start ups survive for more than 5 years.
Skills gaps and skills shortages	A high proportion of vacancies in Cherwell are in elementary occupations, compared to comparator districts, and a low proportion are in professional and technical occupations (and very low in “skilled trades”). There is an occupational mismatch between vacancies notified to Job Centre Plus (JCP) and those of residents, although this observation may be affected by the types of jobs that are advertised through JCP.
Availability of business space and premises	Compared with Oxfordshire as a whole, Cherwell has a relatively high proportion of allocated land designated for manufacturing and storage, and a relatively low proportion for offices. However, Bicester (in contrast to Banbury) has very little land allocated for industrial use and one major site with planning permission for office use, but where the permission has not been implemented. The industrial land study undertaken in 2006 found that the commercial premises in Bicester are generally in ‘good condition’, but a high proportion is over 40 years old and, based on our consultations, firms generally regard it as dated and unsuitable for modern business use. Land and buildings for commercial use are relatively expensive in Cherwell compared with similar districts elsewhere. However, the prices in Cherwell are typical of Oxfordshire as a whole. Retail space is particularly expensive, but this may be due to the effect of Bicester Village.
Hard and soft infrastructure	The firms interviewed considered that business networks were generally adequate, and a few reported that they had been useful for securing valuable contracts locally. Firms' concerns about hard infrastructure were focused on transport, energy supply and broadband. Firms considered Bicester to be very well located in relation the national road and rail network, but had concerns about congestion at Junction 9 of the M40, and a lack of parking for both HGVs and employees. Concerns about energy and broadband mainly concerned the unreliability of supply in some locations, and in relation to energy some firms had had to install back-up generators.
Incidence of environmentally sustainable and low-carbon business practice	Per capita CO ₂ emissions are relatively high (8.5t), although this is mostly industrial and commercial. Much of this may be related to a high average level of commercial and industrial gas consumption. Per capita reduction since 2005 appears to be strong, but it is unclear whether this is due to increasing efficiency or the closure of some high emission businesses.

Indicator	Key findings
Education, skills, qualifications and training (Chapter 5)	
Key Stage 2 attainment, GCSE attainment, A Level attainment	In 2008/09, GCSE attainment levels, if core subjects (English and Maths) are included, were low compared with Oxfordshire, the region and all comparator districts – though above the national average. Attainment at A level was very low relative to comparators. However, data for November 2010 suggests that both GCSE and A level scores have improved in recent years and are now only slightly below the county average.
Ongoing participation in training by the working age population	Training rates amongst employed population in Cherwell fell between 2006 and 2009 from average to low in relation to comparators.
Nature and levels of various skills/qualifications within the working age population	By Oxfordshire standards, a high proportion of the working age population (9.4%) have no qualifications. However, this proportion is below regional and national averages. Nearly 30% of Cherwell's working age population have NVQ4+ qualifications, nearly 5% points below Oxfordshire and also below the SE regional average. However, the firms interviewed did not generally regard the availability of labour or skills as a particular constraint on growth.
Training provision and the absence of specific forms of training provision	OCVC's Bicester campus specialises largely in motorsports, with some provision also in sustainable energy and building services. Training related to Bicester's other employment strengths (e.g. in retail, wholesale and other manufacturing) is not provided at OCVC's Bicester campus, although there is much more extensive provision across other OCVC campuses.
Social inclusion and social infrastructure (Chapter 6)	
Unemployment rates – concentrations and groups	Cherwell unemployment rate is close to the county average but well below the national rate.
Social exclusion indicators – Index of Multiple Deprivation domains	The rate of benefits claimants is above county but well below the national average. Within Bicester, unemployment and benefit claims and eligibility for free school meals are highest in Bicester Town, East and West wards. However, 16 out of 23 of Bicester's 'Lower Super Output Areas' (Census terminology) fall within the least deprived 20% in the country, and none within the most deprived 20%.
Access to services and key forms of social infrastructure	There are a number of GP surgeries within Bicester which are accepting new patients. Dental practices, pharmacies and opticians are largely clustered in the town centre. Bicester Community Hospital provides 12 beds, intermediate care, GP admissions, therapist outreach and an out-of-hours minor injuries unit. Bicester's primary schools have a surplus capacity of 13% (534 places), and the secondary schools have 420 surplus capacity places. Bicester Leisure Centre offers a swimming pool, teaching pool, crèche, sports hall, activity hall, squash courts etc. Bicester has a fire station and a police station. The closest ambulance station is some 12km to the North at Brackley.
Average earnings and the incidence of low incomes	Gross weekly pay per worker in Bicester is much less than per resident, suggesting that Bicester residents commute out to higher paid jobs, and in-commuters to Bicester work in relatively lower paid jobs. Earnings are highest among residents in North and South wards.
Welfare and community (Chapter 7)	
Health-related characteristics of the population	Life expectancy in Bicester is lower than all the comparator areas except the England average for males, but higher than all the comparator areas for females.
Characteristics of the housing stock	By Oxfordshire and SE standards, house prices are relatively low in Cherwell at an average of £247,000 in 2010. Houses in Cherwell are also relatively affordable compared with other districts in Oxfordshire and with the SE region as a whole. However, by national standards, and in comparison with most of the comparator districts, houses in Cherwell are expensive relative to earnings.
Characteristics of recorded crime	The crime rate in Cherwell is below the county and regional average, but above those for the other Oxfordshire districts (except Oxford city).



1: Introduction

- 1.1 This economic baseline has been prepared to inform the economic strategy for the exemplar phase and the full Masterplan, of the proposed Eco-development at NW Bicester. The baseline forms part of the documentation in support of the planning applications for the Exemplar and main development.
- 1.2 The structure is based on the guidance provided by the Town and Country Planning Association (TCPA) in the ‘Eco-towns economy worksheet’⁴.
- 1.3 It uses data available at the most relevant level – in most cases the lowest level geography for which up to date statistics are published. For many of the topics examined the data is available at district level only (i.e. Cherwell). The data is presented along with comparator data for the wider county (Oxfordshire), region (South East of England) and country (England). We have also presented data for selected comparators at district level (Cherwell), based on statistical nearest neighbours⁵, and nearby districts.
- 1.4 The currency of the data varies considerably. In general the most place specific data are from the 2001 Census, and therefore are now seriously dated. Measuring change over time is also problematic in some cases, where there are discontinuities in national data sets (as is the case, for example, with employment data in the Annual Business Inquiry).
- 1.5 For each Chapter, we present a series of tables and diagrams preceded by a summary commentary on the key points that derive from the tables. Chapter 4 also includes a report on the main findings of interviews with firms in Bicester, and the final Chapter provides a brief summary of Cherwell District Council’s Economic Development Strategy.

⁴ Developing Effective Economic Strategies for Eco-towns: Eco-towns Economy Worksheet, Advice to Promoters and Planners, March 2009, TCPA and CLG

⁵ The ‘statistical nearest neighbours’ to Cherwell are other local authority districts which are most like Cherwell, based on analysis of all 2001 Census data. The analysis forms part of the Census data. The districts which are most like Cherwell based on this analysis are Huntingdonshire, Aylesbury Vale, Basingstoke and Deane and Mid Bedfordshire

2: Population, demographics and labour supply

2.1 This chapter presents the evidence relating to population, demographics and labour supply in Bicester. To do this it draws on a number of secondary data sources including ONS mid-year population estimates to examine the characteristics of the local and sub-regional population and how it has changed over the last decade; data from the most recent Annual Population Survey (APS) on economic activity and commuting, data from the 2001 Census on commuting; and sub-national population projections that provide insight into future forecasts for growth in the population and labour supply. As noted in the introduction, analysis is undertaken at the lowest, robust geography (mainly Cherwell district) and compared to a range of comparator areas.

2.2 Through this data, it is possible to identify the following key findings:

- Cherwell has a **high proportion of working age residents** (62.2%), marginally above both national (61.9%) and regional (60.9%) averages. It is however marginally below the county average (62.8%). Its **economic activity and employment rates are also high**, above the national and regional average, and similar to Oxfordshire. Both of these factors suggest that Cherwell has a solid economic work base
- over the last decade **population in Cherwell has increased by 7%**, 1% more than regional and county comparators – this growth has however been spiky with both high levels and low levels (or indeed negative) growth. According to the 2008 sub-national population projections (which do not take into account the plans for NW Bicester), over the **next 20 years, the population of Cherwell is expected to increase** by 14% - approximately 1,000 people per year
- the Census shows that **more people commute out of Bicester to work – mainly to Oxford – than commute in from elsewhere**. Other, less significant destinations for Bicester residents commuting outwards include Aylesbury Vale, White Horse, South & West Oxfordshire and London. 58% of Bicester's residents work within the District. Of those commuting into Bicester, most come from Aylesbury Vale, Oxford, West Oxfordshire and the East Midlands
- based on ONS Mid-2009 Quinary Estimates for wards, **in 2009 Bicester had an estimated 30,097 residents, including 19,670 residents of working age**
- the **working age population in Cherwell is expected to increase slowly**, so that by 2031 the working age population in the district is expected to be only 2000 greater than in 2010. This increase in working age population is expected to be at a slower rate than in the South East or nationally. The result being that **relative proportion of the population in this group will decline by 7.6%**.

Characteristics of the local and sub-regional population

2.3 Table 2-1 provides the 2009 mid-year population and working age population for Cherwell District along with national, regional, county and nearest neighbour comparators.

	Total Population	Working Age Population	
		Number	%
England	51,809,700	32,083,300	61.9
South East	8,435,700	5,135,300	60.9
Oxfordshire	640,300	401,800	62.8
Cherwell	139,200	86,600	62.2
Aylesbury Vale	173,500	106,900	61.6
Basingstoke and Deane	163,300	102,700	62.9
Huntingdonshire	165,800	101,900	61.4
Mid Bedfordshire	134,800	84,600	62.8
South Oxfordshire	130,600	77,800	59.6
West Oxfordshire	102,500	60,700	59.2

Source: Mid Year Population Estimates 2009

2.4 Table 2-2 and Table 2-3 then show the ethnicity and age breakdown of the population for these same geographies.

	White	Mixed	Asian or Asian British	Black or Black British	Chinese or Other
England	88.24 %	1.70 %	5.71 %	2.83 %	1.52 %
South East	92.05 %	1.52 %	3.47 %	1.57 %	1.39 %
Oxfordshire	91.79 %	1.64 %	2.99 %	1.53 %	2.06 %
Cherwell	93.68 %	1.53 %	2.62 %	1.16 %	1.09 %
Aylesbury Vale	91.15 %	1.72 %	4.14 %	1.78 %	1.21 %
Basingstoke and Deane	93.82 %	1.37 %	2.62 %	1.12 %	1.19 %
Huntingdonshire	93.65 %	1.34 %	2.46 %	1.27 %	1.12 %
Mid Bedfordshire	93.65 %	1.34 %	2.46 %	1.27 %	1.12 %
West Oxfordshire	95.87 %	1.18 %	1.18 %	0.89 %	0.98 %
South Oxfordshire	94.63 %	1.17 %	2.02 %	1.09 %	1.09 %

Source: ONS – Experimental estimated population by ethnic group and sex, mid-2007

Table 2-3: Population Age - 2009

	Aged 0 - 14	Aged 15 - 29	Aged 30 - 44	Aged 45-64	Aged 65+
England	17.5 %	20.1 %	21.0 %	25.2 %	16.2 %
South East	17.6 %	18.7 %	20.7 %	26.0 %	17.0 %
Oxfordshire	17.7 %	20.8 %	21.2 %	24.9 %	15.5 %
Cherwell	18.6 %	17.3 %	23.0 %	26.3 %	14.9 %
Aylesbury Vale	19.0 %	16.9 %	22.0 %	27.2 %	14.9 %
Basingstoke and Deane	18.8 %	17.0 %	23.2 %	27.0 %	14.1 %
Huntingdonshire	18.3 %	16.6 %	22.0 %	27.7 %	15.6 %
Mid Bedfordshire	18.3 %	16.4 %	23.1 %	27.4 %	14.5 %
South Oxfordshire	18.6 %	15.5 %	21.2 %	27.5 %	17.4 %
West Oxfordshire	18.2 %	15.6 %	20.9 %	27.3 %	18.0 %

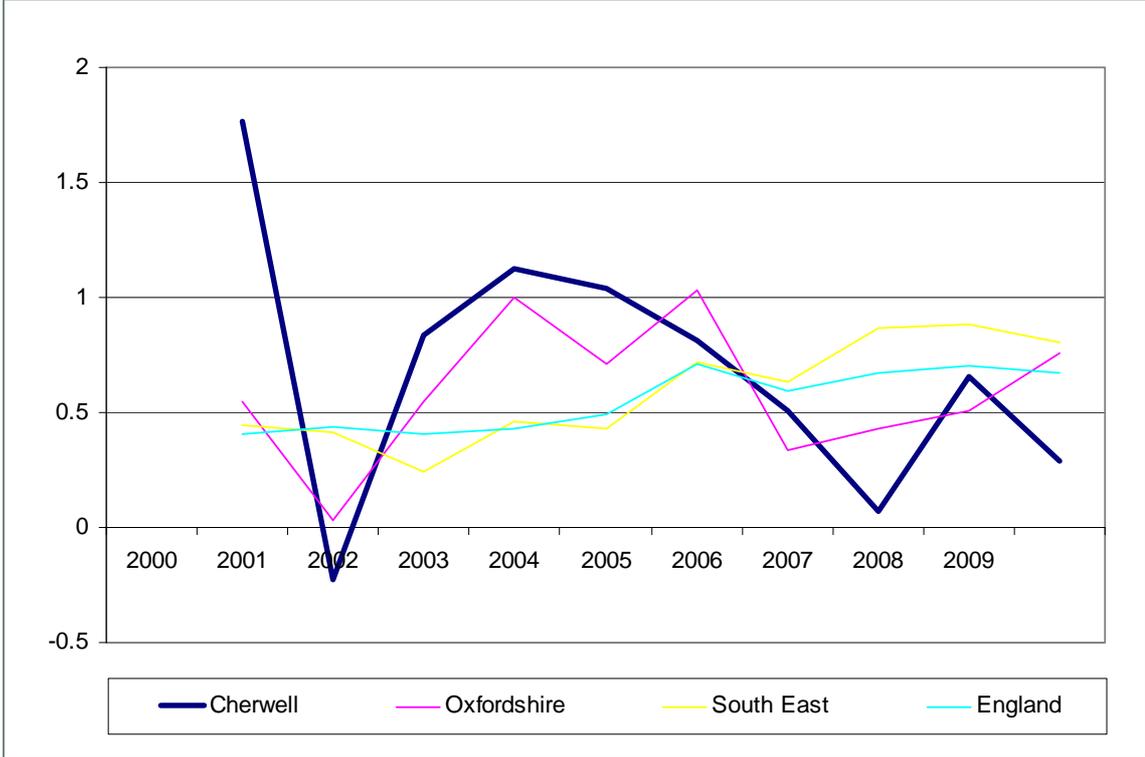
Source: Mid Year Population Estimates 2009

- 2.5 Based on ONS Mid-2009 Quinary Estimates for wards, in 2009 Bicester had an estimated 30,097 residents, including 19,670 residents of working age. However, ONS ward population estimates are experimental, and ward level estimates are less robust than (though consistent with) Mid Year Population Estimates used to estimate the population of Cherwell and other districts throughout this paper.

Population change

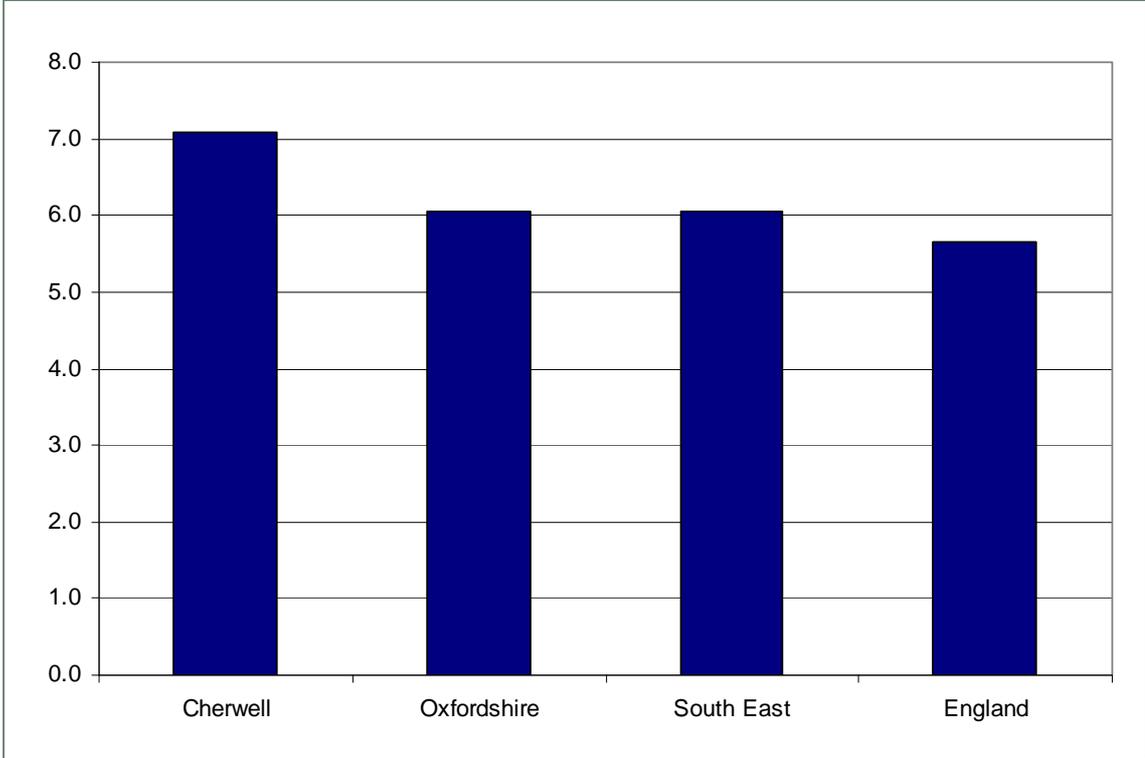
- 2.6 Figure 2-1 shows the average annual population growth – again using mid year population estimates – in Cherwell between 1999 and 2009 and compares this to growth in the county, region and nationally, while Figure 2-2 shows the total percentage change between 1999 and 2009.

Figure 2-1: Average annual population growth, percentage change 1999-2009



Source: Mid Year Population Estimates 2009

Figure 2-2: Population growth, percentage increase - 1999-2009



Source: Mid Year Population Estimates 2009

Economic activity rates

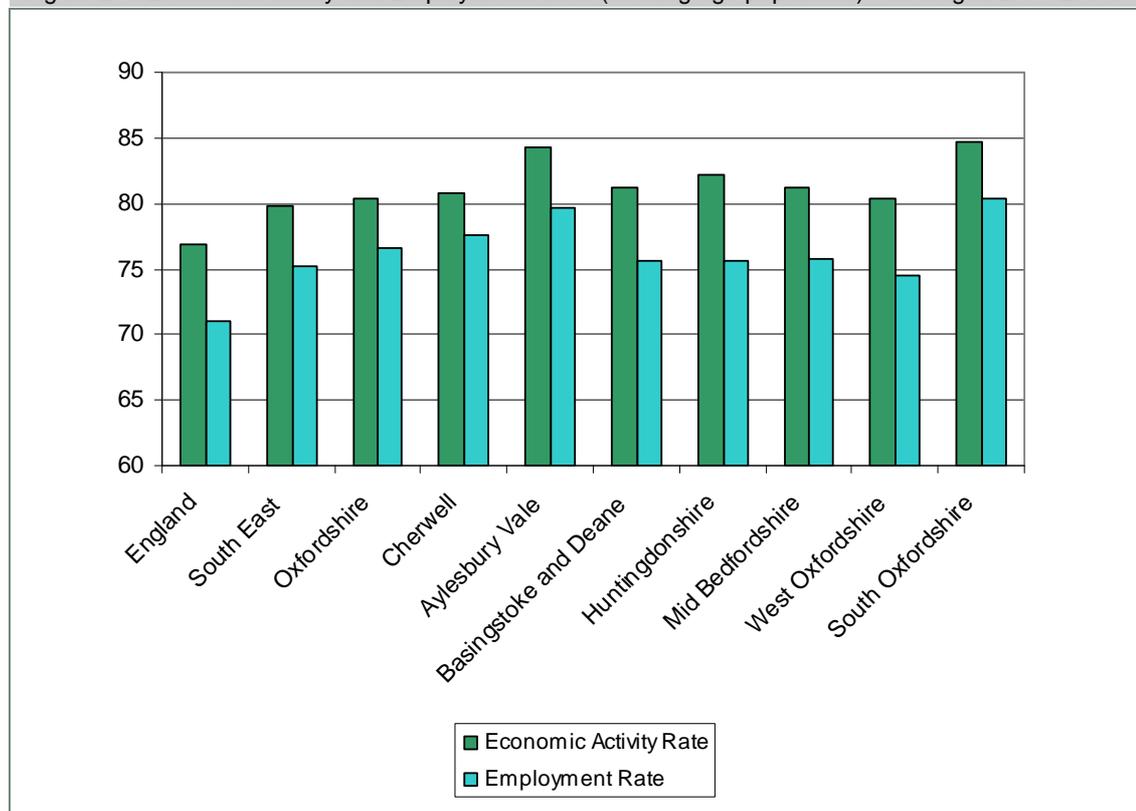
2.7 Table 2-4 and Figure 2-3 show the economic activity and employment rates of the working age population using data from the Annual Population Survey (APS). The data has been averaged for 2009 and 2010 to remove any anomalies arising from sampling variation due to small sample sizes.

Table 2-4: Economic Activity and Employment Rates (working age population) – averaged 2009-2010

	Economic Activity rate (working age)	Employment rate (working age)
England	76.85 %	71.05 %
South East	79.87 %	75.22 %
Oxfordshire	80.35 %	76.60 %
Cherwell	80.85 %	77.65 %
Aylesbury Vale	84.32 %	79.65 %
Basingstoke and Deane	81.25 %	75.60 %
Huntingdonshire	82.2 %	75.67 %
Mid Bedfordshire	81.15 %	75.80 %
West Oxfordshire	80.35 %	74.50 %
South Oxfordshire	84.65 %	80.32 %

Source: Annual Population Survey 2009-2010

Figure 2-3: Economic Activity and Employment Rates (working age population) – averaged 2009-2010.



Source: Annual Population Survey 2009-2010

Migration and existing commuting patterns across the sub-region

- 2.8 In the tables and figures below we present the commuting figures sourced from the 2001 Census for Bicester; both in- and out-commuting. Origins or destinations which account for less than 1% of the flows have not been included in these tables or diagrams.
- 2.9 It should be noticed that the APS is a source of more recent commuting data but that due to its sample nature it is less robust than the 2001 Census. The APS data also suggest that there have been no significant change in Cherwell's commuting patterns between 2001 and 2008.
- 2.10 One additional source of information on the commuting habits of Bicester's working residents is household travel diary data derived from the 2007 Household Diary Surveys undertaken as part of the Central Oxfordshire Transport Model.⁶ This data is relevant because it is much more up to date than information provided by the Census, but it is based on sample surveys, and should therefore be treated as indicative only. This data is discussed at page twelve.

District commuting – Census 2001

In-commuting to Bicester

- 2.11 Table 2-5, Table 2-6 and Figure 2-4 show the largest in-commuting into Bicester wards.

Table 2-5: In-commuting to Bicester – Significant Origins by District

Area of Residence	Workers	% of Bicester's workforce
Cherwell (including Bicester and Banbury)	8,639	74.3 %
Aylesbury Vale	778	6.7 %
Oxford	339	2.9 %
West Oxfordshire	297	2.6 %
White Horse	228	2.0 %
South Oxfordshire	178	1.5 %
Banbury (5 wards ⁷)	319	2.7 %

Source: Census 2001

Table 2-6: In-commuting to Bicester – Significant Origins by Region

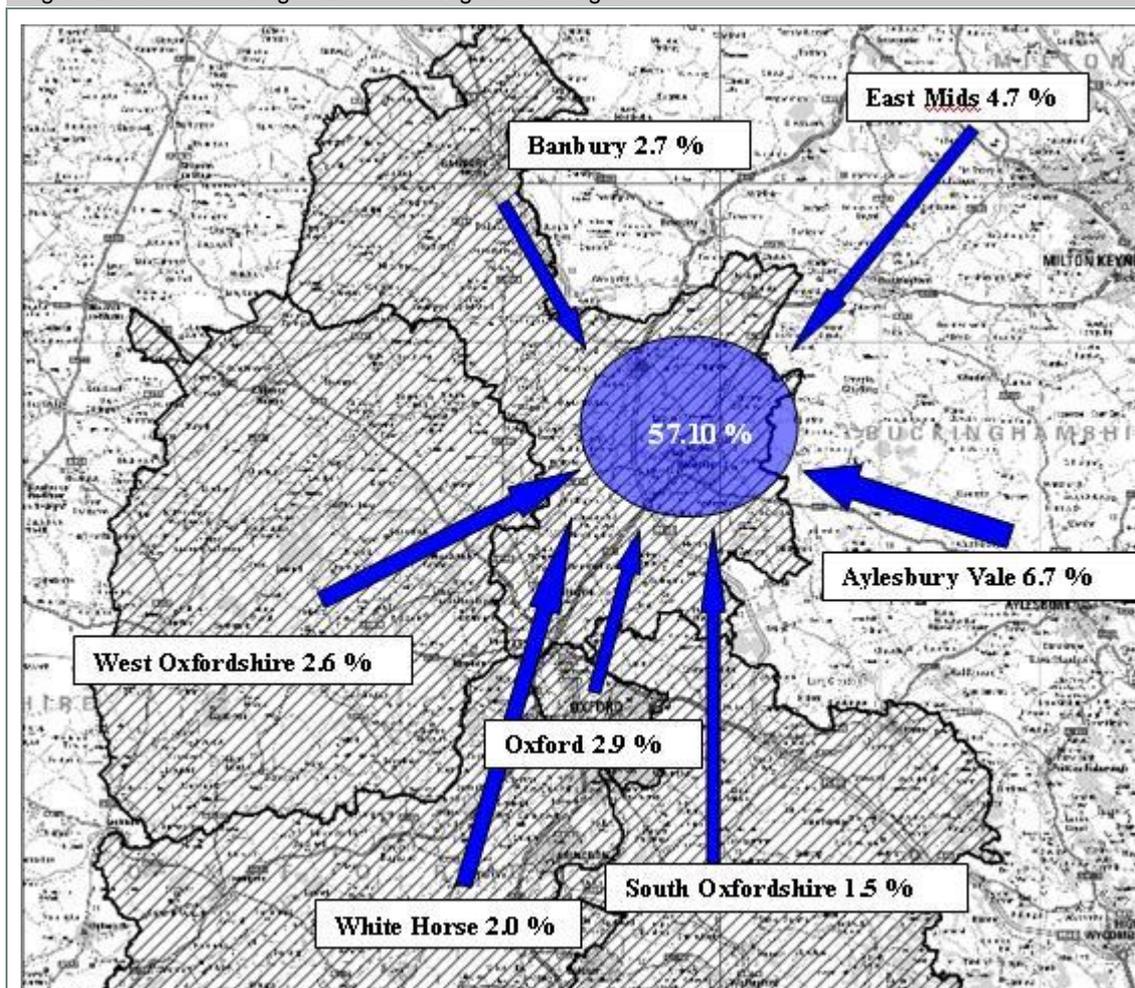
Area of Residence	Workers	% of Bicester's workforce
South East (including Cherwell)	10,681	91.8 %
East Midlands	541	4.7 %
East	129	1.2 %
West Midlands	102	0.9 %
South West	90	0.8 %
London	39	0.3 %

Source: Census 2001

⁶ As cited in *NW Bicester Eco Development Draft Travel Plan – Exemplar Site*. Hyder Consulting for P3 Eco (Bicester) Limited & A2 Dominion Group. November 2010.

