



WEST OXFORDSHIRE
DISTRICT COUNCIL

Economy Study Update

November 2012

www.westoxon.gov.uk/draftlocalplan

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EXECUTIVE SUMMARY

1. National Policy highlights the Government's priority to plan for sustainable economic growth to meet the needs of business and the economy and seek to address barriers to growth.

Businesses

2. West Oxfordshire has a relatively diverse economy with businesses spread throughout the main towns and rural areas. The area has a long history associated with manufacturing (e.g. Blankets) and engineering (Smiths Industries) but is diverse with key business sectors including:
 - **Manufacturing, Scientific and Technical Industries** – including high quality furniture (Wesley Barrel), safety equipment (JSP), timber frame construction (Stewart Milne), Motorsport (Lotus F1 and Caterham F1), Medical equipment (Siemens, Abbot Diabetes, Owen Mumford), Engineering (ICE Oxford Cryogenics)
 - **Retail** – the area's town centres are generally vibrant with low vacancies but West Oxfordshire's 'High Streets' will face challenges due to the growth in online retailing and development in competing centres such as Oxford.
 - **Tourism** – a growing sector estimated to be worth £255m to the local economy, reflecting the area's attractive environment, Cotswold towns and villages, River Thames and attractions such as Blenheim Palace and the Cotswold Wildlife Park.
 - **Military Aviation** – RAF Brize Norton is located adjacent to Carterton and is the largest strategic air transport base in the country employing some 6000 personnel. Other businesses such as the AirTanker aerospace consortium and Serco are also engaged in the activity of the base.
 - **Rural economy** – whilst employment in agriculture is small (2%) and declining in line with the national trend, it remains an important sector for the management of West Oxfordshire's attractive countryside and rural communities. Otherwise businesses in rural areas are engaged in similar sectors to those in urban areas although tend to be smaller and there is more home working and self employment. High speed broadband is a particular requirement facilitating their success.
3. Small businesses are a key component of the local economy with 70% of the total number of businesses in the District employing less than 5 people. New business growth is reasonable but business survival is above average.
4. Businesses in the District are part of the **Oxford Bioscience Cluster** particularly the manufacturing of medical devices (Abbott Diabetes and Owen Mumford) but also including diagnostics, laboratory supplies and other support services.

Labour

5. The area has very high economic activity (84.6%) and employment rates (81.6%) with correspondingly low unemployment (1.4%). The skill base is good with above average numbers qualified to degree level and this is reflected in residents' occupations. Many professionals and managers however commute out of the area and the average wage for workers in the area is lower than the average wage for residents. House prices are high and lower quartile house prices almost 10 times lower quartile earnings.
6. More businesses in West Oxfordshire reported recruitment difficulties in 2012 compared to 2008 whilst Oxfordshire wide, recruitment difficulties are a particular problem in the manufacturing, science and technology sectors. This relates both to a lack of applicants and also a requirement for workers with technical skills with employers seeking improved 'work readiness' from school leavers.
7. Labour force projections indicate that the labour force is expected to increase to 2016 but then begin a slow decline which is linked to an ageing population and fewer workers per household in the future.
8. Past Census data has indicated that significant numbers of workers (18,000) left the District to work although the net outflow of workers is less (8,000) – new 2011 Census data is still awaited. There is potential to claw back commuters particularly if the older working population seeks to reduce commuting, hours or increases self employment and homeworking.

Infrastructure and Communications

9. Transport infrastructure is a key issue which impacts on the local economy – including congestion on major routes such as the A40 but also within the main towns such as Witney and Chipping Norton. There are views in the commercial property market that traffic congestion deters businesses from locating in the area. There are plans to improve movement in Witney, including new road connections to the A40 in the east and west.
10. Rail services have recently been improved along the Cotswold Line but do not link the main towns. Parking for commuters is an issue but there are plans to improve this at Charlbury and Long Hanborough.
11. The availability of high speed broadband is more limited and there is likely to be a market failure in its roll out to rural areas which will need to be addressed.

Commercial Land and Property

12. The 2012 Employment Land Audit indicates limited changes to the stock of employment premises since the 2007 audit which indicated a good range of sites in terms of quality, type and distribution. Most of the sites are fully developed and vacancy is low. In 2007 much of the stock was noted as ageing and of average quality by national standards. Several sites had some vacancy but none to the extent that it would indicate the sites had become unviable and should be considered for other uses.
13. The take up of past Local Plan employment land has continued particularly to the west of Witney where limited land (7ha) now remains without developer interest. An application for the local plan reserve site including a further 10ha of

employment land west of Witney has been submitted. Take up of previously allocated land east of Carterton has been slower and 5ha of development land remains in addition to vacant buildings. In Chipping Norton, there has been significant and ongoing expansion of Owen Mumford and approximately 5ha of development land remains to the east of the town. Allocated land at Lakeside, Standlake (1.9ha) remains undeveloped.

14. Demand for premises in West Oxfordshire was considered lower than for other areas of Oxfordshire (e.g. Bicester, Milton Park and Harwell), with most interest geared towards industrial type premises and mostly locally generated. Some market views attributed the relative lack of inward investment enquiries to transport constraints with areas of more demand being on the A34 corridor.
15. No major gaps were identified in the supply of premises overall although market views considered that quality accommodation and particularly small industrial units were in short supply. There has been limited investment in new property over the last 5 years particularly on land allocated for employment uses on the edge of Witney and Carterton. The ageing of the stock is highlighted as an issue and the economics of both refurbishing premises and new build (particularly speculatively) are difficult because of a lack of banks lending.
16. Witney is seen as the main location of demand for good quality small to medium sized office units with incubator office space provision increasing recently to meet demand. Small and larger industrial units are also in demand but with limited supply and development land running out. The proposed additional 10ha of employment land at West Witney was considered by agents spoken to as being sufficient for the next 10-15yrs.
17. Carterton is considered an area of more limited demand and more on the industrial side and for smaller premises. The area was however noted as an expanding market and although available land and premises was seen as adequate for the short to medium term, more land could be needed in the longer term should one or two aircraft related business choose to locate in the town and take up the currently available land.
18. Chipping Norton was also identified as an area of more locally generated, limited demand and again more on the industrial side. Good quality small industrial units are typically well occupied with limited available supply. Design and build opportunities for offices and light industrial premises remain in the town.
19. In other areas, the supply of office premises appears sufficient but in common with other areas there is stronger demand and limited supply of good quality small industrial premises. An ongoing but limited supply of barn conversions is considered appropriate and particularly in more accessible locations with high speed broadband connectivity.

Oxfordshire Local Enterprise Partnership (LEP) and Competing Areas

20. The Oxfordshire Local Enterprise Partnership (LEP) was launched in 2011 and focuses on developing markets in green technologies, advanced materials and engineering, and higher value R&D science based sectors. The locational focus of the LEP is the A34 corridor including Science Vale (Abingdon – Didcot area), Bicester and Oxford. Work priorities are also to improve fast broadband

connectivity, skills and employability, inward investment, business finance and infrastructure.

21. Science Vale is a particular focus for internationally significant science and research activity including the Diamond Light Source at Harwell, the UK Atomic Energy Authority's JET experimental fusion facility at Culham and Milton Park one of the largest business and science parks in Europe. This area has been designated as an Enterprise Zone, has land available and attracts commuters from West Oxfordshire.
22. There are proposals to improve Oxford's West End including significant new shopping and office provision and also the Northern Gateway proposal which seeks to deliver office and R&D development with highway improvements linking the A40 and A44. Otherwise Oxford has limited development land availability.
23. Significant employment land release is proposed at Bicester an identified growth area and 'eco-town' location. The town is close to the M40 and A34 and has strengths in logistics but is also seeking to attract high technology businesses. Development land is also being made available at Banbury, a strong motorsport location and Kidlington, a centre for R&D activity linked to Oxford.
24. Swindon located on the M4 to the south west of West Oxfordshire is a growth area but serves a different business market to West Oxfordshire, notably business services and car manufacturing, but does attract some commuters from the District. To the west, Cotswold is a mainly rural area and important tourist area but has few large employment areas.

Strategic Recommendations and Land requirements

25. From this economic review the key strategic recommendations would appear to be:
 - Increase the supply of land for businesses to support key industrial, manufacturing, and engineering sectors (including the Oxford Bioscience Cluster and aviation businesses related to RAF Brize Norton) and facilitate investment in the stock of business premises.
 - Address transport congestion in towns and on major routes such as the A40. Although this is not a 'quick fix'.
 - Improve the availability of high speed broadband connectivity through working in partnership with providers and ensuring new development is 'broadband ready'.
 - Maintain the labour supply with appropriate skills and 'work readiness'. The level of housing proposed broadly maintains the labour supply at 2011 levels although there is a slight decline related to an ageing population. The impacts of changes to statutory pension and retirement will however mean more people are expected to continue working later in life in future. The full impacts of this will need to continue to be monitored.
 - Invest in our town centres which appear vibrant but our 'high streets' will face challenges over the coming years due to changing shopping patterns and competition from other expanding centres.

- Promote a successful visitor economy which benefits visitors and local communities alike whilst protecting and enhancing the attractive environment of the District – itself a key economic asset.
 - Support a vibrant rural economy through encouraging homeworking and flexible working practices, small rural business premises and enabling land based sectors to diversify.
26. To implement these strategic recommendations will require close working between a range of organisations, notably in relation to broadband provision and improving transport. Local Plan policies on the provision of land for business and policy approaches to the rural economy, tourism and retail development are also key influences.
27. The previous Economy Study 2007 assessed potential options for the provision of more land for business (mainly offices, industry and warehousing) and concluded that a ‘Steady Growth’ scenario was the preferred option which was subsequently supported through consultation. Although this growth scenario was conceived before the onset of recession it was proposed to cover a 20 year period in which time both periods of downturn and recovery would be expected. The scenario was based on longer term past trends of delivery of business development but the level of growth adopted was discounted to account for the restructuring of the economy. The Steady Growth scenario is considered to remain a robust forecast and market views in this update have also highlighted the need for continued provision of land for business.
28. Over the period of the Draft Local Plan 2011-2029, the Steady Growth scenario involves provision of 60ha of land for business. Approximately 26ha of land is identified through existing planning permissions and remaining adopted local plan allocations. In addition there is a current planning application for a further 10ha of employment land to be provided to the west of Witney on the adopted Local Plan reserve site. The total land provision identified is therefore 36ha of which there is approximately 20ha at Witney, 5ha at Carterton (although a further 2.5ha of vacant premises remain), 5ha at Chipping Norton and 5ha in the rural areas within existing commitments of which 2ha of land remaining allocated at Lakeside Standlake.
29. In the past a significant amount (approx 25%) of employment land supply has come forward through the expansion of existing business sites and new business sites in towns and villages. It is proposed that these policies continue and as such the full requirement of land for business does not need to be allocated. Whilst economic conditions remain uncertain it is considered prudent to continue to monitor and manage further provision of employment land making further land allocations as required.
30. Whilst there is a continuing need for the provision of development land and modern business units, the employment land audit identified that existing employment sites are well used and well distributed throughout the area. They are an important part of the supply of premises and it is considered that planning policies should continue to retain such sites where there remains a reasonable prospect of ongoing business use.
31. Land for business is one aspect of the proposed approach to planning for sustainable economic growth. In addition, policy approaches are recommended

to support the rural economy through a positive approach to home working and flexible working practices, the re-use of rural buildings (maintaining a preference for economic uses), farm and country estate diversification, sustainable tourism and resisting the loss of local services and community facilities. A separate [Retail Assessment Update November 2012](#) considers the District's town centres and potential for further shopping development and is available on the Council's website.

32. Overall the strategy provides potential for up to 10,000 jobs whilst broadly maintaining the labour supply at 2011 levels and as such provides significant potential to improve the balance of labour and jobs. This will need to continue to be monitored and meeting the objective of reduced commuting will be achieved through a combination of factors – increasing the number of local job opportunities available by increasing the supply of high quality business land, supporting home working, improved broadband and rural business opportunities.

I. INTRODUCTION

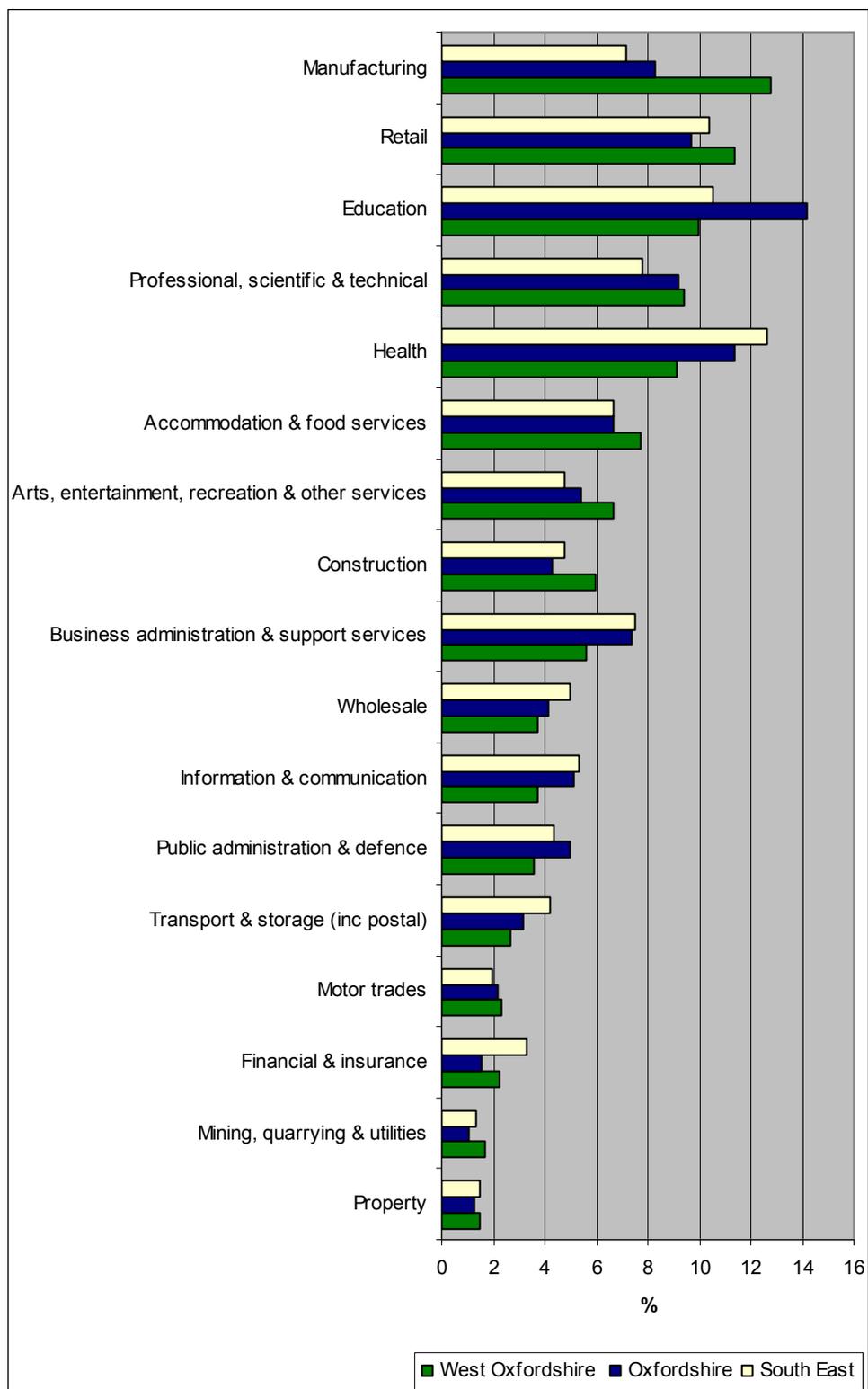
- 1.1. The West Oxfordshire Economy Study (incorporating an employment land review) was published in 2007 and is a key part of the evidence base in the development of the Draft Local Plan (formerly known as the Draft Core Strategy). At the time the study was prepared, the onset of the recession in the wider economy was not foreseen.
- 1.2. This document provides an update to the Economy Study where new data and information is available to inform the development of the Draft Local Plan. It has been prepared by Council Officers from the Planning Policy Team and follows the same structure of the previous study, providing an update where possible. The two documents should therefore be read alongside each other.
- 1.3. The national planning policy context has evolved since 2007 in response to the challenges still apparent in the wider economy. In 2011 a Ministerial Statement on Planning for Growth was published highlighting the Government's priority in reforming the planning system to promote sustainable economic growth and jobs. In March 2012 the Government published the National Planning Policy Framework (NPPF) condensing a raft of national planning policy into a single document.
- 1.4. The NPPF identifies that local planning authorities should plan proactively to meet the development needs of business and the economy and seek to address barriers to investment, whether with regard to the environment, infrastructure or housing. In drawing up local development plans the NPPF requirements¹ can be summarised briefly as to:
 - Set out a clear economic vision and strategy
 - Set criteria or identify sites to meet needs over the plan period
 - Support existing sectors
 - Plan for clusters and networks of high technology industry
 - Identify areas for regeneration or infrastructure provision or environmental enhancement
 - Facilitate flexible working practices
- 1.5. With regard to the evidence base needed to support local plans, the NPPF states that LPAs should work with neighbouring authorities and Local Enterprise Partnerships to understand business needs and work closely with businesses (including the food industry) to assess needs for land or floorspace. This document includes the relevant evidence to enable the requirements of the NPPF to be reflected in Local Plan policy.
- 1.6. Town centres as a location for shopping, business, and leisure are also a key part of the local economy. Whilst considered in this report, a further study, the West Oxfordshire Retail Needs Assessment Update 2012, considers this aspect of development in further detail and is available to view separately.

¹ NPPF paras 20-22

2. ECONOMIC CONTEXT

Local Business Activity

Chart I Percentage of employee jobs by sector



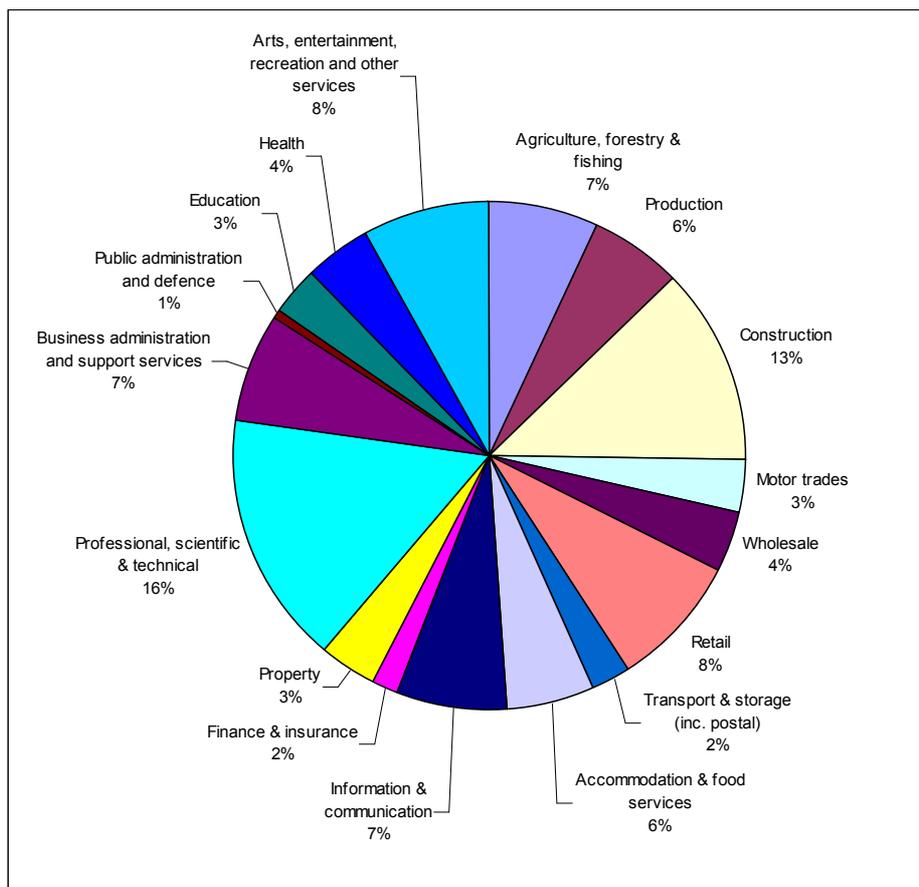
Source: ONS Business register and employment survey 2010
 Data excludes employment in Agriculture.

