

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

P3Eco Ltd

a2dominion 



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Approved by:	Chris Green	Date:	November 2010
	Director		

Executive Summary

Table 1: Key findings in relation to the indicators included in the CLG/TCPA guidance on eco-towns

Indicator	Key findings
Population, demographics and labour supply (Chapter 3)	
Characteristics of the local and sub-regional population	Cherwell has a high proportion of the population in the 30-64 and 0-14 age ranges, compared with Oxfordshire as a whole and the England average.
Economic activity rates	Economic activity and employment rates are similar to Oxfordshire as a whole but above the national average.
Migration and existing commuting patterns across the sub-region	More people commute out of Bicester to work – mainly to Oxford – than commute in from elsewhere. Nevertheless, 58% of residents work within the District.
Population and labour supply forecasts	Based on 2008 projections (ie 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 4)	
Employment distribution across sectors – identifiable key sectors, including knowledge- and technology-related sectors and environment related sectors	<p>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.</p> <p>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.</p> <p>'Knowledge-intensive' businesses in Cherwell employ 8.6% of the workforce, lower than the Oxfordshire, regional and national averages, but a higher proportion than in some comparator districts.</p> <p>The environment-related sectors currently account for 1.1% of the workforce in Cherwell, higher than the Oxfordshire (and national) average, but lower than the regional average and all other comparator districts.</p>
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.
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 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 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.

Indicator	Key findings
Business performance and competitiveness (Chapter 5)	
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	<p>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”).</p> <p>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.</p>
Availability of business space and premises	<p>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.</p> <p>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.</p>
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.
Education, skills, qualifications and training (Chapter 6)	
Key Stage 2 attainment, GCSE attainment, A Level attainment	GCSE attainment levels, if core subjects (English and Maths) are included, are low compared with Oxfordshire, the region and all comparator districts – though above the national average. Attainment at A level is very low relative to comparators.
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.
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 (eg in retail, wholesale and 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 7)	
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	<p>The rate of benefits claimants is above county but well below the national average. Within Bicester, unemployment and benefit claims are highest in Bicester Town, East and West wards.</p> <p>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%</p>

Indicator	Key findings
Access to services and key forms of social infrastructure	<p>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.</p> <p>Bicester's primary schools have a surplus capacity of 13% (534 places), and the secondary schools have 420 surplus capacity places.</p> <p>Bicester Leisure Centre offers a swimming pool, teaching pool, crèche, sports hall, activity hall, squash courts etc.</p> <p>Bicester has a fire station and a police station. The closest ambulance station is some 12km to the North at Brackley.</p>
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 8)	
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 support the planning applications for the exemplar phase, and subsequently the full Masterplan, of the proposed Eco-development at NW Bicester.
- 1.2 The structure is based on the guidance provided by the Town and Country Planning Association (TCPA) in the ‘Eco-towns economy worksheet’¹.
- 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 neighbours², and nearby districts.
- 1.4 For each Chapter, we present series of tables and diagrams preceded by a summary commentary on the key points that derive from the tables.

¹ Developing Effective Economic Strategies for Eco-towns: Eco-towns Economy Worksheet, Advice to Promoters and Planners, March 2009, TCPA and CLG

² 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

Table 2-1: Key Findings – Population, demographics and labour supply

Cherwell has a high proportion of the population in the 30-64 and 0-14 age ranges, compared with Oxfordshire as a whole and the England average. The district is less ethnically diverse than England, the South East and Oxfordshire.

Economic activity and employment rates are similar to Oxfordshire as a whole but above the national average.

The 2001 Census provides the most recent comprehensive data on commuting. 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.

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. However the working age population in Cherwell is expected to increase more slowly, so that by 2031 the working age population in the district is expected to be only 2000 greater than in 2010. The increase in working age population is expected to be at a slower rate than in the South East or nationally. The relative proportion of the population in this group will decline by 7.6%.

Source: SQW

Characteristics of the local and sub-regional population

Table 2-2: Population - 2009

	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

Table 2-3: Ethnicity - 2007

	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 2-4: 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

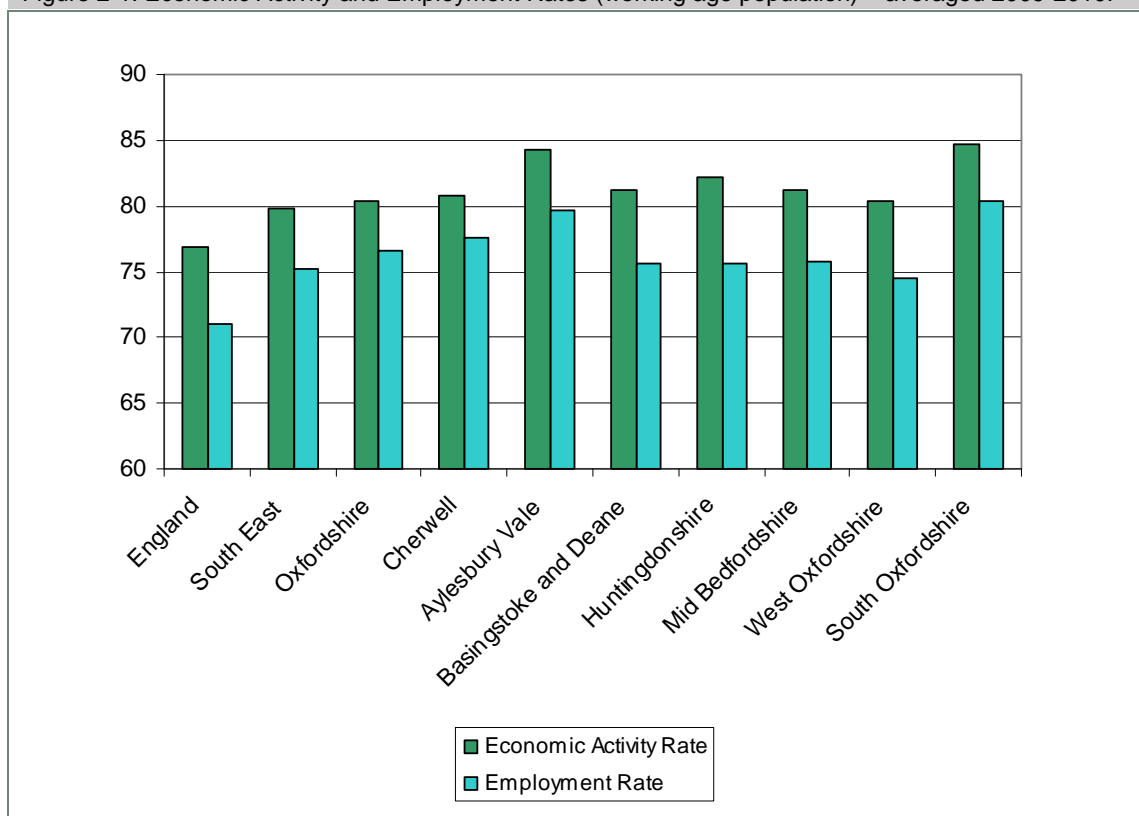
Economic activity rates

Table 2-5: 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 2-1: 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

- 2.1 Below we present the commuting figures sourced from the 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.

District commuting

In-commuting to Bicester

- 2.2 Commuting into Bicester wards

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

Area of Residence	% of Bicester's workforce
Cherwell (including Bicester and Banbury)	74.3 %
Aylesbury Vale	6.7 %
Oxford	2.9 %
West Oxfordshire	2.6 %
White Horse	2.0 %
South Oxfordshire	1.5 %
<i>Banbury (5 wards)</i>	2.7 %

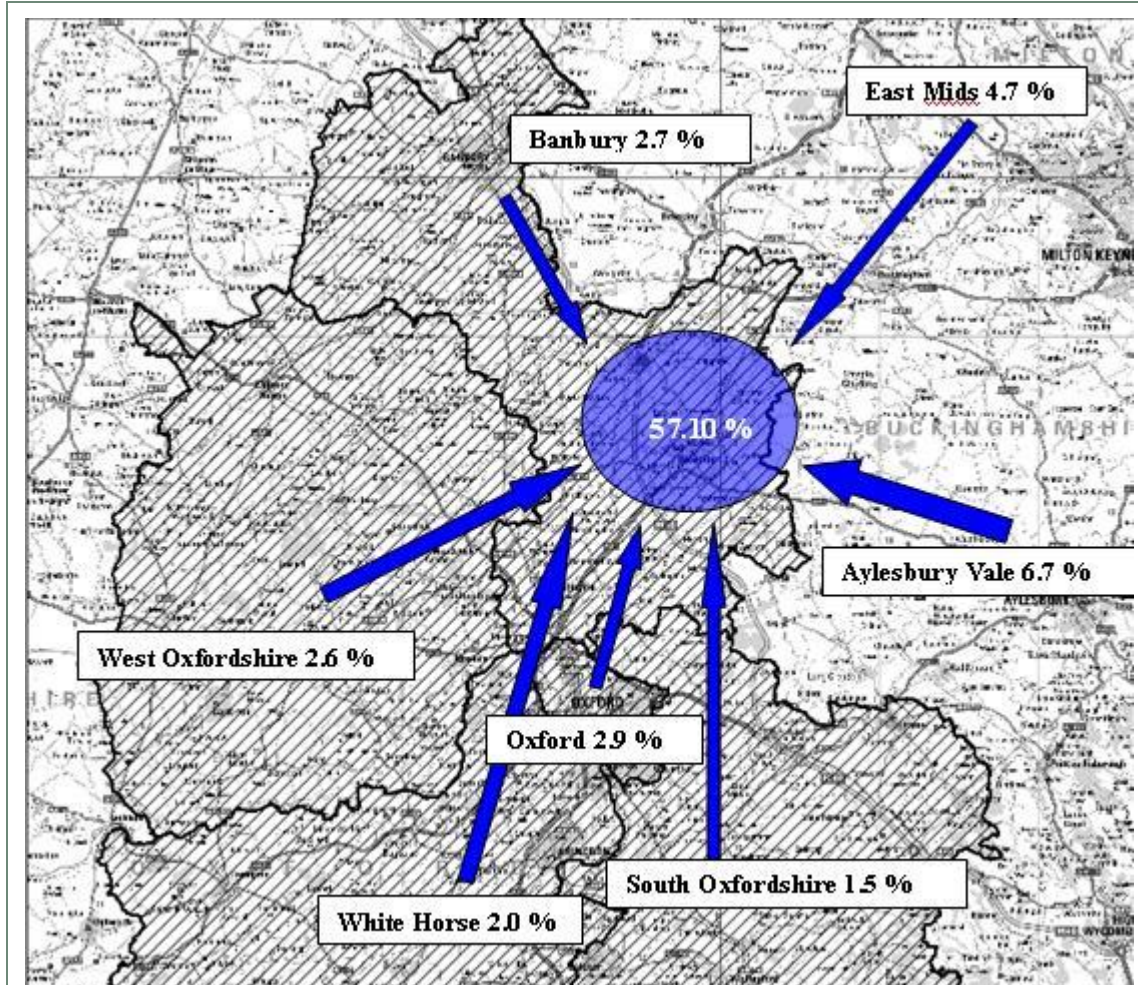
Source: Census 2001

Table 2-7: In-commuting to Bicester – Significant Origins by Region

Area of Residence	% of Bicester's workforce
South East (including Cherwell)	91.8 %
East Midlands	4.7 %
East	1.2 %
West Midlands	0.9 %
South West	0.8 %
London	0.3 %

Source: Census 2001

Figure 2-2: 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

2.3 Residents of Bicester wards, outwards

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

Area of Workplace	Percentage of working Bicester Residents
Cherwell (including Bicester and Banbury)	58.3 %
Oxford	14.6 %
Aylesbury Vale	3.6 %
White Horse	3.0 %
South Oxfordshire	3.0 %
West Oxfordshire	2.6 %
Banbury (5 wards)	2.3 %

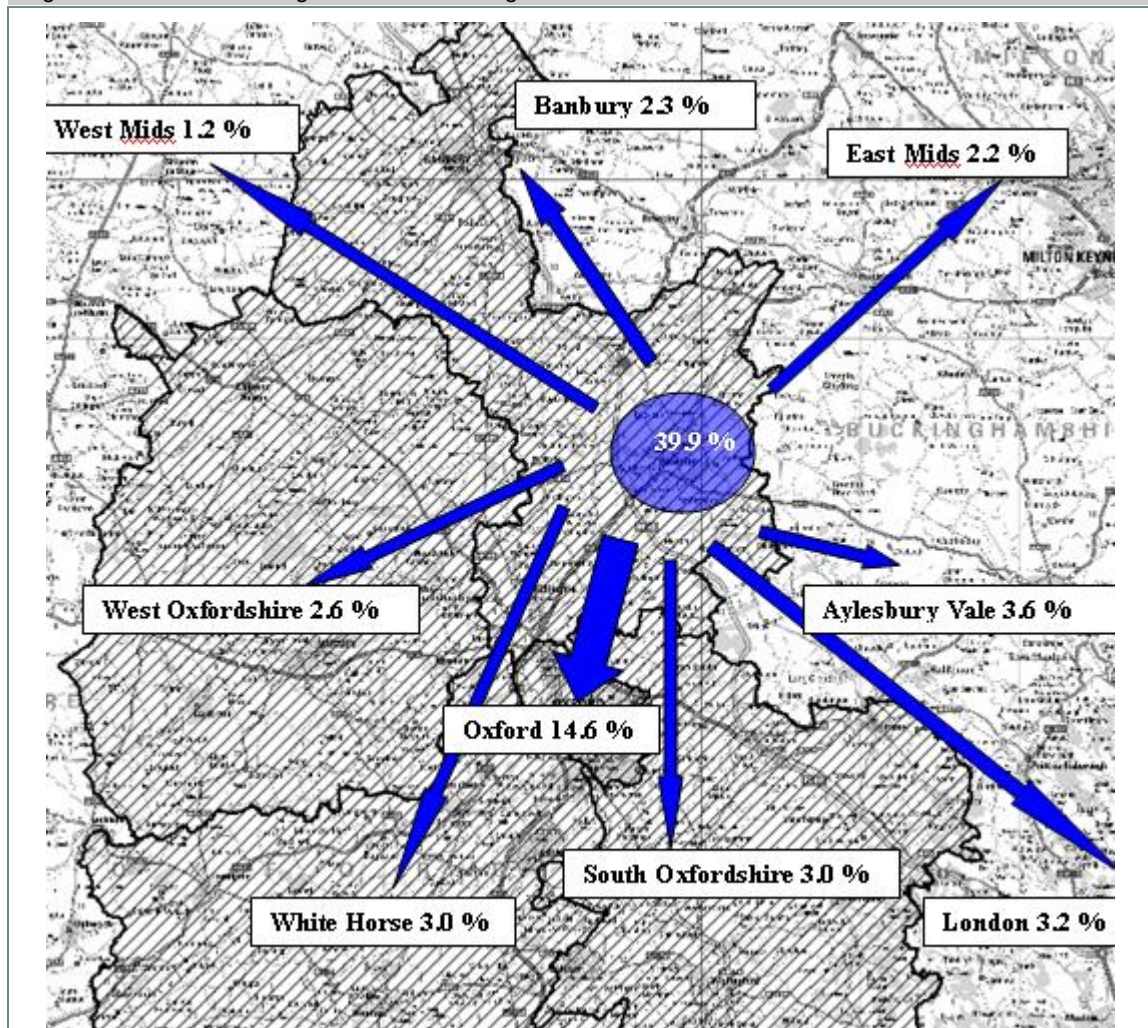
Source: Census 2001

Table 2-9: Out-commuting from Bicester – Significant Destinations by Region

Area of Workplace	Percentage of working Bicester Residents
South East (Cherwell)	91.3 %
London	3.2 %
East Midlands	2.2 %
West Midlands	1.2 %
East	1.0 %
South West	0.5 %