⁷ Banbury Calthorpe, Easington, Grimsbury, Hardwick, Neithrop & Ruscote.

Figure 2-4: In-commuting to Bicester – Significant Origins



Source: Census 2001. Produced by SQW Consulting 2010; © Ordnance Survey. Crown Copyright. License number 100019086

Out-commuting from Bicester

2.12 Table 2-7, Table 2-8 and Figure 2-5 show the largest out-commuting flows from Bicester wards.

Table 2-7: Out-commuting from Bicester – Significant Destinations

Area of Workplace	Workers	Percentage of working Bicester Residents
Cherwell (including Bicester and Banbury)	9,669	58.3 %
Oxford	2,437	14.6 %
Aylesbury Vale	600	3.6 %
White Horse	505	3.0 %
South Oxfordshire	496	3.0 %
West Oxfordshire	435	2.6 %
Banbury (5 wards)	389	2.3 %

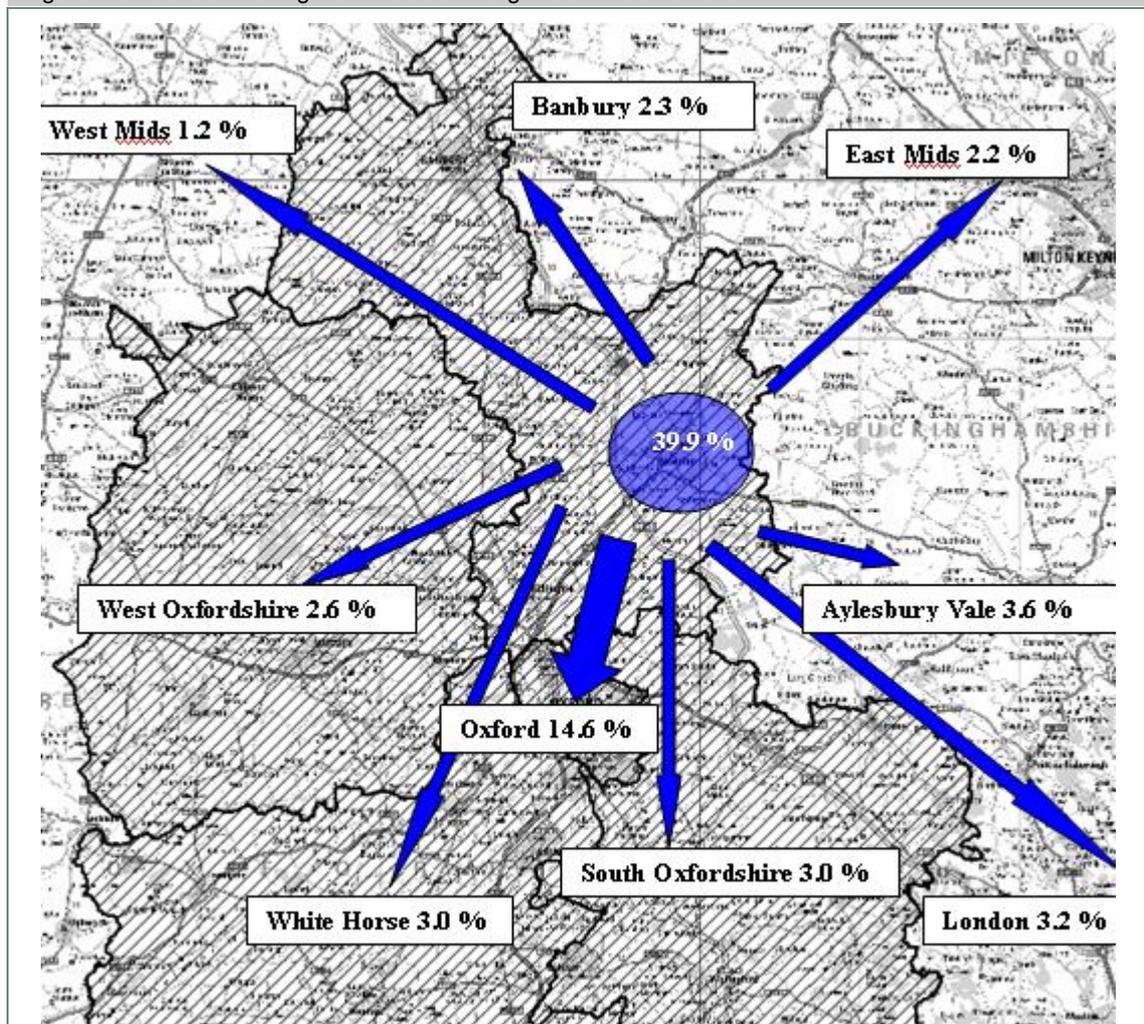
Source: Census 2001

Table 2-8: Out-commuting from Bicester – Significant Destinations by Region

Area of Workplace	Workers	Percentage of working Bicester Residents
South East (Cherwell)	15,182	91.3 %
London	534	3.2 %
East Midlands	363	2.2 %
West Midlands	205	1.2 %
East	173	1.0 %
South West	96	0.5 %

Source: Census 2001

Figure 2-5: Out-commuting from Bicester – Significant Destinations



Source: Census 2001. Produced by SQW Consulting 2010; © Ordnance Survey. Crown Copyright. License number 100019086

Commuting within Cherwell – Census 2001

Cherwell residents commuting into Bicester

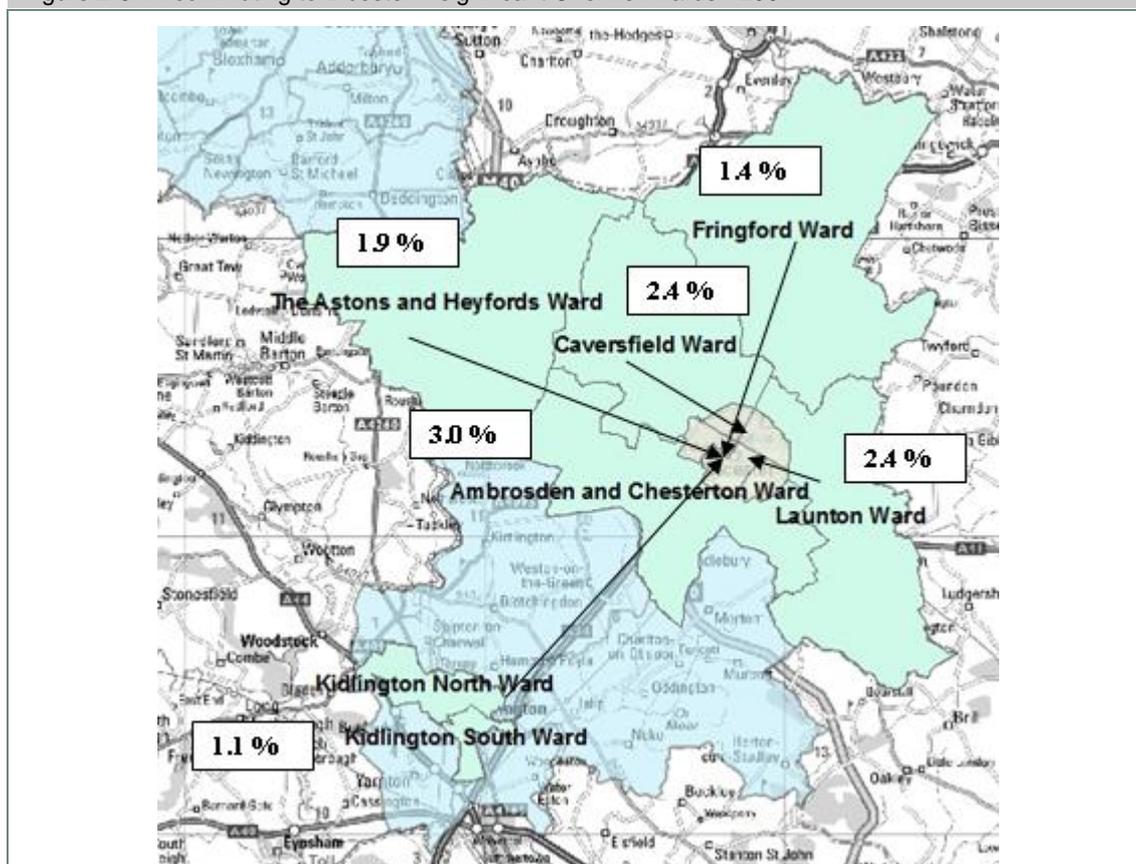
2.13 Table 2-9 and Figure 2-6 show the in-commuting to Bicester wards for those residents of Cherwell wards only.

Table 2-9: In-Commuting to Bicester – Significant Cherwell Origins by Ward

Area of Residence	Workers	% of Bicester's workforce
Bicester (5 wards)	6643	57.1 %
Launton	278	2.4 %
Caversfield	276	2.4 %
The Astons and Heyfords	225	1.9 %
Fringford	168	1.4 %
Kidlington (2 wards) ⁸	128	1.1 %
Banbury (5 wards) ⁹	319	2.7 %

Source: Census 2001

Figure 2-6: In-commuting to Bicester – significant Cherwell wards - 2001



Source: Census 2001. Produced by SQW Consulting 2010; © Ordnance Survey. Crown Copyright. License number 100019086

Bicester residents commuting out to Cherwell

2.14 Table 2-10 and Figure 2-7 show the out-commuting from Bicester wards to significant destinations in Cherwell.

⁸ Kidlington North and South

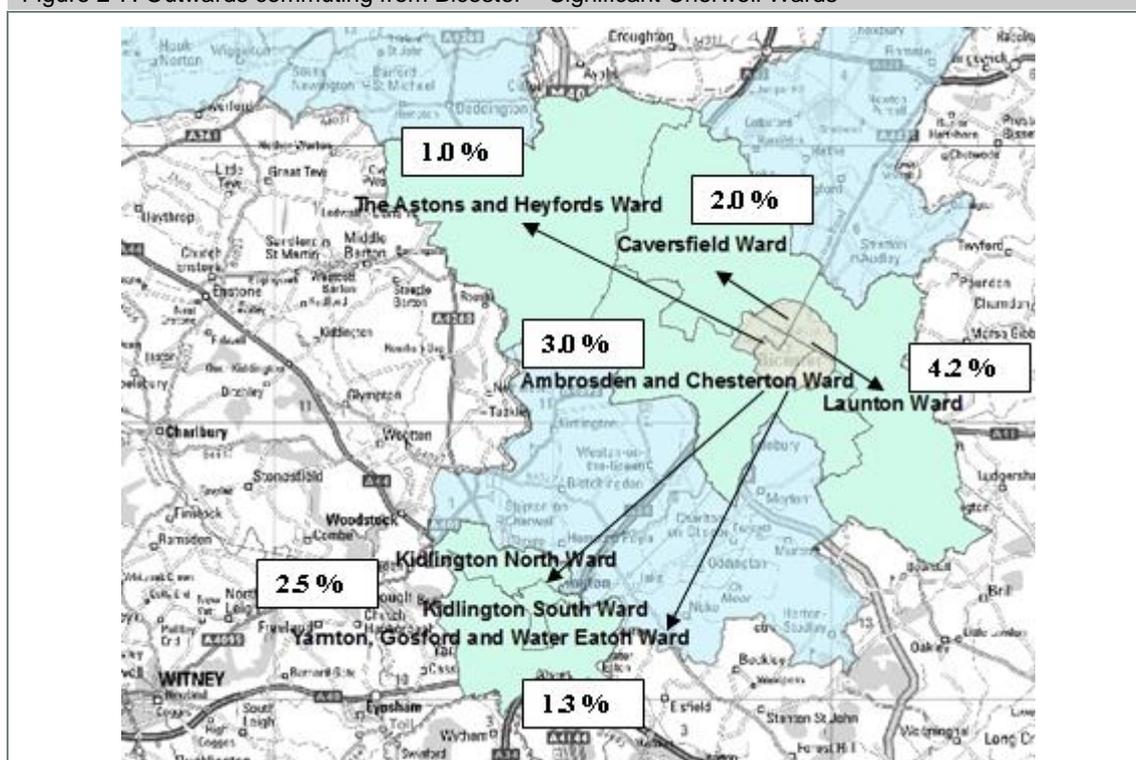
⁹ See footnote 3

Table 2-10: Outwards Commuting from Bicester – Significant Cherwell Destinations by Wards

Area of Workplace	Workers	Percentage of working Bicester Residents
Bicester (5 wards)	6643	39.9 %
Launton	694	4.2 %
Ambroseden and Chesterton	505	3.0 %
Kidlington (2 wards) ¹⁰	420	2.5 %
Caversfield	343	2.0 %
Yarnton, Gosford and Water Eaton	220	1.3 %
The Astons and Heyfords	171	1.0 %
Banbury (5 wards) ¹¹	389	2.3 %

Source: Census 2001

Figure 2-7: Outwards commuting from Bicester – Significant Cherwell Wards



Source: Census 2001. Produced by SQW Consulting 2010; © Ordnance Survey. Crown Copyright. License number 100019086

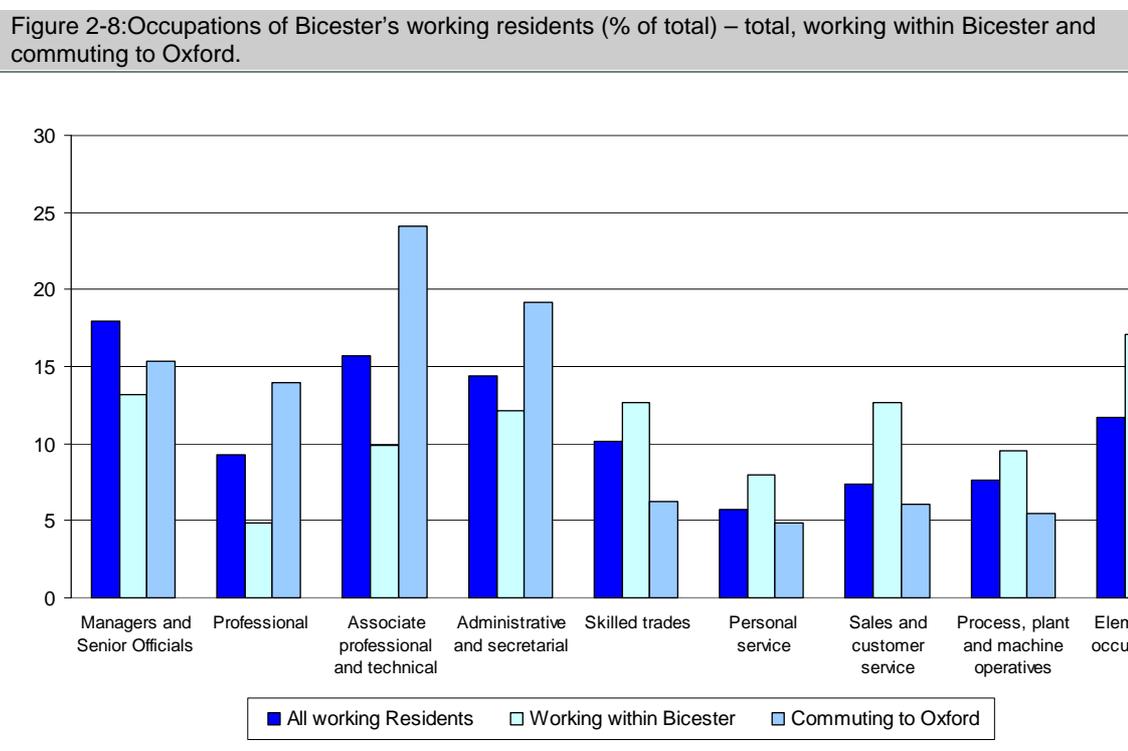
Characteristics of commuters

2.15 Figure 2-8 examines the broad occupational groups of three specific groups of workers who lived in Bicester in 2001. The first group is the entire resident working population of Bicester. The second group narrows this down to those who lived and worked within the town (40% of working residents and 57% of the workforce population). And the third group includes those workers who were resident in Bicester, but commuted to work in Oxford (14.6% of the working, resident population). Oxford is used here as a proxy for workers commuting out of

¹⁰ See footnote 4

¹¹ As stated on page 1.

Bicester to work, because it represented by far the biggest single district destination for those doing so. The figure shows that a relatively high proportion of the associate professional and technical, and administrative and secretarial groups commute out, and a high proportion of those in skilled trades, personal services, sales and elementary occupations work locally.



Source: Census 2001.

Commuting – Household Travel Diary Data

- 2.16 Data from the Household Diary Surveys undertaken as part of the Central Oxfordshire Transport Model is also relevant.¹² This data is much more up to date than information provided by the Census, but it is based on sample surveys, and therefore subject to errors.
- 2.17 According to the Household Diary Surveys data, 37% of all trips recorded by a sample of Bicester residents in 2007 were for work-related purposes. The average number of trips per day, per household was 2.74 to a place of work, and 0.88 on employers business. Table 2-11 highlights the main destinations identified for work-based trips.

District/ Ward Name	% of Trips
Oxford District	9.8
Kidlington Wards	9.5
Bicester East Ward	9.5
Bicester Town Ward	9.5
Wards South and West of Bicester	6.9

¹² As cited in *NW Bicester Eco Development Draft Travel Plan – Exemplar Site*. Hyder Consulting for P3 Eco (Bicester) Limited & A2 Dominion Group. November 2010.

District/ Ward Name	% of Trips
South Oxfordshire District	6.4
Wards North and West of Bicester	4.9
South Northamptonshire District	4.6
West Oxfordshire District	4.1
Aylesbury Vale District (South)	3.6
Total to Main Destinations	68.9

Source: NW Bicester Eco Development Draft Travel Plan – Exemplar Site. Hyder Consulting for P3 Eco (Bicester) Limited & A2 Dominion Group. November 2010

Population and labour supply forecasts

2.18 Table 2-12 and Table 2-13 show the population forecasts for both the whole population and the working age population for 2010 to 2033, with Table 2-14 and Figure 2-9 showing the percentage change, for Cherwell and the different comparator areas used in this baseline.

Table 2-12: Population Forecasts – whole population (000s)

	2010	2013	2016	2019	2022	2025	2028	2031	2033
England	52,198.2	53,332.0	54,471.6	55,645.9	56,822.5	57,965.1	59,051.1	60,070.7	60,715.2
South East	8,497.5	8,695.9	8,896.0	9,105.1	9,320.0	9,531.9	9,734.3	9,925.6	10,046.7
Oxfordshire	644.1	655.8	667.1	679.1	691.7	704.8	717.6	729.2	736.5
Cherwell	140.7	143.8	147.0	150.2	153.6	156.6	159.5	162.2	164.0
Aylesbury Vale	173.9	177.2	180.7	184.2	187.8	191.3	194.5	197.7	199.7
Basingstoke And Deane	164.4	168.9	173.3	177.7	182.1	186.3	190.1	193.6	195.9
Huntingdonshire	167.0	170.2	173.5	177.1	180.8	184.4	187.7	190.9	192.9
Mid Bedfordshire	137.4	142.1	146.9	151.7	156.5	160.9	164.9	168.6	170.9
South Oxfordshire	131.0	132.7	134.7	137.0	139.4	141.8	144.0	146.2	147.6
West Oxfordshire	104.1	107.0	110.0	113.0	116.1	119.0	121.7	124.2	125.7

Source: 2008 sub-national population projections

Table 2-13: Population Forecasts – working age population

	2010	2013	2016	2019	2022	2025	2028	2031	2033
England	32,276.1	32,649.2	32,992.8	33,233.6	33,499.7	33,765.3	33,962.2	34,153.6	34,340.1
South East	5,162.9	5,219.9	5,281.9	5,327.3	5,375.8	5,421.2	5,450.8	5,476.9	5,503.7
Oxfordshire	403.8	405.8	407.3	407.9	409.2	411.0	411.6	411.8	412.6
Cherwell	87.5	88.1	89.0	89.4	89.8	90.0	89.7	89.5	89.6
Aylesbury Vale	106.6	106.7	107.4	107.7	107.8	107.8	107.3	106.8	106.9
Basingstoke And Deane	103.1	104.8	106.5	107.7	108.7	109.5	109.8	110.2	110.7
Huntingdonshire	102.2	102.3	102.7	103.0	103.3	103.4	103.2	103.0	103.0

	2010	2013	2016	2019	2022	2025	2028	2031	2033
Mid Bedfordshire	86.0	88.0	89.8	91.4	92.8	93.8	94.3	94.7	95.0
South Oxfordshire	77.7	77.4	77.5	77.6	77.7	77.8	77.3	77.1	77.2
West Oxfordshire	61.4	62.0	62.6	63.1	63.6	63.9	63.8	63.7	63.8

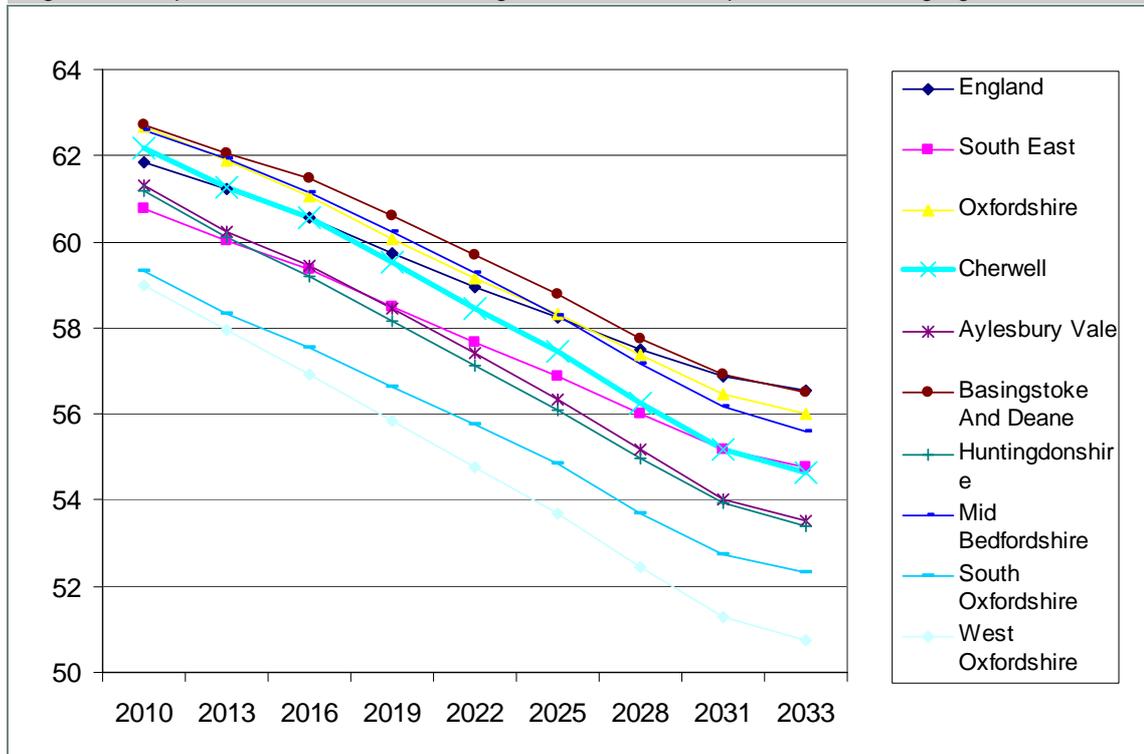
Source: 2008 sub-national population projections

Table 2-14: Population Forecasts – Percentage change total population and working age population, 2010-2033

	% Change – Total Population 2010 - 2033	% Change – Working Age Population 2010-2033	Relative decrease in % of population of working age 2010-2033
England	14.0	6.0	-5.3
South East	15.4	6.2	-6.0
Oxfordshire	12.5	2.1	-6.7
Cherwell	14.2	2.3	-7.6
Aylesbury Vale	12.9	0.3	-7.8
Basingstoke And Deane	16.1	6.9	-6.2
Huntingdonshire	13.4	0.8	-7.8
Mid Bedfordshire	19.6	9.5	-7.0
South Oxfordshire	11.2	-0.6	-7.0
West Oxfordshire	17.2	3.8	-8.2

Source: 2008 sub-national population projections

Figure 2-9: Population Forecasts – Percentage of the Resident Population of Working Age



Source: 2008 sub-national population projections

3: Employment and labour demand

- 3.1 This chapter presents the evidence relating to employment and labour demand in Bicester. It draws on the APS, Annual Business Inquiry (ABI), the 2009 Business Register and Employment Survey (BRES), the 2001 Census and Job Centre Plus data to explore the: characteristics of the sub-regional employment base; key employment sectors in Cherwell and Bicester (where the data is available); levels of part-time and self employment; number of vacancies; and employment forecasts.
- 3.2 Through this data, it is possible to identify the following key findings:
- according to BRES data, **13,153 people were employed in Bicester in 2009** (excluding agricultural workers, the numbers for which were too small to be disclosed). This figure comprises 12,279 employees and 874 ‘working proprietors’
 - Cherwell has a relatively **low proportion of its residents in the top occupational codes** (managerial and professional, etc.). Conversely it has an **over-representation in the elementary and process occupations**. The same is true of the worker occupations, and **there appears to be a good balance at the district level between the resident population and the workforce**
 - Cherwell has a relatively **high proportion of employment in manufacturing**, and a **relatively low proportion in banking and financial and other services**, compared with the Oxfordshire and regional averages
 - in Bicester, **one in five employees work in the retail trade** and compared to the south east as a whole this is a particular specialism of Bicester. A **fifth of employees also work in the service sector**, although employment in this sector is under-represented in Bicester compared to the wider south east; and **18% work in the public sector**, although again like the service sector employment in this sector is under-represented compared to the south east. After retail trade, **the next largest sector in which Bicester could be considered to specialise in is wholesale trade (14%)**
 - in terms of potential growth sectors, the **Environmental Goods and Services (EGS) sector and the construction and high value construction sectors are not strongly represented in Bicester at present**. The same is also true for **auto engineering, high-performance engineering and knowledge intensive manufacturing but these sectors are strongly represented across Oxfordshire as whole** (these findings are based on ABI data, and are at variance with the observation that there are a number of firms linked to the motorsport sector in Bicester. Unfortunately, ABI data is notoriously unreliable for small areas due to sampling errors, but it is the best employment data available). **Bicester does however demonstrate a relative degree of strength in the logistics sector**
 - **about a quarter of Cherwell’s resident and worker populations work part-time**, this is similar to the national, regional and county average

- **self employment in Cherwell is below the Oxfordshire, south east and national average.** Rates are only lower in the comparator districts of Basingstoke & Deane and Huntingdonshire
- **vacancies in Cherwell are relatively concentrated in manufacturing, and also in distribution, hotels and restaurants.**

Characteristics of the sub-regional employment base

3.3 Using three year average data (to minimise sampling error) from the Annual Population Survey, Table 3-1 and Figure 3-1 show the occupations of residents in Cherwell and the comparator areas, with Table 3-2 and Figure 3-2 showing the occupations of the workers in Cherwell and the comparator areas. Figure 3-3 then compares the resident and worker occupations for Cherwell.