- 2.1. The most recent data indicates that there were 49,000 jobs in total in West Oxfordshire, a jobs density of 0.75² indicating that the number of jobs represents three quarters of the total number of people aged 16-74. Data on the proportions of business units by sector indicates that there were almost 5,900 local business units³ in West Oxfordshire, the smallest number of Oxfordshire District's.
- 2.2. In terms of employee jobs, Chart 1 indicates that West Oxfordshire's top five employer sectors are:
 - Manufacturing
 - Retail
 - Education
 - Professional, scientific and technical industries
 - Health
- 2.3. Accommodation and food and arts, recreation and other services are also significant sectors linked to the District's strengths in tourist and visitor economy.
- 2.4. Health and education are also significant sectors of employment although proportionately not as significant as in Oxfordshire in general. Relatively fewer people are employed in sectors such as Finance and Insurance and Business administration and support services and Information and Communications. The proportion of employment in public administration and defence is not as high as in Oxfordshire or the South East in general.
- 2.5. In contrast to the proportion of employment in different sectors, the proportion of businesses by sector is more similar to the County and regional averages. Chart 2 however highlights that whilst professional, scientific and technical, retail, arts and entertainment sectors continue to be the more significant sectors, business services and construction are more significant and manufacturing (production), education and health are less significant in terms of numbers of business units. This perhaps reflects the fact that for manufacturing for example there are more larger businesses/employers in this sector whereas for construction and business services there are more smaller businesses with fewer employees in the area.
- 2.6. Data on the size of local businesses (Chart 3) highlights that over 70% of businesses employ less than 5 people. This is a slightly higher proportion than the County and regional averages and the District has few larger businesses.

² Jobs Density (2010) www.nomisweb.co.uk

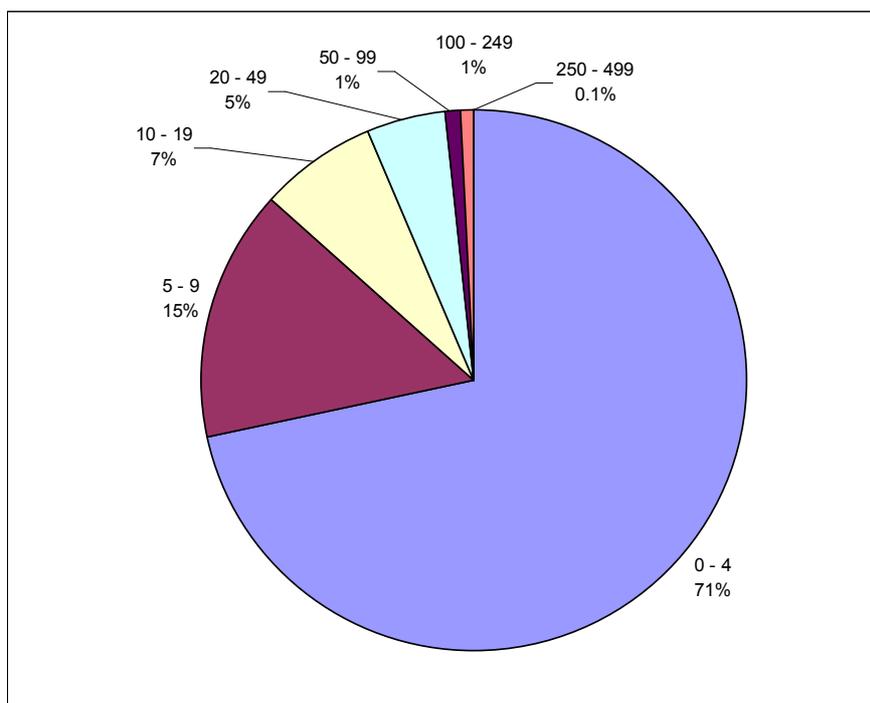
³ ONS 2011 – Data from the Inter Departmental Business Register (IDBR) which records VAT trader and PAYE registered enterprises. A local unit represents an individual site/factory or shop and as such one business may have several local units in the area.

Chart 2 Proportion of Local Business Units by Sector 2011



Source: ONS UK BUSINESS: ACTIVITY, SIZE AND LOCATION - 2011

Chart 3 Proportion of Local Business Units by Number of Employees 2011



Source: ONS UK BUSINESS: ACTIVITY, SIZE AND LOCATION - 2011

- 2.7. Data on the formation and survival of new businesses⁴ indicates that the number of businesses grew by around 3.5% between 2005 and 2010, although a lower growth rate than the South East (3.9%) and County (4.9%) averages.
- 2.8. Whilst new business growth appears reasonable, the survival of new businesses is good in West Oxfordshire with 65% surviving for 5 years compared to 55% across Oxfordshire and 47% in the South East.

Key Business and Employment Sectors

- 2.9. The following map and business references seek to illustrate the key business sectors in the District.

Scientific, Technical and Manufacturing Industries

- 2.10. Some businesses within West Oxfordshire form part of the Oxfordshire Bioscience Network (OBN) and part of the Oxford Bioscience cluster⁵. This includes:
- Abbott Diabetes Care, Witney (drug discovery and development)
 - Gateway Pharma (drug discovery and development support services)
 - Owen Mumford, Chipping Norton and Woodstock (medical technology)
 - Eden Research (green biotechnology)
 - Microscope Services (laboratory supplies)
 - Diligent Business Consulting and Fry Heath Spence Patent Attorneys (business service providers)
- 2.11. The OBN Biocluster Report indicates consistent growth in this sector, with the rate of business start ups and spin outs appearing unaffected by the recession. The rate of relocations and new branches, however, has reduced which may be related to the supply of property and also the perceived expense of relocation during a financing drought. The prospects for the bioscience industry around Oxford are noted as being very positive with the diversity of companies and products in the BioCluster larger than ever with investment flowing following a slow down during the recession.
- 2.12. Other technical industries include **Siemens Magnet Technology, Eynsham**, the production facility for the superconducting magnets for all Siemens magnetic resonance imaging (MRI) scanners worldwide.
- 2.13. The District has a history of motorsport with the two FI technical development facilities in the District. The **Lotus FI Team** is based at the Whiteways Technical Centre, near Enstone, which is the main design, manufacture, assembly and testing facility for chassis and aerodynamics. The

⁴ ONS Business Demography 2005-2010

⁵ For a full list see the OBN Biocluster Map 2011 -

http://www.obn.org.uk/seeb/images/publications/OBN_BioCluster_Report_2011_for_web.pdf

Caterham FI Team have moved into the Leafield Technical Centre formerly used by Super Aguri and Arrows.

Map 1 West Oxfordshire Economic Assets



- 2.14. The District has a long history with manufacturing formerly in the wool and blanket trades. Manufacturing retains a significant presence including businesses in the construction, furniture, equipment, chemicals and other sectors.
- 2.15. **Stewart Milne** in Witney are a leading privately owned house-building and construction business who specialise in timber-framed construction solutions. They have a production facility in West Witney. **Wesley Barrel**, in Witney and Ducklington, are a leading manufacturer of classic and high quality furniture. **Corndell, Furniture Company Limited**, in Witney is considered one of the largest independent furniture designers and manufacturers in the country. **JSP Limited**, Worsham are manufacturers and worldwide distributors of personal protective equipment. **Lansdowne Chemicals**, Carterton are at the forefront of global chemicals manufacture for Nutrition, Aroma and Water Treatment.

Military and Defence

- 2.16. **RAF Brize Norton**, located adjacent to Carterton, is a major employer which employs around 6,000 military personnel. It is the largest strategic air transport base in Country. With the arrival of aircraft relocated from RAF Lyneham, the number of personnel increased but may then decline subject to Defence reviews. The base also supports around 600 civilian contractors.
- 2.17. **Airtanker** are based at RAF Brize Norton and is a consortium of aerospace companies that provides the aviation support services for the aircraft that will replace the existing tanker / transport fleet. The company provides the aircraft, training, maintenance and management of aircraft for the RAF air-to-air refuelling. A number of civilian contractors are also employed by **Serco** who are involved in servicing the base.
- 2.18. A recent report investigated the economic impact of military presence in Oxfordshire and Hampshire⁶ and highlighted the significance of military jobs in the District notably the spending power of personnel. It was noted that many MOD contracts are centralised and taken by national or international companies with a concern that whilst such contractors may create jobs locally many purchase inputs nationally in order to receive economies of scale and so the use of local products is not necessarily encouraged or favoured. The MOD however consider that local Small and Medium Sized Enterprises (SMEs) can tap into MOD contracting opportunities as subcontractors.
- 2.19. The availability of highly skilled personnel leaving the RAF is also significant and it was indicated that RAF personnel are more likely to buy into the local private housing market whilst in the RAF and remain in the area afterwards. There is no indication however that they are any more or less likely to start their own business.

⁶ The Economic Significance of Military Activity in Oxfordshire and Hampshire, SQW Sept 2011

Tourism and the Visitor Economy

- 2.20. The District has a number of visitor attractions including the River Thames on the southern boundary, and attractive market towns, villages and countryside including within the Cotswolds AONB. There are also specific visitor attractions such as Blenheim Palace (World Heritage Site) and the Cotswold Wildlife Park.
- 2.21. Tourism and the visitor economy remains an important sector, with total local business turnover from tourist activity estimated at over £255m in 2010, a rise of 11% over 2008⁷. The tourism strategy for the District, promoted as the Oxfordshire Cotswolds brand, aims to persuade visitors to stay longer and spend more, in addition to attracting more visitors.

Retail

- 2.22. Indications are that the retail sector is fairing relatively well. The District's town centres are relatively vibrant with low vacancy rates. Recent investment has occurred in Witney with the Marriott's Walk development attracting key anchor stores including M&S and Debenhams. The Woogate Centre has also been extended to accommodate Next and H&M. Aldi has recently opened in Carterton and a Morrison's foodstore is planned in the town centre. In Chipping Norton the Co-op plan to extend their foodstore and the Beales department store whilst providing additional car parking.
- 2.23. Continued investment in town centres is required as they will continue to face challenges from the internet and other competing centres such as Oxford. Further information on our town centres and retail trends is available in the separate Retail Assessment Update 2012.

Rural Economy

- 2.24. Employment in agriculture has declined and is only 2% of employee jobs. However, the total farmed area has increased, contrary to the national picture and it is still an important sector economically and for landscape management. There are a number of large estates in the District, such as Blenheim, Cornbury, Ditchley and Heythrop. Such estates manage a variety of natural, historic and cultural assets of importance locally, nationally and internationally often in addition to farm enterprises, business premises and visitor facilities.
- 2.25. Otherwise in rural areas⁸ the types of businesses are similar to those in urban areas, with a high proportion of service based activities⁹. Businesses in rural areas tend to be smaller and there is more home-working and self employment. Many former agricultural buildings have been successfully converted into attractive business premises in our rural areas such as Manor

⁷ Tourism South East Research Services, The economic impact of tourism, West Oxfordshire 2010

⁸ Using standard rural-urban definitions the rural area includes all of the District excluding Witney and Carterton

⁹ Understanding Rural Oxfordshire –The Rural economy, Oxfordshire Economic Observatory 2007

Farm Barns, Finstock, Court Farm Tackley, and The Cowsheds, Blenheim. These premises provide a home for a range of businesses including media related, IT and other business services.

Table I Defra Survey of Agriculture and Horticulture

	2010	2007-2010 % Change	
	West Oxfordshire	West Oxfordshire	England
Number of holdings	431	-	-
Total Farmed Area (ha)	60 364	5	-4
Cereals (ha)	20896	7	4
Arable (ha)	11704	21	9
Fruit and vegetables (ha)	22	-12	-2
Grassland (ha)	20994	16	-4
Cattle	14048	-6	-1
Sheep	54439	10	-8
Pigs	8461	-56	-9
Poultry	408186	-47	-3
Total Labour	1 065	-10	-5

The local labour market

2.26. The first of the Census 2011 results have now been issued including headline District population figures. West Oxfordshire is estimated to have had a population of 104,800 in 2011, an increase of almost 10% since 2001.

2.27. In common with Oxfordshire in general, West Oxfordshire has an ageing population with those over 75yrs increasing by 24% from 2001 to 2011 compared to those aged 0-9 yrs increasing by 2% and those 25-64 yrs by 7%.

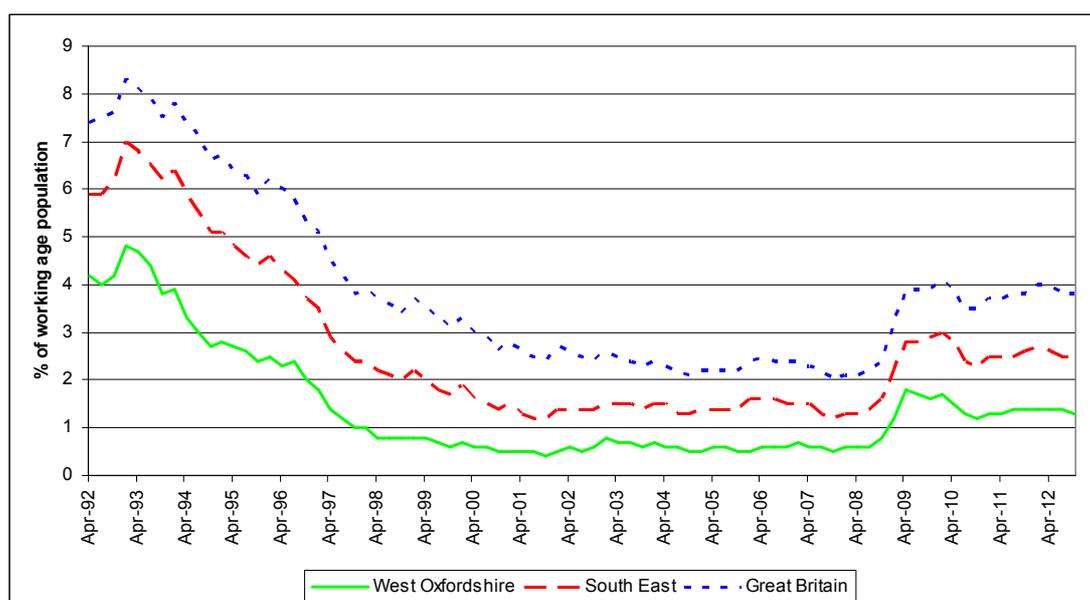
2.28. West Oxfordshire has the second highest employment rate of Districts in the South East at 81.6%¹⁰. This is the proportion of working age people in employment. The District also has fifth highest economic activity rate of District's in the South East at 84.6%. This is the proportion of working age people available for work. Both the employment rate and economic activity rate are significantly above national and regional averages.

2.29. Unemployment is correspondingly low. The unemployment claimant count¹¹ at July 2012 stood at 1.4% significantly lower than the regional and national averages (2.5% and 3.8% respectively). The rate remains considerably higher than 2008 when the proportion of the working age population claiming JSA fell to 0.6%.

¹⁰ ONS Annual population Survey April 2011 to March 2012 - proportion of working age (16-64)

¹¹ Defined as the proportion of working age people claiming Job Seekers Allowance

Chart 4 Unemployment JSA claimants since 1992

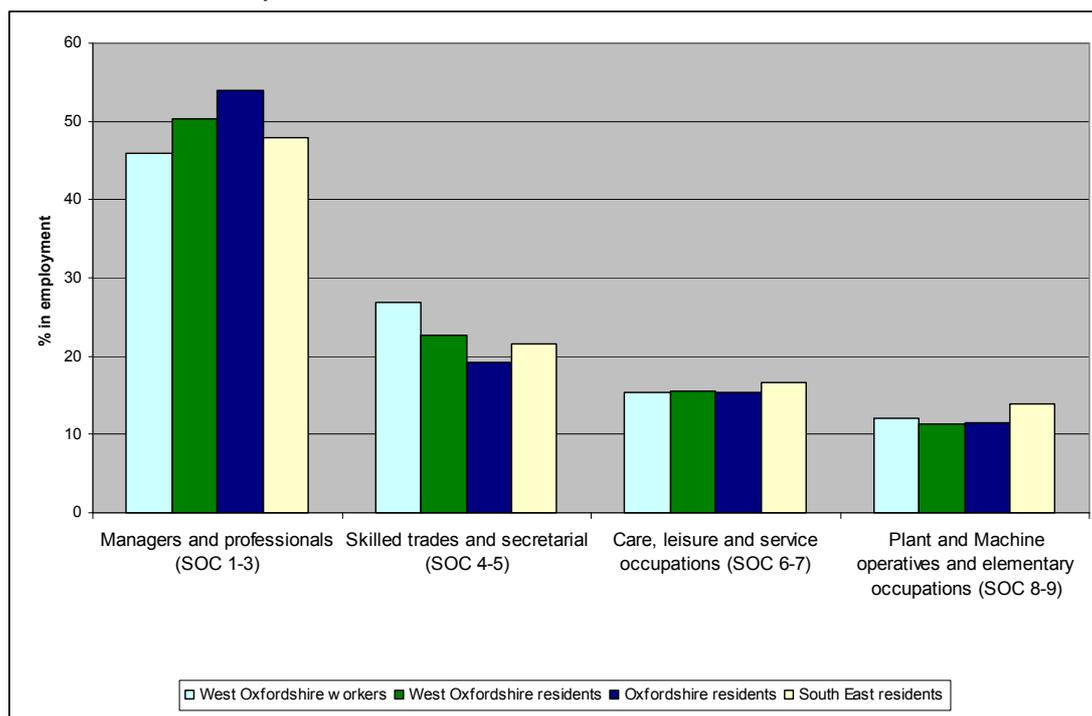


- 2.30. The claimant count only records those claiming unemployment benefits. It is expected that actual unemployment is generally higher. Modelled unemployment rates stand at 3.9% of the economically active working age population which is significantly lower than the south east (5.9%) and Great Britain (8.1%).
- 2.31. West Oxfordshire has a reasonably well qualified workforce with 36.6% of workers qualified to degree level (NVQ4 and above)¹² just above the South East average (36.2%) and national average (32.9%). This is however relatively low in the Oxfordshire context compared to Oxford (53.6%), Vale of White Horse (44.0%) and South Oxfordshire (38.1%).
- 2.32. The relatively high level of qualifications is reflected in the occupation of the workforce. However, Chart 5 below also indicates that more managers and professionals leave the District to work as there are more residents with managerial and professional occupations than those who work in the District.
- 2.33. This is further reflected in the average wages of those 'working in' compared to living in West Oxfordshire. The average wage for those living in the District, at £484 per week¹³, is lower than for those living in the District, at £546. Weekly pay for residents is above the national average (£503) but below the South East average £554. West Oxfordshire workers' pay is below both the regional and national average.

¹² ONS Annual population Survey Jan 2010 to Dec 2010 - proportion of working age (16-64)

¹³ ONS annual survey of hours and earnings (2011) Gross weekly full time median earnings

Chart 5 Broad occupation of residents and workforce



Source: ONS Annual population Survey April 2011 to March 2012

2.34. The ratio of lower quartile house prices to lower quartile earnings in 2011 was 9.8¹⁴ – indicating that lower quartile house prices were almost 10 times higher than lower quartile earnings. The disparity between earnings and house prices has increased since 2006, indicating that house price increases have outstripped wage increases in the District. High house prices combined with lower wages can make staff recruitment and retention difficult.