Source: Census 2001

Figure 2-3: Out-commuting from Bicester – Significant Destinations



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

Commuting within Cherwell

Cherwell residents commuting into Bicester

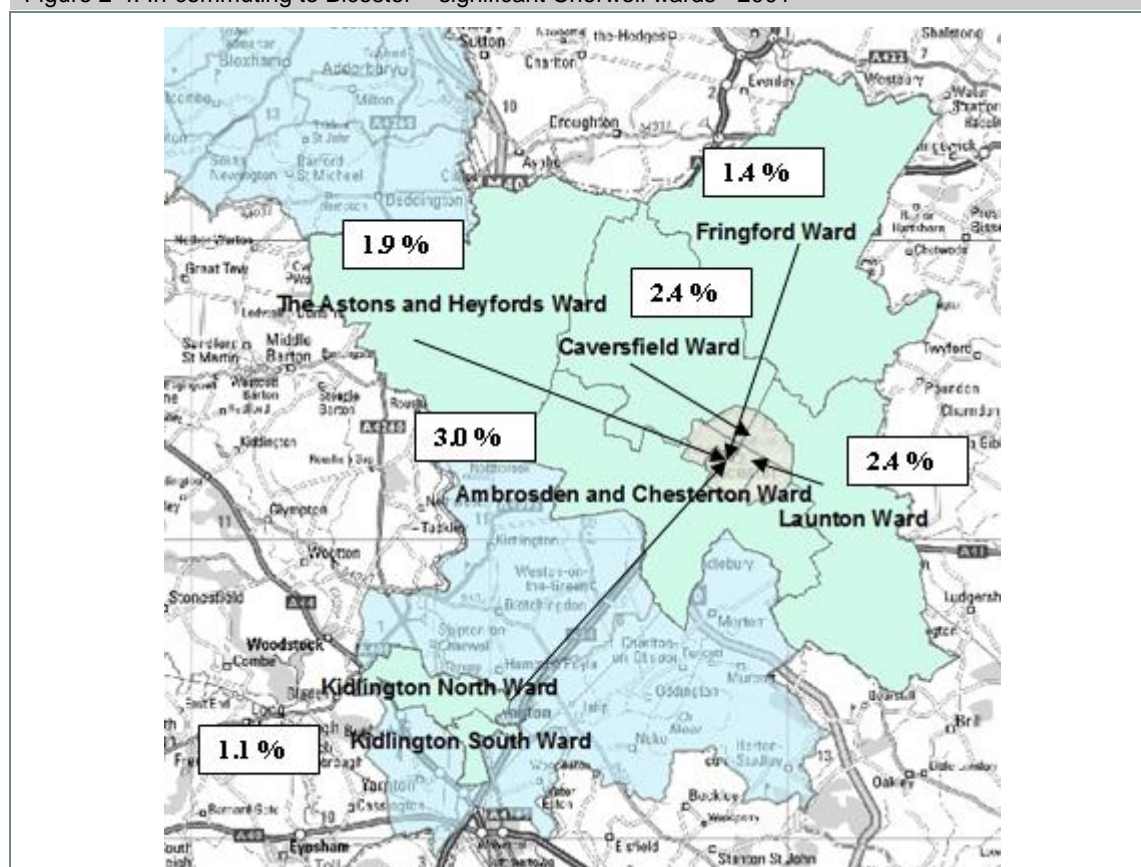
2.4 Inwards to Bicester wards (combined)

Table 2-10: In-Commuting to Bicester – Significant Cherwell Origins by Ward

Area of Residence	% of Bicester's workforce
Bicester (5 wards)	57.1 %
Launton	2.4 %
Caversfield	2.4 %
The Astons and Heyfords	1.9 %
Fringford	1.4 %
Kidlington (2 wards)	1.1 %
Banbury (5 wards)	2.7 %

Source: Census 2001

Figure 2-4: In-commuting to Bicester – significant Cherwell wards - 2001



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

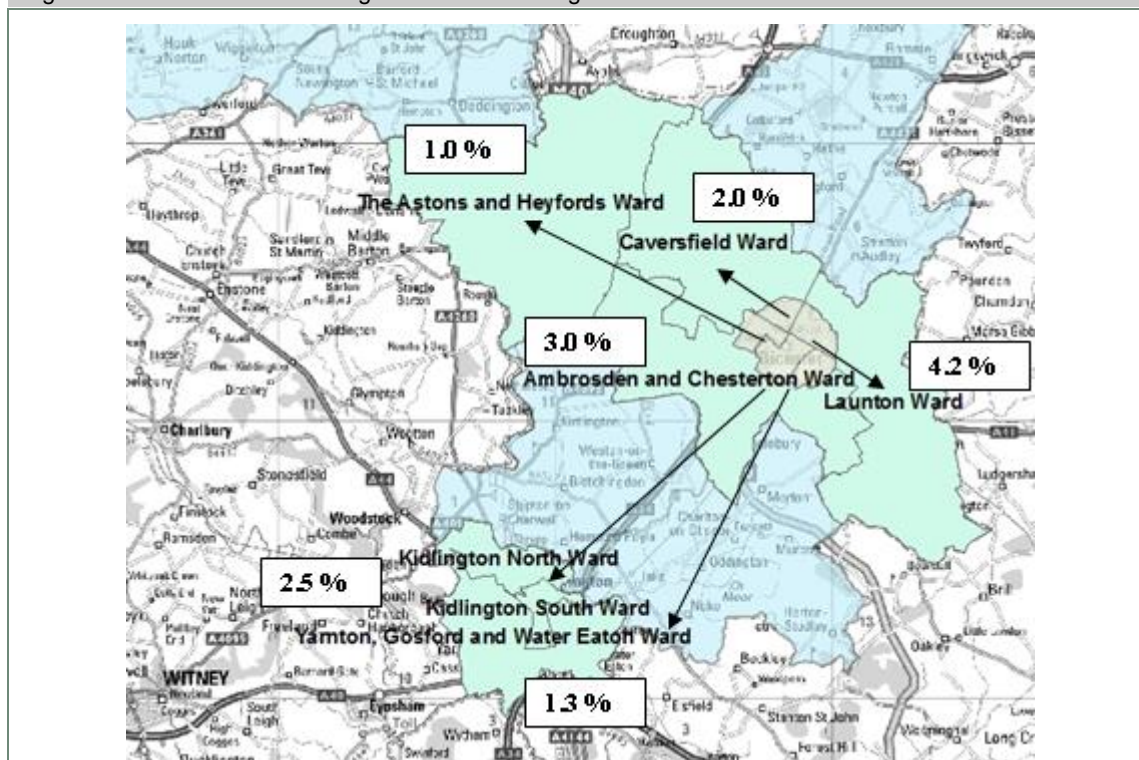
Bicester residents commuting out to Cherwell

Table 2-11: Outwards Commuting from Bicester – Significant Cherwell Destinations by Wards

Area of Workplace	Percentage of working Bicester Residents
Bicester (5 wards)	39.9 %
Launton	4.2 %
Ambroseden and Chesterton	3.0 %
Kidlington North and South (2 wards)	2.5 %
Caversfield	2.0 %
Yarnton, Gosford and Water Eaton	1.3 %
The Astons and Heyfords	1.0 %
Banbury (5 wards)	2.3 %

Source: Census 2001

Figure 2-5: Outwards commuting from Bicester – Significant Cherwell Wards



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

Population and labour supply forecasts

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
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

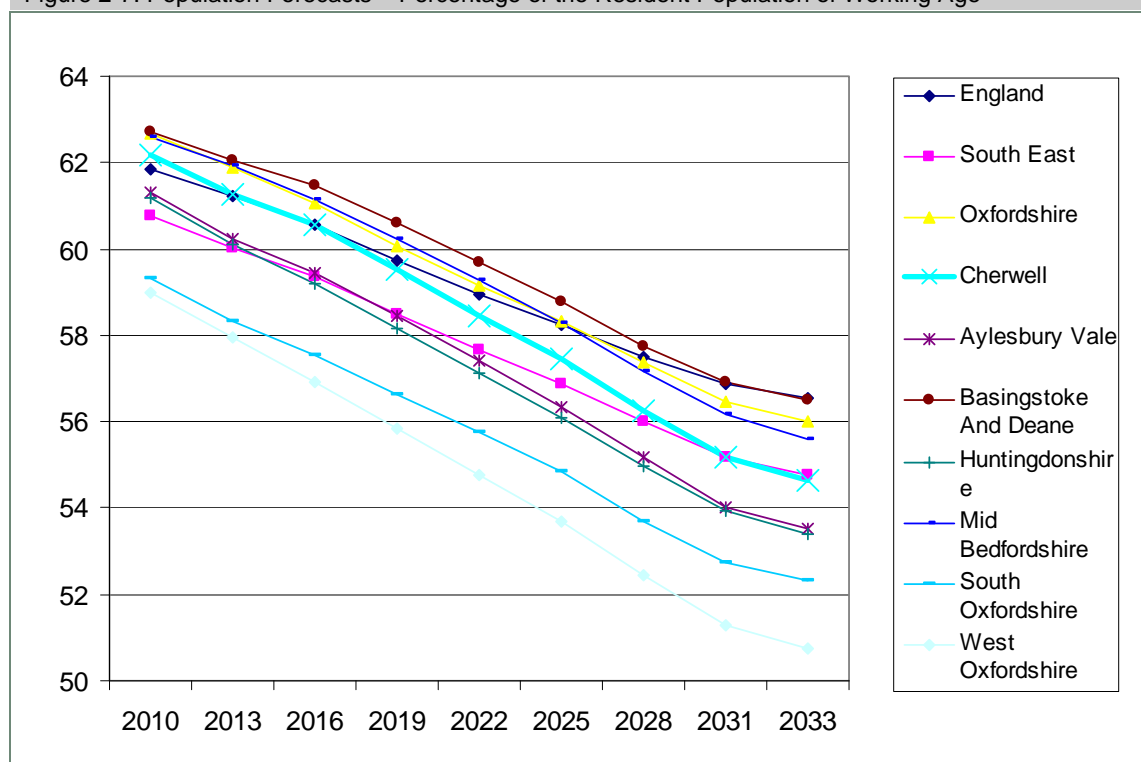
Source: 2008 sub-national population projections

Figure 2-6: 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 2-7: Population Forecasts – Percentage of the Resident Population of Working Age



Source: 2008 sub-national population projections

3: Employment and labour demand

Table 3-1: Key Findings – Employment and Labour Demand

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, 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.

‘Knowledge-intensive’ businesses in Cherwell employ 8.6% of the workforce, marginally lower than the regional and national averages, as well as many other parts of Oxfordshire, but a higher proportion than in Hunts and Mid Beds.

The environment-related sectors currently account for 1.1% of the workforce in Cherwell, higher than the Oxfordshire (and national) average, but lower than the regional average and all other comparator districts.

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.

A relatively high proportion of Cherwell’s resident workforce works part-time (26.7%). This proportion is similar in Cherwell’s worker population.

Self employment in Cherwell is below the Oxfordshire and national average. Rates are only lower in Basingstoke & Deane and Huntingdonshire.

Vacancies in Cherwell are relatively concentrated in manufacturing, and also in distribution, hotels and restaurants.

Source: SQW

Characteristics of the sub-regional employment base

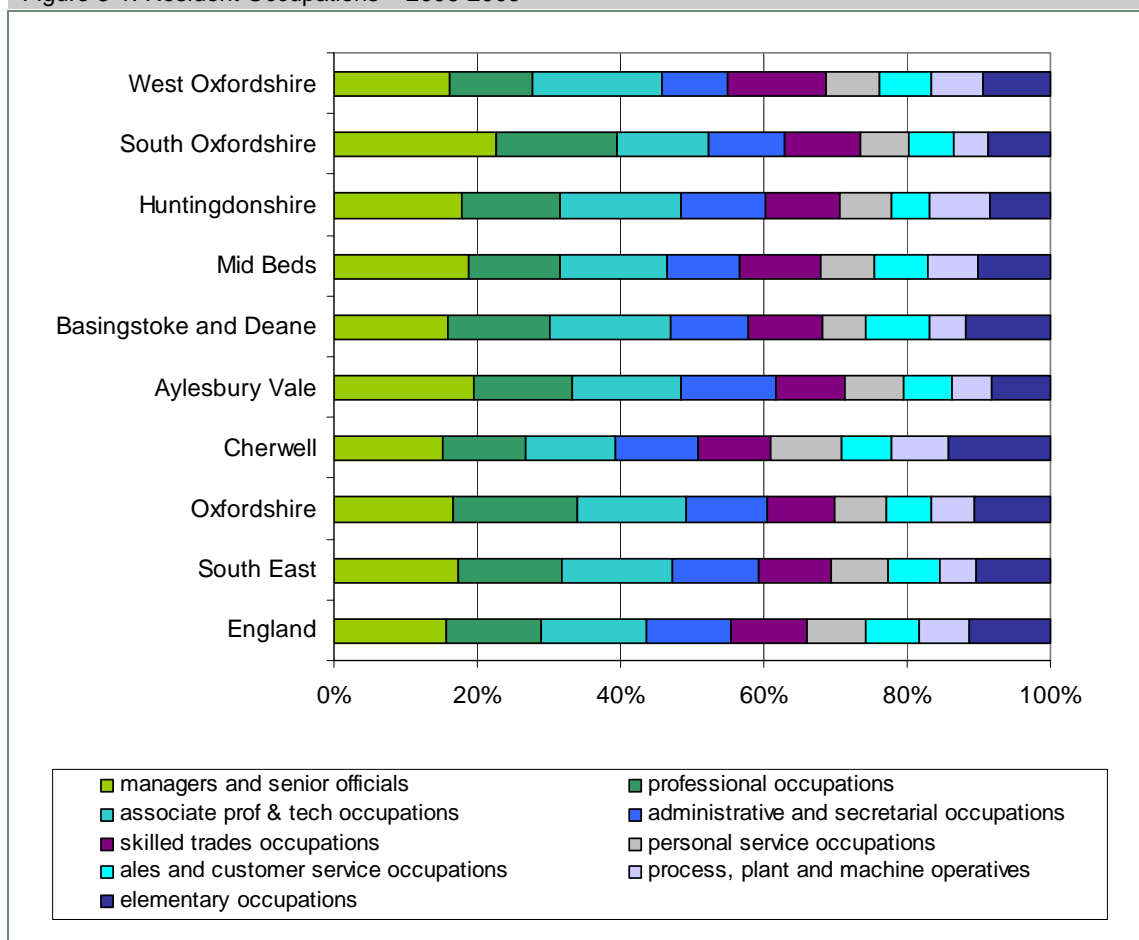
Occupations (Resident)