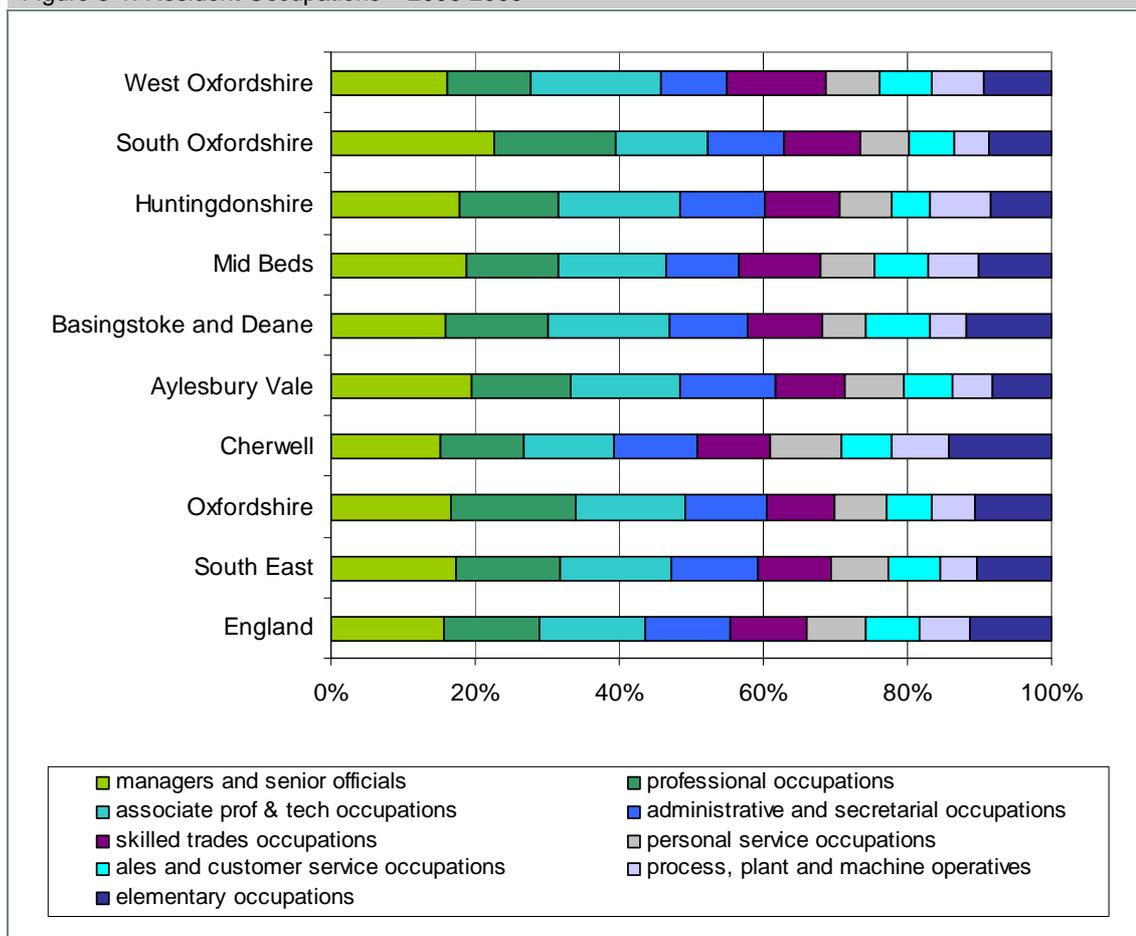
Occupations of residents

Table 3-1: Resident Occupations – Percentages - 2006-9

	Total Resident Employees	Managers and Senior officials	Professional occupations	Associate Prof & Tech occupations	Administrative and Secretarial occupations	Skilled Trades occupations	Personal Service occupations	Sales and Customer Service occupations	Process, Plant and Machine Operatives	Elementary occupations
England	24,377,676	15.7	13.2	14.6	11.7	10.7	8.0	7.5	7.0	11.3
South East	4,152,371	17.4	14.4	15.4	11.9	10.1	8.0	7.1	5.2	10.3
Oxfordshire	334,682	16.7	17.3	15.2	11.2	9.4	7.4	6.3	5.9	10.6
Cherwell	74,294	15.2	11.6	12.5	11.4	10.0	10.1	6.9	7.9	14.3
Aylesbury Vale	89,759	19.4	13.7	15.3	13.2	9.7	8.2	6.8	5.4	8.2
Basingstoke and Deane	86,382	16.0	14.2	16.8	10.8	10.2	6.1	9.0	5.1	11.7
Mid Beds	70,629	18.6	12.8	14.9	10.2	11.1	7.5	7.5	6.9	10.2
Huntingdonshire	88,700	17.9	13.7	16.9	11.7	10.4	7.1	5.4	8.3	8.5
South Oxfordshire	65,253	22.7	16.7	12.9	10.4	10.6	6.9	6.2	4.8	8.7
West Oxfordshire	54,153	16.1	11.5	18.2	9.0	13.8	7.6	7.2	7.1	9.4

Source: Annual Population Survey, averaged 2006-2009

Figure 3-1: Resident Occupations – 2006-2009



Source: Annual Population Survey, averaged 2006-2009

Occupations of workers

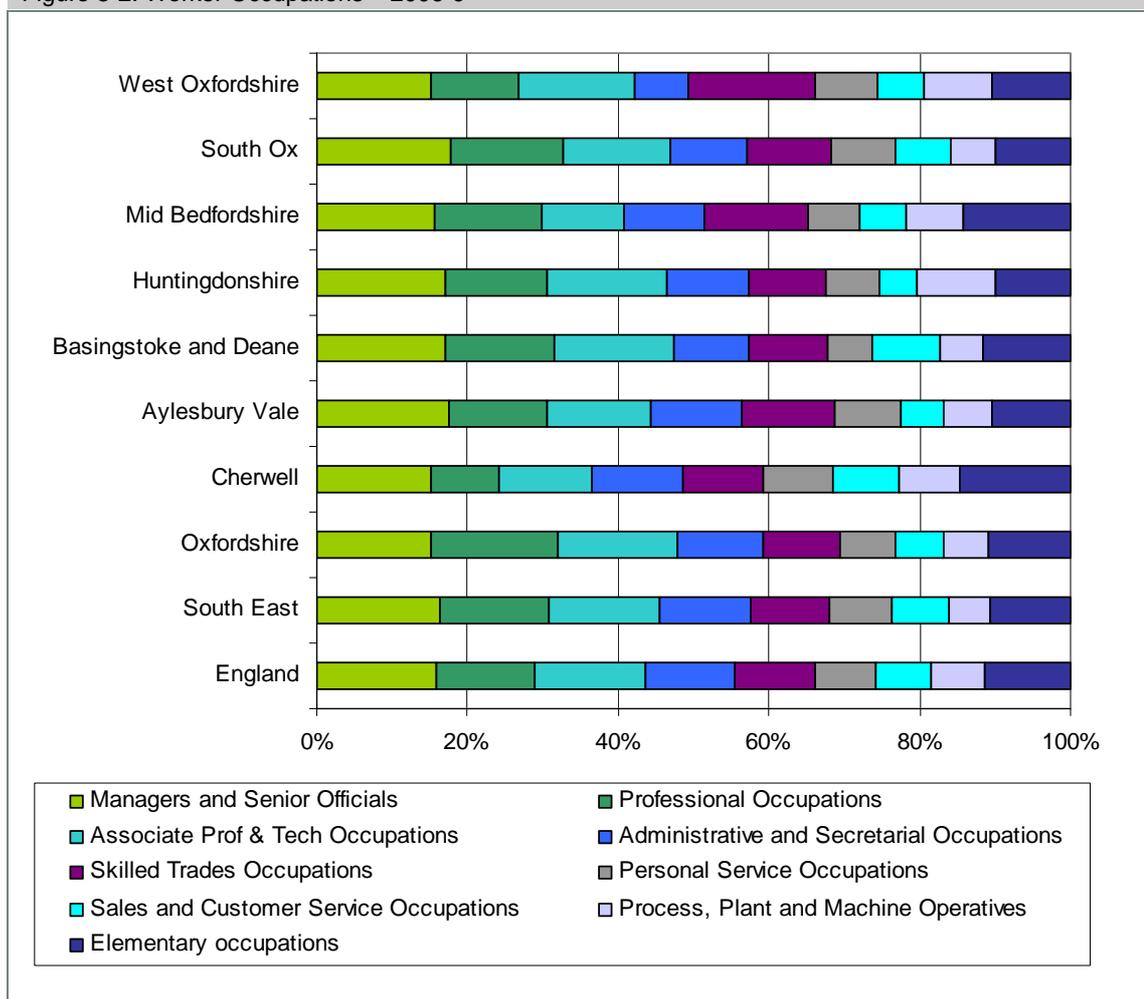
Table 3-2: Worker Occupations – Percentages - 2006-9

	Total Employees	Managers and Senior Officials	Professional occupations	Associate Prof & Tech occupations	Administrative and Secretarial occupations	Skilled Trades occupations	Personal Service occupations	Sales and Customer Service occupations	Process, Plant and Machine Operatives	Elementary occupations
England	24,177,406	15.8	13.2	14.6	11.8	10.7	8.1	7.5	7.0	11.3
South East	3,950,224	16.4	14.3	14.8	12.0	10.6	8.3	7.6	5.4	10.7
Oxfordshire	345,029	15.3	16.6	16.0	11.4	10.1	7.4	6.4	6.0	10.8
Cherwell	71,076	15.2	9.1	12.3	12.0	10.8	9.3	8.6	8.1	14.8
Aylesbury Vale	73,424	17.5	12.9	13.9	12.0	12.4	8.6	5.7	6.4	10.5
Basingstoke and Deane	82,224	17.1	14.6	15.7	10.1	10.3	6.0	9.1	5.5	11.7
Huntingdonshire	74,288	16.9	13.6	15.9	10.9	10.3	7.2	4.8	10.5	9.9

	Total Employ-ees	Man-agers and Senior Officials	Profess-ional occu-pations	Assoc-iate Prof & Tech occu-pations	Admin-istrative and Secret-arial occu-pations	Skilled Trades occu-pations	Pers-onal Service occu-pations	Sales and Cust-omer Service occu-pations	Process, Plant and Machine Opera-tives	Elemen-tary occu-pations
Mid Bedfordshire	51,694	15.6	14.3	10.9	10.6	13.8	7.0	6.1	7.5	14.2
South Ox	57,741	17.8	14.9	14.2	10.1	11.1	8.7	7.2	5.9	10.1
West Oxfordshire	48,406	15.2	11.6	15.2	7.2	16.9	8.4	6.2	9.0	10.4

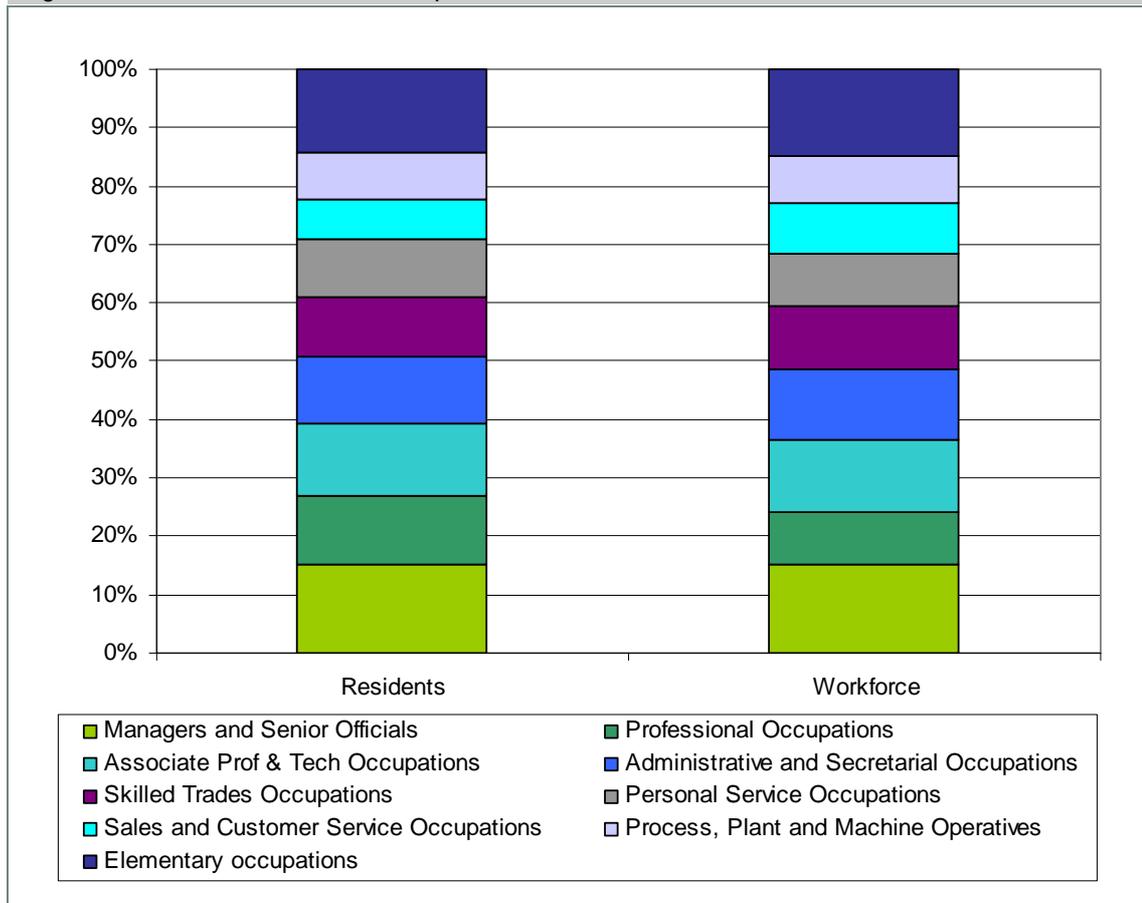
Source: Annual Population Survey, workplace analysis averaged 2006-2009

Figure 3-2: Worker Occupations – 2006-9



Source: Annual Population Survey, workplace analysis averaged 2006-2009

Figure 3-3: Resident and Worker Occupations – Cherwell – 2006-9



Source: Annual Population Survey & Annual Population Survey, workplace analysis averaged 2006-2009

Employment distribution across key sectors

3.4 Employment distribution across key sectors can be looked at through a number of lenses. In the tables that follow we look firstly at the extent to which Cherwell has particular specialisms (using location quotients¹³) as compared to the south east region. Next we look at the key sectors in Bicester based on both employee job numbers and specialism. Finally, we look at the employment numbers and specialism in a number of potential growth sectors based on the existing employment numbers in these sectors.

Sectoral specialism in Cherwell

3.5 Table 3-3 shows the Location Quotients for Cherwell and the other district and county comparators by broad industrial group. A figure of 1.25 or more suggests a degree of specialism compared to the regional average whilst a figure of 0.75 or below suggests that that sector is under-represented in an area.

¹³ A Location Quotient (LQ) compares the relative size of a specific industry in a defined geographic area (in this case the local authority district) to another defined geographic area (in this case the region). For example a LQ of 1.0 suggests that the incidence of the sector locally is similar to that across the region (in terms of its share of employee jobs); if the local industry has a LQ of 2.0 it is double the size relatively. Put simply, it is therefore a measure of *relative specialisation*

Table 3-3: Sectoral Employment by Broad Industrial Group (SIC 2003) – Location Quotients – SE Comparator - 2008

	Agriculture and Fishing	Energy and Water	Manufacturing	Construction	Distribution, hotels and restaurants	Transport and communications	Banking, finance and insurance	Public admin, education and health	Other services
South East	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
Oxfordshire	0.30	1.02	1.21	0.89	0.91	0.70	0.95	1.18	1.06
Cherwell	1.10	1.04	1.47	0.95	1.11	1.00	0.75	1.01	0.89
Aylesbury Vale	1.33	0.10	1.07	0.92	1.04	0.56	0.89	1.10	1.30
Basingstoke and Deane	0.81	0.38	1.33	0.95	1.01	0.95	1.11	0.70	1.55
Huntingdonshire	1.45	1.61	1.69	0.98	0.91	0.84	0.78	1.17	0.61
Mid Bedfordshire	1.67	0.13	1.48	1.58	0.98	0.92	0.74	0.95	1.29
South Oxfordshire	1.33	0.89	0.96	0.95	1.03	0.53	1.29	0.78	1.14
West Oxfordshire	1.65	0.96	1.67	1.22	1.00	0.71	0.86	0.78	1.64

Source: Annual Business Inquiry Employee Analysis 2008

Key sectors in Bicester

3.6 Table 3-4 shows those sectors in Bicester that employ more than 2% of the workforce. With Table 3-5 showing those sectors in which Bicester can be considered to have a degree of specialism. Table 3-6 shows the employee numbers, proportion of employees and LQ for the retail, service, public and construction sectors – sectors that play an important role in any local economy.

Table 3-4: Significant Sectoral Employment – Bicester (ward definition) – Employee Numbers - 2008

	% of total employees
Publishing, printing and reproduction of recorded media	2.5 %
Construction	3.3 %
Sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel	3.3 %
Wholesale trade and commission trade, except of motor vehicles and motorcycles	14.2 %
Retail trade, except of motor vehicles and motorcycles; repair of personal and household goods	19.5 %
Hotels and restaurants	4.8 %
Land transport; transport via pipelines	2.1 %
Supporting and auxiliary transport activities; activities of travel agencies	2.6 %
Financial intermediation, except insurance and pension funding	2.0 %

	% of total employees
Other business activities	12.0 %
Public administration and defence; compulsory social security	2.5 %
Education	7.9 %
Health and social work	7.1 %
Other service activities	2.3 %

Source: Annual Business Inquiry Employee Analysis 2008

Table 3-5: Over-represented Sectors – Bicester (ward definition) – Employee Numbers 2008

Industry	Percentage of Total Employees	LQ (SE Comparator)
Manufacture of wearing apparel; dressing and dyeing of fur	0.2 %	6.55
Publishing, printing and reproduction of recorded media	2.5 %	2.37
Manufacture of fabricated metal products, except machinery and equipment	1.5 %	1.75
Manufacture of electrical machinery and apparatus not elsewhere classified	0.9 %	2.07
Manufacture of furniture; manufacturing not elsewhere classified	0.8 %	2.01
Electricity, gas, steam and hot water supply	0.9 %	3.23
Wholesale trade and commission trade, except of motor vehicles and motorcycles	14.2 %	2.90
Retail trade, except of motor vehicles and motorcycles; repair of personal and household goods	19.5 %	1.83

Source: Annual Business Inquiry Employee Analysis 2008

Table 3-6: Other Important Sectors – Employee Numbers – Bicester (ward definition) - 2008

Broad Sectoral Definition	Industry	Employees	% of Total Employees	LQ (SE Comparator)
Construction	Construction	408	3.3 %	0.74
Service Sector (e.g. Office)	Financial intermediation, except insurance and pension funding	2,392	19.6 %	0.81
	Insurance and pension funding, except compulsory social security			
	Activities auxiliary to financial intermediation			
	Real estate activities			
	Computer and related activities			
	Other business activities			
	Other service activities			
Public Sector	Public administration and defence; compulsory social security	2,122	17.4 %	0.68
	Education			
	Health and Social Work			
Retail	Retail trade, except of motor vehicles and motorcycles; repair of personal and household goods	2,376	19.5 %	1.83

Source: Annual Business Inquiry Employee Analysis 2008

Potential growth sectors

- 3.7 A series of ‘growth sectors’ related to the eco-development and to Bicester’s location in the Oxfordshire and south Midlands sub regions have been identified. These are as follows;
- eco-construction
 - environmental goods and services
 - high value manufacturing, including auto engineering (in particular, motorsport and electric vehicles) and advanced manufacturing opportunities related to the Oxfordshire high tech cluster
 - high value logistics
 - business, financial and professional services.
- 3.8 A baseline analysis of each of these sectors has been undertaken using data from the Annual Business Inquiry (ABI) 2008. The number of employees working in each growth sector has been used as a proxy for their relative strength in Bicester, Cherwell, Oxfordshire, the South East and England. The definitions for each of these sectors are explained in Table 3-7 and a full SIC Code definition is included at Annex A.

Table 3-7: Priority Sectors - Definitions

“eco-construction and environmental goods and services”

The eco-construction sector is challenging to map. The SIC Code definition of the **‘Environmental Goods and Services’ (EGS)** sector is relevant, but does not include any coverage of construction for example. This definition was used most recently in the Greater London Assembly (GLA) Economics paper ‘How Big is London’s Green Sector?’¹⁴ It builds on previous definitions employed by BIS, DEFRA, Experian and UKCEED, but is still only a proxy. This first, broader measure has been used as a measure of the wider EGS sector.

A second, composite measure draws on construction of buildings and aspects of construction which are focused on design and engineering. It has been labelled as **‘construction of buildings and high-value construction’**. This proxy recognises the fact that eco-construction requires greater architectural and design input than conventional building. Strengths identified in these areas would suggest the presence of a sector with the potential to deliver eco-construction. The majority of Bicester’s construction activity will be focused on domestic buildings, and all of these are required to reach level 4 of the Sustainable Homes Code (SHC).

“high value manufacturing, including auto engineering, and advanced manufacturing related to the Oxfordshire high tech cluster”

Two separate, but overlapping measures of high-technology manufacturing, with an auto-engineering focus have been used here. The first is based on **‘auto engineering and high performance engineering’** and was recently developed by SQW for a piece of research to assess the employment trajectory of the Milton Keynes South Midlands sub-region.¹⁵

The second, narrower definition is based on the OECD definition of **Manufacturing Knowledge Intensive Businesses (KIBS)**.

“high value logistics”

The SIC code definition employed here is the definition of ‘Freight Logistics’ employed by Skills for Logistics, the relevant Sector Skills Council. It includes most aspects of wholesale, and other specific transport activities. There is no separate definition of high value logistics.

“business, financial and professional services”

The SIC code definition employed here was recently developed by SQW for a piece of research to assess the employment trajectory of the Milton Keynes South Midlands sub-region.¹⁶

Source: SQW

¹⁴ Simon Kyte, GLA Economics – Current Issues Note 25. How Big is London’s Green Sector? 2010.

¹⁵ SQW for the South East of England Regional Development Agency (SEEDA) – MKSM Research Project. 2009

¹⁶ SQW for the South East of England Regional Development Agency (SEEDA) – MKSM Research Project. 2009

3.9 Table 3-8 sets out employee numbers in defined growth sectors for Bicester and comparators and Table 3-9 sets out the percentage of all employees working in defined growth sectors for Bicester and comparators. Table 3-10 then shows whether employee numbers in these sectors and the proportion of total employment has grown or shrunk between 2006 and 2008 (due to changes in the data collection methodology it is not possible to assess the level of change pre-2006).

Table 3-8: Employee Numbers – Potential Growth Sectors - 2008

	Bicester	Cherwell	Oxfordshire	South East	England
Environmental goods and services sector	*	722	2,907	41,121	230,145
Construction of buildings and high value construction	195	1,790	10,227	121,483	709,837
Auto engineering and high performance engineering	154	1,372	13,954	99,982	539,551
Knowledge Intensive Manufacturing	177	2,015	11,148	121,247	593,848
Logistics	1,933	6,275	19,156	281,643	1,634,711
Professional, business and financial services	1,288	8,060	49,614	121,247	593,848

Source: ABI 2008. * - Too small to disclose

Table 3-9: Employee Numbers – Percentage of Total Employment – Potential Growth Sectors - 2008

	Bicester	Cherwell	Oxfordshire	South East	England
Environmental goods and services sector	*	1.1	0.9	1.1	1.0
Construction of buildings and high value construction	1.6	2.7	3.2	3.3	3.1
Auto engineering and high performance engineering	1.3	2.1	4.4	2.7	2.4
Knowledge Intensive Manufacturing	1.5	3.0	3.5	3.3	2.6
Logistics	15.9	9.4	6.0	7.6	7.1
Professional, business and financial services	10.6	12.1	15.5	16.8	15.2

Source: ABI 2008. * - Too small to disclose

Table 3-10: Relative actual and percentage point change in the size of the sector between 2006 and 2008.

	Bicester		Cherwell		Oxfordshire		South East		England	
	N	%	N	%	N	%	N	%	N	%
Environmental goods and services sector	1	0.0	116	0.2	110	0.0	477	0.0	15,949	0.1
Construction of buildings and high value construction	-3	-0.1	215	0.3	1,013	0.2	2,478	0.0	-4,430	0.0

	Bicester		Cherwell		Oxfordshire		South East		England	
Auto engineering and high performance engineering	32	0.2	532	0.7	850	0.1	4,637	0.1	13,166	0.0
Knowledge intensive manufacturing	23	0.2	38	0.0	1,356	0.3	7,144	0.1	37,926	0.2
logistics	258	1.3	-306	-0.6	-739	-0.5	4,017	-0.1	10,443	0.0
Professional business and financial services	169	0.9	1,014	1.3	1,937	0.0	29,074	0.4	184,361	0.7

Source: ABI 2008

- 3.10 Table 3-11 sets out Location Quotients (LQs) for Bicester, Cherwell and Oxfordshire, using a South East comparator. The LQs are used here to emphasise the relative strength or weakness of defined growth sectors in these three comparator areas in comparison to the regional picture.

Table 3-11: Employee Numbers – Location Quotients (South East Comparator) – Potential Growth Sectors 2008

	Bicester	Cherwell	Oxfordshire	South East	England
Environmental goods and services sector	*	0.98	0.83	-	-
Construction of buildings and high value construction	0.49	0.83	0.98	-	-
Auto engineering and high performance engineering	0.47	0.77	1.63	-	-
Knowledge Intensive Manufacturing	0.45	0.93	1.07	-	-
Logistics	2.10	1.25	0.79	-	-
Professional, business and financial services	0.63	0.72	0.92	-	-

Source: ABI 2008. * - Too small to disclose

Full-time versus part-time employment

- 3.11 Table 3-12 uses a three year average of the APS to show the proportion of full time and part time workers in Cherwell and the comparator areas. It looks at the proportion of workers based on both those that live in the area (resident) and those that work in the area (worker)

Table 3-12: Part-time and full-time employment – Resident & Worker - 2006-2009 (averaged)

		Full Time	Part Time
England	Resident	75.2 %	24.7 %
	Worker	75.3 %	24.6 %
South East	Resident	74.2 %	25.7 %
	Worker	73.3 %	26.7 %
Oxfordshire	Resident	74.6 %	25.4 %
	Worker	74.4 %	25.4 %
Cherwell	Resident	73.3 %	26.7 %
	Worker	73.9 %	26.1 %
Aylesbury Vale	Resident	74.9 %	25.1 %
	Worker	72.4 %	27.4 %
Basingstoke and Deane	Resident	76.2 %	23.7 %
	Worker	75.6 %	24.3 %
Huntingdonshire	Resident	79.5 %	20.4 %
	Worker	80.0 %	19.9 %
Mid Beds	Resident	79.8 %	20.1 %
	Worker	79.3 %	20.6 %
South Oxfordshire	Resident	74.1 %	25.9 %
	Worker	72.9 %	27.1 %
West Oxford	Resident	73.7 %	26.3 %
	Worker	73.0 %	27.0 %

Source: Annual Population Survey 2006-2009

Self-employment

- 3.12 Using the 2001 Census and a three year average of the APS, Table 3-13 and Figure 3-4 show the proportion of economically active residents who are self-employed for Cherwell and the comparator areas.