Oxfordshire Employer Skills Study

2.35. An Oxfordshire Employer Skills survey in 2010 of almost 1,300 businesses across Oxfordshire was undertaken by Step Ahead Research Ltd for the Oxfordshire Economic Partnership (OEP) and Oxford Brookes University. The survey included around 200 businesses in West Oxfordshire and was a repeat of a previous survey in 2008 allowing some comparators to be drawn.

2.36. The 2010 survey identified that 90% of businesses in West Oxfordshire were satisfied with the area as a business base, up slightly since 2008 (86%). Furthermore 27% of businesses expected staff numbers to grow. Since 2008 the percentage of employers who had taken on new staff in the previous 12 months had increased slightly (2%) in West Oxfordshire compared to a fall across Oxfordshire as a whole of 6%.

¹⁴ Table 576 Ratio of lower quartile house price to lower quartile earnings by district. www.communities.gov.uk

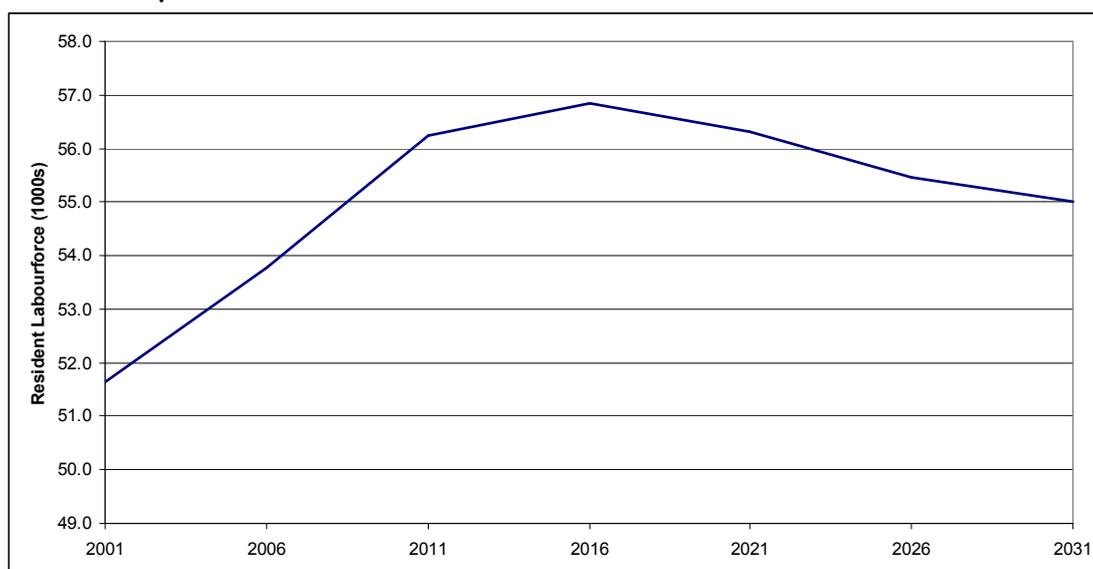
- 2.37. The proportion of employers reporting problems with recruitment increased in West Oxfordshire from 43% in 2008 to 45% in 2010, whereas across Oxfordshire it had decreased from 48-39%. The increase in West Oxfordshire however related to employers reporting a problem for certain roles with those reporting a significant problem decreasing slightly.
- 2.38. Across Oxfordshire recruitment difficulties are most likely to relate to higher skilled occupational groups particularly professionals or technical and skilled occupations. This was a similar position to 2008 and was also broadly in line with the national picture, although the recruitment of professionals and highly skilled specialists was seen as more of an issue within Oxfordshire in 2010 than at the national level (25% compared with 12%). Reflecting this, the 2010 survey also suggested recruitment difficulties are a particular issue in the manufacturing sector (reported by 60% of employers, compared with 39% of all employers) and among employers engaged in science & technology activities (58%). The ageing profile of workers with some specialist skills also appears to be an issue for some employers, especially in engineering and healthcare.
- 2.39. The dominant reason for recruitment difficulties was a lack of applicants with the required skills and this issue was more common in Oxfordshire than nationally and in neighbouring areas with similar economies such as Berkshire and Surrey. At the same time it was noted that many employers feel education leavers know little about opportunities in their sector and make poor learning choices as a result. Employers also want education to do more about improving the attitudes and behaviours associated with 'work readiness'.
- 2.40. Around one in five (21%) West Oxfordshire employers were identified as having skills gaps - having staff they do not consider to be fully proficient in their role. This was similar to the County and regional average and whilst up from 12% in 2008, reflected regional trends. Such skills gaps may reflect perceptions of motivation rather than specific skill sets.

Labourforce Projections

- 2.41. Recent population projections based on rolling forward the South East Plan housing targets¹⁵ forecast that the number of workers in the District is set to increase to 2016 but then decline to 2031. Overall the projections indicate, between 2016-2031, a net decline in the labour force of 1,800, a decline of just over 3%.

¹⁵ SE Plan Housing based West Oxfordshire Demographic Projections September 2012, John Hollis

Chart 6 Projected West Oxfordshire Labourforce



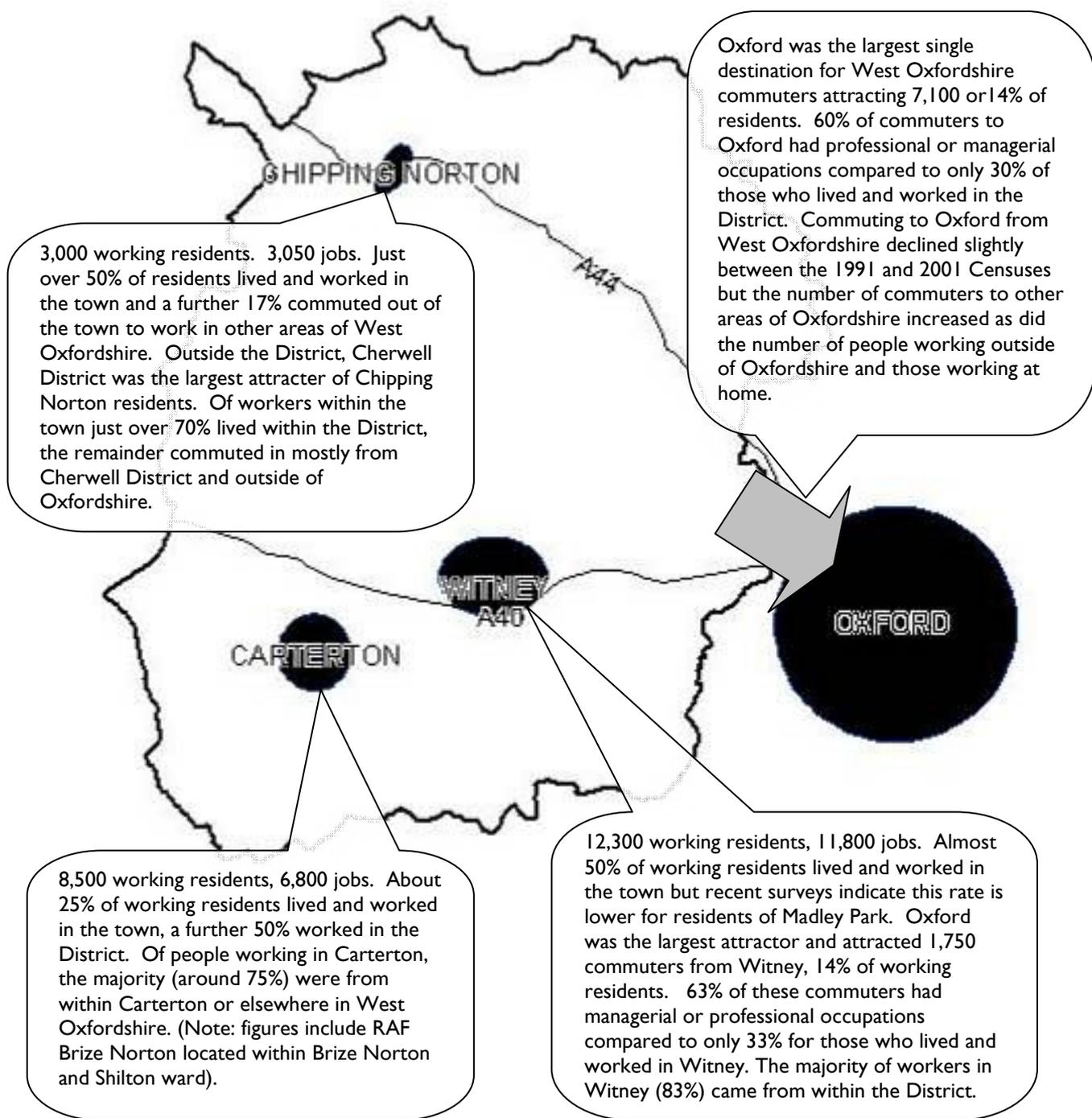
Projections take into account first 2011 Census release and reflect South East Plan housing targets

- 2.42. The resident labourforce reflects the age and gender structure of the population. These demographic factors are the most significant factor as to the future labourforce as more people in the future are expected to enter older age groups for which labour participation is lower than average.
- 2.43. There are other factors also which affect economic activity rates (availability for work). These include factors such as increased provision of childcare increasing activity rates of women of child bearing age, and changes to pensionable ages and pension schemes. Economic activity rates are also affected by cyclical economic factors and as such during an upturn in the economy, economic activity rates increase.
- 2.44. The September 2012 labourforce projections are based on 2001 Census Economic Activity rates for West Oxfordshire and the 2006 ONS projection of economic activity rates for Great Britain up to 2020¹⁶ and held constant then to 2031. The 2006 ONS projections assumed the following changes to economic activity to 2020:
- Falling economic activity of young men and women (16-24yrs) mainly due to increasing participation in further and higher education
 - Falling economic activity of prime age men (25-49yrs) but at a lower rate than previous decades and attributed to the declining number of jobs in manufacturing and the administration of Jobseekers Allowance and Incapacity benefit both introduced in the mid 1990s
 - Increasing economic activity rates of prime age women (25-49yrs) relating to changes in attitudes towards the employment of women and improvements in the provision of childcare as well as changes in family structure

¹⁶ ONS Projections of the UK Labourforce 2006 to 2026, January 2006

- Increasing activity of older men (50-64yrs) reflecting the increasing role older people are expected to play in the labour market in the future but the economic activity of men over 65yrs not expected to increase
 - Increasing activity of women aged 60 and over, particularly noting the increase in pension age from 60-65yrs between 2010 and 2020
 - No forecast was made of future economic conditions and in effect this factor was excluded
- 2.45. ONS have announced they will no longer be publishing projections of the national labourforce and the last estimates were those of January 2006 noted above. Since these projections there have been changes which will affect the labourforce projection:
- Acceleration of increases in the State Pension Age for women to 65 by 2018
 - Increasing the State Pension Age for men and women to 66 by 2020
 - Increasing the State Pension Age for men and women to 67 by 2036 and 68 by 2046 although it is anticipated these rises may also be brought forward
 - Phasing out of the default retirement age such that employers cannot dismiss staff because they reach 65
- 2.46. These changes indicate that there is likely to be an increase in the economic activity rate of older people as some *choose* to continue to work as they are fit and active and/or are incentivised by delaying their pension to receive a higher level of payment later on and some who *have* to continue to work due to insufficient savings. Many may reduce their hours rather than cease working altogether.
- 2.47. These changes are most likely to affect the 65-69 age range which by 2031 is projected to be around 7,500 residents in West Oxfordshire and based on rolling forward the South East Plan housing targets. The potential increase in workforce due to recent pension and retirement changes is not therefore likely to be significant but may contribute to balancing the projected labourforce decline.
- 2.48. In addition, Census 2001 commuting data identifies significant out-commuting of workers from the District, of 18,000 workers (gross). Whilst other economic centres such as Oxford will continue to attract West Oxfordshire workers, the ageing of the population with more older workers and a potential increase in part time work may mean more workers seek to reduce commuting and work more locally or from home. This has the potential to claw back some out-commuters and increase further the labourforce beyond that projected.
- 2.49. Current information on commuting patterns is drawn from the 2001 Census and as such is now somewhat dated. Future Census 2011 data releases will help confirm current commuting flows and the potential for the 'claw back' of out-commuters.

Chart 7 West Oxfordshire 2001 Census Commuting Summary



Notes:

In 2001, 10,300 people commuted into the District and 18,100 commuted out of the District. 64% of working residents lived and worked in the District a similar proportion to 1991.

Equivalent data from the 2011 Census is not expected until after October 2013

Infrastructure and Communications

- 2.50. The transport infrastructure within West Oxfordshire has been highlighted as a key issue which impacts upon the local economy with congestion on major inter-urban routes and within the main towns. Public transport infrastructure is limited primarily to bus services which are also impacted by congestion on major routes.
- 2.51. Since the Economy Study, the compulsory purchase order needed for the proposed Cogges Link Road, a scheme to relieve congestion within central areas of Witney, was rejected by a Government Inspector and the District Council is currently investigating the alternatives with a new all movements junction onto the A40 at Downs Road and the provision of west facing slip roads at Shores Green identified as the preferred option in the Draft Local Plan.
- 2.52. The proposed A40/Downs Road junction which will be delivered through the strategic allocation of land at West Witney, is identified as a significant investment to enable further employment and other development to occur to the west of Witney. The construction of west facing slip roads at Shores Green, in conjunction with the Downs Road junction is expected to encourage traffic to use the A40 instead of travelling through the centre of Witney thereby helping to relieve congestion.
- 2.53. Proposals to improve the performance of the highway network on the edge of Oxford are also being investigated and have the potential to reduce congestion on major routes into the City (A40, A44) and improve connections to the A34.
- 2.54. Improvements to the Cotswold Railway Line have recently been completed. The provision of additional track will help to improve the reliability of services on this route which passes through the rural area of the District connecting Cotswold towns and villages with Oxford, London, Hereford and Worcester. There are also proposals to provide additional car parking at Long Hanborough Station which will improve the accessibility of the Cotswold Line services to commuters.
- 2.55. Whilst these improvements will have positive benefits, they do not significantly alter the economic role of the District. West Oxfordshire will continue to function within the wider sub-regional economy, with commuters attracted to regional centres such as Oxford and Swindon, and congestion on major inter-urban routes. Significant further investment in the transport infrastructure is likely to be limited to developer funded, localised improvements.
- 2.56. The District has good broadband coverage but the availability of high speed, next generation broadband is more limited and there is likely to be market failure in its provision in the rural areas in the future.
- 2.57. This is one of the key work areas of the Oxfordshire Local Enterprise Partnership (see below) who have secured £3.86 million from BDUK to provide faster broadband speeds in rural areas up to 2015 on completion of an

agreed Local Broadband Plan. Oxfordshire County Council have agreed to match fund the money from BDUK and also make an additional £6.14m available to perform upgrades on the Oxfordshire Community Network broadband network for schools in the county. There is also potential funding from DEFRA's Rural Community Broadband fund.

Summary

- West Oxfordshire has a relatively diverse economy with businesses spread throughout the main towns and rural areas. The area has a long history associated with manufacturing (e.g. Blankets) and engineering (Smiths Industries) but is diverse with key business sectors including:
 - **Manufacturing, Scientific and Technical Industries** – including high quality furniture (Wesley Barrel), safety equipment (JSP), timber frame construction (Stewart Milne), Motorsport (Lotus FI and Caterham), Medical equipment (Siemens, Abbot Diabetes, Owen Mumford), Engineering (ICE Oxford Cryogenics)
 - **Retail** – the area's town centres are generally vibrant with low vacancies but West Oxfordshire's 'High Streets' will face challenges due to the growth in online retailing and development in competing centres such as Oxford.
 - **Tourism** – a growing sector estimated to be worth £255m to the local economy, reflecting the area's attractive environment, Cotswold towns and villages, River Thames and attractions such as Blenheim Palace and the Cotswold Wildlife Park.
 - **Military Aviation** – RAF Brize Norton is located adjacent to Carterton and is the largest strategic air transport base in the country employing some 6000 personnel. Other businesses such as the AirTanker aerospace consortium and Serco are also engaged in the activity of the base.
 - **Rural economy** – whilst employment in agriculture is small (2%) and declining in line with the national trend, it remains an important sector for the management of West Oxfordshire's attractive countryside and rural communities. Otherwise businesses in rural areas are engaged in similar sectors to those in urban areas although tend to be smaller and there is more home working and self employment. High speed broadband is a particular requirement facilitating their success.
- Small businesses are a key component of the local economy with 70% of the total number of businesses in the District employing less than 5 people. New business growth is reasonable but business survival is above average.
- Businesses in the District are part of the **Oxford Bioscience Cluster** particularly the manufacturing of medical devices but also including diagnostics, laboratory supplies and other support services.

Labour

- The area has very high economic activity (84.6%) and employment rates (81.6%) with correspondingly low unemployment (1.4%). The qualification level is good with above average numbers qualified to degree level and this is reflected in residents' occupations. Many professionals and managers however commute out of the area and the average wage for workers in the area is lower than the average wage for residents. House prices are high and lower quartile house prices almost 10 times lower quartile earnings.
- More businesses in West Oxfordshire reported recruitment difficulties in 2012 compared to 2008 whilst Oxfordshire wide, recruitment difficulties are a particular problem in the manufacturing, science and technology sectors. This relates both to a lack of applicants and also a requirement for workers with technical skills with employers seeking improved 'work readiness' from school leavers.
- Labour force projections indicate that the labour force is expected to increase to 2016 but then begin a slow decline which is linked to an ageing population and fewer workers per household in the future.
- Past Census data has indicated that significant numbers of workers (18,000) left the District to work although the net outflow of workers is less (8,000) – new 2011 Census data is still awaited. There is potential to claw back commuters particularly if the older working population seeks to reduce commuting, hours or increases self employment and homeworking.

Infrastructure and Communications

- Transport infrastructure is a key issue which impacts on the local economy – including congestion on major routes such as the A40 but also within the main towns such as Witney and Chipping Norton. There are views in the commercial property market that traffic congestion deters businesses from locating in the area. There are plans to improve movement in Witney, including new road connections to the A40 in the east and west.
- Rail services have recently been improved along the Cotswold Line but do not link the main towns. Parking for commuters is an issue but there are plans to improve this at Charlbury and Long Hanborough.
- The availability of high speed broadband is more limited and there is likely to be a market failure in its roll out to rural areas which will need to be addressed.

3. EMPLOYMENT LAND AUDIT 2012

- 3.1. This audit updates the Employment Land Audit 2007 and presents an overview of the amount and type of employment land and premises in the District. It considers the existing stock of employment land and allocated sites for B class uses, i.e. land utilised for industrial uses, offices and warehousing. The audit takes into account the ODPM (2004) guidance on Employment Land Reviews and has been prepared in conformity with the requirements of the National Planning Policy Framework.
- 3.2. The sites considered in the audit were mostly identified from the previous audit published in 2007 where a site threshold of 0.25ha was used. In addition smaller employment sites which are considered to be significant in their context were also identified (i.e. small estates of employment units in small villages and the open countryside). Data on each site was collected from the Council's GIS database and through site visits between June and September 2012. Maps and a list of sites considered are presented in Appendix 5.
- 3.3. The following sections set out a summary of the key points apparent from the audit.