Table 3-2: 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 (worker)

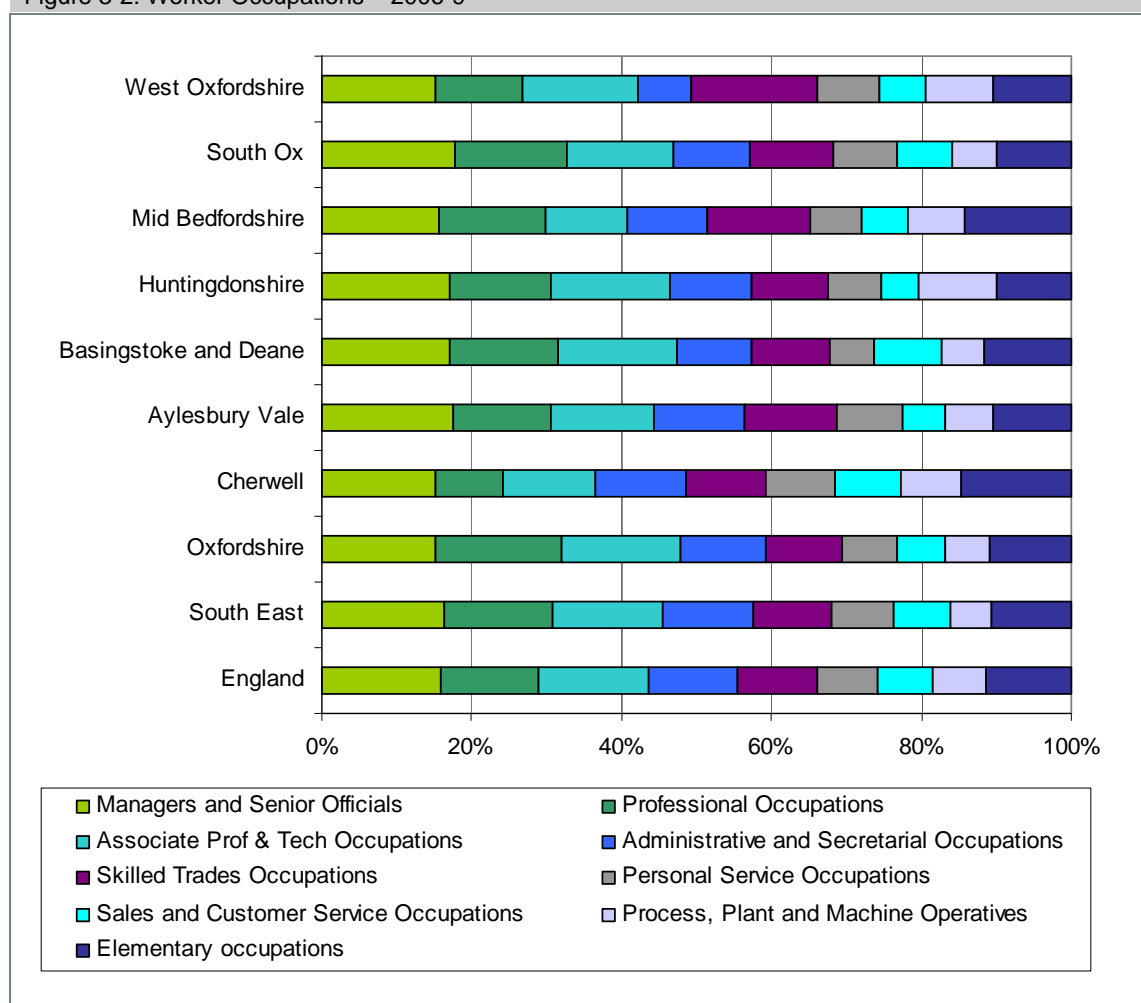
Table 3-3: Worker Occupations – Percentages - 2006-9

	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 occup-ations	Assoc-iate Prof & Tech occup-ations	Admin-istrative and Secret-arial occup-ations	Skilled Trades occup-ations	Pers-onal Service occup-ations	Sales and Cust-omer Service occup-ations	Process, Plant and Machine Opera-tives	Elemen-tary occup-ations
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

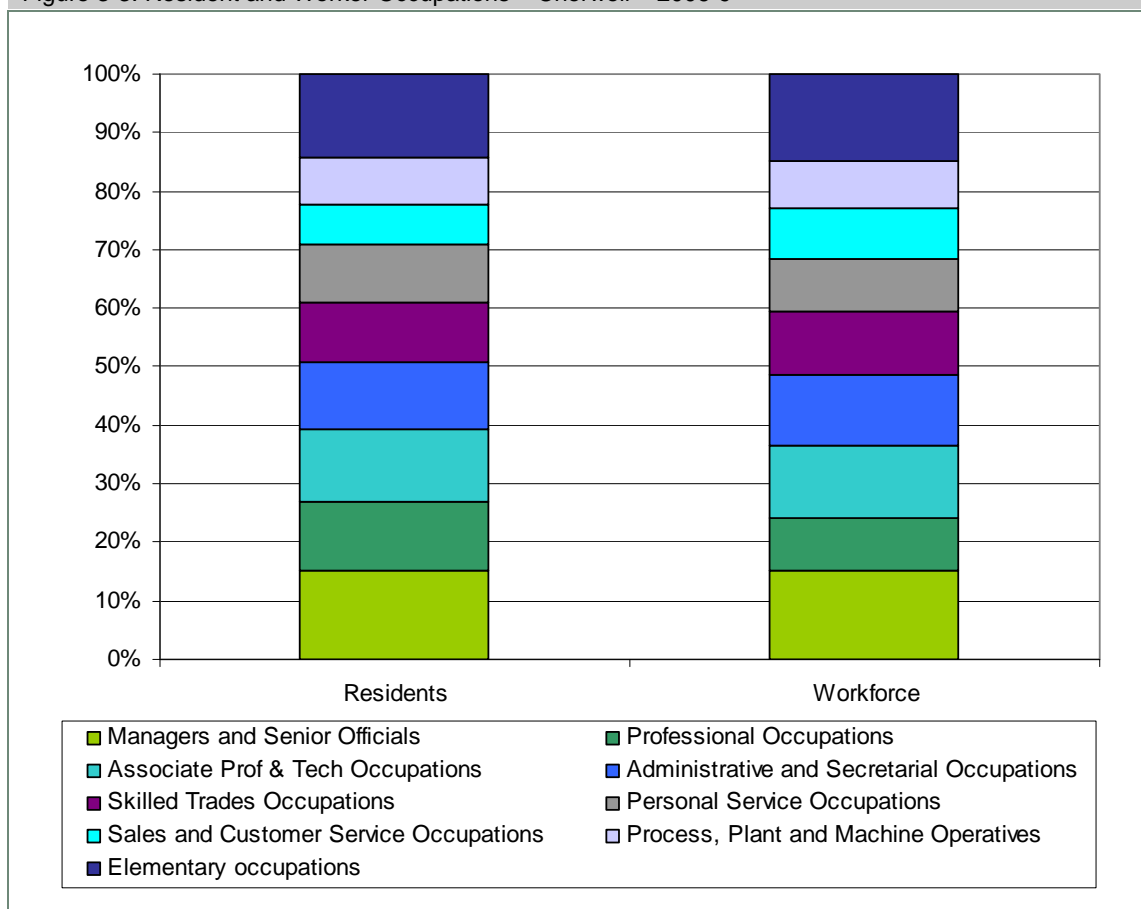
Source: Annual Population Survey, workplace analysis averaged 2006-2009

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 sectors – identifiable key sectors, including knowledge- and technology-related sectors and environment related sectors

Sectors – Cherwell

Table 3-4: 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
England									
South East									
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

	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
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

Sectors – Bicester

- 3.1 The following sectors are important employers in Bicester, employing more than 2% of the workforce).

Table 3-5: 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 %
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

3.2 The following sectors are significantly over-represented in Bicester (Bicester wards).

Table 3-6: 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

Other important sectors

Table 3-7: Other Important Sectors – Employee Numbers – Bicester (ward definition) - 2008

Broad Sectoral Definition	Industry	Employees	Percentage 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			
Research and Development	Research and Development	Too small to disclose	0.0 %	0.06
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

Knowledge Intensive Businesses (KIBs)

- 3.3 One way of measuring innovation within an economy is through identifying the number of businesses and employees that are regarded as “knowledge-intensive”. The Organisation for Economic Co-operation and Development (OECD) has a definition of a “Knowledge Intensive Business” (KIB) which can be translated into national SIC codes.³

Table 3-8: Employment in KIBs – Employee Numbers - 2008

	Number	Percentage of total workforce	LQ (SE Comparator)
England	2,419,785	10.5	
South East	417,508	11.1	
Oxfordshire	31,561	9.9	0.89
Cherwell	5,765	8.6	0.77
Aylesbury Vale	8,183	11.7	1.06
Basingstoke and Deane	12,171	14.6	1.31
Huntingdonshire	4,991	7.1	0.64
Mid Beds	3,248	7.4	0.67
South Oxfordshire	7,103	13.4	1.20
West Oxfordshire	4,400	11.3	1.02

Source: Annual Business Inquiry Employee Analysis 2008

The Environmental Goods and Services (EGS) Sector

- 3.4 The EGS sector is challenging to map, and there are some difficulties in translating the whole sector into a SIC code definition. Most definitions should therefore be treated as a proxy. We have used a definition of the ‘environmental and green sector’ used most recently in the Greater London Assembly (GLA) Economics’ paper ‘How Big is London’s Green Sector?’⁴ This assessment draws on definitions used previously by BIS, DEFRA, Experian and UKCEED, but is still only a proxy.⁵

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 activities; and radio and television activities

⁴ Simon Kyte, GLAEconomics – Current Issues Note 25. How Big is London’s Green Sector? 2010

⁵ GLA Economics’ SIC code definition includes agricultural services, forestry, manufacture of electrical distribution and control appliances, recycling of metals and non metals, water purification, waste scrap, sewage and waste treatment and sanitation

Table 3-9: Employment in the EGS Sector – Employee Numbers - 2008

	EGS Employees	% of total workforce
England	230,145	1.0 %
South East	41,121	1.1 %
Oxfordshire	2,907	0.9 %
Cherwell	722	1.1 %
Aylesbury Vale	979	1.4 %
Basingstoke and Deane	1,044	1.2 %
Huntingdonshire	1,062	1.5 %
Mid Bedfordshire	544	1.2 %
South Oxfordshire	762	1.4 %
West Oxfordshire	462	1.2 %

Source: Annual Business Inquiry Employee Analysis 2008

Table 3-10: Employment in the EGS Sector – Location Quotients (South East Comparator) - 2008

	LQ (SE Comparator)
South East	1.0
Oxfordshire	0.83
Cherwell	0.98
Aylesbury Vale	1.28
Basingstoke and Deane	1.14
Huntingdonshire	1.38
Mid Bedfordshire	1.14
South Oxfordshire	1.31
West Oxfordshire	1.08

Source: Annual Business Inquiry Employee Analysis 2008

Part-time versus full-time employment

Table 3-11: 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 %

		Full Time	Part Time
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

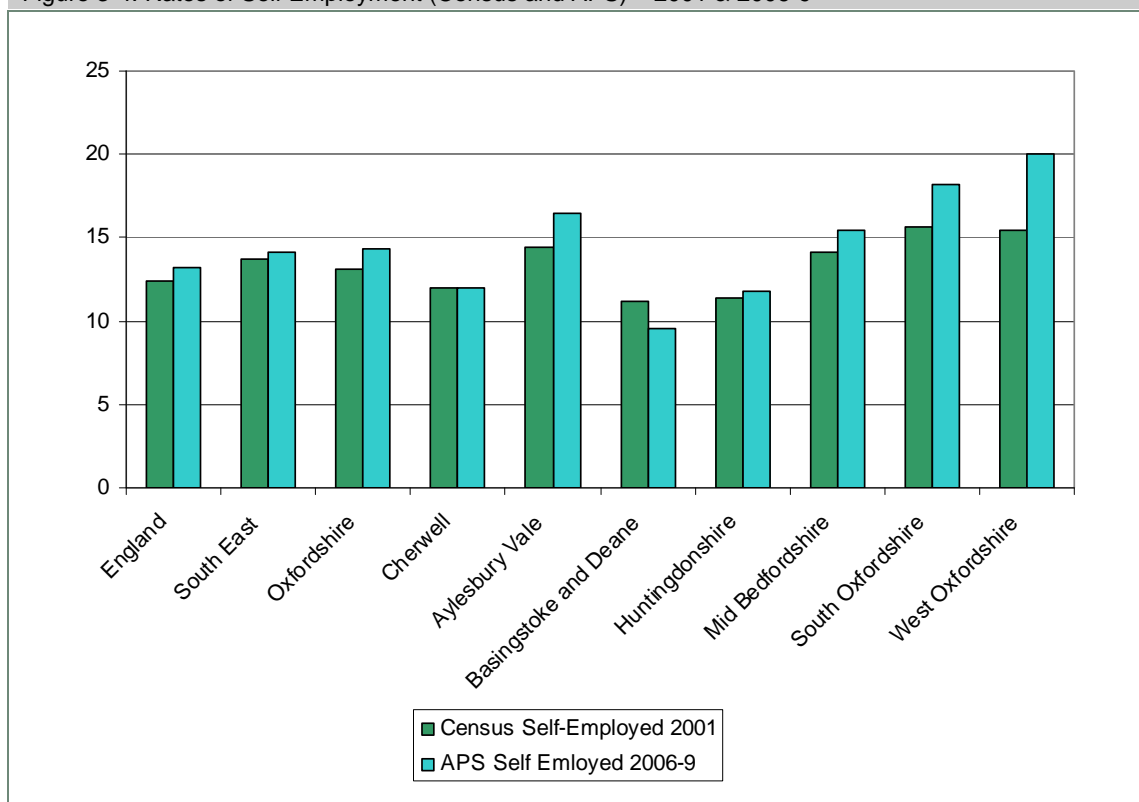
Self-employment

Table 3-12: 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 %
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)