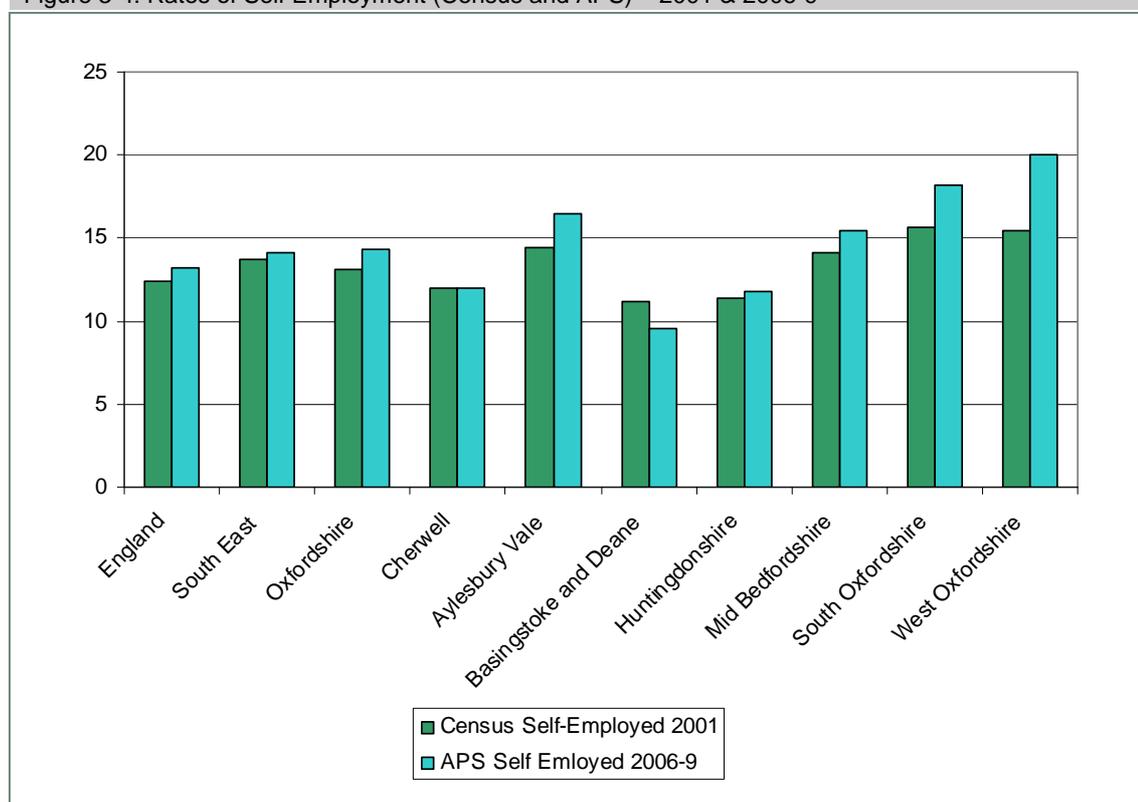
Table 3-13: Self-Employment Rates – 2001 & 2006-9

	Percentage of Economically Active Residents Self Employed (Census 2001)	Percentage of employed Residents Self Employed (APS 06-09)
England	12.4 %	13.2 %
South East	13.7 %	14.1 %
Oxfordshire	13.1 %	14.3 %

	Percentage of Economically Active Residents Self Employed (Census 2001)	Percentage of employed Residents Self Employed (APS 06-09)
Cherwell	12.0 %	12.0 %
Aylesbury Vale	14.4 %	16.5 %
Basingstoke and Deane	11.2 %	9.6 %
Huntingdonshire	11.4 %	11.8 %
Mid Bedfordshire	14.1 %	15.4 %
South Oxfordshire	15.7 %	18.2 %
West Oxfordshire	15.4 %	20.0 %

Source: Census 2001 & Annual Population 2006-9 (averaged)

Figure 3-4: Rates of Self Employment (Census and APS) – 2001 & 2006-9



Source: Census 2001 (% of economically active residents self employed) and Annual Population Survey 2006-9 (averaged) (% of employed residents self-employed)

Vacancies across key sectors

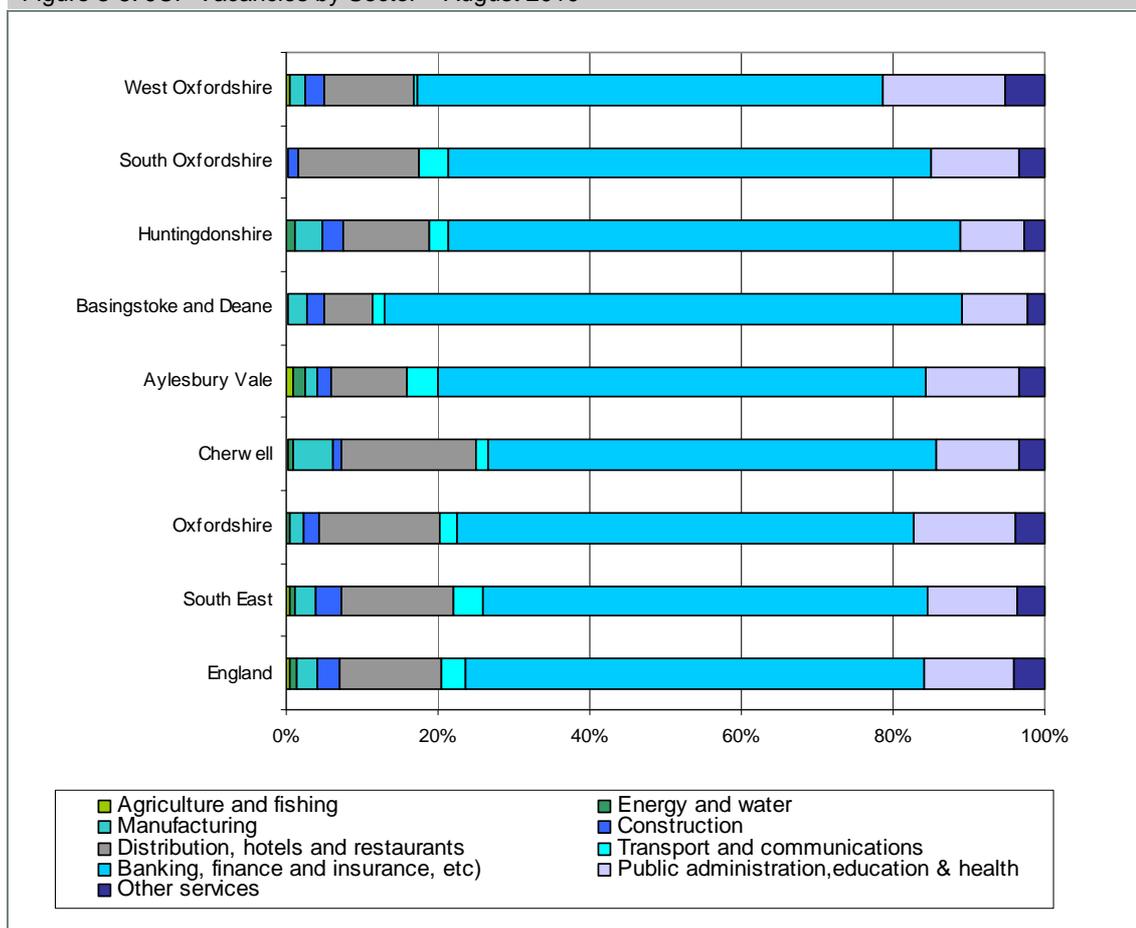
3.13 Table 3-14 and Figure 3-5 show the percentage of Job Centre Plus vacancies by sector in August 2010 for Cherwell and the comparator areas.

Table 3-14: JCP Vacancies by Sector – Percentages - August 2010

	Total Vacancies	Agriculture and fishing	Energy and water	Manufacturing	Construction	Distribution, hotels and restaurants	Transport and communications	Banking, finance and insurance, etc)	Public administration, education & health	Other services
England	335283	0.4	0.9	2.8	3	13.4	3	60.5	11.7	4.2
South East	46800	0.5	0.6	2.7	3.5	14.7	3.8	58.7	11.8	3.7
Oxfordshire	3413	0.1	0.3	1.8	2.2	15.8	2.3	60.2	13.4	3.8
Cherwell	665	0.2	0.8	5.1	1.2	17.7	1.7	58.9	11.1	3.3
Aylesbury Vale	713	0.8	1.7	1.5	1.8	10.2	3.9	64.4	12.1	3.5
Basingstoke and Deane	995	0.2	0	2.6	2.1	6.4	1.7	76	8.7	2.2
Huntingdonshire	988	0.1	1	3.7	2.7	11.3	2.5	67.4	8.3	2.8
South Oxfordshire	527	0	0	0.2	1.5	15.9	3.8	63.6	11.6	3.4
West Oxfordshire	438	0.5	0	2.1	2.3	11.9	0.5	61.6	16	5.3

Source: JCP – Vacancies – notified by sector. 2010

Figure 3-5: JCP Vacancies by Sector – August 2010



Source: JCP – Vacancies – notified by sector. 2010

Employment growth forecasts for the region and sub-region

- 3.14 Employment projections are often difficult to source, and should generally be treated with caution. This is particularly the case following large shifts in the regional or national economy (as experienced between 2008 and 2010).
- 3.15 The latest publically available employment projections that apply specifically to Cherwell were produced in 2005, published by the Institute for Employment Research (IER) at the University of Warwick.¹⁷ As such, they predate the recent recession, and are therefore indicative at best. The projections are based on the Local Economy Forecasting Model (LEFM), developed by Cambridge Econometrics (CE) and IER.
- 3.16 The application of the LEFM model in this case predicts an increase in employment in Cherwell of 15,000 between the years 2006 and 2026. This equates to an increase of 16.3% over a 20 year period. The model predicts a lower rate of increase across the South East as a whole, at 15.4% over the same period. As such, the model predicts that employment growth in Cherwell will be faster than regional comparators over this period.
- 3.17 SQW have recently used LEFM projections for the South East as part of another study in the region.¹⁸ Whilst these figures were not modelled with Cherwell or Bicester specifically in mind, they can provide an overview projection for employment in the South East. Importantly, these projections were modelled during the recent period of recession (2008), and are therefore much more relevant than projections pre-dating 2008. The headline projections are a total increase in South East regional employment of 81,000 jobs between 2008 and 2020. This equates to a percentage increase of 2% over the 12 year period. In contrast, in the eight years preceding 2008 (2001-2008), regional employment increased by 273,000 or 6%.
- 3.18 Bearing in mind the caveats outlined above, it is possible to apply the projected district and regional increases, modelled respectively in 2005 and 2008, to the actual employment figures for Cherwell in the relevant years.

Table 3-15: Application of Employment Projection Models to Cherwell

Total Employment Cherwell	Projection Model Applied (and % increase)	Relevant Years	Resultant Projected Increase and timescale
65,591 (ABI 2006)	IER Employment Projections for the South East (projected 16.3% increase – Cherwell)	2006 – 2026	Projected increase of 10,691 to 76,282 employment jobs by 2026
67,102 (ABI 2008)	LEFM SE Projections (projected 2% increase – South East)	2008-2020	Projected increase of 1,342 to 68,444 employment jobs by 2020

Source: SQW

¹⁷ Institute for Employment Research, University of Warwick. *Employment Projections for the South East of England*. March 2005

¹⁸ SQW for Hampshire County Council. *Hampshire Economic Assessment, 2010. Consultation Draft*. Available at http://www3.hants.gov.uk/business/economic_data/economicassessment.htm

4: Business performance and competitiveness

- 4.1 This chapter presents the evidence relating to business performance and competitiveness. It begins with an analysis of secondary data relating to: business start up activity and survival rates; a comparison of job vacancies and occupational characteristics; the availability of business space and premises; and an assessment of the incidence of environmentally sustainable and low-carbon business practice. The chapter then ends by presenting the qualitative findings of a series of consultations with businesses currently located in Bicester.
- 4.2 Through this data, it is possible to identify the following key findings:
- the number of active enterprises in Cherwell relative to the working age population is low, compared to neighbouring districts and South Oxfordshire. However, the number of **new enterprises per 10,000 popn is high – implying a high rate of start ups but also a relatively high proportion of larger firms**
 - **business survival rates in Cherwell are relatively high after 1 year (93.9%)**, compared with Oxfordshire, regional and national rates. **In the longer term – up to 5 years – survival rates in Cherwell remain above the regional and national averages** but fall below the average for Oxfordshire. Just over half the business start ups in Cherwell survive for more than 5 years
 - **a high proportion of Cherwell’s vacancies are in elementary occupations**, compared to comparator districts, and a low proportion are in professional and technical occupations (and very low in “skilled trades”)
 - **there is an occupational mismatch between vacancies notified to JCP and those available amongst residents**, although this type of analysis needs to be wary of what types of jobs are advertised through JCP
 - compared with Oxfordshire as a whole, **Cherwell has a relatively large proportion of allocated land designated for manufacturing and storage uses, and a relatively small proportion for offices**. However, **Bicester (in contrast to Banbury) has very little land allocated for industrial use and one major site with planning permission for office use, but where the permission has not been implemented**
 - the land study undertaken in 2006 found that the **commercial premises in Bicester are generally in ‘good condition’, but a high proportion is over 40 years old and, based on our consultations, firms generally regard it as dated and unsuitable for modern business use**
 - **land and buildings for commercial use are relatively expensive in Cherwell compared with similar districts elsewhere**. However, the prices in Cherwell are typical of Oxfordshire as a whole. **Retail space is particularly expensive, but this may be due to the effect of Bicester Village**

- **per capita CO₂ emissions are relatively high (8.5t), although this is mostly industrial and commercial.** Much of this may be related to a high average level of commercial and industrial gas consumption. **Per capita reduction since 2005 appears to be strong, but it is unclear whether this is because businesses are becoming more efficient, or because some high emission businesses have closed**
- based on the views of a sample of businesses in Bicester it is apparent that while Bicester is a **strategic business location with good transport links and a reasonable labour supply** the availability of reasonable **quality business space was felt to be poor, with a number of firms which expect to grow over the next few years expecting to have to relocate to other towns in the area (Aylesbury, Banbury and Buckingham were the main possibilities) in order to find suitable space**
- the businesses noted that they **needed a range of different services and facilities** including fast broadband, easy access to facilities, high quality build stock, as well as a mix of office, manufacturing (some of which should be specialist and tailored to the firm's specific needs) and storage space
- a **number of potential opportunities for collaboration were also identified** including marketing benefits and benefits from locating on the site. More broadly there was also general interest in the eco-town and both its prospects and potential impacts.

Business start-up activity – company births and deaths, VAT registrations across the sub-region

- 4.3 Table 4-1 draws on data from the Business Demography dataset and Mid-Year Population Estimates dataset (both 2008) to provide information on the total number of businesses, and business density in Cherwell and comparator areas. The measure 'active enterprises per 10,000 working age residents' gives a measure of the density of existing stock. The measure 'new enterprises per 10,000 working age residents' compares the rate of new businesses start ups to the resident population. The later of these measures is shown at Figure 4-2 and the former at Figure 4-1.

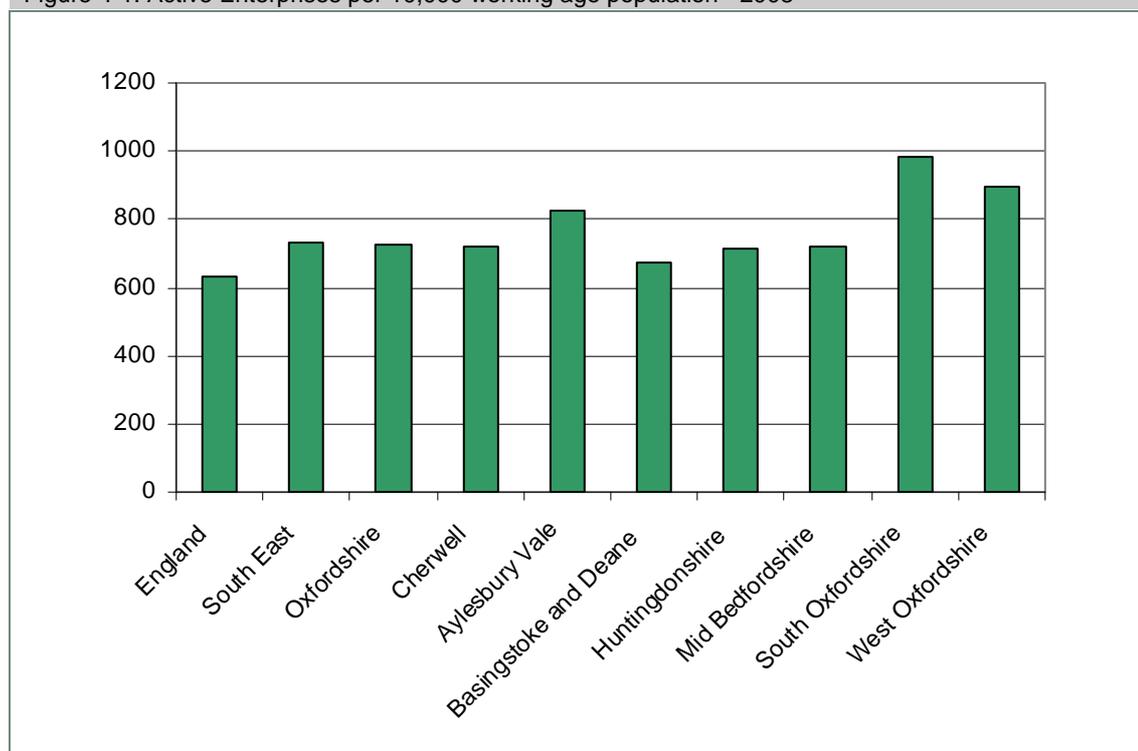
Table 4-1: Business Stock and New Enterprises - 2008

	Working Age Population	Active Enterprises	Active enterprises per 10,000 working age population	New Enterprises	New enterprises per 10,000 working age population
England	31,956,000	2,024,990	633.7	238,895	74.8
South East	5,112,400	372,810	729.2	40,745	79.7
Oxfordshire	400,700	29,075	725.6	3,020	75.4
Cherwell	86,800	6,245	719.5	715	82.4
Aylesbury Vale	106,600	8,810	826.5	920	86.3

	Working Age Population	Active Enterprises	Active enterprises per 10,000 working age population	New Enterprises	New enterprises per 10,000 working age population
Basingstoke and Deane	102,100	6,900	675.8	825	80.8
Huntingdonshire	102,200	7,285	712.8	700	68.5
Mid Bedfordshire	84,700	6,100	720.2	720	85.0
South Oxfordshire	78,000	7,660	982.1	515	84.4
West Oxfordshire	61,000	5,460	895.1	765	98.1

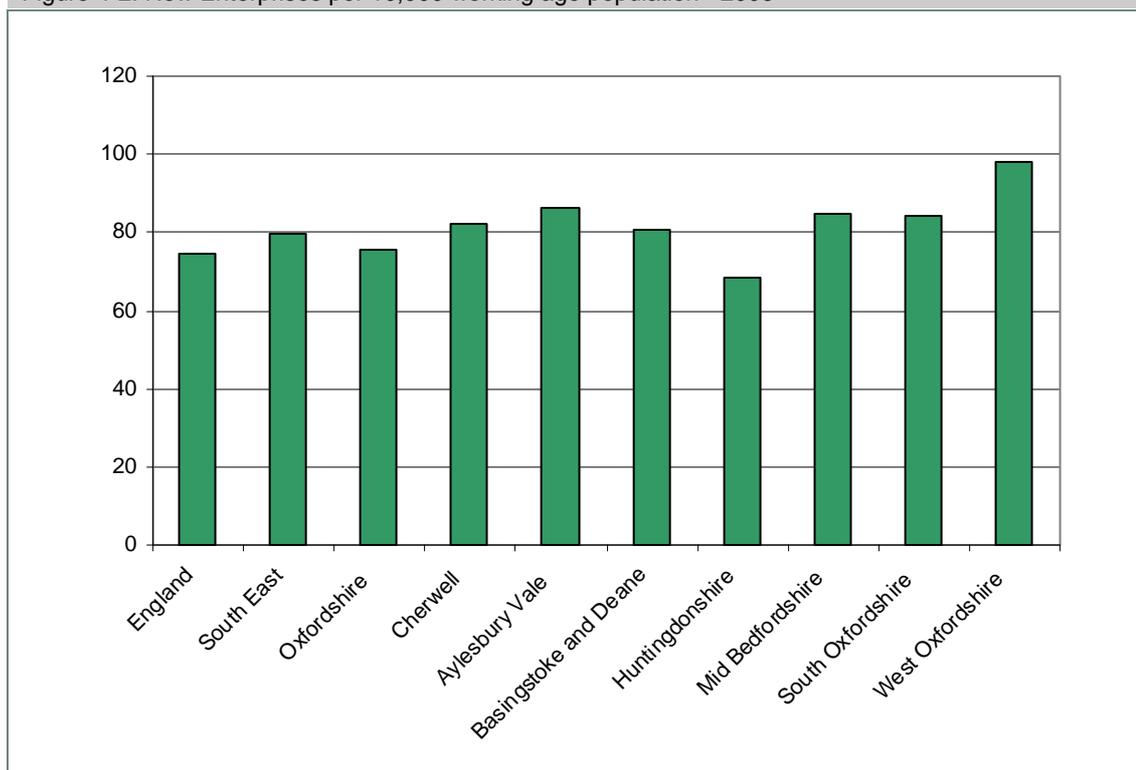
Source: Business Demography 2008 and Mid Year Population Estimates 2008

Figure 4-1: Active Enterprises per 10,000 working age population - 2008



Source: Business Demography 2008 and Mid Year Population Estimates 2008

Figure 4-2: New Enterprises per 10,000 working age population - 2008



Source: Business Demography 2008 and Mid Year Population Estimates 2008

- 4.4 Table 4-2 provides another perspective in relation to changes within the business base. Here the focus is on business births as a percentage of the overall stock. A higher percentage of births might indicate an increasing overall stock (unless the proportion of deaths is equally high) but might also indicate churn or more volatility.

Table 4-2: Business births as a percentage of active enterprises

	Births as a % of active enterprises
England	11.8 %
South East	10.9 %
Oxfordshire County	10.4 %
Cherwell	11.4 %
Basingstoke and Deane	12.0 %
Huntingdonshire	9.6 %
Mid Bedfordshire	11.8 %
Aylesbury Vale	10.4 %
West Oxfordshire	9.4 %
South Oxfordshire	10.0 %

Source: Business Demography 2008

Business survival rates and business incubation activity

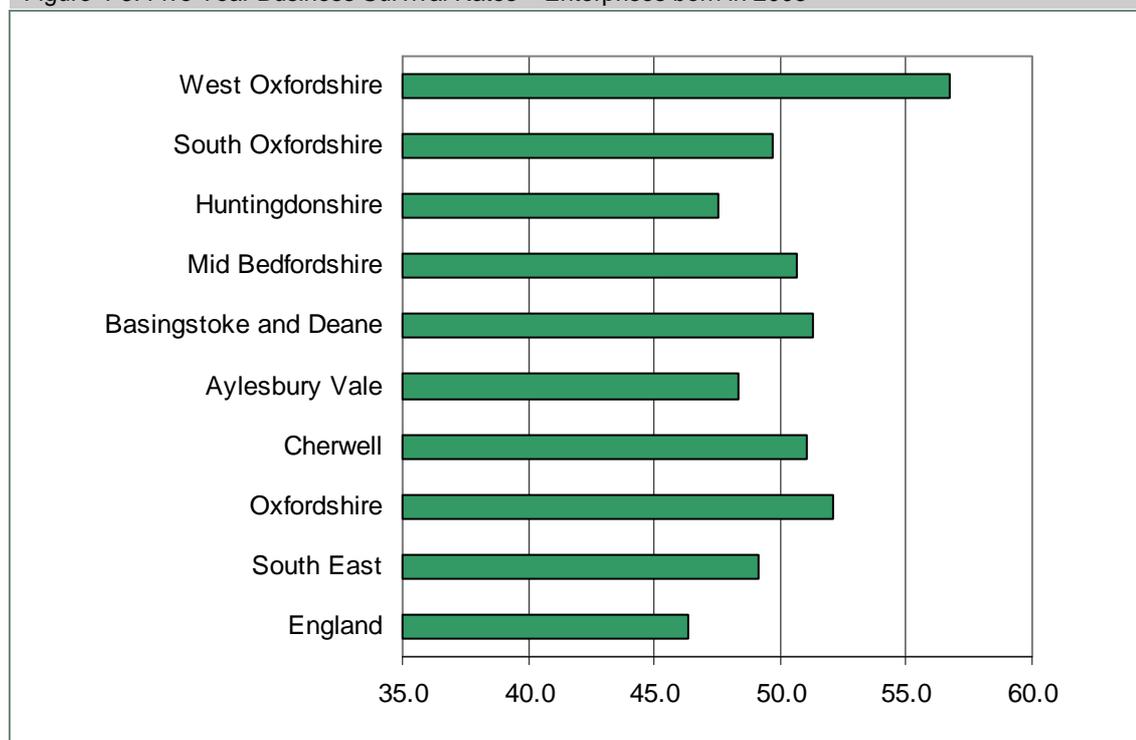
- 4.5 Business Demography provides a useful measure of the survival rates of enterprises ‘born’ in the last five years. The time-series data presented below shows the survival rates for businesses ‘born’ in 2003, from 2004 (year 1) through to 2008 (year 5). A higher five year survival rate suggests a stronger or healthier overall business environment, which allows newly-established businesses to survive.