Witney

- 3.4. The majority of the stock of employment premises are industrial and are concentrated in two main areas: Station Lane on the southern edge of Witney and the Downs Road/Range Road Area to the West of Witney. These areas provide units of a range of sizes and quality as well as development opportunities.
- 3.5. The Downs Road area incorporates some ageing industrial premises associated with the area's long history in manufacturing (aeronautical engineering and Smiths Industries in particular). Some of these larger manufacturing units have been subdivided and refurbished and most are in good use.
- 3.6. The Downs Road area is also the focus for new employment development with large scale bespoke manufacturing premises constructed on land allocated in successive local plans (including for Abbott Diabetes Care, Oxford Products and Stewart Milne Timber). The allocation of land for employment purposes in this area has also attracted distribution uses (Chris Hayter), the development of small estates of smaller industrial/warehouse units (Nimrod, De Havilland Way and the Glenmore Business Centre) and also a small estate of small office premises (Witney Office Village, Network Point). Vacancy rates in this area are typically low although there are a limited number of smaller office and light industrial units to let on the Glenmore Business Centre and Range Court.
- 3.7. Station Lane is a large employment area immediately to the south of the town adjoining the A40 the majority of which was developed in the 1970s. The estate offers mostly industrial/warehouse premises of varying sizes including several estates of small leasehold premises.

- 3.8. Although there are a number of vacant premises in the Station Lane area that are either for sale or to let, the estate remains well occupied. Business start up accommodation is offered in the Hexagon Business Centre, and small office accommodation in Two Rivers Estate along the Station Lane frontage. Several non-B type uses also occupy units on the estate including flooring showrooms and golf sales and sales of bulky goods such as furniture, kitchens and bathrooms and trade counters.
- 3.9. There are relatively few other large employment sites elsewhere in the town. Those that exist include the Eagle Industrial Estate, West End Industrial Estate, and to the rear of Newland/Oxford Hill. These provide lower specification older industrial units on small estates.
- 3.10. There are few large office premises within the town or on the larger estates on the periphery of the town. The majority of the office stock is small and medium sized. The Witan Way/Station Lane frontage provides a focus for much of the modern office stock including Des Roches Square and Waterside Court and also the Two Rivers Industrial Estate. Just across from Station Lane is the Thorney Leys Industrial Estate which also provides modern office units of different sizes but typically small units. Meadow Court offers some small office units close to the town centre and is currently well occupied. Compton Way provides small offices units and was part of a larger mixed use development. An exception is Spinners Court which offers very small offices in converted mill buildings. There is currently some evidence of marketing on the site with at least 6 of the 22 office units on site to let. There are also a range of office premises available above shops in the central area of the town.
- 3.11. Since the 2007 audit the Buttercross Works on the northern side of Station Lane, opposite the main Station Lane Industrial Estate has been approved for the development of 185 dwellings, including extra care housing. In addition a site of older offices at Woodstock Road has been redeveloped for older persons housing.
- 3.12. Although there are evidently a number of vacancies on existing employment sites in Witney, none have a level of vacancy which indicates they are not suitable to meet local business needs and as such the audit did not identify a need to release any sites for other uses.
- 3.13. The West Oxfordshire Local Plan 2011 was adopted in June 2006. The following table identifies sites specifically allocated in the adopted Local Plan 2011 for employment uses and provides an update as to their uptake.
- 3.14. Although approximately 11ha remained to be developed to the west of Witney approx 4ha of this land was subject to developer interest/under construction. As such remaining available, developable employment land is approximately 7ha. An application has been submitted to develop the Local Plan reserve allocation at North Curbridge (West Witney) to include 10ha of employment land. The application is as yet undecided.

Table 2 Local Plan Employment Land Allocations Update - Witney

Local Plan Employment Allocation	Total area allocated in Local Plan 2011	Status at October 2012
East of Downs Road East, Witney	10ha	At the time of the audit approximately 7ha of the current Downs Road East allocation remained undeveloped, although the majority (4ha) of this now has developer interest. The Council has recently resolved to grant permission for a new HQ offices and manufacturing facility for Owen Mumford on 3ha of the site. Oxford Motor Products are expanding into a 1ha plot adjacent to there current premises.
West of Downs Road West, Witney	2.3ha	2.3ha remains allocated without permission. This land is in multiple ownership which has delayed it coming forward for development. Access is proposed from the south past the Stewart Milne production facility.
North Curbridge Development Area (Proposal 8) reserve site	-	A planning application has been submitted for the development of land to the West of Witney, including up to 1,000 dwellings, an employment area of 10ha and a new junction between the A40 and Downs Road. A mix of employment uses will be promoted to encourage high technology manufacturing as well as light and general industry and some storage and distribution. There is a working assumption that B8 uses (storage and distribution) will not exceed 25% of the total land area.

Carterton

- 3.15. Carterton South is the main established employment area in Carterton other than RAF Brize Norton. This site provides generally older 1960s - 1970s lower specification industrial premises the majority of which are larger detached premises but there are also smaller terraced units at Clare Terrace and Bell Terrace. This site adjoins the RAF Brize Norton airbase. Carterton South Industrial Estate comprises mainly industrial engineering uses including chemical manufacture, steel manufacture, vehicle repair and salvage operations. The majority of the site is well occupied although there are currently some vacant industrial units and storage space available to let. A previous permission for the erection of additional business units on vacant plots (0.5ha) in the northwest corner of this site has now lapsed but development potential remains.
- 3.16. On the eastern side of Carterton, the West Oxfordshire Industrial Park comprises a collection of older, small industrial units which remain well occupied with 2 of the 8 units on site vacant at the time of the employment audit. The industrial estate now forms part of the West Oxfordshire Business and Retail Park (8ha) allocated through earlier Local Plans. Various business/warehouse and non-food retail units have been constructed on the site but most remain unoccupied. The site also includes a petrol filling station and children's nursery. A new office building is being constructed. Permission was recently refused for the development of a foodstore on site. Approximately 4ha of the site remains undeveloped but is well located to meet future employment development needs. Land and premises on the site have typically been offered on a leasehold basis.
- 3.17. Ventura Park lies opposite the West Oxfordshire Business Park, located to the north of Monahan Way. This 4ha site has been offered on a freehold basis and has seen steady take up. This includes two office buildings, Zinc and Wesley House formerly occupied by Air Tanker, the latter of which provides start up office units and both have seen steady take up. There are also several contractor and vehicle hire yards and an estate of small to medium sized warehouse and light industrial units (3000-5000sqft). Unfortunately most of these units remain vacant as they were built speculatively and may either be too large to meet the general demand in the town for smaller units or too small to attract a significant employer to the town. There is approximately 1ha of vacant development land spread over several plots one of which has permission for an office building.
- 3.18. Carterton's employment land supply remains concentrated into two main areas south and east of the town. Both areas remain good quality employment sites well located to continue to meet employment land needs. In total there remains approximately 5ha of development land although there is approximately a further 2.5ha of land with vacant premises.

Chipping Norton

- 3.19. Chipping Norton has a range of employment sites offering a variety of types and quality of premises from small high quality office premises at Cromwell

Park, larger industrial units at Station Road, to small modern light industrial premises at the Worcester Road estate which is well occupied.

- 3.20. Owen Mumford is the town's largest employer and occupies a large medical device manufacturing unit on the Primsdown Industrial Estate which was extended in 2007 and is being extended again. This is due to be complete in December 2012 .
- 3.21. The Elmsfield and Greystones Estates also offer industrial space but these estates are more remote from the town and offer small lower specification older units. The Elmsfield site was however fully occupied at the time of the audit while the Greystones site is currently subject to a planning application to convert part of the site to a recycling centre.
- 3.22. Development opportunities remain at Cromwell Park where one plot is still undeveloped (0.1ha). The former highways depot adjacent to Cromwell Park (0.9ha) is yet to be developed but part of this allocation has outstanding outline permission (0.5ha). Land off the London Road adjoining Cromwell Park is allocated for mixed use and includes a new town hospital and care home. A planning application for a new primary health care centre and pharmacy has recently been submitted. Excluding the area subject to this recent application, approximately 2ha of this site remains with potential for employment uses.
- 3.23. On an adjacent site off the London Road the former Parker Knoll Factory was redeveloped for housing with 2ha of the site retained for employment (B1) uses. The employment land remains undeveloped although permissions for business units on the site have been granted. An application for a Sainsbury's foodstore on the site was recently refused.
- 3.24. Existing employment sites in Chipping Norton are typically well occupied, particularly the industrial estates and there appears to be a lack of good quality small industrial units. There is a total of approximately 5ha of potential development land for business development in Chipping Norton.

Elsewhere/rural areas

- 3.25. There is a scattering of sites throughout the rural areas of the District providing a mix of types, sizes and quality of units. Several of the larger villages have employment areas offering mostly industrial space within or on the edge of the village. These include Stanton Harcourt Industrial Estate, Oakfield industrial Estate at Eynsham and a small estate at Groves Timber Yard in Milton Under Wychwood.
- 3.26. There are larger estates which are in the open countryside and more remote from residential areas such as Crawley Mill, Enstone Airfield, and Lakeside Estate near Standlake.
- 3.27. There are several large single user employment sites scattered throughout the rural area. Examples include purpose built facilities for Siemens Magnet Technology near Eynsham, Lotus FI near Enstone, Caterham FI near Leafield,

Owen Mumford at Green Lane Woodstock and JSP Protective Equipment at Worsham Mill.

- 3.28. There are few purpose built estates of small industrial units outside of the larger villages. Examples include Wroslyn Road at Freeland and Viscount Court adjacent the Brize Norton airfield. The Viscount Court site is fully occupied and is currently being extended to provide an additional 3 industrial units.
- 3.29. The majority of the stock provides industrial and warehouse space but along with the scattering of small office courtyards there are also purpose built office parks within the Woodstock – Witney – Eynsham triangle. These include North Leigh Business Park, Blenheim Office Park in Long Hanborough (near Woodstock) and the Oasis Business Park at Eynsham. The Long Hanborough Business Park (which adjoins the Blenheim Office Park) is a mixed employment area but with a significant office component and some high-tech operations. A small area of development land remains within the office park.
- 3.30. There are many small employment sites which have resulted from the conversion of vernacular agricultural buildings. Several examples of which incorporate small office courtyards of high quality and in attractive settings spread throughout the small villages and the open countryside. Examples include Southill Business Park and Manor Park Barns on the Cornbury Estate, Worton Park near Cassington, Gate Farm at Kiddington, the Quadrangle at Woodstock, The Old Brewery at Burford, and Court Farm Barns at Tackley. These small sites appear well used by a range of business and professional services and high technology firms.
- 3.31. Other small sites exist which also occupy converted agricultural or mill buildings but several offering lower specification small industrial and warehouse units. Examples include New Yatt Business Park, Mount Farm at Churchill, Little Clanfield Mill, and Church Farm at Northmoor. Vacancy rates on these sites appear to be slightly higher but not to the extent that such employment sites have become redundant.
- 3.32. Only one site is allocated for employment development outside of Witney, Chipping Norton or Carterton- the (1.9ha) extension to Lakeside Industrial Estate in Standlake which remains undeveloped. The site does not have any residential uses nearby and direct access to the A415. It is allocated for B2, B8 and similar 'bad neighbour' uses.

Summary

- 3.33. The 2012 Employment Land Audit indicates limited changes to the stock of employment premises since the 2007 audit which indicated a good range of sites in terms of quality, type and distribution. The key changes appear to be:
- A limited number of sites have been lost to residential uses – Buttercross Works and Woodstock Road sites in Witney and Spareacre Lane Eynsham has permission for residential.

- Most of the sites are fully developed and vacancy is low. Several sites had some vacancy but none to the extent that it would indicate the sites had become unviable and should be considered for other uses.
- Further take up of allocated employment land west of Witney with limited land now remaining without developer interest (7ha)
- Further take up of previously allocated land east of Carterton although slower and approximately 5ha of development land remains in addition to vacant buildings.
- Significant expansion of Owen Mumford at Chipping Norton but approximately 5ha of development land remains to the east of the town
- Allocated land at Lakeside, Standlake (1.9ha) remains undeveloped

3.34. In 2007 much of the stock was noted as ageing and of average quality by national standards. There is evidence of some refurbishment and new development of premises, mainly in Witney and Carterton. The remaining allocated sites are all of good quality and likely to come forward for development.

4. COMMERCIAL PROPERTY MARKET

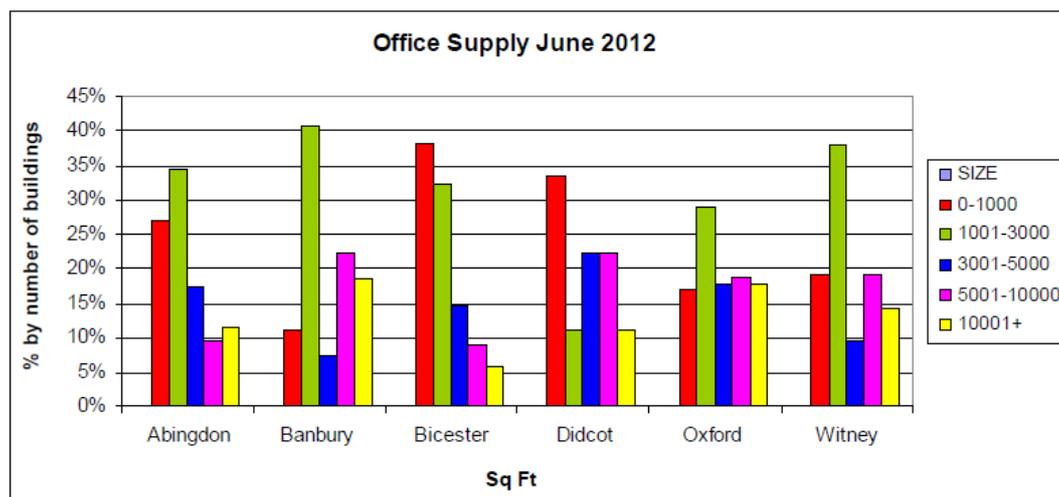
- 4.1. The District Council publishes a monthly Property Register detailing the availability of land and premises for rent or sale within the District.¹⁷ The information is collated with the assistance of property agents and landowners. It is a snapshot of the availability of premises. The register as at August 2012 has been analysed to give an illustration of available commercial property by broad type of unit (office or industrial/warehouse), size of unit and location.
- 4.2. This analysis of the property register is supplemented with the views of various property agents active in the area and which were sought through telephone conversations during September 2012. The comments made and the views are not attributed to any particular one of the agents contacted. The agents included:
- Meeson Williams
 - VSL and Partners
 - Carter Jonas
 - Wilsons Commercial
 - Benedicts

General market views - Oxfordshire

- 4.3. Meeson Williams publish market reviews on their website and the latest Second Quarter Review 2012 identifies that across Oxfordshire, experience is that there has not been a slow down in activity and instead there has been a continual trend in businesses from professional services, manufacturing and scientific/R&D sectors planning relocation. Recently there has been a noticeable trend in demand for smaller unit sizes in both industrial and office sectors. These views were reiterated by the other agents.
- 4.4. Size availability of offices appears to be matching demand although there has been more take up of larger offices and as such the proportion of supply of smaller units has increased.
- 4.5. For industrial units there appears to be more of an imbalance between supply by location and size with virtually no nursery units (up to 1,500sqft) available and supply concentrated in larger units.
- 4.6. There were consistent views among agents that a key issue at present is the lack of banks lending to enable businesses to expand or relocate but also limiting the development of speculative new units. This also particularly affects the supply of small industrial units noting they are relatively more costly to build. The lack of new units is potentially limiting businesses in the local area although it is noted that, whilst Local Plans can allocate land for new business units, the lack of banks lending remains a constraint on their supply.

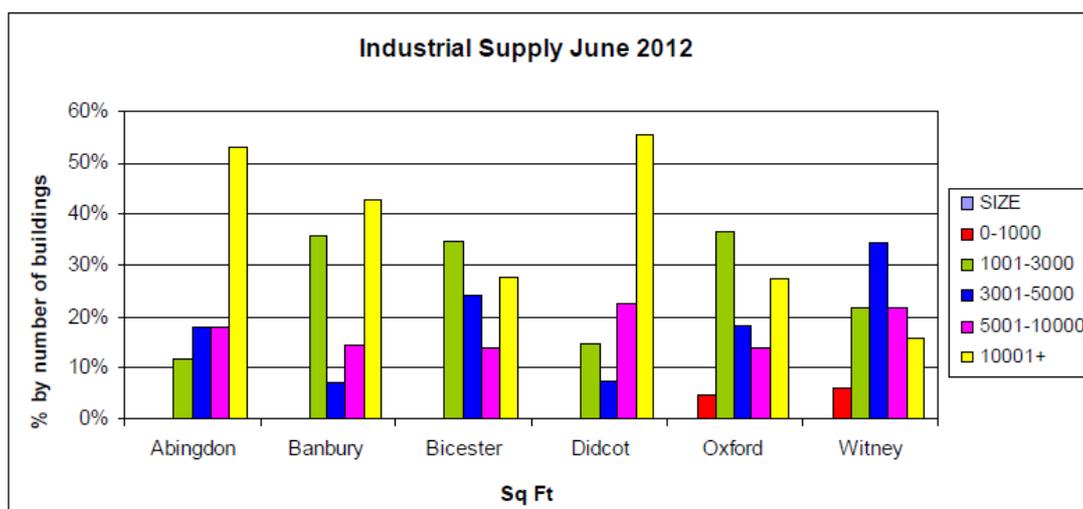
¹⁷ <http://www.westoxon.gov.uk/business/LandandPremises.cfm>

Chart 8 Meeson Williams Second Quarter Review 2012 Office Supply



Source: www.meesonwilliams.com

Chart 9 Meeson Williams Second Quarter Review 2012 Industrial Supply



- 4.7. With investor confidence low, empty property business rates were a further factor highlighted as contributing to the lack of speculative supply.
- 4.8. The main area of activity in Oxfordshire is noted as along the A34 corridor where transport accessibility is much better notably Milton Park and Harwell (Science Vale) and Banbury and Bicester. These latter towns were noted as being more industry/production based with notable concentrations of motorsport and logistics. There were differing views on the ability of Bicester to diversify its economy further and attract spin off Bio-tech businesses from Oxford. Kidlington, Milton Park and Harwell were identified as having more potential in this regard.
- 4.9. Oxford was highlighted as more office based and being relatively short of development land whereas Bicester and Science Vale is likely to be well served

by land in the future. These areas were not however considered likely to pull businesses out of West Oxfordshire and there were views that the Enterprise Zone is likely to have limited impact with this area already an established business location.