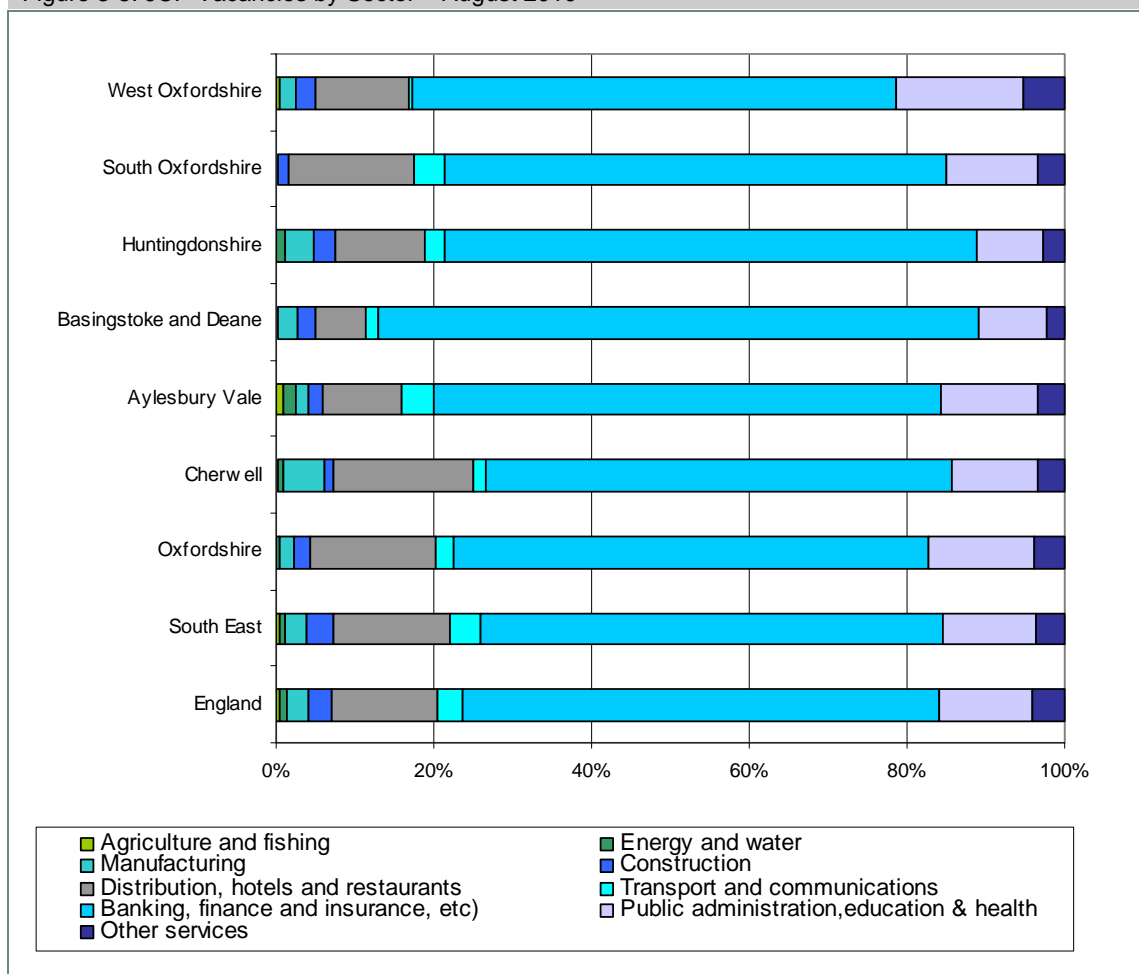
Vacancies across key sectors

Table 3-13: 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

- 3.5 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).
- 3.6 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.⁶ 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.
- 3.7 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.

⁶ Institute for Employment Research, University of Warwick. *Employment Projections for the South East of England*. March 2005

3.8 SQW have recently used LEFM projections for the South East as part of another study in the region.⁷ 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%.

3.9 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 3-14: 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

⁷ 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

Table 4-1: Key Findings – Business performance and competitiveness

The number of active enterprises in Cherwell relative to the working age population is low, compared to neighbouring districts and South Oxfordshire (Fig 5-1). 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") (Fig 5-4).

There is an occupational mismatch between vacancies notified to JCP and those available amongst residents (Fig 5-5), 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 (Fig 5-6).

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. (Table 5-4).

Per capita CO₂ emissions are relatively high (8.5t), (Fig 5-8) although this is mostly industrial and commercial. Much of this may be related to a high average level of commercial and industrial gas consumption (Table 5-7). 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.

Source: SQW

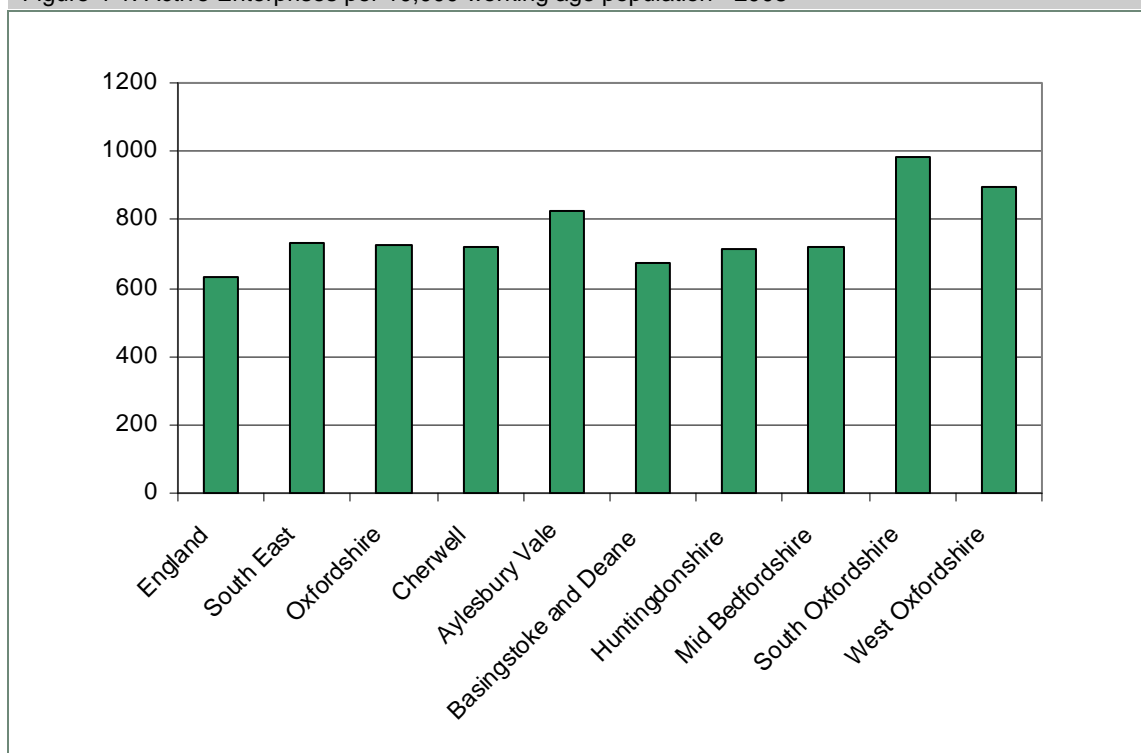
Business start-up activity – company births and deaths, VAT registrations across the sub-region

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
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

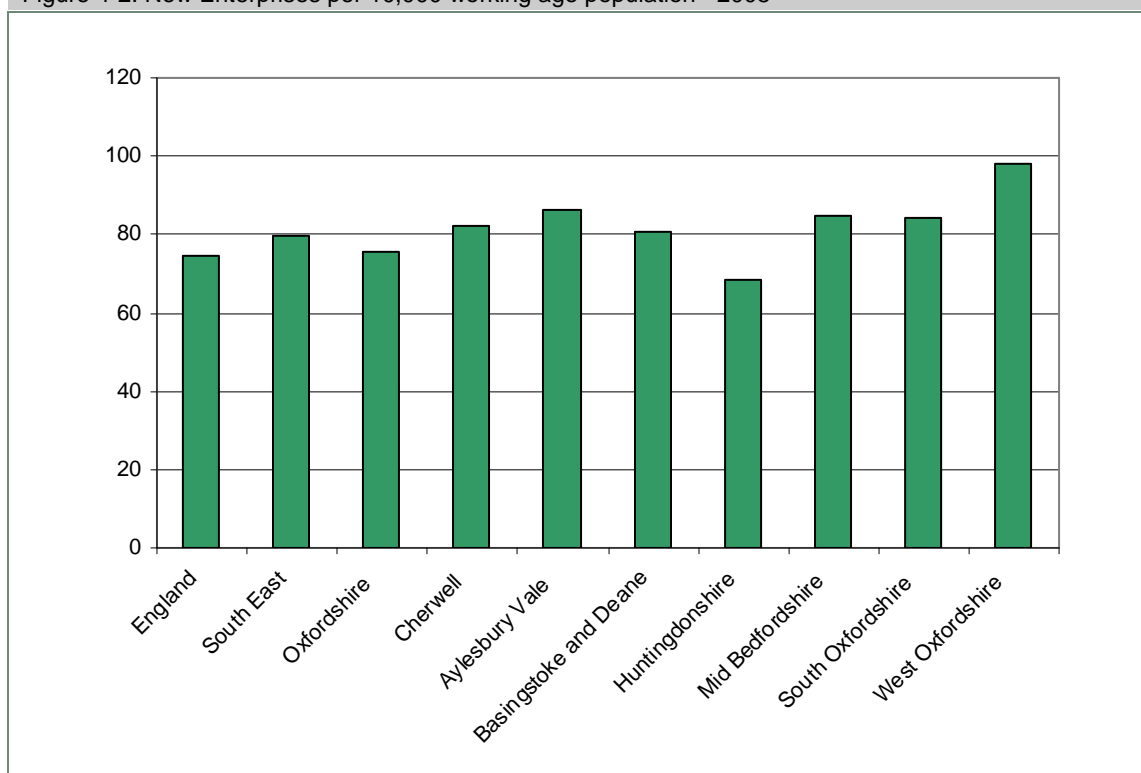
Source: Business Demography 2008 and Mid Year Population Estimates 2008

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

Table 4-2: Business Births – Percentage of all Active Enterprises - 2008

	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

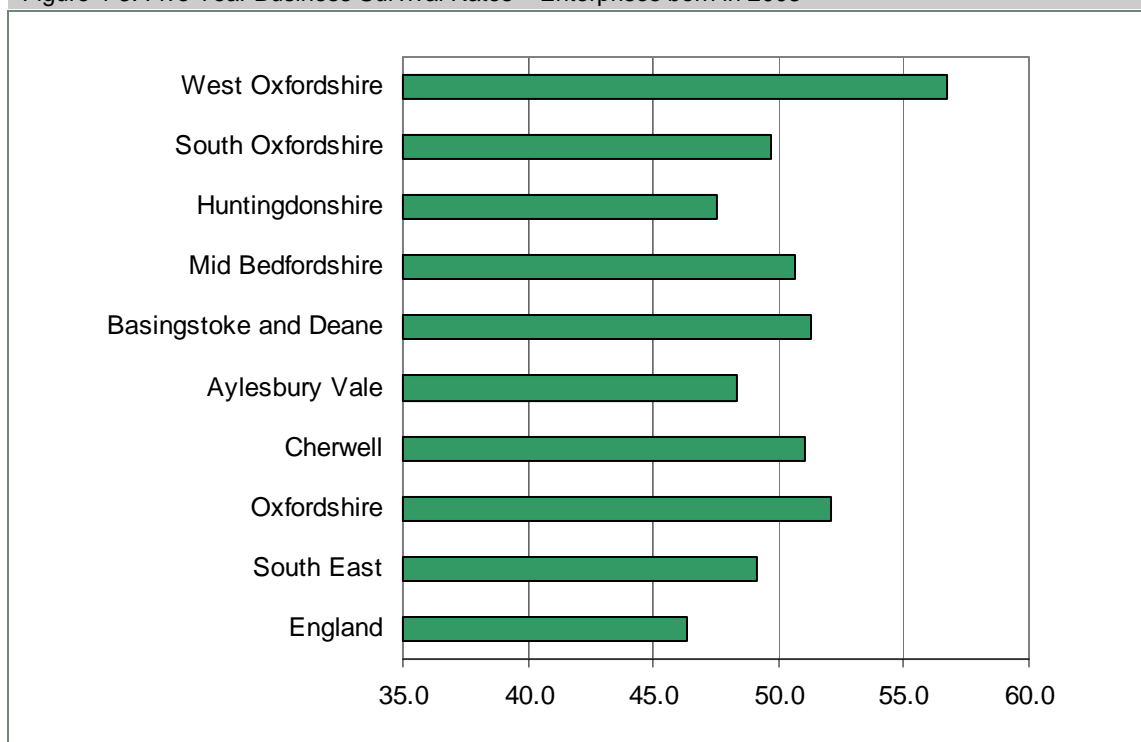
Business survival rates and business incubation activity

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

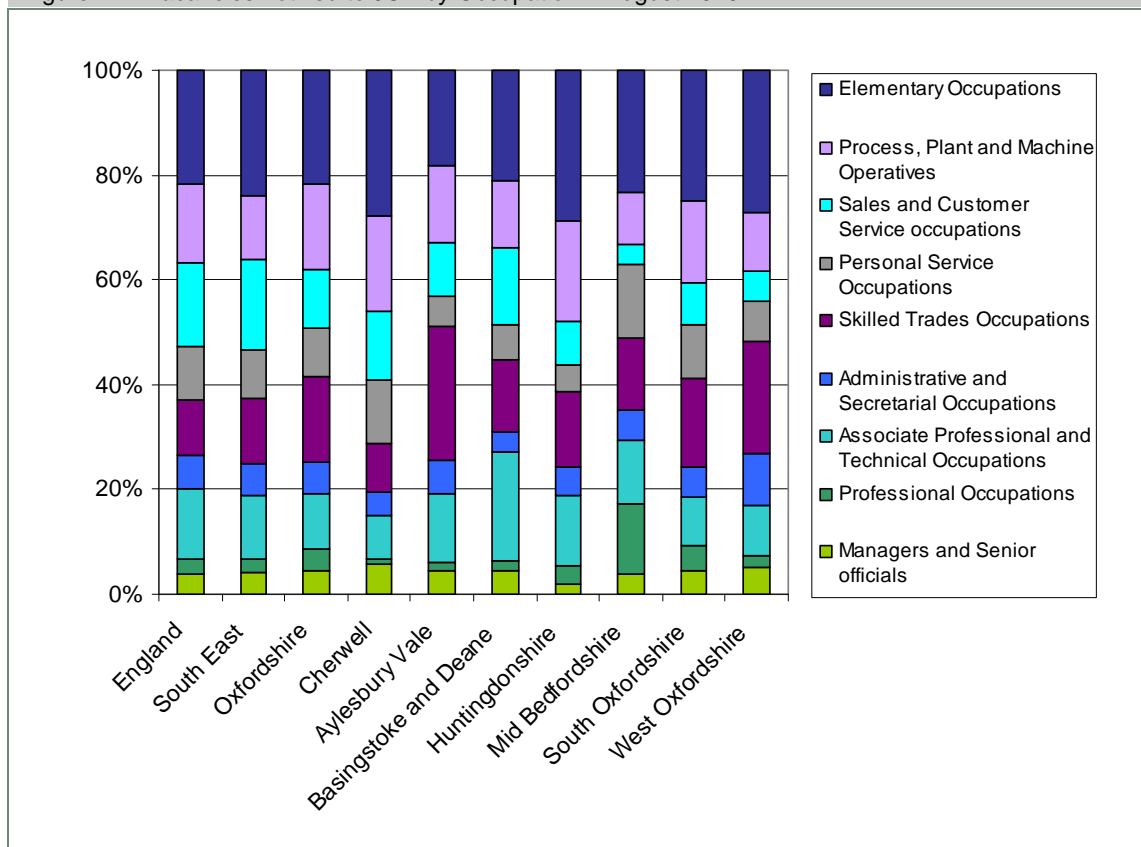
Figure 4-3: Five Year Business Survival Rates – Enterprises born in 2003