Table 4-3: Business Survival Rates – Enterprises born in 2003

	Births (2003)	1 Year per cent	2 Year per cent	3 Year per cent	4 Year per cent	5 Year per cent
England	236,220	92.6	77.9	63.5	54.1	46.4
South East	41,855	93.3	80.1	66.3	56.7	49.1
Oxfordshire	3,185	93.2	80.7	68.8	59.7	52.1
Cherwell	735	93.9	78.9	66.7	57.8	51.0
Aylesbury Vale	1,065	92.5	77.5	64.3	55.4	48.4
Basingstoke and Deane	770	94.2	82.5	68.8	57.8	51.3
Mid Bedfordshire	740	93.2	81.1	69.6	60.8	50.7
Huntingdonshire	800	91.3	77.5	65.6	56.3	47.5
South Oxfordshire	835	93.4	82.0	68.9	58.1	49.7
West Oxfordshire	555	91.9	82.0	73.0	64.0	56.8

Source: Business Demography 2008

Figure 4-3: Five Year Business Survival Rates – Enterprises born in 2003

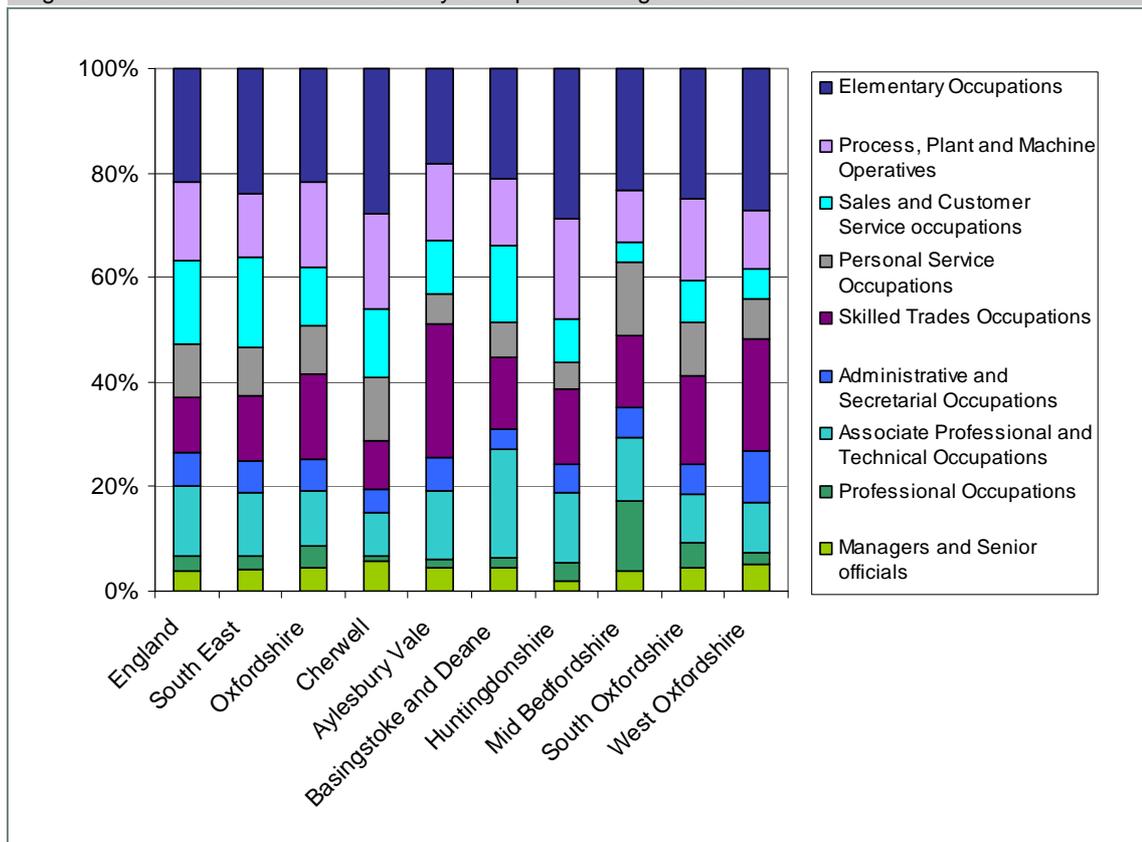


Source: Business Demography 2008

Job vacancies compared with the occupations of residents

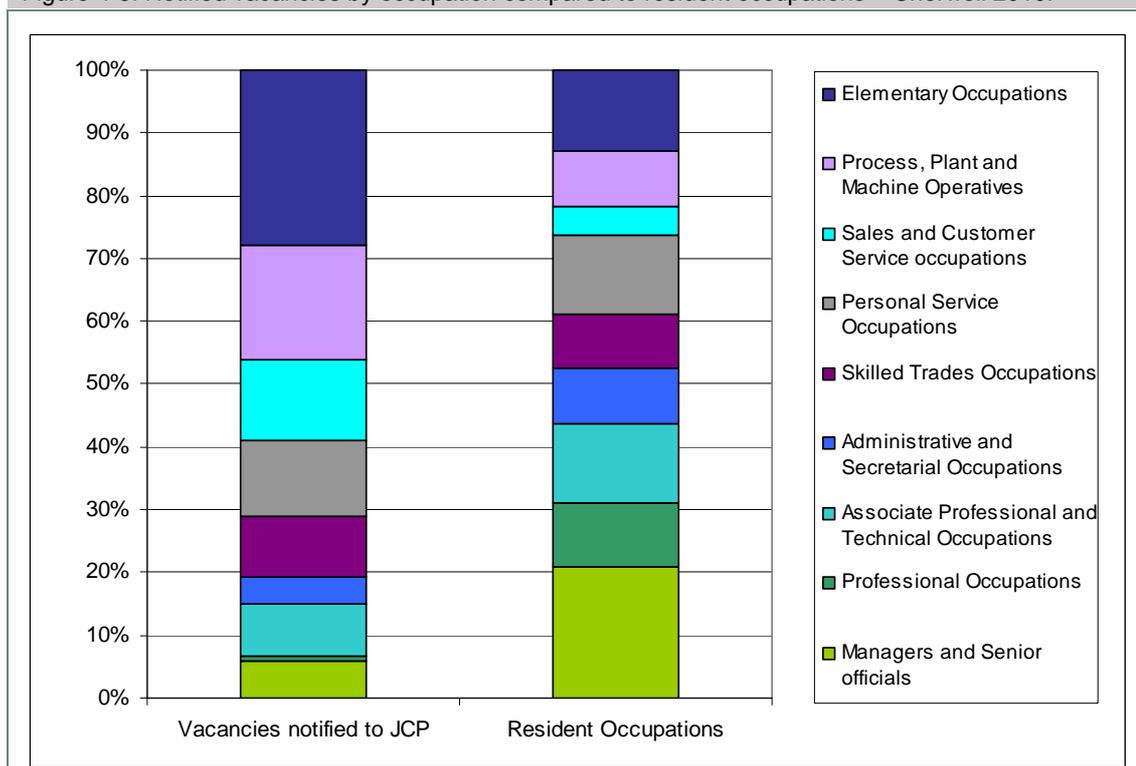
- 4.6 When examining the ‘sustainability’ of an economy, it is often useful to look at the extent to which the local labour market matches the local labour force (i.e. residents). If the labour market is well matched to the resident population, then an economy is deemed to be more sustainable. The term sustainable is used because in more balanced economies, the need for workers to commute long distances or business to re-locate or hire outside of the local labour pool are likely to be minimised. One way of comparing these issues is to look at whether the jobs being advertised locally are suitable or of relevance to the local population as examined by the two figures below (Figure 4-4 and Figure 4-5). The first looks at the broad occupational groupings of jobs being advertised by JobCentre Plus (JCP) in Cherwell and comparators in 2010. Using this data, and three yearly averaged data from the Annual Population Survey, the second looks at whether vacancies are well-matched to resident occupations.
- 4.7 Of course, this measure is at best a very rough proxy. Firstly, the occupation of those already in employment is perhaps not the best comparator, because the ‘occupational capability’ of job-seekers will also be relevant. And secondly, vacancies notified to JCP tend to be weighted towards the elementary, manual and service end of the occupational spectrum. The advertisement of higher-occupational level jobs for example is not always picked up by JCP.

Figure 4-4: Vacancies notified to JCP by Occupation – August 2010



Source: Jobcentre Plus notified vacancies. 2010

Figure 4-5: Notified vacancies by occupation compared to resident occupations – Cherwell 2010.



Source: Jobcentre plus notified vacancies 2010 & Annual Population Survey 2010

Availability of business space and premises

- 4.8 The Department for Communities and Local Government (DCLG) publishes a series of ‘rateable value statistics’ which provide various estimates of commercial and industrial floorspace across England. The latest data is from 2008, and is available at district level – i.e. Cherwell. The data is banded according to usage type, the four most relevant being retail, office, factory and warehouse. The data provides a count of total properties under each usage type, as well as square meterage and estimated price per square meter.
- 4.9 The proportions of total floorspace allocated to each usage type provide a useful measure of how a district’s employment land is proportionally divided. In some districts, floorspace is weighted towards retail and office uses, and for others, warehousing or factories for example. The price per M2 gives an indicator of how the local property market values each different type of floorspace. This data is shown in the following tables and figures.

Table 4-4: Commercial and Industrial Floorspace (Retail & Offices) - 2008

	Retail			Offices		
	Count	M2 total (000s)	£ per M2	Count	M2 total (000s)	£ per M2
England	516809	100208	130	669426	195131	121
South East	73202	14956	138	106608	31534	109
Oxfordshire	4970	1060	143	9712	2727	111
Cherwell	1106	283	160	1986	465	99

	Retail			Offices		
	Count	M2 total (000s)	£ per M2	Count	M2 total (000s)	£ per M2
Aylesbury Vale	953	227	134	1608	442	64
Basingstoke and Deane	796	264	164	2406	1024	85
Huntingdonshire	980	201	110	1764	455	93
Mid Bedfordshire	703	113	94	1294	232	79
South Oxfordshire	958	167	110	1946	427	98
West Oxfordshire	733	116	119	1588	242	107

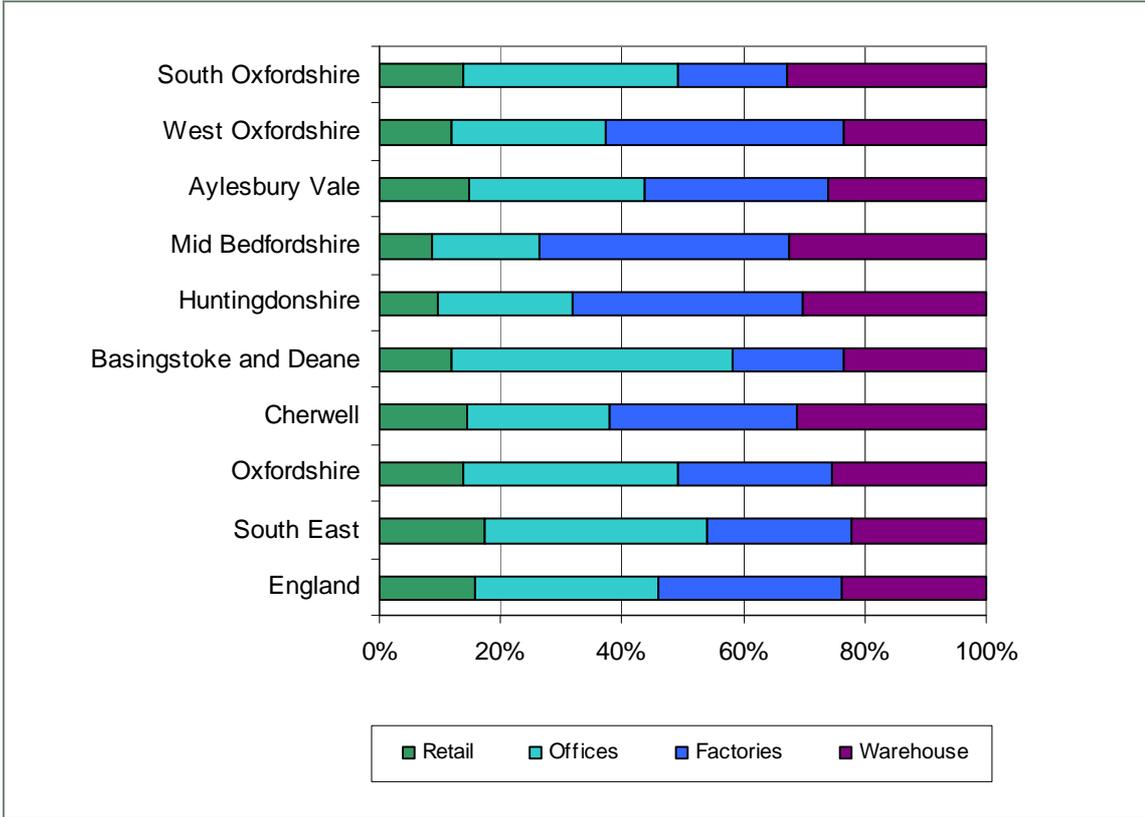
Source: CLG Commercial and Industrial Floorspace and Rateable Value Statistics (2005 revaluation), 2008

Table 4-5: Commercial and Industrial Floorspace (Factories & Warehouses) - 2008

	Factories			Warehouses		
	Count	M2 total (000s)	£ per M2	Count	M2 total (000s)	£ per M2
England	245263	192322	29	194572	152485	40
South East	35325	20377	40	28013	19042	52
Oxfordshire	2626	1937	39	2326	1963	46
Cherwell	693	610	42	539	615	45
Aylesbury Vale	932	459	35	786	399	43
Basingstoke and Deane	663	406	38	428	517	50
Huntingdonshire	943	787	38	747	624	42
Mid Bedfordshire	737	536	35	496	421	41
South Oxfordshire	597	220	37	543	397	37
West Oxfordshire	709	378	42	421	227	47

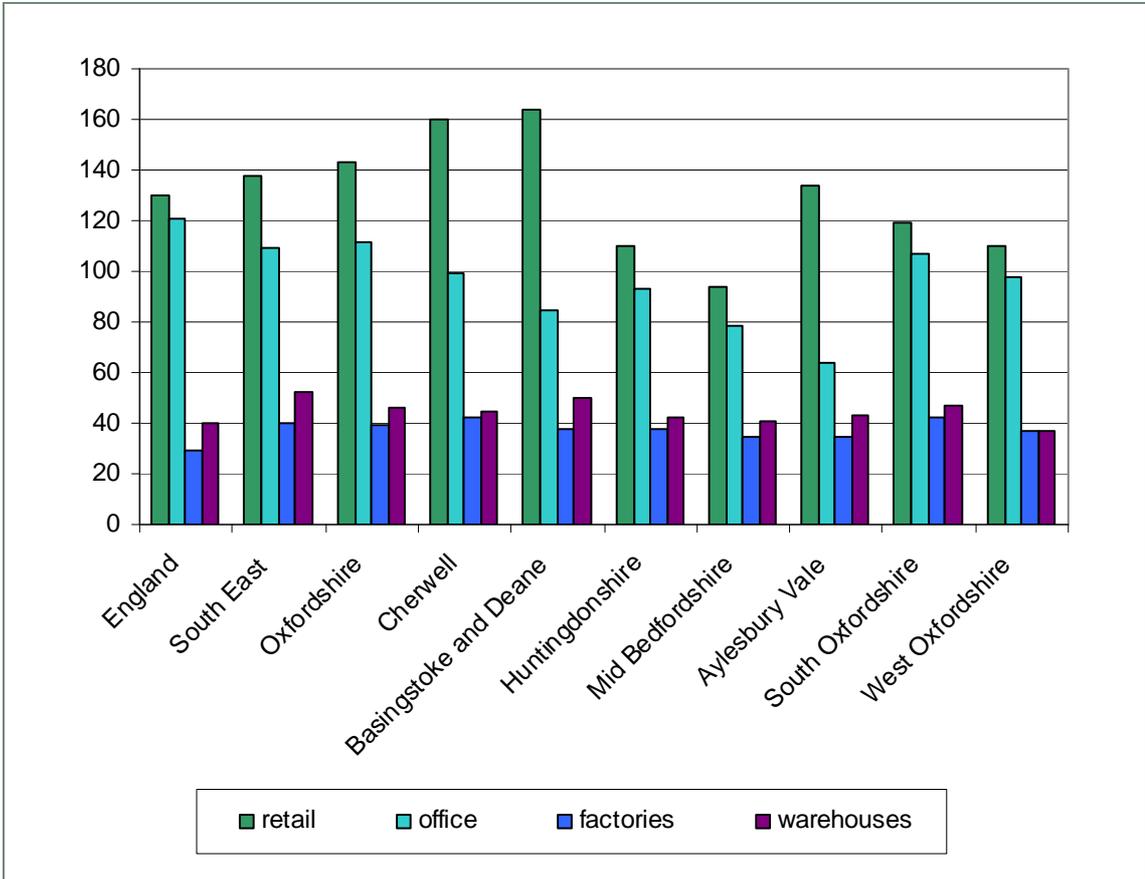
Source: CLG Commercial and Industrial Floorspace and Rateable Value Statistics (2005 revaluation), 2008

Figure 4-6: Commercial and Industrial Land Allocation (by M2s) - 2008



Source: CLG Commercial and Industrial Floorspace and Rateable Value Statistics (2005 revaluation), 2008

Figure 4-7: Value of commercial and industrial land - £ per M2 (2008)



Source: CLG Commercial and Industrial Floorspace and Rateable Value Statistics (2005 revaluation), 2008

Incidence of environmentally sustainable and low-carbon business practice

Emissions and Energy Consumption

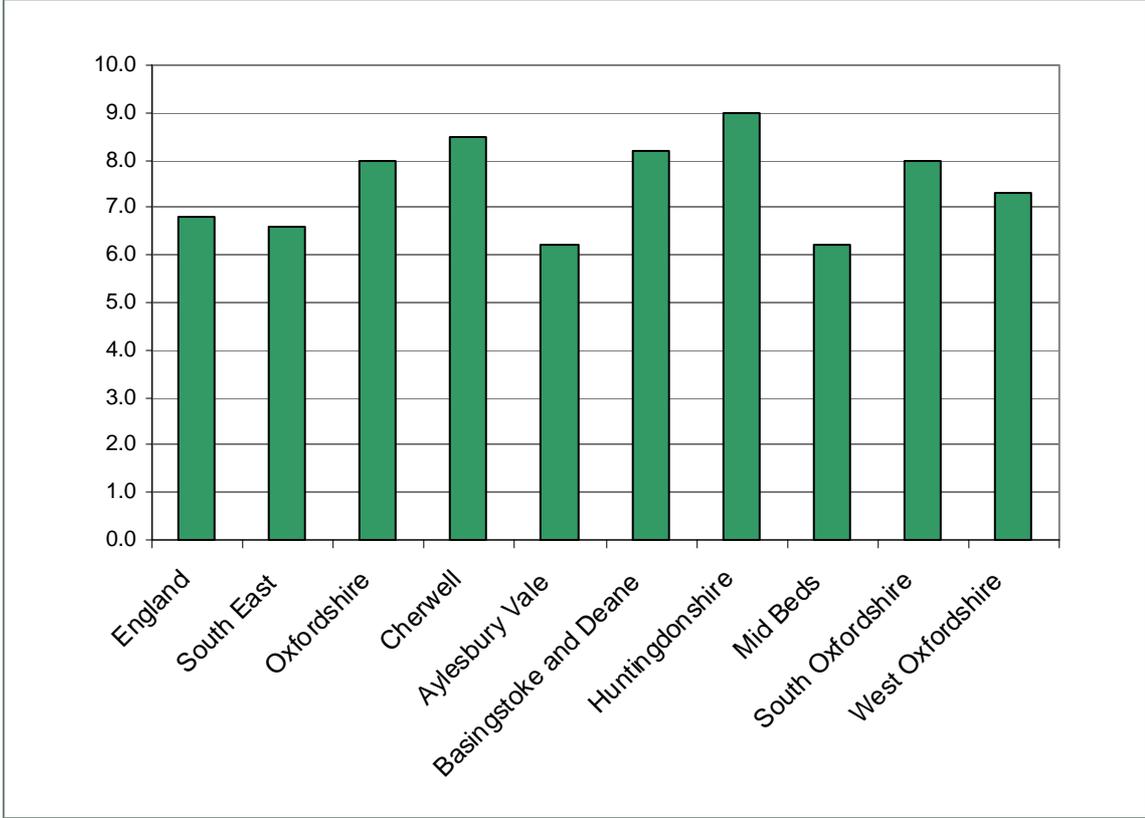
- 4.10 Per capita emissions of Carbon Dioxide (see Table 4-6 and Figure 4-8 and Figure 4-9) were assessed under the (former) National Indicator Set (NIS) for Local Strategic Partnerships (LSPs) and local authorities. Published by the Department for Energy and Climate Change (DECC), National Indicator 186 also divides emissions into three broad categories (industry and commercial, domestic and road transport). Per capita emissions are a useful measure because they allow for a comparison of economies of different sizes. However, economies with smaller populations relative to workers (i.e. economies with in-commuting) are arguably more likely to demonstrate higher rates of per capita emissions and visa versa. Figure 4-10 shows how Per Capita CO₂ Emissions have reduced since 2005.

Table 4-6: Per Capita CO₂ Emissions (National Indicator 186) - 2008

	Industry and Commercial	Domestic	Road Transport	Total	Per Capita Emissions (t)	% per capita reduction since 2005
England	142,676	122,025	82,834	347,536	6.8	5.6 %
South East	20,104	20,295	14,439	54,837	6.6	4.3 %
Oxfordshire	2,055	1,620	1,387	5,062	8.0	3.6 %
Cherwell	482	351	350	1,183	8.5	7.6 %
Aylesbury Vale	330	402	340	1,071	6.2	7.5 %
Basingstoke and Deane	480	424	419	1,323	8.2	4.7 %
Huntingdonshire	510	385	587	1,482	9.0	7.2 %
Mid Beds	257	299	283	839	6.2	6.1 %
South Oxfordshire	406	370	260	1,036	8.0	1.2 %
West Oxfordshire	235	292	223	750	7.3	6.4 %

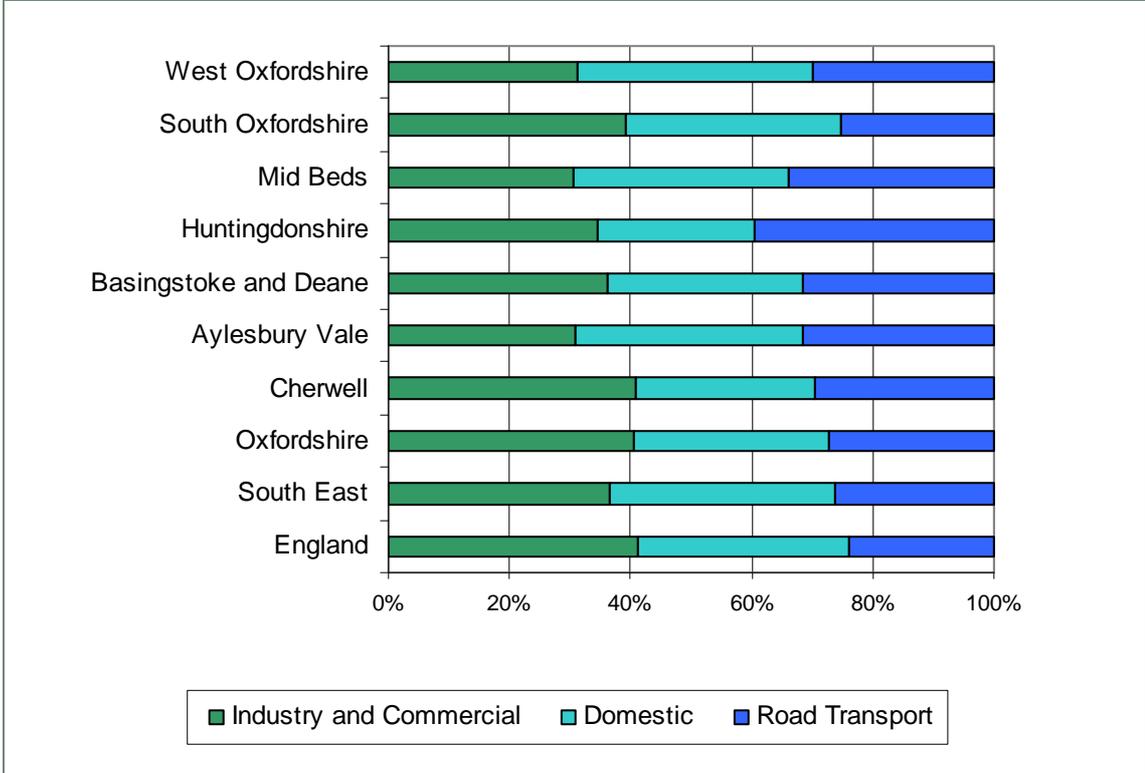
Source: DECC, Per Capita CO₂ Emissions in the LA area, sector and fuel details. 2008

Figure 4-8: Per Capita CO2 Emissions (t) - 2008



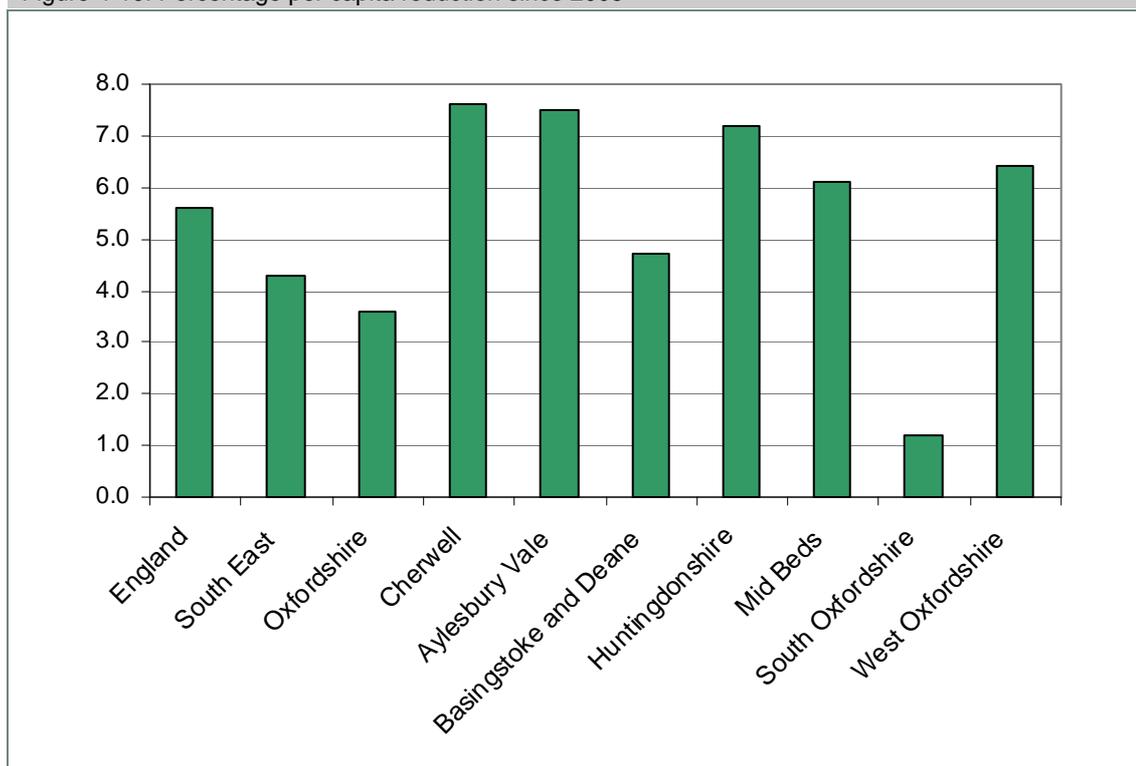
Source: DECC, Per Capita CO2 Emissions in the LA area, sector and fuel details. 2008

Figure 4-9: CO2 Emissions (t) by Source - 2008



Source: DECC, Per Capita CO2 Emissions in the LA area, sector and fuel details. 2008

Figure 4-10: Percentage per capita reduction since 2005



Source: DECC, Per Capita CO2 Emissions in the LA area, sector and fuel details. 2008

- 4.11 Another relevant aspect of resource consumption is that of electricity and gas. Consumption statistics for both are provided again by DECC, but this time by individual meter. In the case of domestic consumers, it is likely that one meter is equal to one household, but this is not necessarily the case for larger workplaces (commercial and industrial consumers). Some very large workplaces and power stations are factored out to allow for a more robust comparison across areas.
- 4.12 Generally speaking, when looking at gas, overall total consumption is weighted more towards domestic consumers, and with electricity, more towards industrial/commercial consumers.