General market views - West Oxfordshire

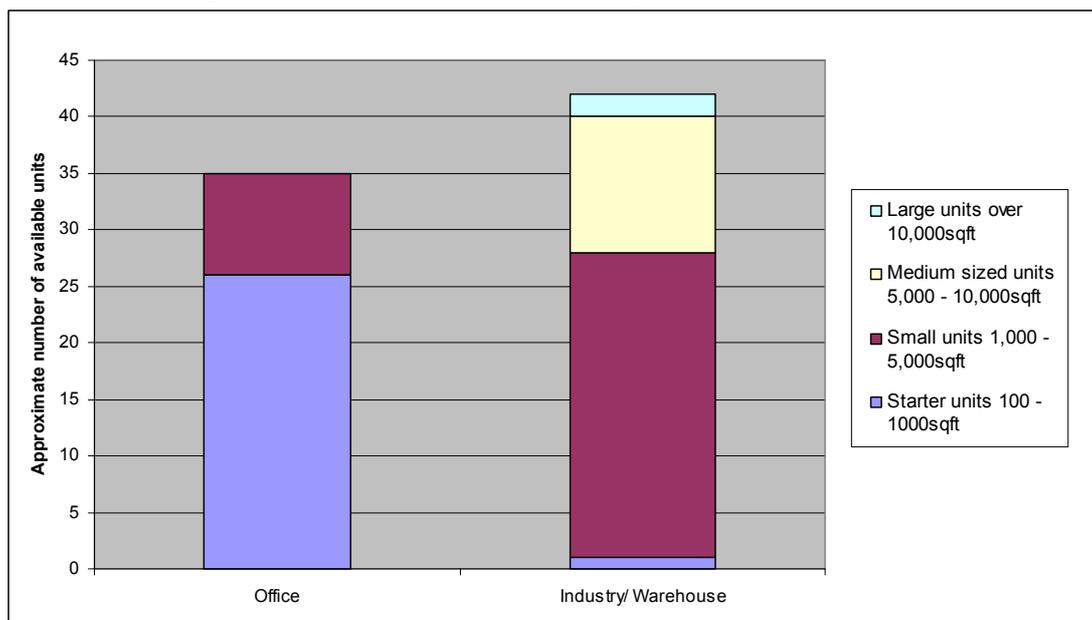
- 4.10. Demand for property in West Oxfordshire is noted as being more limited than for other areas of Oxfordshire and with more of an industrial focus.
- 4.11. The main strengths of the area were noted as an attractive place to live with vibrant towns (and as such that many MDs reside in the area). The area has a history in engineering with a skilled labour base which is relatively immovable (e.g. F1 motorsport is a global business but there is a concentration of businesses in the area).
- 4.12. It was considered that West Oxfordshire is likely to have limited success in significantly developing further the biotechnology industry in the District but is likely to have more success on the engineering and manufacturing side which also need a base. Although some companies manufacture overseas (e.g. China) they retain a base here to conduct R&D (e.g. Airdri at Eynsham).
- 4.13. The key weakness of the area is transport congestion, particularly the A40. High speed broadband was also highlighted as very important and particularly for the office market, more rural areas and barn conversions and to support homeworking. Some also noted staffing issues and the need to rationalise the stock of employment premises. Some older premises are no longer meeting business needs and really struggling to let with particular locations noted including at Station Lane and also Wroslyn Road Freeland.
- 4.14. The prospects for refurbishing premises were also considered to be economically questionable in the currently economic climate. Premises in prominent and accessible locations such as Station Lane, Witney may have more potential for refurbishment to trade counters. There were views that, where vacant for sometime, premises should be considered for other uses.
- 4.15. Aside from addressing the transport constraints which would improve conditions for businesses and commuters alike, it was considered that a strong marketing campaign as well as the availability of serviced land with planning permission will help the area continue to compete within the Oxfordshire context. It was noted that many businesses in the area are smaller and more reactive to their circumstances and as such often do not have long lead in times to secure new premises.
- 4.16. Business relocations into West Oxfordshire have typically come from the east and out of Oxford because the area is more cost effective and is considered likely to remain so. Limited movement of businesses was noted from the west and Swindon as these areas also tend to be more cost effective again. Other areas to the east are also noted as more cost effective again with an oversupply of premises in the High Wycombe area reducing rents/costs considerably.

- 4.17. However, the majority view was that current demand for premises was typically from businesses already local to the area rather than footloose businesses. Some specifically attributed the lower demand for premises in West Oxfordshire and lack of inward investors to congestion on the A40. There was however a general view that businesses already in the area would stay, largely due to the relative immovability of staff and financial constraints at the current time.
- 4.18. No major gaps in the supply of premises were identified although neither was there considered to be a major oversupply of premises. There was a general view that quality accommodation was in short supply and particularly small industrial premises.
- 4.19. Approximately 200 vacant premises were being marketed by commercial agents according to the August 2012 commercial property register spread throughout the area and of various types and sizes. The number of units identified is approximate as often several available properties are registered under one listing and some floorspace values are not presented in the register. Retail units have not been included in the data charts.

Witney

- 4.20. Agents considered Witney was the main location of demand in West Oxfordshire. The following chart gives an approximate breakdown of available commercial property in Witney from the property register. As the largest town in West Oxfordshire with the largest industrial parks, Witney also has the highest number of available premises.

Chart 10 Witney Vacant Commercial Premises (August 2012)



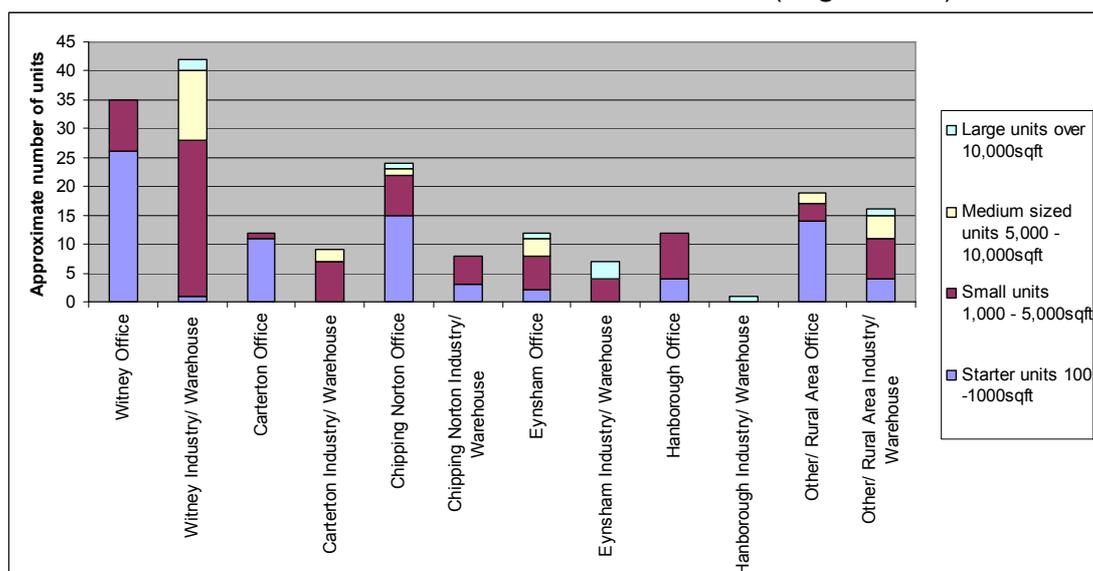
Note: Includes available premises at Crawley Mill

- 4.21. The property register indicates a reasonable supply and availability of small starter office units (around 25) in Witney (100-1000sqft or 1 to 15 people). These are located within the town centre in period buildings, but also in small business centres such as Spinners Court, West End and the Two Rivers Business Estate at Station Lane, where the Hexagon Business Centre is located. These units are mainly serviced offices, offered on a flexible 'easy in, easy out' basis and often referred to as incubator units. Further supply of such premises is planned to open shortly at Witney Business and Innovation Centre located on the Windrush Industrial Estate to the West of Witney. The centre will be run by Oxford Innovation and will offer a range of office sizes, virtual¹⁸ and shared offices and meeting rooms in a serviced environment. Agents noted that the demand for serviced office units was noted as high but supply of such space reasonable also.
- 4.22. The property register identified a limited supply of small offices (1000-5000sqft) available at Bridge Street Mills and Church Green and small purpose built offices at Thorney Leys Business Park and the Witney Office Village and Nimrod developments to the west of Witney. Small to medium sized town centre offices (1000-3000sqft, similar to Des Roche Square) were also noted as being most in demand by agents but availability of premises limited.
- 4.23. The availability of medium sized/larger offices appears very limited with only one office unit over 4,000sqft at Des Roches Square, Witan Way, and marketed as a prominent headquarters building. Available office premises are all offered on a leasehold basis.
- 4.24. In terms of industrial/workshop premises the register indicates there is a reasonable supply of small industrial and storage units (around 25) in a variety of locations and sizes between 1,000sqft 5,000sqft. This includes units at Minster Industrial Park, Windrush Park, Glenmore Business Centre and the Bromag Industrial Estate to the west of Witney, the Station Lane Industrial Estate and also at Crawley Mill. These units are within more established older employment areas with few units in more recently built industrial parks but does include some refurbished units. These units are predominantly offered to rent although a limited number of freehold units are offered at Station Lane, Windrush Park and Range Road.
- 4.25. Agents noted that the Oxfordshire wide demand for modern small industrial units is reflected in Witney with a lack of supply of modern premises (1000-2500sqft).
- 4.26. The register indicates a more limited supply (around 10) of medium sized industrial /warehouse units being available, again at Range Road, Windrush Park and Station Lane but also at Bridge Street Mills. These are again mainly offered to rent with a few freehold opportunities in the Windrush Park area.

¹⁸ Virtual offices provide a business telephone answering service and business postal address giving a more established impression for home based businesses

- 4.27. There are even fewer larger industrial units available over 10,000sqft with only two noted on the register at Station Lane including a 13,500sqft business unit (production/office) and a 20,000sqft warehouse unit, both to rent.
- 4.28. Potential freehold development plots marketed include a former depot at Oxford Hill Witney (1 acre) and a development plot to the west of Witney at Downs Road for up to 200,000sqft of B class floorspace.
- 4.29. Agents highlighted that larger industrial units are in demand (10000-20000sqft) with very little supply remaining in Witney and development land running out also.
- 4.30. There were views that significant relocations such as Abbott Diabetes are to some extent one offs and given the more locally generated demand for premises and limited inward investment, the proposed land allocation of 10ha at West Witney is likely to meet needs for the next 10-15yrs. The last adopted Local Plan allocations at Range Road were made in the mid 1990s and are just about filling up. It was considered that this gives something of a guide to future needs and timescales.

Chart 11 West Oxfordshire Vacant Commercial Premises (August 2012)



Carterton

- 4.31. In Carterton the register indicates a reasonable supply of (around 10) small starter office suites (from 100sqft or 1 person upwards) available to rent at Ventura Park including at Wesley House and at Carterton Business Centre in the Zinc Building. Only one small office unit was noted elsewhere in Carterton, an office and stores at Clare Terrace, Carterton South Industrial Estate. There were no medium sized or larger office units on the register in Carterton.
- 4.32. There are a reasonable number of small industrial units available at Carterton (around 10) including at Carterton South Industrial Estate and recently

developed units at Ventura Park and West Oxfordshire Business Park mostly around 3,000 – 5,000sqft.

- 4.33. Units at Ventura Park are offered as freehold or leasehold with several noted as being under offer. Elsewhere units are offered to rent. There is a limited supply of medium sized units over 5000sqft again at West Oxfordshire Business Park and Ventura Park.
- 4.34. The register also identifies available serviced yards at Carterton South Industrial Estate, various retail units at West Oxfordshire Business Park and freehold design and build opportunities for up to 15,000sqft of floorspace at Ventura Park.
- 4.35. The market for premises in Carterton was noted by agents as generally slow and to some extent related to the availability of premises at Witney which is considered a more attractive location. Carterton is typically seen as more of an industrial market although modern small offices at Ventura Park have seen reasonable demand/take up.
- 4.36. It was noted that the take up of freehold plots had been successful but the take up of speculative industrial units less so with indications that units built (3000-5000sqft) did not quite meet market demand which is for smaller units in this location (1500-2500sqft). There were suggestions that the lack of take up at West Oxon Business Park reflects tenure and pricing issues.
- 4.37. There are views that Carterton is an expanding market with demand for this area increasing and positive views on the take up of remaining land including some aircraft related users. Reflecting this, some considered the availability of development land (5ha) and available units reasonable to cater for the next 10-15yrs. However, should one or two larger aircraft related uses locate in this area, the land supply would be used up quickly, with others considering the area likely to need more land which may help stimulate the market further and act as competition to West Oxon Business Park.

Chipping Norton

- 4.38. The property register identifies a good supply of small serviced starter office units (around 15) in Chipping Norton both within the town centre, at the Stonehouse Business Centre and Monksdene, New Street and also at Cromwell Office Park in the east of the town.
- 4.39. Small offices are also available to rent at the Elmsfield Industrial Estate and at Cromwell Park, with some freehold opportunities also available at the latter.
- 4.40. Although not within Chipping Norton, a new development of courtyard offices is being marketed on a freehold or leasehold basis at Kingham Station (9000 and 24000sqft).
- 4.41. In terms of industrial/warehouse premises, there is a much more limited supply of mainly small units to rent in Chipping Norton. This includes units at

Elmsfield Industrial Estate and Worcester Road Trading Estate. There are also workshop units available at Langston Priory and Mount Farm Churchill. The District Council is currently considering a recycling depot at the Greystones estate which may further reduce the availability of industrial units.

- 4.42. Agents identified a limited market for premises in Chipping Norton and typically demand is locally generated. Offices were considered relatively well supplied with Cromwell Park taking 20yrs to fill up. However, a limited land release to facilitate more good quality small industrial units was highlighted as these have typically done well.

Elsewhere/Rural Areas

- 4.43. The property register identifies a supply of office space available in Eynsham within the village at Elm Place, on the western edge and at Oasis Park and the Oakfield Industrial Estate on the southern edge of the village. This includes small flexible offices on an 'easy in, easy out' basis and some freehold premises available at Elm Place. Medium/large offices are also available to rent at Oasis Park and Oakfield Industrial Estate (5000-15000sqft).
- 4.44. There are fewer industrial units available in the Eynsham area with a few small leasehold and freehold units being marketed at the Oakfield Industrial Estate and a small number of larger units including a 1ha self contained complex.
- 4.45. There is available office space at Long Hanborough including managed offices on short or longer term leases available at Wychwood House, Hanborough Business Park (around 100sqft, 1-2 people). There are also small offices to rent and freehold opportunities at Blenheim Office Park and Hanborough Business Park, including newly built and self contained premises.
- 4.46. In terms of the industrial space the register identified one large business premises (offices, production and storage space) to let at Hanborough Business Park (17,000sqft)
- 4.47. In the rest of the District and rural areas, a limited amount of office space is being marketed to rent and principally small units under 1000sqft at: Bampton Business Centre; Filkins; Tannery Yard, Burford; Southill Business Park, Cornbury Park; Hill Farm Barn and Alfred Grove and Sons Business Centre, Milton under Wychwood; Wychwood Business Centre, Shipton under Wychwood, Little Clanfield.
- 4.48. Only a couple of medium sized offices were being marketed, at North Leigh Business Centre, Bampton Business Centre, and a also couple of barn conversions to offices at Ditchley Park and Wootton.
- 4.49. There is also a relatively limited amount of industrial units being marketed in the rest of the District and again mainly smaller workshop units at locations such as Clanfield, Radford Farm Barns, Aston, Northmoor and Threshers Yard, Kingham.

- 4.50. A small number of medium sized units are being marketed to rent at the Wroslyn Road Estate in Freeland, Lakeside Industrial Estate, Standlake, Broughton Poggs Business Park, Bampton Business Centre and Enstone Business Park (Enstone Airfield). A couple of these at Standlake and Broughton Poggs are offered freehold. Only one larger industrial unit (23,000sqft) was being marketed at Broughton Poggs.
- 4.51. Agents indicated that the level of supply of office premises appears sufficient at present although some difficulty is being experienced in letting units at Eynsham. Demand for industrial premises is more patchy e.g. could let industrial units in Eynsham but some older estates such as Wroslyn Road, Freeland are struggling to let.
- 4.52. A limited continuing supply of barn conversions was also considered to be needed. Such premises were highlighted as more lifestyle choice related and tend to be more popular with media related businesses and during economic upturns. During downturns businesses move towards town centre premises.
- 4.53. High speed broadband connectivity was noted as a significant factor to the occupation of these premises as was accessibility to major transport links (e.g. A40) and local amenities. More remote barns were noted as having much more limited potential for business use and should be considered for holiday lets or housing instead.
- 4.54. There were mixed views on the demand for land at Lakeside, Standlake with some noting very limited demand for this area whereas others highlighted that the previous scheme of small industrial units let well, has good road access and considered the right location for dirty industrial type uses that would be less appropriate for a business park.

Summary

- Demand for premises in West Oxfordshire was considered lower than for other areas of Oxfordshire (e.g. Bicester, Milton Park and Harwell), with most interest geared towards industrial type premises and mostly locally generated. Some market views attributed the relative lack of inward investment enquiries to transport constraints with areas of more demand being on the A34 corridor.
- No major gaps were identified in the supply of premises overall although market views considered that quality accommodation and particularly small industrial units were in short supply as are larger industrial units in Witney. There has been limited investment in new property over the last 5 years particularly on land allocated for employment uses on the edge of Witney and Carterton. The ageing of the stock is highlighted as an issue and the economics of refurbishing premises or new build (particularly speculatively) are difficult because of a lack of banks lending.
- Witney is seen as the main location of demand for good quality small to medium sized office units with incubator office space provision increasing recently to meet demand. Small and larger industrial units are also in demand

but with limited supply and development land running out. The proposed additional 10ha of employment land at West Witney was considered by agents spoken to as being sufficient for the next 10-15yrs.

- Carterton is considered an area of more limited demand and more on the industrial side and for smaller premises. The area was however noted as an expanding market and although available land and premises was seen as adequate for the short to medium term, more land could be needed in the longer term should one or two aircraft related business choose to locate in the town.
- Chipping Norton was also identified as an area of more locally generated, limited demand and again more on the industrial side. Good quality small industrial units are typically well occupied with limited available supply. Design and build opportunities for offices and light industrial premises remain in the town.
- In other areas, the supply of office premises appears sufficient but in common with other areas there is stronger demand and limited supply of good quality small industrial premises. An ongoing but limited supply of barn conversions is considered appropriate and particularly in more accessible locations with high speed broadband connectivity

5. LOCAL ENTERPRISE PARTNERSHIP AND COMPETING AREAS

5.1. Chapter 6 of the Economy Study (2007) considers the economic role and future proposals of neighbouring Districts and the extent to which they compete with West Oxfordshire. Since the Economy Study was published, several of these Districts have progressed their future plans and the key strategic changes of relevance to West Oxfordshire are presented below.

Oxfordshire LEP

5.2. The Oxfordshire Local Enterprise Partnership (LEP) was launched in March 2011. The LEP is part of Government's Coalition Programme to promote local economic development to replace Regional Development Agencies (RDAs).

5.3. Oxfordshire's LEP proposal although noting the importance to support all economic sectors, focused on developing markets and creating private sector jobs in those sectors that have the greatest potential for growth and global competitiveness, specifically:

- Low carbon and green technologies
- Advanced materials and engineering
- Space and other high value R&D science based sectors (including health care, cryogenics, etc).

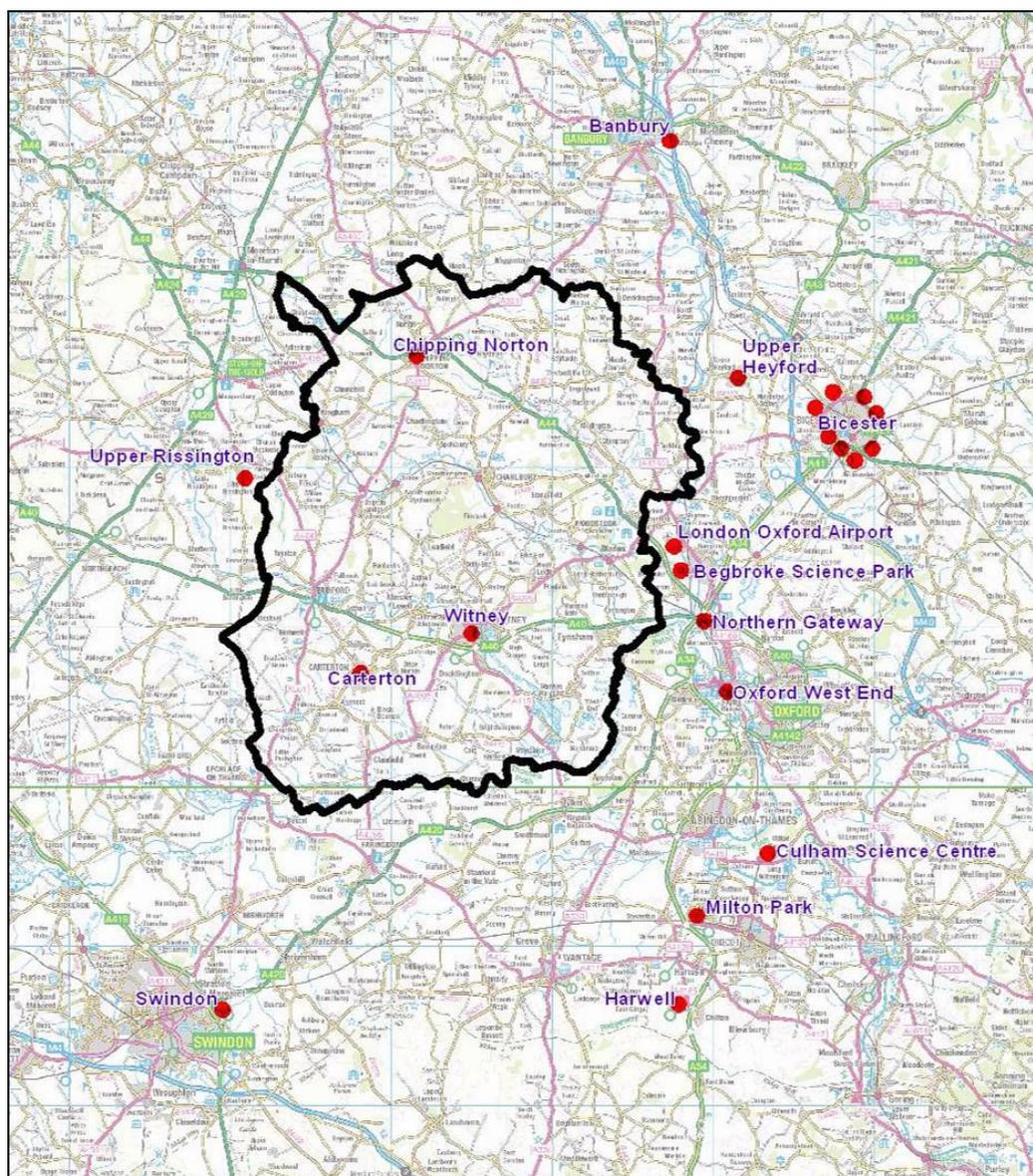
5.4. The Partnership's work in this regard is to be focused on three spatial priorities:

- Science Vale UK – where the ambition is to build on its designation as a national science and innovation campus and now also an Enterprise Zone;
- Eco-Bicester – where the ambition is to use the town's eco-designation to act as the focus for delivering an international exemplar of sustainable economic development;
- Oxford – where the ambition is to ensure continued investment in supporting the work that already makes this a world-class centre of education, research and innovation.