Source: Business Demography 2008

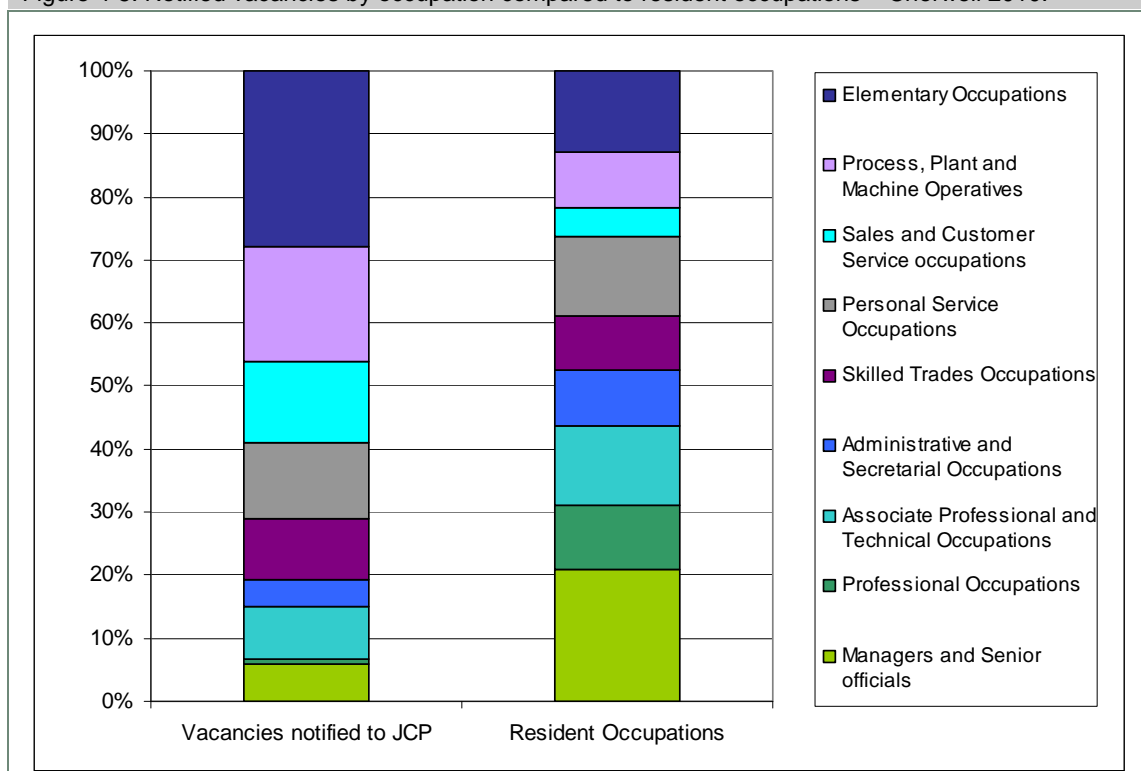
Job vacancies compared with the occupations of residents

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

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
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

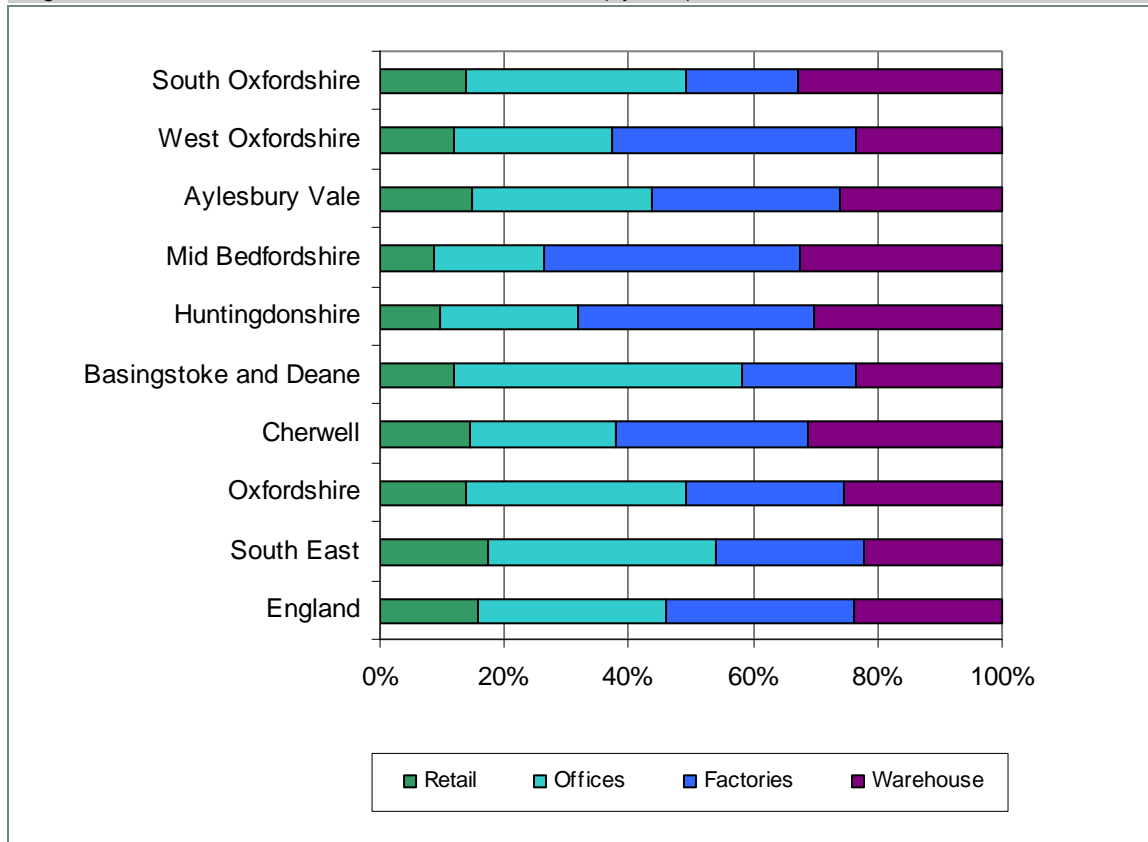
Source: CLG Commercial and Industrial Floorspace and Rateable Value Statistics (2005 revaluation), 2008

Table 4-5: Commercial and Industrial Floorspace (Retail & Offices) - 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	45.88
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

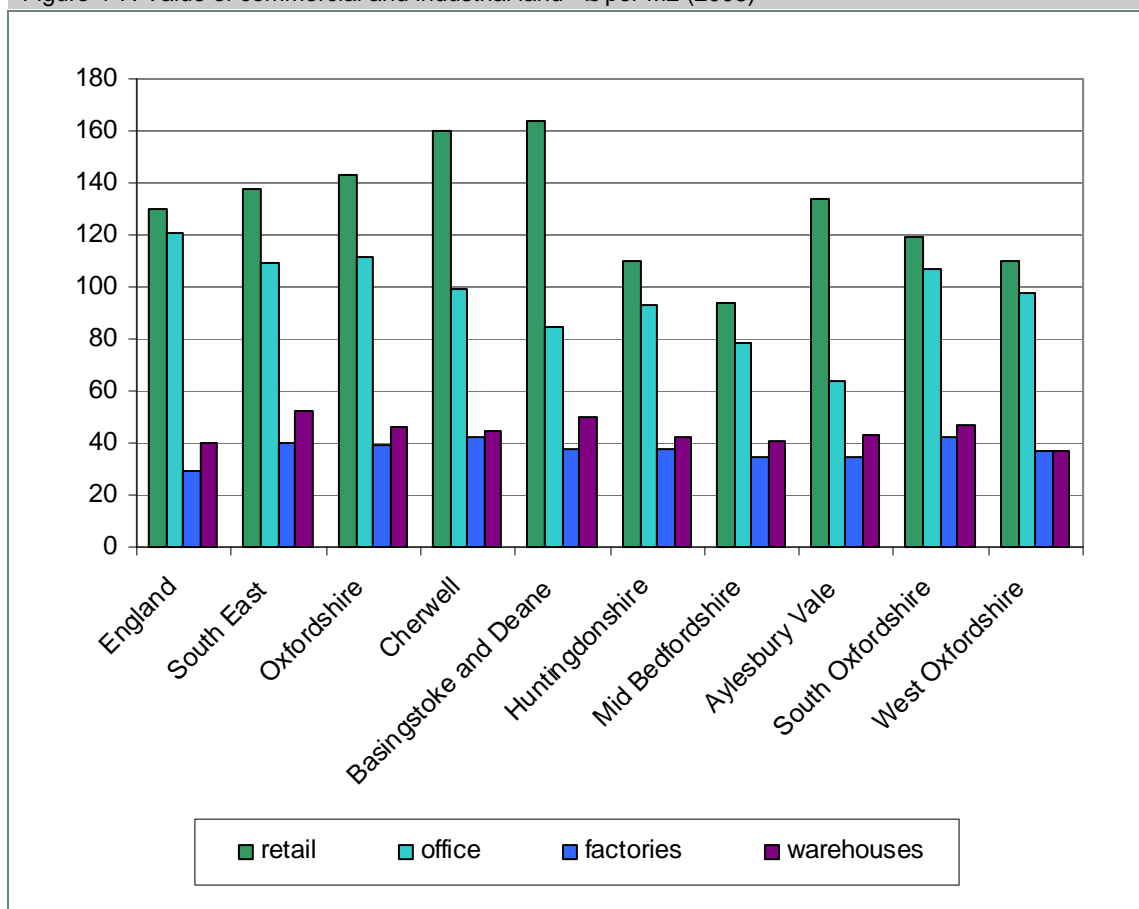
Source: CLG Commercial and Industrial Floorspace and Rateable Value Statistics (2005 revaluation), 2008

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

- 4.1 The nature and extent of the Environmental Goods and Services Sector are discussed in section 3.

Emissions and Energy Consumption

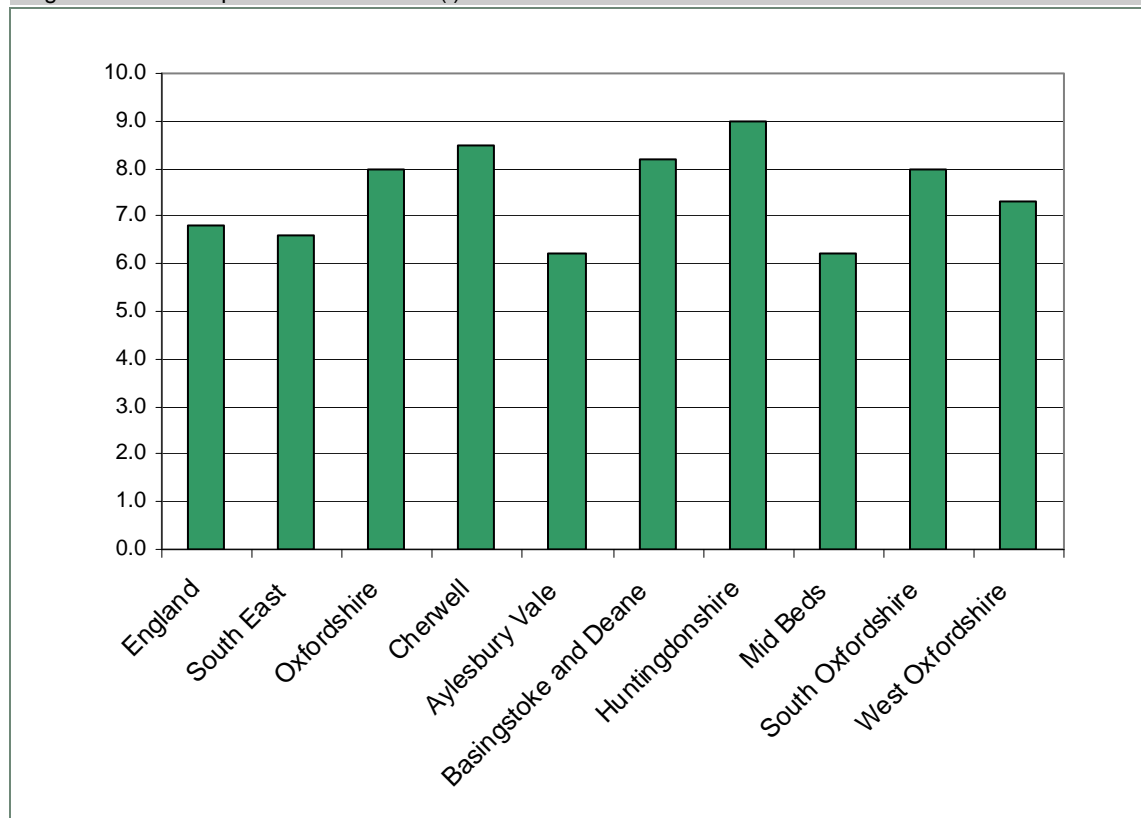
Table 4-6: Per Capita CO2 Emissions (National Indicator 186) - 2008

	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 %

	Industry and Commercial	Domestic	Road Transport	Total	Per Capita Emissions (t)	% per capita reduction since 2005
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 %

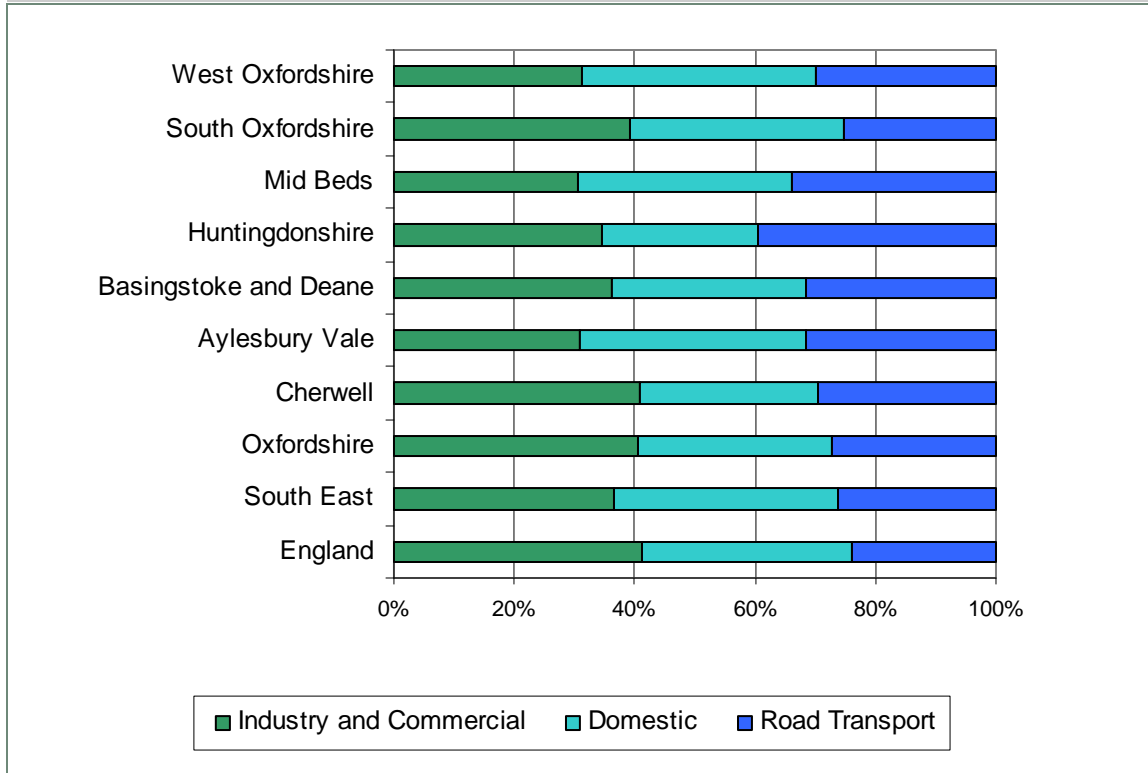
Source: DECC, Per Capita CO2 Emissions in the LA area, sector and fuel details. 2008