Table 4-7: Gas Consumption – Domestic and Commercial/Industrial – 2008

	Domestic consumers		Commercial and industrial consumers		Sales per consumer (kWh)	
	Sales 2008 - GWh	Number of consumers (000s)	Sales 2008 - GWh	Number of consumers (thousands)	Average domestic consumption	Average commercial and industrial consumption
Great Britain	377,472.5	22,327.1	208,982.2	324.2	16,906	644,556
South East	52,375.8	3,076.9	22,149.7	48.2	17,022	459,966
Oxfordshire	3,606.7	207.1	2,300.6	4.0	17,415	573,005
Cherwell	695.6	42.8	701.3	0.7	16,261	1,040,440
Aylesbury Vale	932.9	52.9	321.6	0.7	17,648	438,093
Basingstoke and Deane	922.5	57.3	516.2	0.7	16,109	706,138

	Domestic consumers		Commercial and industrial consumers		Sales per consumer (kWh)	
Huntingdonshire	950.7	58.1	358.0	0.7	16,355	543,999
Mid Bedfordshire	762.6	45.9	197.4	0.5	16,606	415,492
South Oxfordshire	789.3	42.5	255.8	0.8	18,556	334,821
West Oxfordshire	574.7	32.4	156.4	0.4	17,763	348,345

Source: DECC - Sub-national gas sales and numbers of customers, 2008

Table 4-8: Electricity Consumption – Domestic and Commercial/Industrial – 2008

	Domestic consumers		Commercial and industrial consumers		Sales per consumer (kWh)	
	Sales 2008 - GWh	Number of MPANs (000s)	Sales 2008 - GWh	Number of MPANs (thousands)	Average domestic consumption	Average commercial and industrial consumption
Great Britain	112,530.5	26,805.2	192,094.5	2,406.9	4,198	79,809
South East	16,513.3	3,634.7	23,942.6	332.6	4,543	71,984
Oxfordshire	1,292.7	270.8	2,522.9	28.0	4,773	90,027
Cherwell	280.6	58.3	492.9	5.5	4,814	89,283
Aylesbury Vale	343.5	70.5	331.6	5.9	4,875	56,216
Basingstoke and Deane	316.5	69.2	592.5	5.4	4,575	108,919
Mid Bedfordshire	258.4	55.3	294.3	4.1	4,673	71,143
Huntingdonshire	321.2	70.2	573.0	6.4	4,575	89,770
South Oxfordshire	303.4	57.7	573.8	5.9	5,258	97,262
West Oxfordshire	229.8	46.4	294.8	5.1	4,953	57,991

Source: DECC – Electricity consumption at regional and local authority level, 2008

The views of Bicester’s businesses

- 4.13 In order to understand more about the business landscape in Bicester in-depth interviews were carried out by telephone with 15 firms across high-tech, manufacturing, eco, construction and professional/business services sectors. The interviews were with directors, office managers and those responsible for location decisions.
- 4.14 Most of the 15 firms were Bicester-based, although a few were branches of national companies or the UK base for international companies. In terms of historic growth, some of the firms had experienced recent growth, a few were shrinking – largely due to the recession – and some were in stasis. The firms comprised a mix of tenure with most under a tenancy agreement but a few were owner occupiers. The majority of the firms (other than recent start-ups) had been in Bicester for a long period of time.

- 4.15 The businesses were asked a range of questions relating to **Bicester as a business location**, including their views on: Bicester itself, the labour supply; the quality of the building stock; transport; infrastructure and the business environment. A summary of the findings on each of these topics is presented under the relevant headings below

Bicester itself

- Bicester was seen as cheaper than Oxford largely in terms of rental stock, but also in the ability to pay expected wage demands of higher-skilled staff
- many firms chose Bicester because of its central location within the country. There were a few examples of those who wished to be near to suppliers, and there were two examples – in the high-tech sector – of those for whom proximity to Oxford was important
- for those firms who started in Bicester, it was usually because the founders lived there or nearby. For those firms who moved to Bicester, decisions were taken because of location and/or price
- there was a general recognition that Bicester was full of out-commuting residents, and a perception that it would be a 'good thing' for the vibrancy of the town to try to retain more of these to work in Bicester. It was felt that this may also help to attract new businesses.

Labour supply

- most of the firms spoken to source all, or the vast majority, of their staff from Bicester and surrounding villages. Those who commuted in were higher-level managers (the furthest commute was from Chester!)
- local labour supply was deemed reasonable, with a good range of skills (particularly basic skills). Some firms felt they had to look further afield for managerial or technical skills, but that this was to be expected wherever the location. One firm reported having to 'ship in' temporary labour from Banbury (as a result of a shortage of people in Bicester willing to work over the weekend)
- it was noted that Bicester needs attractive, period properties or new executive homes to enable local firms to recruit locally for top jobs
- all of the companies (bar one) felt that it would be difficult to move far from Bicester, due to their established – often specifically trained – workforce. Likewise, some manufacturing firms have invested heavily in their properties and capital stock, and would therefore be very unwilling to move
- one firm reported that the nearby army development has provided several well-trained staff who are used to working in a warehouse environment
- there was one mention of a particular negative experience of recruiting via JC+.

Building stock

- the quality of unit was felt to be important, but most consultees considered the general quality of built stock in Bicester (both available and occupied) to be very poor. The Wedgwood Road, Murdock and Churchill road estates were all specifically mentioned as run-down
- it was noted that there is a definite shortage of quality stock – across both offices and commercial units – evidenced by low availability, with one firm reporting it to be “very easy” to rent office space of average quality. It was felt that there is also a specific shortage of large stock of any quality
- although many want to move from their current premises, most do not want to move far. However, they can't see good options to move to within Bicester, causing a ‘Catch-22’ situation
- it was noted that many of the estates are located quite far from shops and/or cafes
- some concern about the local planning system was raised by consultees and, in particular, that some industrial estates may be converted to housing allocation. Others indicated specific areas of land that they would consider building new premises were they to be designated as employment land
- one firm is moving to Banbury, due to lack of premises.

Transport

- firms stated that they choose Bicester because of its central location, good transport routes (rail and road) and easy access to all parts of the country, including London. This is true of those which rely on imports and couriers, as much as those which need access to visit clients
- congestion on the M40 at Jct 9 (and Jct 10) however was frequently cited as a particular problem
- another issue was raised around inadequate provision of HGV parking, particularly at peak times
- lack of car parking spaces linked to employment locations was also cited by many, although no simple solutions were proposed, and most seemed to accept that this was a 'fact of life'
- good public transport was not really taken into consideration by any of those interviewed (except for the rail link from Bicester to London), and it would seem that good public transport links from NW Bicester into town would not initially be sufficient to attract firms (who would be more interested in car parking provision).

Infrastructure and business environment

- generally soft infrastructure was perceived to be adequate in Bicester. With business networks reported to have been useful for securing very valuable contracts locally. The Wednesday business club for SMEs was also mentioned, as well as the main Bicester business network
- current business support (e.g. business networks) was thought to focus on the retail sector. A greater representation of the industrial/commercial sectors would therefore be a useful addition
- Bicester Innovation Centre was also mentioned as a useful resource for start-up companies
- physical infrastructure – was sometimes over-pressured (e.g. blips in electricity supply) which was a particular problem for firms in the manufacturing sector, or heavy internet users. As a result, some firms now have installed back-up generators for these circumstances
- broadband reliability was seen by some as poor, and patchy
- the state of the economy was also mentioned as a more general constraint to growth.

Business needs

4.16 More specifically, in terms of **what the businesses wanted**, the following points were noted:

- ultra-fast Broadband (and possibly two lines, to use as a back-up)
- easy access to facilities – e.g. shopping and eating facilities
- quick access for couriers and deliveries
- high quality built stock – e.g. somewhere they would be proud to invite clients to – with some demand for eco-credentials in the buildings where this is relevant to companies' core product/service as there is a definite lack of this locally
- many firms require a mix of both office and manufacturing space with others requiring storage space (particularly as Bicester is such a good central location, although, low cost is key for this and could be a problem)
- Some manufacturing firms – particularly in the high-tech sector – require specialised manufacturing space, and therefore would have to specify the design and/or spend significant amounts on retrofitting.

Opportunities for collaboration with eco-development

4.17 With the following **specific opportunities for collaboration with eco-development**, noted:

- several firms saw a specific positioning/marketing benefit associated with being linked to the eco-town

- there was some interest from companies in specifically locating on the eco-development, although this did not always tie in to 'appropriate' timings for firms wishing to move premises (either due to the need to rapidly expand, or not wishing to get tied into another lease arrangement on current premises)
- many firms spoken to – particularly in high-tech and manufacturing sectors – do not see themselves as “environmental” and do not see the relevance for their business, as such they would only consider moving to NW Bicester if it fitted other criteria (cost, specification, etc.)
- there is particular interest in the eco-development from those companies located in close proximity as there is both excitement about the prospect and some concern about the impact on congestion and traffic
- the Oxford Brookes link was mentioned by one firm as a particular interest
- another firm discussed potential use of their waste product with high sugar levels in the eco-development, which could be really useful as a biofuel, for generating green energy on-site
- it was noted that logistics are a big eco-issue – i.e. lots of lorries running empty, but it is 'impossible' to get big brand names to share lorry-loads – and the question was raised as to whether this is an opportunity for the eco-development to support better / more efficient practices?

5: Education, Skills and Training

- 5.1 This chapter presents the evidence relating to education, skills and training. It includes secondary data analysis as well as qualitative commentary around GCSE and A-Level attainment; post 16 destinations to further and higher education; and the uptake of a variety of forms of training.
- 5.2 Through the analysis, it is possible to identify the following key findings:
- **educational attainment in Cherwell is mixed.** General attainment at GCSE level is in line with the South East average, but if Maths and English are included, the **success rates fall below the averages for Oxfordshire, the SE region and all comparator districts** (though it remains above the national level). Historically, rates of GCSE attainment were low, but there is evidence that they have been improving at a faster rate than other comparators, and are now only slightly below average. Attainment at A level and equivalent was the lowest of all Oxfordshire districts in 2008/09, but 2010 data suggests point scores have improved to just below the county average
 - the most up to date information (November 2010, Oxfordshire County Council) on rates of participation for post-16 year olds for puts **the proportion of 16-18 year olds Not in Education, Employment or Training (NEET) in the Bicester and Kidlington area at 5.2 percent of young people compared with 6.1% for the county as a whole**
 - **training rates amongst employed population in Cherwell fell between 2006** (scoring neither high nor low against comparators) and 2009 (low, against its comparators, with just 18.1% of the employed population receiving training in the last quarter)
 - **9.4 % of the working age population has no qualifications**, lower than regional and national averages. **Almost a third (29.9%) have NVQ4+ qualifications, nearly 5% points below Oxfordshire.**

GCSE attainment and A Level attainment

- 5.3 The Department for Education (DfE) publishes a series of annual statistics on pupil attainment across England, including the results of students taking GCSEs and A Levels (or equivalent qualifications). These are available at district level, and can be filtered according to where a pupil goes to school, or where he/she lives. In this case, all data is referenced by the location of pupil residence.
- 5.4 A handful of specific indicators are often used when looking at this sort of educational attainment. The two most often used for GCSE are the proportion of pupils achieving five or more GCSE (or equivalent) passes at the end of Key Stage Four, and the proportion achieving five or more including English and Maths. The latter is sometimes described as ‘the

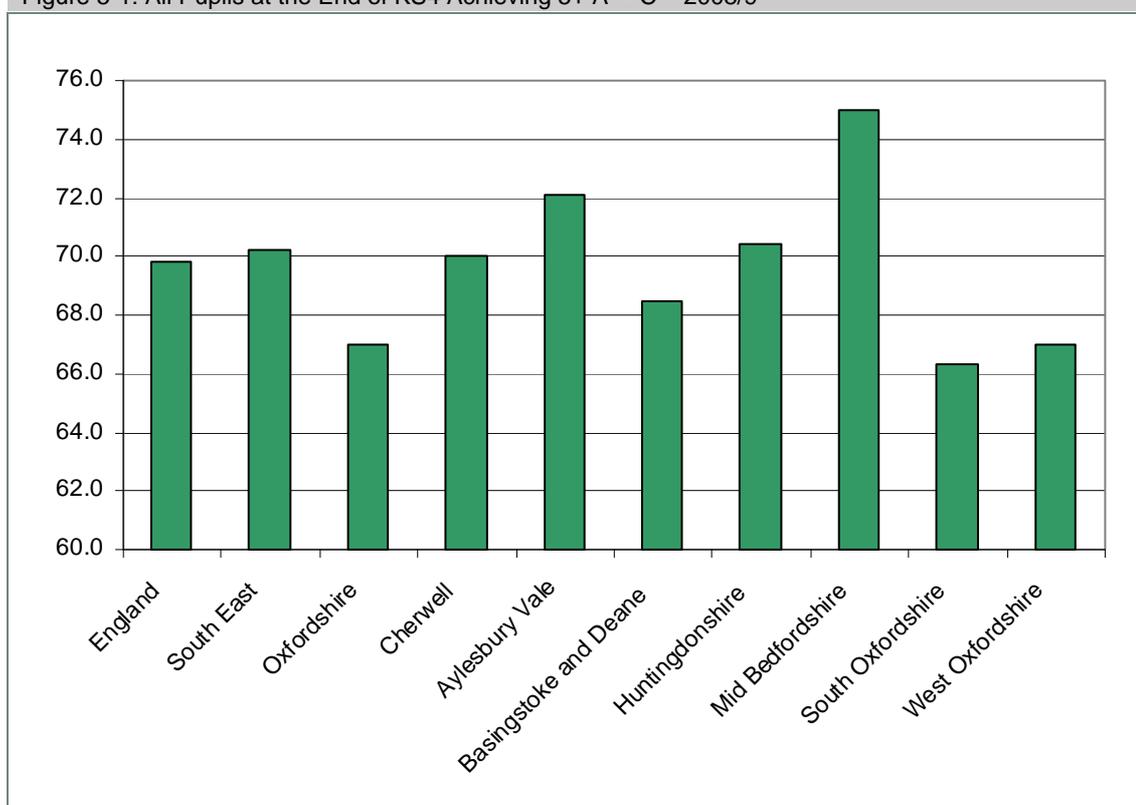
proportion achieving five or more good GCSEs'. In the case of A Level (or equivalent) attainment, the average point score per student is used.

Table 5-1: GCSE and Equivalent Results for Young People (referenced by location of pupil residence) – 2008/9

Area	All Pupils at the End of KS4 Achieving 5+ A* - C	All Pupils at the End of KS4 Achieving 5+ A* - C Including English and Mathematics
England	69.8 %	50.7 %
South East	70.2 %	53.7 %
Oxfordshire	67.0 %	53.1 %
Cherwell	70.0 %	51.4 %
Aylesbury Vale	72.1 %	58.4 %
Basingstoke and Deane	68.5 %	51.5 %
Huntingdonshire	70.4 %	54.9 %
Mid Bedfordshire	75.0 %	57.9 %
South Oxfordshire	66.3 %	54.2 %
West Oxfordshire	67.0 %	57.2 %

Source: DFE 2008/9

Figure 5-1: All Pupils at the End of KS4 Achieving 5+ A* - C – 2008/9



Source: DFE 2008/9

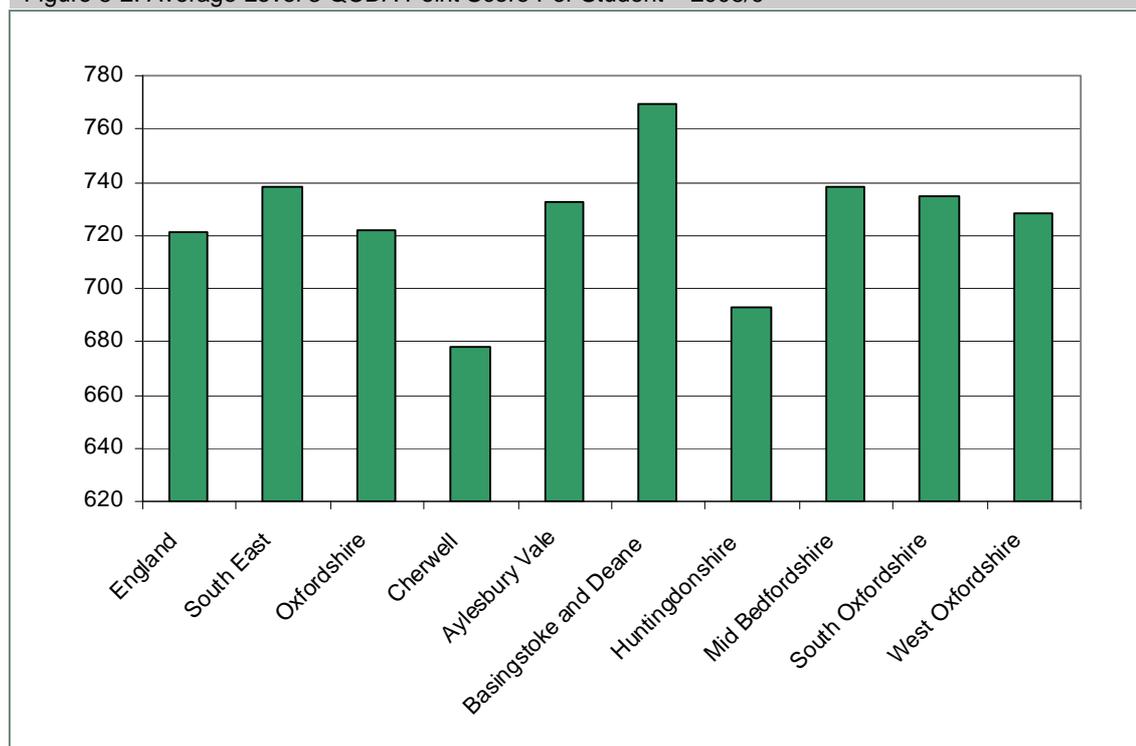
5.5 Further information is provided by Oxfordshire County Council’s paper ‘*About the Bicester Area: Context and Challenges*’, which informs the Closer to Communities Strategy (2010). In 2006, rates of GCSE attainment for Bicester’s secondary schools were lower than the Oxfordshire Average. Attainment of ‘five or more good GCSE’s’ was 21 percent for Bicester Community College and 41 percent for The Cooper School (compared to 57% for Oxfordshire). By 2010, these figures had risen to 55 percent and 57 percent respectively, whilst Oxfordshire’s average remained at 57 percent.

Table 5-2: GCE/Applied GCE/AS and Equivalent Results (Level 3) for Young People (referenced by location of pupil residence) – 2008/9

Area	Average Level 3 QCDA Point Score Per Student
England	721
South East	739
Oxfordshire	722
Cherwell	678
Aylesbury Vale	732
Basingstoke and Deane	770
Huntingdonshire	693
Mid Bedfordshire	738.
South Oxfordshire	735
West Oxfordshire	728

Source: DFE 2008/9

Figure 5-2: Average Level 3 QCDA Point Score Per Student – 2008/9



Source: DFE 2008/9

- 5.6 Some information is again provided by Oxfordshire County Council’s ‘*About the Bicester Area*’ paper, which provides data for Bicester Community College in 2010. The paper reported that in 2010, the average point score for pupils at the college was just below the Oxfordshire average.

Post-16 destinations and progression from compulsory schooling to further and higher education

- 5.7 Statistics on post-16 progression and destinations are drawn from a variety of sources, and are only available at county level. The Department for Education (DfE) provides a measure of the number of young people aged 16-18 estimated to be Not in Employment, Education or Training (NEET) at county level. In 2009, the DfE estimated that 5.8% of this age group were ‘NEET’ across the South East, compared with 6.5% in Oxfordshire. However, the DfE also reported that the current activity status of 5.1% (South East) and 3.1% (Oxfordshire) of this group was unknown.¹⁹ Additional information is provided by Oxfordshire County Council’s ‘*About the Bicester Area*’ paper (2010). According to this source, 5.2 percent of young people in the ‘Bicester and Kidlington area’ were ‘NEET’ in November 2010. This compares to a county-wide average of 6.1 percent for the same year.

Ongoing participation in training by the working age population

- 5.8 Moving onto the working adult population, the extent to which job-related training is prevalent and embedded within local workplaces is also relevant. Higher rates of training are associated with knowledge intensive and higher value sectors. They might also indicate more workplaces that are adaptable and geared towards making the most of changes that might manifest themselves in the wider or local economy (such as increased demand for eco-construction skills for example).
- 5.9 The Annual Population Survey (APS) provides a measure of employees who remember receiving job related training in the last 13 weeks at work. The annual figures are averaged to help minimise errors resulting from low sample sizes at district level.

Table 5-3: Percentage of the employed population ‘receiving training in the last 13 weeks’ – 2006 – 2009 (annual averages)

	2006	2007	2008	2009
England	21.0	20.0	19.5	19.0
South East	23.0	21.5	21.2	20.8
Oxfordshire	22.6	19.0	23.3	20.9
Cherwell	22.7	20.2	22.2	18.1
Aylesbury Vale	20.1	16.9	18.7	18.6
Basingstoke and Deane	27.1	27.5	21.5	23.3
Huntingdonshire	23.0	25.3	23.5	20.7

¹⁹ DfE 2009 – Proportion of 16-18 year olds NEET.

	2006	2007	2008	2009
Mid Bedfordshire	22.3	20.9	20.2	17.5
South Oxfordshire	24.0	18.8	18.5	21.2
West Oxfordshire	20.6	16.5	21.0	18.2

Source: Annual Population Survey 2006-2009

Nature and levels of various skills/qualifications within the working age population

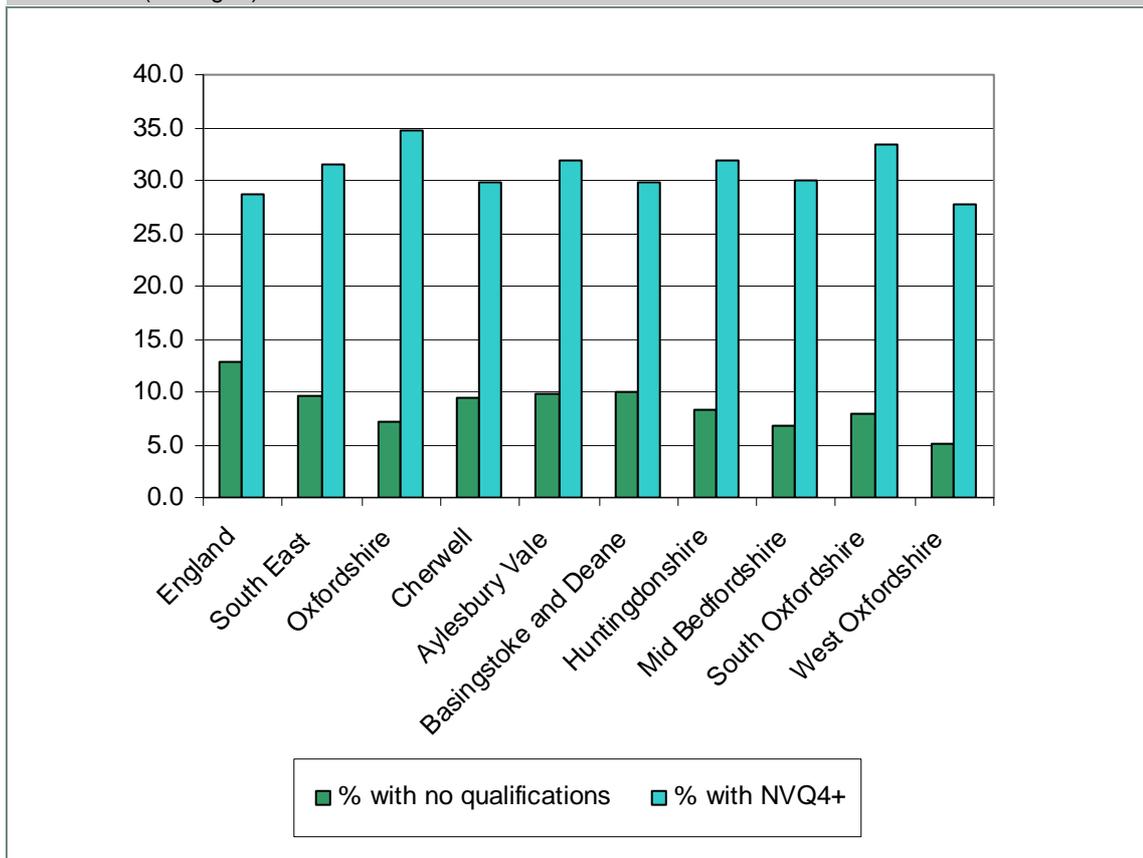
- 5.10 The APS provides another very important measure of the resident workforce, and how it might be aligned or receptive to newly emerging sectors. This measure looks specifically at the skills levels of working age residents in Cherwell and comparators. A highly skilled local population should be better placed to contribute to, and take advantage of, newly emerging knowledge-intensive sectors.
- 5.11 The unit of measurement is NVQ 1-4 and equivalent. For reference, NVQ 2 is equal to five passes at GCSE and NVQ 4 to an undergraduate degree. The data has again been averaged over a three year period to allow for small samples sizes at district level.

Table 5-4: Skills Level (NVQ) – Working Age Population – 2006-2009 (average)

Area	% with no qualifications - working age	% with NVQ1+ - working age	% with NVQ2+ - working age	% with NVQ3+ - working age	% with NVQ4+ - working age
England	12.8	78.1	64.1	48.2	28.7
South East	9.6	82.5	68.2	51.9	31.4
Oxfordshire	7.2	83.2	69.9	56.3	34.6
Cherwell	9.4	81.9	65.5	50.6	29.9
Aylesbury Vale	9.8	84.6	67.3	50.0	31.9
Basingstoke and Deane	10.1	82.0	67.4	49.4	29.9
Huntingdonshire	8.3	84.5	68.8	51.7	31.9
Mid Bedfordshire	6.8	86.9	69.5	54.4	30.0
South Oxfordshire	8.0	84.8	70.4	55.0	33.4
West Oxfordshire	5.1	87.0	73.0	56.2	27.7

Source: Annual Population Survey 2006-2009

Figure 5-3: Proportion of the working age population with no qualification, and high level qualifications – 2006-2009 (averaged)



Source: Annual Population Survey 2006-2009

Training provision and the absence of specific forms of training provision

5.12 Oxford and Cherwell Valley College (OCVC) is the main provider of further education in Bicester, with campuses in Oxford, Banbury, Blackbird Leys and Bicester. OCVC was formed from the merger of Oxford College, North Oxfordshire College and Rycotewood College in 2003. The Bicester campus on Telford Road was opened in 2005. The college offers a relatively wide range of provision, including;

- 125 full time courses
- 1000 part time vocational programmes
- Higher Education courses in Art, Design & Furniture and other vocational areas
- community education courses and summer schools
- access courses
- business courses for private sector employers.²⁰

²⁰ <http://www.ocvc.ac.uk/>

- 5.13 However, according to the college's prospectus for 2011-12, only a handful of full time courses offered are available on the college's Bicester campus. These include;
- Advanced Apprenticeship in Motorsport
 - Advanced Apprenticeship in Motor Vehicle
 - Certificate in Sustainable energy
 - Certificate/Diploma in Access to Building Services Engineering
 - Diplomas in Motorsport Engineering (and extended diploma, sub-diploma)
 - Foundation Degree in Motorsports
 - Extended Diploma Public Services.²¹
- 5.14 It is clear from this list of provision that OCVC's Bicester campus specialises largely in motorsports, with some provision also in sustainable energy and building services. The former reflects the local importance of motorsport. The presence of some energy and building services training might serve as a good base upon which to build provision to serve the development and growth of Environmental Goods and Services (EGS) employment in Bicester.
- 5.15 It is worth noting that Bicester's identified employment strengths (in retail, wholesale and manufacturing for example), do not appear to be well-served by OCVC's Bicester campus.
- 5.16 Bicester's 11-19 year-old learners are also served by Bicester Community College (north, west and town catchment) and The Cooper School (south and east catchment). Both schools offer a standard range 16+ provision including BTECs and A/AS Levels.

²¹ Oxford and Cherwell Valley College: Full Time Prospectus. 2011-12

6: Social inclusion and social infrastructure

6.1 This chapter presents the evidence relating to social inclusion and social infrastructure. It draws on Job Centre Plus and Department for Work and Pensions (DWP) administrative data, as well secondary data from the 2007 Index of Multiple Deprivation and the 2009 Annual Survey of Hours and Earnings (ASHE). Through this data it is possible to analyse unemployment rates, levels of deprivation, and average earnings and the incidence of low incomes. The chapter ends with a summary of the Audit of Social Infrastructure Provision conducted by Hunt Dobson Stringer in October 2010.