5.5. The prioritised programme of work for the Oxfordshire LEP includes:

- Improving the County's connections to fast broadband access
- Improving the skills and employability of those in and about to enter Oxfordshire's workforce
- Maximising Oxfordshire's potential to increase inward investment
- Enabling access to business support and business finance
- Enabling infrastructure needed for growth

Map 2 Key competing employment areas



Science Vale

- 5.6. The Abingdon – Didcot area is a particular focus for science and research known also as Science Vale¹⁹. The area includes two of the UK’s biggest science and research business parks - Harwell Oxford and Milton Park which are located in the Vale of White Horse District.
- 5.7. An Enterprise Zone has been designated in the area allowing businesses to take advantage of business rate discounts, small company R&D tax credits, simplified planning procedures and access to super-fast broadband, business advice and support.

¹⁹ <http://www.sciencevale.com/>

- 5.8. **Milton Park** is one of the largest business and science parks in Europe. It covers 100 hectares, has over 300,000 square metres of floor space and is the location for a cluster of knowledge based businesses employing more than 6,500 people.
- 5.9. **Harwell** Oxford hosts the Rutherford Appleton Laboratory, including the Diamond Light Source, and is one of the Government's two designated centres of science and knowledge transfer. In October 2010 it was confirmed by the Government as a location of continued investment to extend its reach into new research areas such as medical science and engineering materials.
- 5.10. Nearby, close to Abingdon, the redevelopment and intensification of **Culham Science Centre** is also proposed. The Culham Science Centre, covers some 80 hectares, and is the home of the UK's fusion research programme and the world's largest fusion experimental facility, JET (Joint European Torus). It is owned and managed by United Kingdom Atomic Energy Authority.
- 5.11. The Enterprise Zone bid envisaged 200,000 square metres of development delivered by the private sector by 2015. This is expected to bring in around 8,400 high-tech, high-value-adding jobs.
- 5.12. Science Vale attracts commuters from West Oxfordshire leading to congestion on the A415 between Witney and Abingdon.

Oxford

- 5.13. The Oxford Core Strategy has now been adopted and makes provision for in the range of 11,000-14,000 jobs up to 2026. Oxford has typically had more jobs than workers and significant numbers of West Oxfordshire residents commute into the City. The Oxford Core Strategy housing policies will result in a modest improvement to the imbalance between houses and jobs over the plan period.
- 5.14. The strategy includes an employment led strategic development area to the north of the city – the Northern Gateway. Reflecting Oxford's strengths as a centre of research and development, the Northern Gateway strategic allocation is primarily intended for office and research and development uses which seek to capitalise on the Oxford brand and proximity to the universities and hospitals.
- 5.15. The allocation seeks to deliver 55,000sqm of (primarily class B1) employment floorspace by 2026. The Northern Gateway development, lying between the A40 and A44 on the northern edge of Oxford, is likely to attract commuters from West Oxfordshire and is linked to highway improvements in this area as part of improving strategic highway access to Oxford.
- 5.16. Oxford City Council have also adopted the West End Area Action Plan to guide significant redevelopment and investment in the city centre. This includes up to 15,000sqm of additional office floorspace and the redevelopment of the

Westgate Shopping Centre to provide 34,000sqm of additional retail floorspace comprising 60 additional units. The Action Plan also focuses on improving visitor facilities in this area of the city centre including hotel accommodation and conference facilities.

Bicester, Banbury and Kidlington

5.17. Cherwell District Council have now published their Proposed Submission Local Plan (August 2012)²⁰. The plan focuses housing and business growth at Banbury and Bicester but also at RAF Upper Heyford. Both Banbury and Bicester have excellent transport links being located on the M40 and A34 as well as the west coast mainline. Reflecting such transport advantages, the area has a high proportion of employment in logistics, retail and industrial sectors. Whilst supporting the logistics sector Cherwell District seeks to change the structure of its economy by attracting employment in:

- Advanced manufacturing/high performance engineering
- Green economy
- Innovation, research and development
- Retailing
- Consumer services

Eco-Bicester

5.18. Bicester in particular is identified as a location of significant housing and employment growth. In July 2009 the Government confirmed North West Bicester as the location of one of the new eco-town locations. The eco-town proposal incorporates provision for 5000 new homes over the lifetime of the development (1,800 by 2031). The strategy seeks to secure at least one job per home and a concept study in 2009 estimated that approximately 32 hectares (9% of the total area of the development) would need to be set aside as employment areas.

5.19. Elsewhere in the Bicester area there are proposals for:

- Graven Hill MOD site - Consolidation and redevelopment for mixed use development including an MOD freight and distribution interchange along with housing and potential for civilian jobs particularly in the warehousing and logistics sector with a potential rail freight interchange
- Bicester Business Park where there is planning permission for a 60,000sqm (17.5ha) business park 1km south west of the town centre and 3km north of the M40/A34 interchange
- Bicester Gateway (7.5ha) also approximately 3km north of the M40/A34 interchange and promoted for a business park aimed specifically at high tech knowledge industries

²⁰ <http://www.cherwell.gov.uk/index.cfm?articleid=1730>

- East Bicester – mixed use development area including 18ha of employment land promoted for primarily BI Business uses, including storage, lifestyle and light commercial and some high tech knowledge industries
- RAF Bicester – proposed mixed use development including airfield, aerodrome and tourism and heritage related uses and 17ha of mixed employment area
- North East Bicester Business Park (2.7ha) promoted for office development
- South West Bicester – a mixed use development incorporating 2.8ha employment area for BI Business use and a hotel
- Bure Place Town Centre redevelopment including a new supermarket, cinema, restaurants, other shops, a car park and a new bus interchange should be complete by 2013

5.20. These proposals have an indicative employment creation of over 19,000 jobs although it is also noted in the plan that the working age population is expected to only rise by 1,000 to 2031.

Banbury

5.21. Banbury lies about 5 miles beyond the edge of West Oxfordshire District to the north east, and has a strong manufacturing base and close links with the Motorsport sector. A 24.5ha site adjacent to the M40 is being promoted for a variety of employment types.

Kidlington and Begbroke

5.22. Kidlington lies just beyond the eastern boundary of West Oxfordshire District. Oxford University's Begbroke Science Park²¹ is located just off the A44 and is home to a number of research groups in the engineering, materials and life sciences as well as science-based business start-ups, university spin-outs and knowledge transfer activities.

5.23. This area also adjoins the London Oxford Airport. Cherwell's Proposed Submission Local Plan proposes a small scale review of the greenbelt in this area to enable the continued development of this hub of research and development activity. A new business park, the Oxford Technology Park, is proposed to provide bespoke research and production premises to support high tech and bio tech businesses, academic spin out and ICT companies. As such businesses grow, there is potential for them to move on to larger premises in locations at Witney and also Bicester.

Swindon

5.24. Swindon, to the south west is also a growth point with significant housing and employment development planned, particularly to the east of the town. The Swindon Revised Core Strategy Submission Document March 2011 identifies 52.5 hectares of additional employment land to be provided between 2006 and 2026.

²¹ <http://www.begbroke.ox.ac.uk/>

5.25. Swindon serves a different market than West Oxfordshire, being particularly specialist in financial and business services and car manufacturing. Therefore whilst growth at Swindon is less likely to attract firms from West Oxfordshire, it has potential to attract more workers.

Cotswold

5.26. Cotswold is a mainly rural District to the west of Oxfordshire and shares several characteristics. Much of the area is within the Cotswolds AONB and it is an important tourist area with many small businesses but has few larger employment areas mainly focussed in the main towns including Cirencester, Tetbury, Bourton on the Water and Moreton in the Marsh. The Cotswold Innovation Centre at RAF Rissington lies just beyond the West Oxfordshire boundary.

5.27. The recent Cotswold Economy Study July 2012²² recommends a future strategy which reaffirms Cirencester as the primary employment settlement but with some employment growth in the other towns and rural area.

Summary

- The Oxfordshire Local Enterprise Partnership (LEP) was launched in 2011 and focuses on developing markets in green technologies, advanced materials and engineering, and higher value R&D science based sectors. The locational focus of the LEP is the A34 corridor including Science Vale (Abingdon – Didcot area), Bicester and Oxford. Priorities are to improve fast broadband connectivity, skills and employability, inward investment, business finance and infrastructure.
- Science Vale is a particular focus for internationally significant science and research activity including the Diamond Light Source at Harwell, the UK Atomic Energy Authority's JET experimental fusion facility at Culham and Milton Park one of the largest business and science parks in Europe. This area has been designated as an Enterprise Zone, has land available and attracts commuters from West Oxfordshire.
- There are proposals to improve Oxford's West End including significant new shopping and office provision and also the Northern Gateway proposal which seeks to deliver office and R&D development with highway improvements linking the A40 and A44. Otherwise Oxford has limited development land availability.
- Significant employment land release is proposed at Bicester an identified growth area and 'eco-town' location. The town is close to the M40 and A34 and has strengths in logistics but is also seeking to attract high technology businesses. Development land is also being made available at Banbury, a strong motorsport location and Kidlington, a centre for R&D activity linked to Oxford.
- Swindon located on the M4 to the south west of West Oxfordshire is a growth area but serves a different business market to West Oxfordshire, notably business services and car manufacturing, but does attract some commuters from the District. To the west, Cotswold is a mainly rural area and important tourist area but has few large employment areas.

²² http://www.cotswold.gov.uk/nqcontent.cfm?a_id=14559&tt=cotswold

6. STRATEGY RECOMMENDATIONS AND LAND REQUIREMENTS

6.1. From this economic review the key strategic recommendations may be summarised as:

- Increase the supply of land for businesses to support key industrial, manufacturing, and engineering sectors (including the Oxford Bioscience Cluster and aviation businesses related to RAF Brize Norton) and facilitate investment in the stock of business premises.
- Address transport congestion in towns and on major routes - notably the A40. Although there are proposals to address traffic congestion in Witney addressing wider access issues including the A40 will not be a quick fix. There is a need to continue to lobby for wider network improvements and enable a long term strategy to improve access to Oxford along the A40 corridor.
- Improve the availability of high speed broadband connectivity through working in partnership with providers and ensuring new development is 'broadband ready'.
- Maintain the labour supply with appropriate skills and 'work readiness'. The level of housing proposed broadly maintains the labour supply at 2011 levels although there is a slight decline related to an ageing population. The impacts of changes to statutory pension and retirement will however mean more people are expected to continue working later in life in future. The full impacts of this will need to continue to be monitored.
- Invest in our town centres which appear vibrant but our 'high streets' will face challenges over the coming years due to changing shopping patterns and competition from other expanding centres.
- Promote a successful visitor economy which benefits visitors and local communities alike whilst protecting and enhancing the attractive environment of the District – itself a key economic asset.
- Support a vibrant rural economy through encouraging homeworking, and flexible working practices, small rural business premises and enabling land based sectors to diversify

6.2. These recommendations will not be able to be wholly addressed through strategic planning policies and the Council will need to continue to work in partnership to address issues. This is perhaps particularly relevant to addressing transport and broadband issues. The following sections focus on areas where the Draft Local Plan can have influence through planning policies on land for business, the rural economy, sustainable tourism, and town centres.

Land for Business

- 6.3. The Economy Study in 2007 recommended 3 scenarios for future employment land provision, largely based on an analysis of past trends in provision adjusted to take account of likely future changes.²³ The scenario most preferred by the consultants was to follow a 'Steady Growth' scenario continuing along broadly similar economic lines to the recent past, supporting indigenous growth with modest inward investment. This scenario was also most supported through public consultation (see Appendix 2).
- 6.4. The Steady Growth scenario involved completion of approximately 13,000sqm of employment floorspace annually which required approximately 64ha of employment land provision over the 20 year period 2006 to 2026²⁴ In 2006 approximately 30ha of employment land had planning permission leaving a further 33ha to come forward. It was not intended that all of this additional land would need to be allocated as some would come forward through criteria based policies particularly in the rural areas and villages.
- 6.5. The Economy Study was prepared in 2007 and therefore before the effects of the current recession were envisaged. The Economy Study forecasts and land provisions therefore may appear optimistic and excessive, particularly in the short term (although in the last 5 years floorspace completions have been broadly on trend noting significant development at RAF Brize Norton).
- 6.6. The Economy Study forecasts however projected to 2026 and this longer timescale would be expected to cover both periods of downturn and recovery to stronger growth within economic cycles. Stronger growth in the later period of the plan could balance out slower growth conditions at the present time. It should also be noted that the level of growth assumed in the preferred Steady Growth scenario was the lower of the past take up growth rates reflecting the potential for restructuring of the economy and also an ageing population. It is considered therefore that the forecasts continue to represent a robust basis for future employment land planning.
- 6.7. It is also important to note that should new post-recession employment based forecasts be obtained, there is a risk that these would be based on unusually low estimates of job growth and potentially constrain the longer term growth of the local economy.
- 6.8. It was apparent through the 2007 Economy Study and this update that more land is needed to provide flexibility for the expansion and relocation of businesses (which in turn may help facilitate the regeneration of existing employment land) and also to provide inward investment opportunities. This additional land flexibility has been important in the past in attracting inward investment, particularly in a District which faces strong competition from nearby areas with arguably better transport links.
- 6.9. Furthermore the emerging Draft Local Plan approach is not to allocate up front the total land requirement and as such can apply the plan, monitor and manage approach throughout the plan period.

²³ See Chapter 7 of the Economy Study 2007 for the full methodology

²⁴ This implies a plot density of 0.41 for employment land i.e. 1ha of employment land delivers 4,100sqm of floorspace

- 6.10. Between 2006 and 2011 almost 59,000sqm of floorspace was completed (including 24,000sqm at RAF Brize Norton). This represents approximately 11,000 sqm of additional floorspace per year and as such is broadly in line with the steady growth scenario.
- 6.11. For the period of the Draft Local Plan, 2011-2029, the steady growth scenario would indicate provision for a further 250,000sqm of floorspace (60ha land equivalent).
- 6.12. As at 1st April 2012, 1,500sqm of floorspace had been completed during the 2011-2012 year and 42,500sqm (10.5ha site area equivalent) of employment floorspace had permission. In addition approximately 15.5ha of land for employment remains in local plan allocations and other sites with planning permission (See Appendix 1). This represents approximately 26ha identified through remaining local plan allocations and planning permissions.
- 6.13. The Draft Local Plan retains these previous allocations and makes provision for a strategic development site to the West of Witney including a 10ha employment land allocation. It has also been noted that a planning application has now been received for development of this site. In total 36ha is therefore identified.
- 6.14. A significant proportion of past supply has come forward through criteria based policies particularly in the rural areas and villages which are proposed to continue. In the past such policies have contributed to around 25% of supply.
- 6.15. The identification and allocation of employment land does not guarantee that land will be developed for business development. Reflecting the current uncertain economic climate it is considered prudent to apply the plan monitor and manage approach to further provision and where necessary, further provision may be made through future Local Plan or site allocation documents and neighbourhood plans.
- 6.16. Given the need for additional employment land over the plan period which requires greenfield land take up, the retention of existing sites is also of importance to ensure an ongoing sufficient supply of sites and premises and to retain the distribution and balance of uses apparent throughout the towns, villages and rural area. Previous policy approaches to the expansion and retention of employment sites where they remain suitable and viable is therefore recommended.
- 6.17. The employment land audit and market views have noted that many sites are now too dated to meet modern requirements and there is a growing lack of supply of modern units. The retention of existing sites enables the best use to be made of the supply, with development land available to provide units to meet those in need of more modern premises.
- 6.18. It is considered that some uses such as cafes or crèches may help improve the functionality of existing sites and may help stimulate their regeneration. Policies should allow for this whilst ensuring employment sites are in general more appropriate to accommodate the typical B –class uses (offices, industrial and warehousing).
- 6.19. The following paragraphs consider the land supply and need for additional land in the main towns with further detail given in Appendix 4.

Witney

- 6.20. The Economy Study 2007 and recent market views identified land to the west of Witney as the most obvious location for a major share of future employment land where strategic road access is better than most other parts of the District and will be enhanced by the planned new junction with the A40. It is also a location where much new employment development has taken place in recent years confirming its attractiveness to the market.
- 6.21. Land in this area was allocated for employment in previous local plans and it is estimated that in the previous 15 years since 1996 there was take up of about 15ha of land.
- 6.22. Including the 10ha of employment land currently subject to a planning application at West Witney, there is approximately 21ha of employment land supply (excluding existing vacant premises) which is considered sufficient to meet needs over the next 15 years. Further proposals would however be considered on their merits.

Carterton

- 6.23. The Economy Study in 2007 identified sufficient employment land for the short to medium term and any further provision would be for longer term needs – with a greater emphasis on industrial space, and some low cost start up units for small firms. This was reiterated in recent agent views.
- 6.24. The main area of land available is at the West Oxfordshire Business and Retail Park with some development plots remaining at Ventura Park and one development opportunity at Carterton South Industrial Estate. In total there is 5ha of development land remaining but there is also a further 2.5ha of land where premises have been built but remain vacant.
- 6.25. Both West Oxfordshire Business Park and Ventura Park were allocated in previous Local Plans (in total approx 11ha). Over the last 15 years take of this land has been slow with 5ha of land remaining undeveloped although a further 2.5ha remains with where units have been built but largely remain vacant.
- 6.26. It is considered that existing available land and premises in Carterton are likely to be sufficient to serve the town over the next 15 years. Existing identified land at the West Oxon Business Park and Ventura Park is the most suitable location for further employment provision. Any strategic development allocation in the town, depending on its scale, could instead make provision for start up units perhaps integrated with local centre facilities.
- 6.27. The 2007 Economy Study also noted that some agents views were that Carterton is an expanding market and that should one or two aircraft related businesses take up land in the town the land supply could be rapidly used up. In this instance it is therefore important to monitor the situation to ensure that further employment growth in the town can be accommodated.