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



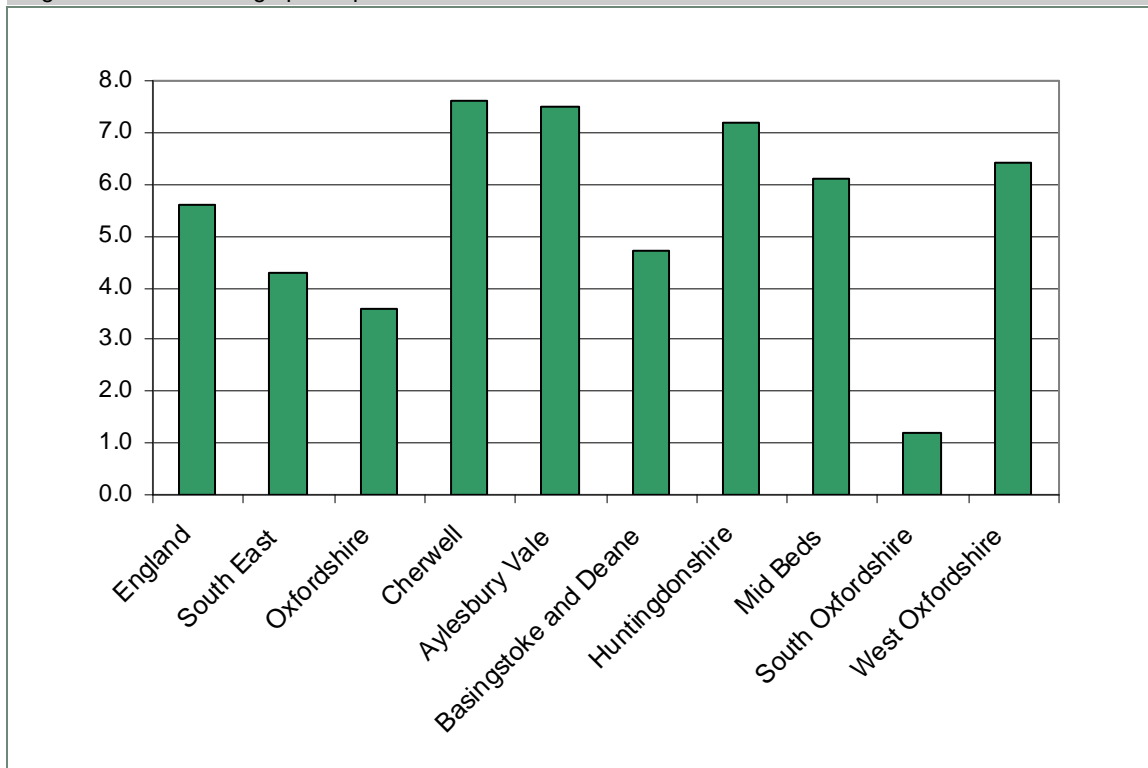
Source: DECC, Per Capita CO2 Emissions in the LA area, sector and fuel details. 2008

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 2006



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

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
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

5: Education, Skills and Training

Table 5-1: Key Findings – Education, Skills and Training

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). Attainment at A level and equivalent is markedly low. This finding is consistent with Cherwell's low rankings on the Indices of Multiple Deprivation Index 'Barriers to Education', as outlined in section 8.

Rates of participation for post-16 year olds are not readily available at district level. The most up to date information for Oxfordshire puts the proportion of 16-18 year olds Not in Education, Employment or Training (NEET) at 6.5%, above the regional average.

Training rates amongst employed population in Cherwell have fallen from 2006 (scoring neither high nor low against comparators) to 2009 (low, against its comparators, with just 18.1% of the employed population receiving training in the last quarter) (Table 6-3).

A relatively high % of working age population (9.4%) has no qualifications, although lower than regional and national averages. Almost a third (29.9%) have NVQ4+ qualifications, nearly 5% points below Oxfordshire (Table 6-4).

Source: SQW

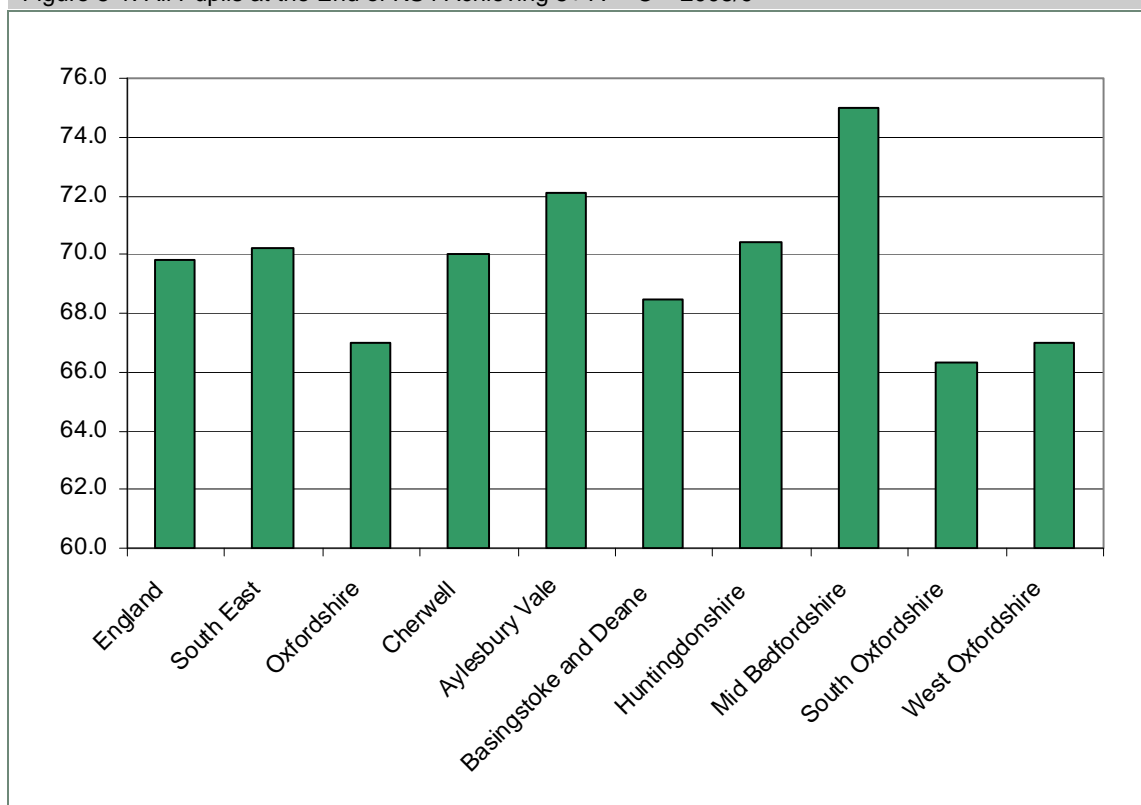
Key Stage 2 attainment, GCSE attainment, A Level attainment

Table 5-2: 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



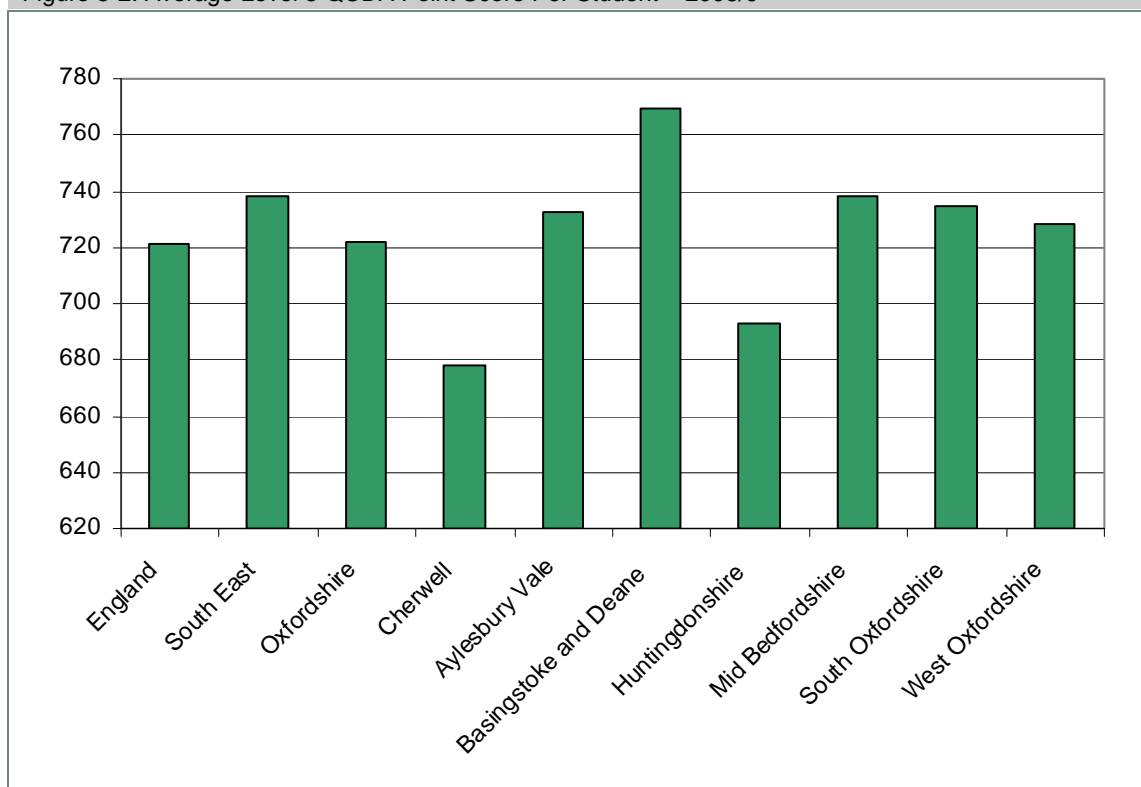
Source: DFE 2008/9

Table 5-3: 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	721.1
South East	738.5
Oxfordshire	721.7
Cherwell	678
Aylesbury Vale	732.4
Basingstoke and Deane	769.7
Huntingdonshire	692.6
Mid Bedfordshire	738.1
South Oxfordshire	735
West Oxfordshire	728.4

Source: DFE 2008/9

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



Source: DfE 2008/9

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

- 5.1 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.⁸

Ongoing participation in training by the working age population

Table 5-4: 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

⁸ DfE 2009 – Proportion of 16-18 year olds NEET.

	2006	2007	2008	2009
Basingstoke and Deane	27.1	27.5	21.5	23.3
Huntingdonshire	23.0	25.3	23.5	20.7
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

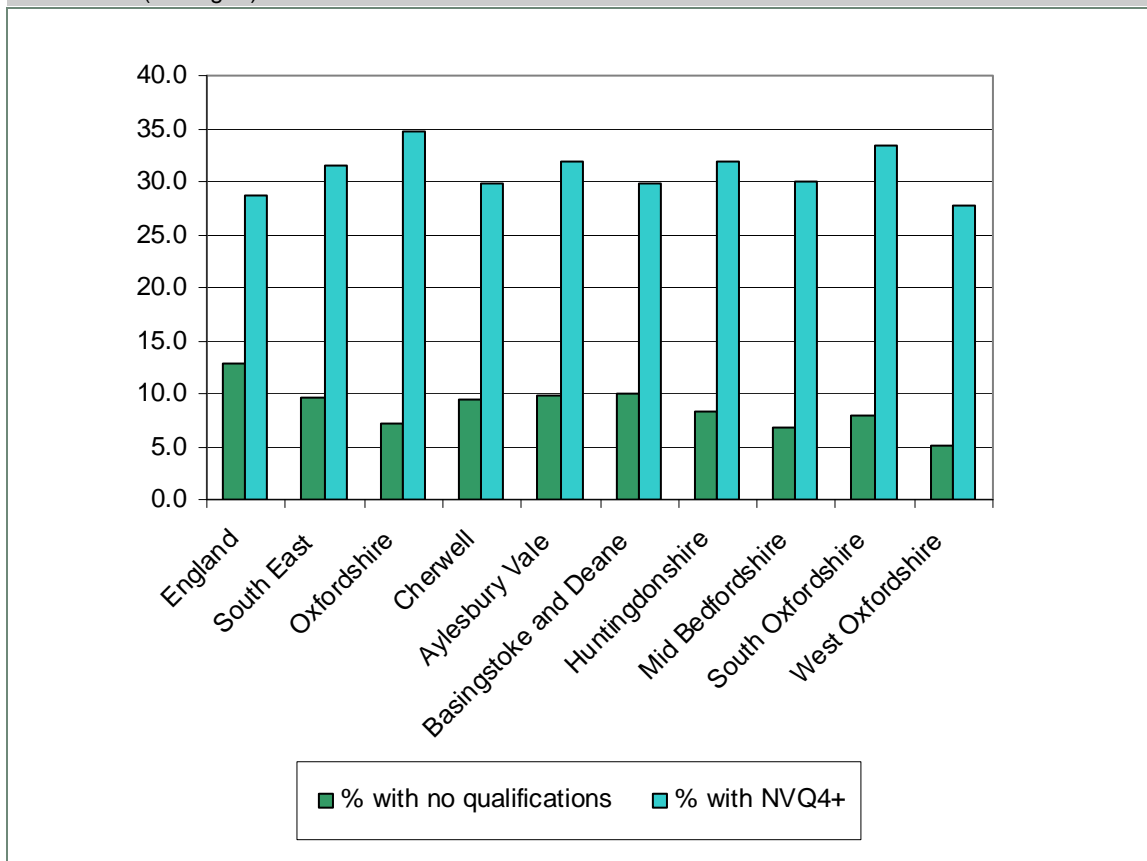
Nature and levels of various skills/qualifications within the working age population

Table 5-5: 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

5.2 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.⁹

⁹ <http://www.ocvc.ac.uk/>

- 5.3 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.¹⁰
- 5.4 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.
- 5.5 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.
- 5.6 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.

¹⁰ Oxford and Cherwell Valley College: Full Time Prospectus. 2011-12

6: Social inclusion and social infrastructure

Table 6-1: Key Findings – Social Inclusion and Social Infrastructure

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.

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.