6.2 Through the analysis, it is possible to identify the following key findings:

- the **unemployment rate in Cherwell is close to the county average but well below the national rate**
- the **rate of benefits claimants is above the county average but well below national average**. This picture is not uniform across Bicester. **Within Bicester, unemployment and benefit claims are highest in Bicester Town, East and West wards. They are lower in the North and South wards**. Unsurprisingly, eligibility for free school meals mirrors this pattern
- there is a difference between **earning of Bicester residents and those who work in Bicester**. Gross weekly pay per worker is much less than per resident, suggesting that **Bicester residents commute out to higher paid jobs, and in-commuters to Bicester work in relatively lower paid jobs**. Earnings are highest among residents in North and South wards. They are lower in the West and East wards, and Lowest in Town ward
- **Bicester's Lower Super Output Areas (LSOAs) generally fall within the least deprived in the country**. Using the Indices of Multiple Deprivation overall rankings, none of Bicester's LSOAs fall within the 20 percent most deprived in the country. In contrast, 16 (of 23) are in the least deprived 20 percent.

Unemployment rates – concentrations and groups

6.3 A number of different measures exist to measure levels of unemployment in distinct areas. The two most widely used in the UK are the wider International Labour Organisation (ILO) and the claimant count unemployment rate. The latter has been used here as a measure of job-seekers actively seeking work (claiming Job Seekers Allowance) as reported by Job Centre Plus. Given seasonal variation, the claimant count unemployment rate (proportion of working age population) has been averaged across 2009-2010.

6.4 Other relevant measures include a wider list of different benefits, drawing on data provided by the Department for Work and Pensions (DWP). Two broad measures have been referenced here; those claiming 'any benefits' and those claiming 'any out of work benefits'. The latter of these is a useful proxy for 'worklessness'.

District – level unemployment rates

Table 6-1: Unemployment – Jobseekers Allowance Claimants (09-10 average)

	Claimants	Rate (% of working age population)
England	1,276,055	3.80 %
South East	147,672	2.73 %
Oxfordshire	8,215	1.98 %
Cherwell	1,843	2.03 %
Aylesbury Vale	2,172	1.93 %
Basingstoke and Deane	2,717	2.53 %
Huntingdonshire	2,672	2.50 %
Mid Bedfordshire	1,939	2.20 %
South Oxfordshire	1,411	1.73 %
West Oxfordshire	923	1.43 %

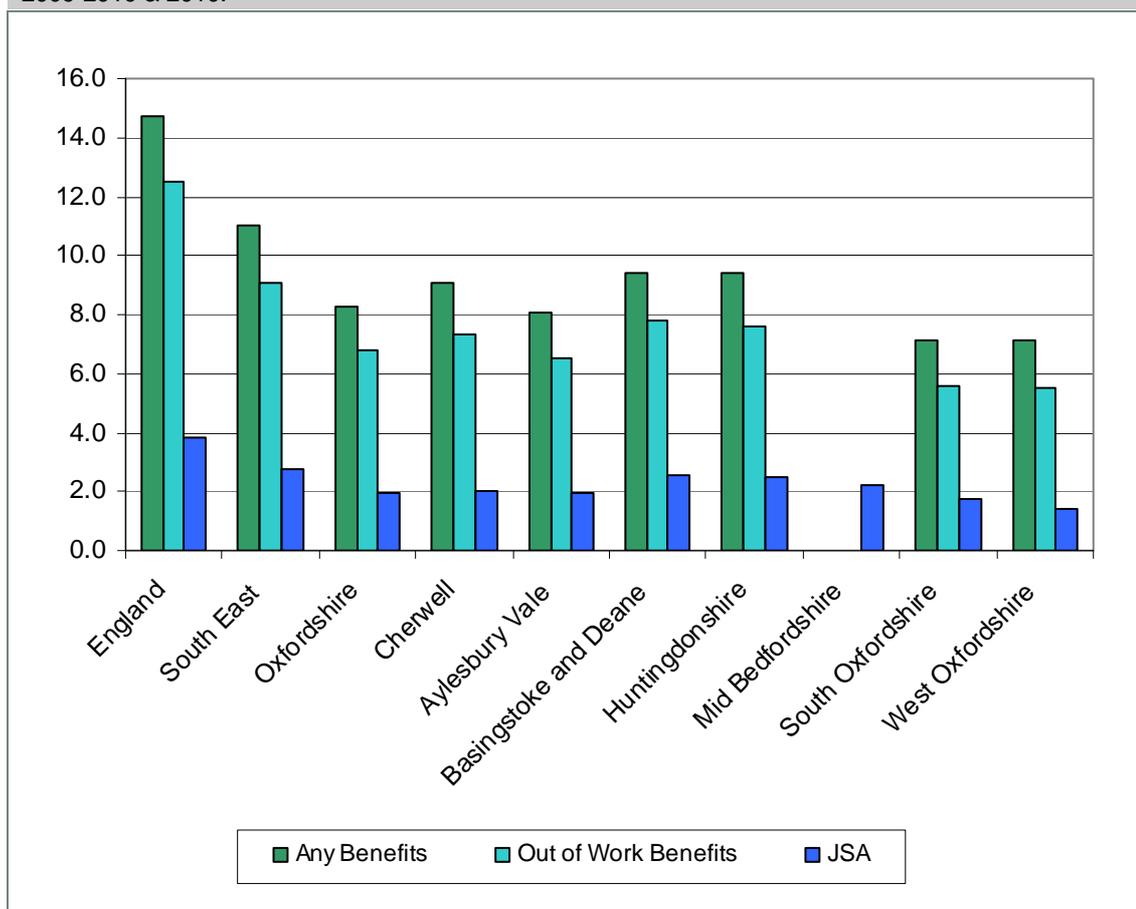
Source: Jobcentre Plus - Claimant Count with Rates and Proportions. 2010

Table 6-2: Unemployment and Worklessness – Claimants claiming any DWP benefits, and claiming 'out of work benefits' – 2010

Area	Any Benefits		Out of Work Benefits	
	number	Rate (working age population)	number	Rate (working age population)
England	4,951,230	14.7 %	4,203,450	12.5 %
South East	595,260	11.0 %	493,680	9.1 %
Oxfordshire	34,860	8.3 %	28,470	6.8 %
Cherwell	8,240	9.1 %	6,650	7.3 %
Aylesbury Vale	9,130	8.1 %	7,280	6.5 %
Basingstoke and Deane	10,140	9.4 %	8,370	7.8 %
Huntingdonshire	10,140	9.4 %	8,160	7.6 %
Mid Bedfordshire	-	-	-	-
South Oxfordshire	5,840	7.1 %	4,620	5.6 %
West Oxfordshire	4,530	7.1 %	3,520	5.5 %

Source: DWP Benefit Claimants – working age client group. 2010

Figure 6-1: DWP Claimants – ‘Any Benefit’, DWP Claimants - ‘Out of Work’ benefits & JSA Claimants – 2009-2010 & 2010.



Source: Jobcentre Plus - Claimant Count with Rates and Proportions, 2010. DWP Benefit Claimants – working age client group, 2010

Bicester-level unemployment rates

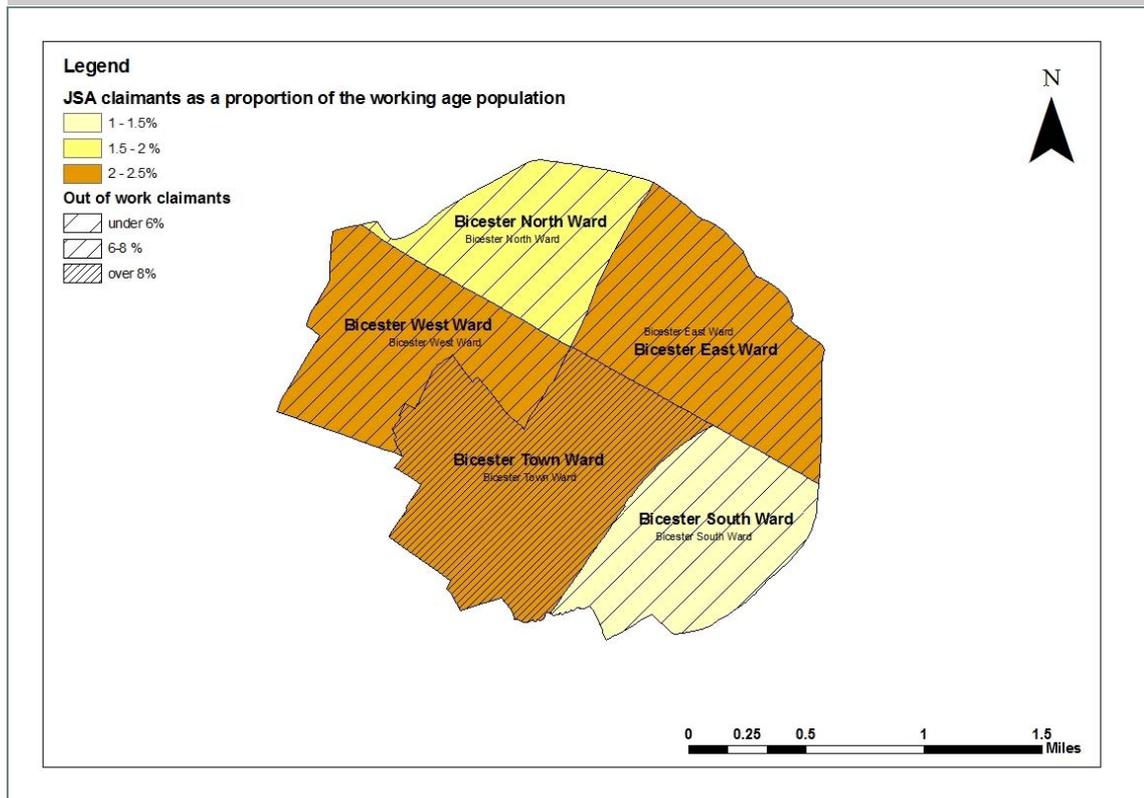
6.5 Both DWP and JCP data on unemployment and benefit claimants is available and robust at ward level, because it is based on administrative records, rather than sample-based surveys. It is therefore possible to look at unemployment ‘hotspots’. The figures for Job Seekers Allowance have been averaged to allow for seasonal variation.

Table 6-3: Unemployment – Percentage working age population claiming JSA and DWP ‘out of work benefits’ - 2009 - 2010 & 2010.

	JSA (09-10 average)	DWP ‘out of work benefits’ (2010)
Bicester East	2.2 %	7.5 %
Bicester North	1.6 %	4.9 %
Bicester South	1.3 %	4.6 %
Bicester Town	2.2 %	8.8 %
Bicester West	2.0 %	6.8 %

Source: Jobcentre Plus - Claimant Count with Rates and Proportions, 2010. DWP Benefit Claimants – working age client group, 2010

Figure 6-2: Unemployment – Percentage working age population claiming JSA and DWP ‘out of work benefits’ - 2009 - 2010 & 2010.



Source: Jobcentre Plus - Claimant Count with Rates and Proportions. 2010. DWP Benefit Claimants – working age client group. 2010. Produced by SQW Consulting 2010; © Ordnance Survey. Crown Copyright. License number 100019086

Social exclusion indicators – Index of Multiple Deprivation domains, 2007

- 6.6 The index of Multiple Deprivation (IMD) 2007 brings together indicators from a wide range of ‘domains’ including income, employment, health and crime. The analysis in Table 6-4 and Figure 6-3 is at Lower Super Output Area (LSOA) level and helps to pinpoint pockets of relative deprivation.

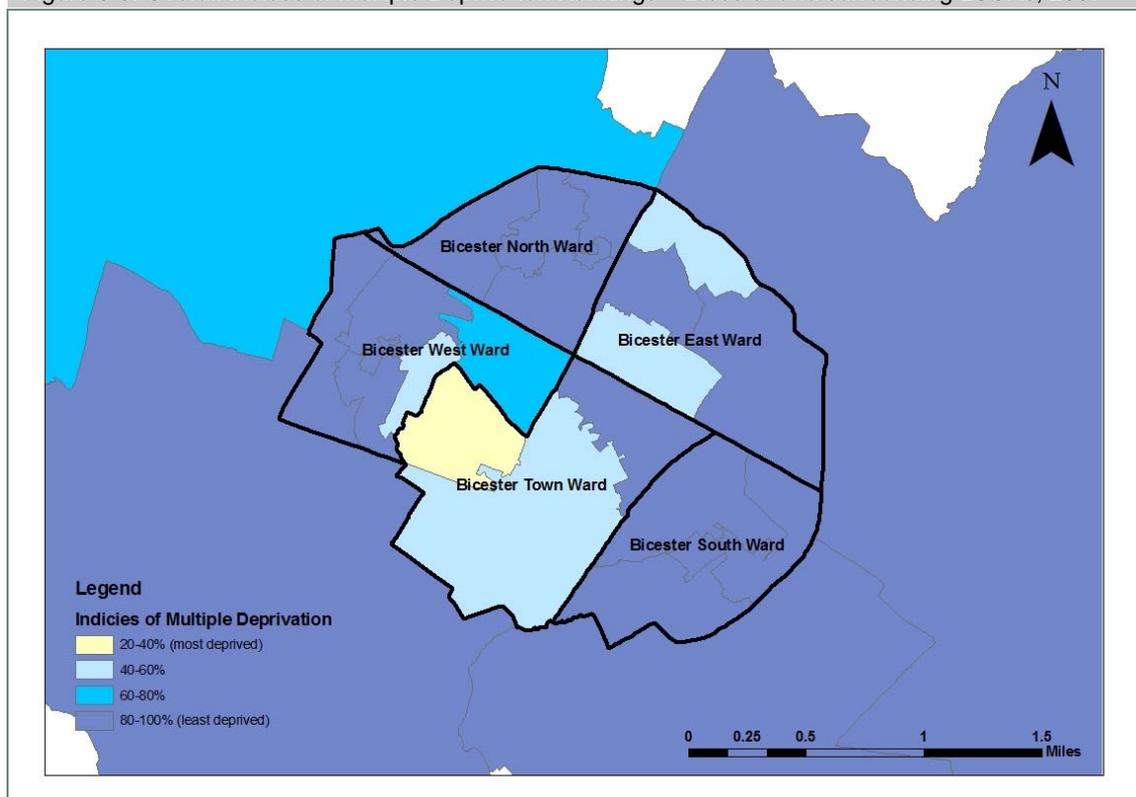
Table 6-4: Deprivation Rankings – Bicester and surrounding LSOAs - 2007

Domain	National Rankings				
	LSOAs in the most deprived 20 %	LSOAs 20% - 40%	LSOAs 40% - 60%	LSOAs 60% - 80%	LSOAs in the least deprived 20%
(Total SOAs – 23)					
	Most Deprived	—————→			Least Deprived
Overall ranking	0	1	4	2	16
Income	0	1	4	3	15
Employment	0	0	3	3	17
Health and Disability	0	0	4	4	15
Education, Skills and Training	3	4	6	9	1

Domain	National Rankings				
Barriers to Housing and Services	3	2	5	10	3
Living Environment	0	2	2	5	14
Crime	1	4	3	6	9

Source: Indices of Multiple Deprivation 2007

Figure 6-3: Overall Indices of Multiple Deprivation Rankings – Bicester and surrounding LSOAs, 2007



Source: Indices of Multiple Deprivation 2007. Produced by SQW Consulting 2010; © Ordnance Survey. Crown Copyright. License number 100019086

Average earnings and the incidence of low incomes

- 6.7 Table 6-5 and Figure 6-4 and Figure 6-5 show the resident and worker average weekly earnings for full time employees taken from the Annual Survey of Hours and Earnings (ASHE) in 2009 for Cherwell and its comparators.

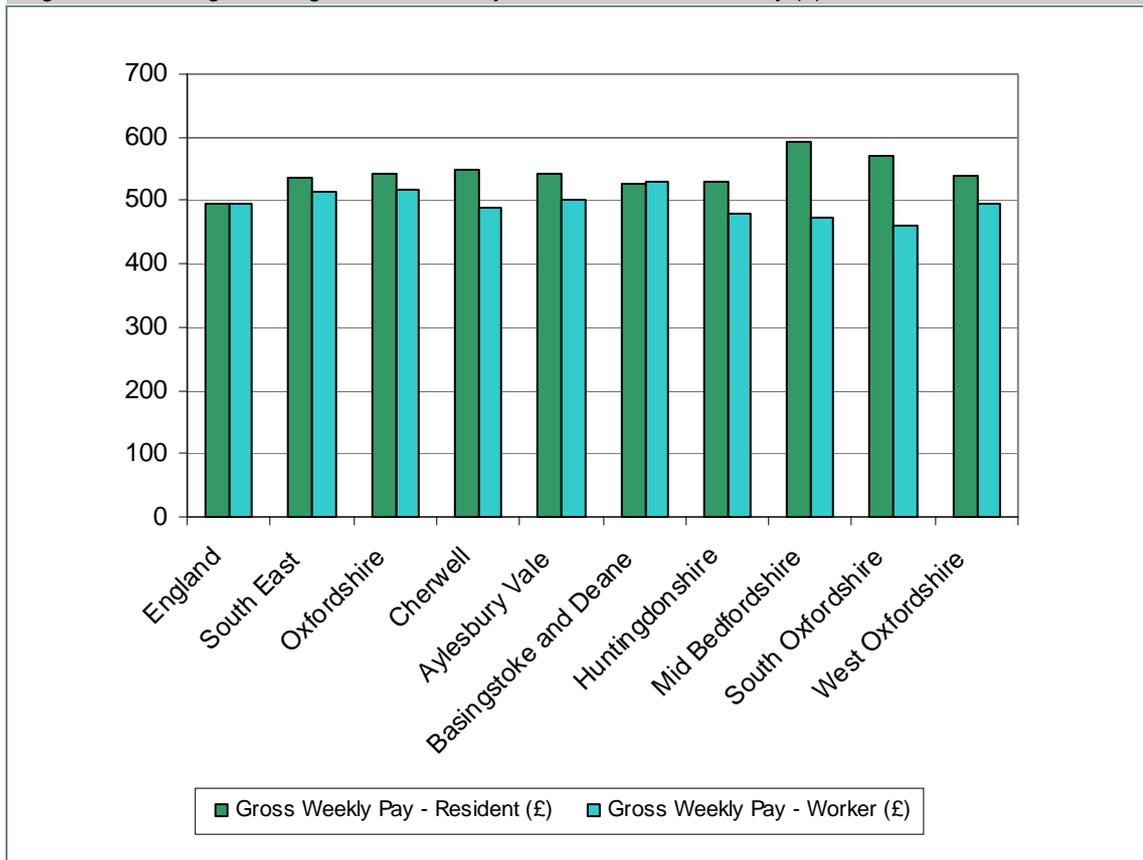
Table 6-5: Average earnings – Gross weekly Resident and Worker Pay (£) - 2009

	Gross Weekly Pay - Resident (£)	Gross Weekly Pay - Worker (£)	Difference between Resident and Worker Pay (£)
England	496.0	495.2	0.8
South East	536.6	513.6	23.0
Oxfordshire	541.4	517.5	23.9
Cherwell	549.5	490.1	59.4
Aylesbury Vale	542.1	502.2	39.9

	Gross Weekly Pay - Resident (£)	Gross Weekly Pay - Worker (£)	Difference between Resident and Worker Pay (£)
Basingstoke and Deane	527.7	530.5	-2.8
Huntingdonshire	531.0	479.1	51.9
Mid Bedfordshire	593.7	473.5	120.2
South Oxfordshire	570.2	461.4	108.8
West Oxfordshire	538.9	495.1	43.8

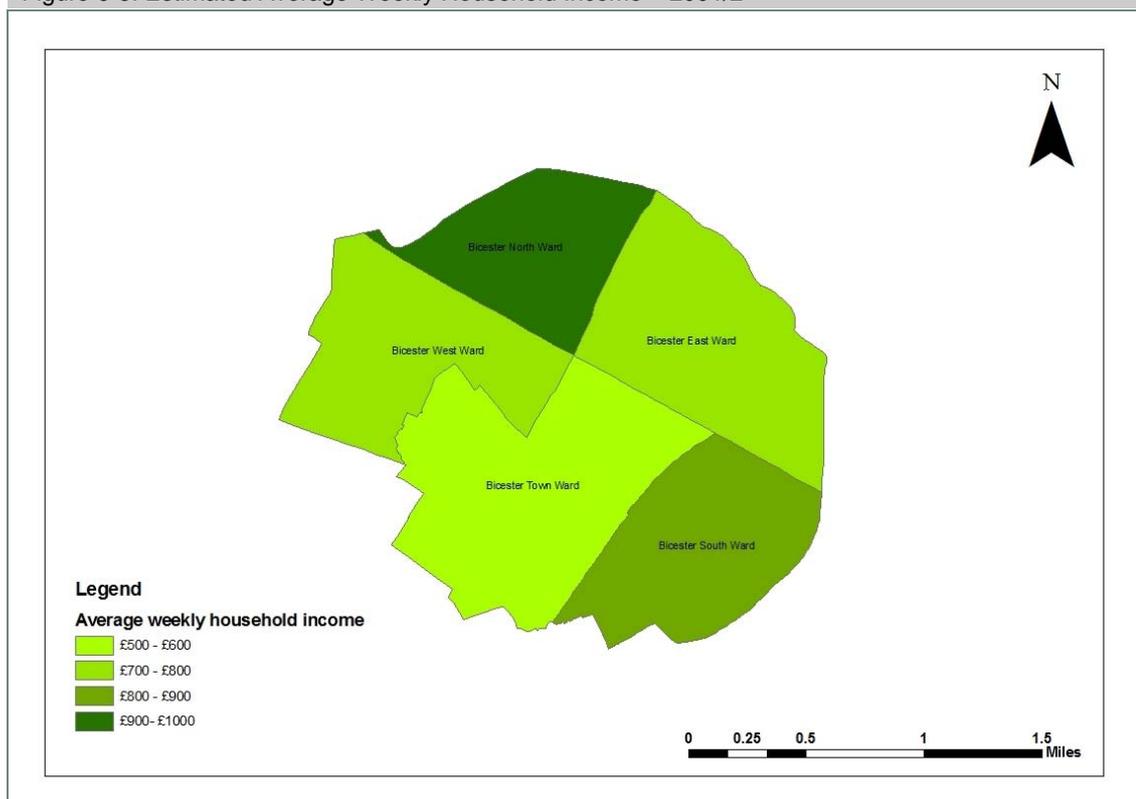
Source: Annual Survey of Hours and Earnings. 2009

Figure 6-4: Average earnings – Gross weekly Resident and Worker Pay (£) - 2009



Source: Annual Survey of Hours and Earnings. 2009

Figure 6-5: Estimated Average Weekly Household Income – 2001/2



Source: ONS – Income: Model-Based Estimates at Ward Level, 2001/2. Produced by SQW Consulting 2010; © Ordnance Survey. Crown Copyright. License number 100019086

Free School Meals

- 6.8 One additional measure of social deprivation is the proportion of Bicester’s pupils eligible for Free School Meals. This measure is useful because it highlights families where one or more parent is claiming some form of income support, pension or Child Tax Credit (implying an annual income that does not exceed £16,000). Table 6-6 sets out the proportion of pupils eligible for Free School Meals in 2010. It should be noted that this entitlement is not always taken up by all parents and carers who are eligible.

Table 6-6: Free School Meal Eligibility – 2010

	Proportion of pupils eligible for Free School Meals
Oxfordshire	9.3 %
Bicester East	10.2 %
Bicester North	6.2 %
Bicester South	6.4 %
Bicester Town	12.2 %
Bicester West	10.9 %

Source: ‘About the Bicester Area: Context & Challenges’ Oxfordshire County Council, 2010

Social Infrastructure

- 6.9 An Audit of Social Infrastructure Provision was conducted in October 2010 by Hunt Dobson Stringer.²² The report covered social infrastructure in the area surrounding the eco-town site to the north-west of Bicester. The report used a definition of ‘social infrastructure’ based on the Social Infrastructure Matrix²³ to assess the following;

Healthcare

- there are a number of GP surgeries within Bicester, the closest to the exemplar development being North Bicester surgery. Surgeries in the town are accepting new patients
- the average size list for each surgery is 1,230 patients, in line with the Oxfordshire PCT average
- dental practices, pharmacies and opticians are largely clustered in the town centre
- Bicester Community Hospital provides 12 beds, intermediate care, GP admissions, therapist outreach and an out-of-hours minor injuries unit.

Education

- Bicester has 16 primary schools, half of which have nursery classes. Those closest to the exemplar development have nursery classes. There are several day nurseries in the town centre and surrounding settlements
- the Annual Schools Census (2009) suggests that Bicester’s primary schools have a surplus capacity of 13% (534 places)
- Bicester Community College and Cooper School (secondary schools) have 420 surplus capacity places.

Leisure and recreation, open space and children’s play space

- Bicester Leisure Centre offers a swimming pool, teaching pool, crèche, sports hall, activity hall, squash courts etc
- Bicester is home to a number of sports grounds and open spaces, including some within 1.5km of the proposed site. The site is surrounded by ‘natural and semi-natural space’, including a number of footpaths.

General community facilities

- Bicester has four community centres (Bicester East, Langford Village, Southwold and West Bicester)

²² Hunt Dobson Stringer. *NW Bicester: Social Infrastructure Provision*. October 2010.

²³ Advisory Team for Larger Applications (ATLAS). *Social Infrastructure Matrix – Guidance Note*. 2009

- Bicester Library is the closest library to the site, with others in Deddington and Kidlington.

Emergency Services

- Bicester's emergency services are provided by the South Central Ambulance Service Trust, the Oxfordshire Fire and Rescue Service and Thames Valley Police respectively
- Bicester has a fire station and a police station. The closest ambulance station is some 12km to the North at Brackley.

7: Welfare and Community

- 7.1 This chapter presents the evidence relating to welfare and the community. It looks first at the life expectancy of the population using Office for National Statistics (ONS) Data. Then it looks at various characteristics of the housing stock using Communities and Local Government (CLG) data including tenure type, average price and affordability. Finally it uses the British Crime Survey (BCS) to assess the level of crime.
- 7.2 Through the analysis, it is possible to identify the following key findings:
- **life expectancy in Bicester is lower than all the comparator areas except the England average for males, but higher than all the comparator areas for females**
 - **Cherwell has a high proportion of private housing and very low proportion in council ownership, most of the social housing being owned by housing associations**
 - by Oxfordshire and South East standards, **house prices are relatively low in Cherwell at an average of £247,000 in 2010. Houses in Cherwell are also relatively affordable compared with other districts in Oxfordshire and with the South East region as a whole.** However, by national standards, and in comparison with most of the comparator districts, houses in Cherwell are expensive relative to earnings
 - **the crime rate in Cherwell is below the county and regional average, but above those for the other Oxfordshire districts (except Oxford city).**

Life expectancy of the population

- 7.3 A key indicator of deprivation is life expectancy and Table 7-1 and Figure 7-1 provide an overview for 2006 to 2008 for Cherwell and its comparators.