Chipping Norton

- 6.28. The Economy Study 2007 noted that existing industrial estates are largely full and recommended a modest amount of additional employment provision - in the order of 2ha to be located in the east Chipping Norton area.

- 6.29. Over the last 15 years the Parker Knoll factory has closed and much of it has been redeveloped for housing with 2ha of the site remaining for employment (B1) uses. The Owen Mumford factory has however expanded significantly. In terms of smaller premises there has been very little new provision or take up of land with only one plot developed at Cromwell Park.
- 6.30. It is considered that the supply of land potentially available in Chipping Norton (5ha) should be retained. The key need appears to be to facilitate the delivery of small industrial premises. Further consideration is expected to be given to employment land provision through the emerging Neighbourhood Development Plan for the town.

Supporting the rural economy

- 6.31. Our rural areas are attractive places to live but we must seek to ensure that they remain attractive places to work so that our rural communities remain vibrant. This review indicates that businesses in rural areas are typically engaged in similar activities to our urban areas with a high proportion of service based activities, although businesses tend to be smaller and there is more home working and self employment. High speed broadband and mobile telecommunications will be crucial to the success of such businesses.
- 6.32. The NPPF advocates that plans should support the growth and expansion of all types of businesses and enterprise in rural areas through the conversion of existing buildings and well designed new buildings, the diversification of agricultural and land based businesses, and through supporting sustainable rural tourism.
- 6.33. In West Oxfordshire the main towns have generally better transport connections and in the interest of sustainable development are more appropriate locations for larger businesses and employers and more significant employment development.
- 6.34. Past local plans have not made employment land allocations outside of the main service centres but have supported the rural economy through criteria based policies enabling existing businesses in rural areas to expand and the development of new sites where commensurate in scale with their location.
- 6.35. At earlier stages of the Draft Local Plan (at that time known as the Core Strategy) it was proposed to widen this approach to all villages and this received broad support through consultation subject to appropriate safeguards to ensure that the impact of proposals do not adversely affect the character of rural communities. It is proposed that this policy is incorporated as part of Core Policy 2 - Locating Development in the Right Places.
- 6.36. Previous policies also supported the rural economy through a positive approach towards homeworking, flexible working practices, and farm diversification. This review highlights the need to retain a policy approach which facilitates their contribution to the rural economy whilst incorporating clarification as to the role of large estates in the rural economy and their need to diversify also.

Re-use of rural buildings

- 6.37. This economic review indicates that redundant rural buildings can provide attractive business premises and there are examples of high quality offices and workshops throughout the rural area. Market views indicated a continuing yet steady supply for such premises to meet future business needs and such premises are also a key component of the supply of visitor facilities. The reuse of buildings in the countryside is therefore an important component of the approach to sustainable economic growth.
- 6.38. The NPPF also identifies the role of existing buildings in supporting rural enterprise (para 28). Previous national policy (PPS4) had however gone further to specifically identify a preference for the conversion of redundant rural buildings to economic uses before residential uses were to be considered but this specific preference is absent from the NPPF. Noting their respective development values, the re-use of buildings for residential use is likely to be more financially attractive and a policy which does not require consideration of the economic re-use of existing buildings before residential would severely limit the potential of such buildings to support the rural economy in the future.
- 6.39. The NPPF (para 55) continues the premise of avoiding new isolated homes in the open countryside unless there are special circumstances but the reuse of redundant buildings is identified as a special circumstance where the immediate setting can be enhanced.
- 6.40. As a large rural area there are many redundant vernacular buildings in the District and many are important to defining the local distinctiveness of the area and character of the countryside. However, it is as agricultural buildings that they contribute to the visual character of the area and many are heritage assets in their own right. To secure such buildings and their contribution to the character of the surrounding area, alternative and active uses may need to be found. The West Oxfordshire Design Guide SPD (Appendix 8) identifies that residential use generally involves such dramatic alteration to the original character of the building that the building and perhaps its setting is damaged for example through the delineation of private amenity space etc. Non-residential uses will generally involve less harm, requiring fewer alterations to such buildings and their setting. The NPPF (para 131) reflects this advice and in determining applications local planning authorities should take account of "...the desirability of sustaining and enhancing the significance of a heritage asset and putting them to viable uses consistent with their conservation"
- 6.41. A core planning principle of the NPPF (para 17) is to actively manage patterns of growth to make the fullest possible use of public transport, walking and cycling. In the open countryside where there are very limited opportunities for public transport use, walking and cycling economic uses such as visitor accommodation involve fewer day to day movements than permanent residential accommodation. In addition the NPPF advocates that housing should be located where it would enhance or maintain the vitality of rural communities (para 55).
- 6.42. Therefore having regard to the principles of the NPPF as a whole and the West Oxfordshire context, it is considered that the preference of the economic re-use of buildings in the open countryside should be retained in Local Plan

policies as this strikes an appropriate balance between the provision of housing in sustainable locations, protecting and enhancing the special character of the area and supporting our rural economy. A suggested exception is where specific local housing needs would be met and could not be met in a more sustainable way.

Local services and Community facilities

6.43. Local services and facilities (such as villages shops and pubs) continue to be an important part of the rural economy and are vital in meeting the day to day needs of residents. However, recent trends have seen the closure of such facilities due to changing social and economic trends but also because conversion to residential is often financially attractive. It is important to the sustainability of our rural communities that where feasible such facilities are retained. It is recommended that the policy approach of the Local Plan to resist the loss of these facilities is retained whilst also promoting the development of new facilities.

Sustainable Tourism

6.44. This review has highlighted that tourism and the visitor economy continues to be a significant business sector in the District which reflects the attractive countryside, rivers, towns and villages along with some specific attractions. The NPPF supports rural tourism that benefits businesses, communities and visitors and respects the character of the countryside. A sustainable tourism approach is therefore proposed which promotes the economic benefits of tourism and visitor related development whilst ensuring that the character of the area as a key economic asset is not harmed. The tourism and visitor potential of the River Thames and Lower Windrush Valley are recognised.

Town Centres

6.45. Our town centres are a significant economic asset and indications are that they are performing relatively well. National policy remains to focus new shopping and leisure development within town centres. A separate Retail Needs Assessment Update 2012 report has considered further the health of the main town centres and future development needs.

Estimate of job generation

6.46. The 2001 Census indicated there were 42,600 jobs (people working in West Oxfordshire) and 50,500 workers living in the District. This highlighted an imbalance of around 8,000 fewer jobs than working residents (but gross out-commuting of 18,000 residents). More recent, ONS estimates for the District at 2008 indicated that there were 49,000 jobs²⁵ and 56,000 economically active people.

6.47. To provide an estimate of the scale of potential job growth in the District, the proposed level of identified employment land provision (36ha) has the potential to generate around 5000 jobs, primarily focused at Witney, Carterton and Chipping Norton. When combined with some small rural employment sites and other sectors such as retail and tourism, health and education, and

²⁵ Nomis District Profile- Includes employees, self-employed jobs and HM Forces jobs.

- increased personnel at RAF Brize Norton around 10,000 jobs could be generated over the plan period 2011-2029 - see Appendix 3 for further detail.
- 6.48. This would represent potential for a 20% increase over ONS job estimates. Current ONS estimates for the number of jobs and the number of workers in the District are however subject to significant variations. Estimating the current balance between jobs and workers and how many jobs the strategy will end up providing is therefore difficult. The level of job growth could be much less if new employment land is taken up by businesses relocating within the District and if some sites are lost.
- 6.49. Demographic forecasts of the future labour supply indicate an overall net reduction in labour force of around 1,100 over the plan period (2011-2029). These forecasts do not however take account of planned changes to retirement and pension ages and as such indicates that the forecast reduction in the labourforce may be less.
- 6.50. The 2001 Census also shows that there is significant potential to reduce out-commuting from the District. Given the likely static nature of the future size of the labourforce, should the estimated level of job generation be realised this provides significant potential to improve the balance of workers and jobs in the District. With 2011 Census results yet to be released the balance between jobs and workers will need to continue to be monitored as new data becomes available.

Appendix I Summary of Evolution and Consultation on Draft Local Plan (formerly Core Strategy) Economy Policies

Stage	Consultation and key points raised
<p>Economy Study 2007</p> <p>Three scenarios of future economic growth were identified:</p> <p>Steady Growth – continuing along broadly similar economic lines to the recent past, supporting indigenous growth with modest inward investment and 33ha employment land provision (in addition to existing commitments 30ha) to 2026. This was identified by the consultants as that which offered most benefits with fewer risks and constraints.</p> <p>Aim for Higher Growth – with 50ha of additional employment land provision, 80ha in total, to support indigenous firms but encouraging more inward investment and capitalising on Oxford’s growth and high value/knowledge based activities.</p> <p>Indigenous Growth – lower levels of growth broadly matching levels of new jobs to growth of the local labour supply and making provision for a modest 10ha of additional employment land (30ha in total)</p>	<p>A range of landowners, developers, property agents, businesses and business organisations were consulted as part of the Economy Study including in a workshop. These organisations are detailed at Appendix I of the Economy Study and a summary of Feedback from the consultation event included at Appendix 8.</p>
<p>Issues and Options Consultation March 2008</p> <p>Set out the main spatial options for housing and employment – including: 1) Concentrate on Witney, 2) Concentrate on Witney Carterton and Chipping Norton and 3) More dispersed development</p> <p>Set out three scenarios identified in Economy Study (above) and asked for views on preference.</p> <p>Considered how land for business</p>	<p>All those on LDF consultation database notified of the consultation</p> <p>Comments included: Concentrate on Witney, Carterton and Chipping Norton most preferred by respondents</p> <p>Steady growth scenario most preferred by respondents. Key issues raised included: achieve a better balance between jobs and labour supply; limiting growth due to pressure on labour supply; promote growth to reduce commuting and diversify the economy; lower growth may constrain</p>

<p>should be distributed and asked whether a more flexible approach should be applied to allow provision of small new employment sites in smaller villages to support rural diversification. Suggestions for additional town centre, tourist or leisure needs requested.</p>	<p>flexibility and being able to respond to market; recognise some growth may be organic; need to improve transport infrastructure to support growth. Some suggested spreading employment growth to relieve pressure of Witney.</p> <p>Broad support for a more flexible approach to small new employment sites in villages to support rural diversification – many noting employment contribution to vitality of rural communities. Suggestions that focus on service centres or villages with good access to services, public transport or affordable housing. Concerns raised regarding traffic impact and impact on character of rural communities.</p> <p>In relation to town centre development there was support for additional shops and services in Carterton and Chipping Norton town centres with existing proposals in Witney town centre considered sufficient. More parking and better transport links were key issues along with retaining market town character, encouraging independent local shops, farmers markets and sale of local produce.</p> <p>Comments expressed that generally the District was well served with tourism and leisure facilities and a need to avoid inappropriate large scale tourism development.</p>
<p>Core Strategy So Far Consultation February 2009</p> <p>Set out the emerging approach:</p> <ul style="list-style-type: none"> • In accordance with broad spatial strategy and Smart Growth, most economic growth to be directed to the towns and larger villages • Minimum 10ha employment land to be provided west of Witney. Need for further site specific provision to be considered through site allocations process. • Criteria based policies to 	<p>All those on LDF consultation database notified of the consultation</p> <p>Comments included:</p> <ul style="list-style-type: none"> • Support for emerging approach to Smart Growth – referring to SE Plan definition • Support for growth rate given congestion issues on A40 and in Witney • Promote a world class economy and give priority to development which supports educational, scientific and technological sectors (within Central

<p>encourage modernisation of existing employment sites, adaptation and expansion of existing businesses, provision of new sites through rural diversification, visitor related proposals which add to sustainable rural prosperity respect and enhance intrinsic qualities of the District.</p> <ul style="list-style-type: none"> • Town centre first approach to significant shopping development and town centre uses. Town centre hierarchy defined • Land continued to be identified in Carterton Town Centre • Resist loss of local shops and community facilities 	<p>Oxfordshire Sub-region/Diamond for investment and Growth)</p> <ul style="list-style-type: none"> • Promote local employment areas to reduce out-commuting. • Actively promote communications infrastructure • Recognise the contribution of the RAF to the local economy and opportunity to increase higher skilled jobs in Carterton through presence of RAF and linked specialist businesses (AirTanker) and through highly skilled labour coming out of RAF – need for business start up units. • Increase employment and retail provision in Carterton given high out-commuting and loss of expenditure from the town. • Encourage farming for environmental management reasons • Increase proportion of employment land directed to Witney to reflect level of housing. • Witney remains a tourist attraction, commercialisation of Church Green should be resisted and Conservation Area preserved. • Resist loss of employment sites and need for more in Chipping Norton including small industrial starter units • Resist loss of shops and burgage plots is last opportunity for expand town centre
<p>Core Strategy Preferred Approach Consultation February 2010</p> <p>Set out the preferred approach:</p> <ul style="list-style-type: none"> • Focus on main towns retaining existing allocations and remaining land to improve jobs/homes balance • Minimum 10ha employment land to be provided west of Witney to provide opportunities for inward investment, relocations and high technology businesses • Need for further site specific provision to be considered through site allocations process. 	<p>All those on LDF consultation database notified of the consultation Reminder sent to some 120 businesses by Council’s Business development officer.</p> <ul style="list-style-type: none"> • Support for general approach which fits with strategic objectives of Oxfordshire 2030 • Priority should be given to educational, scientific and technological sectors within Central Oxfordshire Sub-region. • Principle of Smart growth • Should indicate broad amount and distribution of additional floorspace • Refurbishment of stock is referred to but unclear on how achieved

<ul style="list-style-type: none"> • Promote efficient use of existing employment sites through retention, intensification and redevelopment • Provide flexibility and enable rural diversification through: <ul style="list-style-type: none"> • Enabling expansion of existing businesses • Support for homeworking • Development of small business premises in or next to towns and villages where consistent in scale and character with rural area • Support farm diversification which sustains farm enterprise • Support rural diversification within large country estates • Promote sustainable tourism which capitalises on and protects the attractive environment, utilises existing attractions and buildings. New tourism development where this enhances the environment of the District and benefits local communities and visitors alike. • Town centre hierarchy and development opportunities identified 	<ul style="list-style-type: none"> • Principle of Smart growth but thin on how achieved • Potential skills gap relating to rural economy/diversification • Refer to partnership working on skills and training and actively encourage the development of ICT Infrastructure • The balance of people and jobs is critical in addressing climate change – but assumes people will take jobs near to where they live • 10 ha of land west of Witney should be a ceiling and lack of evidence for a high tech cluster here • Object to 10ha of land west of Witney – new business park (11ha) proposed East of Witney. • Encourage further retail and employment in Carterton • Employment land for Chipping Norton over-estimated • Support for farm and non-land based rural diversification, non-agricultural farm diversification and re-use of buildings in countryside – striking a balance between landscape protection and reasonable economic development • Support approach to efficient use of existing employment sites but seek clarification on employment uses considered appropriate on employment land
<p>Draft Core Strategy January 2011</p> <p>Draft strategy and policies set out including:</p> <ul style="list-style-type: none"> • New land for business focussed on main towns where transport and communications infrastructure and support a range of businesses including large scale and high technology businesses • In Witney 10 ha of available land to be retained and additional strategic allocation of 10ha to west of town with potential for high tech businesses • In Carterton 7.5ha of available land to be retained 	<p>All those on LDF consultation database notified of the consultation. Reminder sent to some 600 businesses by Council’s Business development officer.</p> <ul style="list-style-type: none"> • Labour force projected to contract but support for objective of providing more jobs to support employment growth and promote higher value jobs to reduce out-commuting • Strategy has ignored issue of A40 and should be pushing to resolve it • Relying on existing land supply with few new sites may limit sustainable economic prosperity and ability to reduce commuting • Likely deficiency of next generation

<ul style="list-style-type: none"> • In Chipping Norton 5ha of land to be retained • Strategy also for vibrant town and village centres and to improve diversity of rural economy; • Overall spatial strategy provides opportunities for new business development in services centres and villages • Detailed policies set out on: <ul style="list-style-type: none"> ○ Efficient use of existing employment sites ○ Farm and country estate diversification ○ Sustainable tourism ○ Town centres 	<p>broadband need to take a proactive role in promotion</p> <ul style="list-style-type: none"> • Support for 10ha allocation west of Witney but references to high tech businesses/SMEs should not fetter market • Objection to 10ha west of Witney – provision should be made for sustainable business park east of Witney to redress balance of growth • N Gateway proposals conflict with strategy for Witney • Insufficient employment in Carterton, need for improved town centre and increase in local employment as part of major new housing development • New jobs needed alongside new homes in Chipping Norton to maintain jobs/homes balance. Need for small/medium sized business premises • Eynsham seek to increase local jobs • Support for farm and estate diversification policy, but focus should be on large estates and (affordable) housing should be considered for redundant farm buildings
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Appendix 2 Employment land commitments at 1st April 2012

Floorspace with permission but unimplemented at 1st April 2012								Land area equivalent* of floorspace with permission (ha)	Area with permission but no floorspace detail (ha)	Remaining allocated Land (ha)	Total estimated land area available (ha)
Settlement	BI (a)	BI (b)	BI (c)	B2	B8	Unspec	Total				
Bampton	-65	0	0	0	0	344	279	0.07			0.07
Black Bourton	0	0	0	0	205	0	205	0.05			0.05
Bladon	0	0	-85	0	0	0	-85	-0.02			-0.02
Brize Norton	0	0	1,908	0	0	0	1,908	0.47			0.47
Broadwell	39	0	0	0	0	0	39	0.01			0.01
Burford	112	0	-171	92	0	0	33	0.01			0.01
Carterton	-172	0	42	-82	-134	236	-110	-0.03	4.70		4.67
Cassington	-15	0	0	37	0	0	22	0.01			0.01
Charlbury	31	0	105	0	0	-550	-414	-0.10			-0.10
Chipping Norton	2,012	0	0	-189	-199	335	1,959	0.48	2.00	2.40	4.88
Churchill	0	0	-129	0	0	1407	1,278	0.31			0.31
Clanfield	0	0	0	240	0	0	240	0.06			0.06
Crawley	0	0	0	0	0	-400	-400	-0.10			-0.10
Curbridge	60	0	0	0	15	0	75	0.02			0.02
Ducklington	0	0	-455	0	-170	0	-625	-0.15			-0.15
Enstone	675	693	0	0	1740	0	3,108	0.76			0.76
Eynsham	198	0	0	299	-348	0	149	0.04			0.04
Fullbrook	0	0	0	0	0	-49	-49	-0.01			-0.01
Hanborough	787	0	-491	0	0	0	296	0.07			0.07
Minster Lovell	0	0	0	447	-844	0	-397	-0.10			-0.10
North Leigh	0	0	0	184	0	111	295	0.07			0.07
Over Norton	0	0	720	0	0	-52	668	0.16			0.16
Shilton	0	0	0	42	0	0	42	0.01			0.01
Standlake	325	0	173	1889	9272	0	11,659	2.84		1.90	4.74
Stanton											
Harcourt	0	0	3307	0	2874	0	6,181	1.51			1.51
Steeple Barton	0	0	0	525	0	0	525	0.13			0.13
Witney	-3,209	0	382	-683	-11,604	31,710	16,596	4.05	1.81	2.60	8.46
Woodstock	-552	0	0	0	732	-669	-489	-0.12			-0.12
Wootton	-260	0	0	0	0	0	-260	-0.06			-0.06
Total	-34	693	5,306	2,801	1,539	32,423	42,728	10.42	8.51	6.90	25.83

Appendix 3 Estimates of job growth by sector 2011-2029

1. Using average employment densities and an average plot density as stated in the Economy Study report²⁶, existing commitments (permissions and remaining allocations) could generate in the region of 3,500 jobs. The Core Strategy proposes at least a further 10ha of employment land as part of a strategic allocation which could generate a further 1,500 jobs.
2. Past monitoring data indicates that about 25% of employment floorspace has come forward on unallocated sites. Existing policies allow for development of new small employment sites and the expansion of existing businesses in certain circumstances to diversify the rural economy. Assuming this was to continue this has potential to generate around an additional 1,500 additional jobs.
3. The Economy Study estimated that under the steady growth scenario that between 2006-2026 the employment land requirement would generate approximately 8,600 B-class jobs. If this was applied pro-rata to the 17 year core strategy period this would represent 6,700 B-class jobs which is broadly in line with the above estimates.
4. The main growth sectors which may not be accommodated on employment land (outside of the 'B class uses') are considered to be:
 - Retail –The West Oxfordshire Retail Needs Assessment Update 2012 identifies baseline capacity of 22,500sqm of retail floorspace over the plan period 2011-2029. If this floorspace were to be delivered Job growth in the retail sector could therefore be around 1,200 jobs.
 - Tourism – Experian forecasted 700 jobs 2011-2026. This level of job growth appears high. Tourism is a sector with growth potential reflecting the District's attractive countryside and specific attractions. There is unlikely to be significant new hotel development in the District although some increase in tourism jobs is likely and is considered below. In 2008 estimates were that 4,800 jobs were tourism related (NOMIS, ABI). The tourism strategy for the District is to utilise exist assets rather than the development of new major attractions. A provisional estimate of new jobs related to tourism (including hotels) is an increase of 500 jobs – a 10% increase.
 - Education – 300 jobs forecasted by Experian 2011-2026. New primary school and secondary school/sixth form facilities are likely to be required to support new housing development. This level of jobs is considered realistic.