Source: SQW

Unemployment rates – concentrations and groups

District – level unemployment rates

Table 6-2: 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 %

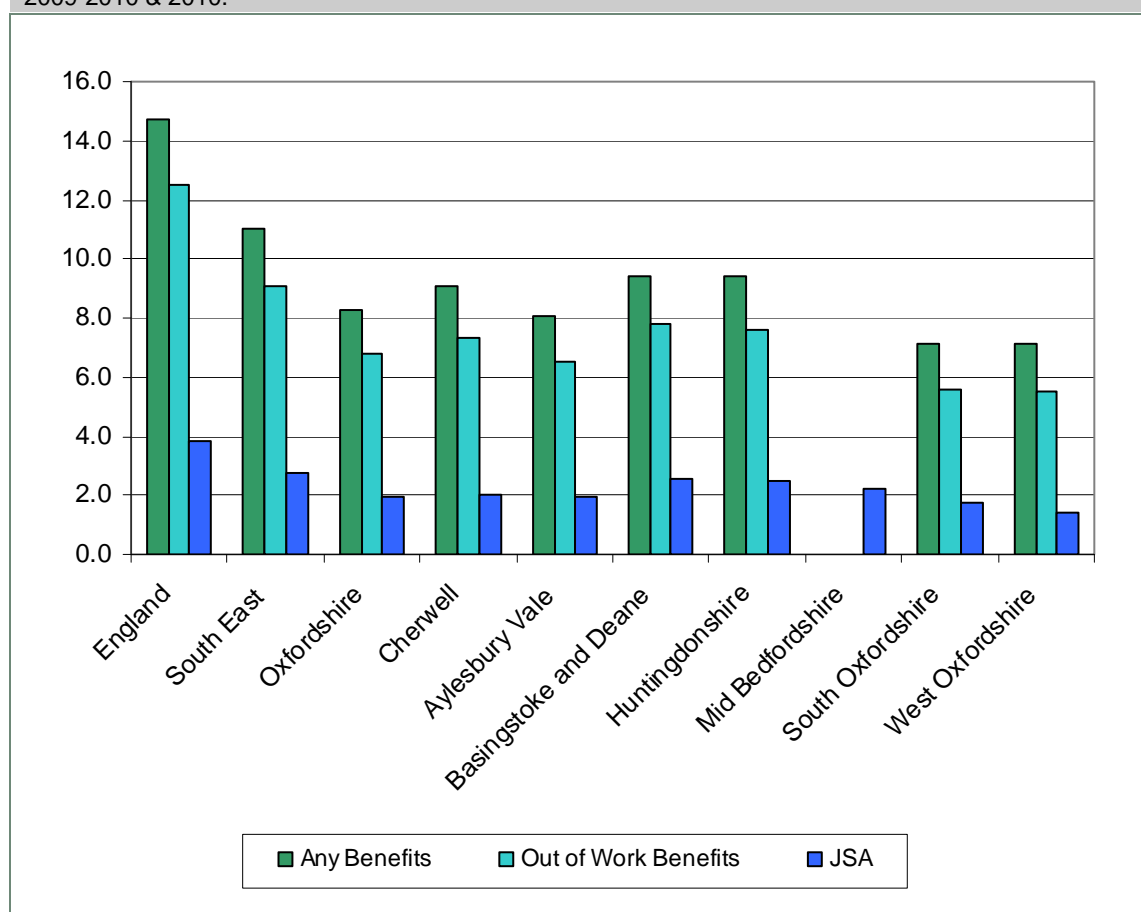
Source: Jobcentre Plus - Claimant Count with Rates and Proportions, 2010

Table 6-3: 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

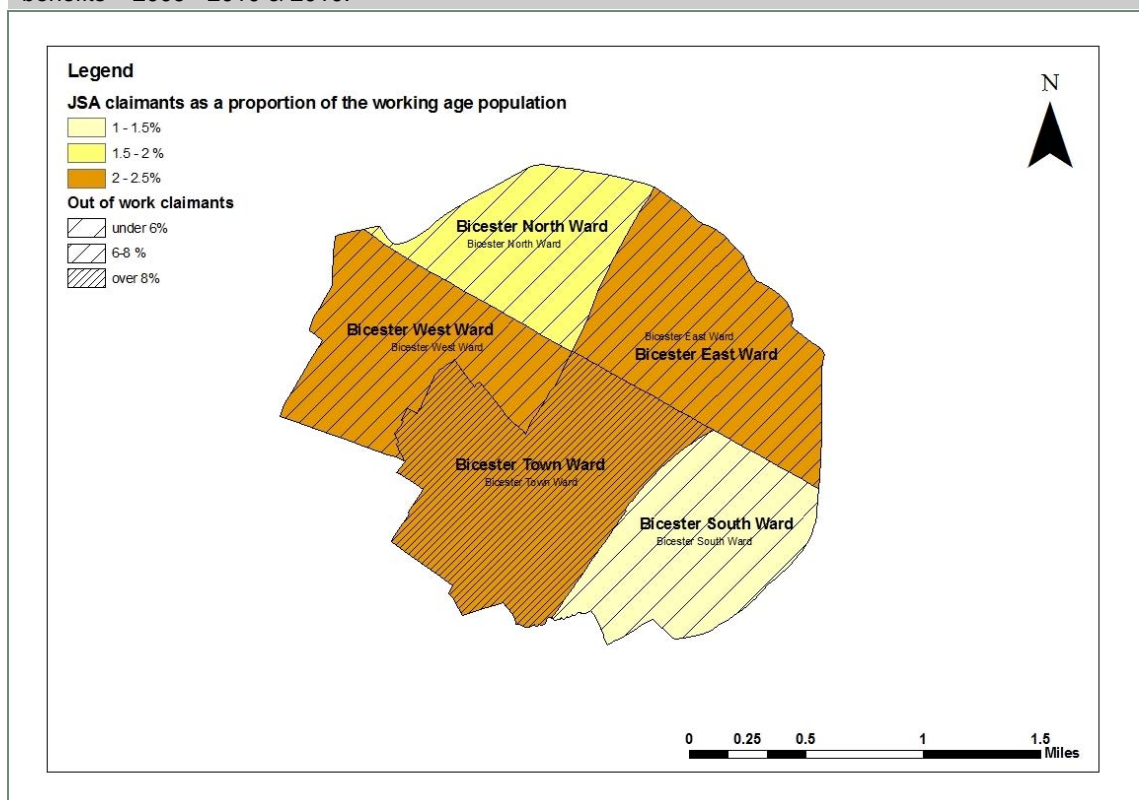
Bicester-level unemployment rates

Table 6-4: 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

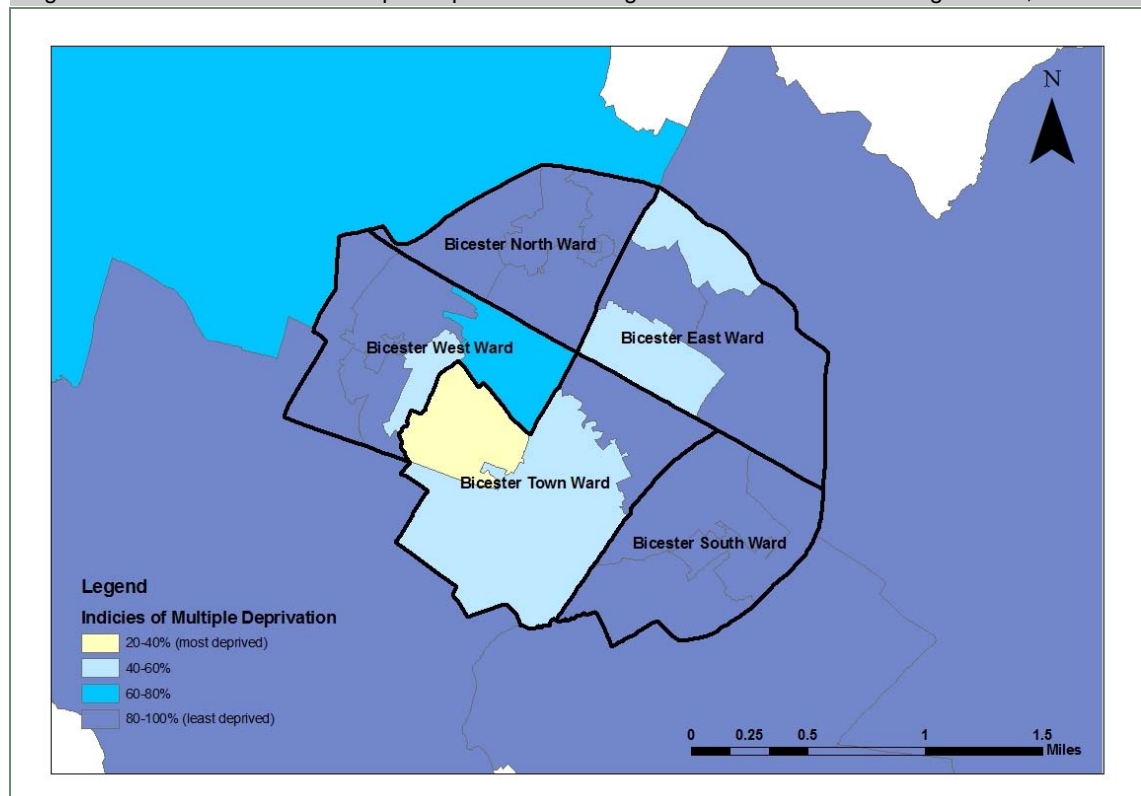
Social exclusion indicators – Index of Multiple Deprivation domains, 2007

Table 6-5: Deprivation Rankings – Bicester and surrounding LSOAs - 2007

Domain (Total SOAs – 23)	National Rankings				
	LSOAs in the most deprived 20 %	LSOAs 20% - 40%	LSOAs 40% - 60%	LSOAs 60% - 80%	LSOAs in the least deprived 20%
	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
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

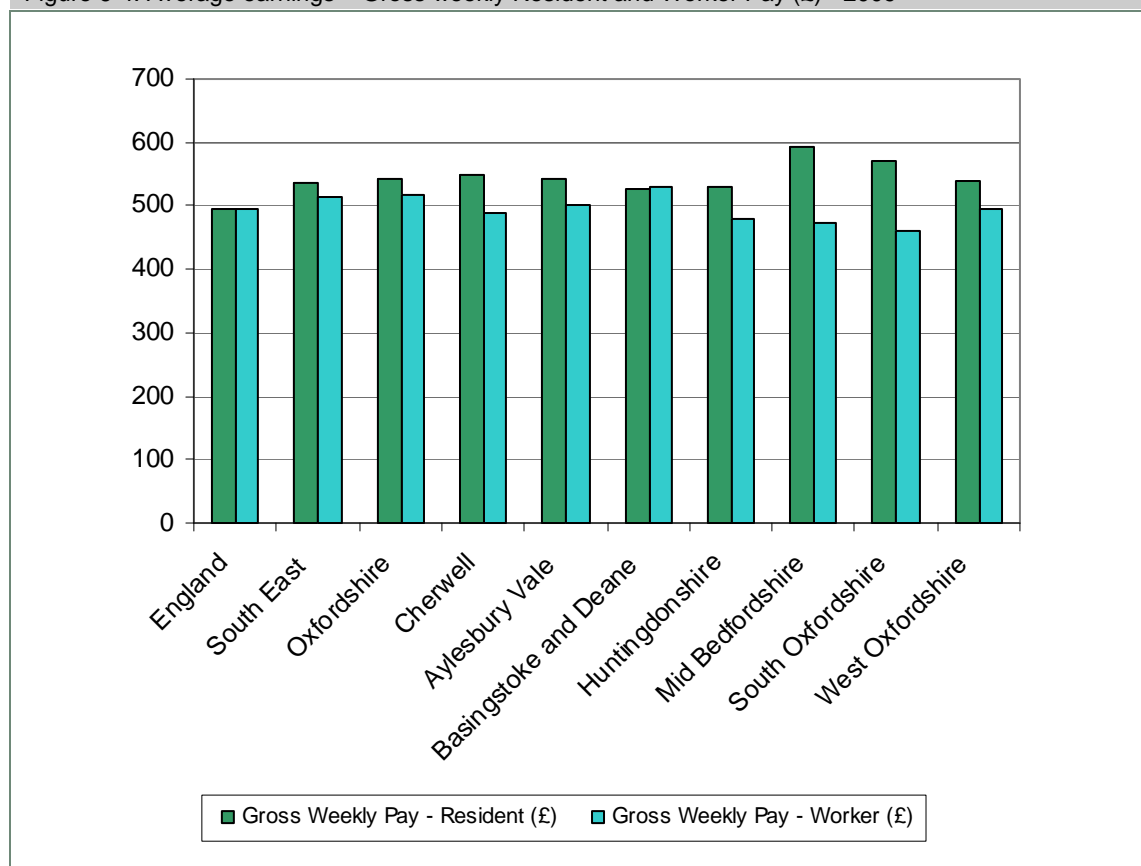
Average earnings and the incidence of low incomes

Table 6-6: 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
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

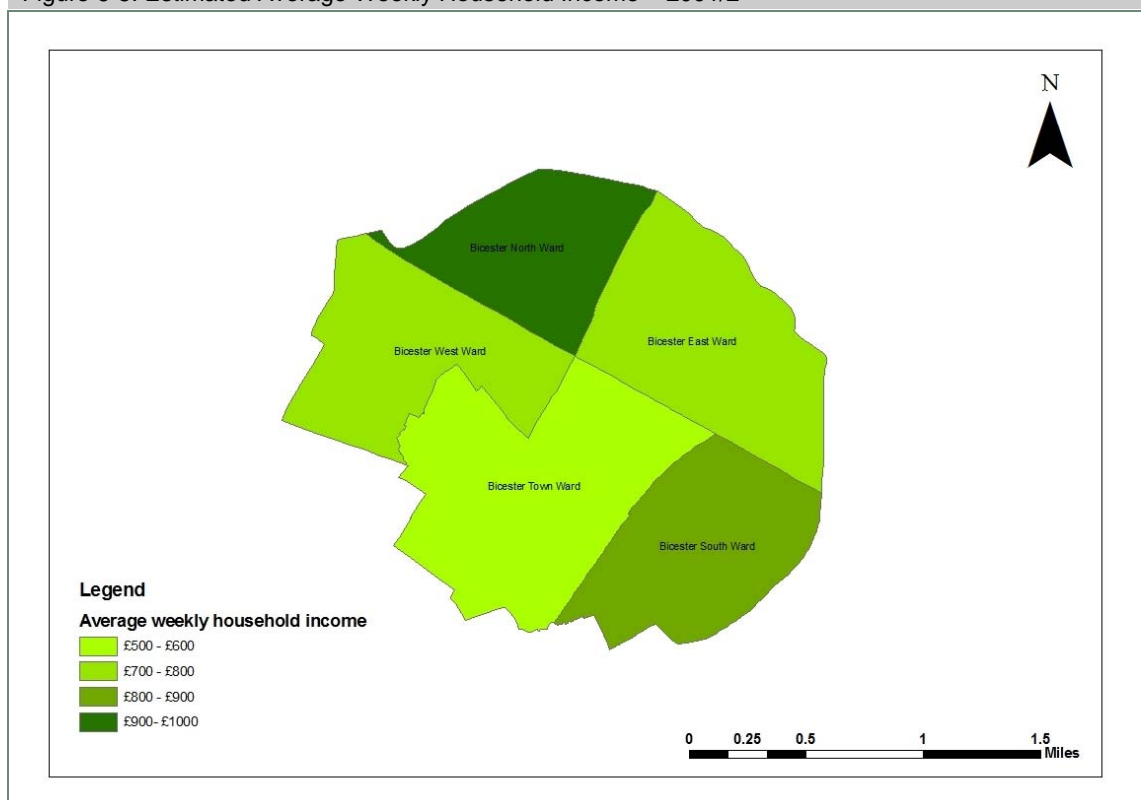
Source: Annual Survey of Hours and Earnings. 2009

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

Social Infrastructure

- 6.1 An Audit of Social Infrastructure Provision was conducted in October 2010 by Hunt Dobson Stringer.¹¹ 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 Matrix¹² 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.