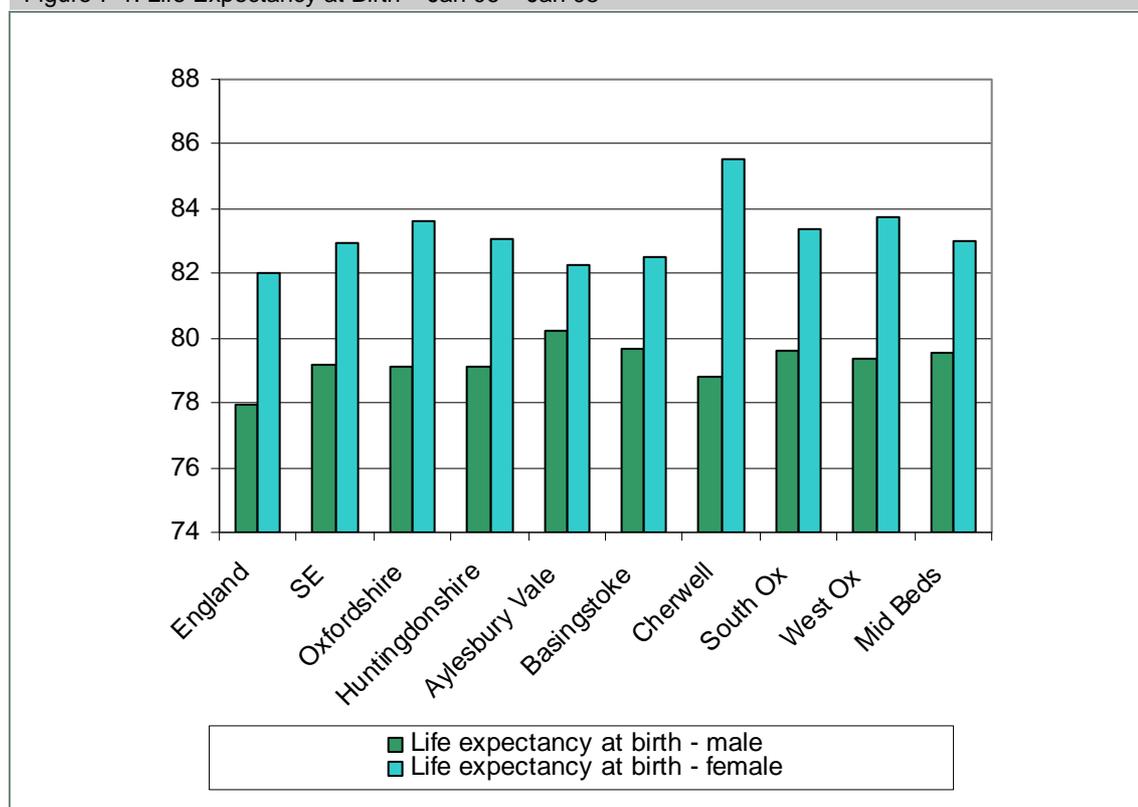
Table 7-1: Life Expectancy at Birth – Jan 06 – Jan 08

	Life expectancy at birth - male	Life expectancy at birth - female
England	77.93	82.02
SE	79.19	82.95
Oxfordshire	79.12	83.61
Huntingdonshire	79.11	83.04
Aylesbury Vale	80.2	82.28
Basingstoke	79.67	82.54
Cherwell	78.82	85.53
South Oxfordshire	79.6	83.39

	Life expectancy at birth - male	Life expectancy at birth - female
West Oxfordshire	79.37	83.73
Mid Beds	79.53	82.99

Source: ONS 'Life Expectancy at Birth 2006-2008'.²⁴

Figure 7-1: Life Expectancy at Birth – Jan 06 – Jan 08



Source: ONS 'Life Expectancy at Birth 2006-2008'

Characteristics of the housing stock

7.4 The following tables and figures use CLG data to examine the nature of the housing stock (Table 7-2 and Table 7-2); the mean house price (Table 7-3 and Figure 7-3); and the housing affordability ratio – the ratio of median house price to median earnings (Table 7-4) – and how this has changed over time (Figure 7-4). This data is provided for Cherwell and its comparators.

Table 7-2: Dwelling Stock: Number of Dwellings by Tenure – 2008/9

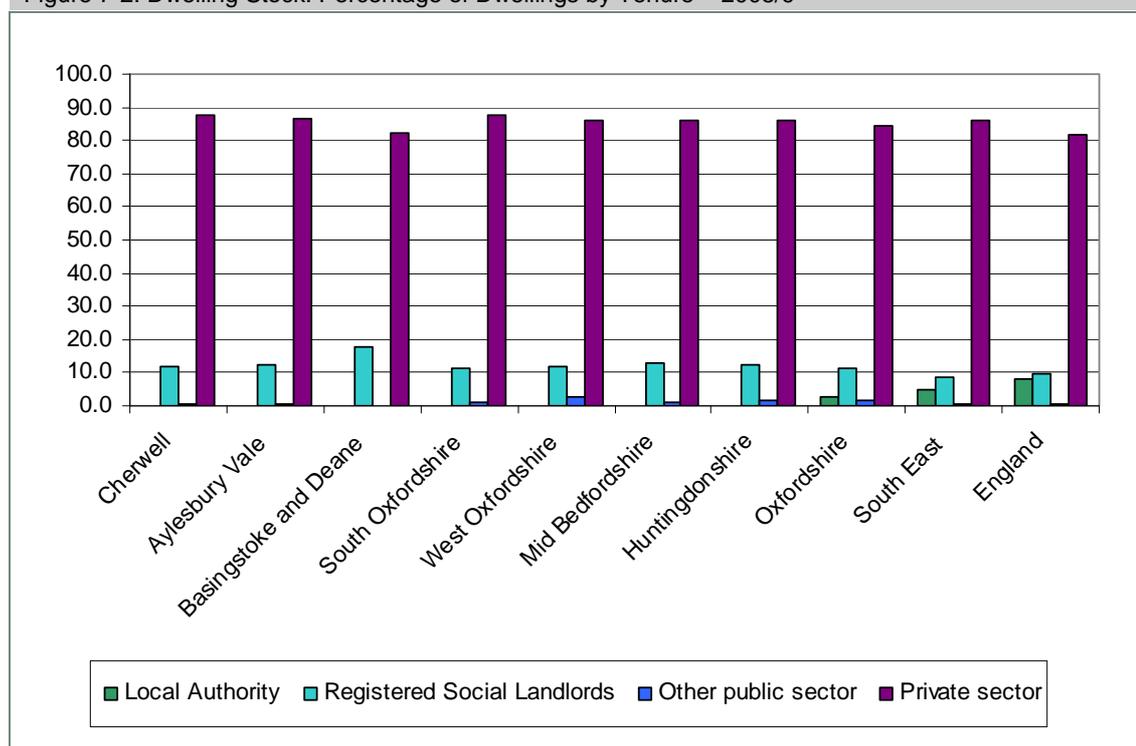
Area	Local Authority (incl. owned by other LAs)	Registered Social Landlords	Other public sector	Private sector	Total
England	1,819,696	2,195,195	73,698	18,475,654	22,564,243
South East	182,081	305,224	21,989	3,129,358	3,638,652
Oxfordshire	7,907	29,890	4,534	226,472	268,803
Cherwell	134	6,929	394	52,150	59,607

²⁴ The dataset on life expectancy is due to be revised shortly by ONS

Area	Local Authority (incl. owned by other LAs)	Registered Social Landlords	Other public sector	Private sector	Total
Aylesbury Vale	-	9,051	520	62,272	71,843
Basingstoke and Deane	-	12,319	125	57,680	70,124
South Oxfordshire	-	6,305	731	48,926	55,962
West Oxfordshire	-	5,256	1,170	38,756	45,182
Mid Bedfordshire	-	7,239	660	47,741	55,640
Huntingdonshire	-	8,815	947	60,431	70,193

Source: CLG Live Statistics

Figure 7-2: Dwelling Stock: Percentage of Dwellings by Tenure – 2008/9



Source: CLG Live Statistics

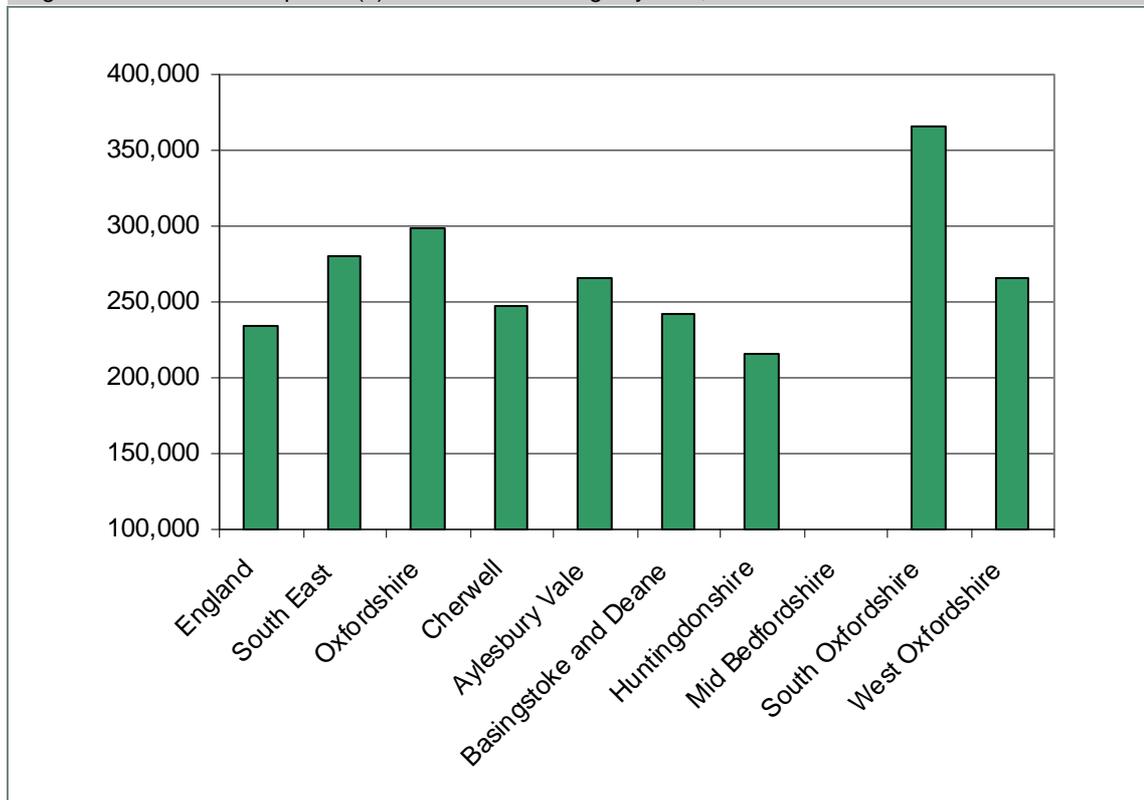
Table 7-3: Mean house prices based on Land Registry data, 2010.

Area	Mean House Price (Q2 2010)
England	£234,525
South East	£279,629
Oxfordshire	£298,731
Cherwell	£246,935
Aylesbury Vale	£265,696
Basingstoke and Deane	£242,544
Huntingdonshire	£215,568
Mid Bedfordshire	-

Area	Mean House Price (Q2 2010)
South Oxfordshire	£365,152
West Oxfordshire	£265,768

Source: CLG Live Statistics

Figure 7-3: Mean house prices (£) based on Land Registry data, 2010.



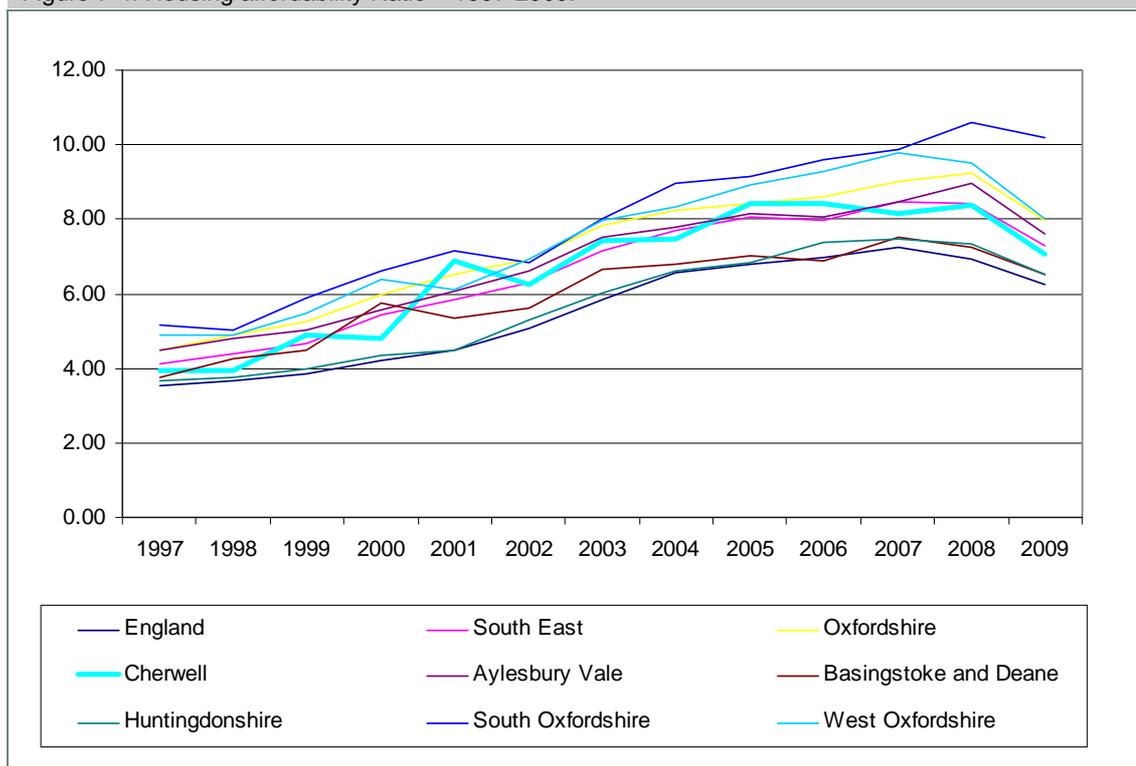
Source: CLG Live Statistics

Table 7-4: Housing Affordability Ratio: ratio of median house price to median earnings - 2009

Area	Affordability Ratio
England	6.27
South East	7.28
Oxfordshire	7.96
Cherwell	7.06
Aylesbury Vale	7.63
Basingstoke and Deane	6.50
Huntingdonshire	6.50
Mid Bedfordshire	-
South Oxfordshire	10.18
West Oxfordshire	8.03

Source: CLG Live Statistics 2009

Figure 7-4: Housing affordability Ratio – 1997-2009.



Source: CLG Live Statistics 1997-2009

Levels of recorded crime

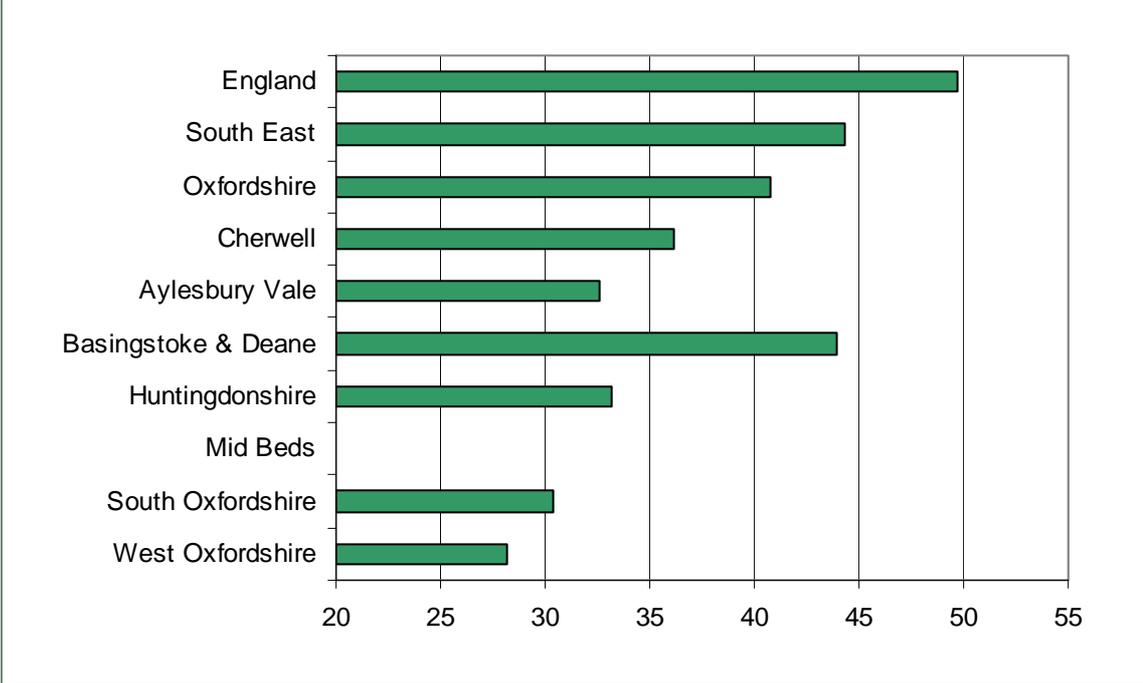
7.5 The headline figures for crime are provided in Table 7-5 and Figure 7-5. The data is derived from recorded crime identified through the British Crime Survey (BCS) comparator data.

Table 7-5: Overall recorded crime rate (BCS Comparator) – 2008/9

Area	Overall Crime Rate
England	49.7
South East	44.3
Oxfordshire	40.8
Cherwell	36.2
Aylesbury Vale	32.6
Basingstoke & Deane	43.9
Huntingdonshire	33.2
Mid Beds	-
South Oxfordshire	30.4
West Oxfordshire	28.2

Source: Floor Targets Statistics - DCLG

Figure 7-5: Overall recorded crime rate – 2008/9



Source: Floor Targets Statistics - DCLG

8: Cherwell District Council's Economic Development Strategy

- 8.1 In November 2010 Cherwell District Council published the consultation draft of its Economic Development Strategy for 2011-2016. This chapter provides a brief summative overview of the Cherwell District Council Economic Development Strategy for 2011-2016. It is included here because it is important that any wider strategy for North West Bicester fits with the issues it identifies, the ambitions it sets out and the wider plans for Bicester as a whole.
- 8.2 The strategy identifies 16 issues that currently face the district – many of which are as true for Bicester as they are for Cherwell as a whole. These issues include:
- levels of **employment** remain high but not everybody is benefiting
 - we have increasingly relied upon **public sector** jobs which are set to reduce in number
 - **the economic climate, access to finance and cash flow** have become critical issues for businesses
 - **wages** paid within Cherwell still lag behind South East regional averages
 - there are still residents without the right **skills**
 - there remain pockets of **deprivation** within our overall prosperity
 - our **population** is expected to grow significantly
 - employment **land, premises & services** do not always meet modern business needs
 - we have a **diverse** economy but often with 'lower value' activity similar to the south Midlands
 - **manufacturing** is a particular strength but is often lower skilled locally
 - the **knowledge** economy is growing but not quickly enough
 - businesses are highly **satisfied** with their location in Cherwell yet all too often still face real issues and constraints
 - this is an **enterprising** district with potential for innovation
 - the **environment** provides both challenges and opportunities in creating a low carbon economy, especially through the 'Eco Bicester' project
 - **globalisation** has also become a significant issue for the economy: both a challenge and opportunity
 - the **community** sector will have an increasing role to play.

8.3 The strategy has four over-arching ambitions:

- opportunities for all
- a diverse and resilient economy
- connected infrastructure and protected environment
- resourceful and receptive community leadership.

8.4 Ambitions that will be delivered through the four themes of:

- developing resilience – which includes ensuring a diverse and resilient economy remains at the heart of Cherwell’s Vision; building a strong and flexible partnership culture; and maximising the ‘green economy’ benefits arising from Eco-Bicester
- developing people – includes creating employment; providing access to employment; enhancing skills; and engaging the community in economic development
- developing business – includes promoting business start-up and entrepreneurship; developing local procurement and supply chains; promoting business and cluster development; attracting new investment; developing a ‘world class’ business community; and developing the visitor economy
- developing place – includes promoting employment sites and premises; managing infrastructure development; and supporting rural areas and urban centres.

8.5 In seeking to address these issues and to deliver its ambitions the strategy looks at the District’s three main urban centres as well as the wider rural areas. Bicester is one of these centres. In discussing Bicester, the strategy explicitly identifies the important role and unique opportunity presented by the eco-town not just to create new homes and employment opportunities but to act as a catalyst for inward investment and repositioning of the local economy.

8.6 More broadly the strategy notes that the ease of access from Bicester to Oxford, Aylesbury and London has made it a popular residential area, but created significant issues of transport pressures and a ‘brain drain’. As a result, the strategy notes that Bicester must become a more attractive work location for many of its more-qualified and higher-earning residents. The expectation is that Bicester will become a significant location in the Oxford-Cambridge Arc, and so see an increase in science and technology based businesses, exploiting innovations and spin-outs from academic research. The strategy notes that in doing this, Bicester will be able to take advantage of both materials engineering and biotechnology in its economic future because of its geographic location and the strength of those sectors already nearby. In addition, the strategy notes that as these sectors become more established the breadth of the towns’ knowledge economy will increase to encompass other areas of innovation and creativity such as motorsport engineering. Finally the strategy notes the continued importance of the Bicester Village retail development and the need to ensure that the town centre is able to co-exist with the retail village in a mutually productive way. To achieve this it is expected that Bicester will show an increase in specialist high-value retailers appealing to

discerning but affluent customers alongside its good range of local services in a revitalised town centre with enhanced rail services.

8.7 In order to achieve this, the strategy commits Cherwell District Council to:

- maximise the potential of the eco-town development – build upon the accessibility of Bicester, its skilled workforce, further education opportunities, and location to attract new businesses – as detailed separately in the eco-Bicester Economic Development Strategy
- improve the quality of business premises and access to utilities
- work with Bicester Village to raise the international profile of the town
- complete the Town Centre Redevelopment Project - a comprehensive redevelopment of the Crown, Crown Walk and Franklins yard car parks to provide a supermarket, cinema, replacement car parks and bus facilities and further retail and restaurant units
- Remodel Market Square – led by Oxfordshire County Council, a highway and townscape improvement scheme.

Annex A: SIC Definitions of Growth Sectors

A.1 The following tables present the SIC definitions for the five growth sectors identified and discussed in Chapter 3.

Eco-construction and broader eco-technologies, including retrofit of the existing stock and new build in surrounding areas

Table A-1: SIC Definitions

Relevant defined sub-sectors	<p>“The Environmental Goods and Services Sector”</p> <p>“Construction of buildings and high value construction”</p>
SIC Definitions	<p>“The Environmental Goods and Services Sector”</p> <p>SIC 2003 Descriptors:</p> <ul style="list-style-type: none"> • agricultural services activities • forestry and logging • forestry and logging service activities • manufacture of electrical distribution and control appliances • recycling of metals • recycling of non metals • collection, purification and distribution of water • wholesale of waste scrap • collection and treatment of sewage • collection and treatment of other waste • sanitation and remediation. <p>“Construction of buildings and high value construction”</p> <p>SIC 2003 Descriptors:</p> <ul style="list-style-type: none"> • general construction of buildings • architectural/engineering activities and related technical consultancy.

Source: http://www.london.gov.uk/sites/default/files/current-issues-note-25_0.pdf and SQW

Auto engineering, including motorsport and electric vehicles and advanced manufacturing and other opportunities relating to the Oxfordshire high tech cluster

Table A-2: SIC Definitions

Relevant defined sub-sectors	<p>“Auto engineering and high performance engineering”</p> <p>“Knowledge intensive manufacturing”</p>
SIC Definitions	<p>“auto engineering and high performance engineering”</p> <p>SIC 2003 Descriptors:</p> <ul style="list-style-type: none"> • rubber tyres etc. • retreading • casting of steel • casting of light metals • casting of non-ferrous metals • forging , pressing, stamping

- treatment and coating
- manufacture of fasteners
- manufacture of fabricated metal products
- manufacture of machinery for production of mechanical power
- manufacture of machine tools
- manufacture of medical / surgical etc.
- manufacture of instruments for measuring etc.
- manufacture of optical instruments
- manufacture of motor vehicles
- manufacture of motor vehicle bodies
- building and repairing of ships
- manufacture of aircraft and spacecraft
- manufacture of motorcycles and bicycles
- manufacture of transport equipment
- research technical testing and analysis
- natural sciences/ engineering.

“Knowledge intensive manufacturing”

SIC 2003 Descriptors:

- manufacture of pharmaceuticals, medicinal chemicals and botanical products
- manufacture of office machinery and computers
- manufacture of electrical equipment not elsewhere classified
- manufacture of medical and surgical equipment and orthopaedic appliances
- manufacture of instruments and appliances for measuring, checking, testing, navigating and other purposes, except industrial process control equipment
- manufacture of industrial process control equipment
- manufacture of optical instruments and photographic equipment
- manufacture of aircraft and spacecraft.

Source: SQW and OECD

Logistics

Table A-3: SIC Definition

Relevant defined sub-sectors	“Logistics”
SIC Definitions	“Logistics”
	SIC 2003 Descriptors:
	<ul style="list-style-type: none"> • agents involved in the sale of agricultural raw materials, live animals, textile raw materials and semi-finished goods • agents involved in the sale of fuels, ores, metals and industrial chemicals • agents involved in the sale of timber and building materials • agents involved in the sale of machinery, industrial equipment, ships and aircraft • agents involved in the sale of furniture, household goods, hardware and ironmongery • agents involved in the sale of food, beverages and tobacco • agents specialising in the sale of particular products or ranges of products not elsewhere classified • agents involved in the sale of a variety of goods

-
- wholesale of grain, seeds and animal foods
 - wholesale of flowers and plants
 - wholesale of live animals
 - wholesale of unmanufactured tobacco
 - wholesale of fruit and vegetables
 - wholesale of meat and meat products
 - wholesale of dairy produce, eggs and edible oils and fats
 - wholesale of alcoholic and other beverages
 - wholesale of tobacco products
 - wholesale of sugar and chocolate and sugar confectionery
 - wholesale of coffee, tea, cocoa and spices
 - non-specialised wholesale of food, beverages and tobacco
 - wholesale of electrical household appliances and radio and television goods
 - wholesale of china and glassware, wallpaper and cleaning materials
 - wholesale of perfume and cosmetics
 - wholesale of pharmaceutical goods
 - wholesale of other household goods
 - wholesale of solid, liquid and gaseous fuels and related products
 - wholesale of wood, construction materials and sanitary equipment
 - wholesale of hardware, plumbing and heating equipment and supplies
 - wholesale of chemical products
 - wholesale of other intermediate products
 - wholesale of machine tools
 - wholesale of mining, construction and civil engineering machinery
 - wholesale of machinery for the textile industry, and of sewing and knitting machines
 - wholesale of computers, computer peripheral equipment and software
 - wholesale of other office machinery and equipment
 - wholesale of other electronic parts and equipment
 - wholesale of other machinery for use in industry, trade and navigation
 - other wholesale
 - freight transport by road not elsewhere classified
 - scheduled air transport
 - non-scheduled air transport
 - cargo handling
 - storage of frozen and refrigerated goods
 - other storage and warehousing not elsewhere classified
 - activities of other transport agencies
 - national post activities
 - courier activities other than national post activities.

Source: Skills for Logistics

Professional business and financial services

Relevant defined sub-sectors **“Professional business and financial services”**

SIC Definitions **“Professional business and financial services”**

SIC 2003 Descriptors:

- financial intermediation
- insurance and pensions
- activities auxiliary to financial intermediation
- real estate
- renting of machinery
- computing and related
- R&D
- legal, accounting etc.
- architectural and engineering activities
- technical testing and analysis – see note later
- advertising
- architectural and engineering activities.

Source: SQW