²⁶ 1 job per 20sqm of office floorspace (B1a and B1b use classes), 1 job per 30sqm of industrial floorspace (B1c and B2 use classes, also applied where use class not specified) and 1 job per of 40sqm (B8 use class). Average plot density of 0.41 assumed such that 1ha yields 4,100sqm of floorspace.

- Health - 400 jobs forecasted by Experian 2011-2026. Although more jobs are likely to be generated in health sectors due to an ageing population, and investment in care facilities, a significant increase in jobs in hospitals is unlikely. This level of job creation is reasonable.
- RAF Brize Norton - the MOD indicate that personnel on the base are expected to increase from around 4000-6000 during 2012 but then decline to around 5,000 as old aircraft are retired.

Summary of potential job growth by sector 2011-2029

Source	Estimated Jobs 2011-2029
Employment supply committed (25ha)	3,500
New employment allocations (10ha)	1,500
Rural diversification	1,500
Town Centres and Retail	1,200
Tourism	500
Education and Health	700
RAF Brize Norton	1,000
Total	9,900

Appendix 4 Available development land in Witney, Carterton and Chipping Norton and Standlake

Land East of Downs Road

- W1. Land at Windrush Park (rear of Abbot Diabetes) 5.4ha, 21,000sqm 'B' class floorspace permitted under planning permission 06/0255/P/OP, subsequent application for Erection of new HQ offices and manufacturing building for Owen Mumford on 2.9ha part of the site and for 12,110sqm of which over half offices (12/1375/P/FP) This is envisaged as phase 1 of the development for this company. 2.5ha therefore remains for the expansion of the business.
- W2. Plot 3 De Havilland Way (0.5ha, 3000sqm B8 floorspace, planning permission 05/0415/P/RM)
- W3. Plot 1 De Havilland Way, 1ha, permission granted 11/1957/P/FP for extension of Oxford Motor Products warehouse 3,857sqm – under construction.
- W4. Land at Book End (0.3ha, permission, W2003/0950)
- W5. Land between Burford Road and Downs Road (1.8ha, 07/0454/OP granted June 2011, of which 0.4ha granted permission for a car park to be used in conjunction with Witney Motor Auctions)

Land West of Downs Road

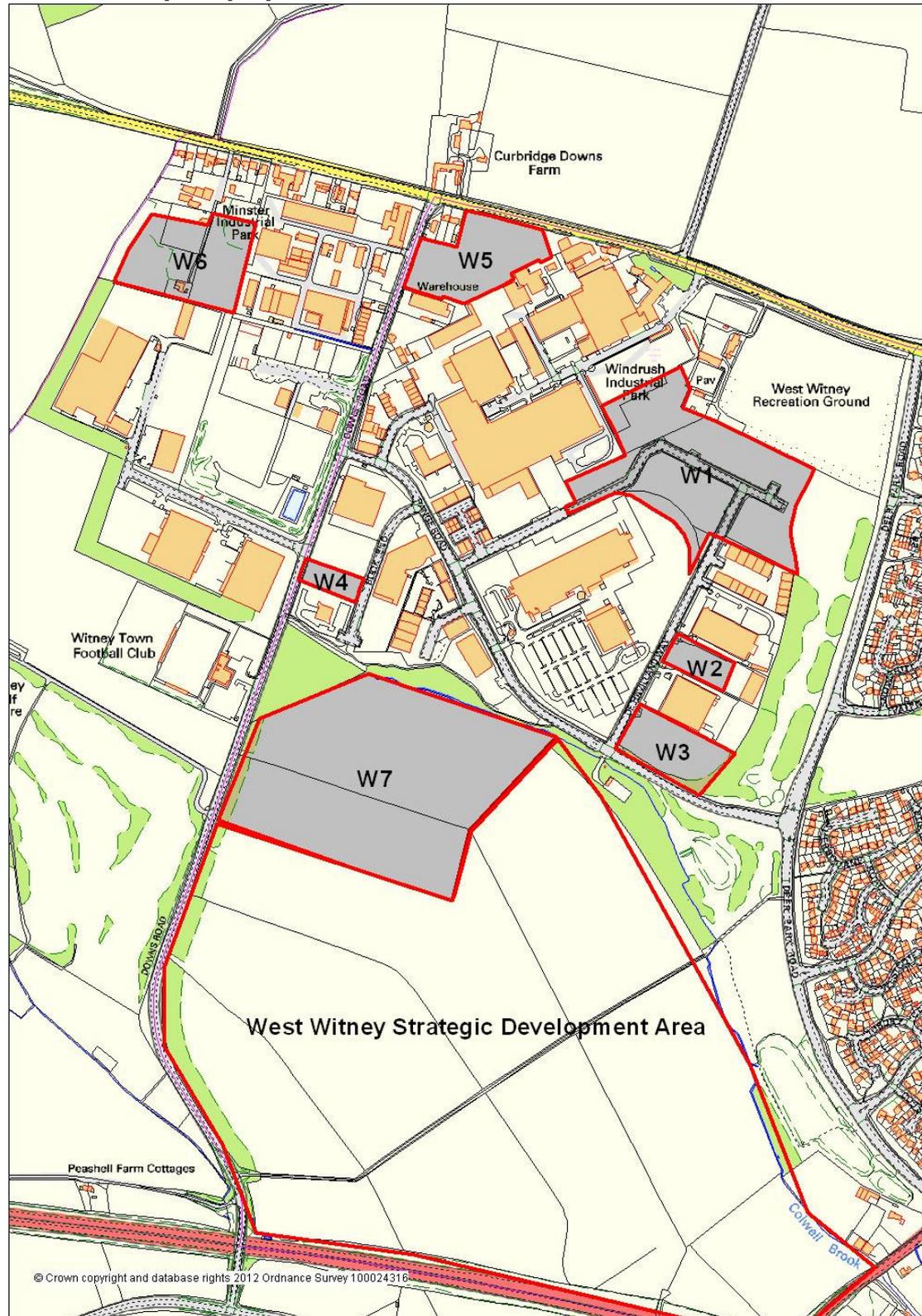
- W6. Land to the rear of Bromag and adjacent to Stewart Milne, 2.3ha – no planning permission

Existing Witney Total = 10.9ha of which 7ha remaining without apparent occupier interest.

North Curbridge Development Area

- W7. A planning application has now been received for land to the west of Witney, including upto 1,000 dwellings and an employment area of 10ha and a new junction between the A40 and Downs Road. A mix of employment uses will be promoted to encourage high technology manufacturing as well as light and general industry, and some storage and distribution. Uses will include B1(a) Offices, B1(b) Research and Development, B1(c) Light Industry, B2 General Industry and B8 Storage and Distribution, with a working assumption that B8 development will not exceed 25% of the total land area. It is envisaged that the North Curbridge employment area could create opportunities for approximately 1,000 jobs and possibly up to 2,100, depending on the type of businesses.

West Witney Employment Estates



Carterton**West Oxon Business Park**

- **Area A** – Vacant land and no recent planning permission 1.6ha
- **Area B** – Four buildings erected for 'B' use 0.5ha, permission 04/0301/P/RM, 2017sqm and unit extended by 222 sqm, 04/1777/P/FP, part change of use to day care centre 10/0954/P/FP – all completed during 2011. Mostly vacant but
- **Area C** – Total area 2.4ha, office/ retail (non-food) units built including car parking (ref 04/0491/P/RM) on 1.4ha part of the site. 1ha vacant land and recent subject to application from Sainsbury's (09/0963/P/OP) for a retail store which was refused.
- **Area D1** – Vacant land, 0.4ha, permission granted for a public house and 31 bed roomed lodge, 06/1496/P/FP. Permission now lapsed.
- **Areas D2 and E** – Vacant land no recent planning permission 0.6ha
- **Area F**
- **Area G**

Total available land/vacant premises = 5ha of which 3.6ha vacant land

Ventura Park

- V1. Vacant land (0.4ha)
- V2. JS Van Hire (planning ref 06/1837)
- V3. Building contractor (planning ref 10/0426)
- V4. 3-storey office, ZINC mostly let including to Blue Cross, (planning ref 06/0878)
- V5. Fencing contractor (planning ref 09/1368) - Warefence
- V6. Industrial/warehouse units of varying sizes, complete majority vacant (0.5ha) (planning ref 06/2145, 4480sqm 'B' class floorspace) Only one unit appears occupied by Motor Parts Direct
- V7. as V6 (0.4ha)
- V8. Vacant land (0.3ha)
- V9. HiQ MOT station (planning ref 06/1638) - complete
- V10. Offices - were let to Air Tanker potentially being reused as enterprise centre (planning ref 07/0608)
- V11. Vacant land (0.1ha)
- V12. Permission for offices Blagrove Fleet Insurance services (planning ref 07/1595/P/FP). Site currently undeveloped. (0.2ha)

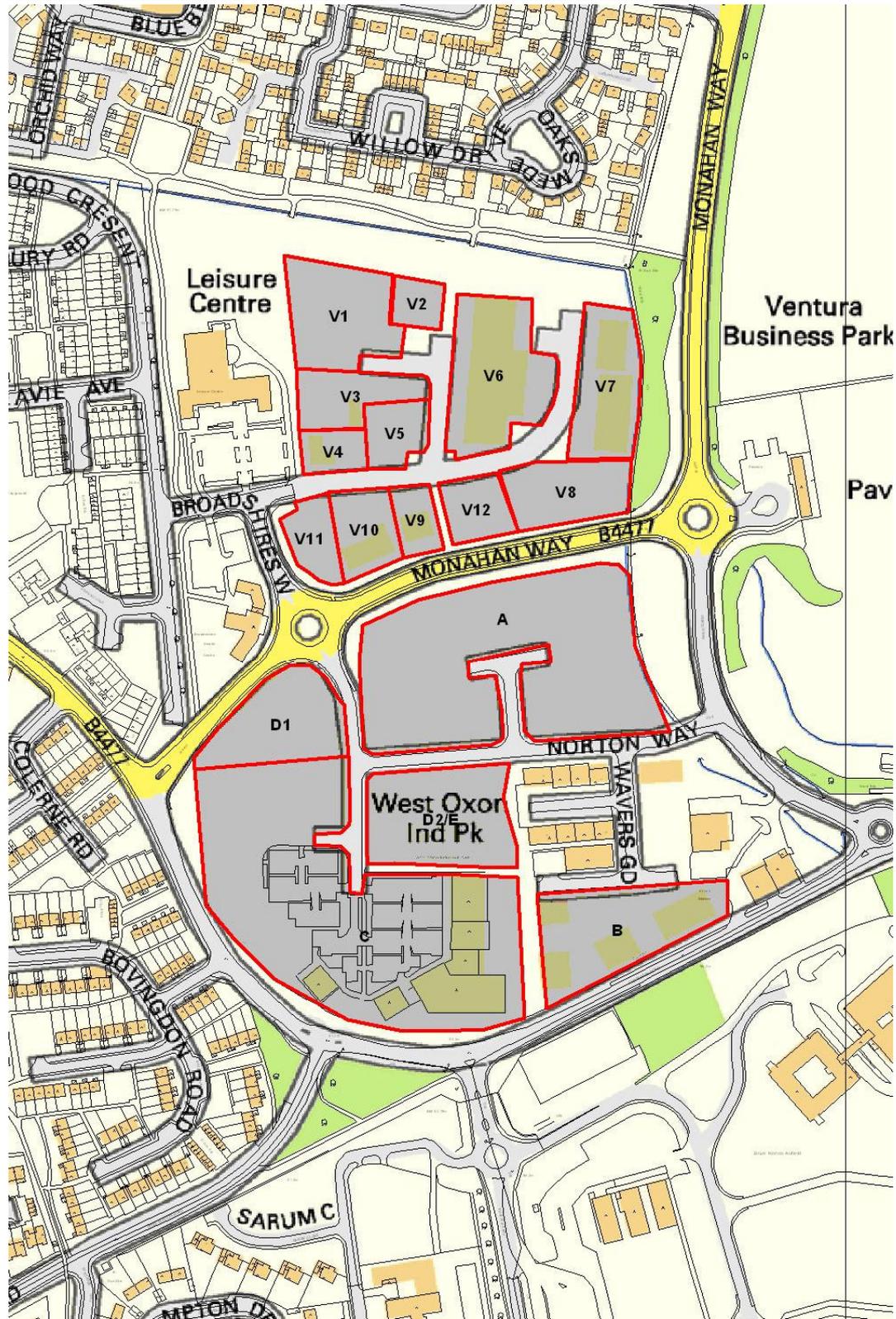
Total available land/vacant premises = 2.0ha of which 1.1ha vacant land

Carterton South

CS1 – Plot 1 and 2, 0.5ha, Permission granted for the erection of business units 07/0362/P/FP – permission lapsed.

Overall Total = 5ha vacant land and approx 7.5ha if vacant premises included

Ventura Park and West Oxon Business Park, Carterton



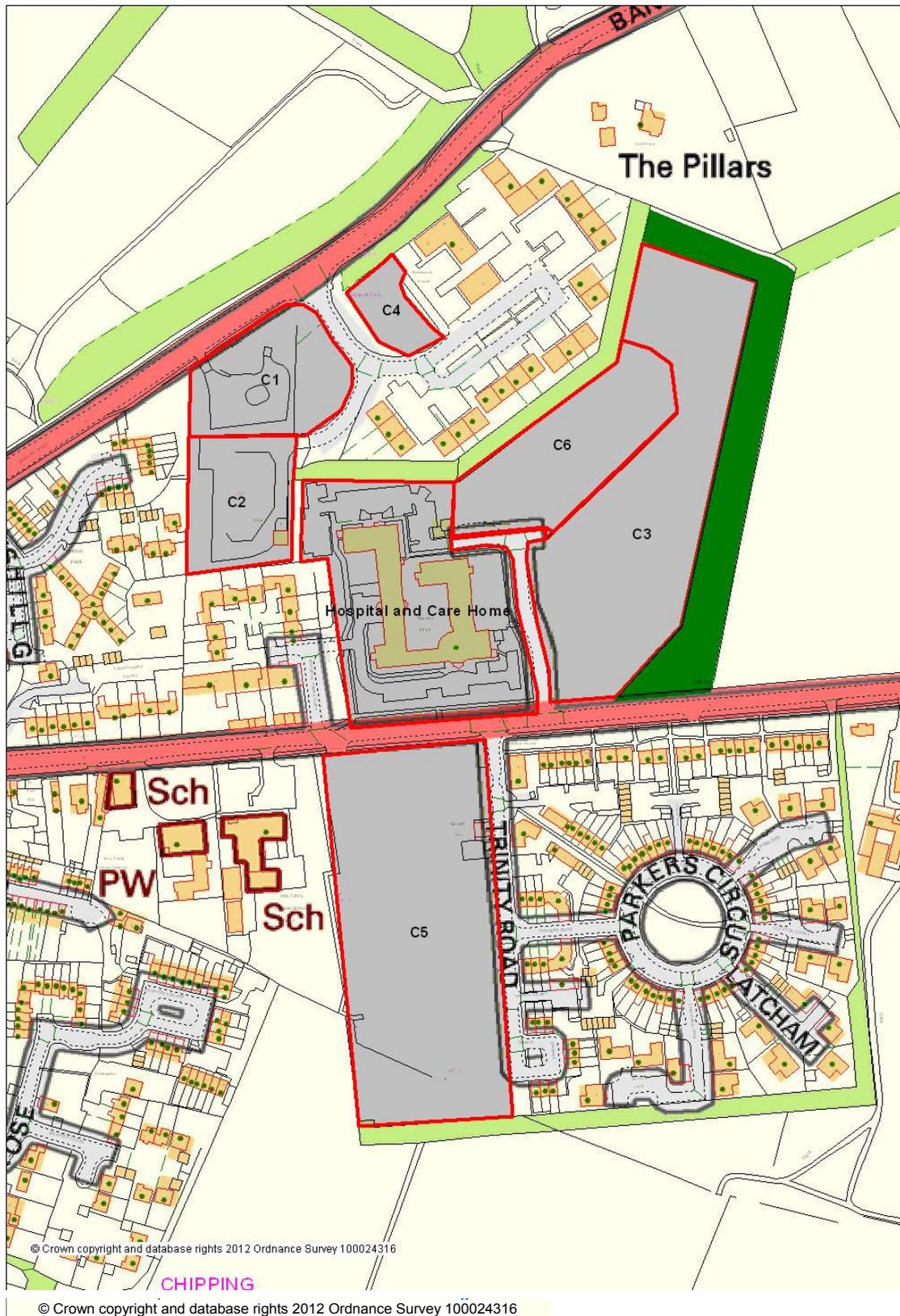
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Chipping Norton

- C1. Former highways depot with permission for office use (1350sqm, 0.5ha) (10/1084/P/S73 extension to outline permission W95/1521). Within Local Plan Proposal I for BI development. Currently vacant land.
- C2. Former highways depot. Within Local Plan Proposal I for BI development. Vacant Land (0.4ha)
- C3. Vacant land (1.6ha) within Local Plan Proposal I (total 4.5ha including depot site above) and allocated non-residential uses including employment (BI) and community healthcare facilities (C2) on a minimum of 1.6ha with housing on the residual area. A hospital and care home has been developed on the adjacent site (1.3ha). Current application for a healthcare centre (0.7ha) on the site – see C6. The whole of the remaining area 1.6ha is potentially available for employment or a mix of employment, healthcare and housing.
- C4. Remaining plot at Cromwell Park office park (0.1ha) - Block L (05/1323) 282sqm BI with permission, Block K recently completed - 461sqm BI (05/1844)
- C5. Former Parker Knoll Furniture Factory – 1.9ha of land cleared and vacant. Planning permissions 08/0828/P/FP and 08/1639/P/FP for BI business units approx 2000sqm on part of the site. Recent application for Sainsbury's superstore.
- C6. Local Plan Proposal I, Land off London Road - 0.7ha, planning application for health centre and pharmacy 12/1593/P/FP

Total available land = approx 5ha in total, 4.5 excluding land for health centre subject to current application.

Employment sites east of Chipping Norton



Lakeside, Standlake

- S1. Land at Lakeside Industrial Estate, Standlake – 1.9ha. Allocated in Local Plan 2011 for B2, B8 and similar uses. Not subject to planning permission.
- S2. Cotswold Farm Standlake – 3ha. Existing buildings with permission for conversion to storage and distribution. Planning permissions 11/0796/P/FP and 10/0043/P/FP.



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