¹¹ Hunt Dobson Stringer. *NW Bicester: Social Infrastructure Provision*. October 2010.

¹² Advisory Team for Larger Applications (ATLAS). *Social Infrastructure Matrix – Guidance Note*. 2009

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)
- 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

Table 7-1: Key Findings – Welfare and Community

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 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.

The crime rate in Cherwell is below the county and regional average, but above those for the other Oxfordshire districts (except Oxford city).

Source: SQW

Health-related characteristics of the population

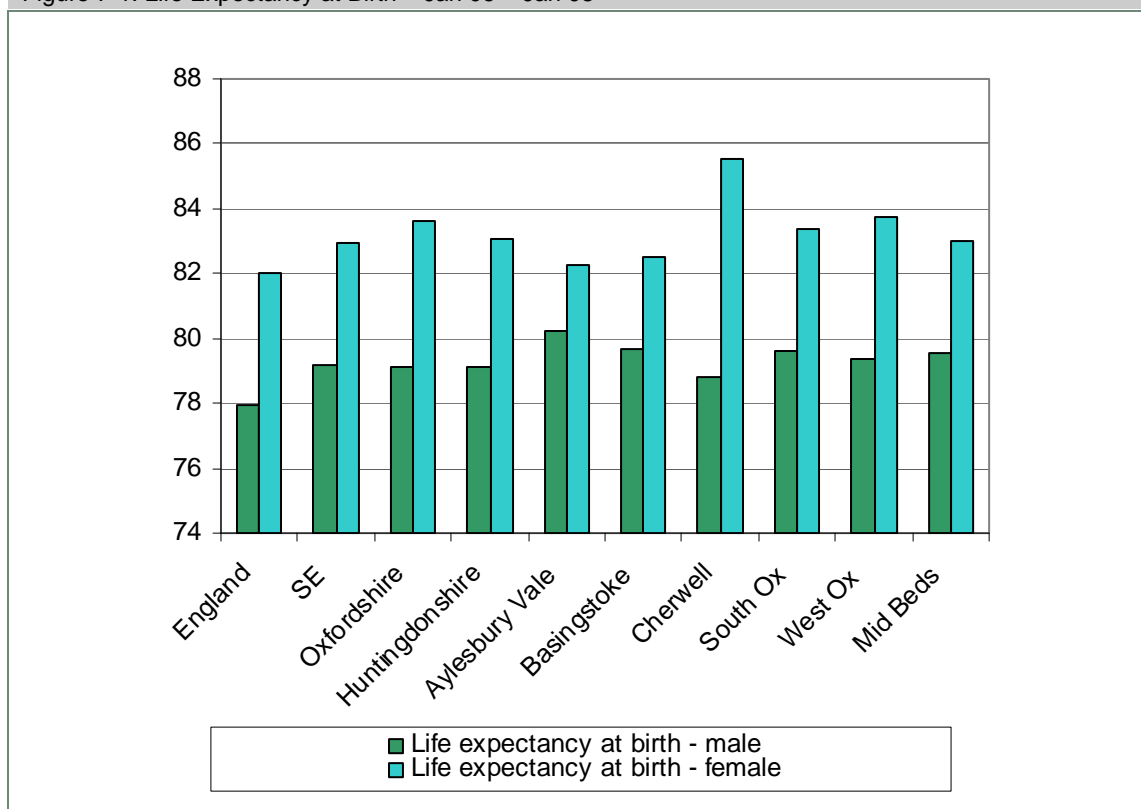
Table 7-2: Life Expectancy at Birth – Jan 06 – Jan 08

	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
West Oxfordshire	79.37	83.73
Mid Beds	79.53	82.99

Source: ONS 'Life Expectancy at Birth 2006-2008'.¹³

¹³ The dataset on life expectancy is due to be revised shortly by ONS

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



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

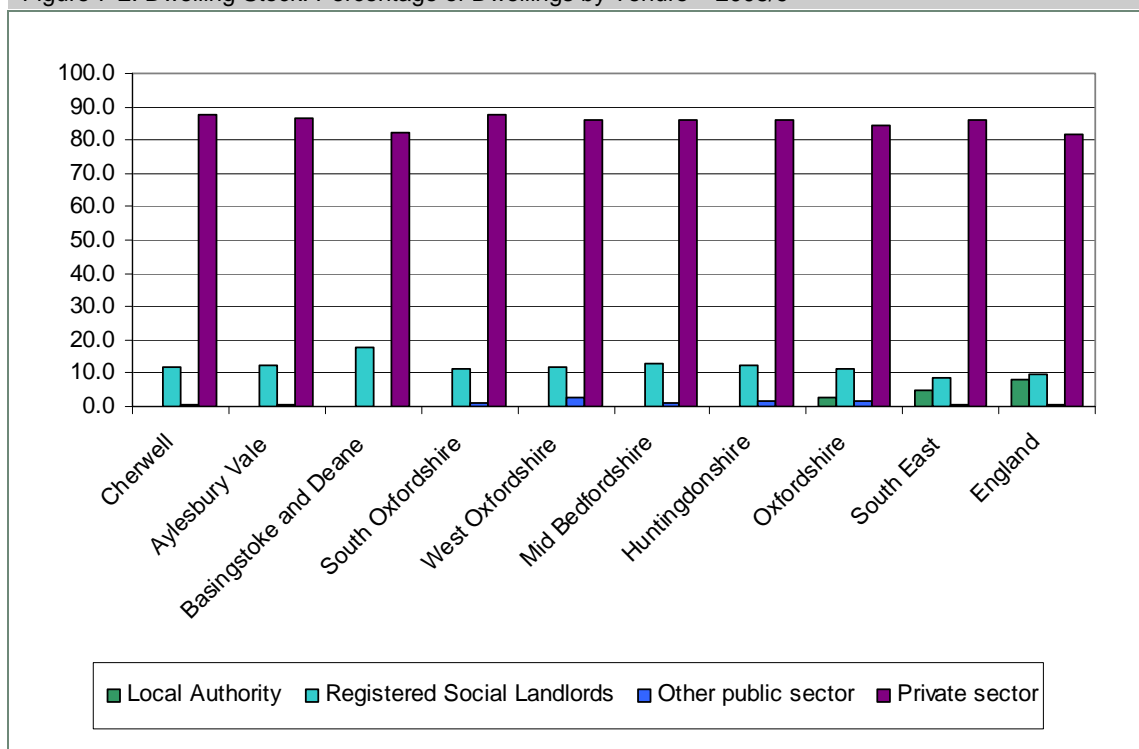
Characteristics of the housing stock

Table 7-3: 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
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



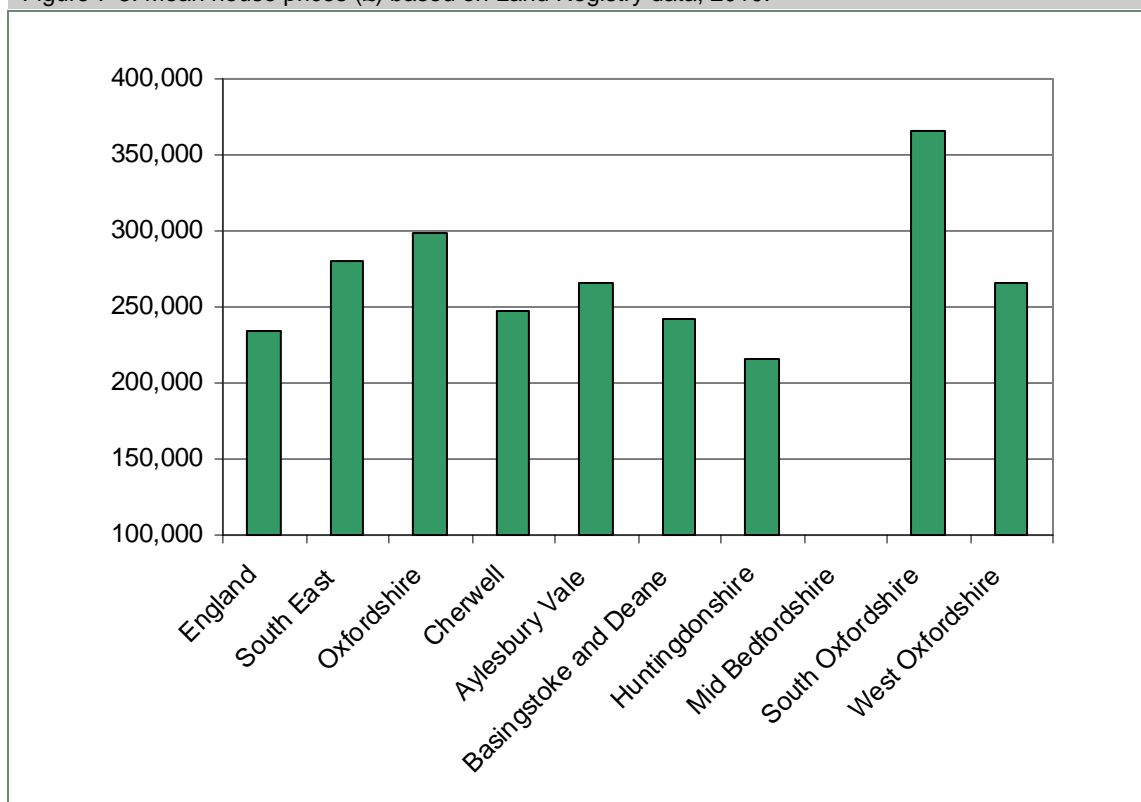
Source: CLG Live Statistics

Table 7-4: 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	-
South Oxfordshire	£365,152
West Oxfordshire	£265,768

Source: CLG Live Statistics

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



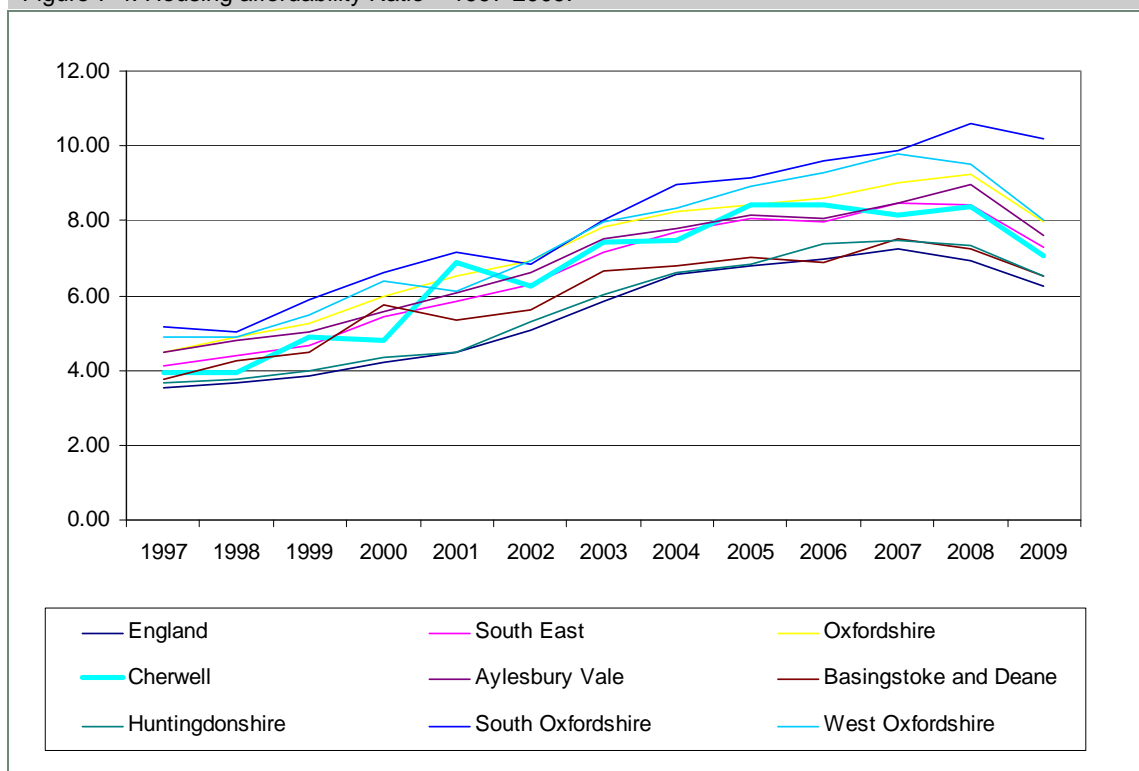
Source: CLG Live Statistics

Table 7-5: 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

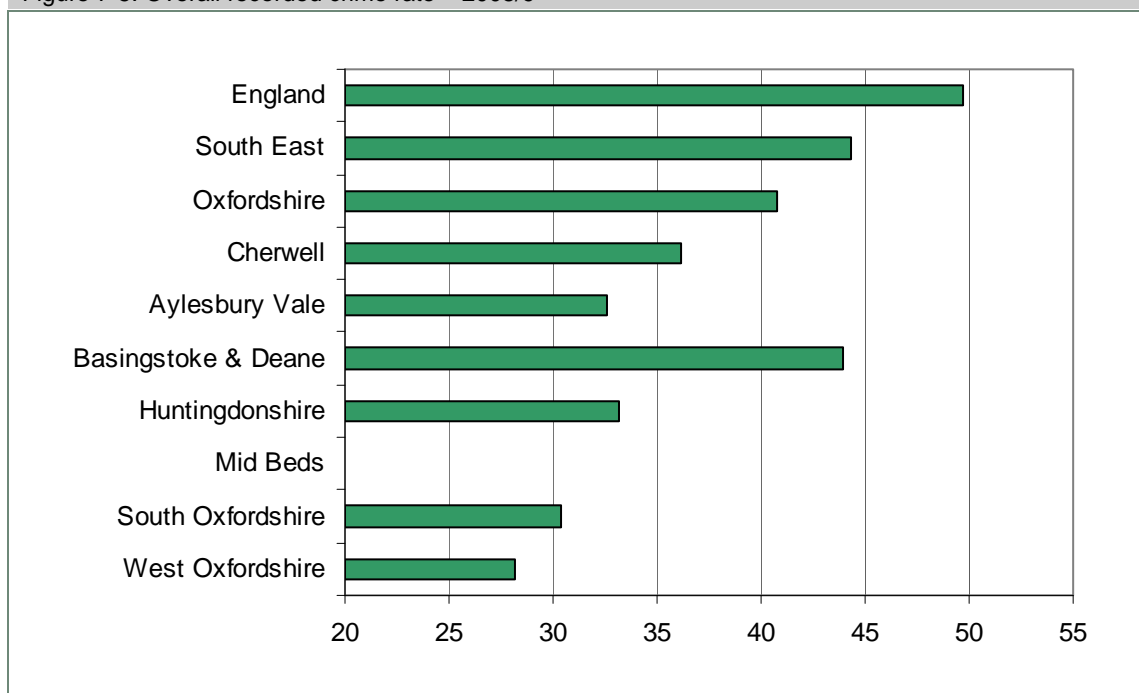
Characteristics of recorded crime

Table 7-6: 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